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# Table of Contents

Overview .......................................................................................... 4

Education Plans .................................................................................... 5

Dashboard ........................................................................................... 8

Electronic Dental Record (EDR) ................................................................. 9

Electronic Health Records (EHR) ............................................................. 11

Electronic Practice Management (EPM) ...................................................... 34

Image Control System (ICS) .................................................................... 73

Knowledge Base Model (KBM) - 7.9 ......................................................... 76

Knowledge Base Model (KBM) - 8.0 & Foundation Template Set .................. 84

Meaningful Use ...................................................................................... 89

NextPen ............................................................................................... 90

Optik ......................................................................................................... 91

Index ........................................................................................................ 92
Overview

This guide is designed to provide a brief description of the eLearning courses offered by the NextGen Learning Center. eLearning provides a self-directed, web-based learning environment that allows users to take courses at their own pace.

The purpose of the eLearning courses is to introduce users to the NextGen applications. They are designed to provide a basic level of understanding on how to set up and use the Electronic Health Records (EHR), Enterprise Practice Management (EPM), and Electronic Dental Record (EDR) applications, and are intended as precursors to instructor-led training.

Presentation

eLearning content is presented online in courses that are often grouped into curricula and education plans.

• A course is a unit of instruction on a particular topic. Most courses focus on one main topic, and will take approximately 15-45 minutes to complete. Once you have finished a course, you can refer back to it at any time.

• A curriculum is a grouping of one or more courses related to a larger, more general subject area.

• An education plan is a grouping of several courses and/or curricula that apply to a particular role or job function, such as System Configuration Training or Provider.

Searching This Guide

To search for a specific course or topic, press Ctrl+f on your keyboard to bring up a search box. Type a keyword or part of the course name, and then press Enter. If Adobe Acrobat is able to locate the search criteria, it will highlight it on your screen. To scroll through all of the instances of the criteria, press Enter on your keyboard.

At the beginning of this document you will find a Table of Contents that will direct you courses pertaining to specific NextGen applications. At the end of this document you will find a searchable Index by topic. Click the page icon next to the course topic to jump to the page of the catalog where that course is located. There you will find a brief description and other details about the course.

Continuing Medical Education

NextGen Healthcare is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education (CME) for physicians.

NextGen Healthcare designates each CME activity for credit in category 1 of the AMA’s Physician’s Recognition Award system. Activities are designated for AMA PRA Category 1 Credit™, and the physician should claim only those hours of credit that he/she actually spent in the educational activity.

If a course qualifies for CME credit, it will be designated as follows in this guide, “Continuing Education: CME”.

Contacting eLearning

The eLearning support website is available 24-hours a day to assist you with your eLearning needs. Click the Learning Center Help link on the LMS Toolbar, or the Help link on the NextGen bar, at the top of your eLearning account for access to ‘how-to’ documents, frequently asked questions, enrollment materials, downloads, and more.

If you are unable to find the answer to your question on the support site, please open an incident with NextGen Client Support.
**Education Plans**

**EPM/EHR Education Plans**

**System Configuration Training (SCT) >> 50 Hours**

The SCT education plan will teach you to setup the EPM and EHR applications. It is suitable for clients who have purchased both the EPM and EHR applications, and anyone who will be doing the setup of the applications and working with them from beginning to end. This education plan is required for anyone attending the SCT classroom training session.

**EPM Core Group Training (CGT) >> 26 Hours**

The EPM CGT education plan will teach you to use the EPM application’s features once they have been set up. This education plan is suitable for any user of the system, and is required for anyone attending the CGT classroom training session.

**EHR Core Group Training (CGT) >> 20 Hours + Specialty KBM**

The EHR CGT education plan will teach you to use the EHR application’s features once they have been set up. This education plan is suitable for any user of the system, and can be paired with a Specialty KBM offering. This education plan is required for anyone attending the CGT classroom training session.

**Specialty KBM >> Time Varies**

The Specialty KBM courses will teach you to work with the specialty KBM templates and workflows. These courses include specialty-specific offerings that are suitable for any EHR user working with the KBM specialty templates and workflows. The estimated time to complete varies based on the workflow(s) and template(s) selected.

**EPM-Only Education Plans**

**Overview of NextGen Practice Management System Configuration Training – EPM SCT (EPM SCT Overview) >> 8 Hours**

The purpose of the online System Configuration Training courses is to introduce users to the NextGen Enterprise Practice Management (EPM) application. The courses provide a basic understanding of how to set up the Enterprise Practice Management (EPM) application and cover areas such as system security, file maintenance and appointment scheduling administration. The courses are intended as precursors to instructor-led training.

**EPM System Configuration Training (EPM SCT) >> 38 Hours**

The EPM SCT education plan will teach you to setup the EPM application. It is suitable for clients who have only purchased the EPM application, and anyone who will be doing the setup of the application and working with it from beginning to end. This education plan is required for anyone attending the EPM SCT classroom training session. If you purchased EHR in addition to EPM, please refer to the System Configuration Training (SCT) education plan.

**Small Practice Initial Training - EPM >> 8 Hours**

The Small Practice Initial Training for EPM is designed to introduce small practice users to the EPM application, and is intended as a starting point for all small practice users.

**EPM System Configuration Training (EPM SCT) for Small Practices >> 17 Hours**

The EPM SCT for Small Practices education plan will teach small practice users to setup the EPM application. It is suitable for anyone who will be doing the setup of the EPM application and working with it from beginning to end. This education plan is required for anyone attending the EPM SCT training session.
EPM Core Group Training (CGT) for Small Practices >> 14 Hours

The EPM CGT for Small Practices education plan will teach small practice users to use the EPM application’s features once they have been set up. This education plan is suitable for any user of the system, and is required for anyone attending the EPM CGT training session.

Biller >> 20 Hours

The Biller education plan will teach you specific tasks related to billing. It contains some SCT and some CGT courses, and is suitable for all employees who perform billing tasks.

EPM End User >> 25 Hours

The EPM End User education plan will teach you a broad range of specific application tasks for the EPM application. It contains some SCT and some CGT courses, and is suitable for employees who require a general knowledge of the EPM application.

Front Desk >> 16 Hours

The Front Desk education plan will teach you basic and advanced appointment scheduling, as well as how to work with charge and payment entry. It contains some SCT and some CGT courses, and is suitable for employees who perform scheduling and check-in/check-out tasks.

Scheduler >> 9 Hours

The Scheduler education plan will teach you basic and advanced tasks related to appointment scheduling. It contains some SCT and some CGT courses, and is suitable for all employees who perform scheduling tasks.

Enterprise Appointment Scheduling (EAS) >> 21 Hours

The EAS education plan will teach you to set up and work with EAS. It is available only to clients who have purchased EAS.

EHR-Only Education Plans

EHR Definition Workshop (DWS) >> 20 Hours

The DWS education plan will teach you the setup for EHR file maintenance and table building. It is suitable for clients who have only purchased the EHR application, and anyone who will be doing the setup of the application and working with it from beginning to end. This education plan is required for anyone attending the DWS classroom training session. If you purchased EPM in addition to EHR, please refer to the SCT education plan.

Small Practice Initial Training - EHR >> 6.5 Hours

The Small Practice Initial Training for EHR is designed to introduce small practice users to the EHR application, and is intended as a starting point for all small practice users.

EHR for Small Practices >> 17 Hours

This combined EHR DWS and CGT education plan will teach the small practice user to set up and work with the EHR application. It is suitable for anyone who will be doing the setup of the application and working with it from beginning to end. This education plan is required for anyone attending the DWS and CGT training session.
EHR End User >> 14 Hours

The EHR End User education plan will teach you a broad range of specific application tasks for the EHR application. It contains some SCT and some CGT courses, and is suitable for employees who require a general knowledge of the EHR application.

Provider >> 6.5 Hours + Specialty KBM

The Provider education plan will teach you the basics of the EHR application, including how to work with encounters. It is suitable for physicians and nurses, and should be paired with the Specialty KBM offering for their specialty.

EDR Education Plans

Software Administrators >> 4 Hours

This education plan for the EDR Administrator builds understanding of the entire program and describes the setup tools available only to the Administrators.

Super Users >> 3.5 Hours

The Super Users education plan touches all aspects of the software to give an over-arching perspective and understanding of the tool.

Office Management >> 2 Hours

The Office Management education plan explores the tools used behind the scenes within the practice, including reporting and scheduling.

Clinical Staff >> 2 Hours

This clinical-focused education plan offers the opportunity to explore the patient and chart tools, including searching, notes and both traditional and periodontal tooth charting.
Dashboard

Dashboard 3.0 - EHR
Time: 30 minutes  
Continuing Education: N/A  
Product: Dashboard  
Application Version: 3.0  
Prerequisites: None  
Appears In: No Education Plans

This course will teach you about EHR and HQM related dashboards.

Dashboard 3.0 - EPM
Time: 45 minutes  
Continuing Education: N/A  
Product: Dashboard  
Application Version: 3.0  
Prerequisites: None  
Appears In: No Education Plans

This course covers dashboards that display information related to the EPM application.

Dashboard 3.0 - Overview
Time: 40 minutes  
Continuing Education: N/A  
Product: Dashboard  
Application Version: 3.0  
Prerequisites: None  
Appears In: No Education Plans

This course covers the basics of the Dashboard application.

Dashboard 3.0 - Setup
Time: 15 minutes  
Continuing Education: N/A  
Product: Dashboard  
Application Version: 3.0  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up the Dashboard application.
Electronic Dental Record (EDR)

EDR - Front Desk Administration
Time: 30 minutes  
Product: EDR as packaged with EPM  
Prerequisites: EDR - Working with Patients  
Appears In: EDR Office Management, EDR Super Users
This course will teach you the basics of working within the NextGen EPM to establish dental appointments and encounters.

EDR - Getting Started
Time: 15 minutes  
Product: EDR as packaged with EPM  
Prerequisites: None  
Appears In: EDR Clinical Staff, EDR Office Management, EDR Super Users, EDR Software Administrators
This course will teach you to login to and log out of EDR and introduce you to the concept of Electronic Dental records while providing a quick tour.

EDR - Periodontal Charting
Time: 35 minutes  
Product: EDR as packaged with EPM  
Prerequisites: EDR - Tooth Charting  
Appears In: EDR Clinical Staff, EDR Super Users, EDR Software Administrators
This course will teach you the ins and outs of creating a periodontal chart using two different periodontal tools: the periodontal chart and the PSR tool.

EDR - Reports and Documents
Time: 15 minutes  
Product: EDR as packaged with EPM  
Prerequisites: EDR - Working with Patients  
Appears In: EDR Office Management, EDR Software Administrators
This course will teach you to run the most common reports in EDR and to attach documents to a patient's file.

EDR - Setup and Administration
Time: 20 minutes  
Product: EDR as packaged with EPM  
Prerequisites: EDR - Working with Patients  
Appears In: EDR Software Administrators
The course will teach you to establish and modify user accounts and define the tools available to your practice.
**EDR - Tooth Charting**

**Time:** 25 minutes  
**Product:** EDR as packaged with EPM  
**Application Version:** 4.1-4.3  
**Continuing Education:** N/A  
**Prerequisites:** EDR - Working with Patients  
**Appears In:** EDR Clinical Staff, EDR Super Users, EDR Software Administrators  

This course will teach you the ins and outs of creating a tooth chart using the Charting module. You will see and practice charting existing, planned and completed treatments.

