

Workflow for: ☒ Internal Medicine ☒ Pediatrics ☒ Family Medicine ☒ Specialty
☒ Clerical ☐ Clinical ☐ Provider

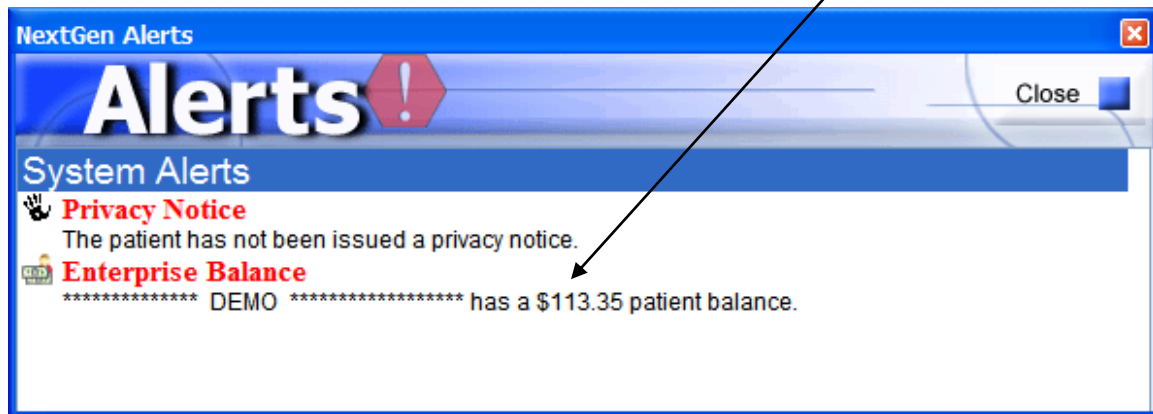
Draft: 1/14/10

Pages: 9

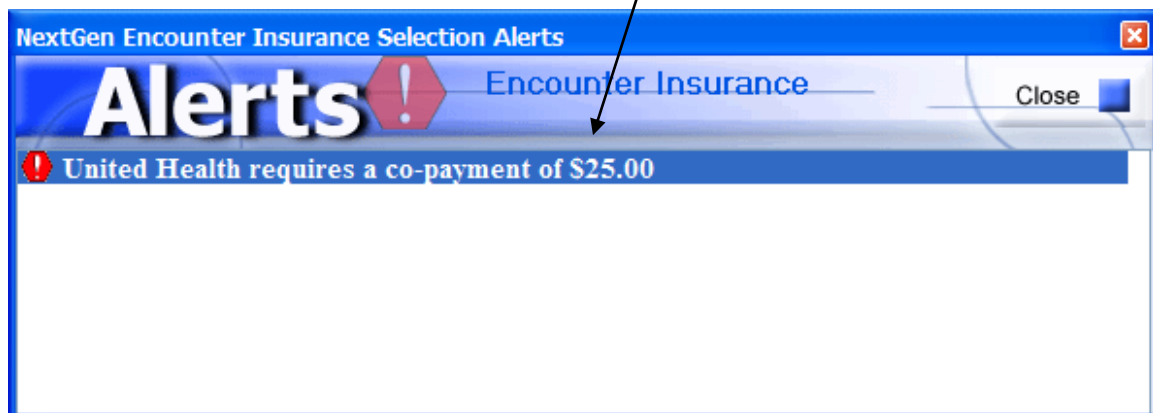
Approved by: On File

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.



If the patient’s insurance requires a co-payment, an alert will display after the “Encounter Insurance Selection” screen.



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.

