

Welcome to the PM Hidden Gems in NextGen

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.

Presented by:









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

Questions 

Show Answered Questions

X	Question ▲	Asker	Rec'd		Answer

 Send Privately  Send to All 



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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

About Our Presenter

About our Presenter

Alice Phillips

Meet Alice Phillips. Alice brings a wide range of NextGen skills to the table. She is a Certified NextGen Professional and has extensive experience in training, implementation, and go-live support for the NextGen Practice Management application.

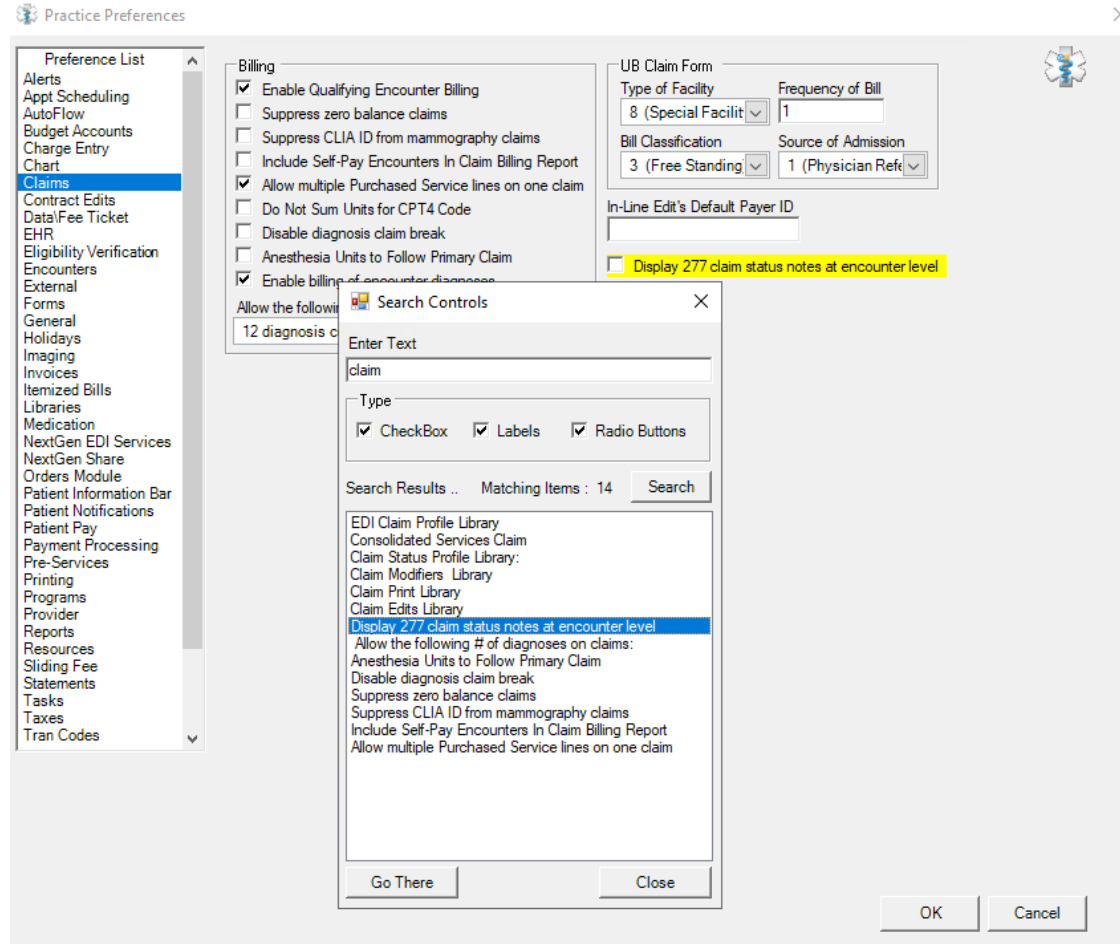
In her spare time Alice enjoys, spending time with her pets , arts and crafts and spending time with family and friends.



PM HIDDEN GEMS

Search Function in Practice Preferences

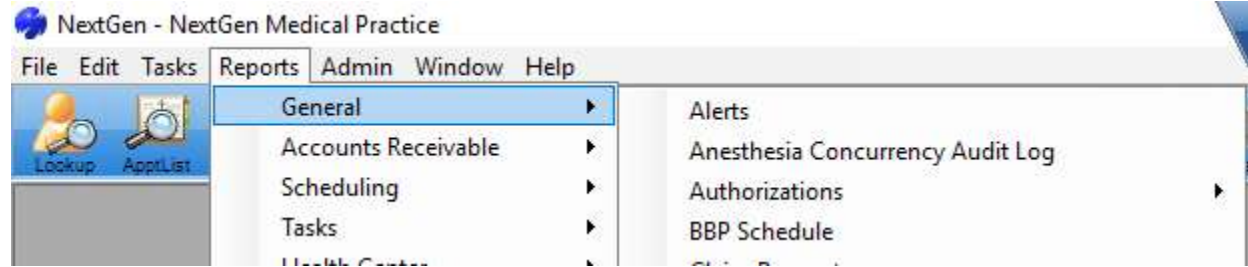
- Use CNTL & ALT & F to bring up a search Text Box
- System will return with a list of items that meet the criteria
- Can double click and the system will take you to that information



The screenshot shows the 'Practice Preferences' dialog box with a 'Search Controls' overlay. The 'Search Controls' dialog has an 'Enter Text' field containing 'claim', a 'Type' dropdown, and checked options for 'CheckBox', 'Labels', and 'Radio Buttons'. Below the search field, it shows 'Search Results .. Matching Items : 14' and a list of items. The item 'Display 277 claim status notes at encounter level' is highlighted in blue. The 'Practice Preferences' dialog in the background has a 'Display 277 claim status notes at encounter level' checkbox that is also highlighted in yellow. The 'Preference List' on the left includes 'Claims' which is selected.

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

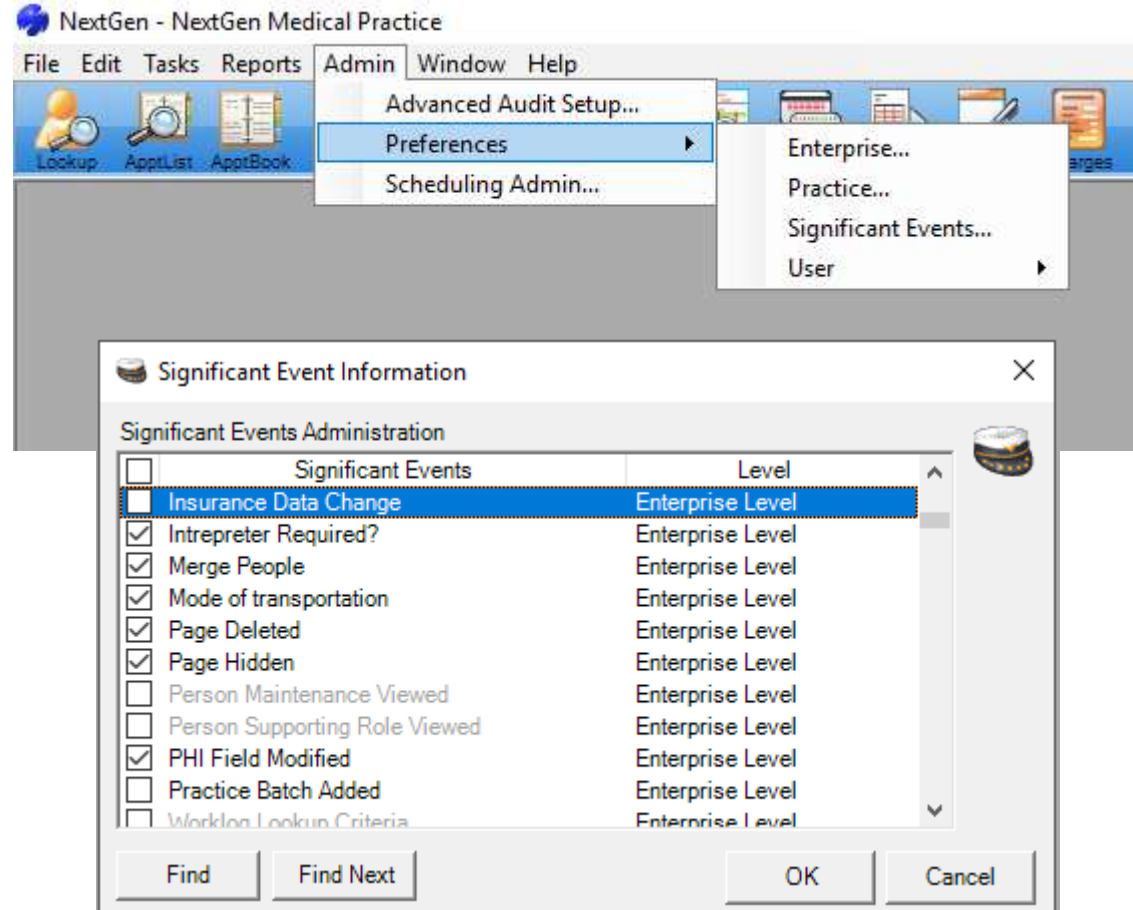
Scheduled Date: Last Week, 05/23/2021, 05/29/2021

