User Preferences – General

File Maintenance > Practice Master Files > EPM > Default UserPrefs - General

General User Preferences can be defined in File Maintenance and then assigned to groups of users or individual users in System Administrator. General User Preferences allow the user to set basic options such as logon settings, advisor options, and printing preferences. Some settings are strictly display options while others affect system behavior.

General Tab

![Default User Preferences - General](image_url)
Activated upon Logon

- **Prompt for Session Settings:**
  Select this checkbox to have the Session Settings window display each time the user logs into NEXTGEN® EPM. The Session Settings window allows users to set default parameters for their current login session.

  ![Session Settings](image)

  - **Active Batch:** Select a **Transaction Batch** to be used for transactions entered during the current login session
  - **Service Date:** Select the default **Service Date** to be used for charges entered during the current login session
  - **Process Date:** Select the default **Process Date** to be used for charges entered during the current login session
  - **Service Location:** Select the default **Service Location** to be used for charges entered during the current login session
  - **Batch Info:** Enter a default **Batch Description** to be used for charges entered during the current login session
  - **Suspend EPM/EMR Synchronization:** Select this checkbox if it is desired to stop patient synchronization when toggling between the NEXTGEN® EPM and EHR applications for the current login session only

- **Suspend EPM/EMR Application Synch:**
  Select this checkbox if it is desired to always stop patient synchronization when toggling between the NEXTGEN® EPM and EHR applications.
Main Toolbar Options

- **Toolbar Captions:**
  Select this checkbox to display captions under each icon on the main toolbar.

- **Toolbar Tooltips:**
  Select this checkbox to display a tooltip (secondary description) when the cursor is held over each icon on the main toolbar.

Mail Options

- **Logon to Outlook Mail at Startup:**
  Select this checkbox to have the system logon to Microsoft® Outlook Mail while logging into NEXTGEN® EPM. The user will be able to send NEXTGEN® e-mails and/or Outlook e-mails from the Mailbox icon on the main toolbar.

- **Default:**
  Select the address book to be used as the default when composing e-mails within EPM.

NextGen:

![NextGen Mail Interface](image1)

Outlook:

![Outlook Mail Interface](image2)

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**Batch Posting Default Options**

- **Only Show Batches Secured to Me:**
  This option controls the default setting for the “Only show batches secured to me” checkbox on the Batch Posting window from the Posting icon on the main toolbar. If selected, only those transaction batches secured to the user will display.
• **Place the Active Batch First in the List:**
  This option controls the default setting for the “Place the active batch first in the list” checkbox on the Batch Posting window from the Posting icon on the main toolbar. If selected, the user’s active transaction batch will be displayed first.

![Batch Posting Window](image)

• **Redact EOB with Single Rectangle:**
  This setting impacts the “redacting” (block-out) function during Payment Entry when working with EOB images scanned in NEXTGEN® ICS. If selected, the portion of the EOB drawn by the user will be redacted/blocked-out. If not selected, all but the portion of the EOB drawn by the user will be redacted/blocked-out.
Chart Tab

The settings on this tab affect patient Charts in NEXTGEN® EPM.

- **Default Word Processor:**
  Select the word processor to be used as the default when composing Chart Notes in EPM.

  **WordPad:**
  ![WordPad Chart Notes]

  **Microsoft Word:**
  ![Microsoft Word Chart Notes]

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• **Encounter List Default Display:**
Select the default method of viewing encounters within a patient’s Chart in EPM

**Encounter Date:**

**Encounter Number:**
Printing Tab

The settings on this tab affect print jobs in NEXTGEN® EPM.

Fee Tickets

- **Print Preview:**
  Select this checkbox to preview Fee Tickets on the screen prior to printing. If not selected, Fee Tickets will print without allowing the user to preview them first.

- **Prompt for Options Dialog:**
  Select this checkbox to display the *Print Fee Tickets* window, which allows the user to select an *Alternate Fee Ticket Body* or to change *Printer Settings* prior to printing Fee Tickets.

