


BBP Billing Automation


The presentation will begin shortly.
Please note that all attendees are in listen only mode.
Inquiries may be submitted using the **Questions** window.
A recording of this webinar will be sent out to all attendees.






Inquiries may be submitted using the **Questions** window.

Questions 

Show Answered Questions

X	Question ▲	Asker	Rec'd		Answer

 Send Privately  Send to All 

eMedApps - About Us

eMedApps is a Healthcare Information Technology Services company providing practices, clinics and hospitals with a full range of services, as well as a suite of products designed to increase efficiency and facilitate communication.

- Founded in 1999
- Working as partner with NextGen since 2001
- Worked as subcontractor for NextGen
- Serving healthcare clients across USA
- Services and Products for NextGen clients



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About Our Presenter



Utilize BBP to Perform Daily Activities

- Set Payment Batches to Post on the BBP
- Process Pending Charges
- Bill Encounters to Create Claims
- Create EDI Files 837P, 837I, ADA
- Print Paper Claims 1500, UB, ADA
- Print Encounter, Recall, Budget and Account Letters
- Create Patient Statements
- Claim Acknowledgment Import
- Claim Status Import
- ERA Import
- Unapplied Encounter Credits
- Month End Report Package

Create BBP Package

- Create BBP Package
- Name the Package
- Add Notification Status
- Multiple email addresses can be added by using a comma in between
- Select the BBP Server to run from

The screenshot shows the 'Package Properties' dialog box with the following fields and values:

- Package name: Name Package
- Priority: 1
- Upon completion: Notify on failed or Completed with failures
- Notification e-mail: Anyone@urpractice, Multiple@urpractice (separated by commas)
- Available NextGen Users and Groups: <Click to select Mail Recipient(s)>
- Created by: (empty)
- Created on: (empty)
- Last modified by: (empty)
- Last modified on: (empty)
- Last run time: (empty)
- Last run result: (empty)
- Next run time: (empty)
- Enabled?

The 'Servers' tab is selected, showing a table with the following data:

Server	Available?	Running?	Last Service Start Time	Last Service Stop Time
<input checked="" type="checkbox"/> EMEDAPPS\EMED-NGRDS01	Yes	Yes	03/03/2021 03:03:55 AM	04/12/2019 09:55:14 AM

A context menu is open over the table, listing the following actions:

- New...
- Open...
- Delete
- Copy...
- Copy To Practice
- Enable
- Disable
- Job Chart
- Queue Now
- Kill
- Refresh

Buttons for 'OK' and 'Cancel' are visible at the bottom right of the dialog.

BBP Package Can Hold Multiple Jobs

- You can Enable/Disable Packages or Jobs
- Can Select to Run just One of the Jobs on Demand by Clicking Run Once > Click OK > Then Que Now

The screenshot shows the 'Package Properties' dialog box for a package named 'Electronic Billing & Print Paper Claims'. The package is created by 'NextGen Admin' on '08/24/2006 03:41:38 PM' and is currently 'Enabled?'. The priority is set to '1'. The 'Upon completion' action is 'Notify on failed or Completed with failures'. The notification email is 'Anyone@urpractice.com'. The last run time was '04/10/2007 05:08:09 PM' and the last run result was 'Succeeded'. The next run time is '06/09/2021 03:36 AM'. The 'Available NextGen Users and Groups' field has a link to '<Click to select Mail Recipient(s)>'. The 'Jobs' tab is selected, showing a table of jobs with columns for 'Run Once', '#', 'Job Name', 'Type', 'Enabled?', and 'On Success'. A context menu is open over the 'Run Once' column, listing options: 'New...', 'Open...', 'Delete', 'Copy...', 'Copy To Practice', 'Enable', 'Disable', 'Job Chart', 'Queue Now', 'Kill', and 'Refresh'. The 'Queue Now' option is highlighted.

Run Once	#	Job Name	Type	Enabled?	On Success
<input type="checkbox"/>	1	Bill Encounters	Bill Encounters	No	Go to the next job
<input type="checkbox"/>	2	Print Primary 1500 Pending Claims	Print Pending Paper Claims	No	Go to the next job
<input type="checkbox"/>	3	Print Secondary 1500 Pending Claims	Print Pending Paper Claims	No	Go to the next job
<input type="checkbox"/>	4	Primary 1500 Electronic Claims	Generate Electronic Claim...	Yes	Go to the next job
<input type="checkbox"/>	5	Secondary/Tertiary 1500 Electronic Claims	Generate Electronic Claim...	Yes	Go to the next job
<input type="checkbox"/>	6	Print Primary UB Pending Claims	Print Pending Paper Claims	No	Go to the next job
<input type="checkbox"/>	7	Secondary/Tertiary UB Electronic Claims	Generate Electronic Claim...	Yes	Go to the next job
<input type="checkbox"/>	8	Primary UB Electronic Claims	Generate Electronic Claim...	Yes	Go to the next job

Create Jobs

- Select Desired Job Type
- Based on Job Selected Parameters will Display Below
- Name Job
- Settings for
 - Notification Email
 - If job succeeds options
 - If job fails options

Job Properties

Job number:

Job name:

Job type:

Upon completion:

Notification e-mail:

(separated by comma)

Available NextGen:

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Settings

Setting Name	Value
--------------	-------

Memorized Report Job Options

- It is important to set the appropriate Run Using Option with Memorized reports based on the size and time that the report will be scheduled for
 - Month End Reports should be run the Day After Close using the Report Server
 - You can choose to set Reports to Run from PM/EHR if you need same day data

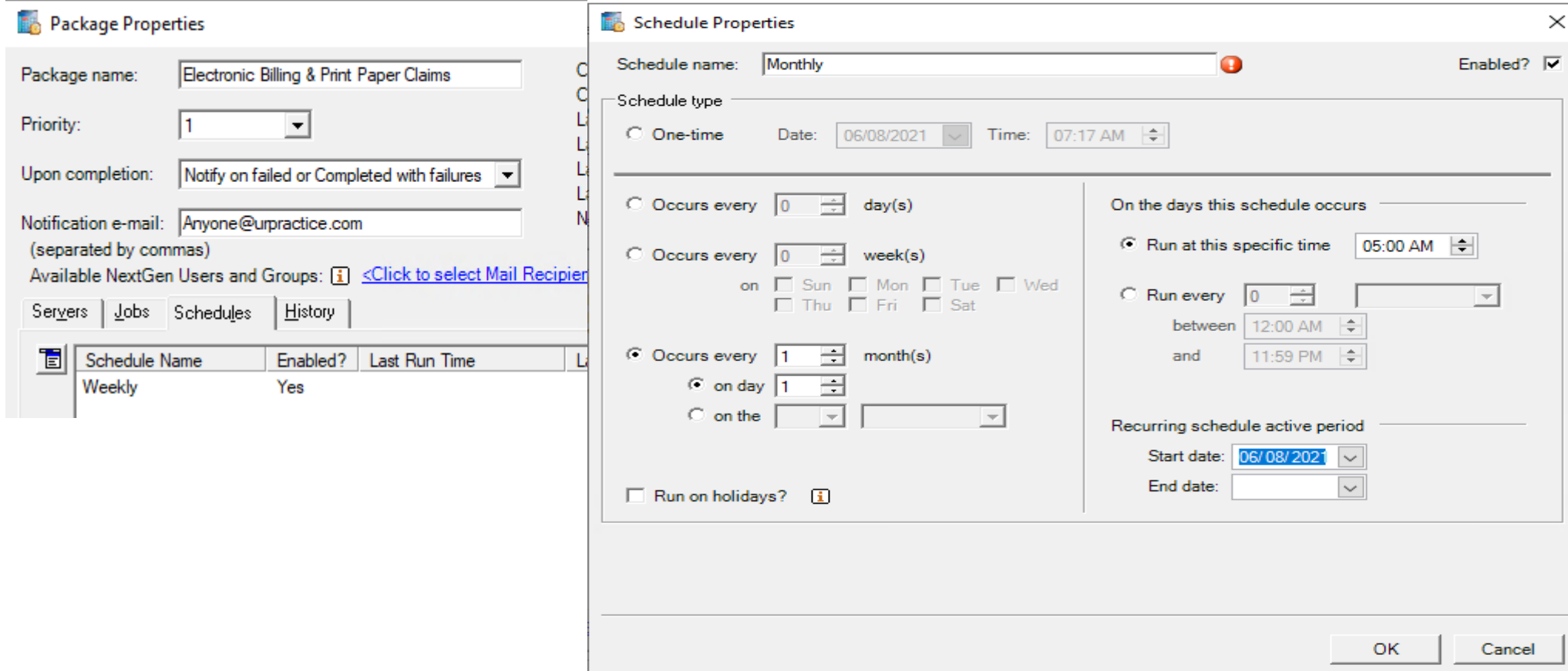
The screenshot shows the 'Job Properties' dialog box with the following settings:

- Job number: 1
- Job name: Month End Reports
- Job type: Memorized Reports
- Run as practice: NextGen Medical Practice
- Run using: Report Server
- Upon completion: Report Server (highlighted in blue)
- Notification e-mail: (separated by commas)
- On success / failure flow: If job succeeds, then: Go to the next job; If job fails, then: Go to the next job
- Enabled?

A red box highlights the 'Run using' and 'Upon completion' dropdown menus.

Set Package Schedule

- Based on the Package created, Set desired Run Days and Times



The image shows two overlapping dialog boxes from a software application. The background dialog is 'Package Properties' and the foreground dialog is 'Schedule Properties'.

Package Properties

- Package name: Electronic Billing & Print Paper Claims
- Priority: 1
- Upon completion: Notify on failed or Completed with failures
- Notification e-mail: Anyone@urpractice.com
- Available NextGen Users and Groups: [Click to select Mail Recipient](#)
- Navigation: Servers | Jobs | Schedules | History
- Table:

Schedule Name	Enabled?	Last Run Time
Weekly	Yes	

Schedule Properties

- Schedule name: Monthly
- Enabled?
- Schedule type:
 - One-time Date: 06/08/2021 Time: 07:17 AM
 - Occurs every 0 day(s)
 - Occurs every 0 week(s) on Sun Mon Tue Wed Thu Fri Sat
 - Occurs every 1 month(s)
 - on day 1
 - on the
 - Run on holidays?
- On the days this schedule occurs:
 - Run at this specific time 05:00 AM
 - Run every 0 between 12:00 AM and 11:59 PM
- Recurring schedule active period:
 - Start date: 06/08/2021
 - End date:

Buttons: OK, Cancel

History Tab

- Show Last Defaults to 7 Days but can be Increased to 365
- Highlight Line Item in the White Section to display results in the Gray Section. Some information you can review
 - Number of Items Processed
 - Duration to complete
 - Error Description/Number

Package Properties

Package name: Created by: Betsy Anderson Enabled?

Priority: Created on: 06/08/2021 07:53:28 AM

Upon completion: Last modified by: Betsy Anderson

Notification e-mail: Last modified on: 06/08/2021 07:53:28 AM

(separated by commas) Last run time:

Available NextGen Users and Groups: [<Click to select Mail Recipient\(s\)>](#) Last run result:

Next run time: 06/08/2021 08:04 AM

Servers | Jobs | Schedules | **History**

Job #	Job Name	Last Run Time	Result	Run Duration
-------	----------	---------------	--------	--------------

Issue: BPP jobs that export an Excel report are failing with the error below:
ERROR NUMBER: 91 ERROR DESCRIPTION: Object variable or With block variable not set. ERROR SOURCE: Microsoft.VisualBasic [from frmRptDesigner.MMExportExcel] [from frmRptDesigner.BBPEXport] [from frmRptDesigner.Go] [from frmRptList.MMLoadMemorizedReport] [from modBBPMainEPM.RunMemorizedReports] [from modBBPMainEPM.BBPMain]

Root Cause: N/A

Solution: There are there things you can try to resolve this issue,

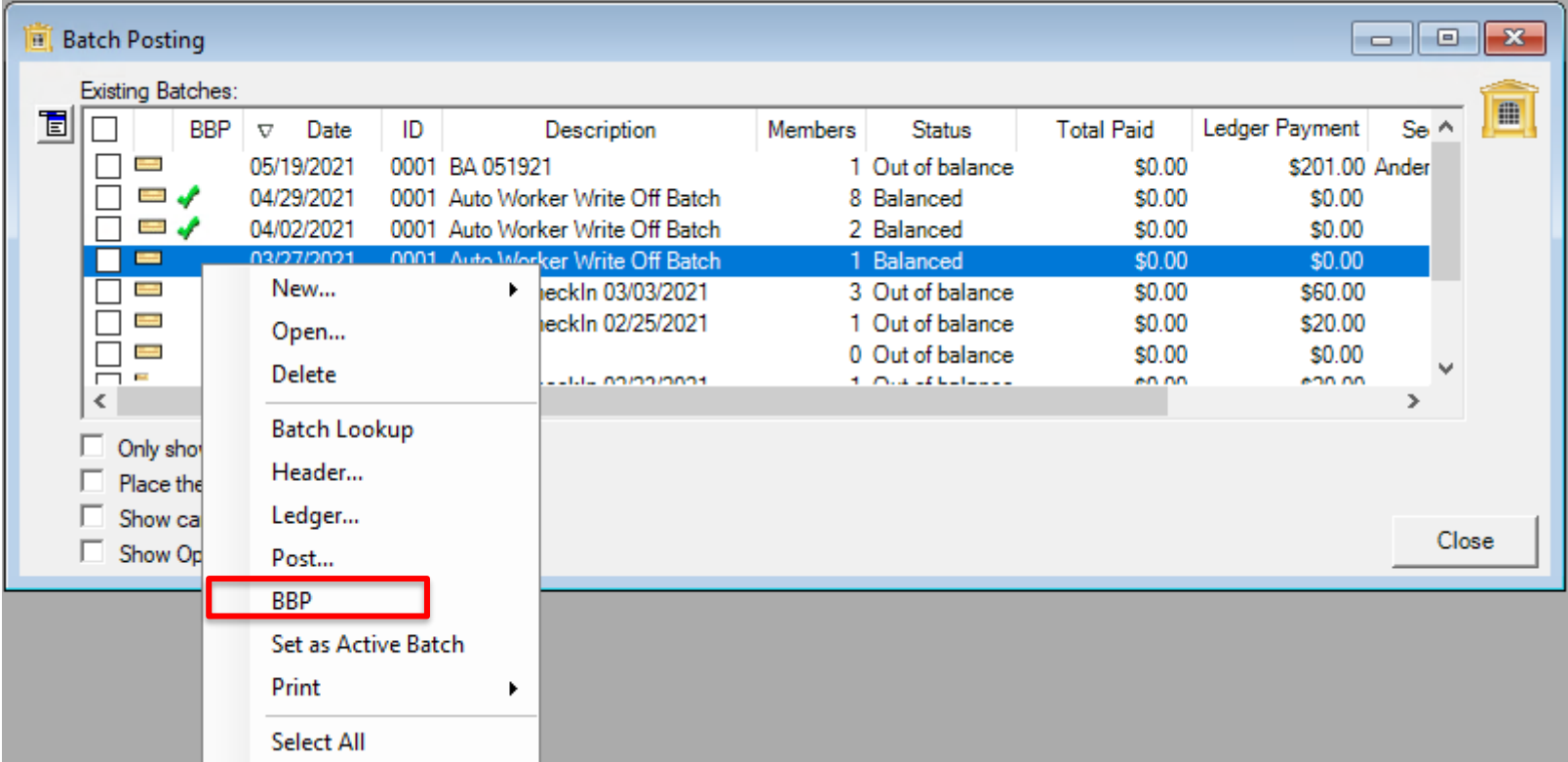
1. Open the job configuration in the BBP for the job failing with the error.
2. Export Format - set it to ASCII
3. Export File Name - add either .xls or .xlsx file extension depending on the version of Excel you have.
4. Click OK and run the job.

