5.5 Course Catalog

The purpose of these online courses is to introduce users to the NextGen applications and to provide a basic understanding of how to set up and use the applications.

The content is based on Courses that make up the Curricula. A course is the unit of instruction you will go through to finish a specified topic. Courses are represented in the NextGen Learning Center by a red course icon followed by the course title. A Curriculum represents a grouping of courses that relate to a larger, more general, subject area. Curricula are represented by a red course icon with a light blue band. Most of the online courses are brief and focus on one main topic. They will usually take between 15 and 45 minutes to finish, depending on the task being covered. Once you have finished a course, you can refer to it at any time to review what was covered.

<table>
<thead>
<tr>
<th>Curriculum: Application Overviews v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 An Overview of the EHR Application – 30 min.</td>
<td>10</td>
</tr>
<tr>
<td>Course: v5.5 An Overview of the EPM Application – 30 min.</td>
<td>10</td>
</tr>
<tr>
<td>Course: v5.5 How the EPM and EHR Applications Work Together - 15 min.</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Getting Started Setting Up NextGen v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Application Launcher – 15 min.</td>
<td>11</td>
</tr>
<tr>
<td>Course: v5.5 Set DB Application - 15 min.</td>
<td>11</td>
</tr>
<tr>
<td>Course: v5.5 License Manager Application – 15 min.</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: File Maintenance v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Using File Maintenance – 45 min.</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Introduction to NextGen Organizational Levels v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: Determining and Assigning Your Organizational Levels – 45 min</td>
<td>12</td>
</tr>
<tr>
<td>Course: v5.5 Creating Enterprises – 30 min.</td>
<td>12</td>
</tr>
<tr>
<td>Course: v5.5 Creating Practices – 30 min.</td>
<td>13</td>
</tr>
<tr>
<td>Course: v5.5 Creating Locations 25 min.</td>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: EPM Application Basics v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 EPM – Navigating the Application Desktop – 15 min.</td>
<td>13</td>
</tr>
<tr>
<td>Course: v5.5 EPM – Common Buttons Fields and Features – 20 min.</td>
<td>14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: EPM User Preferences Administration v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 EPM - User Preferences Administration – 45 min.</td>
<td>14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Setting Up System Security v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Security - Creating and Managing User Groups – 20 min.</td>
<td>14</td>
</tr>
<tr>
<td>Course: v5.5 Security - Rights and Permissions – 30 min.</td>
<td>15</td>
</tr>
<tr>
<td>Course: v5.5 Security - Password Requirements for Users – 15 min.</td>
<td>15</td>
</tr>
<tr>
<td>Course: v5.5 Security - Creating and Managing Users – 45 min.</td>
<td>15</td>
</tr>
<tr>
<td>Course: v5.5 Security - Patient Sharing – 30 min.</td>
<td>15</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Overview of Payers and Providers v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Overview of the Providers System Master File – 15 min.</td>
<td>16</td>
</tr>
<tr>
<td>Course: v5.5 Overview of the Payers System Master File – 20 min.</td>
<td>16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Code Tables v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Code Tables – 20 min.</td>
<td>16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum: Setting Up Master Lists v5.5</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 Setting Up System Security v5.5</td>
<td>17</td>
</tr>
</tbody>
</table>
Course: v5.5 Master Lists – 30 min. .......................................................... 17
Course: v5.5 Master Lists – Financial Classes – 15 min. ......................... 17

Curriculum: Setting Up System Master Files – EPM v5.5 .......................... 17
Course: v5.5 System Master Files – Autoflow Sequences – 30 min. ............ 18
Course: v5.5 System Master Files – Collection Agencies – 45 min. .......... 18
Course: v5.5 System Master Files – Counters – 15 min. .......................... 18
Course: v5.5 System Master Files – CPT4 Codes – 45 min. ...................... 19
Course: v5.5 System Master Files – Diagnosis Codes – 60 min. ............... 19
Course: v5.5 System Master Files – DME Regions – 20 min. .................... 19
Course: v5.5 System Master Files – Employers – 60 min. ......................... 20
Course: v5.5 System Master Files – Form and Label Templates – 60 min. .... 20
Course: v5.5 System Master Files – Formats – 20 min. ............................. 20
Course: v5.5 System Master Files – Label Products – 30 min. ................... 20
Course: v5.5 System Master Files – Locations – 60 min. ......................... 21
Course: v5.5 System Master Files – Payers Part One – 60 min. ................. 21
Course: v5.5 System Master Files – Payers Part Two – 90 min. ................. 21
Course: v5.5 System Master Files – Providers – 90 min. ......................... 21
Course: v5.5 System Master Files – Revenue Codes – 15 min. ................. 22
Course: v5.5 System Master Files – Sliding Fee Schedules – 60 min. ......... 22
Course: v5.5 System Master Files – Specialties – 15 min. ....................... 22
Course: v5.5 System Master Files – Task Types – 75 min. ....................... 23
Course: v5.5 System Master Files – Taxonomy Codes – 20 min. ............... 23
Course: v5.5 System Master Files – Transaction Codes – 30 min. .......... 23
Course: v5.5 System Master Files – User Note Descriptions – 30 min. ....... 23
Course: v5.5 System Master Files – Zip Codes – 30 min. ....................... 24

Curriculum: Setting Up Practice Master Files v5.5 ................................. 24
Course: v5.5 Practice Master File – Appointment Reminders – 20 min. .......... 24
Course: v5.5 Practice Master File – Dunning Messages – 15 min. .......... 24
Course: v5.5 Practice Master File – Groups – 45 min. .......................... 25
Course: v5.5 Practice Master File - Letters – 30 min. .......................... 25
Course: v5.5 Practice Master File – Market Plan – 15 min. .................... 25
Course: v5.5 Practice Master File – Patient Statuses – 30 min. ............... 25
Course: v5.5 Practice Master File – Recall Plans – 30 min. .................... 26
Course: v5.5 Practice Master File – Report Types – 15 min. ................... 26

Curriculum: EPM Setting Up Libraries v5.5 ........................................ 26
Course: v5.5 Libraries – Anesthesia Modifiers – 45 min. ....................... 27
Course: v5.5 Libraries – Claim Edits – 30 min. .................................... 27
Course: v5.5 Libraries – Claim Printing – 30 min. ............................... 27
Course: v5.5 Libraries - Contracts – 40 min. ....................................... 27
Course: v5.5 Libraries – Diagnosis Codes – 25 min. .......................... 28
Course: v5.5 Libraries – GPCI Codes – 30 min. .................................. 28
Course: v5.5 Libraries – Places of Service – 20 min. ............................ 28
Course: v5.5 Libraries – Reason Codes – 30 min. ............................ 28
Course: v5.5 Libraries – Service Items – 60 min. ............................. 29
Course: v5.5 Libraries – Service Items Exceptions – 30 min. ................ 29
Course: v5.5 Libraries – Service Item Groups – 45 min. ....................... 29
<table>
<thead>
<tr>
<th>Course</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>v5.5 Libraries – Submitter Profiles</td>
<td>30 min.</td>
</tr>
<tr>
<td>v5.5 Libraries – Types of Service</td>
<td>20 min.</td>
</tr>
<tr>
<td>v5.5 Budget Plans - Setting Up the Budget Plan Process</td>
<td>45 min.</td>
</tr>
<tr>
<td>Setting Up Enterprise Preferences</td>
<td>45 min.</td>
</tr>
<tr>
<td>Setting Up Enterprise Preferences – 60 min.</td>
<td></td>
</tr>
<tr>
<td>Setting Up Practice Preferences</td>
<td></td>
</tr>
<tr>
<td>Setting Up Practice Preferences – General Tab – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Alerts Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Appointment Scheduling Tab – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – AutoFlow Tab – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Budget Accounts Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Charge Entry Tab – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Chart Tab – 20 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Contract Edits Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Data and Fee Ticket Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Encounter Tab – 20 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Forms Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Holidays Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Invoices Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Itemized Bills Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Libraries Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Printing Tab – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Provider Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Report Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Specialty Billing Tab Options – 10 min</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Statements Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Tasks Tab – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Transaction Codes Tab – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Setting Up Practice Preferences – Transactions Tab – 45 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appointment Scheduling Basics v5.5</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appointment Scheduling Terms – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appts – Navigating the Appointment Book – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appointment Scheduling Administration v5.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appts – Setting Up the Appointment Book – 120 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Appts – Setting Up the Appointment Wait List – 30 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Creating Fee Tickets v5.</td>
<td>30 min.</td>
</tr>
<tr>
<td>EPM User Preferences v5.</td>
<td>30 min.</td>
</tr>
<tr>
<td>EPM - General User Preferences – 45 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>EPM User Preferences – Appointment Scheduling v5.</td>
<td>30 min.</td>
</tr>
<tr>
<td>EPM - Scheduling User Preferences – 45 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>EPM Demographics – Working with Demographic Information v5.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Demographics - Person Records vs. Patient Charts – 10 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Demographics - Overview of People and Patient Lookup Windows – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Demographics - Adding a New Demographic Record – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Demographics - Overview of the Patient Information Window – 15 min.</td>
<td>30 min.</td>
</tr>
<tr>
<td>Course: v5.5 Demographics - Updating a Patients Address – 15 min.</td>
<td>40</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td>---</td>
</tr>
<tr>
<td>Course: v5.5 Demographics - Overview of the Patient Chart – 15 min.</td>
<td>40</td>
</tr>
<tr>
<td>Curriculum: EPM Insurance – Working with Insurance v5.5</td>
<td>40</td>
</tr>
<tr>
<td>Course: v5.5 Insurance - Adding Insurance – 30 min.</td>
<td>41</td>
</tr>
<tr>
<td>Course: v5.5 Insurance - Adding an Authorization Code – 15 min.</td>
<td>41</td>
</tr>
<tr>
<td>Course: v5.5 Insurance - Adding an Employer with Insurance – 15 min.</td>
<td>41</td>
</tr>
<tr>
<td>Curriculum: EPM Accounts – Working with Guarantor Accounts v5.5</td>
<td>41</td>
</tr>
<tr>
<td>Course: v5.5 Guarantor Accounts – 40 min.</td>
<td>41</td>
</tr>
<tr>
<td>Curriculum: EPM Appointments – Scheduling Appointments v5.5</td>
<td>42</td>
</tr>
<tr>
<td>Course: v5.5 Appts - Scheduling Appointments – 90 min.</td>
<td>42</td>
</tr>
<tr>
<td>Course: v5.3 Printing a Fee Ticket on Demand – 15 min.</td>
<td>42</td>
</tr>
<tr>
<td>Course: v5.5 Appts - Working with the Appointment Wait List – 30 min.</td>
<td>42</td>
</tr>
<tr>
<td>Curriculum: Appointment Follow-up v5.5</td>
<td>42</td>
</tr>
<tr>
<td>Course: v5.5 Appt Follow-up Overview – 20 min.</td>
<td>43</td>
</tr>
<tr>
<td>Course: v5.5 Appt Follow-up - Using Appointment Reminders – 60 min.</td>
<td>43</td>
</tr>
<tr>
<td>Course: v5.5 Appt Follow-up - Using Recall Plans – 60 min.</td>
<td>43</td>
</tr>
<tr>
<td>Course: v5.5 Appt Follow-up - Using Worklog Tasks – 60 min.</td>
<td>43</td>
</tr>
<tr>
<td>Curriculum: EPM Encounters – Working with Encounters v5.5</td>
<td>44</td>
</tr>
<tr>
<td>Course: v5.5 Encounters - Working with the Appointment Wait List – 30 min.</td>
<td>44</td>
</tr>
<tr>
<td>Curriculum: Appointment Follow-up v5.5</td>
<td>44</td>
</tr>
<tr>
<td>Course: v5.5 Encounters - The Create Encounter and Encounter Maintenance Windows – 30 min.</td>
<td>44</td>
</tr>
<tr>
<td>Course: v5.5 Encounters - Checking In Patients and Creating Encounters – 45 min.</td>
<td>44</td>
</tr>
<tr>
<td>Curriculum: EPM Charge Entry – Working with Charges v5.5</td>
<td>44</td>
</tr>
<tr>
<td>Course: v5.5 Charges – Working with Charges –20 min.</td>
<td>45</td>
</tr>
<tr>
<td>Curriculum: EPM Transaction Entry Basics v5.5</td>
<td>45</td>
</tr>
<tr>
<td>Course: v5.5 Transactions - Overview of Payment Processing – 60 min.</td>
<td>45</td>
</tr>
<tr>
<td>Course: Creating and Using Unapplied Credits – 15 min.</td>
<td>45</td>
</tr>
<tr>
<td>Curriculum: EPM Transaction Entry Administration v5.5</td>
<td>45</td>
</tr>
<tr>
<td>Course: v5.5 Transactions - Overview of Payment Processing Setup – 45 min.</td>
<td>46</td>
</tr>
<tr>
<td>Curriculum: EPM Transaction Entry Advanced v5.5</td>
<td>46</td>
</tr>
<tr>
<td>Course: v5.5 Advanced Transactions - Entering Insurance Transactions – 60 min.</td>
<td>46</td>
</tr>
<tr>
<td>Course: v5.5 Advanced Transactions - Working with Line Item Credits – 60 min.</td>
<td>46</td>
</tr>
<tr>
<td>Course: v5.5 Advanced Transactions - Working with Refunds – 30 min.</td>
<td>46</td>
</tr>
<tr>
<td>Course: v5.5 Advanced Transactions - Account Level Transactions – 30 min.</td>
<td>47</td>
</tr>
<tr>
<td>Curriculum: EPM Billing Encounters and Working with Claims v5.5</td>
<td>47</td>
</tr>
<tr>
<td>Course: v5.5 Billing Encounters – 30 min.</td>
<td>47</td>
</tr>
<tr>
<td>Course: v5.5 Claims - Rebilling Encounters and Regenerating Claims – 45 min.</td>
<td>47</td>
</tr>
<tr>
<td>Course: v5.5 Claims - Processing Claims – 30 min.</td>
<td>48</td>
</tr>
<tr>
<td>Course: v5.5 Claims - Set Up for HCFA 1500 Electronic Claims – 90 min.</td>
<td>48</td>
</tr>
<tr>
<td>Course: v5.5 Claims - Set Up for HCFA 1500 Print Claims – 90 min.</td>
<td>48</td>
</tr>
<tr>
<td>Curriculum: EPM Statements – Setting Up Statements v5.5</td>
<td>48</td>
</tr>
<tr>
<td>Course: v5.5 Statements - Setting Up Your Statement Process – 60 min.</td>
<td>48</td>
</tr>
<tr>
<td>Course: v5.5 Statements - Setting Up Payer specific Dunning Messages – 30 min.</td>
<td>49</td>
</tr>
<tr>
<td>Curriculum: EPM Statements – Working with Statements v5.5</td>
<td>49</td>
</tr>
<tr>
<td>Course: v5.5 Statements - Generating Statements in a Batch – 45 min.</td>
<td>49</td>
</tr>
<tr>
<td>Course: v5.5 Statements - Generating an Individual Statement on Demand – 15 min.</td>
<td>49</td>
</tr>
<tr>
<td>Curriculum:  EPM Working with Autoflow v5.5</td>
<td>50</td>
</tr>
<tr>
<td>Course: v5.5 Using the Autoflow Feature – 30 min</td>
<td>50</td>
</tr>
<tr>
<td>Curriculum: Setting Up Master Lists – EHR v5.5</td>
<td>50</td>
</tr>
<tr>
<td>Course: v5.5 System Master Lists – 30 min</td>
<td>50</td>
</tr>
<tr>
<td>Curriculum: Setting Up System Master Files – EHR v5.5</td>
<td>50</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Allergies and Allergy Reactions – 20 min</td>
<td>51</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Counters – 15 min</td>
<td>51</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – CPT4 Codes – 45 min</td>
<td>51</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – DB Picklist Manager - 15 min</td>
<td>52</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Diagnosis Codes – 60 min</td>
<td>52</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Employers – 60 min</td>
<td>52</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Equipment Field Map – 15 min</td>
<td>53</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – External Interface Map – 15 min</td>
<td>53</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Locations – 60 min</td>
<td>53</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Medication Codes – 45 min</td>
<td>53</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Modifiers and Modifier Categories – 45 min</td>
<td>54</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Pharmacies - 20 min</td>
<td>54</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Providers – 90 min</td>
<td>54</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Rx Units – 15 min</td>
<td>55</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Service Categories – 20 min</td>
<td>55</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – SIG Codes – 20 min</td>
<td>55</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Specialties – 15 min</td>
<td>55</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – User Image Description – 15 min</td>
<td>56</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – User Note Descriptions – 30 min</td>
<td>56</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Vaccine Orders – 20 min</td>
<td>56</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – View Categories – 20 min</td>
<td>56</td>
</tr>
<tr>
<td>Course: v5.5 System Master Files – Zip Codes – 30 min</td>
<td>57</td>
</tr>
<tr>
<td>Curriculum: Setting Up Universal Preferences v5.5</td>
<td>57</td>
</tr>
<tr>
<td>Course: v5.5 Universal Preferences – 20 min</td>
<td>57</td>
</tr>
<tr>
<td>Curriculum: EHR Application Basics v5.5</td>
<td>57</td>
</tr>
<tr>
<td>Course: v5.5 EHR - Navigating the Application Desktop – 15 min</td>
<td>57</td>
</tr>
<tr>
<td>Course: v5.5 EHR - Keyboard Shortcuts and Application Views – 15 min</td>
<td>58</td>
</tr>
<tr>
<td>Course: v5.5 EHR - Securing Patient Privacy – 15 min</td>
<td>58</td>
</tr>
<tr>
<td>Curriculum: EHR Medical Record Modules v5.5</td>
<td>58</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Allergies – 25 min</td>
<td>58</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Documents – 15 min</td>
<td>59</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Medications – 30 min</td>
<td>59</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Medications - Optional Module – 90 min</td>
<td>59</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Images – 90 min</td>
<td>59</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Problems – 45 min</td>
<td>60</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Module - Procedures – 20 min</td>
<td>60</td>
</tr>
<tr>
<td>Course: v5.5 Medical Records Modules - Templates – 25 min</td>
<td>60</td>
</tr>
<tr>
<td>Curriculum: EHR Overview of the Patient Demographics Module v5.5</td>
<td>60</td>
</tr>
<tr>
<td>Course: v5.5 EHR - Patient Demographics Module – 40 min</td>
<td>60</td>
</tr>
<tr>
<td>Curriculum: EHR Overview of the Patient Education Module v5.5</td>
<td>61</td>
</tr>
<tr>
<td>Course: v5.5 EHR - Patient Education Module – 30 min</td>
<td>61</td>
</tr>
</tbody>
</table>

