

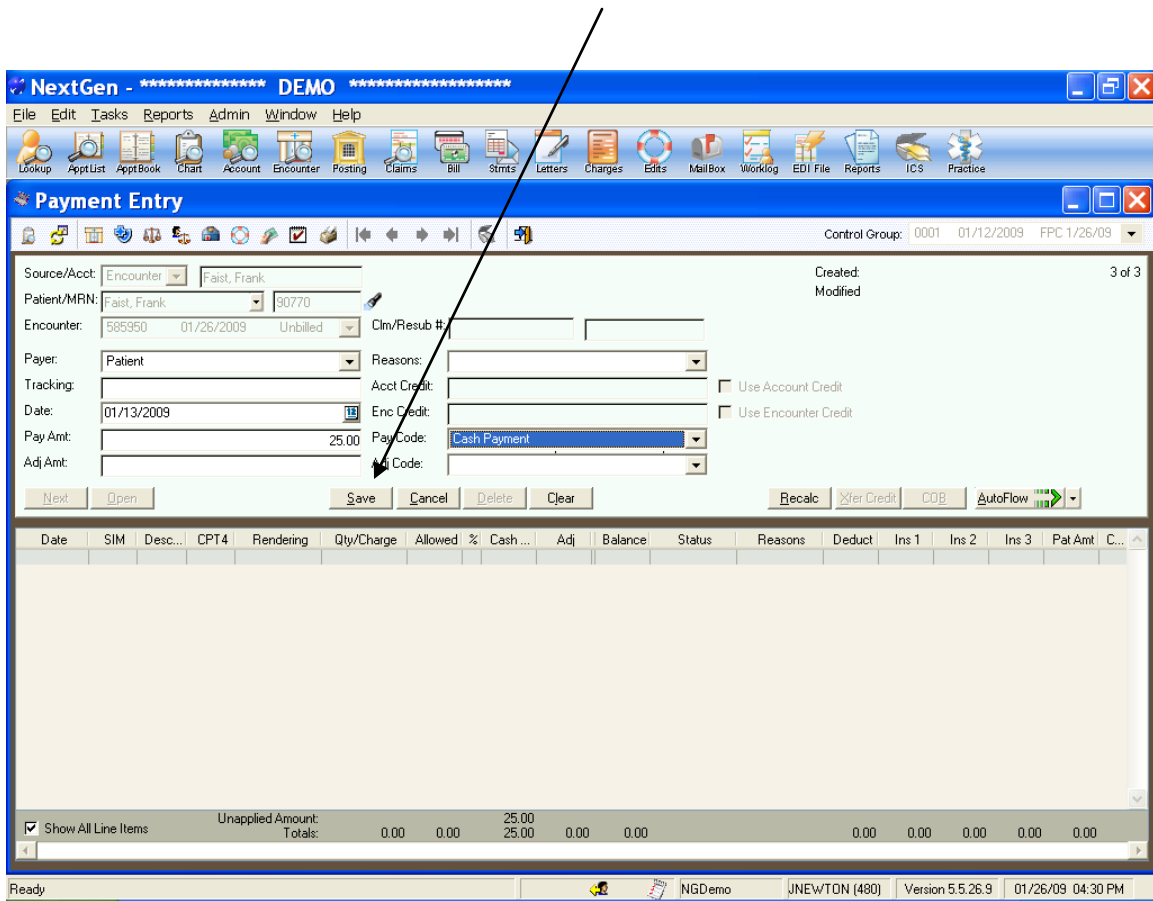
Workflow for: Family Medicine Internal Medicine Pediatrics Specialty
 Clerical Clinical Provider