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

Patient Balance

Guarantor Name: **Test, Thomas A - 59556**

Total Charges to Date:	\$757.00
Total Payments, Adj and Refunds to Date:	-\$643.65
Total Amount Due:	\$113.35
Amount Due Patient/Guar:	\$113.35
Bad Debt Amount:	\$0.00
Amount Due Insurance:	\$0.00
Available Credit:	\$0.00

Encounter/Invoice Information

△ Enc/Inv...	Enc/In...	ST	Pat Resp Dt	Sts	Patient Name	Primary Payer	Sec...	Terti...	Ins Bal	F
01/16/2007	335206 V		03/01/2007	H	Test, Thomas A	United Health			\$0.00	
01/18/2007	337099 V		02/23/2007	H	Test, Thomas A	United Health			\$0.00	
01/29/2007	343690 V		02/23/2007	H	Test, Thomas A	United Health			\$0.00	
02/13/2007	354987 V		02/23/2007	H	Test, Thomas A	United Health	Blue ...		\$0.00	
04/04/2007	389278 V		04/19/2007	H	Test, Thomas A	Blue Cross ...			\$0.00	
06/21/2007	439877 V		08/07/2007	B	Test, Thomas A	United Health			\$0.00	
06/25/2007	441477 V		08/07/2007	B	Test, Thomas A	United Health			\$0.00	
06/29/2007	444729 V		08/07/2007	B	Test, Thomas A	United Health			\$0.00	
11/26/2008	505975 V				Test, Thomas A	United Health			\$0.00	

Encounter Count: 75

This screen uses the current encounter to determine the guarantor. The totals listed above and the encounter/invoice information are the account information of the guarantor.

AutoFlow [icon] Close

****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:

Click on the “Chart” short cut to access the patient’s financial information.

NextGen - DEMO

File Edit Tasks Reports Admin Window Help

Lookup Appointment Appointment Book Chart Account Encounter Posting Claims Bill Statements Letters Charges Edits Mail Box Worklog EDI File Reports ICS Practice

Payment Entry

Control Group: 0001 01/13/2010 FMA 1/13/10

Source/Acct: Encounter Test, Thomas Created: 4 of 4
Patient/MRN: Test, Thomas 168159 Modified

Encounter: 586371 01/14/2010 Unbilled Clm/Resub #:
Payer: Patient Reasons:
Tracking: Acct Credit:
Date: 01/13/2010 Enc Credit:
Pay Amt: Pay Code:
Adj Amt: Adj Code:
☐ Use Account Credit
☐ Use Encounter Credit

Next Open Save Cancel Delete Clear Recalc Xfer Credit COB AutoFlow

Date	SIM	Desc...	CPT4	Rendering	Qty/Charge	Allowed	%	Pay	Adj	Balance	Status	Reasons	Deduct	Ins 1	Ins 2	Ins 3	Pat Amt	C...

☒ Show All Line Items Unapplied Amount: Totals: 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

Ready NGDemo JNEWTON (480) Version 5.5.26.9 01/14/10 01:41 PM

With this link to the “Chart” the Alert will come up again, informing you of the patient’s “Enterprise Balance”

NextGen Alerts

Alerts!

Close

System Alerts

Privacy Notice
The patient has not been issued a privacy notice.

Enterprise Balance
***** DEMO ***** has a \$113.35 patient balance.

Click “Close” to continue.

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

The screenshot shows the NextGen medical software interface. The title bar reads "NextGen - DEMO". The menu bar includes File, Edit, Tasks, Reports, Admin, Window, and Help. The toolbar contains icons for Lookup, ApptList, ApptBook, Chart, Account, Encounter, Posting, Claims, Bill, Strmts, Letters, Charges, Edits, MailBox, Worklog, EOI File, Reports, ICS, and Practice. The main window is titled "Patient Chart - Test, Thomas A" and "Medical Record 168159". The "Financial" tab is selected, and an arrow points to it from the text above. The interface is divided into several sections: Encounters (a list of encounter numbers), Encounter Information (fields for Encounter Nbr, Date, Status, Bill Date, Patient Type, Occurrence Code, Onset Date, Admit Date, Discharge Date, Facility, Print Stmt Ind, Last Stmt Date, Pat Resp Date, NP/PA INCIDE..., and Pre-Listed), Providers (Rendering, Referring, Admitting, Supervisor, and Location), ICD-9-CM (Diagnoses and Procedures), and Guarantor (Test, Thomas A, 12 Pine Street, Hopkinton, MA 01748, USA, Relation: Self, Employer, Day Phone: (508) 348-6262, Home Phone: (508) 348-6262). The status bar at the bottom shows "Ready", "NGDemo", "JNEWTON (480)", "Version 5.5.26.9", and "01/14/10 01:41 PM".