Proprietary and Confidential information for use by NextGen Healthcare Information Systems, Inc. and its clients. Reprint only with permission.
Curriculum: EHR Using the Workflow Module v5.5 ................................................................. 61
  Course: v5.5 EHR Workflow Module - Appointments – 15 min. ........................................ 61
  Course: v5.5 EHR Workflow Module - Inbox – 15 min. .................................................... 62
  Course: v5.5 EHR Workflow Module - Tasks – 30 min. .................................................... 62
Curriculum: EHR Provider Approval Queue - Setup ............................................................... 62
  Course: v5.5 Provider Approval Queue Setup – 15 min. .................................................... 62
Curriculum: EHR Provider Approval Queue for End Users .................................................... 63
  Course: v5.5 Provider Approval Queue for End Users – 30 min. ...................................... 63
Curriculum: EHR User Preferences v5.5 ................................................................................. 63
  Course: v5.5 EHR User Preferences - General Tab – 10 min. ............................................ 63
  Course: v5.5 EHR User Preferences - Templates Tab – 15 min. ....................................... 64
  Course: v5.5 EHR User Preferences - Medical Records Tab – 15 min. ............................ 64
  Course: v5.5 EHR User Preferences - Medication Tab – 30 min. ..................................... 64
  Course: v5.5 EHR User Preferences - Formulary Tab – 10 min. ....................................... 64
Curriculum: EHR Working with Encounters v5.5 ................................................................. 65
  Course: v5.5 EHR Main Toolbar - History Toolbar – 20 min. ............................................. 65
  Course: v5.5 EHR Encounter Basics – 20 min. ................................................................. 65
  Course: v5.5 EHR Encounters – Custom and Addendum – 15 min. ............................... 65
  Course: v5.5 EHR Encounters - Customizing the View – 10 min. .................................... 65
Curriculum: EHR Encounter Workflows v5.5 .................................................................... 66
  Course: v5.5 EHR Encounter Workflow – 45 min. .......................................................... 66
  Course: v5.5 EHR Encounter Workflow - Procedure – 30 min. ....................................... 66
  Course: v5.5 EHR Encounter Workflow - Telephone – 30 min. ....................................... 66
Curriculum: EHR Template Editor v5.5 ............................................................................... 67
  Course: v5.5 Template Editor - Working with Templates – 45 min. ................................. 67
  Course: v5.5 Template Editor – Menu Bars and Toolbars – 60 min. ............................... 67
  Course: v5.5 Template Editor – Tools Menu – 45 min. ...................................................... 67
  Course: v5.5 Template Editor – Adding Fields to a Template – 60 min. ......................... 68
  Course: v5.5 Template Editor – Basic Triggers – 60 min. ............................................... 68
Curriculum: EHR Template Import / Export Utility v5.5 ....................................................... 68
  Course: v5.5 Template Import Export Utility – 15 min. .................................................... 68
Curriculum: EHR Document Builder v5.5 ............................................................................. 68
  Course: v5.5 EHR Document Builder – Basics – 45 min. ................................................... 69
  Course: v5.5 EHR Document Builder – Working with the Document Builder – 30 min. ... 69
  Course: v5.5 EHR Document Builder – Basic Macros – 40 min. ................................. 69
  Course: v5.5 EHR Document Builder – Import Export Utility – 15 min. ......................... 69
Curriculum: KBM Templates v5.5 ....................................................................................... 69
  Course: v5.5 KBM Templates – Assessments 7.7 – 60 min. ............................................. 70
  Course: v5.5 KBM Templates – Document Library 7.7 – 30 min. ................................. 70
  Course: v5.5 KBM Templates – Family History 7.7 - 30 min. ......................................... 70
  Course: v5.5 KBM Templates – Health Maintenance 7.7 - 30 min. ............................... 70
  Course: v5.5 KBM Templates – HPI 7.7 - 30 min. .......................................................... 71
  Course: v5.5 KBM Templates – Immunizations 7.7 – 60 min. ....................................... 71
  Course: v5.5 KBM Templates – Past Medical History 7.7 - 30 min. ............................. 71
  Course: v5.5 KBM Templates – Physical Exam 7.7 - 30 min. .......................................... 72
  Course: v5.5 KBM Templates – Problem List 7.7 - 30 min. ............................................ 72
<table>
<thead>
<tr>
<th>Course: v5.5 KBM Templates – Procedures 7.7 - 30 min.</th>
<th>72</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course: v5.5 KBM Templates – Review of Systems 7.7 - 30 min.</td>
<td>72</td>
</tr>
<tr>
<td>Course: v5.5 KBM Templates – Social History 7.7 - 30 min.</td>
<td>73</td>
</tr>
<tr>
<td>Curriculum: KBM Workflows v5.5</td>
<td>73</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Behavioral Health Intake 7.7 –90 min.</td>
<td>74</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Behavioral Health Initial Psych Evaluation 7.7 –90 min.</td>
<td>74</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow - Cardiology 7.7 – 90 min.</td>
<td>74</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Correctional Health Management 7.7 – 80 min.</td>
<td>74</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Dermatology 7.7 – 90 min.</td>
<td>75</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – ENT 7.7 – 90 min.</td>
<td>75</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Gastroenterology 7.7 – 90 min</td>
<td>75</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – General Surgery 7.7 – 90 min.</td>
<td>76</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Gynecology 7.7 – 90 min.</td>
<td>76</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Internal Medicine / Family Practice 7.7 – 90 min.</td>
<td>76</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Neurology 7.7 – 90 min.</td>
<td>76</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Neurosurgery 7.7 – 90 min.</td>
<td>77</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Obstetrics 7.7 – 90 min.</td>
<td>77</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Oncology 7.7 – 90 min.</td>
<td>77</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Ophthalmology 7.7 –95 min.</td>
<td>78</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow - Ophthalmology ASC 7.7 –60 min.</td>
<td>78</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow - Ophthalmology Retina 7.7 –90 min.</td>
<td>78</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Orthopedics 7.7 – 90 min.</td>
<td>79</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Pediatrics 7.7 – 90 min.</td>
<td>79</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Physical Therapy 7.7 – 60 min.</td>
<td>79</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Pulmonary 7.7 – 90 min.</td>
<td>80</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Rheumatology 7.7 – 90 min.</td>
<td>80</td>
</tr>
<tr>
<td>Course: v5.5 KBM Workflow – Urology 7.7 – 90 min.</td>
<td>80</td>
</tr>
<tr>
<td>Curriculum: CHC Setup for Billing and Reporting v5.5</td>
<td>81</td>
</tr>
<tr>
<td>Course: v5.5 CHC Overview of Community Health Center Setup - 15 min</td>
<td>81</td>
</tr>
<tr>
<td>Course: v5.5 CHC Government Payer Setup - 30 min.</td>
<td>81</td>
</tr>
<tr>
<td>Course: v5.5 CHC Encounter Rate Billing Setup – 45 min.....</td>
<td>81</td>
</tr>
<tr>
<td>Course: v5.5 CHC Encounter Tracking Setup - 45 min.</td>
<td>82</td>
</tr>
<tr>
<td>Course: v5.5 CHC Sliding Fee and Flat Rate Sliding Fee Setup - 90 min.</td>
<td>82</td>
</tr>
<tr>
<td>Curriculum: Working with Bad Debt Encounters v5.5</td>
<td>82</td>
</tr>
<tr>
<td>Course: v5.5 Bad Debt - Working with Bad Debt - 30 min.</td>
<td>83</td>
</tr>
<tr>
<td>Curriculum: EPM Employer and Company Accounts v5.5</td>
<td>83</td>
</tr>
<tr>
<td>Course: v5.4 Billing Employer and Company Accounts – 30 min.</td>
<td>83</td>
</tr>
<tr>
<td>Curriculum: EPM Worklog v5.5</td>
<td>83</td>
</tr>
<tr>
<td>Course: v5.5 Worklog Administration – 60 min.</td>
<td>83</td>
</tr>
<tr>
<td>Course: v5.5 Using Worklog Manager– 45 min.</td>
<td>84</td>
</tr>
<tr>
<td>Curriculum: EPM Reports v5.5</td>
<td>84</td>
</tr>
<tr>
<td>Course: v5.5 Reports - Working with EPM Reports - 60 min.</td>
<td>84</td>
</tr>
<tr>
<td>Course: v5.5 Reports – Working with AR Reports – 60 min.</td>
<td>84</td>
</tr>
<tr>
<td>Course: v5.5 Reports – Working with Daily Reports – 30 min.</td>
<td>85</td>
</tr>
<tr>
<td>Course: v5.5 Reports – Working with Monthly Reports – 60 min.</td>
<td>85</td>
</tr>
<tr>
<td>Course: v5.5 Reports – Troubleshooting Your EPM Reports – 15 min.</td>
<td>85</td>
</tr>
</tbody>
</table>

Proprietary and Confidential information for use by NextGen Healthcare Information Systems, Inc. and its clients. Reprint only with permission.
Curriculum: RTS Real time Transaction Server v5.5 ................................................................. 85
  Course: v5.5 RTS - Realtime Transaction Server Setup – 60 min. ........................................... 86
  Course: v5.5 RTS - Real time Transaction Server End User – 90 min. ...................................... 86
Curriculum: EPM Background Business Processor v5.5 .......................................................... 86
  Course: v5.4 Background Business Processor Setup – 45 min. .............................................. 86
  Course: v5.4 Background Business Processor – Packages and Jobs – 30 min. ...................... 87
  Course: v5.4 Background Business Processor – Copying Packages, Jobs and Schedules – 60 min. ......................................................................................................................... 87
Curriculum: EHR User Defined SIG Codes v5.5 .................................................................... 87
  Course: v5.5 EHR – Building User Defined SIG Codes – 45 min. .......................................... 87
Curriculum: EHR Labs v5.5 ....................................................................................................... 87
  Course: v5.5 Labs - System Master Files – 90 min. ................................................................. 88
  Course: v5.5 Labs - Labs Module – 60 min. ............................................................................ 88
  Course: v5.5 Labs - Lab Assign Module – 60 min. ................................................................. 88
  Course: v5.5 Lab Master Template – Adding New Lab Tests and Triggers – 90 min. ............ 89
Curriculum: EHR Working with Family Units v5.5 ................................................................. 89
  Course: v5.5 EHR Setting Up Family Unit and Alias – 45 min. ............................................... 89
Curriculum: Note File Monitor Utility v5.5 ............................................................................. 87
  Course: v5.5 Note File Monitor Utility – 60 min. ................................................................. 89
Curriculum: RTF File Monitor Utility v5.5 ............................................................................ 90
  Course: v5.5 RTF File Monitor Utility – 60 min. ................................................................. 90
  Course: v5.3 Creating RTF File Headers – 45 min. ............................................................... 90
Curriculum: EHR NextGen Audit Utility v5.5 ....................................................................... 90
  Course: v5.5 NextGen Audit Utility – 30 min. ................................................................... 90
Curriculum: Fax Manager Utility v5.5 .................................................................................. 91
  Course: v5.5 Fax Integration Services - Setup – 90 min. ........................................................ 91
  Course: v5.5 NextGen CoverPage Editor Utility – 20 min. .................................................. 91
Curriculum: EHR Reports v5.5 .............................................................................................. 91
  Course: v5.4 EHR Reports – Working with EHR Reports 60 min. ...................................... 91
Curriculum: NextGen ICS v5.5 ............................................................................................. 92
  Course: v5.5 ICS - Set Up – 90 min. .................................................................................... 92
  Course: v5.5 ICS - Application Training – 90 min. ............................................................... 92
  Course: v5.5 ICS - Setup for Attaching an EOB Scan to an Encounter – 60 min. ................. 92
  Course: v5.5 ICS - Attaching an EOB Scan to an Encounter – 60 min. ....................... 93
Curriculum: Optik v5.5 ........................................................................................................ 93
  Course: v5.5 Optik Overview – 60 min. .............................................................................. 93
  Course: v5.5 Optik Set Up – 60 min. .................................................................................. 93
  Course: v5.5 Optik Advanced Features – 45 min. ............................................................... 93
Curriculum: ePrescribing v5.5 ............................................................................................. 94
  Course: v5.5 ePrescribing – ExpressRx Setup – 30 min. .................................................... 94
  Course: v5.5 ePrescribing – ExpressRx End User – 60 min. .............................................. 94
  Course: v5.5 ePrescribing with NextGen – 45 min. ............................................................ 94
Individual Courses ................................................................................................................ 95
  Course: v5.5 Claims – Assigning CLIA Numbers – 30 min. .............................................. 95
  Course: v5.5 Claims – Assigning Mammography Numbers – 30 min. ............................ 95
  Course: v5.5 Claims – Dental Billing – 45 min. ............................................................... 95
Course: v5.5 Claims – DME Billing – 30 min................................................................. 96
Course: v5.5 Claims – Provider Based Billing – 45 min............................................. 96
Course: v5.5 Claims - Supervisor Billing – 30 min....................................................... 96
Course: v5.5 Claims – UB Billing – 45 min................................................................. 96
Course: v5.5 Claims – Workers Compensation Billing – 20 min............................ 97
Course: v5.5 EHR Offline Document Processor – 45 min........................................ 97
Course: v5.5 ERA - Processing Electronic Remittance Advices – 60 min............... 97
Course: v5.5 ERA - Setting Up Electronic Remittance Advices – 60 min............... 97
Course: v5.5 Graphing in NextGen EHR – 60 min...................................................... 98
Course: v5.5 Overview of Credits in the EPM Application – 15 min....................... 98
Course: v5.5 Region Editor – 30 min.......................................................................... 98
Course: v5.5 Scanning in EHR Without ICS – 30 min............................................. 98
Course: v5.5 Setting Up EPM and EHR to Work Together – 60 min....................... 98
Course: v5.5 The NextGen Billing and Collection Process – 30 min....................... 99
Course: v5.5 Using the SIM Global Update – 20 min.............................................. 99
Curriculum: Application Overviews v5.5
This curriculum focuses on how to access the NextGen applications and databases. It includes the following NextGen Learning Center online courses:

- v5.5 An Overview of the EHR Application
- v5.5 An Overview of the EPM Application
- v5.5 How EPM and EHR Work Together

Course: v5.5 An Overview of the EHR Application – 30 min.
An overview of the Electronic Health Records (EHR) application.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
- Describe the architecture of the EHR application.
- Describe how EHR handle workflow.
- Describe how EHR captures patient information.
- Describe ways EHR exchanges information with other systems.
- Describe how EHR provides security and patient privacy.

Course: v5.5 An Overview of the EPM Application – 30 min.
An overview of the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
- List elements of the EPM application.
- Match each element of the EPM application with its function.

Course: v5.5 How the EPM and EHR Applications Work Together - 15 min.
An overview of how the EPM and EHR applications work together.
Suggested Prerequisites: v5.5 A Tour of the EPM Application, v5.5 A Tour of the EHR Application
Applications Involved: EPM and EHR
Approximate Length: 30 min
Course Objectives:
- List the EPM application functions.
- List the EHR application functions.
- List ways that the EPM and EHR applications work together.
- v5.5 Application Launcher
- v5.5 Set DB Application
- v5.5 License Manager Application

**Course: v5.5 Application Launcher – 15 min.**
Covers how to sign on to the various NextGen applications using the NextGen Application Launcher.
Suggested Prerequisites: None
Applications Involved: EHR and EPM
Approximate Length: 15 min
Course Objectives:
- Open the Application Launcher from your desktop or from the Windows toolbar.
- Review the Legal Disclaimer window.
- Sign on to a NextGen application by using your user name/password combination, or your PIN.
- Customize the Application Launcher menu with your preferred applications.
- Create desktop shortcuts for the NextGen applications.

**Course: v5.5 Set DB Application - 15 min.**
Introduces you to working with the different databases used for production, template development, claims testing, and new-release testing. The SetDB (Set Database) Application enables you to work with each of these databases without manually changing NextGen configuration files.
Suggested Prerequisites: Application Launcher
Applications Involved: EHR and EPM
Approximate Length: 15 min
Course Objectives:
- Describe the purpose of the SetDB application.
- List the different NextGen databases.
- Identify how databases are used.
- Switch between the NextGen databases your practice uses.

**Course: v5.5 License Manager Application – 15 min.**
Covers the License Manager Application, which enables you to apply and validate licenses for the NextGen products.
Suggested prerequisites: Application Launcher
Applications involved: EHR and EPM
Approximate length: 15 min
Course Objectives:
- Open the License Manager Application from the NextGen Application Launcher.
- View license information for the available NextGen products.
- Apply a new license key for a NextGen product.
Curriculum:  File Maintenance v5.5
This curriculum focuses on navigating the File Maintenance application. It includes the following NextGen Learning Center online course:

- v5.5 Using File Maintenance

Course: v5.5 Using File Maintenance – 45 min.
Covers how to navigate and enter information in File Maintenance.
Suggested Prerequisites: Determining and Assigning Your Organizational Levels, Application Launcher.
Applications Involved: EHR and EPM
Approximate Length: 45 min
Course Objectives:
- Access the File Maintenance application.
- Identify the four main parts of the File Maintenance interface.
- Access lists of codes.
- Open, modify, create, and hide specific codes.
- Use the File Maintenance Menu options.

Curriculum: Introduction to NextGen Organizational Levels v5.5
This curriculum focuses on setting up the various organizational levels of the NextGen applications. It includes the following NextGen Learning Center online courses:

- Determining and Assigning Your Organizational Levels
- v5.5 Creating Enterprises
- v5.5 Creating Practices
- v5.5 Creating Locations

Course: Determining and Assigning Your Organizational Levels – 45 min
Covers how to determine the NextGen hierarchical setup for your organization.
Suggested Prerequisites: None
Applications Involved: EHR and EPM
Approximate Length: 45 min
Course Objectives:
- Identify the hierarchical order of NextGen organizational levels.
- Decide at which level to share your demographic data.
- Label each level of your organization using NextGen terms

Course: v5.5 Creating Enterprises – 30 min.
Covers how to set up an Enterprise.
Suggested Prerequisites: Determining and Assigning Your Organizational Levels, Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 30 min
Course Objectives:
• Define an Enterprise as it applies to NextGen applications.
• Identify and collect the information needed to set up an Enterprise.
• Create and modify Enterprises in the File Maintenance application.

Course: v5.5 Creating Practices – 30 min.
Covers how to set up a Practice.
Suggested Prerequisites: Determining and Assigning Your Organizational Levels, Using File Maintenance, Creating Enterprises
Applications Involved: EHR and EPM
Approximate Length: 30 min
Course Objectives:
• Define a Practice as it applies to NextGen applications.
• Identify and collect the information needed to set up a Practice.
• Create and modify Practices in the File Maintenance application.

Course: v5.5 Creating Locations 25 min.
Covers how to set up Locations.
Suggested Prerequisites: Determining and Assigning Your Organizational Levels, Using File Maintenance, Creating Enterprises, Creating Practices
Applications Involved: EHR and EPM
Approximate Length: 25 min
Course Objectives:
• Define a Location as it applies to NextGen applications.
• Identify and collect the information needed to set up a Location.
• Modify and create Locations in the File Maintenance application.

Curriculum: EPM Application Basics v5.5
This curriculum focuses on the EPM application desktop menus and toolbars, along with shortcuts that can be used to access application functions. It includes the following NextGen Learning Center online courses:

• v5.5 EPM – Navigating the Application Desktop
• v5.5 EPM – Common Buttons Fields and Features

Course: v5.5 EPM – Navigating the Application Desktop – 15 min.
Covers the components of the EPM application desktop and how to navigate through the EPM application.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 15 min.
Course Objectives:
• Define components of the EPM application desktop.
Course: v5.5 EPM – Common Buttons Fields and Features – 20 min.
Covers the common buttons and standard features that help users work efficiently in the EPM application.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Identify and use the common buttons and standard features in the EPM application.
• Customize the display to suit your needs.

Curriculum: EPM User Preferences Administration v5.5
This curriculum focuses on administrator options to limit or influence the setting of user preferences in the NextGen EPM application. It includes the following online courses:

• v5.5 EPM - User Preferences Administration

Course: v5.5 EPM - User Preferences Administration – 45 min.
Covers setting up default user preferences and controlling permissions for setting up user preferences in the NextGen Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Applications Involved: EPM
Approximate length: 45 min.
Course Objectives:
• Define the EPM User Preferences Administration as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Create Default User Preferences in the File Maintenance application.
• Assign Default User Preferences to a group or individual in the System Administrator application.
• Modify a group's permission to set User Preferences.

Curriculum: Setting Up System Security v5.5
This curriculum focuses on setting up application users and other security options. It includes the following NextGen Learning Center online courses:

• v5.5 Security - Creating and Managing User Groups
• v5.5 Security - Security Rights and Permissions
• v5.5 Security - Password Requirements for Users
• v5.5 Security - Creating and Managing Users
• v5.5 Security - Patient Sharing

Covers how to create, modify, copy, and delete User Groups using the System Administrator application.
Suggested Prerequisites: None
Applications Involved: EHR and EPM
Approximate Length: 20 min
Course Objectives:
• Define the concept of User Groups based on the examples provided.
• Create, modify, and delete user groups.
• Add existing user groups from other practices.

Course: v5.5 Security - Rights and Permissions – 30 min.
Covers how to set up security rights and permissions for user groups using the System Administrator application.
Suggested Prerequisites: Creating and Managing User Groups
Applications Involved: EHR and EPM
Approximate Length: 30 min
Course Objectives:
• Assign rights and permissions for modules.
• Assign rights and permissions for operations.
• Import rights and permissions from one group to another.