Date Updated: 01/09 Pages: 10 Approved by: On File

Next Gen: Printing Receipts for Payments

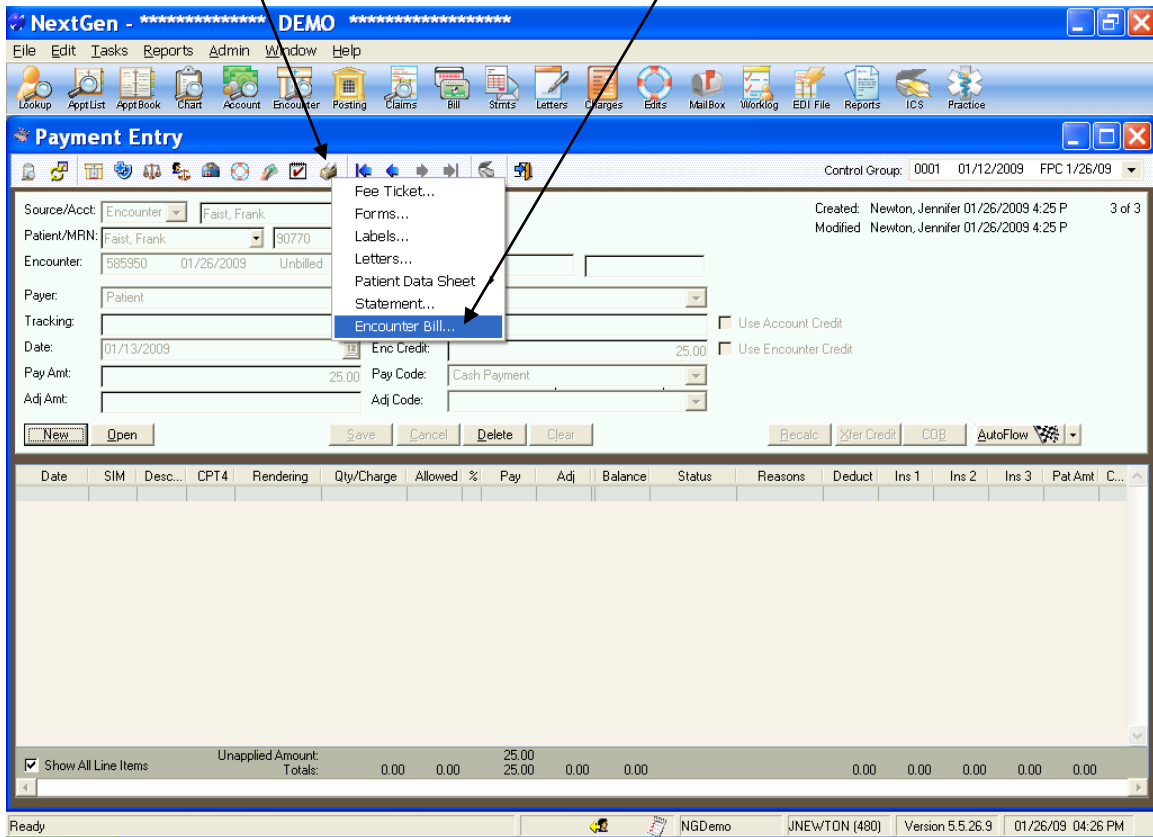
Printing a receipt from the Payment Entry Screen

After entering payment details and clicking “Save” on the “Payment Entry” screen.

