

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

Image: ClericalImage: ClinicalImage: ProviderDate Initiated: 5/09Pages: 2Approved by: On File

## **NextGen: Financial Policy Documentation**

From the Appointment Book, right click on the patients name on the schedule

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Highlight and click on the "View Chart" option

The "Patient Chart" screen will pop-up.....click the "Patient Information" tab



Click the : "Chart Details" tab

## Click the "Yellow Folder" icon

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In the "Financial Policy Update" field, type in the date the patient signed the policy \*\*Note...leave all existing dates in place

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Click "OK"

The date is now recorded

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