Enc Number
586371
586344
586343
586342
586321
586320
586319
586318
586302
586279
586278
586276
586185
586182
586181
586179
586150
586143
586133
586123
586122
586121
586120
586119
586084
586083
586066

Encounter Information

Encounter Nbr: 586371
Encounter Date: 01/14/2010
Encounter Status: Unbilled
Final Bill Date:
Last Bill Date:
Patient Type:
Occurrence Code: Illness
Onset Date:
Admit Date:
Discharge Date:
Facility:
Print Stmt Ind: Yes
Last Stmt Date:
Pat Resp Date:
NP/PA INCIDE...:
Pre-Listed: No

Providers

Rendering: Sullivan NP, Maria M
Referring:
Admitting:
Supervisor:
Location: Family Medicine Associates

ICD-9-CM

Diagnoses
Procedures

Code Description

Guarantor

Test, Thomas A
12 Pine Street
Hopkinton, MA 01748
USA
Relation: Self
Employer:
Day Phone: (508) 348-6262
Home Phone: (508) 348-6262

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

NextGen - ***** DEMO *****

File Edit Tasks Reports Admin Window Help

LookUp ApptList ApptBook Chart Account Encounter Posting Claims Mail Strmts Letters Charges Edits MailBox Worklog EOI File Reports ICS Practice

Patient Chart - Test, Thomas A

Test, Thomas A Medical Record 168159

Patient Information Financial Clinical History/Notes Encounters

Financial Information

Date	Encounter ...	Charges	Payments	Adj/Refun...	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Case	Patient Ty...	Ln Item Bal
01/13/2009	585934											\$0.00
01/13/2009	585933											\$0.00
01/12/2009	585932		-\$138.35									-\$138.35
01/12/2009	585929											\$0.00
12/30/2008	585923											\$0.00
12/30/2008	585918		-\$138.35									-\$138.35
12/30/2008	585917		-\$138.35									-\$138.35
12/30/2008	585916		-\$25.00									-\$25.00
12/30/2008	585915		-\$25.00									-\$25.00
12/30/2008	585914											\$0.00
12/30/2008	585913											\$0.00
12/30/2008	585912											\$0.00
12/30/2008	585911											\$0.00
12/16/2008	585907											\$0.00
12/16/2008	585908		-\$25.00									-\$25.00
12/16/2008	585909											\$0.00
12/16/2008	585910		-\$125.00									-\$125.00
11/26/2008	585875											\$0.00
06/29/2007	444729	\$10.00	-\$5.25	-\$4.75				\$5.25				\$0.00
06/25/2007	441477	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
06/21/2007	439877	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
04/04/2007	389278	\$60.00	-\$52.06	-\$7.94								\$0.00
02/13/2007	354987	\$152.00	-\$10.00	-\$142.00								\$0.00
01/29/2007	343690	\$155.00	-\$99.64	-\$55.36								\$0.00
01/18/2007	227090	\$50.00	-\$40.67	-\$9.33								\$0.00

Filter

Summary Information

Charges	Unapplied	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Chart Bal
\$757.00	\$0.00	-\$5,692.58	-\$321.57	\$0.00	\$0.00	\$0.00	\$113.35	\$0.00	\$113.35