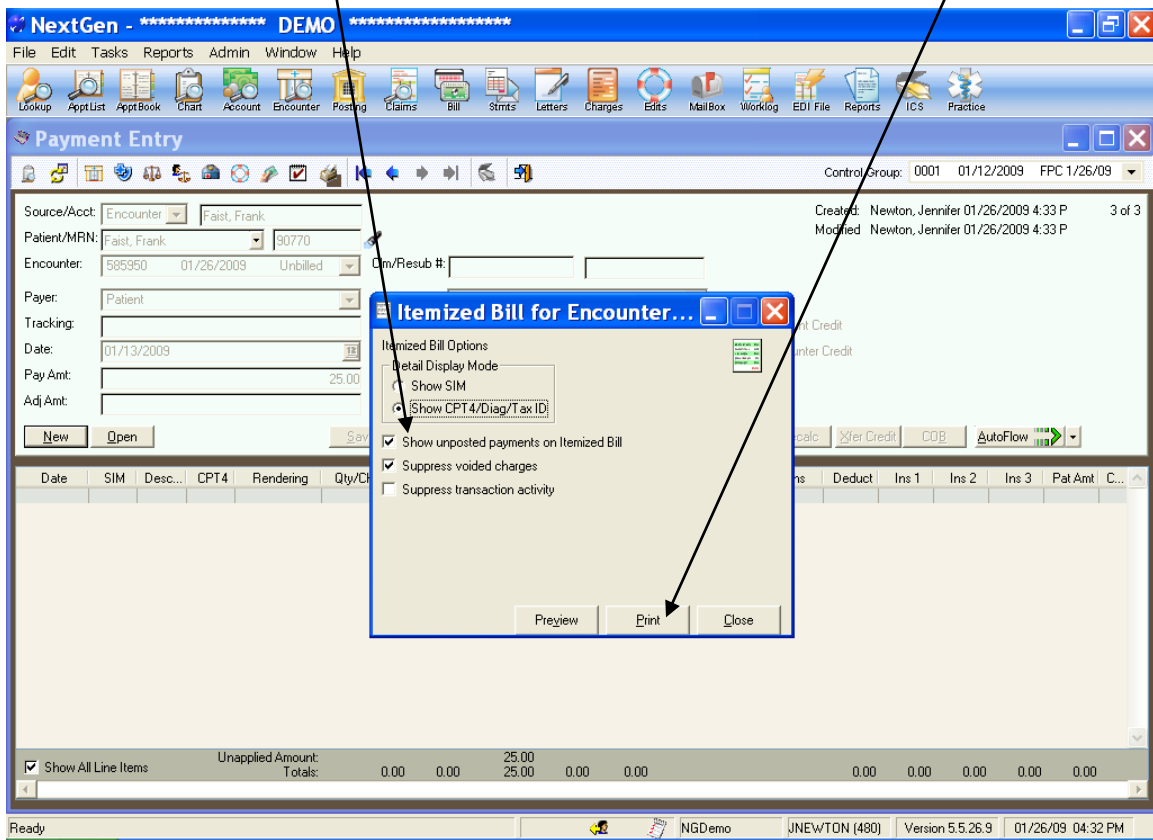


Click on the printer icon to produce drop-down box.

Select "Encounter Bill" from the list.



Verify “Show unposted payments on Itemized Bill” is checked and select Print.



Printing a receipt from the Batch Posting

Click on "Posting", then right click on your batch and select "Ledger"

The screenshot displays the NextGen software interface. The main window shows a patient chart for "Faist, Frank" with a scheduler book for Monday, January 26, 2009. A "Batch Posting" dialog box is open, listing existing batches. A right-click context menu is visible over the selected batch, with "Ledger..." highlighted. Arrows from the text above point to the "Posting" button in the software's toolbar and the "Ledger..." option in the context menu.

Existing Batches:	BBP	Date	ID	Description	Members	Status	Secured
<input type="checkbox"/>		01/20/2009	0001	FPP 1/20/09	0	Out of balance	
<input type="checkbox"/>		01/13/2009	0001	Test New Paycode...DMJ	5	Out of balance	
<input checked="" type="checkbox"/>		01/12/2009	0001	FPC 1/26/09			
<input type="checkbox"/>		01/05/2009	0001	1/5/08 FPC			
<input type="checkbox"/>		12/30/2008	0001	12/30/08 FPC			
<input type="checkbox"/>		12/09/2008	0001	FPC 12/9/08			
<input type="checkbox"/>		12/09/2008	0001	FPC 12/9/08			

Double Click on the payment transaction from the Ledger.

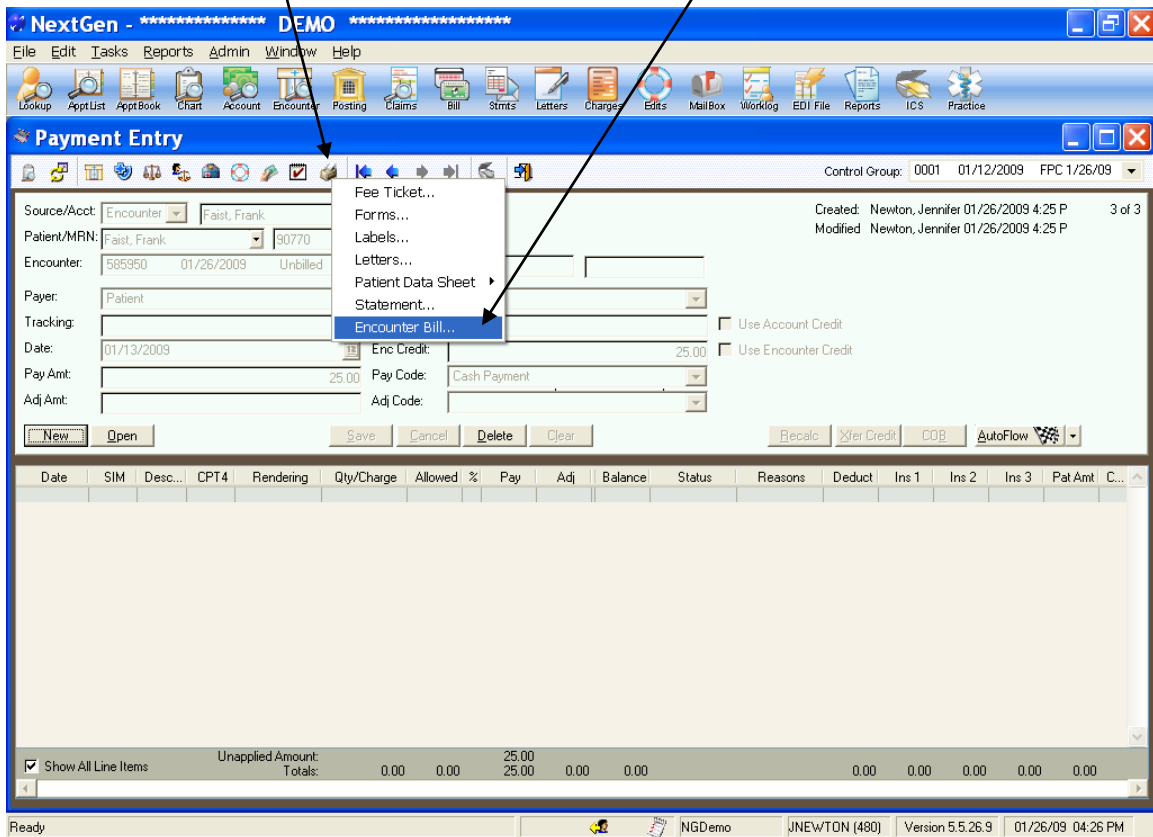
The screenshot displays the NextGen software interface. The main window is titled "Patient Chart - Faist, Frank" and shows a "Scheduler Book: Monday, January 26, 2009". A "Transaction Ledger" window is open in the foreground, showing a table of transactions. A double-click arrow points to the second row of the ledger, which is highlighted in blue. The ledger table has columns for Source, Filter, Tran D..., Billed, Allowed, Payment, Adjustment, Tran Code, Tracking Desc, and Name. Below the table, there is a "Summary Information" section with a table showing Billed, Allowed, Payment, and Adjustment values. The status bar at the bottom indicates "Ready", "NGDemo", "JNEWTON (480)", "Version 5.5.26.9", and "01/27/09 11:19 AM".