**EDR - Working with Patients**

**Time:** 25-35 minutes  
**Product:** EDR as packaged with EPM  
**Application Version:** 4.1-4.3  
**Continuing Education:** N/A  
**Prerequisites:** EDR Getting Started  
**Appears In:** EDR Clinical Staff, EDR Office Management, EDR Super Users, EDR Software Administrators  

This course will teach you the basics of searching and working within patient files. You may also participate in an optional section that explores the basics of the approval tools.
Electronic Health Records (EHR)

v5.6 An Overview of the EHR Application

**Time:** 30 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, EHR CGT, EHR End User, DWS (EHR Only), Provider

This course provides a brief overview of the Electronic Health Records (EHR) application.

v5.6 Application Launcher

**Time:** 15 minutes  
**Product:** EHR, EPM  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** All Education Plans

This course is designed to help you to navigate through the Application Launcher that is used to access the NextGen applications.

v5.6 Case Management - EHR

**Time:** 30 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

In this 30-minute course, you will learn about setting up and working with the Case Management function in the EHR application.

v5.6 CoverPage Editor Utility

**Time:** 20 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to use the CoverPage Editor Utility to create a cover page to be used by the NextGen Fax Manager Utility.

v5.6 Creating Locations

**Time:** 30 minutes  
**Product:** EHR, EPM  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course is intended to instruct the student how to set up Locations in NextGen File Maintenance.
v5.6 Determining and Assigning Organizational Levels

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** EHR, EPM  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers the issues you need to explore to determine the NextGen hierarchical setup for your organization.

v5.6 Document Monitor

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to attach a document file in Rich Text Format (RTF) to an Encounter/Category in the NextGen Electronic Health Records (EHR) application.

v5.6 EHR - Building User Defined SIG Codes

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** No Education Plans

Covers how to set up SIG Code components and build user defined SIG Codes.

v5.6 EHR - Keyboard Shortcuts and Application Views

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** SCT, EHR CGT, EHR End User, DWS (EHR Only), Provider

This course is intended to familiarize the student with the different ways to view the Electronic Health Record (EHR) application, as well as some time-saving keyboard shortcuts and common pop-up windows.

v5.6 EHR - Navigating the Application Desktop

**Time:** 25 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** SCT, EHR CGT, EHR End User, DWS (EHR Only), Provider

This course is intended to familiarize the user with navigating the components of the Electronic Health Records (EHR) application desktop.
v5.6 EHR - Patient Demographics Module

Time: 20 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to access, create, and modify patient demographic and insurance information using the NextGen Demographic Module in the Electronic Health Records (EHR) application.

v5.6 EHR - Patient Education Module

Time: 20 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers the Patient Education Module in the EHR. This module is an optional purchase.

v5.6 EHR - Securing Patient Privacy

Time: 15 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EHR CGT, EHR End User, DWS (EHR Only), Provider

This course is intended to instruct the student in methods to help prevent unauthorized access to patient charts.

v5.6 EHR - Setting Up Family Unit and Alias

Time: 20 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up and work with the Family Unit and Alias functions in the NextGen Electronic Health Record (EHR) application.

v5.6 EHR Document Builder - Basic Macros

Time: 20 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: EHR CGT

This course is intended to introduce the student to the basic macros used in the EHR Document Builder.

v5.6 EHR Document Builder - Basics

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.6  
Prerequisites: None  
Appears In: EHR CGT

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This course is intended to introduce the student to the basic functionality of the EHR Document Builder.

**v5.6 EHR Document Builder - Import Export Utility**

- **Time:** 15 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EHR CGT

This course is intended to introduce the student to the functionality of the EHR Document Import/Export Utility.

**v5.6 EHR Document Builder - Working with the Document Builder**

- **Time:** 30 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EHR CGT

This course is intended to instruct the student how to construct a document in the EHR Document Builder.

**v5.6 EHR Encounter Workflow**

- **Time:** 45 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** EHR CGT, EHR End User, Provider

This purpose of this course is to familiarize the student with the EHR Encounter Workflow.

**v5.6 EHR Encounter Workflow - Procedure**

- **Time:** 30 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** EHR CGT, EHR End User, Provider

This course is designed to familiarize you with the basic functions for a procedural encounter in the NextGen EHR (Electronic Health Records) application.

**v5.6 EHR Encounter Workflow - Telephone**

- **Time:** 30 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** EHR CGT, EHR End User, Provider

This course is designed familiarize the student with the basic functionality regarding capturing telephone encounters in the NextGen EHR (Electronic Health Records) application.
v5.6 EHR Encounters - Basics

Time: 20 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT, EHR End User, Provider

This course is intended to instruct the student how to create, delete, lock, and unlock encounters in the Electronic Health Records (EHR) application, as well as how to view the encounter properties.

v5.6 EHR Encounters - Custom and Addendum

Time: 15 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT, EHR End User, Provider

This course covers how to use custom encounters and addenda to add information to locked encounters.

v5.6 EHR Encounters - Customizing the View

Time: 10 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT, EHR End User, Provider

This course is intended to instruct the user how to customize the display options of the main toolbar in the Electronic Health Records (EHR) application.

v5.6 EHR Main Toolbar - History Toolbar

Time: 20 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the user with the components of the History Toolbar (also known as the Main Toolbar) in the Electronic Health Records (EHR) Application.

v5.6 EHR Orders Module - Ordering Tests

Time: 45 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Orders AOE Questions and Answers, v5.6 System Master Files - Orders Tests and Components, v5.6 System Master Files - Order NextGen Test Compendium and Favorite, v5.6 EHR - Orders Module - Setting Up
Appears In: No Education Plans

This course will teach you how to order lab or radiology tests in the Orders module.
**v5.6 EHR Orders Module - Setup**

*Time:* 20 minutes  
*Continuing Education:* N/A  
*Product:* EHR  
*Application Version:* 5.6-5.6 SP1  
*Prerequisites:* None  
*Appears In:* No Education Plans

This course is designed to instruct the student how to set up the security rights for the Orders module in the System Administrator application and the System Master Files that you need to set up in the File Maintenance application.

**v5.6 EHR Orders Module - Working with Test Results**

*Time:* 60 minutes  
*Continuing Education:* N/A  
*Product:* EHR  
*Application Version:* 5.6-5.6 SP1  
*Prerequisites:* 5.6 System Master Files - Orders AOE Questions and Answers, 5.6 System Master Files - Orders Tests and Components, 5.6 System Master Files - Order NextGen Test Compendium and Favorite, 5.6 EHR - Orders Module - Setting Up, 5.6 EHR - Orders Module - Ordering Tests  
*Appears In:* No Education Plans

This course will teach you how to review test results, enter test results manually, attach documents or images to a test, and sign off the test results in the Orders module and Provider Approval Queue (PAQ) module.

**v5.6 EHR Reports - Working with EHR Reports**

*Time:* 20 minutes  
*Continuing Education:* N/A  
*Product:* EHR  
*Application Version:* 5.6-5.6 SP1  
*Prerequisites:* None  
*Appears In:* No Education Plans

This course covers how to set up and generate reports in the EHR application.

**v5.6 EHR Setting Up Family Unit and Alias**

*Time:* 45 minutes  
*Continuing Education:* N/A  
*Product:* EHR  
*Application Version:* 5.6  
*Prerequisites:* None  
*Appears In:* No Education Plans

This course covers how to set up and work with the Family Unit and Alias functions in the NextGen Electronic Health Record (EHR) application.

**v5.6 EHR User Preferences - Documents**

*Time:* 10 minutes  
*Continuing Education:* N/A  
*Product:* EHR  
*Application Version:* 5.6  
*Prerequisites:* None  
*Appears In:* EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Documents tab of the EHR user preferences.
v5.6 EHR User Preferences - Formulary

Time: 10 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Formulary tab of the EHR user preferences.

v5.6 EHR User Preferences - General

Time: 10 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the General tab of the EHR user preferences.

v5.6 EHR User Preferences - Main Toolbar

Time: 10 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Main Toolbar tab of the EHR user preferences.

v5.6 EHR User Preferences - Medical Records

Time: 15 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Medical Records tab of the EHR user preferences.

v5.6 EHR User Preferences - Medications

Time: 30 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Medications tab of the EHR user preferences.
v5.6 EHR User Preferences - Templates

Time: 15 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course is intended to familiarize the student with the options available on the Templates tab of the EHR user preferences.

v5.6 EHR Workflow Module - Appointments

Time: 15 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers viewing and updating patient appointments in Workflow.

v5.6 EHR Workflow Module - Inbox

Time: 30 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to work with the e-mail Inbox in Workflow.

v5.6 EHR Workflow Module - Tasks

Time: 30 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to work with the Tasks component of the Workflow Module.

v5.6 Enterprise Preferences

Time: 45 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only)

This course covers how to set up your enterprise level NextGen preferences.

v5.6 ePrescribing - Setting Up eRx

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up NextGen to use SureScripts electronic prescription services.

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v5.6 ePrescribing - Working with eRx

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers how to use NextGen’s ePrescribing tools. These tools will enable you to electronically communicate with any pharmacy, in order to submit patient’s prescriptions and/or to authorize or decline refill requests.

v5.6 Fax Integration Services - Installation

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up the Faxing Universal Preferences, and grant Faxing Rights and Permissions to pertinent users.

v5.6 Fax Integration Services - Setup

Time: 90 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up and configure the NextGen Fax Integration Services, create Microsoft Word format cover pages, set up Dialing and Cover Page Override rules, and fax a prescription, document, and image in the NextGen Electronic Health Record (EHR) application.

v5.6 Graphing in NextGen EHR

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: No Education Plans

In this course, you will learn how to create a graphical representation of patient medical information in the NextGen EHR application.

v5.6 How EPM and EHR Work Together

Time: 30 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6
Prerequisites: None
Appears In: SCT

This course covers how the EHR and EPM applications communicate.
**v5.6 Libraries - Diagnosis Codes**

**Time:** 30 minutes  
**Product:** EHR, EPM, File Maintenance  
**Application Version:** 5.6  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up a diagnosis code library in NextGen File Maintenance.

**v5.6 Libraries - Service Items**

**Time:** 60 minutes  
**Product:** EHR, EPM, File Maintenance  
**Application Version:** 5.6  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers creating, modifying, and copying Service Item Libraries (also referred to as fee schedules).

**v5.6 License Manager**

**Time:** 15 minutes  
**Product:** EHR, EPM  
**Application Version:** 5.6  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course is designed to instruct the student how to use the NextGen license Manager to apply, validate, and update licenses for the various NextGen applications.

**v5.6 Medical Records Module - Allergies**

**Time:** 30 minutes  
**Product:** EHR  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** EHR CGT, EHR End User

This course is designed to instruct the student how to work with the Allergies Module of the Medical Records Module in the Electronic Health Records (EHR) application.

**v5.6 Medical Records Module - Documents**

**Time:** 15 minutes  
**Product:** EHR  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** EHR CGT, EHR End User

This course is designed to instruct the student how to work with the Documents Module of the Medical Records in the Electronic Health Records (EHR) application.
v5.6 Medical Records Module - Images

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User

This course provides an overview of the Images component of the Medical Records Module.

v5.6 Medical Records Module - Medications

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to use the Medications Module in the Electronic Health Records (EHR) application.

v5.6 Medical Records Module - Medications - Legacy

Time: 30 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User

This course is designed to instruct the student how to work with the original Medications Module in the Electronic Health Records (EHR) application.

v5.6 Medical Records Module - Problems

Time: 30 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course provides an overview of the Problems component of the Medical Records Module.

v5.6 Medical Records Module - Procedures

Time: 20 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to work with the Procedures Module in the Electronic Health Records (EHR) application.

v5.6 Medical Records Module - Templates

Time: 25 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider
The purpose of this course is to familiarize the student with the basics of templates and data entry using templates in the EHR Medical Records Module.