Course: v5.5 Security - Password Requirements for Users – 15 min.
Covers the issues to consider when setting password requirements for secure user sign on.
Suggested Prerequisites: None
Applications Involved: EHR and EPM
Approximate Length: 15 min
Course Objectives:
• Understand the need for secure passwords.
• Identify Do's and Don'ts for setting up user passwords.
• Determine and assign password requirements to establish secure user sign on.

Course: v5.5 Security - Creating and Managing Users – 45 min.
Covers how to create, modify, delete, and restore users using the System Administrator application.
Suggested Prerequisites: Creating and Managing User Groups, Security Rights and Permissions, Password Requirements for Users
Applications Involved: EHR and EPM
Approximate Length: 45 min
Course Objectives:
• Create new user accounts.
• Modify existing user accounts.
• Delete and restore users.
• Add existing users from another practice.

Course: v5.5 Security - Patient Sharing – 30 min.
Covers how to specify which lists of patients a user can view while working in the NextGen applications.
Suggested Prerequisites: Creating and Managing User Groups, Creating and Managing Users
Applications Involved: EHR and EPM
Approximate Length: 30 min

Course Objectives:
- Set up patient inclusion and exclusion lists at the Practice level.
- Set up patient inclusion and exclusions lists at the User level.

Curriculum: Overview of Payers and Providers v5.5

Many parts of the NextGen application setup call for you to associate items to providers or third party payers. This curriculum gives you an overview of how providers and payers are used in NextGen. Later curricula in other sections will delve into setting up these Provider and Payer System Master Files. This curriculum includes the following NextGen Learning Center online courses:

- v5.5 Overview of the Providers System Master File
- v5.5 Overview of the Payers System Master File

Course: v5.5 Overview of the Providers System Master File – 15 min.

Covers a general overview of the Providers System Master File.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 15 min
Course Objectives:
- Define a Provider as it applies to NextGen applications.
- State the licensing options for your providers.
- Understand the Providers Master File window.

Course: v5.5 Overview of the Payers System Master File – 20 min.

Covers a general overview of the Payers System Master File.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 20 min
Course Objectives:
- Define a Payer as it applies to NextGen applications.
- State the Payer System Master File.
- Determine how many Payers you will need to set up.
- Understand the Payers System Master File window.

Curriculum: Code Tables v5.5

This curriculum focuses on understanding Code Tables found in the File Maintenance application. It includes the following NextGen Learning Center online course:

- v5.5 Code Tables

Course: v5.5 Code Tables – 20 min.

Covers the Code Tables found in the File Maintenance application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 20 min
Course Objectives:
• Define items in the Code Tables as they apply to the NextGen application.

Curriculum: Setting Up Master Lists v5.5
This curriculum focuses on setting up Master Lists using the File Maintenance application. It includes the following NextGen Learning Center online courses:

• v5.5 System Master Lists
• v5.5 System Master List – Financial Classes

Course: v5.5 Master Lists – 30 min.
Covers how the master lists are used and information needed for setup.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 30 min
Course Objectives:
• Define items in the Master Lists as they apply to the NextGen application.

Course: v5.5 Master Lists – Financial Classes – 15 min.
Covers how the master list for Financial Classes is used and information needed for setup.
Suggested Prerequisites: Using File Maintenance, Master Lists
Applications Involved: EPM
Approximate Length: 15 min
Course Objectives:
• Define a Financial Class as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Financial Classes.
Create and modify Financial Classes in the File Maintenance application.

Curriculum: Setting Up System Master Files – EPM v5.5
This curriculum focuses on setting up System Master Files using the File Maintenance application. This curriculum includes the following NextGen Learning Center online courses:

• v5.5 System Master Files - Autoflow Sequences
• v5.5 System Master Files - Collection Agencies
• v5.5 System Master Files - Counters
• v5.5 System Master Files - CPT4 Codes
• v5.5 System Master Files – Diagnosis Codes
• v5.5 System Master Files - DME Regions
• v5.5 System Master Files – Employers
• v5.5 System Master Files - Form and Label Templates
• v5.5 System Master Files - Formats
• v5.5 System Master Files - Label Products
Course: v5.5 System Master Files – Autoflow Sequences – 30 min.
Covers how to set up the system level master file Autoflow Sequences in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define an Autoflow Sequence as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Autoflow Sequences.
• Create and modify AutoFlow Sequences.

Course: v5.5 System Master Files – Collection Agencies – 45 min.
Covers how to set up the system level master file Collection Agencies in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 45 min.
Course Objectives:
• Define a Collection Agency as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up specified System Master File.
• Create and modify Collection Agencies in the File Maintenance application.

Course: v5.5 System Master Files – Counters – 15 min.
Covers how to set up the system level master file Counters in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min.
Course Objectives:
• Define how Counters are used in the NextGen applications.
• Locate the Counters System Master File.
• Grant access to Counters in the File Maintenance application.
• Know how to set Counters for different elements of the NextGen applications.

Course: v5.5 System Master Files – CPT4 Codes – 45 min.
Covers how to set up the system level master file CPT4 Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 45 min.
Course Objectives:
• Define a CPT4 Code as it applies to the NextGen applications.
• Identify and collect the information needed to set up CPT4 Codes.
• Create, modify, and hide CPT4 Codes in the File Maintenance application.

Course: v5.5 System Master Files – Diagnosis Codes – 60 min.
Covers how to set up the system level master file ICD9CM Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
• Define an ICD9CM code as it applies to the NextGen Enterprise Practice Management (EPM) and Electronic Health Records (EHR) applications.
• Identify and collect the information needed to set up ICD9CM Codes.
• Create and modify ICD9CM Codes in the File Maintenance application.
• Define a Diagnosis Category, Diagnosis Severity, and Diagnosis Status as they apply to the NextGen EHR application.
• Identify and collect the information needed to set up Diagnosis Categories, Severities, and Statuses (for EHR users).
• Create and modify Diagnosis Categories, Severities, and Statuses in the File Maintenance application (for EHR users).

Course: v5.5 System Master Files – DME Regions – 20 min.
Covers how to set up the system level master file DME Regions in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Define a DME Region as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up DME Regions.
• Create and modify DME Regions in the File Maintenance application.

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Course: v5.5 System Master Files – Employers – 60 min.
Covers how to set up the system level master file Employers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
• Define an Employer as it applies to the NextGen applications.
• Identify and collect the information needed to set up Employers.
• Create and modify Employers in the File Maintenance application.

Course: v5.5 System Master Files – Form and Label Templates – 60 min.
Covers how to set up the system level master file Form Templates and Label Templates in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 60 min.
Course Objectives:
• Define a Form or Label Template as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Form or Label Templates.
• Create and modify Form or Label Templates in the File Maintenance application.

Course: v5.5 System Master Files – Formats – 20 min.
Covers how to set up the system level master file Formats in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Define a Format as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Create and modify Formats in the File Maintenance application.
• Identify how to attach a Format to a Payer.

Course: v5.5 System Master Files – Label Products – 30 min.
Covers how to set up the system level master file Label Products in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define a Label Product as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Label Products.
• Create and modify Label Products in the File Maintenance application.

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Course: v5.5 System Master Files – Locations – 60 min.
Covers how to set up the system level master file Locations in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
- Define a Location as it applies to the NextGen applications.
- Identify and collect the information needed to set up Locations, whether as a service location or facility.
- Create and modify Locations in the File Maintenance application.

Course: v5.5 System Master Files – Payers Part One – 60 min.
Covers how to set up the Default Tab and Defaults 2 Tab of the system level master file Payers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
- Define a Payer as it applies to NextGen applications.
- State the uses of the Payers System Master File.
- Determine how many Payers you will need to set up.
- Understand the Payers System Master File window.
- Access and set up the Payer Defaults 1 and 2 tabs.

Course: v5.5 System Master Files – Payers Part Two – 90 min.
Covers how to set up the System Parameters, Practice Parameters, Alternate Payer, and External Tabs of the system level master file Payers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 90 min.
Course Objectives:
- Understand the Payers System Master File window.
- Access and set up the following Payer tabs
  - System Parameters
  - Practice Parameters
  - Alternate Payer
  - External

Course: v5.5 System Master Files – Providers – 90 min.
Covers how to set up the Demographics, System, Notes and Provider Tabs of the system level master file Providers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 90 min.
Course Objectives:
• Define a Provider as it applies to NextGen applications.
• State the licensing options for your providers.
• Understand the Providers Master File window.
• Identify and collect the information needed to set up Providers.
• Create and modify Providers in the File Maintenance application.

Course: v5.5 System Master Files – Revenue Codes – 15 min.
Covers how to set up the system level master file Revenue Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min.
Course Objectives:
• Define Revenue Codes as they applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Revenue Codes.
• Create and modify Revenue Codes in the File Maintenance application.

Course: v5.5 System Master Files – Sliding Fee Schedules – 60 min.
Covers how to set up the system level master file Sliding Fee Schedules in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 60 min.
Course Objectives:
• Define a Sliding Fee Schedules as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Sliding Fee Schedules.
• Create and modify Sliding Fee Schedules in the File Maintenance application.
• Understand how the two types of Sliding Fee Schedules can affect a patient’s charges in EPM.

Course: v5.5 System Master Files – Specialties – 15 min.
Covers how to set up the system level master file Specialties (provider) in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 15 min.
Course Objectives:
• Define Specialties as they pertain to the NextGen EPM application.
• Identify and collect the information needed to set up Specialties.
• Create and modify Specialties in the File Maintenance application.
• Attach a specialty to a rendering Provider in the Providers section in the File Maintenance application.
Course: v5.5 System Master Files – Task Types – 75 min.
Covers how to set up the system level master file Task Types in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 75 min.
Course Objectives:
• Define a Task Type as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Task Types.
• Create and modify Task Types in the File Maintenance application.

Course: v5.5 System Master Files – Taxonomy Codes – 20 min.
Covers how to set up the system level master file Taxonomy Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Define a Taxonomy Code as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Taxonomy Codes.
• Create and modify Taxonomy Codes in the File Maintenance application.

Course: v5.5 System Master Files – Transaction Codes – 30 min.
Covers how to set up the system level master file Transaction Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define a Transaction Code as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Understand the difference between a system-generated transaction code and a user created transaction code.
• Identify and collect the information needed to set up Transaction Codes.
• Create and modify Transaction Codes in the File Maintenance application.

Course: v5.5 System Master Files – User Note Descriptions – 30 min.
Covers how to set up the system level master file User Note Descriptions in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Locate the User Note Descriptions System Master File.
• Define how User Note Descriptions are used in the applications.
• Grant users access to User Note Descriptions in the File Maintenance application.
• Create User Note Descriptions.

Course: v5.5 System Master Files – Zip Codes – 30 min.
Covers how to set up the system level master file Zip Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 30 min.
Course Objectives:
• Define a Zip Code as it applies to the NextGen applications.
• Identify and collect the information needed to set up specified Zip Codes.
• Create and modify the Zip Codes in the File Maintenance application.
• Create a zip code ‘on the fly’ from within another application.

Curriculum: Setting Up Practice Master Files v5.5
This curriculum focuses on setting up Practice Master Files using the File Maintenance application. The courses cover how the practice master files are used and the information needed for set up. This curriculum includes the following NextGen Learning Center online courses:

• v5.5 Practice Master File - Appointment Reminders
• v5.5 Practice Master File - Dunning Messages
• v5.5 Practice Master File - Groups
• v5.5 Practice Master File - Letters
• v5.5 Practice Master File - Market Plans
• v5.5 Practice Master File - Patient Statuses
• v5.5 Practice Master File - Recall Plans
• v5.5 Practice Master File - Report Types

Course: v5.5 Practice Master File – Appointment Reminders – 20 min.
Covers the practice master file Appointment Reminders found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min
Course Objectives:
• Define an Appointment Reminder letter as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Appointment Reminders.
• Assign, un-assign, and preview Appointment Reminder letters in the File Maintenance application.

Course: v5.5 Practice Master File – Dunning Messages – 15 min.
Covers the practice master file Dunning Messages found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min
Course Objectives:
• Understand how dunning messages are used with statements.
• Identify and collect the information needed to set up Dunning Messages.
• Create and modify Dunning Messages.

Course: v5.5 Practice Master File – Groups – 45 min.
Covers the practice master file Groups found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 45 min
Course Objectives:
• Understand how to set up Groups for billing insurance.
• Identify and collect the information needed to set up Groups.
• Create and modify Groups in the File Maintenance application.

Course: v5.5 Practice Master File - Letters – 30 min.
Covers the practice master file Letters found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• Define a letter as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Letters.
• Create and modify Letters.

Course: v5.5 Practice Master File – Market Plan – 15 min.
Covers the practice master file Market Plan found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min
Course Objectives:
• Define a marketing plan as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Marketing Plans.
• Create and modify Marketing Plans.

Course: v5.5 Practice Master File – Patient Statuses – 30 min.
Covers the practice master file Patient Statuses found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• Define a patient status as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Patient Statuses.
• Create and modify Patient Statuses.

Course: v5.5 Practice Master File – Recall Plans – 30 min.
Covers the practice master file Recall Plans found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• Define a recall plan as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Recall Plans.
• Create and modify Recall Plans.

Course: v5.5 Practice Master File – Report Types – 15 min.
Covers the practice master file Report Types found in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min
Course Objectives:
• Define a report type as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Report Types.
• Create and modify Report Types.

Curriculum: EPM Setting Up Libraries v5.5
This curriculum focuses on setting up Libraries using the File Maintenance application. It includes the following NextGen Learning Center online courses.

• v5.5 Libraries - Anesthesia Modifiers
• v5.5 Libraries - Claim Edits
• v5.5 Libraries - Claim Printing
• v5.5 Libraries - Contracts
• v5.5 Libraries - Diagnosis Codes
• v5.5 Libraries - GPCI Codes
• v5.5 Libraries - Places of Service
• v5.5 Libraries - Reason Codes
• v5.5 Libraries - Service Items
• v5.5 Libraries - Service Item Exceptions
• v5.5 Libraries - Service Item Groups
• v5.5 Libraries - Submitter Profiles
• v5.5 Libraries - Types of Service
v5.5 Budget Plans - Setting Up the Budget Plan Process

Course: v5.5 Libraries – Anesthesia Modifiers – 45 min.
Covers how to set up Anesthesia Modifiers Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: Applications Involved: EPM
Approximate Length: 45 min.
Course Objectives:
• Define an Anesthesia Modifiers Library as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up an Anesthesia Modifiers Library.
• Create and modify an Anesthesia Modifiers Library.

Course: v5.5 Libraries – Claim Edits – 30 min.
Covers how to set up Claim Edit Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define what claim edits are and what their function is.
• Understand the purpose of claim production status report and how it works in conjunction with claim edits
• Understand the various settings and fields of a claim edit.
• Create Claim Edit Libraries in NextGen.
• Assign certain Claim Edits to specific practices or payers.

Course: v5.5 Libraries – Claim Printing – 30 min.
Covers how to set up Claim Printing Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define the function and purpose of the claim print library.
• Understand the various options and settings of a claim print library.
• Create Claim Print Libraries in NextGen.
• Assign certain Claim Printing options to specific practices or payers.

Course: v5.5 Libraries - Contracts – 40 min.
Covers how to set up Contact Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 40 min.
Course Objectives:
• Define a Contract Library as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Contracts.
• Create and modify Contract Libraries in the File Maintenance application.

Course: v5.5 Libraries – Diagnosis Codes – 25 min.
Covers how to set up Diagnosis Code Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM and EHR
Approximate Length: 25 min.
Course Objectives:
• Define diagnosis codes as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Diagnosis Codes.
• Create and modify Diagnosis Codes.

Course: v5.5 Libraries – GPCI Codes – 30 min.
Covers how to set up GPCI Code Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM and EHR
Approximate Length: 30 min.
Course Objectives:
• Define GPCI codes as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up GPCI Codes.
• Create and modify GPCI Codes.

Course: v5.5 Libraries – Places of Service – 20 min.
Covers how to set up Place of Service Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Define Places of Service codes as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Place of Service Libraries.
• Create and modify Place of Service Libraries.

Course: v5.5 Libraries – Reason Codes – 30 min.
Covers how to set up Reason Code Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define reason codes as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Reason Codes.
• Create and modify Reason Code Libraries in the File Maintenance application.

**Course: v5.5 Libraries – Service Items – 60 min.**
This course is an overview of Service Item Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM and EHR
Approximate Length: 60 min.
Course Objectives:
• Define the concept of a Service Item Library and a Service Item Member.
• Create, modify, and copy a service item.
• Assign Practice Access to a Service Item Library.
• Assign a default Service Item Library in practice preferences.

**Course: v5.5 Libraries – Service Items Exceptions – 30 min.**
Covers how to set up Service Item Exceptions.
Suggested Prerequisites: Using File Maintenance, Libraries – Service Item Basic Set Up
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Define a Service Item (SIM) Exception as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Service Item Exceptions.
• Create and modify Service Item Exceptions in the File Maintenance application.

**Course: v5.5 Libraries – Service Item Groups – 45 min.**
Covers how to set up Service Item Groups.
Suggested Prerequisites: Using File Maintenance, Libraries – Service Item Basic Set Up
Applications Involved: EPM
Approximate Length: 45 min.
Course Objectives:
• Define a Service Item (SIM) Group as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Service Item Groups.
• Create and modify Service Item Groups in the File Maintenance application.

**Course: v5.5 Libraries – Submitter Profiles – 30 min.**
Covers how to set up Submitter Profile Libraries.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
• Understand the basics of electronic claims.
• Understand the purpose of Submitter Profiles in electronic claim filing.
• Understand the structure of an electronic claim.
• Set up Submitter Profile Libraries.

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• Access the NextGen HIPAA Desk profile documents.

**Course: v5.5 Libraries – Types of Service – 20 min.**
Covers how to set up Types of Service Libraries
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Define Types of Service codes as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Types of Service Libraries.
• Create and modify Types of Service Libraries.

**Course: v5.5 Budget Plans - Setting Up the Budget Plan Process – 45 min.**
Covers how to set up the Budget Plan Process in the EPM application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: Applications Involved: EPM
Approximate Length: 45 min.
Course Objectives:
• Discuss the Budget Plan Process.
• Set up defaults for the Budget Plan Process.
• Set up Budget Plan letters.
• Set up Budget Plan statements.
• Set up Budget Plan tasks.
• Work with budget reports.

**Curriculum: Setting Up Enterprise Preferences v5.5**
This curriculum focuses on setting up your NextGen Enterprise Preferences using the File Maintenance application. It includes the following NextGen Learning Center online course:

• v5.5 Setting Up Enterprise Preferences

**Course: v5.5 Setting Up Enterprise Preferences – 60 min.**
In this course, you will learn about the setup options in Enterprise Preferences. These settings apply to your entire NextGen enterprise.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min
Course Objectives:
• Access the Enterprise Preferences window.
• Set Enterprise General Preference options.
• Add client-defined fields to your application.
• Understand how to create stored procedures to add to your checkout autoflow process.
• Rename your Relative Value Curriculum (RVU) fields.
• Set enterprise-wide Image Control System (ICS) options (if purchased).
Curriculum: Setting Up Practice Preferences v5.5

This curriculum focuses on setting up your NextGen Practice Preferences. It includes the following NextGen Learning Center online courses:

- v5.5 Setting Up Practice Preferences - General Tab
- v5.5 Setting Up Practice Preferences - Alerts Tab
- v5.5 Setting Up Practice Preferences - Appointment Scheduling Tab
- v5.5 Setting Up Practice Preferences - AutoFlow Tab
- v5.5 Setting Up Practice Preferences - Budget Accounts Tab
- v5.5 Setting Up Practice Preferences - Charge Entry Tab
- v5.5 Setting Up Practice Preferences - Chart Tab
- v5.5 Setting Up Practice Preferences - Contract Edits Tab
- v5.5 Setting Up Practice Preferences - Data and Fee Ticket Tab
- v5.5 Setting Up Practice Preferences - Encounter Tab
- v5.5 Setting Up Practice Preferences - Forms Tab
- v5.5 Setting Up Practice Preferences - Invoices Tab
- v5.5 Setting Up Practice Preferences - Itemized Bills Tab
- v5.5 Setting Up Practice Preferences - Libraries Tab
- v5.5 Setting Up Practice Preferences - Printing Tab
- v5.5 Setting Up Practice Preferences - Provider Tab
- v5.5 Setting Up Practice Preferences - Reports Tab
- v5.3 Setting Up Practice Preferences - Specialty Billing Tab Options
- v5.5 Setting Up Practice Preferences - Statements Tab
- v5.5 Setting Up Practice Preferences - Tasks Tab
- v5.5 Setting Up Practice Preferences - Transaction Codes Tab
- v5.5 Setting Up Practice Preferences - Transactions Tab

Course: v5.5 Setting Up Practice Preferences - General Tab – 30 min.