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

Review Significant Events Enabled

- With new releases, NextGen has added some new Significant Events
- Review to confirm that you are tracking all of the desired items



- Insurance Data Changed only works with OCR

Reviewing Significant Events

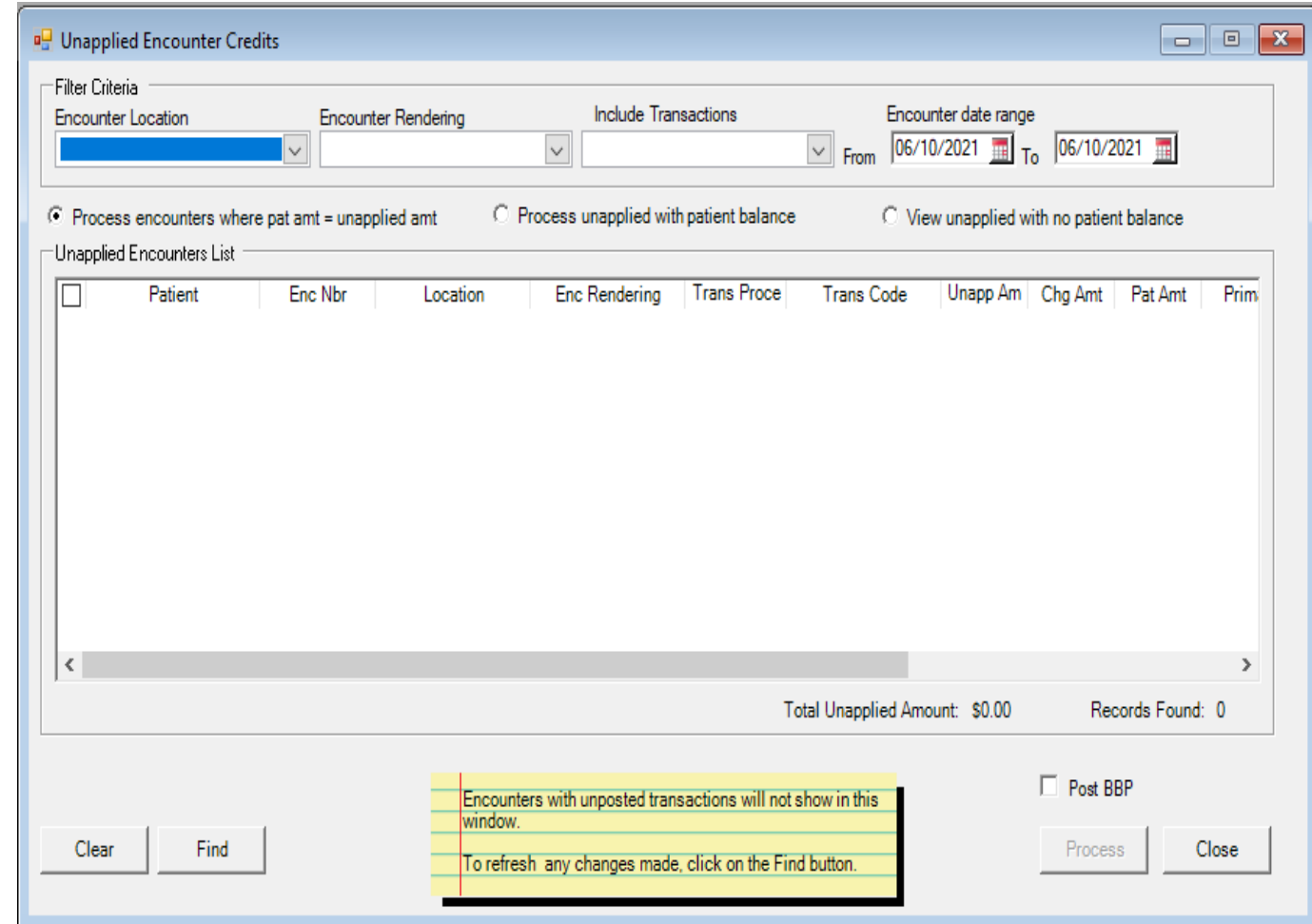
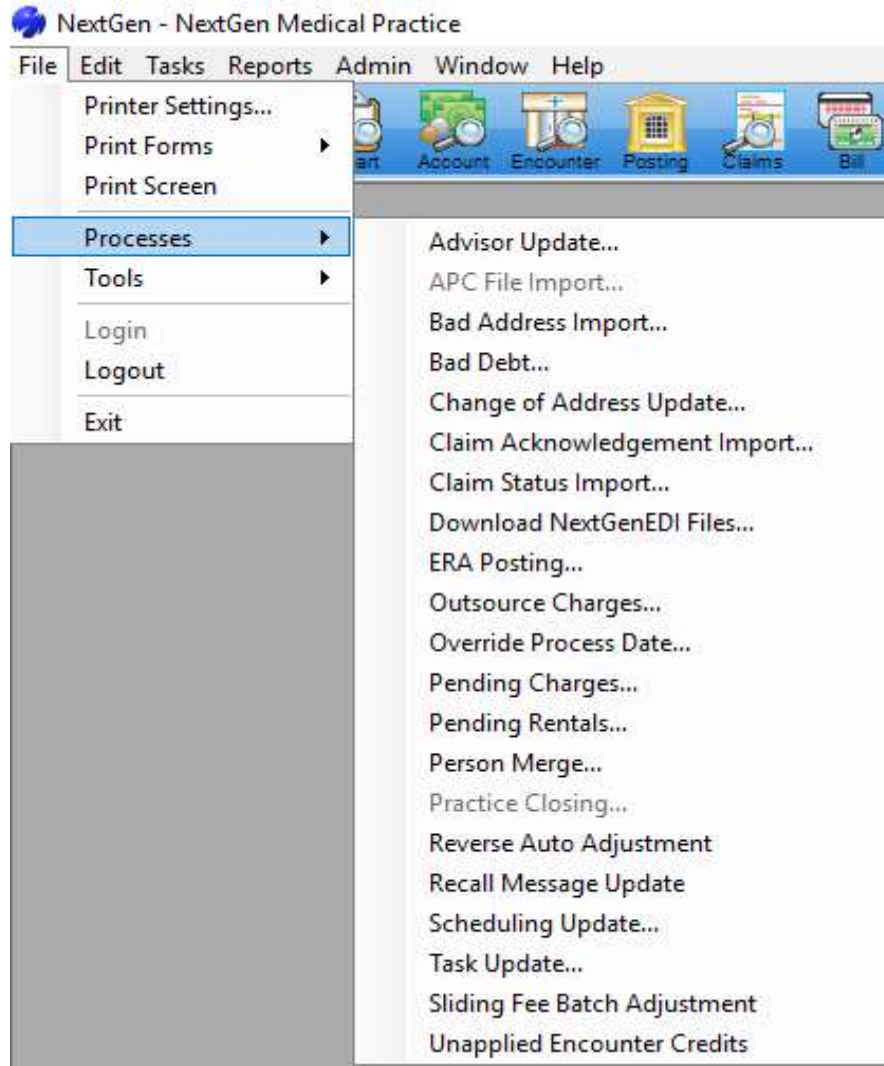
- With Significant Events Enabled you are able to track the “footprints” of what has occurred on an encounter
- Expand History then Expand Encounters
- Highlight the Encounter you would like to review to narrow down the results

The screenshot displays a medical software interface with the following components:

- Navigation Tabs:** Patient Information, Financial, Clinical History/Notes.
- Left Sidebar:** Clinical History/Chart Notes, Topics, Details, Vitals, Chart Notes, Alerts (5), Appointments (70), Authorization Results, Collections, Claim Status Result, Eligibility Results, Estimation Results, Forms, Medical Necessity, History (734), Encounters.
- Main Table:** A table with columns: Date/Time, Creator, and Description. It lists various events such as 'Encounter accessed', 'Balance Control Change', 'Charge Narrative Changed', and 'Encounter Status Change'.
- History Dialog Box:** A pop-up window titled 'History' showing details for a selected event: 'Encounter Insurance Re-Ordered - 1304'. It includes a 'Subject' field and a 'Note Entry' section with 'Before: <none>' and 'After: Medicare - COB: 1'.