**v5.6 NextGen Audit Utility**

- **Time:** 15 minutes  
- **Product:** EHR  
- **Application Version:** 5.6  
- **Continuing Education:** N/A  
- **Prerequisites:** None  
- **Appears In:** No Education Plans  

This course covers how to use the NextGen Audit Utility to track activities related to user tables in your database.

**v5.6 NextGen XML Lab Solution**

- **Time:** 20 minutes  
- **Product:** EHR  
- **Application Version:** 5.6  
- **Continuing Education:** N/A  
- **Prerequisites:** None  
- **Appears In:** No Education Plans  

This course covers how to use the NextGen XML Lab Solution to order lab tests.

**v5.6 Note File Monitor Utility**

- **Time:** 60 minutes  
- **Product:** EHR  
- **Application Version:** 5.6-5.6 SP1  
- **Continuing Education:** N/A  
- **Prerequisites:** None  
- **Appears In:** No Education Plans  

This course will teach you how to set up and use the Note File Monitor Utility.

**v5.6 EHR Offline Document Processor Utility**

- **Time:** 45 minutes  
- **Product:** EHR  
- **Application Version:** 5.6-5.6 SP1  
- **Continuing Education:** N/A  
- **Prerequisites:** None  
- **Appears In:** No Education Plans  

In this course, you will learn how to use the Offline Document Processor to generate a document from a remote workstation.

**v5.6 Overview of File Maintenance**

- **Time:** 45 minutes  
- **Product:** EPM, EHR, File Maintenance  
- **Application Version:** 5.6 SP1  
- **Continuing Education:** N/A  
- **Prerequisites:** None  
- **Appears In:** SCT, EPM SCT Overview, SCT (EPM Only), DWS (EHR Only)  

This course will teach you how to access and use File Maintenance application and how it is used to setup and maintain other NextGen applications.
v5.6 Overview of the Payers System Master File

Time: 30 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6
Prerequisites: None
Appears In: EPM SCT Overview

This course is intended to familiarize the user with the basics of the Payers Master File.

v5.6 Overview of the Providers System Master File

Time: 30 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6
Prerequisites: None
Appears In: EPM SCT Overview

This course is intended to familiarize the user with the basics of the Providers System Master File.

v5.6 Provider Approval Queue for End users

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT, EHR End user

This course covers how to sign off on lab results, documents, and images in the Provider Approval Queue (PAQ).

v5.6 Provider Approval Queue Setup

Time: 15 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT

This course covers how to set up the Provider Approval Queue (PAQ) to work in the Electronic Health Records (EHR) application.

v5.6 Region Editor

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: No Education Plans

This course covers how to use the Region Editor to create an Active Image to be used in the Template Editor application.

v5.6 Rosetta Holding Tank

Time: 45 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: No Education Plans

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This course will teach you how to set up and access the Rosetta Holding Tank-view mismatched records and match records in the Holding Tank.

**v5.6 Security - Creating and Managing User Groups**

- **Time:** 20 minutes
- **Product:** EHR, EPM, System Administrator
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to properly set up and maintain user groups in the System Administrator application.

**v5.6 Security - Creating and Managing Users**

- **Time:** 30 minutes
- **Product:** EHR, EPM, System Administrator
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to create, modify, deactivate, and restore users in the System Administrator application.

**v5.6 Security - Password Requirements for Users**

- **Time:** 15 minutes
- **Product:** EHR, EPM, System Administrator
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers the information the student will need to properly set up and maintain Passwords in the System Administration application.

**v5.6 Security - Patient Sharing**

- **Time:** 30 minutes
- **Product:** EHR, EPM, System Administrator
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up and apply Inclusion and Exclusion Lists for the Electronic Health Records (EHR) and Enterprise Practice Management (EPM) Applications.

**v5.6 Security - Rights and Permissions**

- **Time:** 15 minutes
- **Product:** EHR, EPM, System Administrator
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up security rights and permissions for user groups using the System Administrator application.
v5.6 SetDB Application

Time: 15 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to use the Set Database application to change the active database without manually configuring the ngconfig.ini file.

v5.6 Setting Up the EPM and EHR to Work Together

Time: 60 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT

This course covers how to set up the EPM and EHR applications to allow them to properly share information.

v5.6 System Master Files - Allergies and Allergy Reactions

Time: 20 minutes  
Product: EHR  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, DWS (EHR Only)

This course covers how to set up the system level master files: Allergies - User Defined and Allergy Reactions in the File Maintenance application.

v5.6 System Master Files - Counters

Time: 15 minutes  
Product: EHR, EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up the system level master file Counters in the File Maintenance application.

v5.6 System Master Files - CPT4 Codes

Time: 45 minutes  
Product: EHR, EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up the system level master file CPT4 Codes in the File Maintenance application.

v5.6 System Master Files - DB Picklist Manager

Time: 20 minutes  
Product: EHR  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, DWS (EHR Only)

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The purpose of this course is to instruct the student how to set up the DB Picklist Manager system level master file in the File Maintenance application.

**v5.6 System Master Files - Diagnosis Codes**

- **Time:** 20 minutes
- **Product:** EHR, EPM
- **Continuing Education:** N/A
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Application Version:** 5.6-5.6 SP1
- **Appears In:** SCT, DWS (EHR Only)

This course will teach you how to set up the Diagnosis Categories, Severities, and Statuses System Master Files in the File Maintenance application.

**v5.6 System Master Files - Employers**

- **Time:** 60 minutes
- **Product:** EHR, EPM
- **Continuing Education:** N/A
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Application Version:** 5.6-5.6 SP1
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up the system level master file Employers in the File Maintenance application.

**v5.6 System Master Files - Enterprises**

- **Time:** 20 minutes
- **Product:** EHR, EPM
- **Continuing Education:** N/A
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Application Version:** 5.6-5.6 SP1
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up your enterprise in the NextGen File Maintenance application.

**v5.6 System Master Files - Equipment Field Map**

- **Time:** 15 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Application Version:** 5.6-5.6 SP1
- **Appears In:** SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Equipment Field Map system level master file in the File Maintenance application.

**v5.6 System Master Files - External Interface Map**

- **Time:** 10 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Application Version:** 5.6-5.6 SP1
- **Appears In:** SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the External Interface Map system level master file in the File Maintenance application.
v5.6 System Master Files - External System Setup

Time: 15 minutes  
Product: EHR, File Maintenance  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: No Education Plans

This course is intended to instruct the user how to set up the External System Setup system master file in File Maintenance in order integrate NextGen with the Siemens Global Sessions Manager.

v5.6 System Master Files - ICD9CM

Time: 15 minutes  
Product: EHR, EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course will teach you how to set up the ICD9CM Code System Master File in the File Maintenance application.

v5.6 System Master Files - Introduction

Time: 10 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course will introduce you to the NextGen System Master Files found in File Maintenance.

v5.6 System Master Files - Locations

Time: 60 minutes  
Product: EHR, EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers setting up the Locations system master file in the File Maintenance application.

v5.6 System Master Files - Medication Codes

Time: 45 minutes  
Product: EHR  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, DWS (EHR Only)

This course covers how to set up the system level master files Medications, Medications by Payer, Medications by Payer Group, Medications by Problem, and Medications by Provider in the File Maintenance Application.

v5.6 System Master Files - Medications and Medications By Practice Interface

Time: 20 minutes  
Product: EHR  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, DWS (EHR Only)
This course will teach you how to set up the Medications and Medications By Practice Interface System Master Files in the File Maintenance application.

**v5.6 System Master Files - Modifiers and Modifier Categories**

- **Time:** 20 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the system level master files: Modifiers and Modifier Categories in the File Maintenance Application.

**v5.6 System Master Files - Order AOE Questions and Answers**

- **Time:** 20 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, DWS (EHR Only)

This course covers how to create the Order AOE (Ask at Order Entry) Questions and Order AOE Answers System Master Files to store data used in the Orders Module.

**v5.6 System Master Files - Practices**

- **Time:** 15 minutes
- **Product:** EHR, EPM
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course defines the role that a Practice has in the NextGen applications. Here you will learn how to set up a new Practice Master File.

**v5.6 System Master Files - Order NextGen Test Compendium and Favorites**

- **Time:** 25 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, DWS (EHR Only)

This course covers how to map NextGen defined lab or radiology tests to lab vendors’ tests in the Order NextGen Test Compendium system master file, and set up your favorite test list in the Order Test Favorites system master file.

**v5.6 System Master Files - Order Results Sequences and Notifications**

- **Time:** 20 minutes
- **Product:** EHR
- **Continuing Education:** N/A
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the lab results display order in the Order Results Sequences System Master File and set up the users to receive lab results in the Order Result Notifications System Master File.
v5.6 System Master Files - Order Tests and Components

Time: 25 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

This course covers how to set up the Order Tests and Order Components System Master Files to store data used in the Orders Module.

v5.6 System Master Files - Order XML Categories

Time: 20 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Order XML Categories system level master file in the File Maintenance application.

v5.6 System Master Files - Pharmacies

Time: 20 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Pharmacies system level master file in the File Maintenance application.

v5.6 System Master Files - Printer Aliases

Time: 15 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

This course covers how to set up the system level master file Printer Aliases in the File Maintenance application.

v5.6 System Master Files - Providers

Time: 90 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Providers system level master file in the File Maintenance application.
v5.6 System Master Files - Rx Units

Time: 15 minutes
Product: EHR
Prerequisites: v5.6 System Master Files - Introduction
Appears In: No Education Plans

The purpose of this course is to instruct the student how to set up the Rx Units system level master file in the File Maintenance application.

v5.6 System Master Files - Service Categories

Time: 20 minutes
Product: EHR
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Service Categories system level master file in the File Maintenance application.

v5.6 System Master Files - SIGs

Time: 15 minutes
Product: EHR
Prerequisites: v5.6 System Master Files - Introduction
Appears In: No Education Plans

The purpose of this course is to instruct the student how to set up the SIGs system level master file in the File Maintenance application.

v5.6 System Master Files - Specialties

Time: 15 minutes
Product: EHR, EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up the Specialties system master file in File Maintenance.

v5.6 System Master Files - User Image Descriptions

Time: 15 minutes
Product: EHR
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the User Image Descriptions system level master file in the File Maintenance application.
v5.6 System Master Files - Vaccine Orders

**Time:** 15 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Vaccine Orders system level master file in the File Maintenance application.

v5.6 System Master Files - View Categories

**Time:** 20 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the View Categories system level master file in the File Maintenance application.

v5.6 System Master Files - Zip Codes

**Time:** 30 minutes  
**Product:** EHR, EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Zip Codes system level master file in the File Maintenance application.

v5.6 Template Editor - Adding Fields to a Template

**Time:** 60 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** EHR CGT

This course covers how to add a new field to a template in NextGen’s Template Editor.

v5.6 Template Editor - Basic Triggers

**Time:** 60 minutes  
**Product:** EHR  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up basic triggers on templates using the NextGen Template Editor.
v5.6 Template Editor - Menu Bar and Toolbars

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EHR CGT

This course is intended to familiarize the student with the location and function of the menu and toolbar options in the NextGen Template Editor.

v5.6 Template Editor - Tools Menu

Time: 45 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EHR CGT

This course covers the functions available from the Tools menu in the NextGen Template Editor utility.

v5.6 Template Editor - Working with Templates

Time: 45 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EHR CGT

This course covers how to use the Template Editor to copy or create new templates for the Knowledge Base Model (KBM).

v5.6 Template Import/Export Utility

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: EHR CGT

This course covers how to use the Template Import/Export Utility to import and/or export templates between different NextGen databases.

v5.6 Universal Preferences

Time: 20 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6
Prerequisites: None
Appears In: SCT, DWS (EHR Only)

This course covers the issues your organization needs to address to import and maintain Universal Preferences.
**v5.6 Using File Maintenance**

**Time:** 45 minutes  
**Product:** EHR, EPM  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to navigate the NextGen File Maintenance application.

