Course Length: 3 Days

Course Objective:

- Application Functionality: Third Party and Patient Payments, Adjustments and Refunds
- Credits Balances
- Collections
- Reporting: General, AR, Monthly and System
- Worklog and Tasking

Target Audience:

- Client Project Manager
- Core Team Members (Decision Makers)
- Key Billing and Collections Personnel

Pre-requisites:

- Understanding of Practice Workflow
- Knowledge of Practice Billing and Collections Requirements
- **Completion of SCT and EPM CGT Training Sessions**
- **All EPM Core eLearning Courses Completed prior to Training**

eLearning:

- Education plans were provided upon eLearning enrollment
  For questions contact learning@nextgen.com

Course Protocol:

- Breaks and lunch will be incorporated throughout the day.
- Clients will have the opportunity to check email and voicemail during this time.

Agenda:

Day 1

- Third Party Transactions: With and without Payer Contracts, Zero, Interest, Withhold, etc.
- Patient Transactions: Payments on Account, Write-offs, NSF, Deposits, etc.
- Credits: Line item, Unapplied and Refunds
- Modifications: Encounter, Transactions, Guarantor, Balance Control

Day 2

- Account Profile: Person and Company/Employer
- Invoices
- Statements
- Collections: Follow-up, Letters, Budget Plans, Bad Debt
- Reports Overview: General, Accounts Receivable, Monthly, and System

Day 3

- Worklog and Tasking:
  - Security and File Maintenance Setup
  - Task Creation: Manual vs. Auto-create
  - Worklog Manager: Working with Tasks
  - Task Reports