Covers the setup options of the Practice Preferences General tab.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
- Access the Practice Preferences General tab window.
- Set General Practice Preference options.
- Set up your statement exporting delimiters and text qualifiers.

Course: v5.5 Setting Up Practice Preferences - Alerts Tab – 15 min.

In this course, you will learn about the option settings on the Practice Preferences Alerts tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
- Perform the steps to access the Alerts Preferences tab.
Recall the different types of alerts.
Determine when to use the different types of alerts.
Perform the steps to activate alerts.

Course: v5.5 Setting Up Practice Preferences - Appointment Scheduling Tab – 30 min.
In this course, you will learn about the option settings on the Practice Preferences Appointment Scheduling tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 30 min
Course Objectives:
• Perform the steps to access the Appointment Scheduling Preferences tab.
• Perform the steps to set up user-defined fields.
• Recall the descriptions of the Defaults fields.
• Perform the steps to set up the general rules that will be enforced when appointments are being scheduled.
• State the effects of the Appointment Search Options.
• Perform the steps to select the required fields on appointments and linked appointments.

Course: v5.5 Setting Up Practice Preferences - AutoFlow Tab – 30 min.
In this course you will learn about the setting options of the Practice Preferences AutoFlow tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 30 min
Course Objectives:
• Access the Practice Preferences AutoFlow tab window.
• Assign Autoflow sequences for both the check-in and check-out processes.
• Assign Autoflow sequences to <All Locations> versus an individual location.

Course: v5.5 Setting Up Practice Preferences - Budget Accounts Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Budget Accounts tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Budget Accounts tab.
• Perform the steps to activate required and default fields.

Course: v5.5 Setting Up Practice Preferences - Charge Entry Tab – 30 min.
In this course you will learn about the setting options of the Practice Preferences Charge Entry tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 30 min
Course Objectives:
• Access the Practice Preferences Charge Entry tab window.
• Determine your practice's Charge Entry option preferences.

Course: v5.5 Setting Up Practice Preferences - Chart Tab – 20 min.
In this course you will learn about the setting options of the Practice Preferences Chart tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 20 min
Course Objectives:
• Access the Practice Preferences Chart tab window.
• Determine medical record number preferences.
• Add custom fields to charts.
• Configure general chart options.
• Determine how to use the Appointment Event SIM Carryover functionality.

Course: v5.5 Setting Up Practice Preferences - Contract Edits Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Contract Edits tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Contract Edits Preferences tab.
• Perform the steps to activate contract edits.

Course: v5.5 Setting Up Practice Preferences - Data and Fee Ticket Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Data/Fee Ticket tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Data/Fee Ticket Preferences tab.
• Determine the position for a header image and text.
• Determine which format options to use for system generated Fee Ticket.

Course: v5.5 Setting Up Practice Preferences - Encounter Tab – 20 min.
In this course you will learn about the setting options of the Practice Preferences Encounter tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 20 min
Course Objectives:
• Access the Practice Preferences Encounter tab window.
• Add custom fields to encounters.
• Configure general encounter options.
• Set up encounters for UB92 billing.

Course: v5.5 Setting Up Practice Preferences - Forms Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Forms tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Forms Preferences tab.
• Set the options for certain fields on system generated letters and forms.
• Set credit card acceptance options to print on the header of system generated letters and forms.

Course: v5.5 Setting Up Practice Preferences - Holidays Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Holidays tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Holidays Preferences tab.
• Create and apply practice specific holidays.

Course: v5.5 Setting Up Practice Preferences - Invoices Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Invoices tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Invoices Preferences tab.
• Establish invoice minimum balances and printing options.
• Determine which option to use to update the status and history for invoices.

Course: v5.5 Setting Up Practice Preferences - Itemized Bills Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Itemized Bills tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 10 min
Course Objectives:
• Perform the steps to access the Itemized Bills Preferences tab.
• Establish itemized bill print options.
• Determine whether to create itemized bills for self pay patients during the normal practice billing process.
Course: v5.5 Setting Up Practice Preferences - Libraries Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Libraries tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 10 min
Course Objectives:
• Perform the steps to access the Libraries Preferences tab.
• Set the practice default libraries.
• Set the option for additional fields to appear in the Service Item Library to be used for reporting purposes.

Course: v5.5 Setting Up Practice Preferences - Printing Tab – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Printing tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 10 min
Course Objectives:
• Perform the steps to access the Printing Preferences tab.
• Perform the steps to assign a default printer to different types of documents including labels and letters.

Course: v5.5 Setting Up Practice Preferences - Provider Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Provider tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Provider Preferences tab.
• Add custom labels to define providers associated with patients.

Course: v5.5 Setting Up Practice Preferences - Report Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Reports tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Reports Preferences tab.
• Designate reports to be accessed from a report server only.

Course: v5.3 Setting Up Practice Preferences – Specialty Billing Tab Options – 10 min.
In this course, you will learn about the option settings on the Practice Preferences Specialty Billing tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 10 min

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Course Objectives:
• Perform the steps to access the Specialty Billing Preferences tab.

Course: v5.5 Setting Up Practice Preferences - Statements Tab – 15 min.
In this course, you will learn about the option settings on the Practice Preferences Statements tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Statement Preferences tab.
• Establish statement minimum balances and format options.
• Assign practice default statement dunning messages.
• Set the options to create statements per provider, patient or location.

Course: v5.5 Setting Up Practice Preferences - Tasks Tab – 30 min.
In this course, you will learn about the option settings on the Practice Preferences Tasks tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Perform the steps to access the Tasks Preferences tab.
• Set the options for required fields.

Course: v5.5 Setting Up Practice Preferences - Transaction Codes Tab – 15 min.
In this course you will learn about the setting options of the Practice Preferences Transaction Codes tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 15 min
Course Objectives:
• Access the Practice Preferences Transactions tab window.
• Assign Default Transaction Codes.
• Determine System Generated Transaction Codes.

Course: v5.5 Setting Up Practice Preferences - Transactions Tab – 45 min.
In this course you will learn about the setting options of the Practice Preferences Transactions tab.
Suggested prerequisites: None
Applications involved: EPM
Approximate length: 45 min
Course Objectives:
• Access the Practice Preferences Transaction Codes tab window.
• Assign Default Transaction Codes.
• Set Default Transaction Spreading options.
• Determine System Generated Transaction Codes.
• Set up Reason Code options.

Curriculum: Appointment Scheduling Basics v5.5
This curriculum focuses on familiarizing the student with the Appointment Scheduling process. It includes the following NextGen Learning Center online courses:

• Appointment Scheduling Terms
• v5.5 Appts - Navigating the Appointment Book

Course: Appointment Scheduling Terms – 15 min.
Covers the terms used in Appointment Scheduling.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 15 min
Course Objectives:
• Define a resource as it applies to Appointment Scheduling in the Enterprise Practice Management (EPM) application.
• Define an event as it applies to Appointment Scheduling in the EPM application.
• Define an event chain as it applies to Appointment Scheduling in the EPM application.
• Define a category as it applies to Appointment Scheduling in the EPM application.
• Define a location as it applies to Appointment Scheduling in the EPM application.

Course: v5.5 Appts – Navigating the Appointment Book – 30 min.
Covers the functions of the appointment book toolbar and the different ways to view appointments in the Appointment Book.
Suggested Prerequisites: Appointment Scheduling Terms
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• State the names of the six views available in the Appointment Book.
• State how to switch between different views.
• State the uses for each view.
• Match the toolbar icons with their names and functions.

Curriculum: Appointment Scheduling Administration v5.5
This curriculum focuses on setting up Appointment Scheduling. It includes the following NextGen Learning Center online courses:

• v5.5 Appts - Setting Up the Appointment Book
• v5.5 Appts - Setting Up the Appointment Wait List

Course: v5.5 Appts - Setting Up the Appointment Book – 120 min.
Covers Setting up the Appointment book for use.
Suggested Prerequisites: Appointment Scheduling Terms
Applications Involved: EPM
Approximate Length: 120 min
Course Objectives:
• Define and set up default Practice Preferences options for Appointment Scheduling.
• Define and set up Appointment Scheduling User Preferences.
• Define and set up Scheduling Administration options.

**Course: v5.5 Appts - Setting Up the Appointment Wait List – 30 min.**
Covers Setting up the Appointment Wait List for use.
Suggested Prerequisites: Appointment Scheduling Terms
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• Set up Wait List Defaults.
• Set up the real-time Wait List Process.

**Curriculum: Creating Fee Tickets v5.5**
This curriculum focuses on creating fee tickets in the NextGen EPM application. It includes the following NextGen Learning Center online course:

• Creating Fee Tickets

**Course: Creating Fee Tickets – 30 min.**
Covers creating fee tickets in the EPM Application.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 30 min
Course Objectives:
• Define a Fee Ticket as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Identify and collect the information needed to set up Fee Tickets.
• Create the body of a Fee Ticket using the Microsoft Excel template.
• Import the Fee Ticket body into the EPM application.

**Curriculum: EPM User Preferences v5.5**
This curriculum focuses on the general user preferences that give the individual user options for designating how items look and respond in the NextGen EPM application. It includes the following online courses:

• v5.5 EPM - General User Preferences

**Course: v5.5 EPM - General User Preferences – 45 min.**
Covers setting up user preferences in the NextGen Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Applications Involved: EPM
Approximate length: 45 min.
Course Objectives:
- Define the EPM General User preferences as they apply to the NextGen Enterprise Practice Management (EPM) application.
- Customize EPM General User Preferences to enable you to be more efficient.

Curriculum: EPM User Preferences – Appointment Scheduling v5.5
This curriculum focuses on the Appointment Scheduling User Preferences and includes the following online course:

- v5.5 EPM - Scheduling User Preferences

Course: v5.5 EPM - Scheduling User Preferences – 45 min.
Covers the options available in appointment scheduling user preferences.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 45 min.
Course Objectives:
- Define the EPM Scheduling User preferences as they apply to the NextGen Enterprise Practice Management (EPM) application.
- Customize EPM Scheduling User Preferences to enable you to be more efficient when scheduling patients.

Curriculum: EPM Demographics – Working with Demographic Information v5.5
This curriculum focuses on familiarizing the learner with how to locate a person’s record in the EPM application along with how to add and update their demographic information. This curriculum includes the following NextGen Learning Center online courses:

- v5.5 Demographics – Person Records vs. Patient Charts
- v5.5 Demographics - Overview of People and Patient Lookup Windows
- v5.5 Demographics - Adding a New Demographic Record
- v5.5 Demographics - Overview of the Patient Information Window
- v5.5 Demographics - Updating a Patients Address
- v5.5 Demographics - Overview of the Patient Chart

Course: v5.5 Demographics - Person Records vs. Patient Charts – 10 min.
Covers the basic terminology and structure used by NextGen to manage demographic information related to a patient’s visit to a practice.
Suggested prerequisites: None
Approximate length: 10 min
Course Objectives:
- Describe the difference between a Person record and a Patient chart.
- Describe how patient-related demographic data is accessed within the NextGen application.
Course: v5.5 Demographics - Overview of People and Patient Lookup Windows – 15 min.
Covers the different ways to search for a person and then view their demographic and chart information in the EPM application.
Suggested prerequisites: Understanding Demographics – People Records vs. Patient Charts
Approximate length: 15 min.
Course Objectives:
  • Access the People and Patient Lookup windows.
  • Define the components of the People and Patient Lookup windows.

Course: v5.5 Demographics - Adding a New Demographic Record – 15 min.
Covers adding a new demographic record to the Master Person Index (MPI).
Suggested prerequisites: Understanding Demographics – People Records vs. Patient Charts
Approximate length: 15 min.
Course Objectives:
  • Add a new person to the Master Person Index (MPI).
  • Define the components of the Patient Information window.

Course: v5.5 Demographics - Overview of the Patient Information Window – 15 min.
Covers the Patient Information window.
Suggested prerequisites: Understanding Demographics – People Records vs. Patient Charts
Approximate length: 15 min.
Course Objectives:
  • Define the components of the Patient Information window.
  • Easily locate information on the Patient Information window.

Course: v5.5 Demographics - Updating a Patient’s Address – 15 min.
Covers updating patient and relationship addresses in the applications.
Suggested prerequisites: Understanding Demographics – People Records vs. Patient Charts
Approximate length: 15 min.
Course Objectives:
  • Modify a patient's address.
  • Update the addresses of the relationships attached to a patient.

Course: v5.5 Demographics - Overview of the Patient Chart – 15 min.
Covers patient charts in the EPM application.
Suggested prerequisites: Understanding Demographics – People Records vs. Patient Charts
Approximate length: 15 min.
Course Objectives:
  • Access a patient's chart.
  • Define components of the patient chart.

Curriculum: EPM Insurance – Working with Insurance v5.5
This curriculum focuses on familiarizing the learner with insurance maintenance.
It includes the following NextGen Learning Center online course:
• v5.5 Insurance - Adding Insurance
• v5.5 Insurance - Adding an Authorization Code
• v5.5 Insurance - Adding an Employer with Insurance

Course: v5.5 Insurance - Adding Insurance – 30 min.
Introduction to the Insurance Maintenance Window and covers adding insurance to a person.
Suggested prerequisites: none
Approximate length: 30 min.
Course Objectives:
• Attach insurance to a person's demographic record.
• Define the components and fields of the Insurance Maintenance window.

Course: v5.5 Insurance - Adding an Authorization Code – 15 min.
Covers adding an authorization code to a person’s insurance.
Suggested prerequisites: v5.5 Insurance - Adding Insurance
Approximate length: 15 min.
Course Objectives:
• Create and attach an authorization code to a person's insurance.
• Define the components of the Authorization Code Tracking window.
• Identify the locations in the chart in which you can view an authorization code.

Course: v5.5 Insurance - Adding an Employer with Insurance – 15 min.
Covers adding Employer Insurance to a person.
Suggested prerequisites: v5.5 Insurance - Adding Insurance
Approximate length: 15 min.
Course Objectives:
• Attach an employer with insurance to a person's demographic record.

Curriculum: EPM Accounts – Working with Guarantor Accounts v5.5
This curriculum focuses on guarantor accounts. It includes the following NextGen Learning Center online courses:

• v5.5 Guarantor Accounts

Course: v5.5 Guarantor Accounts – 40 min.
Covers guarantor accounts that are a part of the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 40 min
Course Objectives:
• Identify a guarantor.
• Describe a guarantor's account.
• Recall the information found on an account.
• Recall the steps to search for an account.

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Curriculum: EPM Appointments – Scheduling Appointments v5.5
This curriculum focuses on the Appointment Scheduling function of the EPM application. It includes the following online courses:

- v5.5 Appts - Scheduling Appointments
- v5.3 Printing a Fee Ticket on Demand
- v5.5 Appts - Working with the Appointment Wait List

Course: v5.5 Appts - Scheduling Appointments – 90 min.
Covers the basics of working with appointments in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 90 min
Course Objectives:
- Add an appointment.
- Edit and reschedule an appointment.
- Cancel and delete an appointment.
- Create a set of recurring appointments.
- Search ahead for appointment time slots.
- Work with adding appointment-related information on the tabs of the Add/Edit Appointment window.

Course: v5.3 Printing a Fee Ticket on Demand – 15 min.
Covers how to print fee tickets on demand from various areas of the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 15 min.
Course Objectives:
Print a fee ticket for an individual appointment and encounter.

Course: v5.5 Appts - Working with the Appointment Wait List – 30 min.
Covers adding, editing, deleting and processing Appointment Wait List items in the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 30 min.
Course Objectives:
- Add a wait-list item.
- Modify, view, and delete wait-list items.
- Work with the Wait List Report.
- Work a wait-list task.

Curriculum: Appointment Follow-up v5.5
This curriculum focuses on the Appointment Scheduling function of the EPM application. It includes the following online courses:
• v5.5 Appt Follow-up Overview
• v5.5 Appt Follow-up Using Appointment Reminders
• v5.5 Appt Follow-up Using Recall Plans
• v5.5 Appt Follow-up Using Worklog Tasks

Course: v5.5 Appt Follow-up Overview – 20 min.
Overview of appointment follow-up procedures in the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Applications Involved: EPM
Approximate Length: 20 min.
Course Objectives:
• Run an Appointments Listing report.
• Generate Appointment Reminder letters.
• Create Recall Plans.
• Creating Worklog Tasks to notify appropriate practice personnel of appointment follow-ups to be completed.

Course: v5.5 Appt Follow-up - Using Appointment Reminders – 60 min.
Covers creating and generating Appointment Reminder letters in the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 60 min.
Course Objectives:
• Create custom appointment reminder letters and mailing labels.
• Designate the parameters for when each of your appointment reminder letters should be used.
• Generate your appointment letters and labels as a batch or on demand.

Course: v5.5 Appt Follow-up - Using Recall Plans – 60 min.
Cover working with Recall Plans in the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 60 min.
Course Objectives:
• Create custom appointment recall plan letters and mailing labels.
• Designate the parameters for when each of your recall plans should be used.
• Generate your recall plan letters and labels as a batch or on demand.

Course: v5.5 Appt Follow-up - Using Worklog Tasks – 60 min.
Covers using the worklog to coordinate appointment follow-up in the Enterprise Practice Management (EPM) application.
Suggested Prerequisites: None
Approximate Length: 60 min.
Course Objectives:
• Generate appointment follow-up tasks as a batch based on the results pulled up on the Appointments Listing report.
• Set up tasks as Appointment Reminders that "autocreate" a task a designated number of days prior to a patient's appointment date.
• Generate tasks in accordance with the patients' Recall Plan.

Curriculum: EPM Encounters – Working with Encounters v5.5
This curriculum focuses on familiarizing the learner with creating and working with encounters in the EPM application. It includes the following NextGen Learning Center online courses:

• v5.5 Encounters - Overview of Encounters
• v5.5 Encounters - The Create Encounter and Encounter Maintenance Windows
• v5.5 Encounters - Checking In Patients and Creating Encounters

Course: v5.5 Encounters - Overview of Encounters – 15 min.
This course will familiarize you with encounters in the EPM application.
Suggested prerequisites: None
Approximate length: 15 min
Course Objectives:
• Identify the use of an encounter in the EPM application.

Course: v5.5 Encounters - The Create Encounter and Encounter Maintenance Windows – 30 min.
Covers the encounter and encounter maintenance windows in the EPM application.
Suggested prerequisites: EPM - Overview of Encounters
Approximate length: 30 min.
Course Objectives:
• Define the components of the Create Encounter and Encounter Maintenance windows.

Course: v5.5 Encounters - Checking In Patients and Creating Encounters – 45 min.
Covers checking in new and existing patients and creating encounters in the EPM application.
Suggested prerequisites: EPM - Overview of Encounters
Approximate length: 45 min.
Course Objectives:
• Access the Checkin / Create Encounter AutoFlow process from the NextGen EPM Appointment Book.
• Complete information on the Create Encounter and Patient Information windows.
• Check in and create encounters for new and existing patients.
• Create encounters for patients that are not listed in the Appointment Book.

Curriculum: EPM Charge Entry – Working with Charges v5.5
This curriculum focuses on familiarizing the learner with how to create and work with charges in the Enterprise Practice Management (EPM) application. It includes the following online courses:

• v5.5 Charges – Working with Charges
Course: v5.5 Charges – Working with Charges – 20 min.
Covers the charge entry window and entering, deleting, and voiding charges in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 20 min
Course Objectives:
- Define the components of the Charge Posting window.
- Enter a new charge for an encounter.
- Describe the difference between deleting and voiding a charge.
- Delete a charge.
- Void a charge.