Show last day(s)

OK Cancel

PM Flag Batches to Post from BBP

- Once Batch has been Balanced, Select BBP to have the Batch Posted behind the scenes



The screenshot shows the 'Batch Posting' window with a table of existing batches. A context menu is open over a selected row, and the 'BBP' option is highlighted in a red box.

Existing Batches:	BBP	Date	ID	Description	Members	Status	Total Paid	Ledger Payment	Se
<input type="checkbox"/>		05/19/2021	0001	BA 051921	1	Out of balance	\$0.00	\$201.00	Ander
<input type="checkbox"/>	<input checked="" type="checkbox"/>	04/29/2021	0001	Auto Worker Write Off Batch	8	Balanced	\$0.00	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	04/02/2021	0001	Auto Worker Write Off Batch	2	Balanced	\$0.00	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	03/27/2021	0001	Auto Worker Write Off Batch	1	Balanced	\$0.00	\$0.00	
<input type="checkbox"/>				CheckIn 03/03/2021	3	Out of balance	\$0.00	\$60.00	
<input type="checkbox"/>				CheckIn 02/25/2021	1	Out of balance	\$0.00	\$20.00	
<input type="checkbox"/>					0	Out of balance	\$0.00	\$0.00	
<input type="checkbox"/>					1	Out of balance	\$0.00	\$20.00	

Context Menu Options:

- New...
- Open...
- Delete
- Batch Lookup
- Header...
- Ledger...
- Post...
- BBP**
- Set as Active Batch
- Print
- Select All

BBP Batch Posting Package

- Set up BBP Job to Post Balanced Batches

Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:

(separated by commas)

Available NextGen Users and Groups: [<Click to select Mail Recipient\(s\)>](#)

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Settings

Setting Name	Value
Batch Posting Report: Printer Name	
Batch Posting Report: Export Format	Excel
Batch Posting Report: Export File Name	batch_posting_report.xls
Batch Posting Report: Export Overwrite Option	Add a timestamp to the file name (filename_yyyymmddhhmmss.ext)
Batch Posting Report: Save Snapshot	No
Batch Posting Report: Snapshot Name	
Job runtime alert setting (minutes):	
Job runtime alert email:	

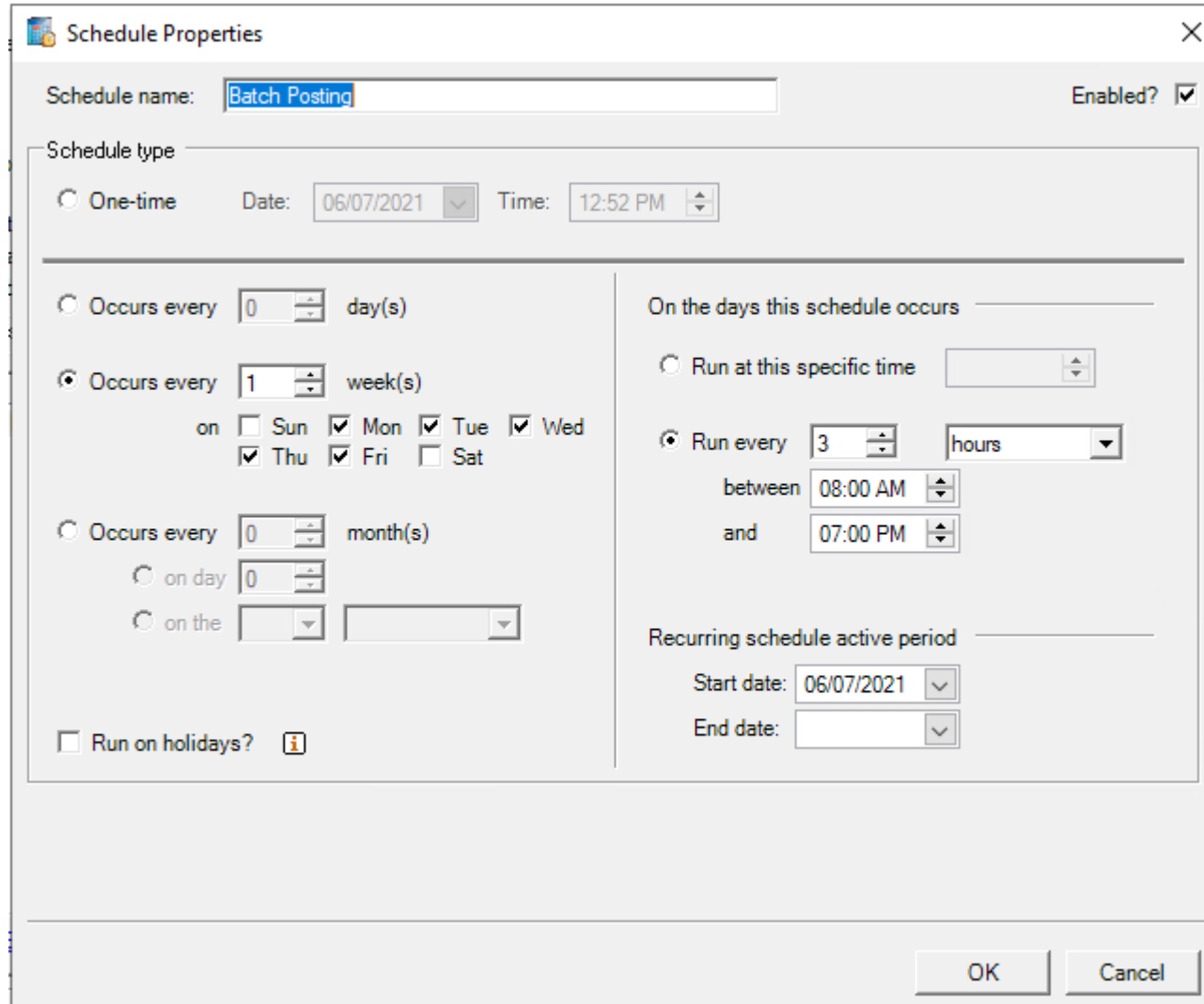
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

BBP Batch Posting Package

- Set desired Days/ Times for the Batches to Post
- Once at the end of every Business Day
- Or schedule in hour intervals



Schedule Properties

Schedule name: Enabled?

Schedule type

One-time Date: Time:

Occurs every day(s)


Occurs every week(s)

on Sun Mon Tue Wed
 Thu Fri Sat

Occurs every month(s)

on day

on the

Run on holidays? 

On the days this schedule occurs

Run at this specific time

Run every hours

between and

Recurring schedule active period

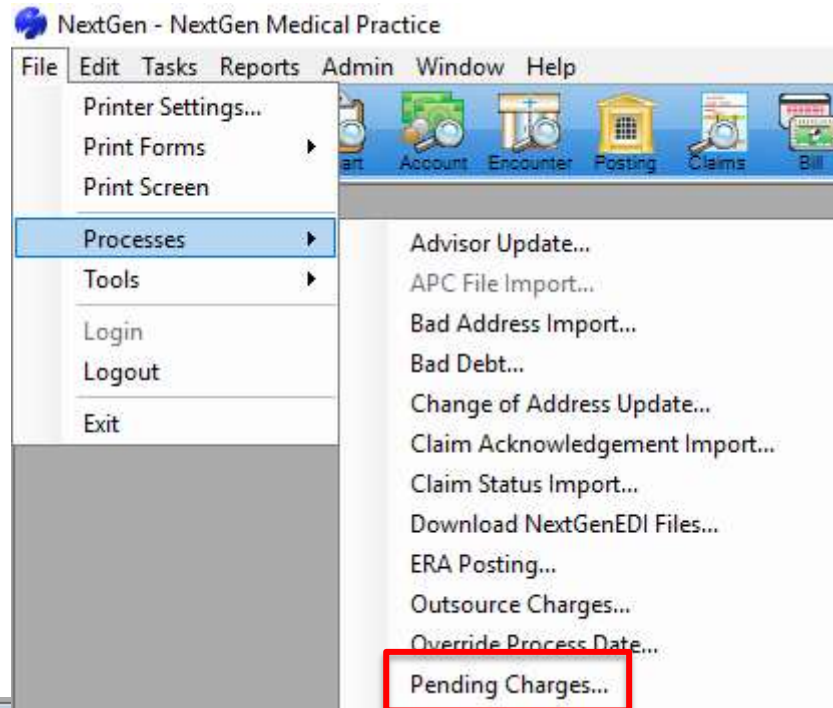
Start date:

End date:

OK Cancel

PM Process Pending Charges

- File > Process > Pending Charges



Process Pending Charges

Search Criteria

Service Location Rendering Physician Service Date (From) Service Date (To) Process Date Override

Financial Class Primary Payer

Pending Charge List

<input type="checkbox"/>	Enc Nbr	Pat Name	Location	Primary Payer	Service	Service Item Desc	Units	Amount	Service Dat	Rendering	App	Mod 1	Mod 2	Mod 3	Mod
--------------------------	---------	----------	----------	---------------	---------	-------------------	-------	--------	-------------	-----------	-----	-------	-------	-------	-----

BBP Process Pending Charges

- Set up BBP Job to Process Pending Charges

Job Properties

Job number: Job name: Job type: Run as practice: On success / failure flow: If job succeeds, then: If job fails, then: Enabled?

Upon completion: Notification e-mail: (separated by commas) Available NextGen Users and Groups: [Click to select Mail](#)

Settings

Setting Name	Value
Service Location	
Rendering Physician	
Service Date From/To	
Pending Action	Process
Job runtime alert setting (minutes):	
Job runtime alert email:	

Indicate Date Range

From Date: Today Yesterday 2 day(s) ago Earliest possible date

To Date: Today Yesterday 3 day(s) ago

Clear OK Cancel

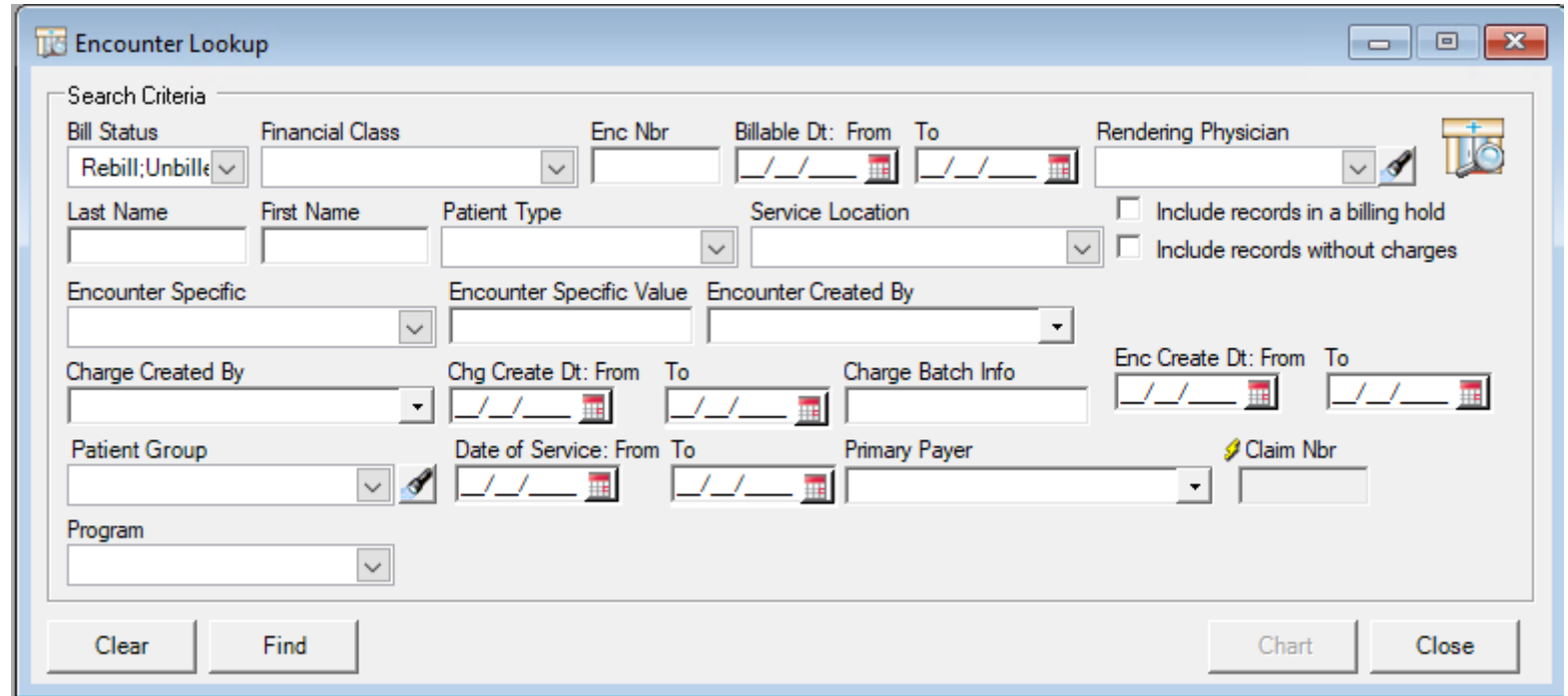
Run this job in debug mode (PM-related jobs only) Log all SQL for this job (PM-related jobs only) OK Cancel

