

How to create a new Financial Fiscal Period

Purpose: Usually the system would have some defaulted current and future fiscal period; however, when the future fiscal period is reached (becomes current) and there is no future period available, user would get some notification/error when doing financial billing process.

Resolution: A user can create future Fiscal period. Here are the steps:

Go to: [Setting](#) > [e-Financial](#) > [Manage Fiscal Period](#)

The screenshot shows the MEDe-care Financial Training Site interface. The top navigation bar includes links for Home, e-ADT, e-Assessments, e-Plan, e-Notes, e-MAR, e-Financials, POC, Wound Tracker, e-Reports, Settings (highlighted with a red box and labeled '1'), My Account, and Admin. Below this, a secondary navigation bar includes Facility, e-ADT, e-Assessments, e-Plan, e-Notes, Relationship Builder, e-MAR, e-Financials (highlighted with a red box and labeled '2'), Security, Lookup Values, POC, and Forms Builder. On the left, a 'Choose an Option' menu (labeled '3') lists various options, with 'Manage Fiscal Periods' highlighted by a red box and an arrow pointing to the main content area. The main content area is titled 'Manage Fiscal Periods' and includes tabs for General Ledger, Accounts Receivable, and Trust. A 'Select Fiscal Year to View/Edit' section contains a table with columns for Fiscal Year, Initial Current Period Date, and Initial Billing Period Date. The table lists years from 2011 (Current) to 2015. A red box highlights the '2011 (Current)' entry in the Fiscal Year column, which has a dropdown arrow. A 'New' button is visible in the top right corner of the table area.

As you can see in the above example, currently there fiscal period create up until 2015. To add future fiscal period i.e. Year 2016 click on 'New', the following screen appears, keep on Clicking on 'Next' until you see the 'Save' button.

Manage Fiscal Periods

Setup Fiscal Periods(GL)

[Next >>](#) [Save](#) [Cancel](#)

Enter a Fiscal Period

Starts on	<input type="text" value="2016-01-01"/>
Ends on	<input type="text" value="2016-12-31"/> 

Fiscal year 2016 is created as follow:

Manage Fiscal Periods

General Ledger

Accounts Receivable

Trust

New

Select Fiscal Year to View/Edit

Fiscal Year	2016
Initial Current Period Date	2011 (Current)
Initial Billing Period Date	2012
	2013
	2014
	2015
	2016

Fiscal Calendar Details(GL)

Starts on 2016-01-01

Ends on 2016-12-31

To continue creating more future fiscal years, click on 'New' again and follow the above steps. User can add as many future period as need.