Curriculum: EPM Transaction Entry Basics v5.5
This curriculum focuses on familiarizing the learner with how to enter and balance transaction batches in the Enterprise Practice Management (EPM) application. It includes the following online courses:

- v5.5 Transactions - Overview of Payment Processing
- Creating and Using Unapplied Credits

Course: v5.5 Transactions - Overview of Payment Processing – 60 min.
Covers processing payments and their related adjustments and refunds in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Create transaction batches.
- Enter basic payment, adjustment, and refund transactions.
- Balance transaction batches and post the transactions to the A/R.

Course: Creating and Using Unapplied Credits – 15 min.
Covers how to create and apply unapplied credits. Unapplied credits are patient payments that have not been applied to a charge.
Suggested prerequisites: v5.5 Transactions – Overview of Payment Processing
Approximate length: 15 min.
Course Objectives:
- Create an unapplied credit.
- Apply the unapplied credit to a charge.

Curriculum: EPM Transaction Entry Administration v5.5
This curriculum focuses on familiarizing the learner with how to set up the Enterprise Practice Management (EPM) application to properly enter and balance transaction batches. It includes the following online courses:

- v5.5 Transactions - Overview of Payment Processing Setup

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Course: v5.5 Transactions - Overview of Payment Processing Setup – 45 min.
Covers setting up the Enterprise Practice Management (EPM) application to be able to process payments and their related adjustments and refunds.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
• Determine the types of codes you will need to set up in order to properly process payment.
• Determine the security setting options available for payment processing.
• Determine the system setup issues you will need to address to meet the specific payment processing needs of your office flow.

Curriculum: EPM Transaction Entry Advanced v5.5
This curriculum covers more in depth features of transaction entry in the Enterprise Practice Management (EPM) application. It includes the following online courses:

• v5.5 Advanced Transactions - Entering Insurance Transactions
• v5.5 Advanced Transactions - Working with Line Item Credits
• v5.5 Advanced Transactions - Working with Refunds
• v5.5 Advanced Transactions - Account Level Transactions

Course: v5.5 Advanced Transactions - Entering Insurance Transactions – 60 min.
Covers how to enter a transaction from an Insurer.
Suggested prerequisites: v5.5 Transactions – Overview of Payment Processing
Approximate length: 60 min.
Course Objectives:
• State the names and define the fields in Payment Entry that are specific to insurance transactions.
• Enter a transaction from a third party payer with a contract attached.
• Enter a transaction from a third party payer using reason codes and alternate statuses on a line item basis.

Course: v5.5 Advanced Transactions - Working with Line Item Credits – 60 min.
Covers how to transition a credit from one line item to another using both adjustment and payment transaction codes.
Suggested prerequisites: v5.5 Transactions – Overview of Payment Processing
Approximate length: 60 min.
Course Objectives:
• State the definition of a line item credit.
• Transition a line item credit using two transaction codes, a debit and a credit.
• Transition a line item credit using an individual transaction code with "allow sign over-ride" rights.

Course: v5.5 Advanced Transactions - Working with Refunds – 30 min.
Covers how to create a refund transaction.
Suggested prerequisites: v5.5 Transactions – Overview of Payment Processing
Approximate length: 30 min.
Course Objectives:
• Create a refund transaction for a patient.
• Create a refund transaction for a payer.

Course: v5.5 Advanced Transactions - Account Level Transactions – 30 min.
Covers how to enter payments at the account level.
Suggested prerequisites: v5.5 Transactions – Overview of Payment Processing
Approximate length: 30 min.
Course Objectives:
• Access an archived statement for an account.
• Enter a transaction for multiple encounters under an individual account at one time.
• View account-level transactions in the Account Profile window.

Curriculum: EPM Billing Encounters and Working with Claims v5.5
This curriculum focuses on familiarizing the learner with how to bill encounters and process claims in the Enterprise Practice Management (EPM) application. It includes the following online courses:

• v5.5 Billing Encounters
• v5.5 Claims - Rebilling Encounters and Regenerating Claims
• v5.5 Claims - Processing Claims
• v5.5 Claims - Set Up for HCFA 1500 Electronic Claims
• v5.5 Claims - Set Up for HCFA 1500 Print Claims

Course: v5.5 Billing Encounters – 30 min.
Covers how to bill encounters using the NextGen EPM (Enterprise Practice Management) application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
• How to look up and bill encounters in a batch.
• How to access and bill a single encounter on demand.

Course: v5.5 Claims - Rebilling Encounters and Regenerating Claims – 45 min.
Covers how to rebill encounters and to regenerate archived claims using the NextGen EPM (Enterprise Practice Management) application.
Suggested prerequisites: None
Approximate length: 45 min
Course Objectives:
• Understand the basic steps and billing concepts used in rebilling and regenerating claims.
• Understand how to look up archived claims and flag them to be rebilled.
• Understand how to rebill encounters in a batch and 'on demand.'.
• Understand how to look up and regenerate archived claims in a batch and 'on demand.'
Course: v5.5 Claims - Processing Claims – 30 min.
Covers how to process paper and electronic claims using the NextGen EPM (Enterprise Practice Management) application.
Suggested prerequisites: None
Approximate length: 30 min
Course Objectives:
• Understand the basic steps and billing concepts used in processing claims to be printed to paper or added to an electronic claims file.
• Understand how to look up and print claims in a batch and 'on demand.'
• Understand how to build an electronic claim send file for submission.

Course: v5.5 Claims - Set Up for HCFA 1500 Electronic Claims – 90 min.
Covers how to set up claims to be submitted electronically using the HCFA 1500 claim form.
Suggested prerequisites: None
Approximate length: 90 min
Course Objectives:
• Assign default claim-related libraries to the practice.
• Fill in the relevant payer information.
• Establish any provider billing groups you plan to use.
• Fill in the relevant provider information.

Course: v5.5 Claims - Set Up for HCFA 1500 Print Claims – 90 min.
Covers how to set up claims to be mailed using a printed HCFA 1500 claim form.
Suggested prerequisites: None
Approximate length: 90 min
Course Objectives:
• Assign default claim-related libraries to the practice.
• Fill in the relevant payer information.
• Establish any provider billing groups you plan to use.
• Fill in the relevant provider information.

Curriculum: EPM Statements – Setting Up Statements v5.5
This curriculum focuses on familiarizing the learner with how to set up statements in the Enterprise Practice Management (EPM) application. It includes the following online courses:

• v5.5 Statements - Setting Up Your Statement Process
• v5.5 Statements - Setting Up Payer Specific Dunning Messages

Course: v5.5 Statements - Setting Up Your Statement Process – 60 min.
This course covers how to set up your statement process in the NextGen Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Describe key components of the statement process.
• Set up your NextGen statement cycle.
• Customize your NextGen statement.
• Set up and generate late fees.
• Set up dunning messages.
• Troubleshoot the statement process.

Course: v5.5 Statements - Setting Up Payer specific Dunning Messages – 30 min.
This course covers how to set up statement payer specific dunning messages in the NextGen application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
• List features of payer-specific dunning messages.
• Create dunning messages in the Statement Messages System Master File.
• Define aging categories and assign dunning messages in a Statement Library.
• Attach a Statement Library to a financial class in the Statement Parameters Mapping System Master File.
• Attach a Statement Library to a payer.

Curriculum: EPM Statements – Working with Statements v5.5
This curriculum focuses on familiarizing the learner with how to generate statements in a batch and on demand in the Enterprise Practice Management (EPM) application. It includes the following online courses:

• v5.5 Statements - Generating Statements in a Batch
• v5.5 Statements - Generating an Individual Statement on Demand

Course: v5.5 Statements - Generating Statements in a Batch – 45 min.
Covers the statement batch process in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
• Describe the options to use when generating statements in a batch.
• List four ways to suppress statements or encounter information.
• Describe the option to use when archiving statements.

Course: v5.5 Statements - Generating an Individual Statement on Demand – 15 min.
Covers how to print a statement on demand in the Enterprise Practice Management application.
Suggested prerequisites: None
Approximate length: 15 min
Course Objectives:
• Describe when to run a statement on demand from the account, chart, and encounter level.
• Describe the options to use when printing an individual statement on demand.
Curriculum: EPM Working with Autoflow v5.5
This curriculum focuses on familiarizing the learner with how to create and work with charges in the Enterprise Practice Management (EPM) application. It includes the following online courses:

- v5.5 Using the Autoflow Feature

Course: v5.5 Using the Autoflow Feature –30 min.
Covers using the Autoflow feature in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 30 min
Course Objectives:
- Check in a patient using the Autoflow feature.
- Check out a patient using the Autoflow feature.

Curriculum: Setting Up Master Lists – EHR v5.5
This curriculum focuses on setting up Master Lists using the File Maintenance application. It includes the following NextGen Learning Center online courses:

- v5.5 Master Lists

Course: v5.5 System Master Lists – 30 min.
Covers how the master lists are used and information needed for setup.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 30 min
Course Objectives:
- Define items in the Master Lists as they apply to the NextGen application.

Curriculum: Setting Up System Master Files – EHR v5.5
This curriculum focuses on setting up System Master Files using the File Maintenance application. This curriculum includes the following NextGen Learning Center online courses:

- v5.5 System Master Files - Allergies and Allergy Reactions
- v5.5 System Master Files - Counters
- v5.5 System Master Files - CPT4 Codes
- v5.5 System Master Files - DB Picklist Manager
- v5.5 System Master Files - Diagnosis Codes
- v5.5 System Master Files – Employers
- v5.5 System Master Files – Equipment Field Map
- v5.5 System Master Files - External Interface Map
- v5.5 System Master Files – Locations
- v5.5 System Master Files – Medication Codes
- v5.5 System Master Files – Modifiers and Modifier Categories
- v5.5 System Master Files – Pharmacies
• v5.5 System Master Files - Providers
• v5.5 System Master Files - Rx Units
• v5.5 System Master Files – Service Categories
• v5.5 System Master Files - SIG Codes
• v5.5 System Master Files - Specialties
• v5.5 System Master Files - User Image Description
• v5.5 System Master Files - User Note Descriptions
• v5.5 System Master Files – Vaccine Orders
• v5.5 System Master Files - View Categories
• v5.5 System Master Files - ZIP Codes

Course: v5.5 System Master Files – Allergies and Allergy Reactions – 20 min.
Covers how to set up the system level master file Allergies User Defined in the File Maintenance Application.  
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
• Define an Allergy as it applies to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up User Defined Allergies.
• Create and modify User Defined Allergies in the File Maintenance application.
• Define an Allergy Reaction as it applies to the NextGen EHR application.
• Identify and collect the information needed to set up Allergy Reactions.
• Create and modify Allergy Reactions in the File Maintenance application.

Course: v5.5 System Master Files – Counters– 15 min.
Covers how to set up the system level master file Counters in the File Maintenance Application.  
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 15 min.
Course Objectives:
• Define how Counters are used in the NextGen applications.
• Locate the Counters System Master File.
• Grant access to Counters in the File Maintenance application.
• Know how to set Counters for different elements of the NextGen applications.

Course: v5.5 System Master Files – CPT4 Codes – 45 min.
Covers how to set up the system level master file CPT4 Codes in the File Maintenance Application.  
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 45 min.
Course Objectives:
• Define a CPT4 Code as it applies to the NextGen applications.
• Identify and collect the information needed to set up CPT4 Codes.
• Create, modify, and hide CPT4 Codes in the File Maintenance application.

**Course: v5.5 System Master Files – DB Picklist Manager - 15 min.**
Covers how to set up the system level master file DB Picklist Manager in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
• Define the function of the specified System Master File.
• Identify and collect the information needed to set up specified System Master File.
• Create and modify the specified System Master File in the File Maintenance application.

**Course: v5.5 System Master Files – Diagnosis Codes – 60 min.**
Covers how to set up the system level master file ICD9CM Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
• Define an ICD9CM code as it applies to the NextGen Enterprise Practice Management (EPM) and Electronic Health Records (EHR) applications.
• Identify and collect the information needed to set up ICD9CM Codes.
• Create and modify ICD9CM Codes in the File Maintenance application.
• Define a Diagnosis Category, Diagnosis Severity, and Diagnosis Status as they apply to the NextGen EHR application.
• Identify and collect the information needed to set up Diagnosis Categories, Severities, and Statuses (for EHR users).
• Create and modify Diagnosis Categories, Severities, and Statuses in the File Maintenance application (for EHR users)

**Course: v5.5 System Master Files – Employers – 60 min.**
Covers how to set up the system level master file Employers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
• Define an Employer as it applies to the NextGen applications.
• Identify and collect the information needed to set up Employers.
• Create and modify Employers in the File Maintenance application.
Course: v5.5 System Master Files – Equipment Field Map – 15 min.
Covers how to set up the system level master file Integrated Equipment in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
- Define Equipment Field Map as it applies to the Next Electronic Health Records (EHR) application.
- View information in the Equipment Field Map System Master File.
- Map the Equipment Fields with the Template Fields.

Course: v5.5 System Master Files – External Interface Map – 15 min.
Covers how to set up the system level master file External Interface Map in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
- Define External Interface Map information as it applies to the NextGen Electronic Health Records (EHR) application.
- Identify and collect the information needed to set up External Interface Map files.
- Create and modify External Interface Map information in the File Maintenance application.

Course: v5.5 System Master Files – Locations – 60 min.
Covers how to set up the system level master file Locations in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 60 min.
Course Objectives:
- Define a Location as it applies to the NextGen applications.
- Identify and collect the information needed to set up Locations, whether as a service location or facility.
- Create and modify Locations in the File Maintenance application.

Course: v5.5 System Master Files – Medication Codes – 45 min.
Covers how to set up the system level master file Medications in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 45 min.
Course Objectives:
- Define a Medication as it applies to the NextGen Electronic Health Records (EHR) application.
- Identify and collect the information needed to set up Medications.
• Define the Medications By Payer, Payer Group, Problem, and Provider as they apply to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up Medications By Payer, Payer Group, Problem, and Provider.
• Create and modify Medications By Payer, Payer Group, Problem, and Provider in the File Maintenance application.

**Course: v5.5 System Master Files – Modifiers and Modifier Categories – 45 min.**

Covers how to set up the system level master file Modifier Categories in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 45 min.
Course Objectives:
• Define a Modifier as it applies to the NextGen application suite.
• Identify and collect the information needed to set up Modifiers.
• Create and modify Modifiers in the File Maintenance application.
• Define a Modifier Category as it applies to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up Modifier Categories.
• Create and modify Modifier Categories in the File Maintenance application.

**Course: v5.5 System Master Files – Pharmacies - 20 min.**

Covers how to set up the system level master file Pharmacies in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
• Define a pharmacy as it applies to the EHR application.
• Identify and collect the information needed to set up Pharmacies.
• Create and modify Pharmacies in the File Maintenance application.

**Course: v5.5 System Master Files – Providers – 90 min.**

Covers how to set up the Demographics, System, Notes and Provider Tabs of the system level master file Providers in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 90 min.
Course Objectives:
• Define a Provider as it applies to NextGen applications.
• State the licensing options for your providers.
• Understand the Providers Master File window.
• Identify and collect the information needed to set up Providers.
• Create and modify Providers in the File Maintenance application.
Course: v5.5 System Master Files – Rx Units – 15 min.
Covers how to set up the system level master file Rx Units in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
• Define an Rx Unit as it applies to the NextGen EHR application.
• Identify and collect the information needed to set up RX Units.
• Create and modify RX Units in the File Maintenance application.

Course: v5.5 System Master Files – Service Categories – 20 min.
Covers how to set up the system level master file Service Categories in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
• Define a Service Category as it applies to the NextGen EHR application.
• Identify and collect the information needed to set up Service Categories.
• Create and modify Service Categories in the File Maintenance application.

Course: v5.5 System Master Files – SIG Codes – 20 min.
Covers how to set up the system level master file SIG Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
• Define a SIG Code as it pertains to the NextGen EHR application.
• Identify and collect the information needed to set up SIG Codes.
• Create and modify the SIG Codes in the File Maintenance application.

Course: v5.5 System Master Files – Specialties – 15 min.
Covers how to set up the system level master file Specialties (provider) in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 15 min.
Course Objectives:
• Define Specialties as they pertain to the NextGen EPM application.
• Identify and collect the information needed to set up Specialties.
• Create and modify Specialties in the File Maintenance application.
• Attach a specialty to a rendering Provider in the Providers section in the File Maintenance application.
Course: v5.5 System Master Files – User Image Description – 15 min.
Covers how to set up the system level master file User Image Description in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
- Define User Image Description as it pertains to the NextGen EHR application.
- Identify and collect the information needed to set up User Image Description.
- Create and modify User Image Description in the File Maintenance application.

Course: v5.5 System Master Files – User Note Descriptions – 30 min.
Covers how to set up the system level master file User Note Descriptions in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EPM
Approximate Length: 30 min.
Course Objectives:
- Locate the User Note Descriptions System Master File.
- Define how User Note Descriptions are used in the applications.
- Grant users access to User Note Descriptions in the File Maintenance application.
- Create User Note Descriptions.

Course: v5.5 System Master Files – Vaccine Orders – 20 min.
Covers how to set up the system level master file Vaccinations in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
- Define Vaccine Orders as it pertains to the NextGen EHR application.
- Identify and collect the information needed to set up Vaccine Orders.
- Create and modify Vaccine Orders in the File Maintenance application.

Course: v5.5 System Master Files – View Categories – 20 min.
Covers how to set up the system level master file View Categories in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
- Define View Category as it pertains to the NextGen EHR application.
- Identify and collect the information needed to set up View Categories.
- Create and modify View Categories in the File Maintenance application.
**Course: v5.5 System Master Files – Zip Codes – 30 min.**
Covers how to set up the system level master file Zip Codes in the File Maintenance Application.
Suggested Prerequisites: Using File Maintenance
Applications Involved: EHR and EPM
Approximate Length: 30 min.
Course Objectives:
- Define a Zip Code as it applies to the NextGen applications.
- Identify and collect the information needed to set up specified Zip Codes.
- Create and modify the Zip Codes in the File Maintenance application.
- Create a zip code ‘on the fly’ from within another application.

**Curriculum: Setting Up Universal Preferences v5.5**
This curriculum focuses on the setup options in Universal Preferences. These settings apply to your entire NextGen enterprise. It includes the following NextGen Learning Center online course:

**Course: v5.5 Universal Preferences – 20 min.**
Covers setting up Universal Preferences and how the preferences are used.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 20 min
Objectives:
- Set up and maintain the Universal Preferences in the System Administrator application.
- Import preferences from the ngconfig.ini file.
- Modify Universal Preferences as needed.
- Understand where NextGen data are stored on your network.

**Curriculum: EHR Application Basics v5.5**
This curriculum focuses on familiarizing the student with the EHR application desktop menus and toolbars, along with shortcuts that can be used to access application functions. In addition, the different ways to configure the appearance of the EHR application desktop are covered. It includes the following NextGen Learning Center online courses:

- v5.5 EHR – Navigating the Application Desktop
- v5.5 EHR – Keyboard Shortcuts and Application Views
- v5.5 EHR - Securing Patient Privacy

**Course: v5.5 EHR - Navigating the Application Desktop – 15 min.**
Covers the components of the EHR application desktop and how to navigate through the EHR.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
- Define components of the desktop.
- Easily navigate the EHR desktop.
Course: **v5.5 EHR - Keyboard Shortcuts and Application Views – 15 min.**

Covers the different ways you can configure the EHR application to appear on the desktop, keyboard shortcuts, and common pop-up screens.

Suggested prerequisites: None

Applications Involved: EHR

Approximate length: 15 min.

Course Objectives:
- Demonstrate various ways in which to view the EHR application.
- Demonstrate keyboard shortcuts.
- Demonstrate right-click shortcuts.
- Identify common pop-up screens used throughout the EHR application.

Course: **v5.5 EHR - Securing Patient Privacy – 15 min.**

This course focuses on securing the EHR application desktop.

Suggested Prerequisites: None

Applications Involved:

Approximate Length: 15 min.

Course Objectives:
- Demonstrate the ways used to secure the NextGen EHR application.