Working Unapplied Encounter Credits

- Three different Scenarios available to work



Working Unapplied Encounter Credits

- View Unapplied with no patient balance.
- Will need to research how to properly handle this money

Unapplied Encounter Credits

Filter Criteria

Encounter Location: [Dropdown] Encounter Rendering: [Dropdown] Include Transactions: [Dropdown] Encounter date range: From [Date] To [Date]

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

Unapplied Encounters List

<input type="checkbox"/>	Patient	△ Enc Nbr	Location	Enc Rendering	Trans Proce	Trans Code	Unapp Am	Chg Amt	Pat Amt	Prim
<input type="checkbox"/>	Patient, Test A	21	Westside Medical...	Watson MD, Steve	08/05/2020	Copay Cash	-\$5.00	\$76.00	\$0.00	BCBS C
<input type="checkbox"/>	Lind, Louise	144	Westside Medical...	Baker MD, Michael	11/05/2007	Patient Cash Paym...	-\$10.00	\$100.00	\$0.00	Aetna H
<input checked="" type="checkbox"/>	Baruah, Vern	295	Westside Medical...	Goodby MD, James	11/05/2007	Patient Cash Paym...	-\$10.00	\$0.00	\$0.00	Aetna U
<input type="checkbox"/>	Hanson, Richard			Me... Smith MD, John	11/05/2007	Copay Check	-\$77.00	\$117.00	\$0.00	Anthem
<input type="checkbox"/>	Test, Case Managem.			Smith MD, John	05/13/2016	Copay Cash	-\$35.00	\$443.85	-\$88.77	WC Ge
<input type="checkbox"/>	Test, Father			Anderson MD, Barry	06/10/2021	Copay Cash	-\$25.00	\$105.00	\$0.00	Aetna U
<input type="checkbox"/>	Test, Daffy Duck			Me... Test MD, EMedApps	11/19/2020	Copay Cash	-\$25.00	\$0.00	\$0.00	Medica

Total Unapplied Amount: \$187.00 Records Found: 7

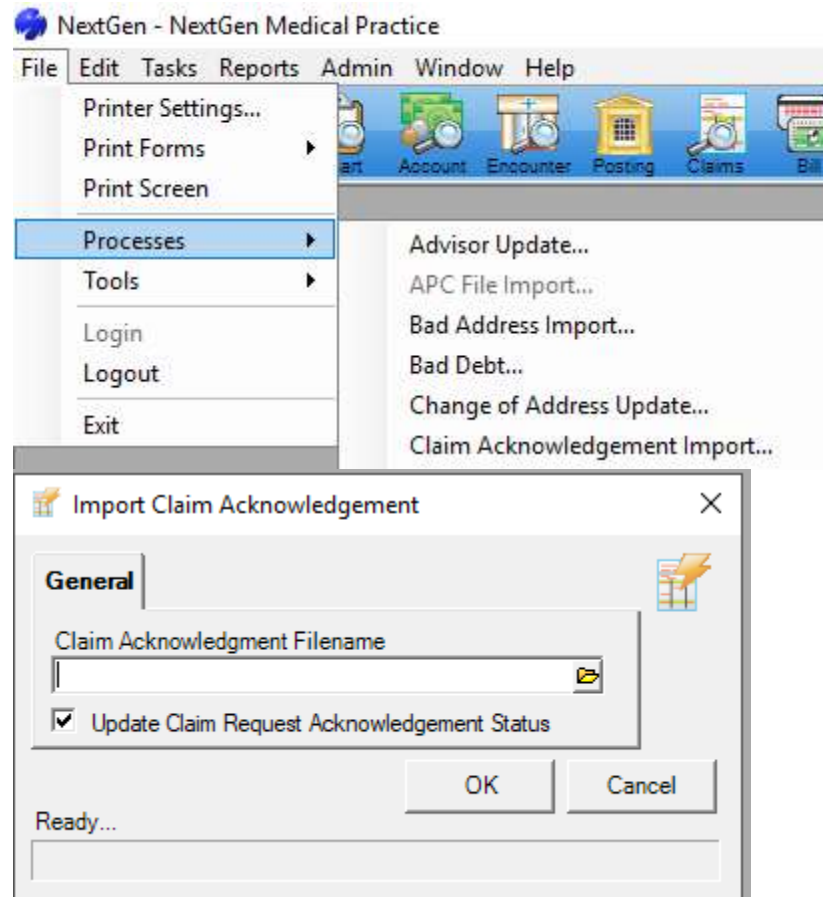
Post BBP

Clear Find Process Close

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

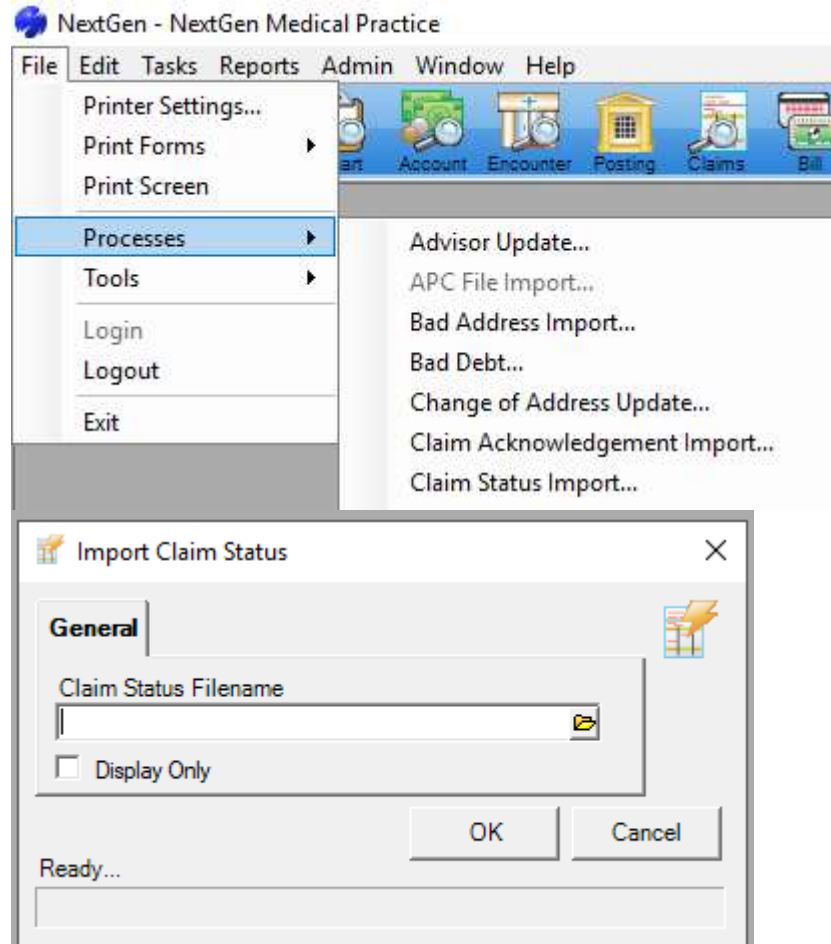
Import 997/999 EDI Files

- Your Clearinghouse is returning a 999 File for every 837 batch uploaded. This is the status of the Structure of your 837 File.
- Download from the Clearinghouse and Import into NextGen
- Leaving the Checkmark will update Encounters with information.
- Unchecking will display in a Report Only