**v5.6 Working with Significant Events**

**Time:** 20 minutes  
**Product:** EHR, EPM, ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to track selected, system-generated events for logging and auditing purposes for the Enterprise Practice Management (EPM), Imaging Control System (ICS), and Electronic Health Records (EHR) applications.
### v5.6 Advanced Billing - Setting Up Encounter Rate Billing

- **Time**: 60 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: No Education Plans

This course will cover how to set up encounter rate billing in the EPM application.

### v5.6 Advanced Billing - Setting Up Split Billing

- **Time**: 15 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: No Education Plans

This course is designed to instruct the student how to set up split billing.

### v5.6 Advanced Transactions - Account Level Transactions

- **Time**: 30 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: EPM CGT, EPM End User, Biller

This course covers how to enter transactions at the account level.

### v5.6 Advanced Transactions - Credits Setup

- **Time**: 60 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: EPM CGT, EPM End User, Biller

This course covers setting up security rights and master files necessary to create and use credits in the Enterprise Practice Management (EPM) application.

### v5.6 Advanced Transactions - Entering Insurance Transactions

- **Time**: 30 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: EPM CGT, EPM End User, Biller

Covers how to enter transactions received from third party payers in the NextGen Enterprise Practice Management (EPM) application.

### v5.6 Advanced Transactions - Overview of Credits

- **Time**: 15 minutes
- **Product**: EPM
- **Prerequisites**: None
- **Appears In**: EPM CGT, EPM End User, Biller

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This course introduces the student to the types of credits found in the Enterprise Practice Management (EPM) application.

**v5.6 Advanced Transactions - Using Reason Codes**

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Biller

This course is intended to instruct the user how to use reason codes in payment entry in the Enterprise Practice Management (EPM) application.

**v5.6 Advanced Transactions - Working with Line Item Credits**

- **Time:** 60 minutes
- **Continuing Education:** N/A
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Biller

This course covers how to transition a credit from one line item to another in the NextGen Enterprise Practice Management (EPM) application.

**v5.6 Advanced Transactions - Working with Refunds**

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Biller

This course covers how to create a refund transaction in the Enterprise Practice Management (EPM) application.

**v5.6 Advanced Transactions - Working with Unapplied Credits**

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Biller

This course covers how to work with and apply unapplied credits at the Encounter and Account level in the Enterprise Practice Management (EPM) application.

**v5.6 An Overview of the EPM Application**

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT, EPM CGT, EPM End User, Biller, Scheduler, Front Desk

This course provides a brief overview of the Enterprise Practice Management (EPM) application.
**v5.6 Application Launcher**

**Time:** 15 minutes  
**Product:** EHR, EPM  
**Prerequisites:** None  
**Appears In:** All Education Plans  

This course is designed to help you to navigate through the Application Launcher that is used to access the NextGen applications.

**v5.6 Appointment Followup - Appointment Reminders Setup**

**Time:** 45 minutes  
**Product:** EPM  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Front Desk  

This course is designed to instruct the student how to set up and generate appointment reminder letters for upcoming patient appointments.

**v5.6 Appointment Followup - Overview**

**Time:** 20 minutes  
**Product:** EPM  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Front Desk  

This course provides an overview of the appointment follow-up process in the Enterprise Practice Management (EPM) application.

**v5.6 Appointment Followup - Recall Plans Setup**

**Time:** 60 minutes  
**Product:** EPM  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Front Desk  

This course covers how to use appointment recall plans.

**v5.6 Appointment Followup - Working with Appointment Reminders**

**Time:** 30 minutes  
**Product:** EPM  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Front Desk  

This course covers how to use the Appointment Reminder function of the Enterprise Practice Management (EPM) application to remind patients of upcoming appointments.
v5.6 Appointment Followup - Working with Recall Plans

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Front Desk  

This course covers how to use the Recall Plan function of the Enterprise Practice Management (EPM) application to remind patients of the need to schedule upcoming follow-up appointments.

v5.6 Appointment Followup - Worklog Task Setup

Time: 60 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Front Desk  

This course covers how to set up worklog tasks in the Enterprise Practice Management (EPM) application.

v5.6 Appointments - Appointment Scheduling Terms

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EPM SCT, EPM End User, Biller, Scheduler, Front Desk  

This course is intended to familiarize the student with the terms used when scheduling appointments in the Enterprise Practice Management (EPM) application.

v5.6 Appointments - Navigating the Appointment Book

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: SCT, EPM SCT, EPM End User, Scheduler, Front Desk  

This course covers the toolbook icons and appointment views in the EPM Appointment Book.

v5.6 Appointments - Printing a Fee Ticket on Demand

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk  

This course covers how to print an individual fee ticket, as needed, for a patient.

v5.6 Appointments - Scheduling Appointments

Time: 90 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk  

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to set, edit, copy, or reschedule appointments, as well as how to create recurring appointments.

**v5.6 Appointments - Setting up the Appointment Book**

- **Time:** 120 minutes
- **Product:** EPM
- **Application Version:** 5.6-5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course covers how to set up the Appointment Book in the Enterprise Practice Management (EPM) application.

**v5.6 Appointments - Setting Up the Appointment Wait List**

- **Time:** 30 minutes
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course is intended to instruct the student how to set up the Appointment Wait List for use by their practice.

**v5.6 Appointments - Working with the Appointment Waitlist**

- **Time:** 30 minutes
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Scheduler, Front Desk

This course is intended to instruct the student how to use the Appointment Wait List to help patients with scheduling appointments more suited to their needs.

**v5.6 AutoFlow - Checkin and Checkout Setup**

- **Time:** 40 minutes
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course covers setting up the Checkin and Checkout AutoFlow processes in the Enterprise Practice Management (EPM) application.

**v5.6 AutoFlow - Checking Out Patients**

- **Time:** 30 minutes
- **Product:** EPM
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course covers how to check out a patient in the Enterprise Practice Management (EPM) application using the AutoFlow function.
<table>
<thead>
<tr>
<th>Course Title</th>
<th>Time</th>
<th>Continuing Education</th>
<th>Product</th>
<th>Application Version</th>
<th>Prerequisites</th>
<th>Appears In:</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>v5.6 Background Business Processor - Packages Jobs and Schedules</strong></td>
<td>45 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course covers how to set up packages and jobs in the Background Business Processor (BBP).</td>
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<tr>
<td><strong>v5.6 Background Business Processor - Copying Packages Jobs and Schedules</strong></td>
<td>30 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course covers copying packages, jobs, and schedules in the Background Business Process (BBP).</td>
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<tr>
<td><strong>v5.6 Background Business Processor - Introduction</strong></td>
<td>30 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course provides a basic introduction and overview for the Background Business Processor (BBP).</td>
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<tr>
<td><strong>v5.6 Background Business Processor - Setup</strong></td>
<td>30 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course covers how to set up the Background Business Processor (BBP).</td>
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<tr>
<td><strong>v5.6 Bad Debt - Setting Up the Bad Debt Process</strong></td>
<td>30 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6-5.6 SP1</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course covers how to set up the Bad Debt process in the Enterprise Practice Management (EPM) application.</td>
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<tr>
<td><strong>v5.6 Bad Debt - The NextGen Bad Debt Process</strong></td>
<td>20 minutes</td>
<td>N/A</td>
<td>EPM</td>
<td>5.6-5.6 SP1</td>
<td>None</td>
<td>No Education Plans</td>
<td>This course provides an overview of the Bad Debt process in the Enterprise Practice Management (EPM) application.</td>
</tr>
</tbody>
</table>
v5.6 Bad Debt - Outsourcing Bad Debt

Time: 20 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 Bad Debt - NextGen Bad Debt Process
Appears In: No Education Plans

This course will teach you how to outsource bad debt.

v5.6 Bad Debt - Working with Bad Debt

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: No Education Plans

This course covers how to work with bad debt in the Enterprise Practice Management (EPM) application.

v5.6 Billing - Managing Billing and Collections

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers functions that work together to manage the billing and collections process in the EPM application.

v5.6 Billing - The Billing and Collection Process

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course is intended to introduce the student to the basic concepts involved in using the Enterprise Practice Management (EPM) application for billing and collections.

v5.6 Budget Plans - Setting Up the Budget Plan Process

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up the Budget Plan process in the Enterprise Practice Management (EPM) application.

v5.6 Budget Plans - The NextGen Budget Plan Process

Time: 15 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course explains the Budget Plan process of the Enterprise Practice Management (EPM) application.
v5.6 Budget Plans - Working with Budget Plans  
**Time:** 30 minutes  
**Product:** EPM  
**Application Version:** 5.6  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans  

This course provides an overview of how to use budget plans in the NextGen EPM application.

v5.6 Case Management - EPM  
**Time:** 40 minutes  
**Product:** EPM  
**Application Version:** 5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans  

In this 40-minute course, you will learn about setting up and working with the Case Management function in the EPM application.

v5.6 Charges - Working with Charges  
**Time:** 20 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk  

This course is intended to familiarize the student with the Charge Posting window. It also covers how to enter, delete, and void charges.

v5.6 CHC Setup - Encounter Rate Billing  
**Time:** 60 minutes  
**Product:** EPM  
**Application Version:** 5.6  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans  

This course covers how to set up your NextGen application’s encounter rate billing functionality for Federally Qualified Health Centers (FQHCs), Community Health Centers (CHCs), Rural Health Centers (RHCs), and Indian Health Centers (IHCs).

v5.6 CHC Setup - Encounter Tracking  
**Time:** 60 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans  

This course covers setting up a NextGen application to properly handle the specific encounter report data collection needs of Federally Qualified Health Centers (FQHCs), Community Health Centers (CHCs), Rural Health Centers (RHCs), and Indian Health Centers (IHCs).
v5.6 CHC Setup - Government Payer

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans  

This course covers how to set up your NextGen application to properly handle the specific needs of Federally Qualified Health Center (FQHC), Community Health Center (CHC), Rural Health Center (RHC), and Indian Health Center (IHC) for government payers such as Medicare and Medicaid.

v5.6 CHC Setup - Health Center Reports

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Reports - Working with EPM Reports  
Appears In: No Education Plans  

This course will teach you how to work with the NextGen EPM reports that apply specifically to Community Health Centers (CHC) and other similar organizations.

v5.6 CHC Setup - Overview

Time: 10 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans  

This course provides an overview of what is involved in setting up the Federally Qualified Health Center (FQHC), Community Health Center (CHC), Rural Health Center (RHC) and Indian Health Center (IHC) functionality offered in the NextGen application.

v5.6 CHC Setup - Sliding Fee Schedules and Flat Rate Sliding Fees

Time: 100 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: No Education Plans  

This course covers how to set up your NextGen application to properly handle the specific needs of Federally Qualified Health Centers (FQHCs), Community Health Centers (CHCs), Rural Health Centers (RHCs), and Indian Health Centers (IHCs) Sliding Fee Schedules and Flat-Rate Sliding Fees.

v5.6 Claims - Assigning CLIA Numbers

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: v5.6 Using File Maintenance, v5.6 Libraries - Claim Printing, v5.6 Libraries - Service Items, v5.6 System Master File - Locations and v5.6 System Master File - Providers  
Appears In: No Education Plans  

This course covers how to set up Clinical Laboratory Improvement Amendments (CLIA) numbers for use with CMS 1500 claims.
v5.6 Claims - Assigning Mammography Numbers

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: v5.6 Using File Maintenance, v5.6 Libraries - Claim Printing, v5.6 Libraries - Service Items, v5.6 System Master File - Locations and v5.6 System Master File - Providers  
Appears In: No Education Plans  

This course covers how to set NextGen up to properly bill for mammography services using the HCFA 1500 claim form.

v5.6 Claims - Billing Employer and Company Accounts

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: No Education Plans  

This course covers how to use NextGen to create encounters where the employer is the guarantor as well as to create and bill employer invoices for non-encounter charges.

v5.6 Claims - Billing Encounters

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller  

This course covers how to bill encounters using the NextGen EPM (Enterprise Practice Management) application.

v5.6 Claims - Dental Billing

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: v5.6 Using File Maintenance, v5.6 Libraries - Service Items, v5.6 Claims - Claim Edits, v5.6 Libraries - Claim Printing, v5.6 Libraries - Submitter Profiles, v5.6 System Master File - Payers Part One and v5.6 System Master File - Payers Part Two  
Appears In: No Education Plans  

Covers the basics of how to setup and use NextGen’s ADA/A37D dental billing functionality.

v5.6 Claims - DME Billing

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: No Education Plans  

This course covers how to setup NextGen to properly bill for Durable Medical Equipment (DME) claims using the CMS 1500 form.