Source	Filter	Tran D...	Billed	Allowed	Payment	Adjustment	Tran Code	Tracking Desc	Name
0001	585932	Encou... 01/12/09	0	0	\$138.35	0	Check Payment	CK#123 \$113...	Abbate, T...
0002	585936	Accou... 01/12/09	\$190.00	0	\$113.35	0	Cash Payment		Abbate, T...
0003	585950	Encou... 01/13/09	0	0	\$23.00	0	Cash Payment		Faist, Frank

Summary Information					
Header	Billed	Allowed	Payment	Adjustment	Close
	\$190.00	\$0.00	\$276.70	\$0.00	

Click on the printer icon to produce drop-down box.

Select "Encounter Bill" from the list.



Verify “Show unposted payments on Itemized Bill” is checked and select Print.

The screenshot shows the NextGen software interface. The main window is titled "Payment Entry" and contains a form with the following fields:

- Source/Acct: Encounter Faist, Frank
- Patient/MRN: Faist, Frank 90770
- Encounter: 585950 01/26/2009 Unbilled
- Payer: Patient
- Tracking:
- Date: 01/13/2009
- Pay Amt: 25.00
- Adj Amt:

The "Itemized Bill for Encounter..." dialog box is open, showing the following options:

- Detail Display Mode:
 - Show SIM
 - Show CPT4/Diag/TaxID
- Show unposted payments on Itemized Bill
- Suppress voided charges
- Suppress transaction activity

The "Print" button is highlighted in the dialog box. The status bar at the bottom shows "Ready" and "NGDemo JNEWTON (480) Version 5.5.26.9 01/26/09 04:32 PM".