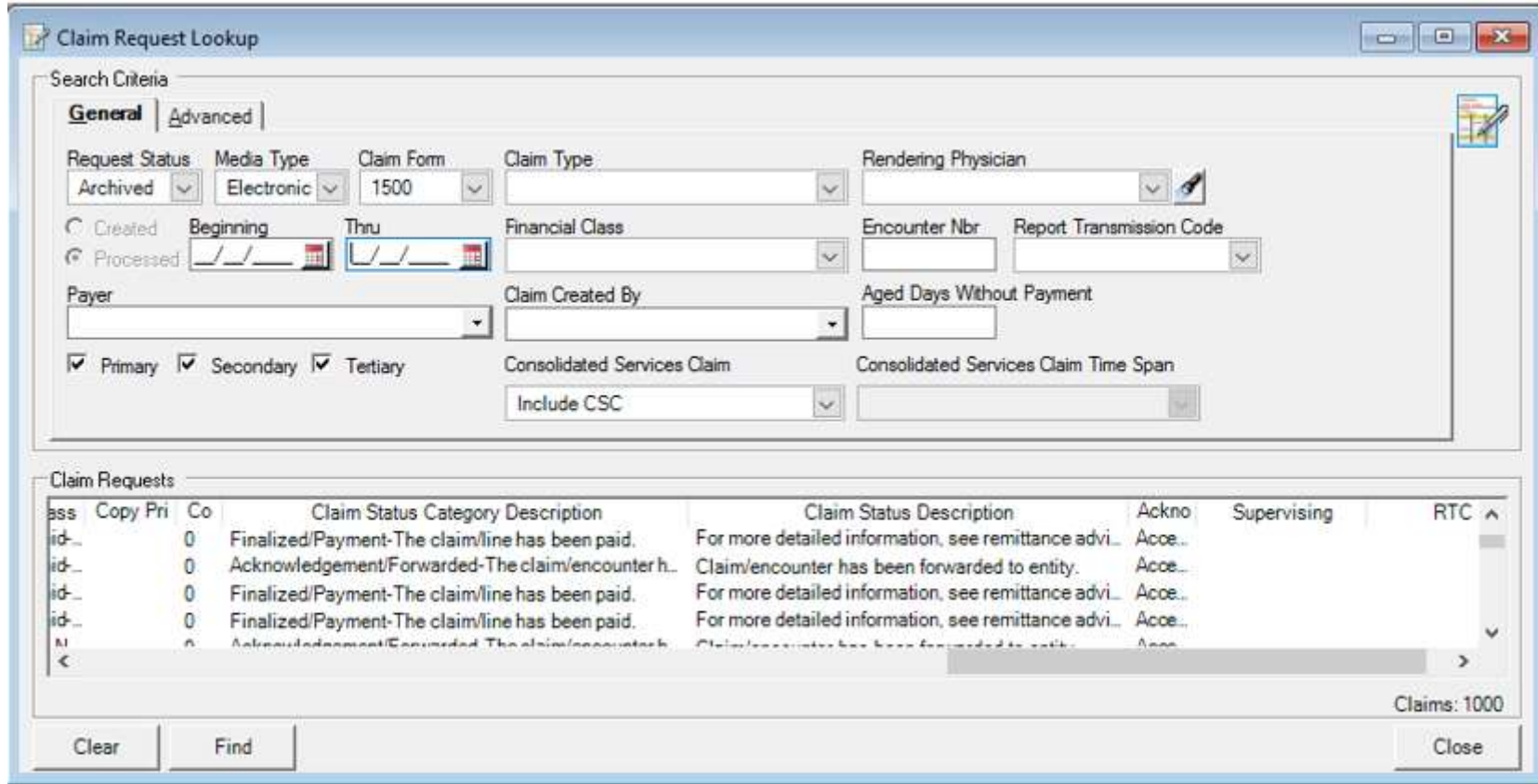
Import 277 EDI Files

- Your Payers send back Claim Status Information
- Download from the Clearinghouse and Import into NextGen
- Leaving the checkmark will update the encounter with the Status.
- Check the box to display Information in a Report Only



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

Processed: | | | | | |

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

Primary Secondary Tertiary

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

Claim Requests

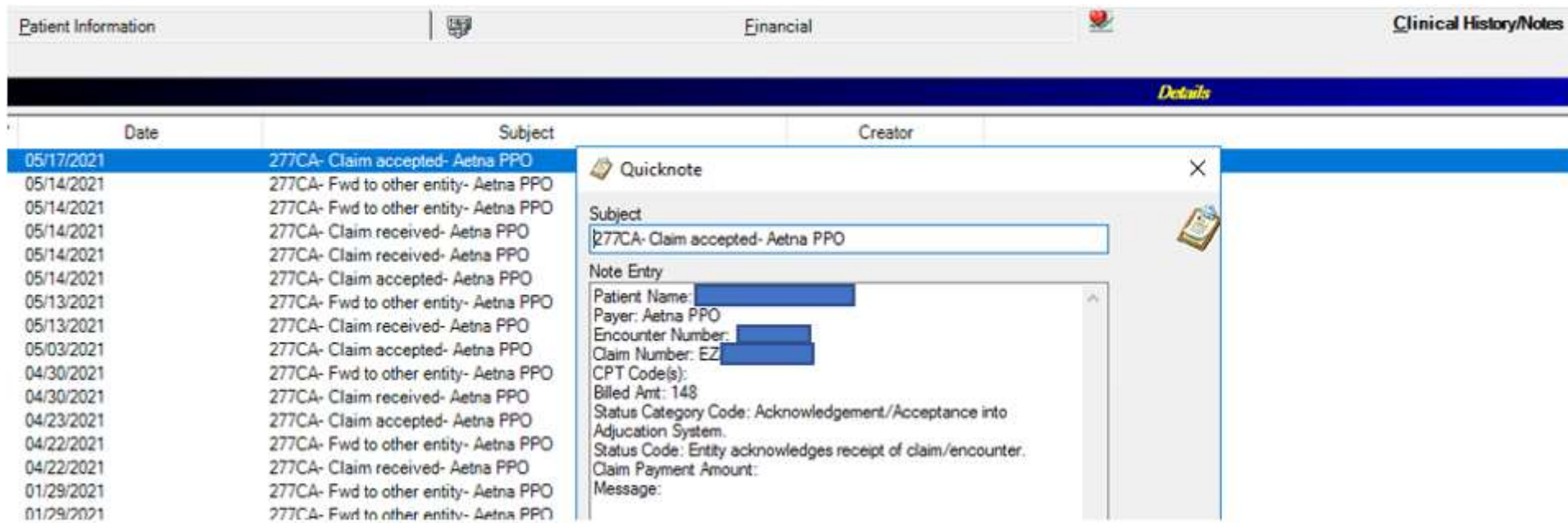
Class	Copy	Pri	Co	Claim Status	Category	Description	Claim Status Description	Ackno	Supervising	RTC
id...	0			Finalized/Payment		The claim/line has been paid.	For more detailed information, see remittance advi...	Acce...		
id...	0			Acknowledgement/Forwarded		The claim/encounter h...	Claim/encounter has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



The screenshot displays a software interface with a top navigation bar containing 'Patient Information', 'Financial', and 'Clinical History/Notes'. Below this is a table with columns for 'Date', 'Subject', and 'Creator'. A 'Quicknote' window is open over the table, showing a 'Subject' field with the text '277CA- Claim accepted- Aetna PPO' and a 'Note Entry' field containing the following text:

Patient Name: [REDACTED]
Payer: Aetna PPO
Encounter Number: [REDACTED]
Claim Number: EZ [REDACTED]
CPT Code(s):
Billed Amt: 148
Status Category Code: Acknowledgement/Acceptance into Adjudication System.
Status Code: Entity acknowledges receipt of claim/encounter.
Claim Payment Amount:
Message:

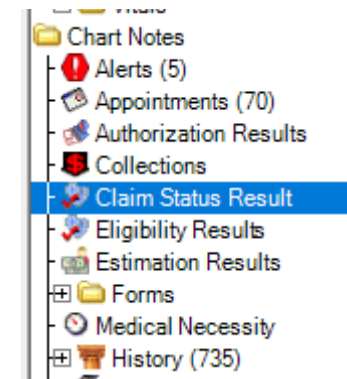
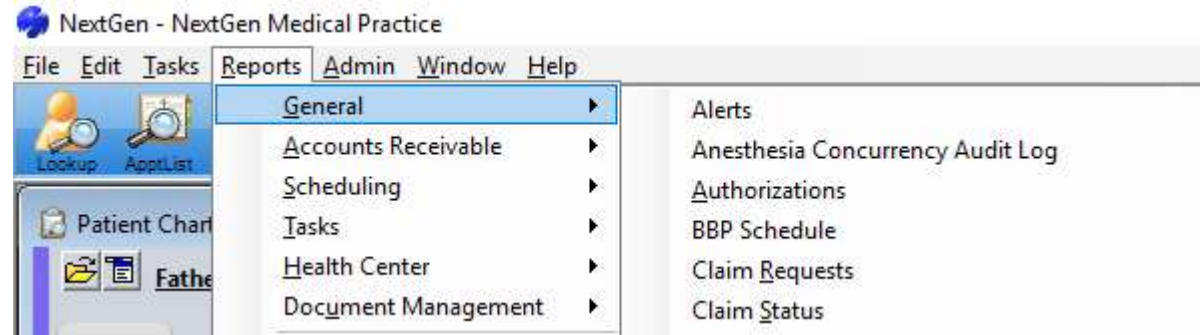
277/999 File Imported Displayed

- Claim Request Window

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

Claim Status Added in Chart

- New Claim Status Report Added
- Claim Status Summary on Encounter Tab in the Patient Chart
- Claim Status Result Topic added to the Clinical History Notes Tab