Printing Preferences

- **Always Use Windows Default Printer:**
  Select this checkbox to have all print jobs directed to the user’s Windows default printer.
Lookup Limits Tab

The settings on this tab affect searches and lookups in NEXTGEN® EPM. If the number of items returned in a search/lookup exceeds the limit defined here, the system will prompt the user to be more specific with their search criteria and the items displayed will be limited to the number defined here.

Each option can have a minimum value of 100 and a maximum value of 3,000. The initial default value is 1000 for all options. The default value can be increased or decreased as needed.

<table>
<thead>
<tr>
<th>Option</th>
<th>Search/Lookup Window</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Account Lookup window</td>
</tr>
<tr>
<td>Appointments</td>
<td>Appointment Lookup window</td>
</tr>
<tr>
<td>Batches</td>
<td>Batch Posting window</td>
</tr>
<tr>
<td>Claim Requests</td>
<td>Claim Request Lookup window</td>
</tr>
<tr>
<td>Eligibility Referral</td>
<td>Eligibility Referral Lookup window</td>
</tr>
<tr>
<td>Encounters</td>
<td>Encounter Lookup window</td>
</tr>
<tr>
<td>Letters</td>
<td>Appointment Reminders, Budget Letters, Batch Collection</td>
</tr>
<tr>
<td></td>
<td>Letters, and Recall Letters windows</td>
</tr>
<tr>
<td>Payers</td>
<td>Payer Lookup window</td>
</tr>
<tr>
<td>People</td>
<td>People and Patient Lookup windows</td>
</tr>
<tr>
<td>Waitlist</td>
<td>Waitlist Lookup window</td>
</tr>
<tr>
<td>Worklog</td>
<td>Worklog Manager window</td>
</tr>
</tbody>
</table>
Advisor Tab

The settings on this tab affect the Advisor window in NEXTGEN® EPM. They control whether or not the window should display upon logon and/or after changing practices. The sections that display on each side of the Advisor window (left/right) can also be customized.

- **Show upon Logon:**
  Select this checkbox to have the Advisor window display each time the user logs into NEXTGEN® EPM.

- **Show after Practice Change:**
  Select this checkbox to have the Advisor window display each time the user changes practices from the Practice icon on the main toolbar.

**Display Options**

The two lists represent the left and right sides of the Advisor window.

- **Left Side Selections:**
  In the list box on the left, select the sections to display on the left side of the Advisor window. Use the blue up/down arrows to put the sections in the desired order.

- **Right Side Selections:**
  In the list box on the right, select the sections to display on the right side of the Advisor window. Use the blue up/down arrows to put the sections in the desired order.
Tasks Tab

The settings on this tab affect the display of the Worklog Manager window in NEXTGEN® EPM.

- **Highlight My Tasks In:**
  Select the color in which tasks assigned to the user should display.

- **Sort Tasks By:**
  Select the sort in which tasks assigned to the user should display.
  - **Assigned To**
  - **Completed By**
  - **Due Date**
  - **Priority**
  - **Source Type**
  - **Status**
  - **Subject**
  - **Task Type**

  The user assigned to the tasks displayed
  The user that completed the tasks displayed
  The due date of the tasks displayed
  The priority of the tasks displayed
  The source type of the tasks displayed
  The status of the tasks displayed
  The subject of the tasks displayed
  The task type name of the tasks displayed
- **Ascending / Descending:**
  Select the order for the sort selected above.

- **Do not Refresh Worklog after Updating Tasks:**
  Select this checkbox to prevent the task list displayed in the Worklog Manager window from refreshing after the user has updated the tasks.

- **Worklog Manager Real Time Column Display:**
  Select the “real-time” columns that should display to the user for each task listed in the Worklog Manager window. Real-time data columns are indicated by a clock icon in the column heading.
Locations Tab

The settings on this tab affect the display of Locations within NEXTGEN® EPM. All Locations for the practice normally display in alphabetical order in any lookup window that includes Location as a search parameter.