Curriculum: **EHR Medical Record Modules v5.5**

This curriculum provides an overview of the NextGen EHR Medical Record Modules. Understanding these functions will help as you move further into setting up your system. It includes the following NextGen Learning Center online courses:

- v5.5 Medical Records Module - Allergies
- v5.5 Medical Records Module - Documents
- v5.5 Medical Records Module - Medications
- v5.5 Medical Records Module - Medications - Optional Module
- v5.5 Medical Records Module - Images
- v5.5 Medical Records Module - Problems
- v5.5 Medical Records Module - Procedures
- v5.5 Medical Records Module - Templates

Course: **v5.5 Medical Records Module - Allergies – 25 min.**

Provides an overview of the Allergies component of the Medical Records Module in the Electronic Health Records (EHR) application.

Suggested Prerequisites: Overview of the Medical Record Modules

Applications Involved: EHR

Approximate Length: 25 min

Course Objectives:
- View an existing allergy.
- Add, modify, resolve, and delete allergies.
• View allergy-drug interaction information.

Course: v5.5 Medical Records Module - Documents – 15 min.
Provides an overview of the Documents component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 15 min
Course Objectives:
• Generate a medical document based on an associated template.
• Save and print a medical document.

Course: v5.5 Medical Records Module - Medications – 30 min.
Provides an overview of the Medications component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Set up your preferred windows layout in the Medications module.
• Set up your preferred view for prescribed medications.
• Search a specific medication.
• Set up your favorite medications lists.
• Prescribe, update, delete, and renew medications.

Course: v5.5 Medical Records Module - Medications - Optional Module – 90 min.
Provides an overview of how to use the optional Medications module intended to replace the default Medications module. This module is not available unless it has been activated in File Maintenance.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 90 min
Course Objectives:
• Add, update, delete, and renew medications in the Medications module.
• Print or fax a prescription.
• Check interactions with other medications, allergies, and diagnoses that the patient may have.

Course: v5.5 Medical Records Module - Images – 90 min.
Provides an overview of the Images component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 90 min
Course Objectives:
• Define the components of the Images module associated with the NextGen EHR application.
• Navigate through the Images module in the NextGen EHR application.
• Create and use user-defined image sets and image toolbars.

Course: v5.5 Medical Records Module - Problems – 45 min.
Provides an overview of the Problems component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 45 min
Course Objectives:
• Use various search methods to search for a problem.
• Add, modify, resolve, and delete a problem.
• Make a resolved problem recur.

Course: v5.5 Medical Records Module - Procedures – 20 min.
Provides an overview of the Procedures component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 20 min
Course Objectives:
• Add, update, and delete procedures in the Procedures module of the Medical Records.
• Add diagnoses and modifiers to the procedures.

Course: v5.5 Medical Records Modules - Templates – 25 min.
Provides an overview of the Templates component of the Medical Records Module in the Electronic Health Records (EHR) application.
Suggested Prerequisites: Overview of the Medical Record Modules
Applications Involved: EHR
Approximate Length: 25 min
Course Objectives:
• Access a template.
• Define template components.
• Enter data and save a template.

Curriculum: EHR Overview of the Patient Demographics Module v5.5
This curriculum focuses on using the NextGen EHR application’s Patient Demographics module. It includes the following NextGen Learning Center online course:

• v5.5 EHR - Patient Demographics Module

Course: v5.5 EHR - Patient Demographics Module – 40 min.
Covers how to add a new patient or edit a patient's demographic and insurance information in the NextGen EHR application.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 40 min
Course Objectives:
• Access and view patient demographic and insurance coverage.
• Add a new patient or edit an existing patient's demographic information.
• Add new insurance for a patient or edit a patient's insurance coverage.

Curriculum: EHR Overview of the Patient Education Module v5.5
This curriculum focuses on understanding the functionality of the NextGen EHR application’s Patient Education module. It includes the following NextGen Learning Center online course:

• v5.5 EHR - Patient Education Module

Course: v5.5 EHR - Patient Education Module – 30 min.
Covers the Patient Education Module which is an optional module for the EHR. It presents educational topics as available through the Clinical Reference Systems Advisor Series.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Access the Patient Education Module.
• Select a Health Advisor.
• Search for educational topics.
• Print educational materials.

Curriculum: EHR Using the Workflow Module v5.5
This curriculum focuses on using the NextGen EHR application’s Workflow module and includes the following NextGen Learning Center online courses:

• v5.5 EHR Workflow Module - Appointments
• v5.5 EHR Workflow Module - Inbox
• v5.5 EHR Workflow Module - Tasks

Course: v5.5 EHR Workflow Module - Appointments – 15 min.
Covers viewing and updating patient appointments in Workflow.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 15 min
Course Objectives:
• Access the Workflow module.
• View appointments.
• Modify appointments.
• Set up appointment preferences.
• Access a patient's chart from the appointment window.

**Course: v5.5 EHR Workflow Module - Inbox – 15 min.**
Covers how to work with the e-mail Inbox in Workflow.
Suggested Prerequisites: Workflow Module - Appointments
Applications Involved: EHR
Approximate Length: 15 min
Course Objectives:
• Access the Workflow Module.
• View e-mail within the Inbox.
• Compose new e-mail.
• Respond to e-mail.
• Add e-mail to a patient's chart.
• Go to a patient's chart from an e-mail message.

**Course: v5.5 EHR Workflow Module - Tasks – 30 min.**
Covers how to work with the Tasks component of the Workflow module.
Suggested prerequisites: Workflow Module - Inbox
Applications involved: EHR
Approximate length: 30 min
Course Objectives:
• Create tasks on your own Task List.
• Send tasks to other NextGen EHR users.
• Respond to tasks sent to you by other users.
• Create preferences to color-code your tasks.
• Create tabs (or folders) or organize your tasks.
• Go to a patient's chart directly from a task.

**Curriculum: EHR Provider Approval Queue - Setup**
This curriculum focuses on using the NextGen EHR application’s Provider Approval Queue feature and includes the following NextGen Learning Center online course:

• v5.5 Provider Approval Queue Setup

**Course: v5.5 Provider Approval Queue Setup – 15 min.**
Covers setting up the NextGen EHR Provider Approval Queue (PAQ) feature for use. This feature enables providers to sign off on lab results, documents, and images and send workflow tasks to other users.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 15 min
Course Objectives:
• Enable the PAQ in System Administrator.
• Set up sign off items for the PAQ.
• Set up additional Display Options for Items List and Table of Contents.
• Associate a provider and relationship for PAQ users.
• Set up group rights for Display options.

## Curriculum: EHR Provider Approval Queue for End Users
This curriculum focuses on using the NextGen EHR application’s Provider Approval Queue feature and includes the following NextGen Learning Center online course:

• v5.5 Provider Approval Queue Setup

### Course: v5.5 Provider Approval Queue for End Users – 30 min.
Covers using the NextGen EHR Provider Approval Queue (PAQ) feature. This feature enables providers to sign off on lab results, documents, and images and send workflow tasks to other users.

Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Access the Provider Approval Queue (PAQ).
• Review, accept, and reject items in the PAQ.
• Add comments to items in the PAQ.
• Send a Workflow Task from the PAQ.

## Curriculum: EHR User Preferences v5.5
This curriculum focuses on setting up the user preferences for the Electronic Health Records (EHR) application and includes the following NextGen Learning Center online courses:

• v5.5 EHR User Preferences – General Tab
• v5.5 EHR User Preferences – Templates Tab
• v5.5 EHR User Preferences - Medical Records Tab
• v5.5 EHR User Preferences - Medication Tab
• v5.5 EHR User Preferences - Formulary Tab

### Course: v5.5 EHR User Preferences - General Tab – 10 min.
Covers the General Tab of User Preferences. These preferences include the ability to choose between desktop views and automatic logout intervals, along with options to use when performing patient searches.

Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 10 min.
Course Objectives:
• Define the options for Preferences from the General tab.
• Apply desired Preferences from the General tab.
Course: v5.5 EHR User Preferences - Templates Tab – 15 min.
Covers the Templates Tab of User Preferences. These preferences include the ability to create a
default template, along with a preferred list of templates to use.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
• Create a preferred list of medical record and demographic templates.
• Set an initial template to automatically display when a patient encounter is created.

Course: v5.5 EHR User Preferences - Medical Records Tab – 15 min.
Covers the Medical Records Tab of the User Preferences. These preferences include the ability
to set a default location and provider and customize the Main (History) toolbar.
Suggested prerequisites: None
Applications Involved: EHR
Approximate length: 15 min.
Course Objectives:
• Define the options for preferences from the Medical Records tab.
• Apply desired preferences from the Medical Records tab.

Course: v5.5 EHR User Preferences - Medication Tab – 30 min.
Covers the Medication Tab of the User Preferences. These preferences include options to
customize medication searches, customize printing and faxing requirements, and customize how
the medications list will appear in a patient’s medical record.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min.
Course Objectives:
• Define the options for preferences from the Medication tab.
• Apply desired preferences from the Medication tab.

Course: v5.5 EHR User Preferences - Formulary Tab – 10 min.
Covers the Formulary Tab of the User Preferences. The Formulary Tab is for the Formulary
Browser** used in the Medications Module. These preferences include the ability to choose to
use formularies in medication searches and the information that will display when the search list
is returned. **The Formulary Browser is an optional purchase.
Suggested prerequisites: None
Applications Involved: EHR
Approximate length: 10 min.
Course Objectives:
• Define the options for preferences from the Formulary tab.
• Apply desired preferences from the Formulary tab.
This curriculum focuses on how to work with encounters in the EHR application. It includes the following courses:

- v5.5 EHR Main Toolbar - History Toolbar
- v5.5 EHR Encounter Basics
- v5.5 EHR Encounters – Custom and Addendum
- v5.5 EHR Encounters - Customizing the View

**Course: v5.5 EHR Main Toolbar - History Toolbar – 20 min.**
Covers the Main Toolbar (History Toolbar), which provides users with access to encounters, the Medical Records, and Demographics modules.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
- Access and open the EHR Main Toolbar for a patient.
- Identify the components of the EHR Main Toolbar.

**Course: v5.5 EHR Encounter Basics – 20 min.**
Covers how to create, lock, unlock, and delete encounters and how to view encounter properties.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 20 min.
Course Objectives:
- Create a new encounter.
- Lock and unlock an encounter.
- Delete an encounter.
- View the encounter-level insurance.
- Change the view of the encounter table of contents.
- View the encounter properties.

**Course: v5.5 EHR Encounters – Custom and Addendum – 15 min.**
Covers how to add information to encounters that are locked by using custom encounters and by adding an addendum.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 15 min.
Course Objectives:
- Create a custom encounter in a patient's chart.
- Create an addendum to an existing patient encounter.
- Lock an encounter.

**Course: v5.5 EHR Encounters - Customizing the View – 10 min.**
Covers how to customize the Encounter View window in the Main toolbar.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 10 min.
Course Objectives:
• Select the custom components you want to see in a patient's encounter.
• Change the encounter view from encounter dates to categories.

Curriculum: EHR Encounter Workflows v5.5
This curriculum focuses on familiarizing the learner with the Knowledge Base Model (KBM) templates and typical Electronic Health Records (EHR) encounter workflow. It includes the following online courses:

• v5.5 EHR Encounter Workflow
• v5.5 EHR Encounter Workflow - Procedure
• v5.5 EHR Encounter Workflow - Telephone

Course: v5.5 EHR Encounter Workflow – 45 min.
Covers the KBM templates and the workflow of a typical EHR encounter.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
• Discuss the objectives of using the EHR.
• List the types of information easily accessible from the EHR.
• Describe the typical nursing EHR workflow.
• Describe the typical physician EHR workflow.

Course: v5.5 EHR Encounter Workflow - Procedure – 30 min.
Covers the KBM templates and the workflow of a typical EHR encounter for a procedure.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
• Discuss the objectives of using the EHR for capturing procedures.
• List the types of information easily accessible from the EHR.
• List the typical nursing EHR procedural encounter workflow.
• List the typical physician EHR procedural encounter workflow.

Course: v5.5 EHR Encounter Workflow - Telephone – 30 min.
Covers the KBM templates and the workflow of a typical EHR telephone call encounter.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
• Begin a telephone encounter using the NextGen EHR.
• Document a typical telephone encounter.
• Respond to a telephone encounter.
Curriculum: EHR Template Editor v5.5
This curriculum focuses on familiarizing the learner with how to create and work with templates in the EHR application. It includes the following courses:

- v5.5 Template Editor - Working with Templates
- v5.5 Template Editor – Menu Bars and Toolbars
- v5.5 Template Editor - Tools Menu
- v5.5 Template Editor – Adding Fields to a Template
- v5.5 Template Editor - Basic Triggers

Course: v5.5 Template Editor - Working with Templates – 45 min.
Covers the process of creating a template, creating a document and macros for that template, and then using the template and document in NextGen EHR application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
- Create a basic EHR template with basic triggers.
- Create a document and macros from the template that was created.
- Open and enter data into the template in the EHR application.
- See how the template data is then pulled into a NextGen document.

Course: v5.5 Template Editor – Menu Bars and Toolbars – 60 min.
Covers the functions and operations of the menu options and toolbar buttons in the Template Editor module.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Recall the function and operation of each of the menu options available in the Template Editor.
- Recall the function and operation of each of the toolbar buttons available in the Template Editor.
- Demonstrate the use of each of the Layout toolbar buttons.
- Interpret the information found on the status bar.
- Set up the User Preferences.

Course: v5.5 Template Editor – Tools Menu – 45 min.
Covers the Template Edit Log, setting up Template Sets and Template Editor User Preferences.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
- Use the Template Edit Log to view the status of a template, to delete a template from the Template Edit Log when needed.
- Update template links.
- Add, edit, disable, and enable a template.
- Assign a Template Set to a practice.
Course: v5.5 Template Editor – Adding Fields to a Template – 60 min.
Covers how to add fields to a template and set up the properties for the fields.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Choose appropriate buttons on the Fields toolbar to create fields on the template.
- Add fields to a template.
- Set up properties for the fields.

Course: v5.5 Template Editor – Basic Triggers – 60 min.
Covers the basic triggers available to use in the Template Editor.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
- Access the triggers window.
- Select an Event and Action for a trigger.
- Create the following basic triggers: Assign Field Value, Picklist, Pop-up - Number Pad and Calendar, Show/Hide, Goto Field, and Launch Template/Document.

Curriculum: EHR Template Import / Export Utility v5.5
This curriculum focuses on the Template Import / Export Utility and includes the following online course:

Course: v5.5 Template Import Export Utility – 15 min.
Covers how to import and/or export templates between different NextGen databases.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
- Access the Template Import Export Utility
- Export a template from a NextGen database.
- Import a Template into a NextGen database.
- Set Options for the Template Import/Export Utility.

Curriculum: EHR Document Builder v5.5
This curriculum focuses on familiarizing the learner with the Document Builder feature of the EHR application. It includes the following courses:

- v5.5 EHR Document Builder – Basics
- v5.5 EHR Document Builder – Working with the Document Builder
- v5.5 EHR Document Builder – Basic Macros
- v5.5 EHR Document Builder – Import Export Utility
Course: v5.5 EHR Document Builder – Basics – 45 min.
Covers the basic functionality of the EHR Document Builder.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
- Open an existing document or create a new document.
- Define the components of the Document Builder.
- Format a document to meet your practice needs.

Covers the basics of creating documents in the EHR Document Builder.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
- Insert an image, a Macro, and a Begin/End section into a document.
- Define a Macro.
- Compile a document.

Course: v5.5 EHR Document Builder – Basic Macros – 40 min.
Covers how to create macros in the EHR Document Builder.
Suggested Prerequisites: None
Approximate Length: 40 min
Course Objectives:
- Define Macro Types.
- Define the components of the Macro Editor.
- Create Standard, File Maintenance and Summary Macros.
- Change the date formats for Hardcoded date Macros.

Covers the Document Import/Export functionality that allows documents to be shared between databases.
Suggested prerequisites: None
Approximate length: 15 min.
Course Objectives:
- Identify the requirements for using the Document Import/Export Utility.
- Export a document.
- Import a document.
- Identify possible errors/conflicts and ways to resolve them.

Curriculum: KBM Templates v5.5
This curriculum covers how to use the KBM Immunization Templates in the Electronic Health Records (EHR) application. It includes the following online courses:
- v5.5 KBM Templates - Assessments 7.7
- v5.5 KBM Templates - Document Libraries 7.7
Course: v5.5 KBM Templates – Assessments 7.7 – 60 min.
Covers how to document assessments in the Electronic Health Records (EHR) application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Assign a diagnosis to "today's concern/reason for visit".
• Use patient's previous assessments and or chronic problems to assign a diagnosis.
• Move previous documented assessments from Unresolved to Resolved within EHR.
• Add (document) new chronic problems.
• Understand how documenting an assessment within the Assessment template affects other templates.

Course: v5.5 KBM Templates – Document Library 7.7 – 30 min.
Covers how to generate documents from templates in the Electronic Health Records (EHR) application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
• Create written patient communiques.
• Edit / personalize generic templates.
• Print and save the documents in the EHR.

Course: v5.5 KBM Templates – Family History 7.7 - 30 min.
Covers how to add a new patient or edit a patient's family medical history in the Electronic Health Records (EHR) application.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Identify active fields and pop-up windows for documenting your patient's family medical history.

Course: v5.5 KBM Templates – Health Maintenance 7.7 - 30 min.
Covers how to interpret, update, and edit the Health Maintenance template.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Recognize when a patient's scheduled medical tests and exams are due.
• Order a scheduled tests/exam.
• Document a completed test/exam.
• Document a patient's refusal to a test/exam.
• Indicate elevated risk levels for certain conditions.
• Recognize how ordering tests/exams on the Health Maintenance template affects other templates.

Course: v5.5 KBM Templates – HPI 7.7 - 30 min.
Covers how to use the HPI template to document a patient's presenting illness.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Recognize the functions of the fields within the template.
• Document a patient's symptoms regarding their Chief Complaint.
• Describe how documenting a patient's symptoms in the Complaint Pop-Up window, affects EM coding.
• Describe how documenting a patient's symptoms in the Complaint Pop-Up window, creates a written report of the patient's condition.

Course: v5.5 KBM Templates – Immunizations 7.7 – 60 min.
Covers how to order and document immunizations for adults in the Electronic Health Records (EHR) application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Create an immunization history of your patient.
• Review the immunization history of your patient.
• Order an immunization.
• Document that an immunization order has been completed.
• Send a charge to the Superbill.

Course: v5.5 KBM Templates – Past Medical History 7.7 - 30 min.
Covers how to add a new patient or edit a patient's history of surgical and diagnostic procedures in the Electronic Health Records (EHR) application.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Select the appropriate radio button for adding various levels of detail regarding a patient's procedural and diagnostic history onto the Patient Chart.
• Identify active fields and pop-up windows for documenting medical / surgical procedures.
• Identify active fields and pop-up windows for documenting diagnostic procedures.

Course: v5.5 KBM Templates – Physical Exam 7.7 - 30 min.
Covers how to document a physical examination of a patient in the Electronic Health Records (EHR) application.
Suggested prerequisites: None
Approximate length: 30 min
Course Objectives:
• Document a patient's physical exam review by entering data into the fields provided.
• Identify active fields and pop-up windows for documenting your patient's physical exam
• Identify the functions of the Physical Exam sub-templates
• Generate a narrative document listing your physical exam findings

Course: v5.5 KBM Templates – Problem List 7.7 - 30 min.
Covers how to use the Problem List template to document a patient's chronic illness.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Recognize the functions of the fields within the template.
• Document a patient's key variables regarding their chronic illnesses.
• Recognize how documenting a chronic condition within the template affects other templates.

Course: v5.5 KBM Templates – Procedures 7.7 - 30 min.
Covers how to use the Procedures template to order patient procedures.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Order common procedures/tests.
• Complete pop-up windows designed to provide detailed instructions and billing information for each procedure/test.

Course: v5.5 KBM Templates – Review of Systems 7.7 - 30 min.
Covers how to properly document a patient's review of systems.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
• Document a patient's review of systems by entering data into the fields provided.
• Identify active fields and pop-up windows for documenting your patient's review of systems.
• Identify the functions of the Review of Systems sub-templates.
Generate a narrative document summarizing your review of systems findings.