Filter Options In Chart

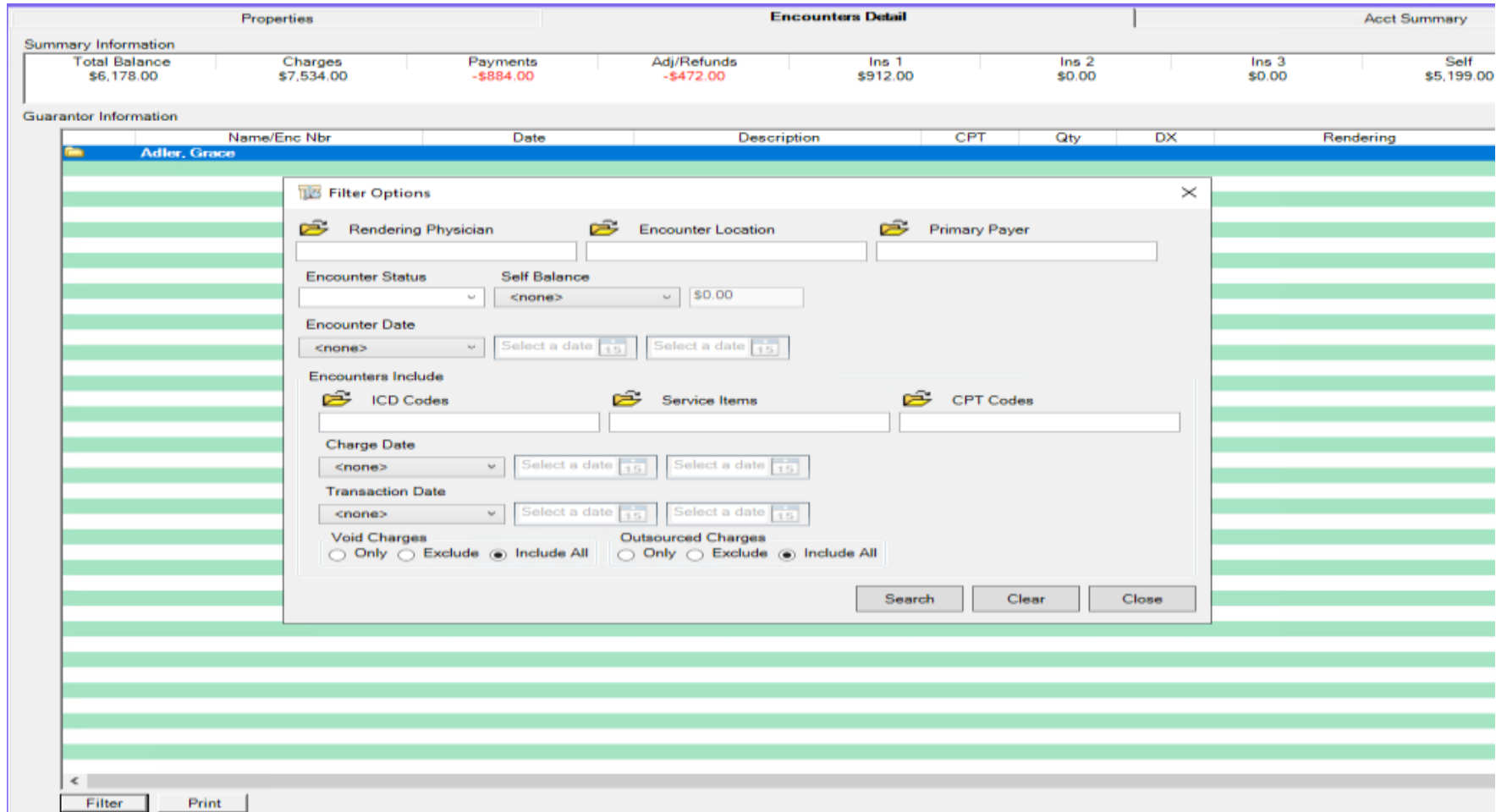
- Option Available in the Chart on Financial Tab

The screenshot shows a software interface with a 'Financial' tab. A table of financial information is visible, with columns for Date, Encounter Nb, Charges, Payments, Adj/Refund, and various insurance types (Ins 1, Ins 2, Ins 3, Self, Bad Debt, Outsource, Case, Patient Type, Ln Ite). A 'Filter Options' dialog box is open, allowing users to filter the data. The dialog box includes fields for Rendering Physician, Encounter Location, Primary Payer, Encounter Status, Self Balance, Patient Type, Encounter Date, Case, ICD Codes, Service Items, CPT Codes, Charge Date, Transaction Date, and radio buttons for Void Charges and Outsourced Charges.

Date	Encounter Nb	Charges	Payments	Adj/Refund	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Outsource	Outsource	Case	Patient Type	Ln Ite
05/27/2021	2733													
05/12/2021	2719													
04/06/2021	2700													
04/06/2021	2694													
04/05/2021	2693													
04/05/2021	2691													
02/26/2021	2637													
02/19/2021	2630													
12/03/2020	2564													
11/25/2020	2559													
11/12/2020	2556													
11/11/2020	2554													
11/10/2020	2552													
11/09/2020	2550													
10/23/2020	2547													
10/20/2020	2542													
09/22/2020	2526													
07/15/2020	2486													
06/26/2020	2469													
05/21/2020	2447	\$245.00												
03/26/2020	2365	\$150.00												
03/10/2020	2349	\$150.00												
02/24/2020	2337	\$100.00												
02/12/2020	2323	\$280.00												
02/11/2020	2320	\$100.00												
01/28/2020	2304	\$100.00												
01/13/2020	2295	\$100.00												
01/10/2020	2290	\$100.00												
11/11/2019	2252	\$100.00												
10/29/2019	2236	\$100.00												
10/25/2019	2234													
10/02/2019	2202	\$100.00						\$100.00						
09/20/2019	2192	\$100.00						\$100.00						
08/28/2019	2176	\$95.00						\$95.00						
08/27/2019	2168	\$95.00						\$95.00						
08/01/2019	2131													
07/29/2019	2108													

Filter Options In Account

- Available in the Account on the Encounters Detail Tab



The screenshot displays the 'Encounters Detail' tab in a medical software interface. The interface is divided into three main sections: Properties, Encounters Detail, and Acct Summary. The 'Encounters Detail' section shows a table with columns for Name/Enc Nbr, Date, Description, CPT, Qty, DX, and Rendering. A 'Filter Options' dialog box is overlaid on the table, providing various filtering criteria.

Summary Information

Total Balance	Charges	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self
\$6,178.00	\$7,534.00	-\$884.00	-\$472.00	\$912.00	\$0.00	\$0.00	\$5,199.00

Guarantor Information

Name/Enc Nbr	Date	Description	CPT	Qty	DX	Rendering
Adler, Grace						

Filter Options

Rendering Physician:

Encounter Location:

Primary Payer:

Encounter Status:

Self Balance: \$0.00

Encounter Date:

Encounters Include

ICD Codes:

Service Items:

CPT Codes:

Charge Date:

Transaction Date:

Void Charges: Only Exclude Include All

Outsourced Charges: Only Exclude Include All

Buttons: Search, Clear, Close

Bottom navigation: Filter, Print

Print Itemized Bill

- Enter Desired Criteria and Select Search
- Click Print to Generate an Itemized Bill that meets criteria

Description	Date	Charges	Payments	Adj/ Refunds	Insurance Balance	Patient Balance	Total Balance
Patient Name Grace Adler							
Encounter 2447							
Provider Abbott MD, Matt IM							
Location Coastal Internal Medi...							
99213-Office outpatient visit,...	05/21/2020	\$150.00			\$0.00	\$0.00	\$0.00
ZBad Debt Credit Adj	07/09/2020		\$0.00	\$0.00			
ZBad Debt Debit Adj	07/09/2020		\$0.00	\$0.00			
Medicare Part B Adjustment	05/22/2020		\$0.00	-\$150.00			
99212-Office/outpatient visit,...	05/21/2020	\$95.00			\$0.00	\$0.00	\$95.00
ZBad Debt Credit Adj	07/09/2020		\$0.00	-\$95.00			
ZBad Debt Debit Adj	07/09/2020		\$0.00	\$95.00			
	Encounter Totals	\$245.00	\$0.00	-\$150.00	\$0.00	\$0.00	\$95.00
Encounter 2323							
Provider Anderson MD, Barry							
Location Coastal Internal Medi...							
99215-Office/outpatient visit,...	02/12/2020	\$110.00			-\$40.00	\$100.00	\$60.00
Medicare Part B Payment	12/10/2020		-\$150.00	\$0.00			
Refund - Patient	02/13/2020		\$0.00	\$100.00			
87880-Infect antigen, immuno, ...	02/12/2020	\$0.00			\$0.00	\$0.00	\$0.00
99385-Preventive checkup, new,...	02/12/2020	\$0.00			\$0.00	\$0.00	\$0.00
99385-Preventive checkup, new,...	02/12/2020	\$0.00			\$0.00	\$0.00	\$0.00
81000-Urinalysis, non-automate...	02/12/2020	\$10.00			\$10.00	\$0.00	\$10.00
81000-Urinalysis, non-automate...	02/12/2020	\$10.00			\$10.00	\$0.00	\$10.00
80050-General health panel	02/12/2020	\$35.00			\$35.00	\$0.00	\$35.00
80050-General health panel	02/12/2020	\$35.00			\$35.00	\$0.00	\$35.00
93000-Electrocardiogram (routi...	02/12/2020	\$40.00			\$40.00	\$0.00	\$40.00
93000-Electrocardiogram (routi...	02/12/2020	\$40.00			\$40.00	\$0.00	\$40.00
Copay Check	02/12/2020		-\$20.00	\$0.00			
	Encounter Totals	\$280.00	-\$170.00	\$100.00	\$130.00	\$100.00	\$210.00
Encounter 2320							
Provider Watson MD, Steve							
Location Westside Medical Offi...							
99213-Office outpatient visit,...	02/11/2020	\$100.00			\$80.00	\$20.00	\$100.00
Copay Cash	12/09/2020		-\$20.00	\$0.00			
	Encounter Totals	\$100.00	-\$20.00	\$0.00	\$80.00	\$20.00	\$80.00
Encounter 100							
Provider Jordan MD, John							
Location Westside Medical Offi...							