PM Bill Encounters

- Bill Encounters

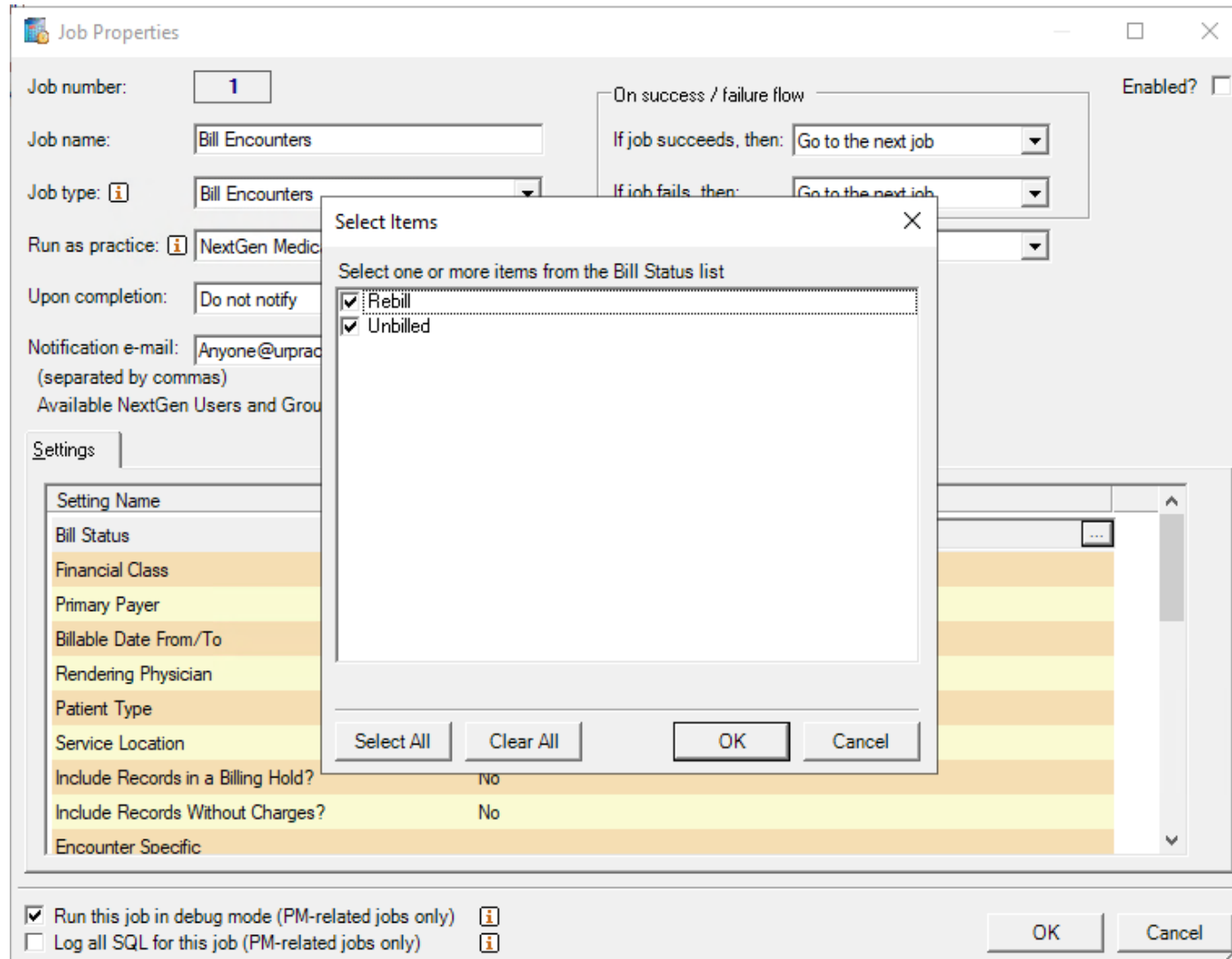


- Rebill > Unbilled
- Do not Include Records without charges

A screenshot of a software application window titled "Encounter Lookup". The window contains a "Search Criteria" section with various input fields and buttons. The fields include: "Bill Status" (dropdown menu with "Rebill;Unbill" selected), "Financial Class" (dropdown menu), "Enc Nbr" (text input), "Billable Dt: From To" (two date pickers), "Rendering Physician" (dropdown menu with a search icon), "Last Name" (text input), "First Name" (text input), "Patient Type" (dropdown menu), "Service Location" (dropdown menu), "Encounter Specific" (dropdown menu), "Encounter Specific Value" (text input), "Encounter Created By" (dropdown menu), "Charge Created By" (dropdown menu), "Chg Create Dt: From To" (two date pickers), "Charge Batch Info" (text input), "Enc Create Dt: From To" (two date pickers), "Patient Group" (dropdown menu with a search icon), "Date of Service: From To" (two date pickers), "Primary Payer" (dropdown menu), "Claim Nbr" (text input), and "Program" (dropdown menu). At the bottom of the window are four buttons: "Clear", "Find", "Chart", and "Close". There are also two checkboxes on the right side: "Include records in a billing hold" and "Include records without charges", both of which are currently unchecked.

Bill Encounters from the BBP

- Set up to Bill Encounters



The screenshot shows the 'Job Properties' dialog box for a job named 'Bill Encounters'. The job number is '1' and the job type is 'Bill Encounters'. The 'Run as practice' is 'NextGen Medic'. The 'Upon completion' is set to 'Do not notify'. The 'Notification e-mail' is 'Anyone@urprac'. The 'Available NextGen Users and Groups' section is empty. The 'Settings' section is expanded to show a list of settings: 'Bill Status', 'Financial Class', 'Primary Payer', 'Billable Date From/To', 'Rendering Physician', 'Patient Type', 'Service Location', 'Include Records in a Billing Hold?' (No), and 'Include Records Without Charges?' (No). The 'Encounter Specific' section is also visible. The 'On success / failure flow' section is set to 'Go to the next job' for both success and failure. The 'Enabled?' checkbox is checked. A 'Select Items' dialog box is open over the 'Settings' section, showing a list of items to select from the 'Bill Status' list. The items 'Rebill' and 'Unbilled' are selected. The 'Select All', 'Clear All', 'OK', and 'Cancel' buttons are visible at the bottom of the 'Select Items' dialog. At the bottom of the 'Job Properties' dialog, there are checkboxes for 'Run this job in debug mode (PM-related jobs only)' (checked) and 'Log all SQL for this job (PM-related jobs only)' (unchecked). The 'OK' and 'Cancel' buttons are also visible at the bottom right of the 'Job Properties' dialog.

Job number: 1

Job name: Bill Encounters

Job type: Bill Encounters

Run as practice: NextGen Medic

Upon completion: Do not notify

Notification e-mail: Anyone@urprac
(separated by commas)
Available NextGen Users and Groups

Settings

Setting Name	Value
Bill Status	
Financial Class	
Primary Payer	
Billable Date From/To	
Rendering Physician	
Patient Type	
Service Location	
Include Records in a Billing Hold?	No
Include Records Without Charges?	No
Encounter Specific	

On success / failure flow

If job succeeds, then: Go to the next job

If job fails, then: Go to the next job


Enabled?


Select Items

Select one or more items from the Bill Status list

- Rebill
- Unbilled

Select All Clear All OK Cancel

Run this job in debug mode (PM-related jobs only) 

Log all SQL for this job (PM-related jobs only) 

OK Cancel

Bill Encounters from the BBP

- Select desired Timeframe

Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:
(separated by commas)

Available NextGen Users and Groups

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Indicate Date Range

From Date

Today

Yesterday

day(s) ago

Earliest possible date

To Date

Today

Yesterday

day(s) ago

Clear OK Cancel

Setting Name

Encounter Specific

Encounter Created By

Encounter Date From/To

Charge Created By

Charge Create Date From/To

Charge Batch Info

Itemized Bills: Printer Name

Claim Production Status Report: Printer Name

Claim Production Status Report: Export Format Excel

Claim Production Status Report: Export File Name C:\Documents and Settings\bnelson\Mv Documents\EPM\Test Reports for PR...

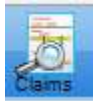
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

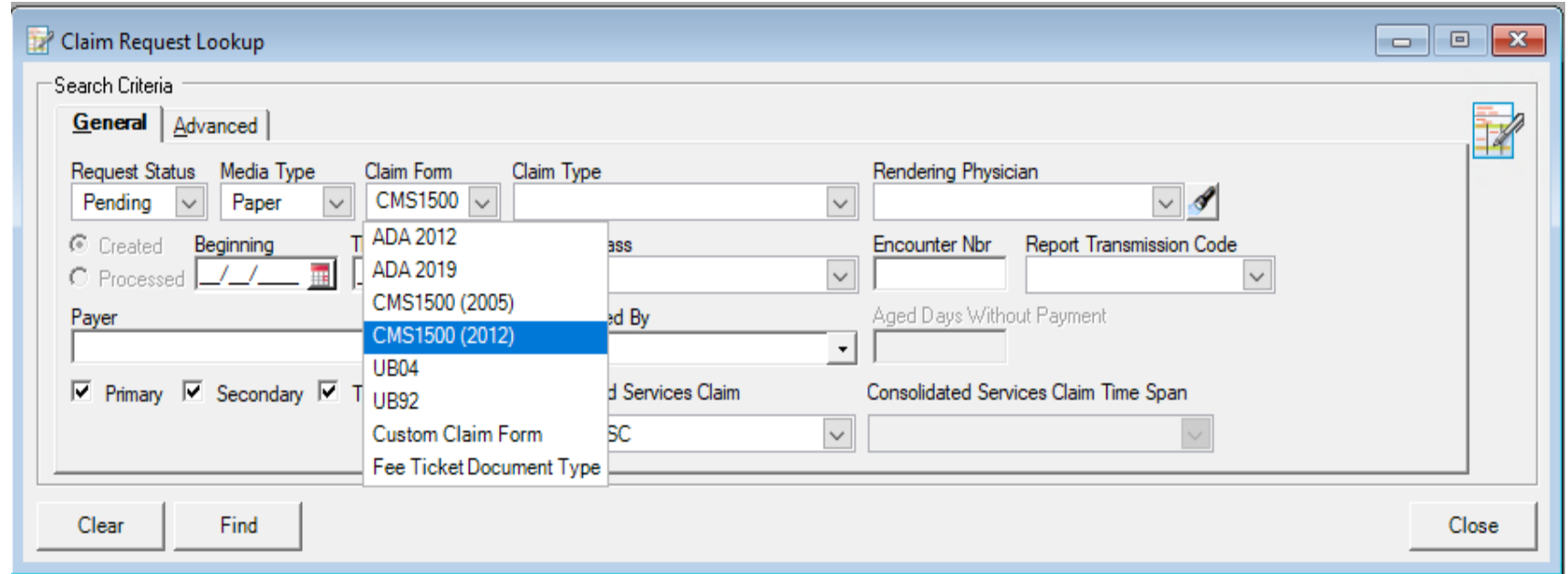
OK Cancel

PM Print Claims

- Print Pending Paper Claims



- Print 1500, UB, & ADA Forms
 - Primary
 - Secondary
 - Tertiary



Print Forms – Unique Job for 1500/UB/ADA

- Set Claim Form to Print from Specified Tray
- Indicate COB
- Update Status to Archived
- Spring 2021 Version we can also print Custom Claim Forms

The screenshot shows the 'Job Properties' dialog box with the 'Print/Export Settings' sub-dialog open. The 'Print/Export Settings' dialog has two radio buttons: 'Print - indicate printer name below' (selected) and 'Export - indicate export file name below'. The printer name field contains 'HP LaserJet 4 Plus; Orientation = Portrait; Tray = Automatically Select; Size = Letter; Copies = 1'. The 'Export file overwrite option' dropdown is set to 'Add a timestamp to the file name (filename_yyyymmddhhmmss.ext)'. The 'E-mail export file to:' field is empty.

Job Properties

Job number: On success / failure flow Enabled?

Job name: If job succeeds, then:

Job type: If job fails, then:

Run as practice:

Upon completion:

Notification e-mail:

(separated by commas)

Available NextGen Users and Groups:

Settings | Practices

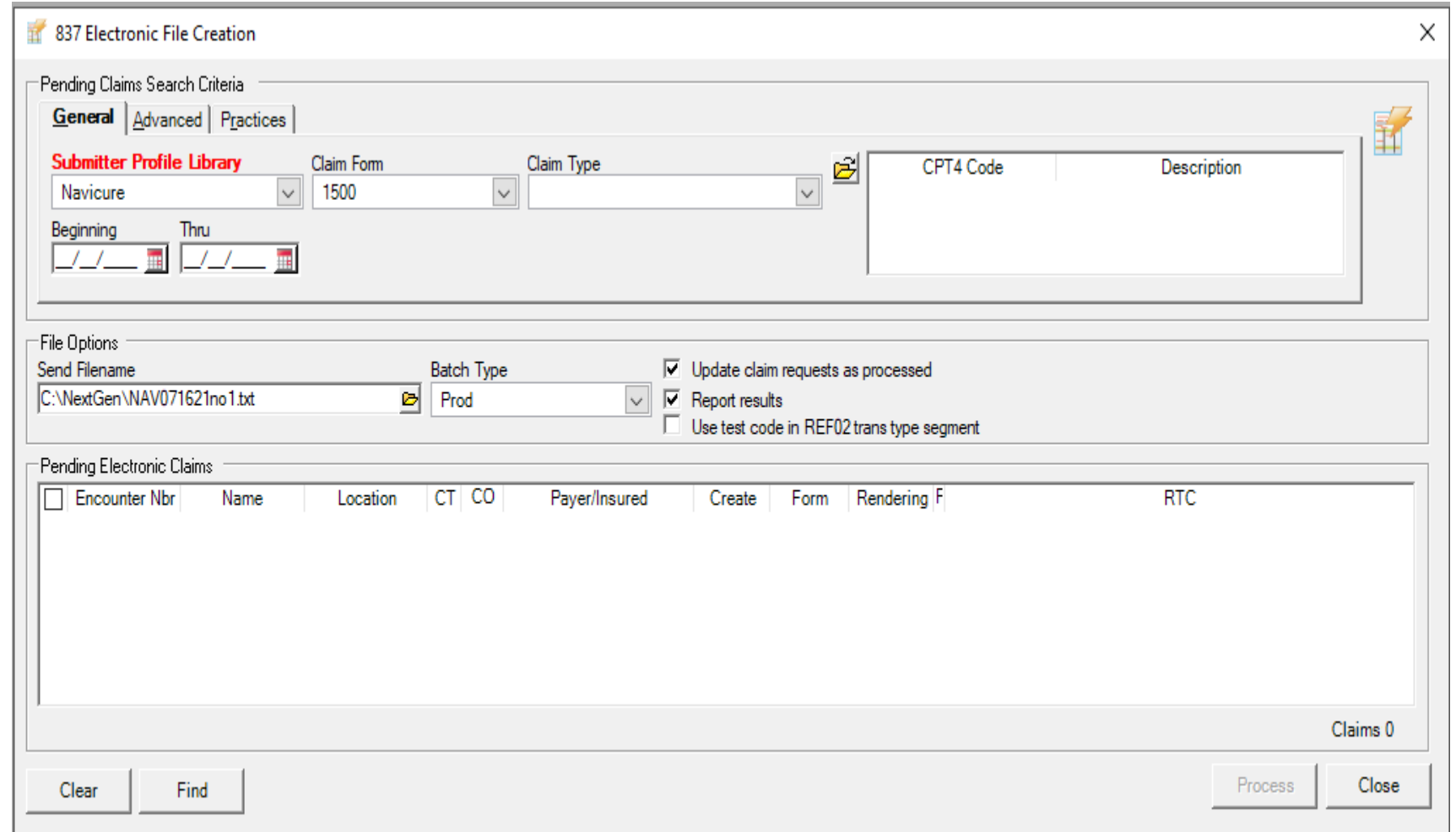
Setting Name	Value
Claim Print Action	laserJet 4 Plus;Orientation=
Claim Form	1500
Claim Type	
Rendering Physician	
Financial Class	Auto Accident; BCBS; Com
Primary	Yes
Secondary	No
Tertiary	No
Claim Request Create Date From/To	
Update "Pending" to "Archived" Status	Yes

