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Topic
NextGen Practice Management New Release Functionality Overview

Level
200
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5.8 UD3 Highlights
5.8 UD3 Feature Highlights

File Maintenance
Unapplied Credits
Patient Portal Integration
Patient Collections
Patient Insurance Selection
Patient Demographics
Enhanced Forms
Appointment Scheduling
Tasking/Worklog
Recall Plans
Billing & Collections
BBP Enhancements
File Maintenance

Advanced Audits for changes to Enterprise and Practice Preferences
File Maintenance – Payer Name Update

Ability to mass update expiration date and payer name
File Maintenance – Payer Expiration
Search Tool for Preferences and File Maintenance

Right Click search controls:

- Practice Preference
- Enterprise Preference
- File Maintenance Libraries
- Master Files
- Master Lists
Unapplied Credits

- Separate security for Encounter vs. Account unapplied credits
- Automated way to apply multiple encounter unapplied credits from File > Processes window
Patient Portal Updates in PM

- Additional “Patient Portal Statuses” reflected with additional icons
- Patient Portal Enrollment added to AutoFlow
## Patient Portal Enrollment Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Enrolled</td>
<td>The patient has not been enrolled in the system</td>
</tr>
<tr>
<td>Pending</td>
<td>The patient has a pending enrollment and has no guardians</td>
</tr>
<tr>
<td>Completed</td>
<td>The enrollment request was mapped to existing enrollment</td>
</tr>
<tr>
<td>Completed</td>
<td>The enrollment request has been accepted and new Portal Patient was created</td>
</tr>
<tr>
<td>Account Locked</td>
<td>The Account has been locked out and an email notification has been sent</td>
</tr>
<tr>
<td>Declined by Practice</td>
<td>This enrollment request was rejected by the practice</td>
</tr>
<tr>
<td>Declined by Patient</td>
<td>The enrollment is currently declined.</td>
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<tr>
<td>Pending with Guardian</td>
<td>Person pending enrollment, At least one pending Guardian</td>
</tr>
<tr>
<td>Completed with Guardian</td>
<td>Person pending enrollment, At least one completed Guardian</td>
</tr>
<tr>
<td>Pending</td>
<td>Person has temporary login completed (via bulk enrollment) but has not logged in yet to activate the account.</td>
</tr>
<tr>
<td>Completed</td>
<td>Person had temporary login completed (via bulk enrollment) but has logged in to activate the account.</td>
</tr>
</tbody>
</table>
Patient Portal Integration

• Allow multiple payments prior to receiving another statement

• Display real-time balances
Patient Collections – Credit Cards

- Updated credit card API platform
- Print a credit card receipt and collection signature via eSignature pad
- Support for EMV process
- Retain credit card information on file using token ID (Phase I of proposed automation)
Patient Collections - Statements

• Add the statement counter to the statement export file
• Allow the dunning messages to trigger from the statement counter
• Changes to header and footer for multiple page statements
Patient Collections – Account Screen

Added Last Self Pay, Last Self Pay Amount, Last Bad Debt Paid Amount, and Last Bad Debt Paid Amount to:

- Account Look Up
- Task Auto-create options
- Multiple Reports including
- Pre-List and Aging reports
Patient Collections – Account Screen

- Update the Encounter Detail at the Account Level

| Account Profile: McNamara, Curran

<table>
<thead>
<tr>
<th>Properties</th>
<th>Encounters Detail</th>
<th>Acct Summary</th>
<th>Credit Card on File</th>
<th>Budget</th>
<th>Notes</th>
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<tbody>
<tr>
<td><strong>Summary Information</strong></td>
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<tr>
<td>Total Balance</td>
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<td>Charges</td>
<td>$7,992.74</td>
<td>Payments</td>
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<p>| Guarantee Information | | | | |</p>
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<th>CPT</th>
<th>Qty</th>
<th>DX</th>
<th>Rendering</th>
<th>Location</th>
<th>Charges</th>
<th>Payments</th>
<th>Adj/Refunds</th>
<th>Ins Balance</th>
<th>Pt Balance</th>
<th>Balance</th>
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<th>Ins 3</th>
<th>Bad Debt</th>
<th>First Bill Date</th>
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</table>
Reporting