Archive Letters

- In Enterprise Preferences you can indicate the Letter types you would like to be archived

Enterprise Preferences

Preference List

- Autoflow Stored Procedure
- Client Defined
- Document Management
- External
- General**
- Libraries
- Protected Content
- Reporting
- UDS
- Vendor Labels

Provider Subgrouping 1	Provider Subgrouping 2	Reason Code Subgrouping 1	Reason Code Subgrouping 2
Test Providers Subgroup			
Location Subgrouping 1	Location Subgrouping 2	Payer Subgrouping 1	Payer Subgrouping 2
Contract Subgrouping 1	Contract Subgrouping 2	Diagnosis Subgrouping 1	Diagnosis Subgrouping 2
test contract subgroup			
Maximum image size in bytes	Self Pay Description	Task Subgrouping 1	Task Subgrouping 2
105500	Self Pay:	test task subgroup	
Loc Master Comment Caption	Enc Lock Interval	In-Line Edits Default Payer ID	National Provider ID
Directions To Site:	48		

Practice access for payer master file
 Practice access for provider master file
 EHR manual charge processing
 External manual charge processing
 Archive electronic send files
 Archive ERA files
 Encounter rate billing
 Enable enterprise patient alerts
 Enable enterprise patient balance alerts
 Birth Mother's full name on Relations Tab
 Enable batch transaction category field
 Caption

Archive Letters

ccount:Demand Encounter;Recall

- Appt Reminders
- Budget(all types)
- Demand Account
- Demand Encounter
- Recall
- Create tasks during claim edits
- Create tasks during billing process
- Archive claim status response files
- Edit demographic ext data across enterprise
- Enable Credit Card Processing

Enable Provider Credential Billing
 Enable Enterprise Batch Groupings
 Require Community Code
 Show DUR across enterprise
 Enable multiple co-pays
 Enroll patients in enterprise chart
 Enterprise case management
 Enterprise chart
 Enable multi-language for PM

Credit Card Processor	Enable?	User Name	Password	Merchant Phone #
InstaMed				
TSYS-Central				
TSYS-Express				

WhoWhen

OK Cancel

Archive Statements

- In Enterprise Preferences you can indicate the Statement types you would like to be archived

Enterprise Preferences

Preference List

- Autoflow Stored Procedure
- Client Defined
- Document Management
- External
- General**
- Libraries
- Protected Content
- Reporting
- UDS
- Vendor Labels

Provider Subgrouping 1	Provider Subgrouping 2	Reason Code Subgrouping 1	Reason Code Subgrouping 2
Test Providers Subgroup			
Location Subgrouping 1	Location Subgrouping 2	Payer Subgrouping 1	Payer Subgrouping 2
Contract Subgrouping 1	Contract Subgrouping 2	Diagnosis Subgrouping 1	Diagnosis Subgrouping 2
test contract subgroup			
Maximum image size in bytes	Self Pay Description	Task Subgrouping 1	Task Subgrouping 2
105500	Self Pay:	test task subgroup	
Loc Master Comment Caption	Enc Lock Interval	In-Line Edits Default Payer ID	National Provider ID
Directions To Site:	48		

Practice access for payer master file
 Practice access for provider master file
 EHR manual charge processing
 External manual charge processing
 Archive electronic send files
 Archive ERA files
 Encounter rate billing
 Enable enterprise patient alerts
 Enable enterprise patient balance alerts
 Birth Mother's full name on Relations Tab
 Enable batch transaction category field
 Caption:

Archive Letters

ccount:Demand Encounter;Recall

- Appt Reminders
- Budget(all types)
- Demand Account
- Demand Encounter
- Recall
- Create tasks during claim edits
- Create tasks during billing process
- Archive claim status response files
- Edit demographic ext data across enterprise
- Enable Credit Card Processing

Enable Provider Credential Billing
 Enable Enterprise Batch Groupings
 Require Community Code
 Show DUR across enterprise
 Enable multiple co-pays
 Enroll patients in enterprise chart
 Enterprise case management
 Enterprise chart
 Enable multi-language for PM

Credit Card Processor	Enable?	User Name	Password	Merchant Phone #
InstaMed				
TSYS-Central				
TSYS-Express				

WhoWhen

OK Cancel

Archive EDI Files

- In Enterprise Preferences you can Select to Archive EDI Files
- Never be at risk of losing your Files

Enterprise Preferences

Preference List

- Autoflow Stored Procedure
- Client Defined
- Document Management
- External
- General**
- Libraries
- Protected Content
- Reporting
- UDS
- Vendor Labels

Provider Subgrouping 1: Test Providers Subgroup

Provider Subgrouping 2:

Reason Code Subgrouping 1:

Reason Code Subgrouping 2:

Location Subgrouping 1:

Location Subgrouping 2:

Payer Subgrouping 1:

Payer Subgrouping 2:

Contract Subgrouping 1: test contract subgroup

Contract Subgrouping 2:

Diagnosis Subgrouping 1:

Diagnosis Subgrouping 2:

Maximum image size in bytes: 105500

Self Pay Description: Self Pay:

Task Subgrouping 1: test task subgroup

Task Subgrouping 2:

Loc Master Comment Caption: Directions To Site:

Enc Lock Interval: 48

In-Line Edits Default Payer ID:

National Provider ID:

Practice access for payer master file
 Practice access for provider master file
 EHR manual charge processing
 External manual charge processing
 Archive electronic send files
 Archive ERA files
 Encounter rate billing
 Enable enterprise patient alerts
 Enable enterprise patient balance alerts
 Birth Mother's full name on Relations Tab
 Enable batch transaction category field
 Enable Credit Card Processing

Archive Letters: Appt Reminders;Budget(all type:)

Archive Statements: Statement

Save med necessity requests in chart notes
 Archive claim acknowledgement files
 Create tasks during claim edits
 Create tasks during billing process
 Archive claim status response files
 Edit demographic ext data across enterprise

Enable Provider Credential Billing
 Enable Enterprise Batch Groupings
 Require Community Code
 Show DUR across enterprise
 Enable multiple co-pays
 Enroll patients in enterprise chart
 Enterprise case management
 Enterprise chart
 Enable multi-language for PM

Credit Card Processor	Enable?	User Name	Password	Merchant Phone #
InstaMed				
TSYS-Central				
TSYS-Express				

WhoWhen

OK Cancel

Archive EDI Files

- Access Archived Files
- Ability to Export the Files again if needed.

The screenshot displays the NextGen Medical Practice software interface. The 'File Archive Search' dialog is open, showing search criteria for '837 Electronic Claims File'. Below the search criteria is a table of search results. The 'Lookup' menu is also visible, listing various system functions.

File Archive Search

Search Criteria

File Type: 837 Electronic Claims File (selected)

Submitter Profile: [Empty]

Name: [Empty]

NextGenEDI Files

	Form	Batch Type	Amount	Claims	Created By	Create Date
P4	Medicare	1500	Prod	\$105.00	1 Anderson, Betsy	09/21/17 3:39 P
NAV101507no1.txt	Navicare	1500	Prod	\$225.00	2 Admin, NextGen	10/15/07 1:45 P
NAV040907no2.txt	Medicare	1500	Prod	\$190.00	1 Schaeffer, Linda	04/09/07 4:48 A
NAV040907no2.txt	Navicare	1500	Prod	\$1,355.00	9 Schaeffer, Linda	04/09/07 4:37 A
NAV040907no1.txt	Medicare	1500	Prod	\$913.00	3 Schaeffer, Linda	04/09/07 4:37 A
NAV040907no1.txt	Navicare	1500	Prod	\$1,096.00	6 Schaeffer, Linda	04/09/07 3:25 A
NAV040116no1.txt	Medicaid	1500	Prod	\$110.00	1 Menheer, Mary	04/01/16 9:53 A
NAV032516no1	Medicaid	1500	Prod	\$110.00	1 Menheer, Mary	03/25/16 5:57 P
NAV030716no1	Medicaid	1500	Prod	\$100.00	1 Patel, Aiyav	03/07/16 11:59 A

Files: 23

Buttons: Clear, Find, Close

NextGen - NextGen Medical Practice

File Edit Tasks Reports Admin Window Help

Lookup

- Advisor...
- Appt Book...
- Appt Search...
- BBP
- Charge Posting...
- Create Encounter...
- Create Group Encounter...
- Create Task...
- Create EHR Task...
- Dashboard...
- EHR...

- Accounts...
- Appointments...
- Authorization...
- Charts...
- Claims...
- Eligibility/Referral...
- Employers...
- Encounters...
- Fee Tickets...
- Files...
- People...
- Waitlists...

Enable Create Tasks

- In Enterprise Preferences you can Enable Create Tasks during Claim Edits or Billing Process

The image shows two overlapping software windows. The background window is 'Enterprise Preferences' with the 'General' tab selected. The foreground window is 'Task Types' with the 'Claim Edit Task' selected.