Course: v5.5 KBM Templates – Social History 7.7 - 30 min.
Covers how to add a new patient or edit a patient's social history in the Electronic Health Records (EHR) application.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min
Course Objectives:
- Complete a patient's social history by entering data into the fields provided.
- Identify active fields and pop-up windows for documenting your patient's social history.
- Select the appropriate radio button for adding various levels of detail regarding a patient's social history onto the Patient Chart.
- Identify the functions of the six different sections within the Social History template.

Curriculum: KBM Workflows v5.5
This curriculum focuses on familiarizing the learner with the Knowledge Base Model (KBM) templates and typical encounter workflows. It includes the following online courses:

- v5.5 KBM Workflow - Behavioral Health Intake 7.7
- v5.5 KBM Workflow - Behavioral Health Initial Psych Evaluation 7.7
- v5.5 KBM Workflow - Cardiology 7.7
- v5.5 KBM Workflow - Correctional Health Management 7.7
- v5.5 KBM Workflow - Dermatology 7.7
- v5.5 KBM Workflow - ENT 7.7
- v5.5 KBM Workflow - Gastroenterology 7.7
- v5.5 KBM Workflow - General Surgery 7.7
- v5.5 KBM Workflow - Gynecology 7.7
- v5.5 KBM Workflow - Internal Medicine/Family Practice 7.7
- v5.5 KBM Workflow - Neurology 7.7
- v5.5 KBM Workflow - Neurosurgery 7.7
- v5.5 KBM Workflow - Obstetrics 7.7
- v5.5 KBM Workflow - Oncology 7.7
- v5.5 KBM Workflow - Ophthalmology 7.7
- v5.5 KBM Workflow - Ophthalmology ASC 7.7
- v5.5 KBM Workflow - Ophthalmology Retina 7.7
- v5.5 KBM Workflow - Orthopedics 7.7
- v5.5 KBM Workflow - Pediatrics 7.7
- v5.5 KBM Workflow - Physical Therapy 7.7
- v5.5 KBM Workflow - Pulmonary 7.7
- v5.5 KBM Workflow - Rheumatology 7.7
- v5.5 KBM Workflow - Urology 7.7
Course: v5.5 KBM Workflow – Behavioral Health Intake 7.7 – 90 min.
Covers the KBM workflow of a typical behavioral health intake encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Record the patient's History of Presenting Illness (HPI).
• Report significant patient history data.
• Log extensive Social History information.
• Complete a detailed Mental Status Exam.
• Document your Assessment using Axes I through V categories.
• Formulate a customized Treatment Plan for your patient, including education and instructions, a Psychotherapy referral, and follow-up.

Course: v5.5 KBM Workflow – Behavioral Health Initial Psych Evaluation 7.7 – 90 min.
Covers the KBM workflow of a typical behavioral health initial evaluation encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Record the patient's History of Presenting Illness (HPI).
• Report significant patient history data.
• Prescribe medication orders.
• Fax medication orders to a pharmacy, physician, or other location.
• Document your Assessment using Axes I through V categories.
• Formulate a customized Treatment Plan for your patient, including education and instructions, lab orders, and follow-up.

Course: v5.5 KBM Workflow - Cardiology 7.7 – 90 min.
Covers the KBM workflow of a typical cardiology encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow - Correctional Health Management 7.7 – 80 min.
Covers the KBM workflow of a typical correctional health initial encounter.
Suggested prerequisites: None
Approximate length: 80 min.
Course Objectives:
Document a complete Intake visit using the data grids and navigation links on the Chm Home and Chm Intake templates.

Generate the Chart Note for the encounter.

Lock the encounter to prevent changes from being made.

**Course: v5.5 KBM Workflow – Dermatology 7.7 – 90 min.**

Covers the KBM workflow of a typical dermatology encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:

- Enter the patient's medication and allergy information via the respective modules.
- Document history, vital signs, review of systems and physical exam information for a patient.
- Create a treatment plan for the patient.
- Enter procedure and diagnosis codes for the encounter.
- Submit an office visit code from the E&M Coding component.
- Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

**Course: v5.5 KBM Workflow – ENT 7.7 – 90 min.**

Covers the KBM workflow of a typical ENT encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:

- Enter the patient's medication and allergy information via the respective modules.
- Document history, vital signs, review of systems and physical exam information for a patient.
- Create a treatment plan for the patient.
- Enter procedure and diagnosis codes for the encounter.
- Submit an office visit code from the E&M Coding component.
- Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

**Course: v5.5 KBM Workflow – Gastroenterology 7.7 – 90 min.**

Covers the KBM workflow of a typical gastroenterology encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:

- Enter the patient's medication and allergy information via the respective modules.
- Document history, vital signs, review of systems and physical exam information for a patient.
- Create a treatment plan for the patient.
- Enter procedure and diagnosis codes for the encounter.
- Submit an office visit code from the E&M Coding component.
- Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.
Course: v5.5 KBM Workflow – General Surgery 7.7 – 90 min.
Covers the KBM workflow of a typical surgical office encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Sign on to the EHR application and select a provider, location, and patient.
• Navigate to the Home template and identify its components.
• Record chronic problems via the Problem List Add popup.
• Enter the patient's medication and allergy information.
• Document the patient's history, HPI, vital signs, review of systems, and physical exam information.
• Create an individualized treatment plan for the patient.
• Submit an office visit code from the E&M Coding template.
• Generate a comprehensive Chart Note encompassing all the data from the encounter.

Course: v5.5 KBM Workflow – Gynecology 7.7 – 90 min.
Covers the KBM workflow of a typical gynecologic encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow – Internal Medicine / Family Practice 7.7 – 90 min.
Covers the KBM workflow of a typical internal medicine or family practice encounter.
Suggested prerequisites: None
Approximate length: 120 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow – Neurology 7.7 – 90 min.
Covers the KBM workflow of a typical neurology encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Sign on to the EHR application and select a provider, location, and patient.
• Navigate to the Home template and identify its components.
• Record chronic problems via the Problem List Add popup.
• Enter the patient's medication and allergy information.
• Document the patient's history, HPI, vital signs, review of systems, and physical exam information.
• Create an individualized treatment plan for the patient.
• Submit an office visit code from the E&M Coding template.
• Generate a comprehensive Chart Note encompassing all the data from the encounter.

Course: v5.5 KBM Workflow – Neurosurgery 7.7 – 90 min.
Covers the KBM workflow of a typical neurosurgery encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Sign on to the EHR application and select a provider, location, and patient.
• Navigate to the Home template and identify its components.
• Record chronic problems via the Problem List Add popup.
• Enter the patient's medication and allergy information.
• Document the patient's history, HPI, vital signs, review of systems, and physical exam information.
• Create an individualized treatment plan for the patient.
• Submit an office visit code from the E&M Coding template.
• Generate a comprehensive Chart Note encompassing all the data from the encounter.

Course: v5.5 KBM Workflow – Obstetrics 7.7 – 90 min.
Covers the KBM workflow of a typical obstetric encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow – Oncology 7.7 – 90 min.
Covers the KBM workflow of a typical oncology encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

**Course: v5.5 KBM Workflow - Ophthalmology 7.7 –95 min.**

Covers the KBM templates and the workflow of a typical ophthalmology encounter.
Suggested prerequisites: None
Approximate length: 95 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

**Course: v5.5 KBM Workflow - Ophthalmology ASC 7.7 –60 min.**

Covers the KBM templates and the workflow of a pre-op and cataract surgery encounter.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Document a complete initial preop visit.
• Schedule an ASC Surgical procedure.
• Document a complete surgical visit for cataract surgery.
• Submit E&M Coding for both encounters.
• Generate a variety of documents, including the Chart Note, Referral Letters, and Pre- and Post-Op reports for the encounter.

**Course: v5.5 KBM Workflow - Ophthalmology Retina 7.7 –90 min.**

Covers the KBM templates and the workflow of a typical retina encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.
Course: v5.5 KBM Workflow – Orthopedics 7.7 – 90 min.
Covers the KBM workflow of a typical orthopedic encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow – Pediatrics 7.7 – 90 min.
Covers the KBM workflow of a typical pediatric encounter.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

Course: v5.5 KBM Workflow – Physical Therapy 7.7 – 60 min.
Covers the KBM workflow of a typical physical therapy encounter.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Sign on to the EHR application and select a provider, location and patient.
• Navigate to the PT Home, template and understand the components of this template and the navigation toolbar.
• Enter the patient's reason for visit, chronic conditions, medication and allergy information via the respective modules.
• Create Physical Therapy Orders.
• Complete the Initial Physical Therapy Evaluation template.
• Use the PT Note template to record daily progress, exercise information and assess the patient's progress.
• Submit Procedure Codes from the PT Treatment Log template.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.
Course: v5.5 KBM Workflow – Pulmonary 7.7 – 90 min.

Covers the KBM workflow of a typical pulmonary encounter.
Suggested prerequisites: None
Approximate length: 90 min.

Course Objectives:
• Record the patient's History of Presenting Illness (HPI).
• Report significant patient history data.
• Prescribe medication orders.
• Fax medication orders to a pharmacy, physician, or other location.
• Document your Assessment.
• Formulate a customized Treatment Plan for your patient, including lab orders, diagnostics, and follow-up.

Course: v5.5 KBM Workflow – Rheumatology 7.7 – 90 min.

Covers the KBM workflow of a typical rheumatology encounter.
Suggested prerequisites: None
Approximate length: 90 min.

Course Objectives:
• Record the patient's History of Presenting Illness (HPI).
• Report significant patient history data.
• Prescribe medication orders.
• Fax medication orders to a pharmacy, physician, or other location.
• Document your Assessment.
• Formulate a customized Treatment Plan for your patient, including lab orders, diagnostics, and follow-up.

Course: v5.5 KBM Workflow – Urology 7.7 – 90 min.

Covers the KBM workflow of a typical urology encounter.
Suggested prerequisites: None
Approximate length: 90 min.

Course Objectives:
• Sign on to the EHR application and select a provider, location, and patient.
• Navigate to the Master, or Home, template and understand the components of this template and the navigation toolbar.
• Enter the patient's medication and allergy information via the respective modules.
• Document history, vital signs, review of systems and physical exam information for a patient.
• Create a treatment plan for the patient.
• Enter procedure and diagnosis codes for the encounter.
• Submit an office visit code from the E&M Coding component.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.
Curriculum: CHC Setup for Billing and Reporting v5.5

This curriculum focuses on setting up the various components involved in setting up the Community Health Center (CHC) and Federally Qualified Health Center (FQHC) functionality. It includes the following NextGen Learning Center online courses:

- v5.5 CHC Overview of Community Health Center Setup
- v5.5 CHC Government Payer Setup
- v5.5 CHC Encounter Rate Billing Setup
- v5.5 CHC Encounter Tracking Setup
- v5.5 CHC Sliding Fee and Flat-Rate Sliding Fee Setup

Course: v5.5 CHC Overview of Community Health Center Setup - 15 min

Provides an overview of what is involved in setting up the Community Health Center (CHC) and Federally Qualified Health Center (FQHC) functionality offered in the NextGen application.

Suggested Prerequisites: None

Applications Involved: EPM

Approximate Length: 15 min

Course Objectives:

- State the options available for setting up CHC-related Sliding Fees.
- State the options available for setting up CHC-related Government Payers.
- State the options available for setting up CHC-related Encounter Tracking.
- State the options available for setting up CHC-related Encounter Rate Billing.

Course: v5.5 CHC Government Payer Setup - 30 min.

Covers how to set up your NextGen application to properly handle the specific needs of FQHCs and CHCs government payers such as Medicare and Medicaid.

Suggested Prerequisites: This course makes the assumption that you are already familiar with the basics of creating service items and payers.

Application Involved: EPM

Approximate Length: 30 min

Course Objectives:

- Set up your Practice to enable Qualified Encounter Billing.
- Set up your Service Items to roll up to a single unit charge for an encounter in order to meet the requirements of government payer qualified encounters.
- Set up your applicable Medicare Payers for CHC billing and to carve out Medicare B charges to a HCFA 1500.

Course: v5.5 CHC Encounter Rate Billing Setup – 45 min.

Covers how to set up your NextGen application's encounter rate billing functionality for FQHCs and CHCs.

Suggested Prerequisites: This course makes the assumption that you are already familiar with the basics of how to use the File Maintenance and System Administrator applications.

Applications Involved: EPM

Approximate Length: 45 min

Course Objectives:
• Enable NextGen's encounter rate billing functionality in Enterprise Preferences and grant security access to the Encounter Rate Billing Library in System Administrator.
• Create a Contract that adjusts all CPT4 codes off to a zero dollar charge.
• Create an encounter rate CPT4 Code and a Service Item to match that code.
• Build your encounter rate(s) into an Encounter Rate Library.
• Attach the Contract and Encounter Rate Library to the relevant Payer(s).

Course: v5.5 CHC Encounter Tracking Setup - 45 min.
Covers how to set up your NextGen application to properly handle the specific encounter report data collection needs of FQHCs and CHCs.
Suggested Prerequisites: This course makes the assumption that you are already familiar with the basics of qualified encounter reporting and the UDS report.
Applications Involved: EPM
Approximate Length: 45 min
Course Objectives:
• Set up your Enterprise Preferences to display the (UDS) encounter reporting fields in the EPM application Patient Charts.
• Create additional custom chart fields in Enterprise Preferences for other demographic information tracking needs.
• Set the appropriate Service Items as qualified encounters.
• Designate family size and income in Patient Accounts.

Course: v5.5 CHC Sliding Fee and Flat Rate Sliding Fee Setup - 90 min.
Covers how to set up your NextGen application to properly handle the specific needs of CHCs as well as FQHCs Sliding Fee Schedules and Flat-Rate Sliding Fees.
Suggested Prerequisites: This course makes the assumption that you are already familiar with the basics of creating and using financial classes, transaction codes, payers, service items and fee schedules using contracts.
Applications Involved: EPM
Approximate Length: 90 min
Course Objectives:
• Set up Sliding Fee Schedules for when you need variable charge adjustments rate based on family size and income.
• Emulate flat-rate sliding fees by setting up Contracts and Payers where a single rate (i.e. $15 per visit) is charged regardless of the services performed.

Curriculum: Working with Bad Debt Encounters v5.5
This curriculum focuses on how to work with encounters in a Bad Debt status in the Enterprise Practice Management application. It includes the following NextGen Learning Center online courses:

• v5.5 Bad Debt - Working with Bad Debt
Course: v5.5 Bad Debt - Working with Bad Debt - 30 min.
Covers how to transition encounters to Bad Debt during the collection process and post transactions to an encounter in a Bad Debt status.
Suggested Prerequisites: None
Approximate Length: 30 min
Course Objectives:
• Generate the Bad Debt report.
• Run Collection Letters.
• Run the Bad Debt Process.
• Work with Bad Debt.
• Settle Bad Debt.

Curriculum: EPM Employer and Company Accounts v5.5
This curriculum covers setting up and billing employer and company accounts. It includes the following NextGen Learning Center online courses:
• v5.4 Billing Employer and Company Accounts

Course: v5.4 Billing Employer and Company Accounts – 90 min.
Covers how to create encounters where the employer is the guarantor as well as to create and bill employer invoices for non-encounter charges.
Suggested prerequisites: None
Approximate length: 90 min
Course Objectives:
• Look up an employer's account information.
• Access an employer's Account Profile.
• Create an encounter for which the employer will serve as guarantor.
• Create an invoice where charges are not associated with specific patient encounters. Review charges and notes associated with the employer's account.
• Bill an employer invoice.

Curriculum: EPM Worklog v5.5
This curriculum covers how to create and work with tasks and the EPM Worklog manager. It includes the following on line courses:
• v5.5 Worklog Administration
• v5.5 Using Worklog Manager

Course: v5.5 Worklog Administration – 60 min.
Covers where to set up the various components of the NextGen Worklog.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
• Define Worklog Manager as it applies to the NextGen Enterprise Practice Management (EPM) application
• Know which files, libraries, rights, and preferences are used by the Worklog Manager
• Set up the major components that are used by task types and the Worklog Manager

Course: v5.5 Using Worklog Manager– 45 min.
Covers how to work in the EPM Worklog.
Suggested prerequisites: None
Approximate length: 45 min
Course Objectives:
• Define Worklog Manager and tasks as they apply to the NextGen Enterprise Practice Management (EPM) application
• Locate tasks that have been assigned to you
• Create, modify, and complete tasks assigned to you

Curriculum: EPM Reports v5.5
This curriculum covers running, interpreting, and using reports in the Enterprise Practice Management (EPM) application. It includes the following NextGen Learning Center online courses:
• v5.5 Reports - Working with EPM Reports
• v5.5 Reports – Working with AR Reports
• v5.5 Reports – Working with Daily Reports
• v5.5 Reports – Working with Monthly Reports
• v5.5 Reports – Troubleshooting Your EPM Reports

Course: v5.5 Reports - Working with EPM Reports - 60 min.
Covers the working with report formats and understanding the reporting details in the EPM application.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
• Match each type of EPM report with its description.
• Set up security for EPM report users.
• Match each icon on the report toolbar with its function.
• Match each date used in the report process with its function and use.
• Match each tab on the Report Filter window with its use.
• Customize a report.

Course: v5.5 Reports – Working with AR Reports – 60 min.
Covers how to work with report formats and understanding AR report details.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
• Match each type of AR report with its description and use.
• List the data source and financial class for each AR report.
• Describe how to work with the Report Filter window for each AR report.
• Describe how to balance AR reports with other reports.

Course: v5.5 Reports – Working with Daily Reports – 30 min.
Covers how to use daily reports to account for charges and transactions.
Suggested prerequisites: None
Approximate length: 30 min
Course Objectives:
• Match each type of Daily report with its description and use.
• List the data source and financial class for each Daily report.
• Describe how to work with the Report Filter window for each Daily report.
• Describe how to balance Daily reports with other reports.

Course: v5.5 Reports – Working with Monthly Reports – 60 min.
Covers how to use the monthly reports to account for charges and transactions along with balancing to an accounts receivable balance.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
• Match each type of Monthly report with its description and use.
• List the data source and financial class for each Monthly report.
• Describe how to work with the Report Filter window for each Monthly report.
• Describe how to balance Monthly reports with other reports.

Course: v5.5 Reports – Troubleshooting Your EPM Reports – 15 min.
Covers how to reduce reporting errors and understanding how the information is generated.
Suggested prerequisites: None
Approximate length: 15 min
Course Objectives:
• Match each System Data Integrity and Validation report with its use
• Use the auto-correct feature to correct errors found by the System Data Integrity and Validation reports.
• Balance multiple reports.
• List ways to check the consistency of the data being reported
• List ways to check the accuracy of the report data.

Curriculum: RTS Real time Transaction Server v5.5
This curriculum covers how to use the Real time transaction server for referral and eligibility processing.
• v5.5 RTS - Realtime Transaction Server Setup
• v5.5 RTS - Real time Transaction Server End User
Course: **v5.5 RTS - Realtime Transaction Server Setup – 60 min.**
Covers how to set up the Real-time Transaction Server (RTS) functionality.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
- Enable the use of RTS through Practice Preferences.
- Setup an Eligibility Profile.
- Setup a Claim Status Profile
- Add a Payer to the Eligibility/Referral System
- Set up a Provider for Eligibility and Referrals
- Allow users proper security access to the Eligibility/Referral system.

Course: **v5.5 RTS - Realtime Transaction Server End User – 90 min.**
Covers how to use the Real-time Transaction Server (RTS) for referral and eligibility processing.
Suggested prerequisites: None
Approximate length: 90 min
Course Objectives:
- Access the NextGen Real-time Transaction Server functionality.
- Verify a patient's insurance coverage.
- Generate referral requests.
- View a patient's referral history.
- Lookup past eligibility and referral inquiries.
- View the RTS report.