New Reporting Features:

- Add an information tab to top 10 reports with logic and other pertinent information
- Security for deleting reports
- Additional columns on Accounts Receivable Analysis to include total payments/adjustments/refunds and collection percentages
- Add deceased indicator on bad debt process report
Reporting

- Ability to create a “My List” for Population Health Hub
Patient Insurance Selection

• Added visibility of the “Notes” in the Add Insurance window
Patient Insurance Selection

- Added push pins indicating data present in the patient chart/insurance window and the add appointment window
Patient Demographics

- Extend phone number look up to all types of phone numbers
- Customizable Patient Info bar which will display in the patient chart; charge entry; and transaction entry windows
Patient Demographics

- OCR Driver’s license and insurance cards
There are circumstances where patients with the same birth dates and genders are not necessarily duplicate patients (twins, triplets, etc.).

The patient merge exemption checkbox will be added to the patient maintenance screen to exclude such patients from the patient merge process done by the BBP.
Form Templates

- Ability to archive an actual copy of the Form/Letter
Enhanced Forms

- Whole new form generation engine
- Ability to set up and print groups of forms
Editing – Enhanced Forms

• New engine can be used to create custom fee tickets or patient data sheets
Appointment Scheduling

- Display Health Maintenance/Clinical data

Practice Preference to set number of days to display for Care Guidelines
Tasking/Worklog

• New Auto-create option to write off small balances at the Account level
• New Auto-create option to write off small patient/insurance **credit** balances at the Encounter level
• Enterprise Worklog to allow users to see and work tasks in multiple Practices at once
User Preferred Tasks “Favorites”

“Preferred Tasks” - Set up in User Preferences
Save Search Criteria for Selection

- Ability to save searches for each User
Enterprise Worklog

- Additional Look up filters on General tab and improved usability of Advanced Tab, as well as more options on the General tab
Recall Plans

New Recall Features in UD3:

- Multiple updates to Recall functionality, including a push pin notification on the appointment window
- Ability to edit existing Recall plans
- Added a field for the “last date performed”
Recall Stop Reason

- Recall stop reasons (Practice Preference)
Recall Alerts include Plan Name and Due Date

Preference to limit alert and display additional information within the alert
Expired Patient Future Appointments Active Recall Message

1. Expired box is checked.
2. Expired date box appears.
3. Display message after "Expired Date is entered"
New Recall Sig Events and Advanced Audit

Recall Plan Added
Recall Plan Stopped
Recall Plan Plan Updated
Put Multiple Patients on a Recall Plan

- Reports > General > Patient Recall
- Reports > General > Patient Chart Demographics
- Reports > General > Patient Chart Demographics by Provider
- Reports > Daily > Charges
Stop Recall for Multiple Patients from Recall Report
Billing and Collections

New Features in UD3:
- Fully integrated support for APG billing methodology and corresponding A/R reporting
- Ability to combine charges for multiple encounters done on the same day into one claim and support corresponding ERA (aka “Superclaim”)
- Additional ERA matching logic
- Tasking from Anesthesia audit and contract report
- Additional support for behavioral health billing roll up logic
- Support for OB Anesthesia concurrency
Encounter Lookup Changes
SSO with NextGen® and ViaTrack®

- New icons to access www.NextGen.com and ViaTrack® and work from those sites within NextGen® PM system
- Eliminates additional sign on and enforces security via Security Groups in PM
SSO with NextGen® and ViaTrack®

Administrators

No Access
admin
user
guest

SSO Role: admin
Background Business Processor

Utilization dashboard for the Background Business Processor to provide the user with a visual history of jobs on each server and assist with more efficient scheduling.
Q&A