If no selections are made in the Preferred Locations section of this tab, all Locations in lookup windows will display to the user in alphabetical order.

- **Preferred Locations:**
  The display order of Locations in lookup windows can be customized for the user. Select the preferred locations and use the blue up/down arrows to put them in the desired display order.

  Selected locations will display first, in the order defined by the user, followed by deselected locations in alphabetical order.
ICS Tab

The settings on this tab affect the NEXTGEN® ICS application. ICS is not used for scanning insurance cards, driver’s licenses or school ID cards into a patient’s chart in NEXTGEN® EPM.

NOTE: Training on NEXTGEN® ICS will be covered in a separate training session.
AutoFlow Sequences Tab

The settings on this tab affect the Check-In and Check-Out AutoFlow Sequences within NEXTGEN® EPM. AutoFlow Sequences define a set series of windows/screens that users will follow when performing the check-in and check-out processes. AutoFlow Sequences are created in File Maintenance and then defined for each location within the practice in Practice Preferences > AutoFlow tab.

**NOTE:** Refer to the “AutoFlow Sequences for Check-In and Check-Out” section of this workbook for more information on the setup of these sequences in File Maintenance.

![AutoFlow Sequences Tab Image]

The settings on this tab affect the Check-In and Check-Out AutoFlow Sequences within NEXTGEN® EPM. AutoFlow Sequences define a set series of windows/screens that users will follow when performing the check-in and check-out processes. AutoFlow Sequences are created in File Maintenance and then defined for each location within the practice in Practice Preferences > AutoFlow tab.

**NOTE:** Refer to the “AutoFlow Sequences for Check-In and Check-Out” section of this workbook for more information on the setup of these sequences in File Maintenance.
- **AutoFlow Sequences for Menu Option “Check-In/Create Encounter”:**
  Select the Check-In AutoFlow Sequence(s) for the user that will be used in place of the sequences defined in Practice Preferences > AutoFlow tab.

- **AutoFlow Sequences for Menu Option “Checkout”:**
  Select the Check-In AutoFlow Sequence(s) for the user that will be used in place of the sequences defined in Practice Preferences > AutoFlow tab.

**System Administrator**

Link User Preferences to Groups and/or Users

**NOTE:** Linking User Preferences to an individual user overrides the preferences linked to that user’s security group.
Individual User Preferences

EPM > Admin > Preferences > User > General

The settings on this tab affect print jobs within NEXTGEN® EPM. Printing preferences for all users within the practice can be defined in Practice Preferences > Printing tab. Printing Preferences defined here for an individual user will override the settings in Practice Preferences.
NOTE: An individual user’s preference settings for the following three options will override the preferences assigned to the Group or User in System Administrator.

**Fee Tickets**

- **Print Preview:**
  Select this checkbox to preview Fee Tickets on the screen prior to printing. If not selected, Fee Tickets will print without allowing the user to first preview them.

- **Prompt for Options Dialog:**
  Select this checkbox to display the Print Fee Tickets window, which allows the user to select an **Alternate Fee Ticket Body** or to change **Printer Settings** prior to printing Fee Tickets.

**Printing Preferences**

- **Always Use Windows Default Printer:**
  Select this checkbox to have all print jobs directed to the user’s Windows default printer.

  **NOTE:** An individual user’s printer preferences will override the same settings defined in Practice Preferences > Printing tab for all users.

**Available Documents**

The various types of documents available for printing in NEXTGEN® EPM are listed.

- **Printer Name / Orientation / Tray / Size / # Copies:**

  To define a printer for a document:
  - Right-click on the *Document* and select *Open* from the menu
  - In the *Print Setup* window, select the desired printer for the document
  - If applicable, select the orientation, tray and number of copies
  - Click *OK*