Encounters: 76

Ready NGDemo JNEWTON (480) Version 5.5.26.9 01/14/10 01:42 PM

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

Ex) 6/29/07 Balance \$5.25

6/25/07 Balance \$54.05

6/21/07 Balance \$54.05

Financial Information

Date	Encounter ...	Charges	Payments	Adj/Refun...	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Case	Patient Ty...	Ln Item Bal
01/13/2009	585934											\$0.00
01/13/2009	585933											\$0.00
01/12/2009	585932											\$0.00
01/12/2009	585929											\$0.00
12/30/2008	585923											\$0.00
12/30/2008	585918											\$0.00
12/30/2008	585917											\$0.00
12/30/2008	585916											\$0.00
12/30/2008	585915											\$0.00
12/30/2008	585914											\$0.00
12/30/2008	585913											\$0.00
12/30/2008	585912											\$0.00
12/30/2008	585911											\$0.00
12/16/2008	585907											\$0.00
12/16/2008	585908											\$0.00
12/16/2008	585909											\$0.00
12/16/2008	585910											\$0.00
11/26/2008	585875											\$0.00
06/29/2007	444729	\$10.00	-\$5.25	-\$4.75				\$5.25				\$0.00
06/25/2007	441477	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
06/21/2007	439877	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
04/04/2007	389278	\$60.00	-\$52.06	-\$7.94								\$0.00
02/13/2007	354987	\$152.00	-\$10.00	-\$142.00								\$0.00
01/29/2007	343690	\$155.00	-\$99.64	-\$55.36								\$0.00
01/19/2007	227090	\$50.00	-\$40.67	-\$9.33								\$0.00

Summary Information

Charges	Unapplied	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Chart Bal
\$757.00	\$0.00	-\$5,692.58	-\$321.57	\$0.00	\$0.00	\$0.00	\$113.35	\$0.00	\$113.35

Encounters: 76

Ready NGDemo JNEWTON (480) Version 5.5.26.9 01/14/10 01:42 PM

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”.

The screenshot displays the NextGen software interface. The main window is titled "Patient Chart - Test, Thomas A" and shows the "Financial" tab. A context menu is open in the upper left corner, with the "Close" option highlighted. The status bar at the bottom shows "Ready", "NGDemo", "JNEWTON (480)", "Version 5.5.26.9", and the date/time "01/14/10 01:43 PM".

Encounter ...	Charges	Payments	Adj/Refun...	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Case	Patient Ty...	Ln Item Bal
01/12/2009 585934											\$0.00
12/30/2008 585933											\$0.00
12/30/2008 585932											-\$138.35
12/30/2008 585929											\$0.00
12/30/2008 585923											\$0.00
12/30/2008 585918											-\$138.35
12/30/2008 585917											-\$138.35
12/30/2008 585916											-\$25.00
12/30/2008 585915											-\$25.00
12/30/2008 585914											\$0.00
12/30/2008 585913											\$0.00
12/30/2008 585912											\$0.00
12/30/2008 585911											\$0.00
12/16/2008 585907											\$0.00
12/16/2008 585908											-\$25.00
12/16/2008 585909											\$0.00
12/16/2008 585910											-\$125.00
11/26/2008 585875											\$0.00
06/29/2007 444729	\$10.00	-\$5.25	-\$4.75				\$5.25				\$0.00
06/25/2007 441477	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
06/21/2007 439877	\$90.00	-\$64.05	-\$25.95				\$54.05				\$0.00
04/04/2007 389278	\$60.00	-\$52.06	-\$7.94								\$0.00
02/13/2007 354987	\$152.00	-\$10.00	-\$142.00								\$0.00
01/29/2007 343690	\$155.00	-\$99.64	-\$55.36								\$0.00
01/19/2007 222000	\$60.00	-\$40.67	-\$19.33								\$0.00

Summary Information

Charges	Unapplied	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Chart Bal
\$757.00	\$0.00	-\$5,692.58	-\$321.57	\$0.00	\$0.00	\$0.00	\$113.35	\$0.00	\$113.35

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

Enter the ck# or CC auth/trans #
in the “Tracking” field.

****Also enter the \$ amount paid today on account.
(please type the words “On Acct” next to the \$ amount)**

Click “Save”.

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

[illegible]

9