Run this job in debug mode (PM-related jobs only) Log all SQL for this job (PM-related jobs only)

OK Cancel

PM Create EDI Files

- Select Submitter Profile
- Create File for each form type



837 Electronic File Creation

Pending Claims Search Criteria

General | Advanced | Practices

Submitter Profile Library Claim Form Claim Type

Navicare 1500

Beginning Thru

CPT4 Code	Description
-----------	-------------

File Options

Send Filename Batch Type

C:\NextGen\NAV071621no1.txt Prod

Update claim requests as processed
 Report results
 Use test code in REF02 trans type segment

Pending Electronic Claims

Encounter Nbr	Name	Location	CT	CO	Payer/Insured	Create	Form	Rendering F	RTC
---------------	------	----------	----	----	---------------	--------	------	-------------	-----

Claims 0

Clear Find Process Close

Create EDI Files

- Same Options available to set on the BBP
- Update Status to Archived

Job Properties

Job number:

Job name:

Job type:

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Run as practice:

Upon completion:

Notification e-mail:

(separated by commas)

Available NextGen Users and Groups: [Click to select Mail Recipient\(s\)](#)

Settings | Practices

Setting Name	Value
Submitter Profile Library	Navicure
Claim File Name	C:\NextGen\UGMBBPEXPORTEXAMPLE\Claimfileexport; Append timestamp; ...
Claim Form	1500
Claim File Batch Type	Prod
Payer List	
Update Claim Requests as Processed	Yes
Primary	Yes
Secondary	No
Tertiary	No
Financial Class	

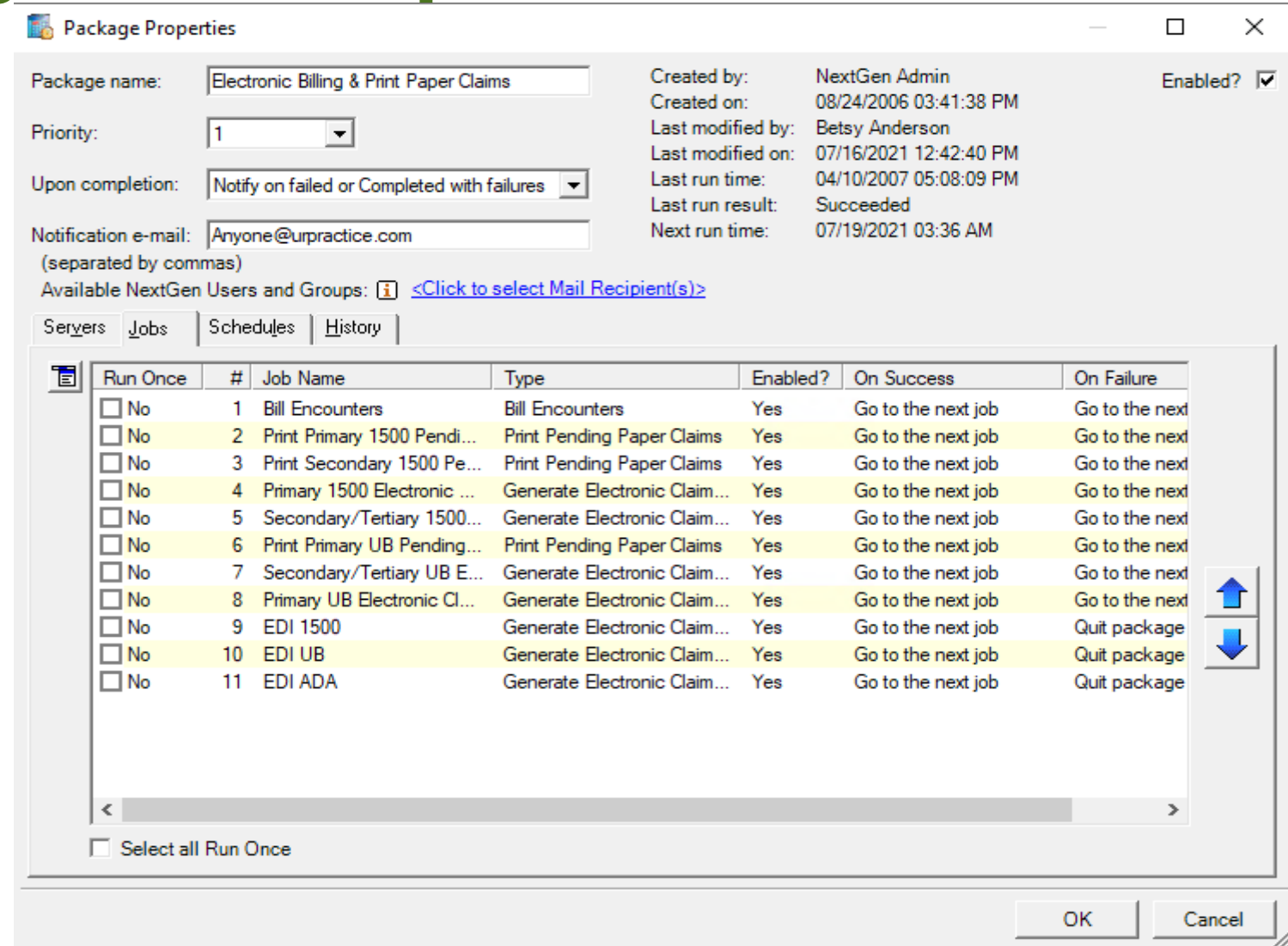
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

BBP Package to Complete the Claim Process

- Bill Encounters
- Print 1500, UB, & ADA Forms
 - Primary
 - Secondary
 - Tertiary
- Create Electronic Claim Files
 - By Clearinghouse
 - By Claim File Type



Package Properties

Package name: Created by: NextGen Admin Enabled?

Priority: Created on: 08/24/2006 03:41:38 PM

Upon completion: Last modified by: Betsy Anderson

Notification e-mail: Last modified on: 07/16/2021 12:42:40 PM

(separated by commas) Last run time: 04/10/2007 05:08:09 PM

Available NextGen Users and Groups: [<Click to select Mail Recipient\(s\)>](#) Last run result: Succeeded

Next run time: 07/19/2021 03:36 AM

Servers | Jobs | Schedules | History

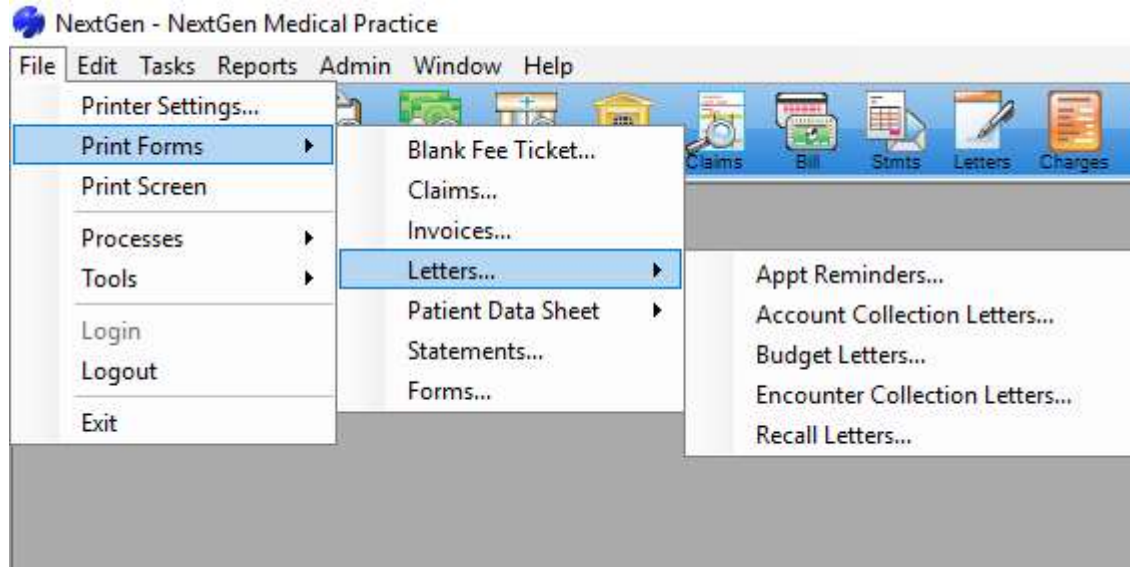
Run Once	#	Job Name	Type	Enabled?	On Success	On Failure
<input type="checkbox"/> No	1	Bill Encounters	Bill Encounters	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	2	Print Primary 1500 Pendi...	Print Pending Paper Claims	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	3	Print Secondary 1500 Pe...	Print Pending Paper Claims	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	4	Primary 1500 Electronic ...	Generate Electronic Claim...	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	5	Secondary/Tertiary 1500...	Generate Electronic Claim...	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	6	Print Primary UB Pending...	Print Pending Paper Claims	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	7	Secondary/Tertiary UB E...	Generate Electronic Claim...	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	8	Primary UB Electronic Cl...	Generate Electronic Claim...	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	9	EDI 1500	Generate Electronic Claim...	Yes	Go to the next job	Quit package
<input type="checkbox"/> No	10	EDI UB	Generate Electronic Claim...	Yes	Go to the next job	Quit package
<input type="checkbox"/> No	11	EDI ADA	Generate Electronic Claim...	Yes	Go to the next job	Quit package

Select all Run Once

OK Cancel

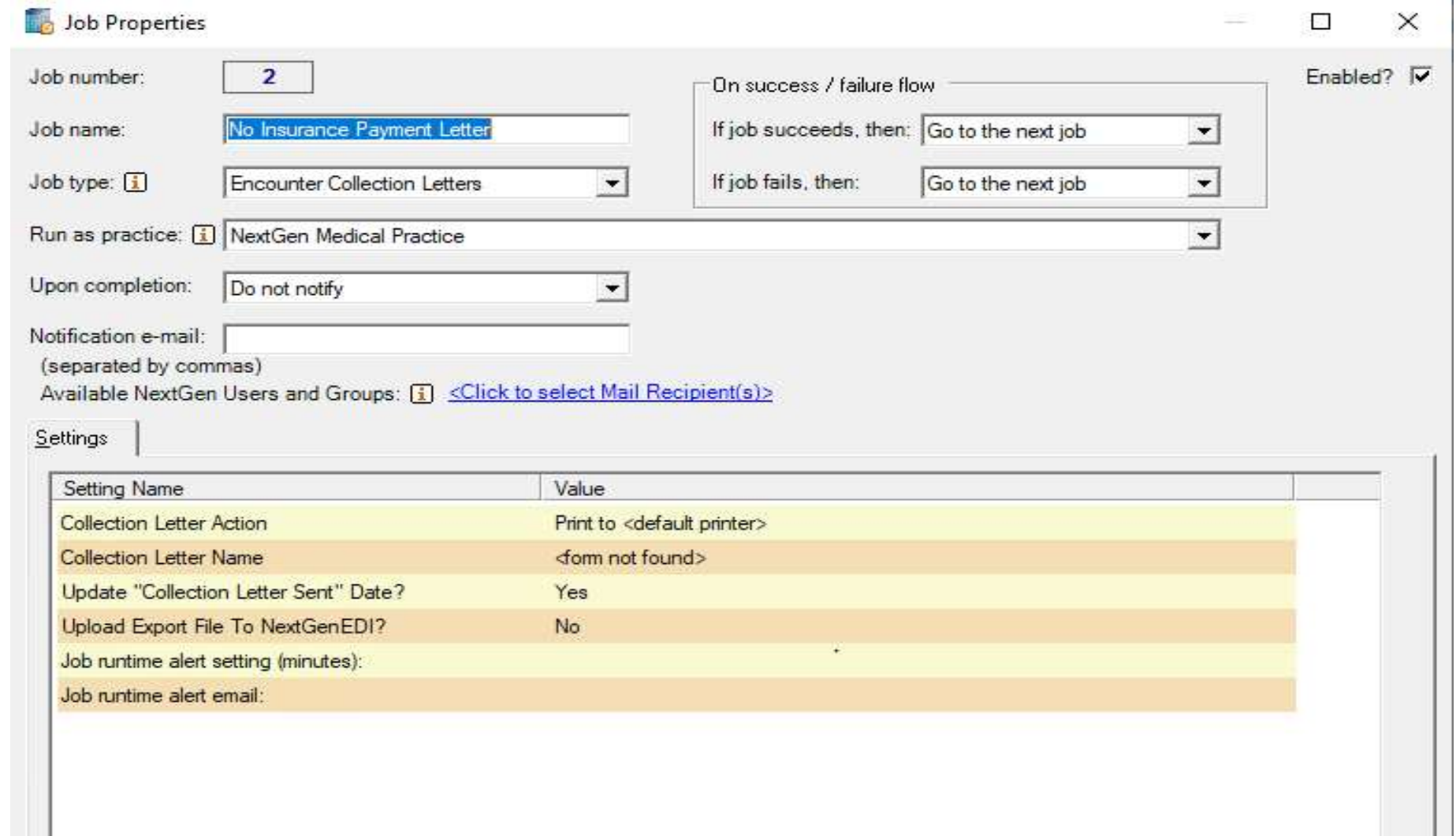
PM Print Letters

- File > Print Forms > Letters
- Select each letter type individually to Print



Print Letters

- Create a Job for each Letter Type
 - Recall
 - Budget
 - Encounter
 - Account
- Select Default Printer
- Select which Letter to Print



Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:

(separated by commas)

Available NextGen Users and Groups: [Click to select Mail Recipient\(s\)](#)

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Settings

Setting Name	Value
Collection Letter Action	Print to <default printer>
Collection Letter Name	<form not found>
Update "Collection Letter Sent" Date?	Yes
Upload Export File To NextGenEDI?	No
Job runtime alert setting (minutes):	
Job runtime alert email:	

BBP Print Letters

- Create a Package to Print Letters

Package Properties

Package name: Created by: NextGen Admin Enabled?

