

Workflow for: Internal Medicine I Pediatrics I Family Medicine I Specialty

☑ Clerical □ Clinical □ Pro

ical 🗆 Provider

Draft: 1/14/10

Pages: 9

Approved by: On File

Next Gen: Enterprise Balance Collection @ Check-In

A "System Alert" will display informing you the patient has an "Enterprise Balance" (any self pay monies owed to TCMA) when creating the Encounter. Please make note of this information because you will need to ask the patient for this amount in addition to their co-payment, if applicable, later in the Check-In process.

NextGen Alerts		×
Alerts		Close
System Alerts		
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If the patient's insurance requires a co-payment, an alert will display after the "Encounter Insurance Selection" screen.

NextGen Encounter Insurance Selection Alerts	
Alerts Encounter Insurance	Close
United Health requires a co-payment of \$25.00	

Please make note of the patient's copayment amount. You will need to add this to the "Enterprise Balance" to calculate the total amount due today.

When the "Patient Balance" screen displays please inform the patient there is an "Enterprise Balance" due on their account.

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Bad Debt Amount:	\$0.00							
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the guarantor. The totals listed above	voice							
information are the account informati	on of the guarantor.	_						

ex) I show you have an "Enterprise Balance" of \$113.35 due on your account

**Please ask the patient for the total amount due including their copayment.....

ex) Including your copayment of \$25.00 the total due today is \$138.35 please.

If the patient asks the simple question, "What is this balance for?"

The next screen that comes up is the Payment Entry Screen. You can easily determine "What the Enterprise Balance consists of" by:

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Click on the "Chart" short cut to access the patient's financial information.

With this link to the "Chart" the Alert will come up again, informing you of the patient's "Enterprise Balance"

NextGen Alerts	×
Alerts	Close
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Privacy Notice	
The patient has not been issued a privacy notice.	
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Click "Close" to continue.

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Next, click on the "Financial" tab to review the dates corresponding to the "Self" balance.

Notice, the **total** in the "Self" column matches the total amount listed in the "Enterprise Balance" Alert. ex) \$113.35

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The dates of service are listed in the "Date" column on the "Financial" screen.

If the patient requires more information please refer to them to the billing office

Click the upper left corner of the screen and

select "Close" to return to the "Payment Entry Screen".

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On the "Payment Entry" screen enter the **total \$** (Enterprise Balance and Co-Pay) the patient is paying in the "Pay Amt" field.

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Select "Encounter" at the prompt request to indicate where the unapplied amount should be applied.

If the patient requests a receipt, it will show the total amount paid today.

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**The Billing Department will apply the Enterprise Balance paid, in addition to the Co-Payment, to the patient's account appropriately.