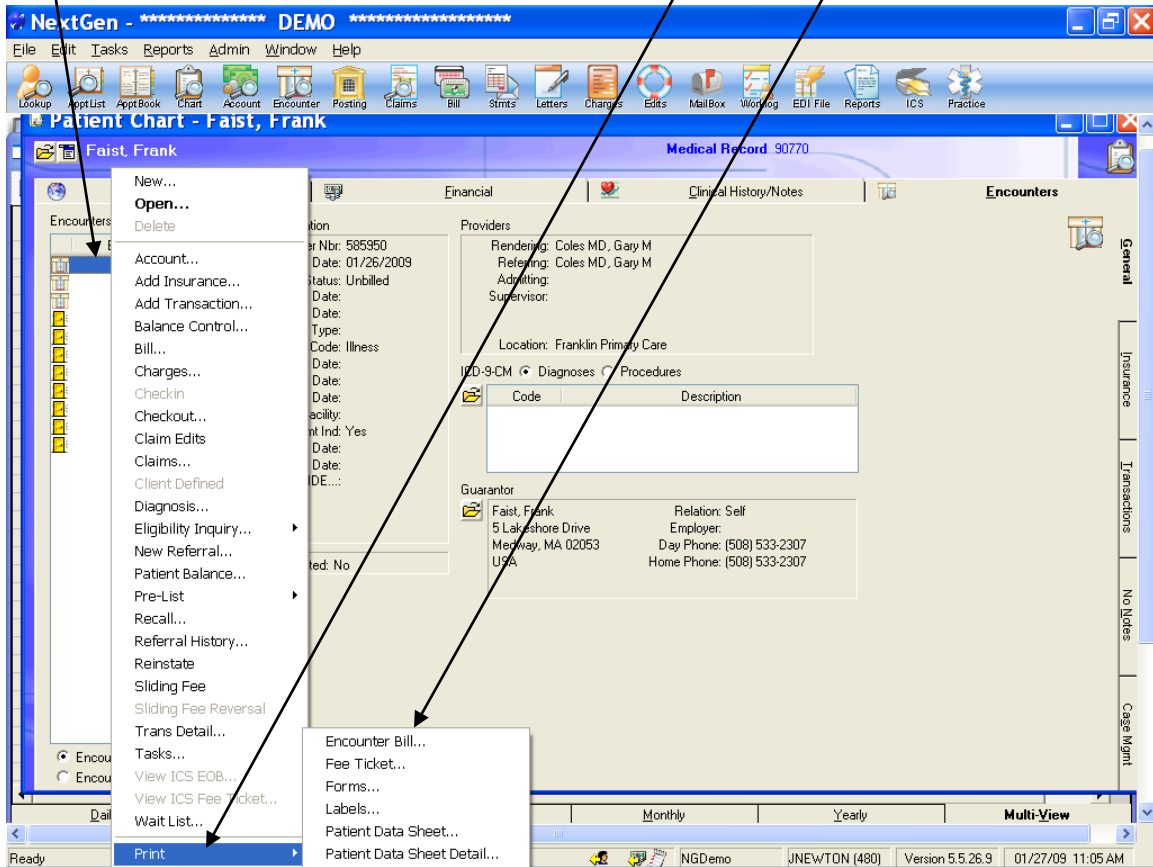
Printing a receipt from the Patient's Chart

From the schedule, right click on the patient's appointment and select "View Chart"

The screenshot displays the NextGen Scheduler Book for Monday, January 26, 2009. The interface includes a menu bar (File, Edit, Tasks, Reports, Admin, Window, Help), a toolbar with various icons, and a main scheduling grid. The grid shows time slots from 7:30 A to 2:45 P and columns for different providers: Dr. Carreiro, Coles, Dr. Cook, FPC Flu Clinic, FPC Nurse Visit, Dr. Eric Kohler, Russell PA, and Woodward. A context menu is open over an appointment at 8:30 A in the Coles MD column. The menu options include: New..., Open..., Delete..., Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Appointment Information..., Attach to Mail..., Make Recurring..., View Rescheduled History..., Wait List..., Add Transaction..., Checkin/Create Encounter, Checkout..., Charges..., Claim Edits..., Eligibility Inquiry..., New Referral..., Patient Balance..., Recall..., Referral History..., View Chart (highlighted), Encounter..., and Print. Two arrows point from the text above to the 'View Chart' option and the appointment itself.

Time	Dr. Carreiro	Coles, Gary	Dr. Cook 2009	FPC Flu Clinic	FPC Nurse Visit	Dr. Eric Kohler	Russell PA, Nancy P.	Woodward
7:30 A								
7:45 A								
8:00 A								
8:15 A								
8:30 A		Fast, E						
8:45 A								
9:00 A								Dunlap, Raymond - P
9:15 A	Guzzetti, Ralph J - PE	Test, Te						
9:30 A								
9:45 A								
10:00 A								
10:15 A								
10:30 A								
10:45 A								
11:00 A								
11:15 A								
11:30 A								
11:45 A								
12:00 P								
12:15 P								
12:30 P								
12:45 P								
1:00 P								
1:15 P	Keophannga, Christine							
1:30 P								
1:45 P								
2:00 P								
2:15 P								
2:30 P								
2:45 P								

The patient's chart will open to the Encounters tab. Right click on the encounter for today's visit (will be at the top of the list) and click "Print", then "Encounter Bill".



Verify “Show unposted payments on Itemized Bill” is checked and select Print.