Priority: Created on: 11/05/2007 09:09:07 AM

Upon completion: Last modified by: NextGen Admin

Notification e-mail: Last modified on: 11/05/2007 09:09:07 AM

(separated by commas) Last run time:

Available NextGen Users and Groups: [<Click to select Mail Recipient\(s\)>](#) Last run result:

Next run time: 07/18/2021 07:06 PM

Servers Jobs Schedules History

Run Once	#	Job Name	Type	Enabled?	On Success	On Failure
<input type="checkbox"/> No	1	Budget Letters	Budget Letters	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	2	No Insurance Payment L...	Encounter Collection Lett...	Yes	Go to the next job	Go to the next
<input type="checkbox"/> No	3	Request For Accident Info	Encounter Collection Lett...	Yes	Go to the next job	Go to the next
<input type="checkbox"/>	4	Recall	Recall Letters	Yes	Go to the next job	Quit package

Select all Run Once

OK Cancel

PM Print Statement

- File > Print Forms > Statements
- Parameters are Defaulted from Practice Preferences

The screenshot displays the NextGen Medical Practice application interface. The 'File' menu is open, showing the path 'File > Print Forms > Statements'. The 'Statement Options' dialog box is open, showing various configuration options for printing statements.

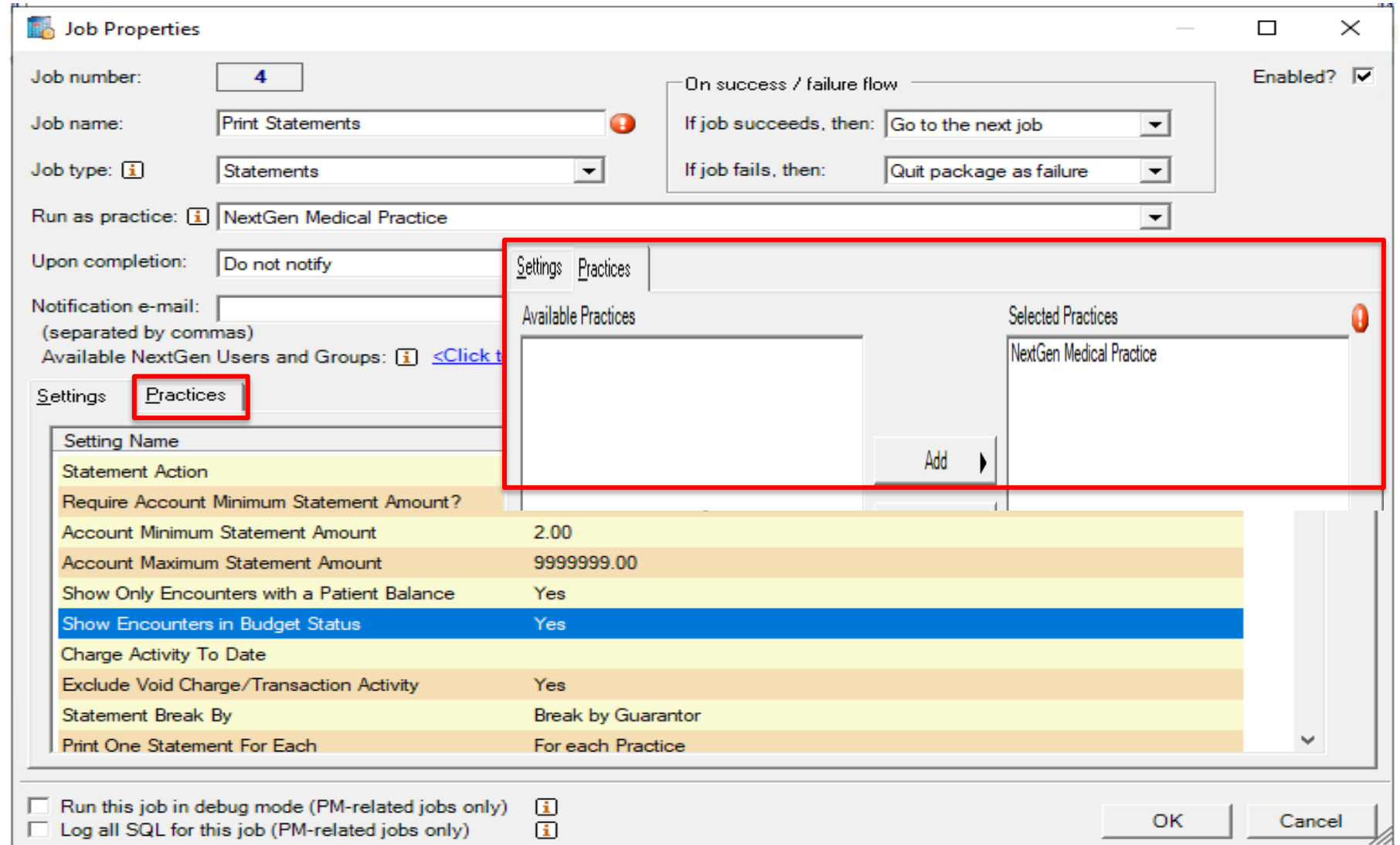
Statement Options Dialog Box:

- General Tab:**
 - Statement Account Options:**
 - Account Statement Amount Range: From \$2.00 To \$9,999,999.00
 - Acct Patient Balance Only
 - Acct Patient + Ins. Balance
 - Statement Encounter Options:**
 - Show Only Encounters with a Patient Balance
 - Show Encounters in Budget Status
 - Statement Charge Options:**
 - Show All Charges: From ___/___/___ To ___/___/___
 - Include Charge Activity To ___/___/___
 - Exclude Void Charge / Transaction Activity
 - Include Outsourced Charges
 - Statement History Options:**
 - Update Last Statement Dates
 - Update Dates on Forced Statements
- Statement Display Options:**
 - Statement Breaks:**
 - Break by Guarantor
 - Break by Patient
 - Print One Statement:** For Each Pr: [v]
 - Statement Sort By:** Zip Code [v]
 - Check for Statement Exceptions
 - Display Credit Balances on Statement
 - Display Detail Information on Statement
 - Include Bad Debt Encounters
 - Include All Line Items
 - Show Grid Lines
 - Suppress SIM Description
 - Exclude In Progress encounters
 - Upload Export File to NextGenEDI

Buttons at the bottom of the dialog: Preview, Print, Export, Late Fee, Stmt Report, Reset, Close.

Print Statement

- Set desired Parameters just to mimic as if you were running manually out of Practice Management
- If you use Budget Statements instead of Letters you can add them here too



Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:

(separated by commas)
Available NextGen Users and Groups:

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Practices

Available Practices

Selected Practices

NextGen Medical Practice

Add

Setting Name	
Statement Action	
Require Account Minimum Statement Amount?	
Account Minimum Statement Amount	2.00
Account Maximum Statement Amount	9999999.00
Show Only Encounters with a Patient Balance	Yes
Show Encounters in Budget Status	Yes
Charge Activity To Date	
Exclude Void Charge/Transaction Activity	Yes
Statement Break By	Break by Guarantor
Print One Statement For Each	For each Practice

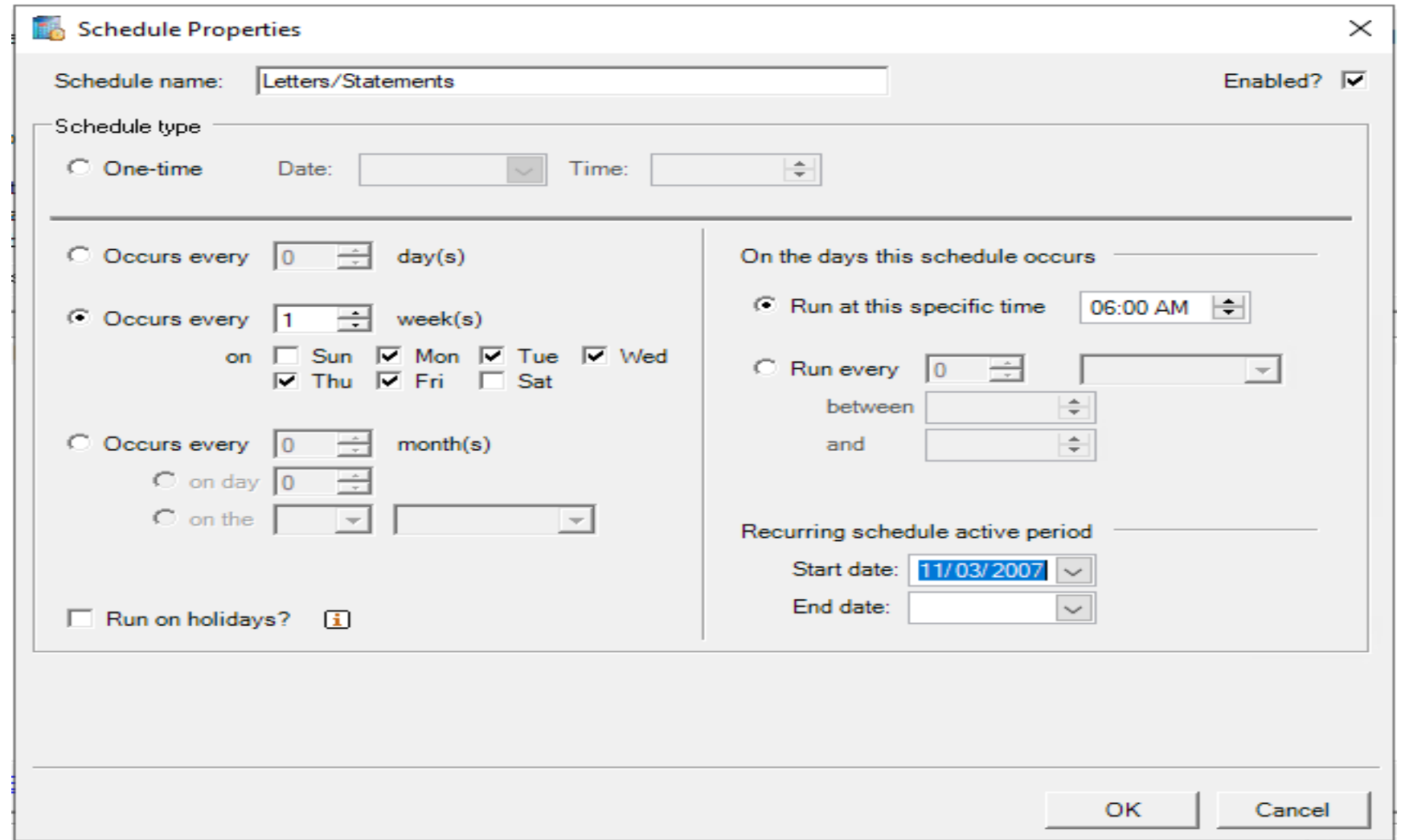
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

Print Statements

- Create a Schedule to run every weekday



Schedule Properties [X]

Schedule name: Enabled?


Schedule type

One-time Date: Time:

Occurs every day(s)

Occurs every week(s)
on Sun Mon Tue Wed
 Thu Fri Sat

Occurs every month(s)
 on day
 on the

Run on holidays? 

On the days this schedule occurs

Run at this specific time

Run every
between
and

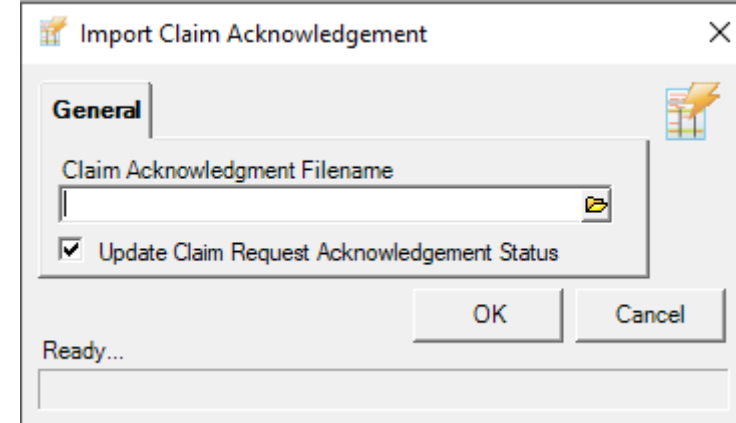
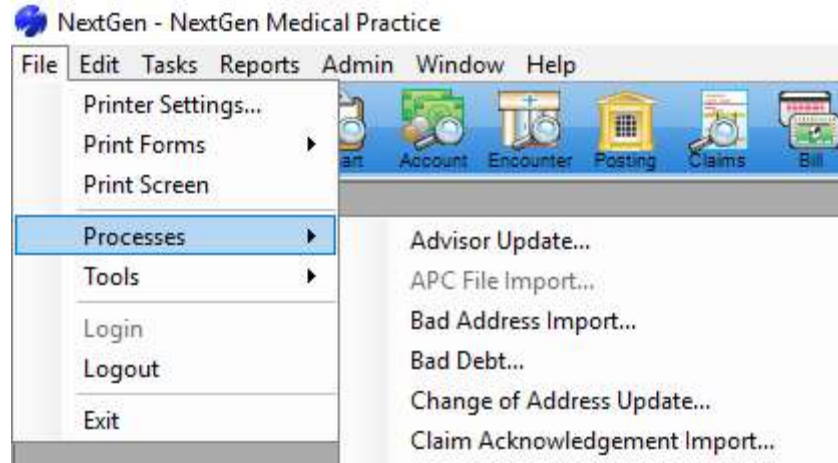
Recurring schedule active period