Curriculum: **EPM Background Business Processor v5.5**
This curriculum covers how to create and work with tasks and the EPM Worklog manager. It includes the following on line courses:

- v5.4 Background Business Processor Setup
- v5.4 BBP Packages and Jobs
- v5.4 BBP Copying Packages, Jobs, and Schedules

Course: **v5.4 Background Business Processor Setup – 45 min.**
Covers how to setup the Background Business Processor.
Suggested prerequisites: None
Approximate length: 45 min
Course Objectives:
- Understand the requirements for installation of the Background Business Processor.
- Understand how to setup the BBP Security Rights.
- Understand how to setup the BBP preferences.
- Understand the installation of the Engine Service.
Course: v5.4 Background Business Processor – Packages and Jobs – 30 min.
Covers how to set up packages and jobs in the BBP.
Suggested prerequisites: None
Approximate length: 30 min
Course Objectives:
• Create a BBP package.
• Assign the BBP server that will run the package.
• Create the job(s) that will run in that package.
• Schedule a package to run at a pre-defined time

Course: v5.4 Background Business Processor – Copying Packages, Jobs and Schedules – 60 min.
Covers copying packages, jobs and schedules in the BBP.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
• Copy a package and its jobs to create a new package and jobs.
• Copy a job within a package.
• Copy a schedule and modify it for the package.

Curriculum: EHR User Defined SIG Codes v5.5
This curriculum focuses on using the NextGen EHR application’s User Defined SIG Code functionality. It includes the following NextGen Learning Center online course:

• v5.5 EHR – Building User-Defined SIG Codes

Course: v5.5 EHR – Building User Defined SIG Codes – 45 min.
Covers how to set up SIG Code components and build user defined Sig Codes.
Suggested Prerequisites: EHR Medical Records Module – Medications
Applications Involved: EHR
Approximate Length: 45 min
Course Objectives:
• Use an available SIG Code for a prescribed medication
• Set up SIG Code components
• Build a user defined SIG Code

Curriculum: EHR Labs v5.5
This curriculum focuses setting up and using the Labs Module in the EHR. It includes the following NextGen Learning Center online courses:

• v5.5 Labs - System Master Files
• v5.5 Labs - Labs Module
• v5.5 Labs - Lab Assign Module
• v5.5 Lab Master Template – Adding New Lab Tests and Triggers
**Course: v5.5 Labs - System Master Files – 90 min.**

Covers how to set up the Labs System Master Files to store data needed by the Lab Master template, Labs module, and Lab Assign module.

**Suggested Prerequisites:** None

**Applications Involved:** EHR

**Approximate Length:** 90 min

**Course Objectives:**
- Access the Labs System Master Files.
- Add and modify lab tests in the Lab Tests System Master File.
- Add and modify lab components in the Lab Components System Master File.
- Assign lab components to a specific lab test in the Lab Test Groups System Master File.
- Set up users to be notified with the test results in the Lab Result Notifications System Master File.
- Change the test results display order in the Lab Results Sequences System Master File.

**Course: v5.5 Labs - Labs Module – 60 min.**

Covers how to access the Labs Module to manually order lab tests, view lab test results, and sign off the results.

**Suggested Prerequisites:** None

**Applications Involved:** EHR

**Approximate Length:** 60 min

**Course Objectives:**
- Access the Labs Module
- View lab results in the Labs Flowsheet
- Order a lab test manually in the Labs Module
- View, update, or delete a lab order in the Lab Orders window
- View and compare lab results in the Lab Orders window
- Signoff a lab test result in the Labs Module

**Course: v5.5 Labs - Lab Assign Module – 60 min.**

Covers how to access the Lab Assign Module to manually enter lab results and match lab results with orders automatically or manually.

**Suggested Prerequisites:** None

**Applications Involved:** EHR

**Approximate Length:** 60 min

**Course Objectives:**
- Access the Lab Assign module.
- Describe the rules used to match the lab results to orders.
- Set up Lab Assign options.
- View and find a lab order.
- Enter lab results manually.
- Match lab results with orders automatically or manually.
- Commit lab panels.
Course: v5.5 Lab Master Template – Adding New Lab Tests and Triggers – 90 min.
Covers how to set up the Lab Master template and use the template to order lab tests in EHR.
Suggested Prerequisites:
Applications Involved: EHR
Approximate Length: 90 min
Course Objectives:
• Access the Lab Master template in the Template Editor
• Add a lab test in the Lab Master template
• Setup triggers to submit lab orders in the Lab Master template
• Access the Lab Master template in the EHR application
• Order lab tests using the Lab Master template

Curriculum: EHR Working with Family Units v5.5
This curriculum focuses on using the NextGen EHR application’s Family Unit functionality. It includes the following NextGen Learning Center online course:

• v5.5 EHR – Setting up Family Unit and Alias

Course: v5.5 EHR Setting Up Family Unit and Alias – 45 min.
Covers how to set up family units and give patient alias names when applicable. Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 45 min
Course Objectives:
• Set up a new family unit
• Create an alias for a patient
• Perform a member search
• View a member history

Curriculum: Note File Monitor Utility v5.5
This curriculum focuses on setting up and using the Note File Monitor Utility. This feature is provides various methods to use audio within template fields and provides the ability to edit, correct and format data. It includes the following courses:

• v5.5 Note File Monitor Utility

Course: v5.5 Note File Monitor Utility – 60 min.
Covers the how to set up and use the Note File Monitor Utility
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Set up the Universal Preferences in System Administrator that are necessary to use the Note File Monitor Utility.
• Set up a Note Field on a template.
• Open the Note File Monitor Utility.
• Use Note Fields in an EHR template.
• Review data in Note Fields after the file is processed by the Note File Monitor Utility.

**Curriculum: RTF File Monitor Utility v5.5**
This curriculum focuses on setting up and using the RTF File Monitor Utility. It includes the following courses:

- v5.5 RTF File Monitor Utility
- v5.3 Creating RTF File Headers

**Course: v5.5 RTF File Monitor Utility – 60 min.**
Covers the how to set up and use the RTF File Monitor Utility
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Access the RTF File Monitor Utility
- Recall the functionality of each of the RTF File Monitor components
- Set up and use the RTF File Monitor Utility

**Course: v5.3 Creating RTF File Headers – 45 min.**
Covers how to create RTF File Headers.
Suggested prerequisites: RTF File Monitor Utility
Approximate length: 45 min.
Course Objectives:
- Recall the rules used to create RTF File Headers
- Create appropriate RTF File Headers
- Troubleshoot common errors found in the Log File.

**Curriculum: EHR NextGen Audit Utility v5.5**
This curriculum focuses on setting up and using the Audit Utility in the EHR application. This feature is used to track activity related to user tables in the database. It includes the following course:

- v5.5 NextGen Audit Utility

**Course: v5.5 NextGen Audit Utility – 30 min.**
Covers the how to set up and use the NextGen Audit Utility.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
- Access the NextGen Audit Utility
- Audit a table and stop an audit
- View an audit
- Archive an audit
- Restore an archive
Curriculum: Fax Manager Utility v5.5
This curriculum focuses on setting up and using the Fax Manager Utility. It includes the following courses:

- v5.5 Fax Integration Services - Setup
- v5.5 NextGen CoverPage Editor Utility

Course: v5.5 Fax Integration Services - Setup – 90 min.
Covers the how to set up and use the Fax Manager Utility.
Suggested prerequisites: None
Approximate length: 90 min.
Course Objectives:
- Set up the ODBC connection for the Fax Integration Services
- Configure the Fax Integration Services
- Set up Server Properties, Working Folders, and Inbound fax
- Use the NextGen default cover pages to create your own cover page.
- Fax a prescription, document, and image in NextGen EHR

Course: v5.5 NextGen CoverPage Editor Utility – 20 min.
Covers how to use the CoverPage Editor Utility to create a cover page to use with the Fax Manager Utility.
Suggested prerequisites: Fax Manager Utility
Approximate length: 20 min.
Course Objectives:
- Access the CoverPage Editor Utility
- Create a new cover page
- Set up a default cover page.

Curriculum: EHR Reports v5.5
This curriculum focuses on setting up and generating reports in the EHR application using the EHR Reporting tool. It includes the following courses:

- v5.4 EHR Reports - Working with EHR Reports

Course: v5.4 EHR Reports – Working with EHR Reports 60 min.
Covers the how to set up and generate reports in the EHR application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Generate specific patient reports, using the EHR Report tool, sorting patient information by diagnosis, procedure, allergy, and or medication.
- Create Report Types, using the NextGen File Maintenance application that will allow you to save reports in pre-determined categories.
- Set up specific sorting criteria, using the Report filter, to pull patient and numeric data.

**Curriculum: NextGen ICS v5.5**

This curriculum covers the NextGen ICS application. It includes the following NextGen Learning Center online courses:

- v5.5 ICS - Setup
- v5.5 ICS - Application Training
- v5.5 ICS - Setup for Attaching an EOB Scan to an Encounter
- v5.5 ICS - Attaching an EOB Scan to an Encounter

**Course: v5.5 ICS - Set Up – 90 min.**

Covers the set up of the NextGen ICS application.

Suggested prerequisites: None

Approximate length: 90 min

Course Objectives:

- Connect to the ICS Scanner.
- Assign operation rights for ICS users.
- Set up security controls within ICS.
- Set up the ICS Network Storage Location.
- Set up Categories, Document Types and Fields.

**Course: v5.5 ICS - Application Training – 90 min.**

Covers how to use the NextGen ICS application.

Suggested prerequisites: None

Approximate length: 90 min

Course Objectives:

- Scan documents and images.
- Save documents and images as a batch.
- Index documents and images.
- Search for documents and images.
- Work with the ICS Viewer.
- Annotate documents and images.
- Create To Do Tasks from ICS.
- Access ICS from the NextGen EHR and EPM applications.

**Course: v5.5 ICS - Setup for Attaching an EOB Scan to an Encounter – 60 min.**

Covers how set up the NextGen ICS application to attach EOB scans.

Suggested prerequisites: None

Approximate length: 60 min

Course Objectives:

- Set up an EOB Document Type.
- Create an EOB Quick File Hot Key.
- Assign an EOB Quick File Configuration.
- Allow the appropriate users access to the EOB Document Type.
Course: v5.5 ICS - Attaching an EOB Scan to an Encounter – 60 min.
Covers how to use the NextGen ICS application to attach EOB scans.
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
- Scan and File an EOB Image using NextGen ICS.
- Link an EOB Image to a Posting Batch in the NextGen EPM.
- View an EOB Image from a Patient's Chart.

Curriculum: Optik v5.5
This curriculum covers Optik set up and use and includes the following online courses:

- v5.5 Optik Overview
- v5.5 Optik Set Up
- v5.5 Optik Advanced Features

Course: v5.5 Optik Overview – 60 min.
Covers the user interface and how to manage a customer transaction using Optik
Suggested prerequisites: None
Approximate length: 60 min
Course Objectives:
- Recognize the icons, buttons, and drop down menus within the Optik interface.
- Process a customer transaction for eyeglasses, contacts, and or accessories.
- Print customer receipts and order summaries.

Course: v5.5 Optik Set Up – 60 min.
Covers how to properly set up the Optik application.
Suggested prerequisites: v5.4 Optik – Overview
Approximate length: 60 min
Course Objectives:
- Using the System Administrator application, specify Optik's report path, designate its users, and set up user's rights and permissions.
- Using the File Maintenance application, set up Optik's Master Files.
- Ensure that the SIM code for each item listed on the SIM Mapping tab of the Lens Maintenance master files exists in your SIM Library.
- Create all necessary SIM exceptions.
- Configure Optik's display options.
- Set up a barcode printer.
- Upload frame data from the Frames CD.

Course: v5.5 Optik Advanced Features – 45 min.
Covers how to properly set up and operate more advanced tools.
Suggested prerequisites: v5.4 Optik Overview, v5.4 Optik Set Up
Approximate length: 30 min
Course Objectives:
- Create an inventory database
- Manage in-stock inventory
- Create purchase orders for inventory items
- Reconcile purchase orders

Curriculum: ePrescribing v5.5
This curriculum covers Optik set up and use and includes the following online courses:

- v5.5 ePrescribing – ExpressRx Setup
- v5.5 ePrescribing – ExpressRx End Users
- v5.5 ePrescribing with NextGen

Course: v5.5 ePrescribing – ExpressRx Setup – 30 min.
This course covers how to set up ExpressRx to send prescriptions and receive refill requests electronically.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 30 min.
Course Objectives:
- Define ePrescribing, SureScripts, and the relationship between the two.
- Setup ePrescribing within NextGen’s EHR.

Course: v5.5 ePrescribing – ExpressRx End User – 60 min.
This course covers how to use ExpressRx to prescribe medicines and refill prescriptions electronically using SureScripts.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 60 min.
Course Objectives:
- Define ePrescribing, SureScripts, and the relationship between the two.
- Send new prescriptions.
- Respond to refill requests.
- Review, match, and respond to unmatched refill requests.
- Understand the time limit for refill request, and the importance of response time compliance mandated by SureScripts.

Course: v5.5 ePrescribing with NextGen – 45 min.
This course covers how to install and use the ePrescribing Services provided by NextGen and SureScripts.
Suggested Prerequisites: None
Applications Involved: EHR
Approximate Length: 45 min.
Course Objectives:
- Define ePrescribing, SureScripts, and the relationship between the two.
- Setup ePrescribing within NextGen's EMR, which includes, within File Maintenance:
Download pharmacies
- Enroll providers
- Setup tasks/categories

- Send new prescriptions.
- Respond to refill requests.
- Review, match, and respond to unmatched refill requests.
- Understand the time limit for refill request, and the importance of response time compliance mandated by SureScripts.

**Individual Courses**

**Course: v5.5 Claims – Assigning CLIA Numbers – 30 min.**
Covers how to properly set up to bill encounters with Clinical Laboratory Improvements Amendments (CLIA) numbers on a CMS 1500 claim form.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 30 min
Course Objectives:
- State the options for attaching CLIA numbers in NextGen and their hierarchy of use.
- Attach a CLIA number to a service location.
- Attach a CLIA location to a service item.
- Attach a CLIA number to a provider.
- Enable CLIA number usage through the claim print library.

**Course: v5.5 Claims – Assigning Mammography Numbers – 30 min.**
Covers how to properly set up to bill encounters with mammography numbers on a CMS 1500 claim form.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 30 min
Course Objectives:
- Complete the steps required to set up NextGen for mammography billing.
- Set up additional mammography printing parameters where appropriate.

**Course: v5.5 Claims – Dental Billing – 45 min.**
Covers the basics of how to setup and use NextGen's ADA/A37D dental billing functionality.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 45 min
Course Objectives:
- Enable practice-specific dental billing options.
- Set up relevant service items to bill using an ADA (American Dental Association) Dental Claim Form.
- Set up dental libraries for Claim Edits, Claim Printing, and Submitter Profiles.
- Designate payers for dental billing and apply State License Numbers to dental providers.
- Utilize dental billing with the NextGen EPM application.
Course: v5.5 Claims – DME Billing – 30 min.
Covers how to properly set up to bill Durable Medical Equipment (DME) claims using the CMS 1500 claim form.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 30 min
Course Objectives:
- Understand how DME claims work.
- Set up your DME Regional Carriers.
- Determine and assign your DME Provider Number and/or NPI (National Provider ID) at the appropriate level for your practice.
- Designate Service Items for DME billing based on the payer selected.

Course: v5.5 Claims – Provider Based Billing – 45 min.
Covers how to properly set up NextGen’s provider-based billing which allows practices to split-bill professional and technical components.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 45 min
Course Objectives:
- Create separate Service Item Members (SIMs) representing the Professional and Technical components of a charge.
- Group the Professional and Technical component SIMs using SIM Groups (by location and/or payer).
- Configure a payer for split billing.
- Delay billing for a payer, as needed.

Course: v5.5 Claims - Supervisor Billing – 30 min.
Covers how to properly set up to bill encounters using a supervisor ID number.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 30 min
Course Objectives:
- Create encounters to bill your mid-level provider claims with the information required by the payer or clearinghouse.
- Set up your NextGen application to ensure that those claims pull from the proper information.
- Properly create "Incident To" encounters.

Course: v5.5 Claims – UB Billing – 45 min.
Covers how to properly set up and use NextGen’s UB institutional billing functionality.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 45 min
Course Objectives:
- Assign practice-specific default UB claim settings.
- Set up a service item to bill using a UB claim for a specified payer.
- Assign payer-specific UB claim information.
- Assign location and provider-specific payer UB claim information.
• Assign general encounter-specific UB claim settings.
• Assign encounter-specific UB Condition, Occurrence, and Value Codes.

**Course: v5.5 Claims – Workers Compensation Billing – 20 min.**
Covers how to set up NextGen to properly bill for Workers' Compensation claims.
Suggested prerequisites: v5.5 Billing Encounters
Approximate length: 20 min
Course Objectives:
• Set up workers' compensation encounters for proper billing.
• Set up your workers compensation payers, when appropriate.

**Course: v5.5 EHR Offline Document Processor – 45 min.**
Covers how to use the Offline Document Processor to generate a document from a remote workstation.
Suggested prerequisites: None
Approximate length: 45 min.
Course Objectives:
• Access the Offline Document Processor.
• Recall components of the Offline Document Processor.
• Set up the Offline Document Processor.
• Work with the Offline Document Processor.
• Generate offline documents in EHR.

**Course: v5.5 ERA - Processing Electronic Remittance Advices – 60 min.**
Covers how to process ERA files using the NextGen EPM application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Import your ERA files into the NextGen EPM application.
• Understand the ERA Import Posting Report.
• Use Batch Posting to reconcile and post your ERA results.
• View Transaction-based EOB data upon import.

**Course: v5.5 ERA - Setting Up Electronic Remittance Advices – 60 min.**
Covers how to set up the NextGen EPM application to process ERA.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
• Set up your ERA-related Reason Codes.
• Set up your ERA-related Transaction Codes.
• Set up Payers for ERA acceptance.
• Set up your Remittance Profile(s).
• Decide upon a network location for ERA files.
Course: v5.5 Graphing in NextGen EHR – 60 min.
Covers how to create a graphical representation of patient medical information in the NextGen EHR application.
Suggested prerequisites: None
Approximate length: 60 min.
Course Objectives:
- Access the Graphing module.
- Generate and modify a Template graph.
- Generate a Growth Chart graph and set up the viewing options for the Growth Chart graph.
- Generate a Lab Results graph.

Course: v5.5 Overview of Credits in the EPM Application – 15 min.
Covers the basic concepts of how credits are used in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 15 min.
Course Objectives:
- Identify the different types of credits found in the EPM application.

Course: v5.5 Region Editor – 30 min.
Covers how to use the Region Editor to create an Active Image to be used in the Template Editor application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
- Access the Region Editor.
- Recall the functionality of each component of the Region Editor.
- Use the Region Editor to create an Active Image.
- Insert an Active Image into the Template Editor.

Course: v5.5 Scanning in EHR Without ICS – 30 min.
Covers how to scan documents directly into a patient's chart using the Imaging Module in NextGen EHR.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:
- Open the Imaging Module in NextGen EHR.
- Connect to a scanner.
- Scan a Document.
- Add annotations to the Document.
- Save the Document to a patient's chart.

Course: v5.5 Setting Up EPM and EHR to Work Together – 60 min.
Covers how to set the options to ensure that the Enterprise Practice Management (EPM) application and Electronic Health Record (EHR) application will work together to share data.
Course Objectives:

• List the options to set up in order to determine how the EPM and EHR applications work together to share patient data.
• Match each option with its function and the application in which it can be accessed.

**Course: v5.5 The NextGen Billing and Collection Process – 30 min.**
Covers the billing and collections process in the Enterprise Practice Management (EPM) application.
Suggested prerequisites: None
Approximate length: 30 min.
Course Objectives:

• Discuss the billing process.
• Discuss components of the billing and collections process.

**Course: v5.5 Using the SIM Global Update – 20 min.**
Covers how to update all Service Items (SIMs) at one time using the SIM Global Update feature.
Suggested prerequisites: None
Approximate length: 20 min.
Course Objectives:

• Describe the components of the SIM Global Update feature.
• Use SIM Global Update to modify the Service Items (SIMs) in the Service Item Library.