Enterprise Preferences - General Tab

Provider Subgrouping 1	Provider Subgrouping 2	Reason Code Subgrouping 1	Reason Code Subgrouping 2
Test Providers Subgroup			
Location Subgrouping 1	Location Subgrouping 2	Payer Subgrouping 1	Payer Subgrouping 2
Contract Subgrouping 1	Contract Subgrouping 2	Diagnosis Subgrouping 1	Diagnosis Subgrouping 2
test contract subgroup			
Maximum image size in bytes	Self Pay Description	Task Subgrouping 1	Task Subgrouping 2
105500	Self Pay:	test task subgroup	
Loc Master Comment Caption	Enc Lock Interval	In-Line Edits Default Payer ID	National Provider ID
		48	

Task Types - Claim Edit Task

Task Type: Claim Edit Task

Source Type: Encounter | Task Value: 0 | Task Value: test task subgroup | Task Subgrouping 2: <none>

Practice Parameters: Options | Auto Creation | Auto Create Location | Auto Create Rendering | Auto Create Payer Fin... | **Auto Completion** | Auto Worker | Required

Default Completion Reason for all selected actions: Claim Edit Completed

Activate	Action	Override completion reason	Processed
	A claim status inquiry is processed		Immediately
	A claim status inquiry is processed with a status code of <Unknown>		Immediately
	A claim status inquiry is received with a status category code of <Unknown>		Immediately
✓	Clean claim created.		Immediately
	Encounter balance less than \$0.00		Nightly
	Encounter reaches bad debt status		Nightly
	Encounter reaches history status		Nightly
	Form template of <Unknown> printed		Immediately
	Patient payment on Account greater than \$0.00 posted		Immediately
	Patient payment posted		Immediately
	Print statements indicator turned on		Nightly

Buttons: OK, Cancel

Create Task Workgroups

The screenshot displays the 'PM Master Files - Practice' interface. On the left, a navigation pane lists various system and practice management options. The main area shows a list of 'Task Workgroups' with 'Billers' selected. A 'Task Workgroups' dialog box is open, showing the 'Billers' group type and a list of users. The 'Users' dialog box is also open, showing a list of users with 'Anderson MD, Barry' selected.

PM Master Files - Practice

- Appointment Reminders
- Default User Prefs - General
- Default User Prefs - Locations
- Default User Prefs - Scheduling
- Dunning Messages
- Groups
- Letters
- Marketing Plans
- Patient Statuses
- Recall Plans
- Report Types
- Statement Parameter Mappings
- Task Approval Profile
- Task Workgroups

Task Workgroups List

- Master Files
- Task Workgroups
- Task Workgroups List Search
- Billers
- Administration
- BCBS Billing Staff
- Billers
- Collections Team
- Commercial Billing
- Downtown Front D
- EHR Administratic
- Front Desk
- Lab Techs
- Nurses
- Providers
- Scheduling
- Training Class
- Westside Team

Task Workgroups

Workgroup Name: Billers

Description:

Group Type: EHR PM Both

Locations:

Users

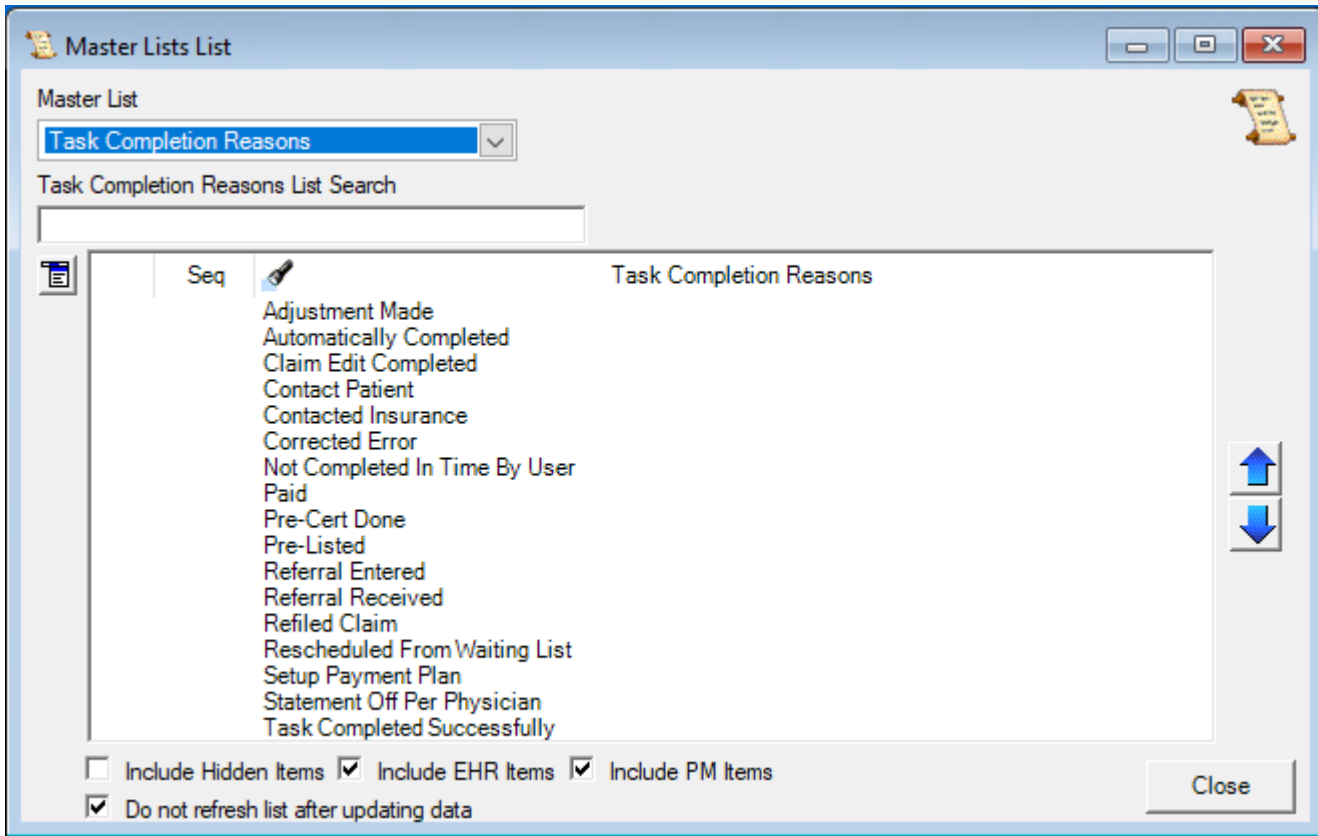
Available	Included
Anderson MD, Barry	Workstation. 82
Anderson MD, Barry	Workstation. 83
Anderson MD, Barry	Workstation. 84
Anderson MD, Barry	Workstation. 85
Anderson MD, Barry	Workstation. 86
Anderson MD, Barry	Workstation. 87
Anderson MD, Barry	Workstation. 88
Anderson MD, Barry	Workstation. 89
Anderson MD, Barry	Workstation. 90
Anderson, Betsy	

Search for keyphrase anywhere in this field

OK Cancel

Create Auto Complete Reason

- File Maintenance > Master Lists > Task Completion Reasons



Create Claim Edit Tasks

- Create Desired Task Types
- Populate Default Assigned to
- Set Auto Complete when Clean Claim Created

PM Master Files - System

Code Tables

Libraries

Master Files

Master Lists

AutoFlow Sequences

Budget Statement Messages

Case Contacts

CMN Information

Collection Agencies

Correspondence Language Mapping

Counters

Forms Enhanced

ICDCM Codes

Label Products

Label Templates

Locality Tax Rate

Locations

Patient Responsibility

Specialties

Statement Messages

Task Types

Taxonomy Codes

Transaction Codes

User Notes Descriptions

Zip Codes

Task Types List

Master Files

Task Types

Task Types List Search

Claim Edit Task

3 Statements Witho
3rd Party W/o
Account Credit Bal
Account Task RH
Add Information
Add Referring MD
Change Of Address
Claim Edit Task
Collection Letter
Encounter Task - RH
Fee Tickets
Follow Up 40+ Days
Medicare Claim Fol
Misc Appt Task
Needs Authorization
Overdue Invoices
PAQ Missing/Unsig

Include Hidden Items
 Do not refresh list after u

Task Types

Task Type
Claim Edit Task

Source Type
Encounter

Task Value
0

Task Subgrouping
<none>

Practice Parameters

Generate System Alert

Default Priority
Default Assigned To
Admin, NextGen;Marrone, Gina;

Supervisor's Task Instructions

Discontinue future auto creation of this task type
Indefinitely
For 1 days after the task has been comp

Workable Task

Initiate Task in EHR

Task Types

Task Type
Claim Edit Task

Source Type
Encounter

Task Value
0

Task Subgrouping 2
<none>

Practice Parameters

Auto Creation
 Auto Create Location
 Auto Create Pending
 Auto Create Payer/Fin...
 Auto Completion
 Auto Worker
 Required