Start date:
End date:

OK Cancel

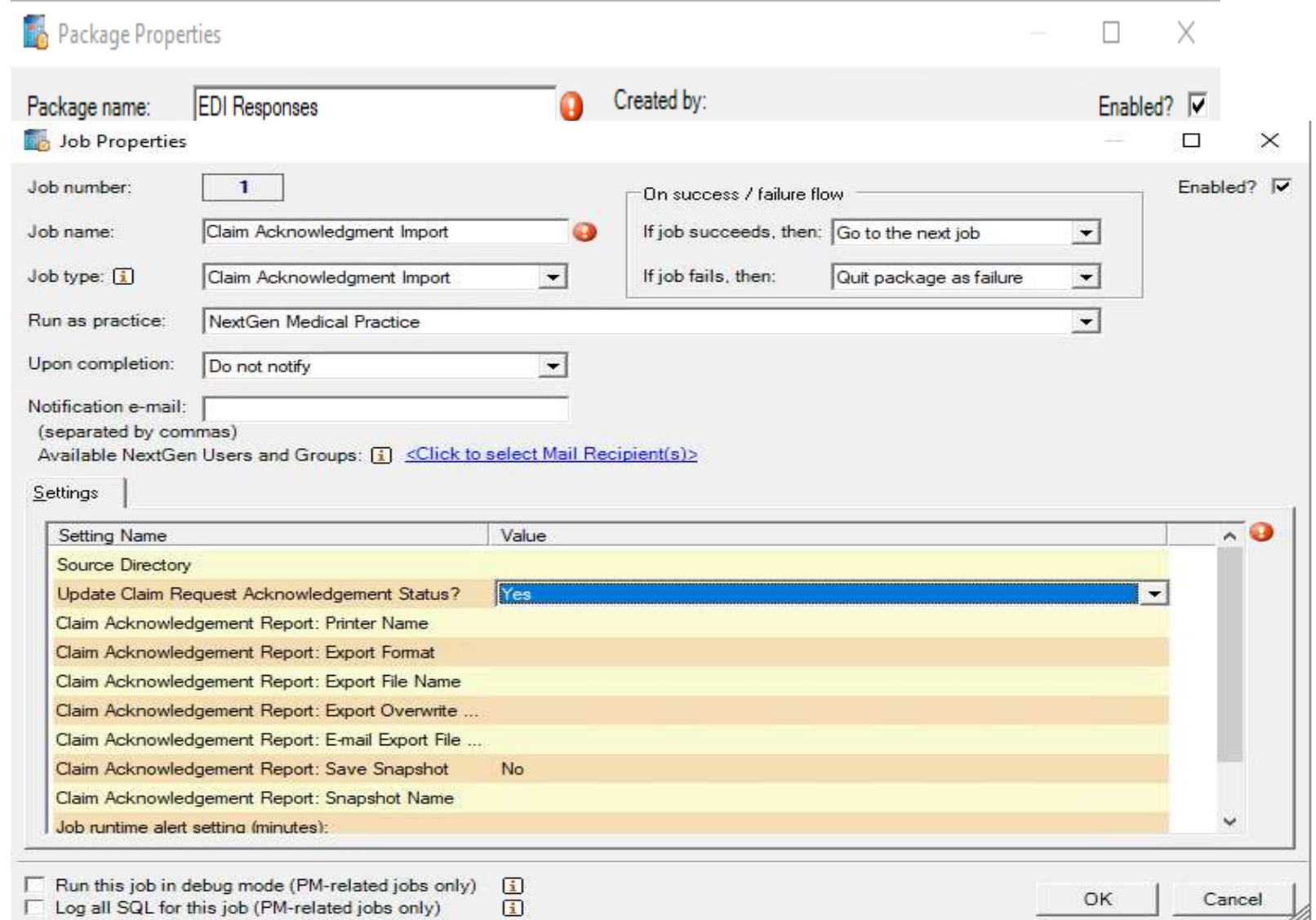
PM Claim Acknowledgement Import

- File > Processes > Claim Acknowledgement Import
- Update Request Status



Claim Acknowledgement Import

- Create Package For EDI Responses
- Set the Path to Import the 999 Files from
- Update Request Status



Package Properties

Package name: EDI Responses Created by: Enabled?

Job Properties

Job number: 1

Job name: Claim Acknowledgment Import

Job type: Claim Acknowledgment Import

Run as practice: NextGen Medical Practice

Upon completion: Do not notify

Notification e-mail: (separated by commas)

Available NextGen Users and Groups: [Click to select Mail Recipient\(s\)](#)

On success / failure flow Enabled?

If job succeeds, then: Go to the next job

If job fails, then: Quit package as failure

Settings

Setting Name	Value
Source Directory	
Update Claim Request Acknowledgement Status?	Yes
Claim Acknowledgement Report: Printer Name	
Claim Acknowledgement Report: Export Format	
Claim Acknowledgement Report: Export File Name	
Claim Acknowledgement Report: Export Overwrite ...	
Claim Acknowledgement Report: E-mail Export File ...	
Claim Acknowledgement Report: Save Snapshot	No
Claim Acknowledgement Report: Snapshot Name	
Job runtime alert setting (minutes):	

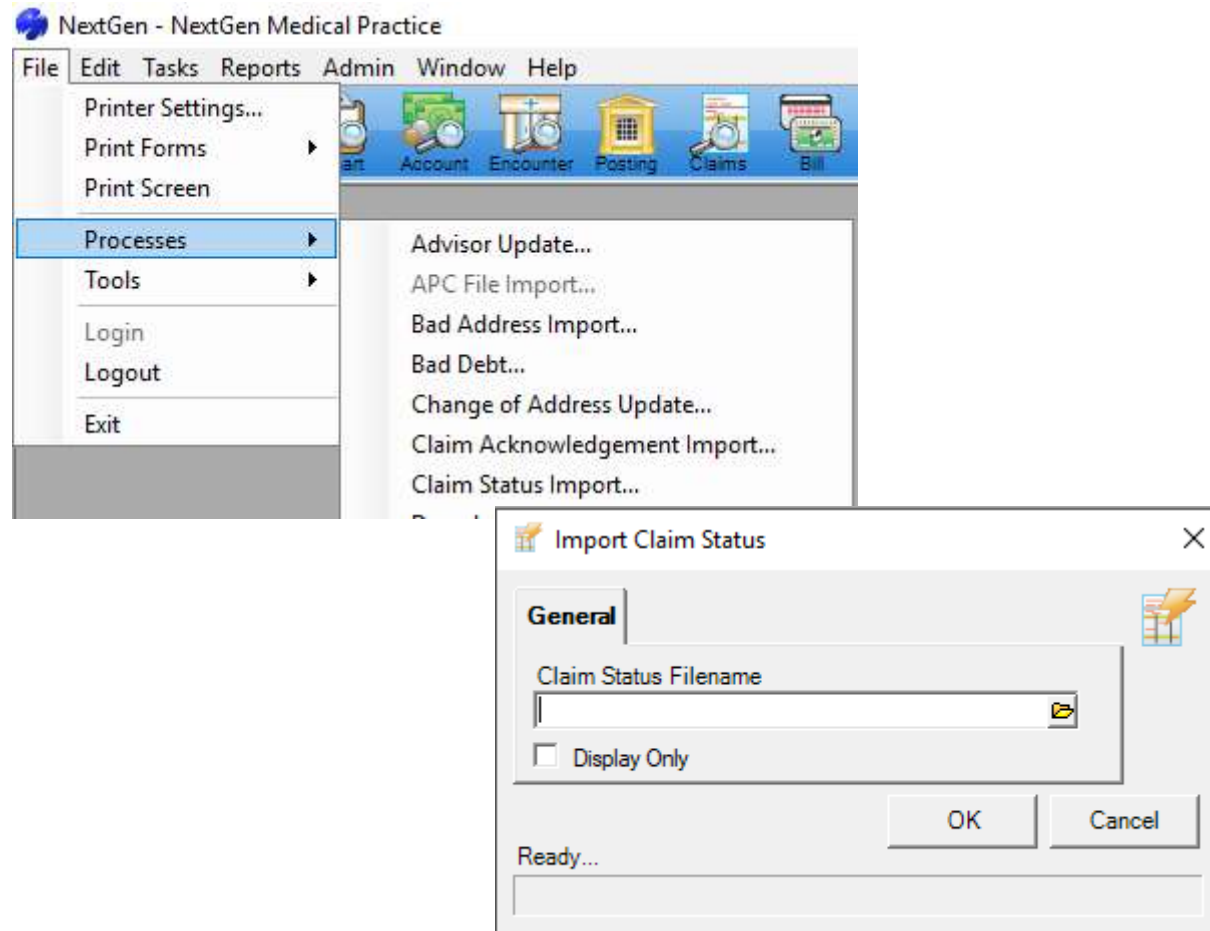
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

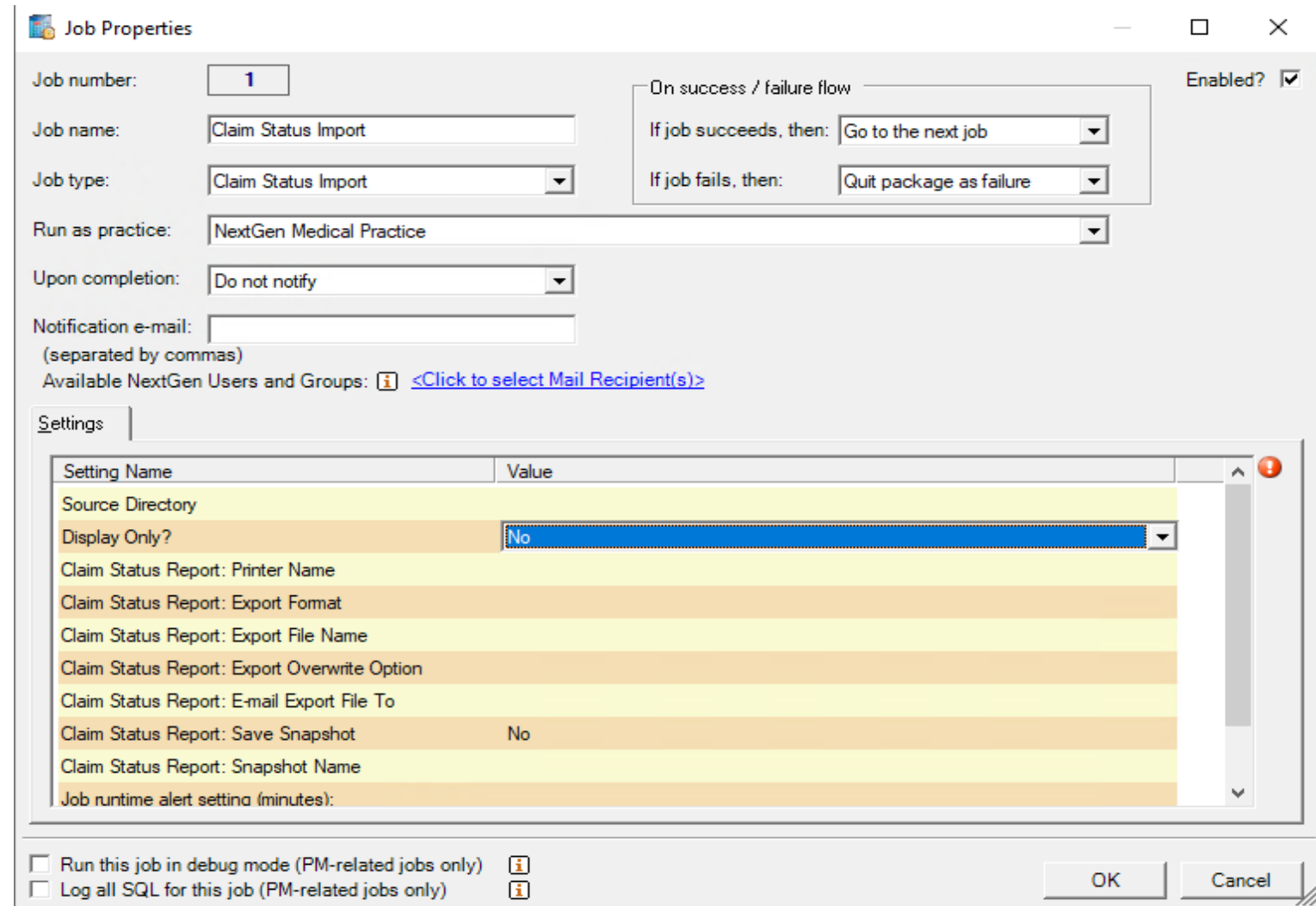
PM Claim Status Import

- File > Processes > Claim Status Import



Claim Status Import

- Set the Path to Import the 277 Files from
- Update Request Status



The screenshot shows the 'Job Properties' dialog box for a 'Claim Status Import' job. The job is enabled and configured with the following settings:

- Job number: 1
- Job name: Claim Status Import
- Job type: Claim Status Import
- Run as practice: NextGen Medical Practice
- Upon completion: Do not notify
- Notification e-mail: (empty)
- On success / failure flow: Enabled?
 - If job succeeds, then: Go to the next job
 - If job fails, then: Quit package as failure

The 'Settings' tab is active, showing a table of configuration options:

Setting Name	Value
Source Directory	
Display Only?	No
Claim Status Report: Printer Name	
Claim Status Report: Export Format	
Claim Status Report: Export File Name	
Claim Status Report: Export Overwrite Option	
Claim Status Report: E-mail Export File To	
Claim Status Report: Save Snapshot	No
Claim Status Report: Snapshot Name	
Job runtime alert setting (minutes):	

At the bottom, there are two unchecked checkboxes: 'Run this job in debug mode (PM-related jobs only)' and 'Log all SQL for this job (PM-related jobs only)'. The 'OK' and 'Cancel' buttons are visible at the bottom right.