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v5.6 Claims - Electronic Secondary Claims Setup

Time: 20 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans

This course will teach you to set up your NextGen application to create HIPAA ASC X12N 837 electronic secondary claims when primary payments have been posted manually. (Coordination of Benefits)

v5.6 Claims - Processing Claims

Time: 30 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller

The purpose of this course is to instruct the student how to process claims in the NextGen EPM application.

v5.6 Claims - Provider Based Billing

Time: 45 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6  
Prerequisites: v5.6 Using File Maintenance, v5.6 Libraries - Service Items, v5.6 System Master File - Payers Part One, v5.6 System Master File - Payers Part Two, v5.6 Claims - UB Billing, v5.6 Claims Set Up for HCFA 1500 Electronic Claims and v5.6 Claims Set Up for HCFA 1500 Paper Claims  
Appears In: No Education Plans

This course covers how to set up and use split billing to separate technical and professional charges.

v5.6 Claims - Rebilling Encounters and Regenerating Claims

Time: 30 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller

This course is intended to instruct the student how to rebill encounters and regenerate archived claims using the NextGen EPM application.

v5.6 Claims - Professional/CMS 1500 Claim Setup

Time: 60 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6  
Prerequisites: v5.6 Using File Maintenance, v5.6 Libraries - Claim Edits, v5.6 Libraries - Claim Printing, v5.6 Libraries - Submitter Profiles, v5.6 Creating Practices, v5.6 Overview of the Payers System Master File, v5.6 System Master Files - Transaction Codes, v5.6 Practice Master File - Groups and v5.6 Overview of the Providers System Master File  
Appears In: EPM CGT, EPM End User, Biller

This course takes you through the major steps of setting up NextGen to be able to submit printed and electronic claims using the HCFA/CMS 1500 claim forms.
**v5.6 Claims - Supervisor Billing**

**Time:** 40 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Using File Maintenance, v5.6 System Master File - Providers, v5.6 System Master File - Payers Part One and v5.6 System Master File - Payers Part Two and v5.6 Libraries - Submitter Profiles  
**Appears In:** No Education Plans

This course is intended to instruct the student how to set up and use NextGen’s supervisor billing functionality.

---

**v5.6 Claims - UB Billing**

**Time:** 45 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to setup and use NextGen’s UB institutional billing functionality for both practices that do some, but not exclusive, UB billing as well as those that do exclusive UB billing.

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**v5.6 Claims - Workers Compensation Billing**

**Time:** 20 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up NextGen to properly bill for Workers’ Compensation claims.

---

**v5.6 Code Tables**

**Time:** 30 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** SCT, EPM SCT

This course covers how to view and modify the Code Tables in the File Maintenance application and demonstrates how the code tables are used in the Enterprise Practice Management (EPM) application.

---

**v5.6 Contract Utility**

**Time:** 45 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction, v5.6 Overview of the Payers System Master File, v5.6 Libraries - Contracts  
**Appears In:** No Education Plans

This course will teach you how to use the Contract Utility tool.
v5.6 Creating a Fee Ticket

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: SCT, EPM SCT Overview, EPM SCT

This course covers how to create a fee ticket body and embed it into the Enterprise Practice Management (EPM) application.

v5.6 Creating Locations

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR, EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course is intended to instruct the student how to set up Locations in NextGen File Maintenance.

v5.6 Credit Card Processing - Adding Deleting and Voiding a Payment

Time: 40 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: 5.6 Practice Preferences - Introduction, 5.6 Transactions - Overview of Payment Processing  
Appears In: No Education Plans

This course will teach you how to enter and remove credit card payments. In addition, you will learn how to track those credit card payments that are deleted from a payment posting batch.

v5.6 Credit Card Processing - Setup

Time: 10 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction, v5.6 Transactions - Overview of Payment Processing  
Appears In: No Education Plans

This course will teach you how to set up your practice to use the Credit Card and Check processing feature.

v5.6 Demographics - Adding a New Demographic Record

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 EPM - Navigating the Application Desktop, v5.6 Overview of the Patient Information Window  
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to instruct the student how to add a new person's demographic information to the Master Person Index (MPI).
v5.6 Demographics - Overview of the Patient Chart

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to familiarize the student with the components of the Patient Chart.

v5.6 Demographics - Overview of the Patient Information Window

Time: 40 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to familiarize the student with the components of the Patient Information window.

v5.6 Demographics - Overview of the People and Patient Lookup Windows

Time: 20 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to familiarize the student with the components of the People Lookup and the Patient Lookup windows.

v5.6 Demographics - Person Records vs. Patient Charts

Time: 15 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to explain the differences, in form and use, between the Person Record and the Patient Chart.

v5.6 Demographics - Updating a Patient’s Address

Time: 15 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Scheduler, Front Desk

The purpose of this course is to instruct the student how to update a patient’s address and the addresses of the patient’s relations.
v5.6 Determining and Assigning Organizational Levels

Time: 30 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, EPM SCT Overview, EPM SCT, DWS (EHR Only)

This course covers the issues you need to explore to determine the NextGen hierarchical setup for your organization.

v5.6 Encounters - Checking in Patients and Creating Encounters

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers checking in and creating encounters for both new and existing patient in the Enterprise Practice Management (EPM) application.

v5.6 Encounters - Overview of Encounters

Time: 15 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course is intended to introduce the student to encounters in the Enterprise Practice Management (EPM)application.

v5.6 Encounters - The Create Encounter and Encounter Maintenance Windows

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

The purpose of this course is to introduce the student to the Create Encounter and Encounter Maintenance windows.

v5.6 Enterprise Preferences

Time: 45 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, EPM SCT Overview, EPM SCT

This course covers how to set up your enterprise level NextGen preferences.

v5.6 EPM - Common Buttons Fields and Features

Time: 20 minutes  
Product: EPM  
Prerequisites: None  
Appears In: SCT, EPM SCT, EPM CGT, EPM End User, Biller, Scheduler, Front Desk
This course is designed to provide an overview of the common buttons, fields, and features found in the Enterprise Practice Management (EPM) application.

**v5.6 EPM - Navigating the Application Desktop**

<table>
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<th>Time:</th>
<th>15 minutes</th>
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<tr>
<td>Prerequisites:</td>
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<td></td>
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<tr>
<td>Appears In:</td>
<td>SCT, EPM SCT, EPM CGT, EPM End User, Biller, Scheduler, Front Desk</td>
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</tbody>
</table>

This course is intended to familiarize the student with the visual interface for the Enterprise Practice Management (EPM) application.

**v5.6 EPM User Preferences - Administration**

<table>
<thead>
<tr>
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<tr>
<td>Prerequisites:</td>
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</tr>
<tr>
<td>Appears In:</td>
<td>SCT, EPM SCT</td>
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</table>

This course covers how to set Practice level Default User Preferences for the Enterprise Practice Management (EPM) application.

**v5.6 EPM User Preferences - General**

<table>
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<tr>
<td>Appears In:</td>
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</table>

This course covers how to set general user preferences within the Enterprise Practice Management (EPM) application.

**v5.6 EPM User Preferences - Scheduling**

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<td>Appears In:</td>
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This course covers the steps necessary to set up user preferences for the Electronic Practice Management (EPM) appointment book.

**v5.6 ERA - Electronic Remittance Advice Setup**

<table>
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<td>Appears In:</td>
<td>No Education Plans</td>
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</table>

This course covers how to set up your NextGen system for Electronic Remittance Advice (ERA) processing.
v5.6 ERA - Processing Electronic Remittance Advices

**Time:** 60 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the basics of how to process Electronic Remittance Advices (ERAs) in the EPM application.

---

v5.6 Guarantor Accounts

**Time:** 40 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk

This course provides an overview of guarantor accounts in the Enterprise Practice Management (EPM) application.

---

v5.6 How EPM and EHR Work Together

**Time:** 30 minutes  
**Product:** EHR, EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** SCT

This course covers how the EHR and EPM applications communicate.

---

v5.6 Insurance - Adding an Authorization

**Time:** 30 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Scheduler

This course covers how to add a pre-certification or authorization code to a patient’s insurance. There is also an optional simulation on how to add a referral to a patient’s insurance and encounter.

---

v5.6 Insurance - Adding an Employer with Insurance

**Time:** 15 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Scheduler

This course covers how to add an employer with insurance to a patient’s chart.

---

v5.6 Insurance - Adding Insurance to a Person

**Time:** 45 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.6  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Scheduler

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course provides an overview of the Insurance Maintenance window and covers how to attach insurance to a person’s demographic record.

**v5.6 Introduction to the EPM**

- **Time:** 45 minutes
- **Product:** EPM
- **Continuing Education:** N/A
- **Application Version:** 5.6 SP1
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT Overview, EPM SCT, EPM CGT, EPM End User, Biller, Scheduler, Front Desk

This course will teach you to identify the important features and functionalities of the NextGen EPM application and help you to understand application’s key role in billing and collections workflow cycle.

**v5.6 Libraries - Anesthesia Modifiers**

- **Time:** 45 minutes
- **Product:** EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course covers how to set up an Anesthesia Modifiers library in NextGen’s File Maintenance application.

**v5.6 Libraries - Claim Edits**

- **Time:** 30 minutes
- **Product:** EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course covers how to set up Claim Edit Libraries in the File Maintenance application.

**v5.6 Libraries - Claim Printing**

- **Time:** 30 minutes
- **Product:** EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course covers how to set up Claim Print Libraries in the File Maintenance application.

**v5.6 Libraries - Contracts**

- **Time:** 30 minutes
- **Product:** EPM
- **Continuing Education:** N/A
- **Application Version:** 5.6
- **Prerequisites:** None
- **Appears In:** SCT, EPM SCT

This course covers how to set up contract libraries in the File Maintenance application.
v5.6 Libraries - Diagnosis Codes

Time: 30 minutes
Product: EHR, EPM, File Maintenance
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to set up a diagnosis code library in NextGen File Maintenance.

v5.6 Libraries - GPCI Codes

Time: 30 minutes
Product: EPM
Prerequisites: None
Appears In: SCT, EPM SCT

This course is intended to instruct the student how to set up the GPCI library in NextGen File Maintenance.

v5.6 Libraries - Places of Service

Time: 30 minutes
Product: EPM
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to set up Places of Service libraries in the NextGen File maintenance application.

v5.6 Libraries - Reason Codes

Time: 30 minutes
Product: EPM
Prerequisites: None
Appears In: SCT, EPM SCT

This tutorial covers how to set up the Reason Codes Library in the File Maintenance Application.

v5.6 Libraries - RVU

Time: 45 minutes
Product: EPM
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to create and modify an RVU library in the File Maintenance application.

v5.6 Libraries - Service Item Exceptions

Time: 30 minutes
Product: EPM
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to set up Service Item Exceptions in the File Maintenance application.
v5.6 Libraries - Service Item Global Updates

Time: 20 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to update all Service Items (SIMs) at one time using the SIM Global Update feature in the Service Item library.

v5.6 Libraries - Service Item Groups

Time: 60 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to set up Service Item groups within the Service Item library in File Maintenance.

v5.6 Libraries - Service Items

Time: 60 minutes  Continuing Education: N/A
Product: EHR, EPM, File Maintenance  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers creating, modifying, and copying Service Item Libraries (also referred to as fee schedules).

v5.6 Libraries - Submitter Profiles

Time: 40 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT

This course covers how to set up Submitter Profile libraries in the NextGen File Maintenance application.

v5.6 Libraries - Tax Rate

Time: 20 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to set up Tax Rate libraries in the NextGen File Maintenance application.

v5.6 Libraries - Types of Service

Time: 30 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT

This course covers how to set up Types of Service libraries in the NextGen File Maintenance application.