Default Completion Reason for all selected actions
Claim Edit Completed

Activate	Action	Override completion reason	Processed
<input type="checkbox"/>	A claim status inquiry is processed		Immediately
<input type="checkbox"/>	A claim status inquiry is processed with a status code of <Unknown>		Immediately
<input type="checkbox"/>	A claim status inquiry is received with a status category code of <Unknown>		Immediately
<input checked="" type="checkbox"/>	Clean claim created		Immediately
<input type="checkbox"/>	Encounter balance less than \$0.00		Nightly
<input type="checkbox"/>	Encounter reaches bad debt status		Nightly
<input type="checkbox"/>	Encounter reaches history status		Nightly
<input type="checkbox"/>	Form template of <Unknown> printed		Immediately
<input type="checkbox"/>	Patient payment on Account greater than \$0.00 posted		Immediately
<input type="checkbox"/>	Patient payment posted		Immediately
<input type="checkbox"/>	Print statements indicator turned on		Nightly

Who/When

Who/When

OK Cancel

Attach Task Types to Claim Edit Numbers

- Right Click in Task Type Column
- Select Open to Attach Appropriate Task Type

The screenshot shows the 'Claim Edit Library Maintenance' application window. At the top, there are fields for 'Claim Edit Library' (set to 'Default Claim Edits'), 'Quick Start', 'Default Task Type' (set to 'Claim Edit Task'), and 'Default Severity' (set to 'Warning'). Below these is a table with columns: Active, ID, Claim Edit, Help Text, Applicable To, Severity, Claim Field, and Task Type. The table contains 20 rows of claim edit entries. A context menu is open over the 'Task Type' column, showing options: Find... (Ctrl+F), Clear, Open, and Reset Help Text. A 'Task Types' dialog box is also open, showing a dropdown menu with 'Claim Edit Task' selected and 'OK' and 'Cancel' buttons.

Active	ID	Claim Edit	Help Text	Applicable To	Severity	Claim Field	Task Type
	1	Submitter Profile is required	Add the Submitter Profile.	Submitter Master	Warning	NM103	
	2	Provider's Specialty is required	Add the Provider's Specialty.	Billing Provider	Warning	PRV03	
	3	Provider's Phone number must contain an area code	Add the area code to the Provider's phone num	Billing Provider	Warning	PER04	
	4	Payer requires the Insurance Type code, when it is not primary	Add a valid Insurance Type code. Valid codes	Payer Master	Warning	SBR05	
	5	Claim Filing Indicator is required prior to mandated use of Plan	Add a valid Claim Filing Indicator.	Payer Master	Warning	SBR09	
✓	6	Current Payers' Insured's Policy Number is required	Add the Insured's Policy Number for the insuran	Insurance Maintena	Required	NM109	
✓	7	Current Payers' Insured's Birth Date is required	Add the Insured's Birth Date.	Subscriber Demogra	Requ	DMG02	
✓	8	Current Payers' Insured's Sex is required	Add the Insured's Sex.	Subscriber Demogra	Required	DMG03	
	10	Provider's Address is required	Add the Provider's Address.	Billing Provider	Warning	N301	
	11	Provider's City is required	Add the Provider's City.	Billing Provider	Warning	N401	
	12	Provider's Zip Code is required	Add the Provider's Zip Code.	Billing Provider	Warning	N403	
✓	13	Current Payers' Insured's Address is required	Add the Insured's Address.	Subscriber Demogra	Required	N301	
✓	14	Current Payers' Insured's City is required	Add the Insured's City.	Subscriber Demogra	Required	N401	
✓	15	Current Payers' Insured's State is required	Add the Insured's State.	Subscriber			
✓	16	Current Payers' Insured's Zip Code is required	Add the Insured's Zip Code.	Subscriber			
✓	17	Provider's Name is required	Add the Provider's Name.	Billing Prov			
✓	18	Patient's Last Name is required	Add the Patient's Last Name.	Patient De			
✓	19	Patient's First Name is required	Add the Patient's First Name.	Patient De			
✓	20	Patient's Address is required	Add the Patient's Address.	Patient De			

Edits Selected: 68/294

Who/When Default to Payers

Task Types

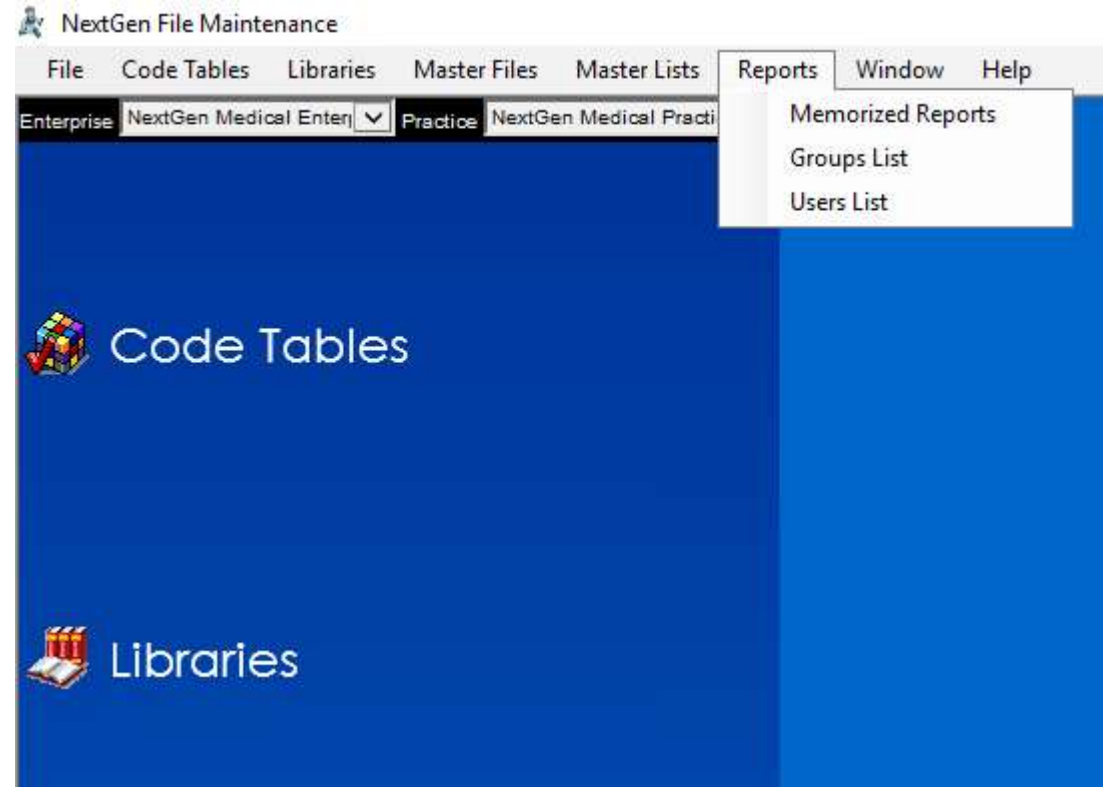
Task Types

Claim Edit Task

OK Cancel

Reporting on Groups and Users

- In File Maintenance we can run a list of Groups with security rights assigned
- Generate a list of Users (active or inactive) and the Security Groups that they belong to



Reporting on Groups

- Ability to report on System, Documents, and Templates
- Based on if the Right is in Module or Operations the appropriate columns will be populated

NextGen Report Filter: Group Listing

Settings List

- Columns
- Filter 1
- Filter 2
- Practices
- Sorting
- Totals

Include records that meet the following conditions

Security Items System Document Template

Enterprise	Practice	Module/Operati	Parent Level Securit	Child Level Security	Access Rights	View	Add	Update	Delete	Print
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance			Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	Additional Lens Charges		Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	Allergy		Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	Allergy Reaction		Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	Anesthesia Library		Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	ASA Crosswalk Library		Y	Y	Y	Y	Y
NextGen Medical Enterprise	NextGen Medical Practice	Module	File Maintenance	AutoFlow Sequences		Y	Y	Y	Y	Y

Options Head/Foot Save OK Cancel

Reporting on Users

- You could include or exclude Inactive users
- Or run the report for specific users by setting parameters in Filter 2
- If the User lives in multiple Security Groups they will be listed multiple times

NextGen Report Filter: User Listing

Settings List

- Columns
- Filter 2
- Practices
- Sorting
- Totals

Specify additional criteria as needed

User Name	<input type="text"/>	<input type="text"/>
Login Id	<input type="text"/>	<input type="text"/>
User ID	<input type="text"/>	<input type="text"/>
Enterprise	<input type="text"/>	<input type="text"/>
Practice	<input type="text"/>	<input type="text"/>
Group	<input type="text"/>	<input type="text"/>
Hid	<input type="text"/>	<input type="text"/>
Inactive User	<input type="text"/>	<input type="text"/>
Optic Mgt User	<input type="text"/>	<input type="text"/>

Find
Find Next

User Name	Login Id	User ID	Enterprise	Practice	Group	Hid	Inactive User	Optic Mgt User
Schaeffer, Linda	lschaeffer	5	NextGen Medical Enterprise	NextGen Medical Practice	Billing			
Schaeffer, Linda	lschaeffer	5	NextGen Medical Enterprise	NextGen Medical Practice	Front Desk			

Options Head/Foot Save OK Cancel

Q&A

Thank You For Joining!