Report On 277/999 Files Imported

- Run the Claim Request Report For Desired Timeframe and Archived Electronic Claims

NextGen - NextGen Medical Practice - [Patient Chart - Test, Tina]

File Edit Tasks Reports Admin Window Help

General Accounts Receivable Scheduling Tasks Health Center Alerts Anesthesia Concurrency Audit Log Authorizations BBP Schedule Claim Requests

NextGen Report Filter: Claim Requests

Settings List
 Claim Forms
 Claim Types
 Columns
 Filter 1
 Filter 2
 Fin Classes
 Locations
 Primary Payers
 Rendering Phys
 Sorting
 Totals

Include records that meet the following conditions

Create Date [] [] []

Processed Date Last Week 05/23/2021 05/29/2021

Request Status Pending Archived HOLD Consolidated

Payer Seq Primary Secondary Tertiary

Media Type Paper Electronic

Name A to Z

Status Cat Code []

Status Code []

◀ [Claim Status Category Desc](#)

Finalized/Payment-The claim/line has been paid.
 Finalized/Payment-The claim/line has been paid.
 Acknowledgement/Forwarded-The claim/encounter has been forwarded to another entity.
 Acknowledgement/Forwarded-The claim/encounter has been forwarded to another entity.
 Acknowledgement/Forwarded-The claim/encounter has been forwarded to another entity.
 Acknowledgement/Rejected for relational field in error.
 Acknowledgement/Forwarded-The claim/encounter has been forwarded to another entity.

◀ [Claim Status Code Desc](#)

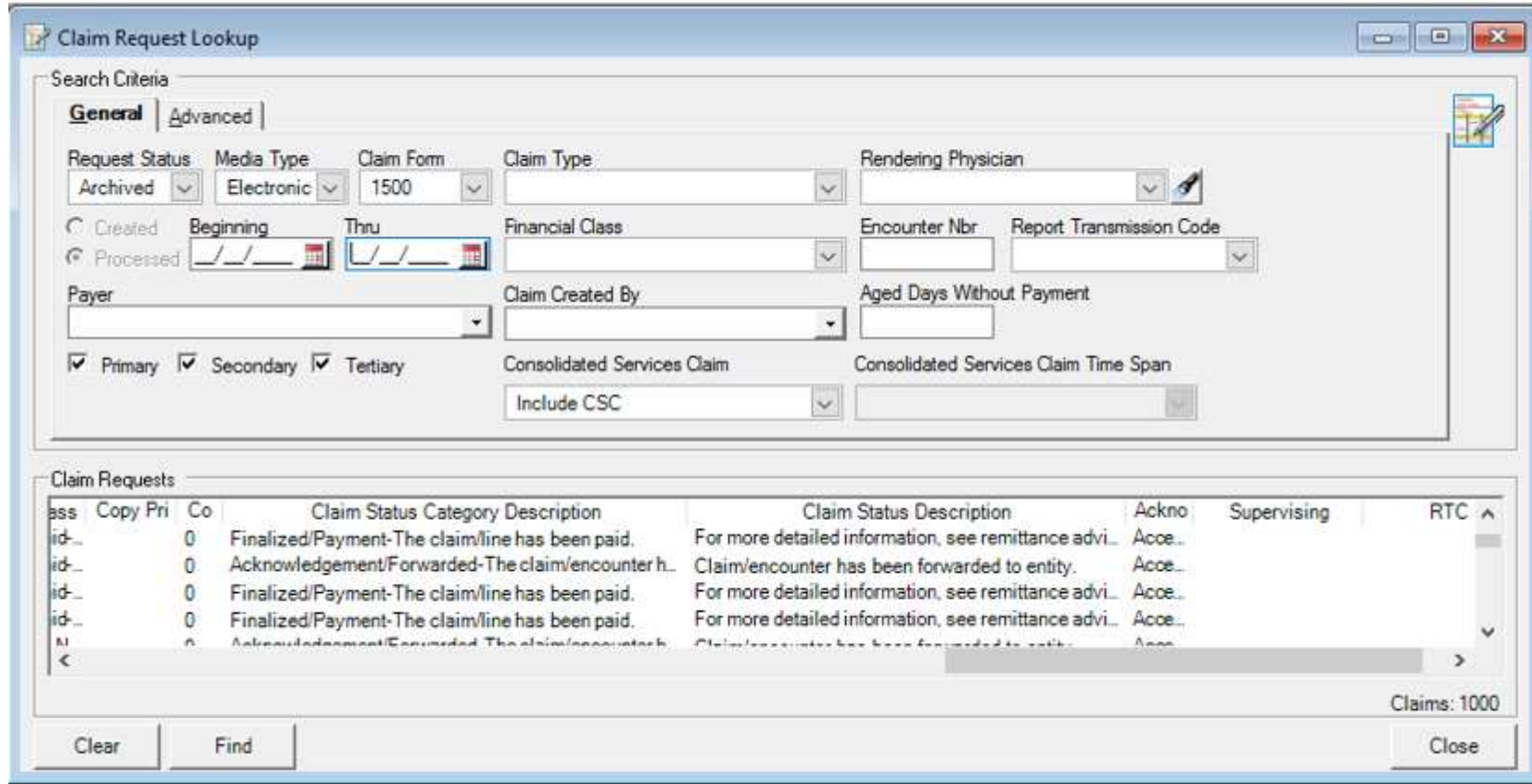
For more detailed information, see remittance advice.
 For more detailed information, see remittance advice.
 Entity acknowledges receipt of claim/encounter.
 Entity acknowledges receipt of claim/encounter.
 Entity acknowledges receipt of claim/encounter.
 Missing or invalid information.
 Claim/encounter has been forwarded to entity.

◀ [Ack Status](#)

Accepted
 Accepted
 Accepted
 Accepted
 Accepted
 Accepted
 Accepted

277/999 File Imported Displayed

- Archived Electronic Claims Lookup



Claim Request Lookup

Search Criteria

General | Advanced

Request Status: Archived | Media Type: Electronic | Claim Form: 1500 | Claim Type: | Rendering Physician: |

Created: | Processed: Beginning Thru | Financial Class: | Encounter Nbr: | Report Transmission Code: |

Payer: | Claim Created By: | Aged Days Without Payment: |

Primary Secondary Tertiary

Consolidated Services Claim: Include CSC | Consolidated Services Claim Time Span: |

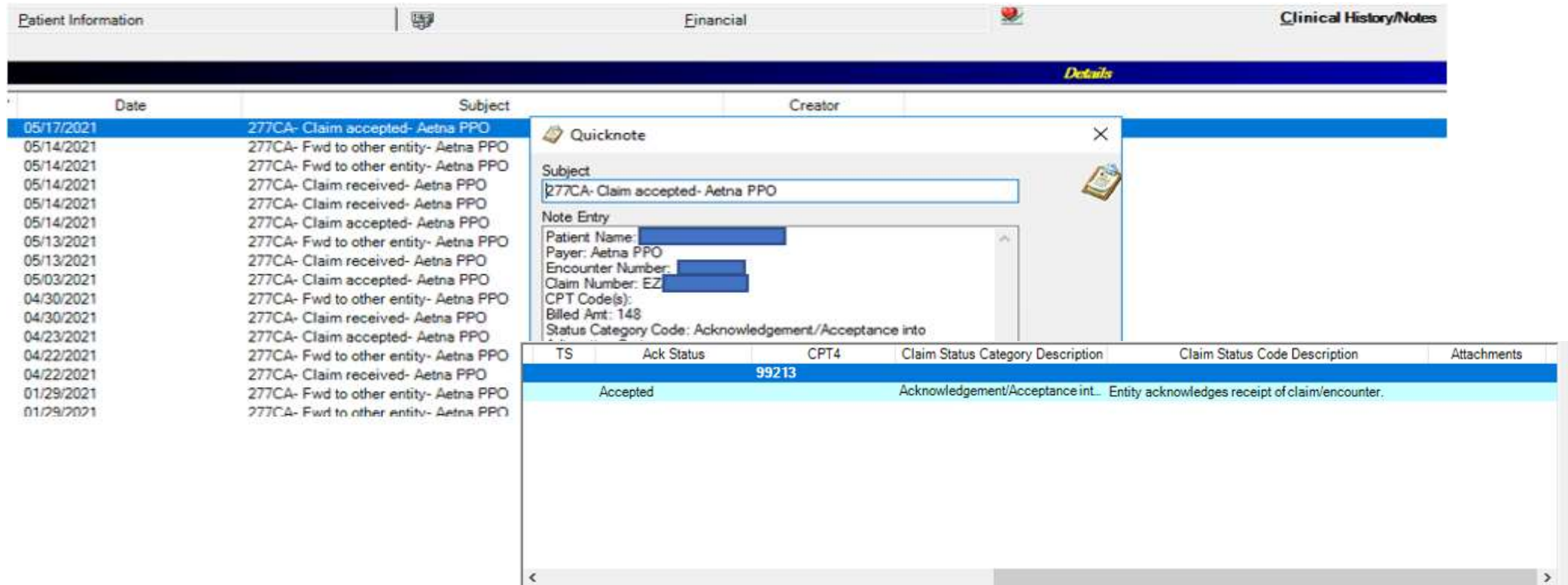
Ass	Copy	Pri	Co	Claim Status Category Description	Claim Status Description	Ackno	Supervising	RTC
id...		0		Finalized/Payment-The claim/line has been paid.	For more detailed information, see remittance advi...	Acce...		
id...		0		Acknowledgement/Forwarded-The claim/encounter h...	Claim/encounter has been forwarded to entity.	Acce...		
id...		0		Finalized/Payment-The claim/line has been paid.	For more detailed information, see remittance advi...	Acce...		
id...		0		Finalized/Payment-The claim/line has been paid.	For more detailed information, see remittance advi...	Acce...		
id...		0		Acknowledgement/Forwarded-The claim/encounter h...	Claim/encounter has been forwarded to entity.	Acce...		

Claims: 1000

Clear Find Close

277/999 File Imported Displayed

- Clinical History Notes Tab
- If Set in Practice Preferences this can be Displayed as an Encounter Note
- From the Claim Request Window



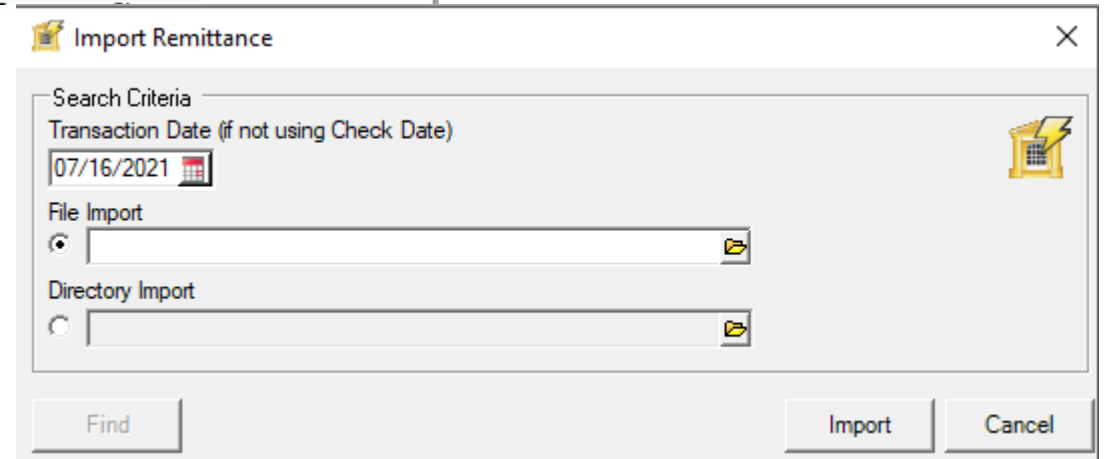
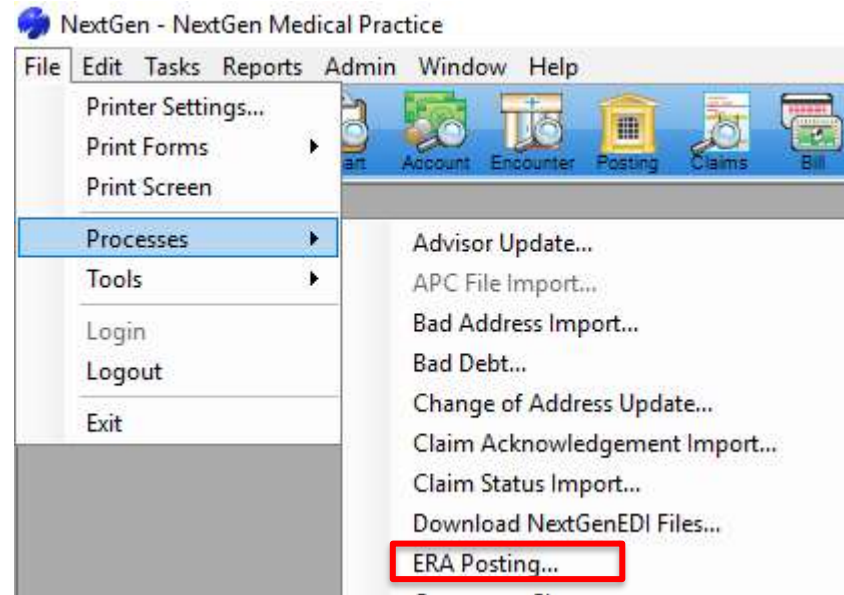
The screenshot displays a software interface with a 'Clinical History/Notes' tab. A table lists claim entries with columns for Date, Subject, and Creator. A 'Quicknote' window is open, showing details for a claim accepted on 05/17/2021. The note entry includes fields for Patient Name, Payer (Aetna PPO), Encounter Number, Claim Number (EZ), CPT Code(s), Billed Amt (148), and Status Category Code (Acknowledgement/Acceptance into).

Date	Subject	Creator
05/17/2021	277CA- Claim accepted- Aetna PPO	
05/14/2021	277CA- Fwd to other entity- Aetna PPO	
05/14/2021	277CA- Fwd to other entity- Aetna PPO	
05/14/2021	277CA- Claim received- Aetna PPO	
05/14/2021	277CA- Claim received- Aetna PPO	
05/14/2021	277CA- Claim accepted- Aetna PPO	
05/13/2021	277CA- Fwd to other entity- Aetna PPO	
05/13/2021	277CA- Claim received- Aetna PPO	
05/03/2021	277CA- Claim accepted- Aetna PPO	
04/30/2021	277CA- Fwd to other entity- Aetna PPO	
04/30/2021	277CA- Claim received- Aetna PPO	
04/23/2021	277CA- Claim accepted- Aetna PPO	
04/22/2021	277CA- Fwd to other entity- Aetna PPO	
04/22/2021	277CA- Claim received- Aetna PPO	
01/29/2021	277CA- Fwd to other entity- Aetna PPO	
01/29/2021	277CA- Fwd to other entity- Aetna PPO	

TS	Ack Status	CPT4	Claim Status Category Description	Claim Status Code Description	Attachments
	Accepted	99213	Acknowledgement/Acceptance into...	Entity acknowledges receipt of claim/encounter.	