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v5.6 License Manager

Time: 15 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course is designed to instruct the student how to use the NextGen license Manager to apply, validate, and update licenses for the various NextGen applications.

v5.6 Master Lists

Time: 30 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: SCT, EPM SCT

This course covers how to modify master lists in the NextGen File maintenance application.

v5.6 Master Lists - Financial Classes

Time: 15 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: SCT, EPM SCT

This course covers how to set up the system master list Financial Classes in the File Maintenance application.

v5.6 Overview of Appointment Setup - Scheduling, Autoflow, and Followup

Time: 45 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will provide you with an overview of appointment setup, which includes scheduling, autoflow, and follow-up process.

v5.6 Overview of Billing Setup

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will teach you how the charges entered during charge entry process are billed and how the data required for the billing process is set up in the NextGen applications.
v5.6 Overview of Charges and Contracts Setup

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6 SP1  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will teach you the basics of charge entry setup.

v5.6 Overview of Collection Setup

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6 SP1  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will teach you the basics of the Collection Process and how the NextGen applications are set up for this process.

v5.6 Overview of File Maintenance

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM, EHR, File Maintenance  
Application Version: 5.6 SP1  
Prerequisites: None  
Appears In: SCT, EPM SCT Overview, EPM SCT, DWS (EHR Only)

This course will teach you how to access and use the File Maintenance application and how it is used to setup and maintain other NextGen applications.

v5.6 Overview of the Payers System Master File

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR, EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course is intended to familiarize the user with the basics of the Payers Master File.

v5.6 Overview of Payment Posting Setup

Time: 40 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6 SP1  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will teach you the basics of Payment Posting Process and how the NextGen applications are set up to perform this process.
v5.6 Overview of the Providers System Master File

Time: 30 minutes  
Product: EHR, EPM  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course is intended to familiarize the user with the basics of the Providers System Master File.

v5.6 Overview of System Security

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM SCT Overview, EPM SCT

This course will teach you how NextGen practices and maintains various measures to secure its system from any potential threats.

v5.6 Practice Master File - Groups

Time: 45 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: SCT, EPM SCT

This course is intended to instruct the student how to set up the Groups Practice Master File in NextGen File Maintenance.

v5.6 Practice Master File - Letters

Time: 30 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: SCT, EPM SCT

This course is intended to instruct the student how to set up the Letters Practice Master File in NextGen File Maintenance.

v5.6 Practice Master File - Marketing Plans

Time: 15 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: SCT, EPM SCT

This course covers how to create a Marketing Plan and how to collect and report on this information in the NextGen EPM application.
v5.6 Practice Master File - Patient Statuses

Time: 30 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EPM SCT  

This course is intended to instruct the student how to set up the Patient Statuses Practice Master File in NextGen File Maintenance.

v5.6 Practice Master File - Report Types

Time: 15 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EPM SCT  

This course is intended to instruct the student how to set up the Report Types practice master file in NextGen File Maintenance.

v5.6 Practice Preferences - Alerts

Time: 10 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you to configure the option settings of the ‘Alerts’ Practice Preferences.

v5.6 Practice Preferences - Appointment Scheduling

Time: 10 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you to configure the option settings of the ‘Appointment Scheduling’ Practice Preferences.

v5.6 Practice Preferences - Budget Accounts

Time: 10 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you to configure the option settings of the ‘Budget Accounts’ Practice Preferences.

v5.6 Practice Preferences - Charge Entry

Time: 30 minutes  Continuing Education: N/A  
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

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This course will teach you to configure the option settings of the ‘Charge Entry’ Practice Preferences.

**v5.6 Practice Preferences - Chart**

- **Time:** 30 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Chart’ Practice Preferences.

**v5.6 Practice Preferences - Claims**

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Claims’ Practice Preferences.

**v5.6 Practice Preferences - Contract Edits**

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Contract Edits’ Practice Preferences.

**v5.6 Practice Preferences - Data and Fee Tickets**

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Data/Fee Ticket’ Practice Preferences.

**v5.6 Practice Preferences - EHR**

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

This course will teach you to configure the option settings of the ‘EHR’ Practice Preferences.

**v5.6 Practice Preferences - Encounters**

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** v5.6 Practice Preferences - Introduction
- **Appears In:** SCT, EPM SCT

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This course will teach you to configure the option settings of the ‘Encounters’ Practice Preferences.

**v5.6 Practice Preferences - External**

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This course will teach you how to set up the External preferences for your practice.

**v5.6 Practice Preferences - Forms**

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</table>

This course will teach you to Configure the option settings of the ‘Forms’ Practice Preferences.

**v5.6 Practice Preferences - General**

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<td>Appears In:</td>
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This course will teach you to configure the option settings of the ‘General’ Practice Preferences.

**v5.6 Practice Preferences - Holidays**

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This course will teach you the Holiday Practice Preferences and how to set them up.

**v5.6 Practice Preferences - Introduction**

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</table>

This course is intended to familiarize you with Practice Preferences and is a prerequisite to all other Practice Preference courses.
v5.6 Practice Preferences - Invoices

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you about the options available in ‘Invoices’ Practice Preferences.

v5.6 Practice Preferences - Itemized Bills

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you to configure your practice’s itemized bill options and default messages.

v5.6 Practice Preferences - Libraries

Time: 5 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you the use of default libraries and how to assign them.

v5.6 Practice Preferences - Medication

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you how to set up the Medication Preferences for your practice.

v5.6 Practice Preferences - Order Module

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you about the options available in ‘Order Module’ Practice Preferences.

v5.6 Practice Preferences - Patient Pay

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT  

This course will teach you to assign the settings and Transaction Codes your practice will use for patient payments that are imported from a financial institution as an Electronic Remittance Advice (ERA) file.

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v5.6 Practice Preferences - Payment Processing

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Payment Processing’ Practice Preferences.

v5.6 Practice Preferences - Printing

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you about the options available in ‘Printing’ Practice Preferences.

v5.6 Practice Preferences - Provider

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you how to define, at the practice level, the different specialties of providers that a patient has seen or is scheduled to see.

v5.6 Practice Preferences - Reports

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you how to set up your report preferences for your practice.

v5.6 Practice Preferences - Sliding Fee

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you to customize sliding fee schedules to the needs of a specific practice.

v5.6 Practice Preferences - Statements

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: v5.6 Practice Preferences - Introduction  
Appears In: SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Statements’ Practice Preferences.
v5.6 Practice Preferences - Tasks

Time: 10 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 Practice Preferences - Introduction
Appears In: SCT, EPM SCT

This course will teach you to configure the option settings of the ‘Tasks’ Practice Preferences.

v5.6 Practice Preferences - Tran Codes

Time: 15 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 Practice Preferences - Introduction
Appears In: SCT, EPM SCT

This course will teach you about the options available in ‘Tran Codes’ Practice Preferences.

v5.6 Practice Preferences - Transactions

Time: 20 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 Practice Preferences - Introduction
Appears In: SCT, EPM SCT

This course will teach you about the options available in ‘Transactions’ Practice Preferences.

v5.6 Real-time Transaction Server - Setup

Time: 60 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers the basics of how to setup the Real-time Transaction Server (RTS) functionality.

v5.6 Real-time Transaction Server - Using RTS

Time: 90 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6
Prerequisites: None
Appears In: No Education Plans

This course covers how to use the NextGen Real-time Transaction Server (RTS) for referral and eligibility processing.

v5.6 Reports - Troubleshooting Your EPM Reports

Time: 25 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: No Education Plans

This course covers troubleshooting reports in the Enterprise Practice Management (EPM) application.
**v5.6 Reports - Working with AR Reports**

**Time:** 40 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to work with Accounts Receivable (AR) reports in the Enterprise Practice Management (EPM) application.

**v5.6 Reports - Working with Daily Reports**

**Time:** 20 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Reports - Working with EPM Reports  
**Appears In:** No Education Plans

This course will teach you how to work with Daily Reports in the EPM application.

**v5.6 Reports - Working With EPM Reports**

**Time:** 45 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers working with reports in the Enterprise Practice Management (EPM) application.

**v5.6 Reports - Working with General Reports**

**Time:** 30 minutes  
**Product:** EPM  
**Application Version:** 5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

In this 15-minute course, you will learn about working with the General reports in the Enterprise Practice Management (EPM) application.

**v5.6 Reports - Working with Monthly Reports**

**Time:** 30 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course is intended to instruct the student in how to run, read, and compare monthly reports in the Enterprise Practice Management (EPM) application.
v5.6 Reports - Working with Scheduling Reports

Time: 15 minutes
Product: EPM
Prerequisites: None
Appears In: No Education Plans

This course will teach you about working with the Scheduling reports in the Enterprise Practice Management (EPM) application.

v5.6 Security - Creating and Managing User Groups

Time: 20 minutes
Product: EHR, EPM, System Administrator
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to properly set up and maintain user groups in the System Administrator application.

v5.6 Security - Creating and Managing Users

Time: 30 minutes
Product: EHR, EPM, System Administrator
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to create, modify, deactivate, and restore users in the System Administrator application.

v5.6 Security - Password Requirements for Users

Time: 15 minutes
Product: EHR, EPM, System Administrator
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers the information the student will need to properly set up and maintain Passwords in the System Administration application.

v5.6 Security - Patient Sharing

Time: 30 minutes
Product: EHR, EPM, System Administrator
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to set up and apply Inclusion and Exclusion Lists for the Electronic Health Records (EHR) and Enterprise Practice Management (EPM) Applications.
v5.6 Security - Rights and Permissions

Time: 15 minutes  Continuing Education: N/A
Product: EHR, EPM, System Administrator  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to set up security rights and permissions for user groups using the System Administrator application.

v5.6 SetDB Application

Time: 15 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6
Prerequisites: None
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers how to use the Set Database application to change the active database without manually configuring the ngconfig.ini file.

v5.6 Setting Up the EPM and EHR to Work Together

Time: 60 minutes  Continuing Education: N/A
Product: EHR, EPM  Application Version: 5.6
Prerequisites: None
Appears In: SCT

This course covers how to set up the EPM and EHR applications to allow them to properly share information.

v5.6 Statements - Generating an Individual Statement on Demand

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller

This course covers generating a single statement as needed.

v5.6 Statements - Generating Statements in a Batch

Time: 45 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller

This course is intended to introduce the student to the statement batch process in the Enterprise Practice Management (EPM) application.
v5.6 Statements - Setting up Payer Specific Dunning Messages

Time: 30 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, Biller  

This course covers setting up dunning messages for a specific payer or financial class.

v5.6 Statements - Setting Up Your Statement Process

Time: 60 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: EPM CGT, Biller  

This course covers setting up the statement process in the Enterprise Practice Management (EPM) application.

v5.6 System Master Files - Collection Agencies

Time: 30 minutes  
Product: EPM  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT  

This course covers how to set up the system level master file Collection Agencies in the File Maintenance application.

v5.6 System Master Files - Counters

Time: 15 minutes  
Product: EHR, EPM  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT, DWS (EHR Only)  

This course covers how to set up the system level master file Counters in the File Maintenance Application.

v5.6 System Master Files - CPT4 Codes

Time: 45 minutes  
Product: EHR, EPM  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT, DWS (EHR Only)  

This course covers how to set up the system level master file CPT4 Codes in the File Maintenance Application.

v5.6 System Master Files - Diagnosis Codes

Time: 20 minutes  
Product: EPM, EHR  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT, DWS (EHR Only)  

This course will teach you how to set up the Diagnosis Categories, Severities, and Statuses System Master Files in the File Maintenance application.

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v5.6 System Master Files - DME Regions

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT

The purpose of this course is to instruct the student how to set up the system level master file DME Regions in the File Maintenance application in order to bill for durable medical equipment.

v5.6 System Master Files - Employers

**Time:** 60 minutes  
**Continuing Education:** N/A  
**Product:** EHR, EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT, DWS (EHR Only)

This course covers how to set up the system level master file Employers in the File Maintenance Application.

v5.6 System Master Files - Enterprises

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EPM, EHR  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT, DWS (EHR Only)

This course covers how to set up your enterprise in the NextGen File Maintenance application.

v5.6 System Master Files - Form and Label Templates

**Time:** 60 minutes  
**Continuing Education:** N/A  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT

This course covers the use of the Form Templates and Label Templates System Master Files.

v5.6 System Master Files - Formats

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT

This course covers how to set up the system level master file Formats in the File Maintenance Application.

v5.6 System Master Files - ICD9CM

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** EPM, EHR  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, EPM SCT, DWS (EHR Only)

This course will teach you how to set up the ICD9CM Code System Master File in the File Maintenance application.

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v5.6 System Master Files - Introduction

Time: 10 minutes  
Product: EPM, EHR  
Prerequisites: None  
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course will introduce you to the NextGen System Master Files found in File Maintenance.

v5.6 System Master Files - Label Products

Time: 30 minutes  
Product: EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT

This course covers how to set up the Label Products system master file in the File Maintenance application.

v5.6 System Master Files - Locations

Time: 60 minutes  
Product: EHR, EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT, DWS (EHR Only)

This course covers setting up the Locations system master file in the File Maintenance application.

v5.6 System Master Files - Patient Responsibility

Time: 30 minutes  
Product: EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT

This course covers how to set up the Patient Responsibility system master file in the File Maintenance application.

v5.6 System Master Files - Payers Part One

Time: 30 minutes  
Product: EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT

This is the first of two courses that cover how to set up the system level master file Payers in the File Maintenance Application. This course covers the options on the Defaults 1 and Defaults 2 tabs.

v5.6 System Master Files - Payers Part Two

Time: 45 minutes  
Product: EPM  
Prerequisites: v5.6 System Master Files - Introduction  
Appears In: SCT, EPM SCT, DWS (EHR Only)
This is the second of two courses that cover how to set up the system level master file Payers in the File Maintenance Application.

**v5.6 System Master Files - Practices**

<table>
<thead>
<tr>
<th>Time: 15 minutes</th>
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<tbody>
<tr>
<td>Product: EPM, EHR</td>
<td>Application Version: 5.6-5.6 SP1</td>
</tr>
<tr>
<td>Prerequisites: v5.6 System Master Files - Introduction</td>
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</table>

This course defines the role that a Practice has in the NextGen applications. Here you will learn how to set up a new Practice Master File.

**v5.6 System Master Files - Providers**

<table>
<thead>
<tr>
<th>Time: 90 minutes</th>
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</thead>
<tbody>
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</table>

The purpose of this course is to instruct the student how to set up the Providers system level master file in the File Maintenance application.

**v5.6 System Master Files - Revenue Codes**

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<thead>
<tr>
<th>Time: 15 minutes</th>
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<tbody>
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</tbody>
</table>

This tutorial covers how to set up the system level master file Revenue Codes in the File Maintenance Application.

**v5.6 System Master Files - Sliding Fee Schedules**

<table>
<thead>
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</tbody>
</table>

This course covers how to set up the Sliding Fee Schedules system master file in File Maintenance.

**v5.6 System Master Files - Specialties**

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</table>

This course covers how to set up the Specialties system master file in File Maintenance.

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v5.6 System Master Files - Task Types

Time: 60 minutes
Product: EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT

The purpose of this course is to instruct the student how to set up the system level master file Task Types in the File Maintenance application.

v5.6 System Master Files - Taxonomy Codes

Time: 20 minutes
Product: EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT

This course covers how to set up the system level master file Taxonomy Codes in the File Maintenance Application.

v5.6 System Master Files - Transaction Codes

Time: 30 minutes
Product: EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT

This course covers how to set up the Transaction Codes System Master File in the File Maintenance application.

v5.6 System Master Files - User Note Descriptions

Time: 30 minutes
Product: EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT

This course covers how to set up the system level master file User Note Descriptions in the File Maintenance Application.

v5.6 System Master Files - Zip Codes

Time: 30 minutes
Product: EHR, EPM
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, EPM SCT, DWS (EHR Only)

The purpose of this course is to instruct the student how to set up the Zip Codes system level master file in the File Maintenance application.
v5.6 Transactions - Implementing 5010 837 Electronic Claim Transactions

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans

This course will teach you how to set up the system-level master file Locations in the File Maintenance application.

v5.6 Transactions - Overview of Payment Processing

Time: 45 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller, Front Desk  

This course is an overview of how to process payments and their related adjustment and refund transactions.

v5.6 Transactions - Overview of Payment Processing Setup

Time: 30 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: EPM CGT  

In this course we will look at an overview of the general areas of your NextGen EPM application that will need to be set up in order to properly process payments and their related adjustment and refund transactions.

v5.6 Using File Maintenance

Time: 45 minutes  
Continuing Education: N/A  
Product: EHR, EPM  
Application Version: 5.6  
Prerequisites: None  
Appears In: SCT, EPM SCT, DWS (EHR Only)  

This course covers how to navigate the NextGen File Maintenance application.

v5.6 Working with Significant Events

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR, EPM, ICS  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans  

Covers how to track selected, system-generated events for logging and auditing purposes for the Enterprise Practice Management (EPM), Imaging Control System (ICS), and Electronic Health Records (EHR) applications.

v5.6 Worklog Manager - Administration

Time: 60 minutes  
Continuing Education: N/A  
Product: EPM  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans  

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to properly enable the use of the Worklog Manager in NextGen’s Enterprise Practice Management (EPM) application.

**v5.6 Worklog Manager - Introduction**

**Time:** 20 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course is intended to introduce the student to the Worklog Manager, a system to automate the creation, working, and completion of some worklog tasks.

**v5.6 Worklog Manager - Task Reports**

**Time:** 20 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course instructs the user how to run and use reports related to the Worklog Manager.

**v5.6 Worklog Manager - Using Worklog Manager**

**Time:** 45 minutes  
**Product:** EPM  
**Application Version:** 5.6-5.6 SP1  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the functions of the Worklog Manager, including how to create tasks, follow up on tasks, and complete tasks in the NextGen EPM application.
v5.6 ICS - Attaching an EOB

Time: 30 minutes  
Product: ICS  
Prerequisites: None  
Appears In: No Education Plans

This course is designed to instruct the student how to use the NextGen ICS (Image Control System) specifically for attaching EOB (Explanation Of Benefits) scans to their appropriate NextGen EPM encounters.

v5.6 ICS - Getting Started

Time: 30 minutes  
Product: ICS  
Prerequisites: None  
Appears In: No Education Plans

This course is designed to instruct the student in the basics of navigating and using the NextGen Image Control System (ICS) application.

v5.6 ICS Setup - Attaching an EOB Scan

Time: 60 minutes  
Product: ICS  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up NextGen ICS (Image Control System) specifically for attaching EOB (Explanation Of Benefits) scans to their appropriate NextGen EPM encounters.

v5.6 ICS Setup - File Maintenance

Time: 60 minutes  
Product: ICS  
Prerequisites: None  
Appears In: No Education Plans

This course is designed to instruct the student how to set up the File Maintenance tables used in the NextGen ICS application.

v5.6 ICS Setup - Remote Scanning

Time: 40 minutes  
Product: ICS  
Prerequisites: v5.6 ICS - Getting Started  
Appears In: No Education Plans

This course will teach you how to set up ICS for remote scanning.
### v5.6 ICS Setup - Security and Administration

**Time:** 20 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course is designed to instruct the student how to set up additional, ICS specific, security options and administrative options for users.

### v5.6 ICS Setup - System Administrator

**Time:** 15 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course is designed to instruct the student how to set up Operation rights for NextGen ICS within the System Administrator application.

### v5.6 ICS Usage - Reports

**Time:** 30 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how use the report writer within ICS to run ICS specific reports.

### v5.6 ICS Usage - Scanning and Batches

**Time:** 30 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

Covers how to acquire and save images in NextGen ICS.

### v5.6 ICS Usage - Searching and Search Results

**Time:** 30 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

Covers how to search for documents using the NextGen ICS Image Lookup.

### v5.6 ICS Usage - Viewer Tools

**Time:** 30 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans

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Covers the options available on the ICS Viewer Toolbar, as well as how to annotate documents.

### v5.6 ICS Usage - Workflow and PAQ Integration

**Time:** 30 minutes  
**Product:** ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans  

Covers how the Workflow and PAQ (Provider Approval Queue) modules are used from the ICS application.

### v5.6 Working with Significant Events

**Time:** 30 minutes  
**Product:** EHR, EPM, ICS  
**Prerequisites:** None  
**Appears In:** No Education Plans  

Covers how to track selected, system-generated events for logging and auditing purposes for the Enterprise Practice Management (EPM), Imaging Control System (ICS), and Electronic Health Records (EHR) applications.
Knowledge Base Model (KBM) - 7.9

v5.6 KBM Templates - Assessment

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to electronically document your patient’s diagnosis using the Assessment template in NextGen’s EHR application.

v5.6 KBM Templates - Document Library

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you how use this template to launch, complete, and generate a variety of letters, documents, and forms.

v5.6 KBM Templates - Family History

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you how use this template to launch, complete, and generate a variety of letters, documents, and forms.

v5.6 KBM Templates - HPI

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you how use this template to document the details of your patient’s chief concern / reason for visit.

v5.6 KBM Templates - Immunizations

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to order and document immunizations using the Immunization templates.
v5.6 KBM Templates - Order Management and Order Administration

Time: 30 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to use the Order Administration and Order Management templates to cosign-review, alter status, and delete orders that have been placed for your patient.

v5.6 KBM Templates - Past Medical History

Time: 30 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document your patient’s history of surgical and diagnostic procedures in NextGen.

v5.6 KBM Templates - Physical Exam

Time: 30 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document your patients’ physical exams using the NextGen Physical Exam template.

v5.6 KBM Templates - Problem List

Time: 30 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document a patient’s chronic conditions by using the Problem List template in the NextGen EHR.

v5.6 KBM Templates - Procedures

Time: 30 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to order patient procedures using the Procedures template in NextGen EHR.

v5.6 KBM Templates - Protocols

Time: 60 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider
This course will teach you the features and functions of the Protocols template and the steps used on the practice template for setting up new protocols and editing existing ones.

**v5.6 KBM Templates - Review of Systems**

- **Time:** 30 minutes
- **Product:** EHR
- **Prerequisites:** None
- **Specialty Add-On For:** EHR CGT, Provider

This course will teach you how to document your patients’ physical exam results using the Review of Systems template in NextGen EHR.