PM ERA Import

- File > Process ERA Posting
- Browse to find the File or Directory Import



ERA Import

- Set the Source Directory to get the ERA file from
- Export the Report to a Shared folder

The screenshot shows the 'Job Properties' dialog box for an 'ERA Import' job. The job is configured with the following settings:

- Job number: 1
- Job name: ERA Import
- Job type: ERA Directory Import
- Run as practice: NextGen Medical Practice
- Upon completion: Do not notify
- Notification e-mail: (empty)
- Available NextGen Users and Groups: <Click to select Mail Recipient(s)>
- On success / failure flow: Enabled?
- If job succeeds, then: Go to the next job
- If job fails, then: Quit package as failure

The 'Settings' tab is active, showing a table of configuration options:

Setting Name	Value
Source Directory	
Secure Batch To	
Import Posting Report: Printer Name	
Import Posting Report: Export Format	Excel
Import Posting Report: Export File Name	
Import Posting Report: Export Overwrite Option	
Import Posting Report: E-mail Export File To	
Import Posting Report: Save Snapshot	No
Import Posting Report: Snapshot Name	
Move Successful Files	

At the bottom of the dialog, there are two checkboxes:

- Run this job in debug mode (PM-related jobs only)
- Log all SQL for this job (PM-related jobs only)

The dialog includes 'OK' and 'Cancel' buttons.

Create Folders For Files to Archive

- Create Folders and Map
 - Successful Files
 - Failed Files
 - Partially Processed Files

- Can Create a Snapshot for review prior to Posting

Job Properties

Job number: 1

Job name: ERA Import

Job type: ERA Directory Import

Run as practice: NextGen Medical Practice

Upon completion: Do not notify

Notification e-mail: (separated by commas)

Available NextGen Users and Groups: <Click to select Mail Recipient(s)>

On success / failure flow

If job succeeds, then: Go to the next job

If job fails, then: Quit package as failure

Enabled?

Settings

Setting Name	Value
Import Posting Report: Export Overwrite Option	
Import Posting Report: E-mail Export File To	
Import Posting Report: Save Snapshot	No
Import Posting Report: Snapshot Name	
Move Successful Files	
Move Failed Files	
Move Partially Processed Files	
Job runtime alert setting (minutes):	
Job runtime alert email:	

Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

PM Unapplied Encounter Credits

- File > Process Unapplied Encounter Credits

NextGen - NextGen Medical Practice

File Edit Tasks Reports Admin Window Help

Printer Settings...
Print Forms
Print Screen

Processes
Tools
Login
Logout
Exit

Unapplied Encounter Credits

Filter Criteria
Encounter Location: [Dropdown] Encounter Rendering: [Dropdown] Include Transactions: [Dropdown] Encounter date range: From [01/01/1900] To [07/16/2021]

Process encounters where pat amt = unapplied amt Process unapplied with patient balance View unapplied with no patient balance

Unapplied Encounters List	Patient	Enc Nbr	Location	Enc Rendering	Trans Proce	Trans Code	Unapp Am	Chg Amt	Pat Amt	Prim
<input checked="" type="checkbox"/>					04/09/2007		-\$20.00	\$145.00	\$20.00	
<input checked="" type="checkbox"/>	Adler, Grace	2320	Westside Medical...	Watson MD, Steve	12/09/2020	Copay Cash	-\$20.00	\$100.00	\$20.00	BCBS (

Total Unapplied Amount: \$40.00 Records Found: 2

Clear Find

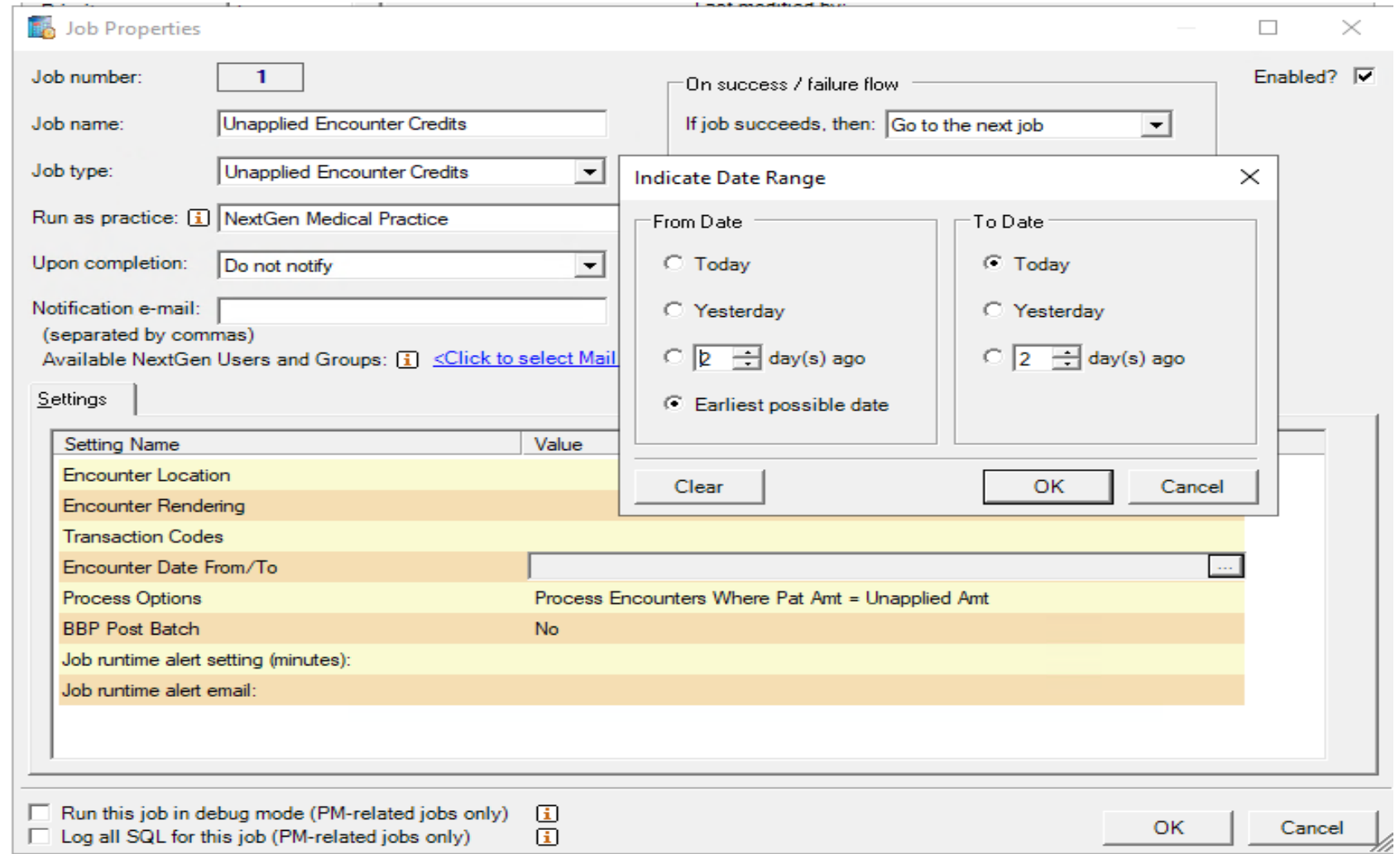
Encounters with unposted transactions will not show in this window.
To refresh any changes made, click on the Find button.

Post BBP

Process Close

Unapplied Encounter Credits

- Set your Date Range
- Set one Job for Process Encounters Where Pat Amt = Unapplied
- Set another Job for Process Unapplied With Patient Balance
- Can choose to Automatically Indicate to Post on the BBP



The screenshot shows the 'Job Properties' dialog box for a job named 'Unapplied Encounter Credits'. The job number is 1, and it is configured to run as 'NextGen Medical Practice'. The 'On success / failure flow' is set to 'Go to the next job'. An 'Indicate Date Range' sub-dialog is open, showing options for 'From Date' and 'To Date'. Both are set to 'Earliest possible date'. The 'Settings' section includes a table of job settings.

Setting Name	Value
Encounter Location	
Encounter Rendering	
Transaction Codes	
Encounter Date From/To	
Process Options	Process Encounters Where Pat Amt = Unapplied Amt
BBP Post Batch	No
Job runtime alert setting (minutes):	
Job runtime alert email:	

At the bottom, there are checkboxes for 'Run this job in debug mode (PM-related jobs only)' and 'Log all SQL for this job (PM-related jobs only)', both currently unchecked.

Month End Reports

- Memorize all the desired Month End Reports using Last Month on Filter 1
- Charges, Payments, and Adjustment Reports should be run using Process Date for balancing purposes
- Create a Job for each Report needed

Job Properties

Job number: 1

Job name: Month End Reports

Job type: Memorized Reports

Run as practice: NextGen Medical Practice

Run using: Report Server

Upon completion: Do not notify

Notification e-mail: (separated by commas)

Available NextGen Users and Groups: <Click>

On success / failure flow

If job succeeds, then: Go to the next job

If job fails, then: Quit package as failure

Enabled?

Settings

Setting Name	
Memorized Report Name	
Printer Name	
Export Format	
Export File Name	
Export Overwrite Option	
E-mail Export File To	
Save Snapshot	No
Snapshot Name	

Memorized Reports

Report Type: Standard Monthly Closing

Description: Adjustments By Reason

Adjustments By Reason

Aged Trial Balance By Loc/Prov

Monthly Activity By Loc/Prov

Monthly Payments - MK

Monthly Payments KGW

Payment By Day (Bank Rec)

Add a timestamp to the file name (filename_yyyymmddhhmmss.ext)

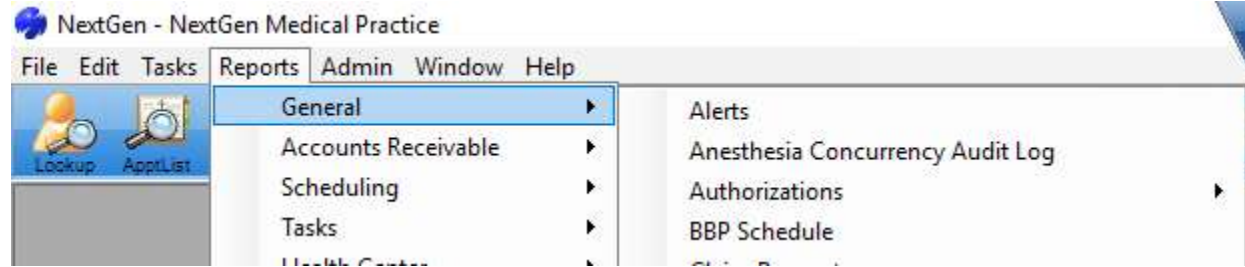
Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

OK Cancel

BBP Performance Reporting

- Troubleshoot / Monitor BBP Packages



- Can use to review how long Jobs are taking to Run

NextGen Report Filter: BBP Schedule

Settings List

Columns

Filter 1

Filter 2

Sorting

Totals

Include the following columns on the report

Column Name	Description
<input checked="" type="checkbox"/> Server name	Server Name
<input checked="" type="checkbox"/> Package Name	Package Name
<input checked="" type="checkbox"/> Package Run Date	Package Run Date
<input checked="" type="checkbox"/> Package Scheduled Date	Package Scheduled Date
<input checked="" type="checkbox"/> Package Run Duration	Package Run Duration
<input checked="" type="checkbox"/> Package Result	Package Result
<input type="checkbox"/> Job #	Job Number
<input type="checkbox"/> Job Name	Job Name
<input type="checkbox"/> Job Type Code	Job Type Code
<input type="checkbox"/> Job Type	Job Type
<input checked="" type="checkbox"/> Job Run Duration	Job Run Duration
<input type="checkbox"/> Job Result	Job Result
<input type="checkbox"/> Cr. Dt.	Create Date
<input checked="" type="checkbox"/> Exit Code	Exit Code
<input checked="" type="checkbox"/> Exit Description	Exit Description
<input checked="" type="checkbox"/> Items Processed	Items Processed
<input checked="" type="checkbox"/> Seconds Per Item	Seconds Per Item

Settings List

Columns

Filter 1

Filter 2

Sorting

Totals

Include records that meet the following conditions

Create Date

Scheduled Date Last Week 05/23/2021 05/29/2021

Server name	Package Name	Package Run Date	Package Scheduled Date	Package Run Duration	Package Result	Job Name	Job Run Duration	Job Result	Exit Code	Exit Description	Items Processed	Seconds Per Item
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P	00:00:15	Failed	Billing & Print Paper Claims	00:00:15	Failed	0		0	0
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P			Bill Encounters	00:00:08	Succeeded	0	Job 1 completed successfully.	0	0
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P			Print Pending Claims	00:00:06	Failed	76	Path not found	0	0
NG649	Billing & Print Paper Claims	04/10/07 4:54 P	04/10/07 4:53 P	00:00:21	Succeeded	Billing & Print Paper Claims	00:00:21	Succeeded	0		0	0
NG649	Billing & Print Paper Claims	04/10/07 4:54 P	04/10/07 4:53 P			Report	00:00:21	Succeeded	0	Job 3 completed successfully.	1	21
NG649	Billing & Print Paper Claims	04/10/07 5:08 P	04/10/07 5:07 P	00:00:04	Succeeded	Billing & Print Paper Claims	00:00:04	Succeeded	0		0	0

Options HeadFoot Save OK Cancel

Server name	Package Name	Package Run Date	Package Scheduled Date	Package Run Duration	Package Result	Job Name	Job Run Duration	Job Result	Exit Code	Exit Description	Items Processed	Seconds Per Item
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P	00:00:15	Failed	Billing & Print Paper Claims	00:00:15	Failed	0		0	0
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P			Bill Encounters	00:00:08	Succeeded	0	Job 1 completed successfully.	0	0
NG649	Billing & Print Paper Claims	04/10/07 2:35 P	04/10/07 2:34 P			Print Pending Claims	00:00:06	Failed	76	Path not found	0	0
NG649	Billing & Print Paper Claims	04/10/07 4:54 P	04/10/07 4:53 P	00:00:21	Succeeded	Billing & Print Paper Claims	00:00:21	Succeeded	0		0	0
NG649	Billing & Print Paper Claims	04/10/07 4:54 P	04/10/07 4:53 P			Report	00:00:21	Succeeded	0	Job 3 completed successfully.	1	21
NG649	Billing & Print Paper Claims	04/10/07 5:08 P	04/10/07 5:07 P	00:00:04	Succeeded	Billing & Print Paper Claims	00:00:04	Succeeded	0		0	0

Q&A