**v5.6 KBM Templates - Social History**

- **Time:** 30 minutes
- **Product:** EHR
- **Prerequisites:** None
- **Specialty Add-On For:** EHR CGT, Provider

This course will teach you how to document your patient’s social history using the Social History template.

**v5.6 KBM Workflow - Behavioral Health Initial Psych Eval**

- **Time:** 90 minutes
- **Product:** EHR
- **Prerequisites:** None
- **Specialty Add-On For:** EHR CGT, Provider

This course will teach you to how to navigate through a BH Initial Psych Eval as well as a follow-up medication (psychopharm) encounter.

**v5.6 KBM Workflow - Behavioral Health Intake**

- **Time:** 90 minutes
- **Product:** EHR
- **Prerequisites:** None
- **Specialty Add-On For:** EHR CGT, Provider

This course will teach you to how to navigate through a BH Intake workflow-as well as a follow-up encounter.

**v5.6 KBM Workflow - Cardiology**

- **Time:** 90 minutes
- **Product:** EHR
- **Prerequisites:** None
- **Specialty Add-On For:** EHR CGT, Provider

This course will teach you to how to navigate through a Cardiology workflow for both the nurse/medical assistant and the provider.
v5.6 KBM Workflow - Correctional Health Management

Time: 70 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you to how to navigate through a intake workflow for Correctional Health Management.

v5.6 KBM Workflow - Dermatology

Time: 90 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you to how to navigate through a general dermatology workflow for both the nurse and the provider.

v5.6 KBM Workflow - ENT

Time: 70 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you to how to navigate through an ENT workflow for both the nurse/medical assistant and the provider.

v5.6 KBM Workflow - Gastroenterology

Time: 90 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you to how to navigate through a general gastroenterology workflow for both the nurse and the provider.

v5.6 KBM Workflow - General Surgery

Time: 90 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None  KBM Version: 7.9
Specialty Add-On For: EHR CGT, Provider

This course will teach you to how to navigate through a general surgery workflow for both the nurse and the provider.
v5.6 KBM Workflow - Gynecology

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
KBM Version: 7.9

This course will walk you through the Nurse and Provider workflows for a Gynecology office visit.

v5.6 KBM Workflow - Internal Medicine/Family Practice

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
KBM Version: 7.9

This course will teach you the Internal Medicine/Family Practice Nurse and Provider workflows of the new Advanced Template Set for KBM 7.9. This new tabbed template set features seven new templates with a unique user interface and a clinically relevant workflow. This course covers the tasks involved for both the nurse and provider workflows and shows how they work together.

v5.6 KBM Workflow - Nephrology

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
KBM Version: 7.9

This course will teach you the Nephrology Nurse and Provider workflows of the new Advanced Template Set for KBM 7.9. This new tabbed template set features seven new templates with a unique user interface and a clinically relevant workflow. This course covers the tasks involved for both the nurse and provider workflows and shows how they work together.

v5.6 KBM Workflow - Neurology

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
KBM Version: 7.9

This course will walk you through the Nurse and Provider workflows for a Neurology office visit.

v5.6 KBM Workflow - Neurosurgery

Time: 90 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
KBM Version: 7.9

This course will walk you through the Nurse and Provider workflows for a Neurosurgery office visit.
v5.6 KBM Workflow - Obstetrics

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Obstetrics workflow for an initial prenatal office visit.

v5.6 KBM Workflow - Oncology

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Nurse and Provider workflows for an Oncology office visit.

v5.6 KBM Workflow - Ophthalmology

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you to navigate through a general ophthalmology workflow for both the technician and the provider.

v5.6 KBM Workflow - Ophthalmology ASC

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you the Nurse and Provider workflows for pre-operative, surgical, and post-operative procedures for cataract surgery.

v5.6 KBM Workflow - Ophthalmology Retina

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

This course will teach you the Nurse and Provider workflows for a Retina office visit.

v5.6 KBM Workflow - Orthopedics

Time: 90 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, Provider

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This course will walk you through the Nurse and Provider workflows for the Orthopedic specialty.

### v5.6 KBM Workflow - Pediatrics

<table>
<thead>
<tr>
<th>Time</th>
<th>90 minutes</th>
<th>Continuing Education: N/A</th>
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</thead>
<tbody>
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<td>Product</td>
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<td>Application Version: 5.6-5.6 SP1</td>
</tr>
<tr>
<td>Prerequisites</td>
<td>None</td>
<td>KBM Version: 7.9</td>
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</tbody>
</table>

This course will teach you the Pediatric Nurse and Provider workflows of the new Advanced Template Set for KBM 7.9. This new tabbed template set features seven new templates with a unique user interface and a clinically relevant workflow. This course covers the tasks involved for both the nurse and provider workflows and shows how they work together.

### v5.6 KBM Workflow - Physical Therapy

<table>
<thead>
<tr>
<th>Time</th>
<th>60 minutes</th>
<th>Continuing Education: N/A</th>
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<tbody>
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</tr>
<tr>
<td>Prerequisites</td>
<td>None</td>
<td>KBM Version: 7.9</td>
</tr>
</tbody>
</table>

In the NextGen Electronic Health Record (EHR) application, Knowledge Base Model (KBM) templates are available by specialty. This course will teach you how to use the physical therapy workflow for an initial therapy visit.

### v5.6 KBM Workflow - Pulmonary

<table>
<thead>
<tr>
<th>Time</th>
<th>90 minutes</th>
<th>Continuing Education: N/A</th>
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<tbody>
<tr>
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<td>Application Version: 5.6-5.6 SP1</td>
</tr>
<tr>
<td>Prerequisites</td>
<td>None</td>
<td>KBM Version: 7.9</td>
</tr>
</tbody>
</table>

In the NextGen Electronic Health Record (EHR) application, Knowledge Base Model (KBM) templates are available by specialty. This course will teach you how to use the nurse and provider Pulmonary workflow.

### v5.6 KBM Workflow - Rheumatology

<table>
<thead>
<tr>
<th>Time</th>
<th>90 minutes</th>
<th>Continuing Education: N/A</th>
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</thead>
<tbody>
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<td>Application Version: 5.6-5.6 SP1</td>
</tr>
<tr>
<td>Prerequisites</td>
<td>None</td>
<td>KBM Version: 7.9</td>
</tr>
</tbody>
</table>

This course will teach you to how to navigate through a rheumatology workflow for both the nurse and the provider.

### v5.6 KBM Workflow - Urgent Care

<table>
<thead>
<tr>
<th>Time</th>
<th>90 minutes</th>
<th>Continuing Education: N/A</th>
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<tbody>
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<td>Application Version: 5.6-5.6 SP1</td>
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<tr>
<td>Prerequisites</td>
<td>None</td>
<td>KBM Version: 7.9</td>
</tr>
</tbody>
</table>

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course will teach you the Urgent Care Nurse and Provider workflows of the new Advanced Template Set for KBM 7.9. This new tabbed template set features seven new templates with a unique user interface and a clinically relevant workflow. This course covers the tasks involved for both the nurse and provider workflows and shows how they work together.

**v5.6 KBM Workflow - Urology**

<table>
<thead>
<tr>
<th>Time:</th>
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<tbody>
<tr>
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<tr>
<td>Prerequisites:</td>
<td>None</td>
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<tr>
<td>Specialty Add-On For:</td>
<td>EHR CGT, Provider</td>
</tr>
</tbody>
</table>

| Continuing Education: | N/A                          |
| Application Version:  | 5.6-5.6 SP1                  |
| KBM Version:          | 7.9                          |

This course will teach you to how to navigate through a urology workflow for both the nurse and the provider.
v5.6 KBM Workflow - Behavioral Health Initial Psych Eval

Time: 60 minutes  Continuation Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will review the Initial Psych workflow using the Initial Psychiatric Evaluation and Psychopharm Progress Note templates.

v5.6 KBM Workflow - Behavioral Health Intake

Time: 60 minutes  Continuation Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will review the Intake workflow for Behavioral Health.

v5.6 KBM Workflow - Cardiology

Time: 60 minutes  Continuation Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Clinical Staff and Provider workflows for a Cardiology office visit.

v5.6 KBM Workflow - Correctional Health Management

Time: 60 minutes  Continuation Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will walk you through how to create and maintain complete health records to standardize healthcare throughout the Corrections environment while streamlining workflow.

v5.6 KBM Workflow - Dermatology

Time: 60 minutes  Continuation Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Clinical Staff and Provider workflows for a Dermatology office visit.
v5.6 KBM Workflow - ENT - Foundation Set

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the Clinical Staff and Provider workflows for an ENT office visit.

v5.6 KBM Workflow - Gastroenterology - Foundation Set

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to navigate through an internal gastroenterology practice workflow for both the clinical staff and the provider, using the Foundation Template Set.

v5.6 KBM Workflow - General Surgery

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Clinical Staff and Provider workflows for a General Surgery office visit.

v5.6 KBM Workflow - Gynecology - Foundation Set

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to navigate through a gynecology workflow for both the clinical staff and the provider, using the Foundation Template Set.

v5.6 KBM Workflow - Internal Medicine/Family Practice - Foundation Set

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to navigate through an Internal Medicine/Family Practice workflow for both the clinical staff and the provider, using the Foundation Template Set.
v5.6 KBM Workflow - Nephrology - Foundation Set

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider

This course will review the Nurse and Provider workflows for a Nephrology office visit.

v5.6 KBM Workflow - Neurology

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider

This course covers the Nurse and Provider workflows for a Neurology office visit.

v5.6 KBM Workflow - Neurosurgery

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider

This course will walk you through the Clinical Staff and Provider workflows for a Neurosurgery office visit.

v5.6 KBM Workflow - Obstetrics

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to navigate through an obstetrics workflow for both the clinical staff and the provider, seeing an initial prenatal patient.

v5.6 KBM Workflow - Oncology

Time: 75 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: No Education Plans

In this course you will have the opportunity to review the clinical staff and provider workflows for an Oncology office visit.
v5.6 KBM Workflow - Ophthalmology

Time: 90 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the Technician and Provider workflows for an Ophthalmology office visit.

v5.6 KBM Workflow - Ophthalmology ASC

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the workflow for a pre-op office and surgical visit.

v5.6 KBM Workflow - Ophthalmology Retina

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the Technician and Provider workflow for a Retina specialty office visit.

v5.6 KBM Workflow - Orthopedics

Time: 45 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the Clinical Staff and Provider workflows for an Orthopedic office visit.

v5.6 KBM Workflow - Pediatrics

Time: 60 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to navigate through a Pediatrics workflow for both the clinical staff and the provider.

v5.6 KBM Workflow - Physical Therapy

Time: 60 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.6 SP1
Prerequisites: None  KBM Version: 8.0
Specialty Add-On For: EHR CGT, Provider

This course will teach you how to document the workflow for a physical therapy evaluation and treatment.
<table>
<thead>
<tr>
<th>Course</th>
<th>Time</th>
<th>Continuing Education</th>
<th>Product</th>
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<td><strong>v5.6 KBM Workflow - Pulmonary</strong></td>
<td>60 minutes</td>
<td>N/A</td>
<td>EHR</td>
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<td>This course will teach you how to navigate through a Pulmonary workflow for both the clinical staff and the provider.</td>
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<tr>
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<td>60 minutes</td>
<td>N/A</td>
<td>EHR</td>
<td>5.6 SP1</td>
<td>None</td>
<td>EHR CGT, Provider</td>
<td>This course will teach you how to navigate through a Rheumatology workflow for both the clinical staff and the provider.</td>
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<tr>
<td><strong>v5.6 KBM Workflow - Urgent Care</strong></td>
<td>60 minutes</td>
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<td>EHR</td>
<td>5.6 SP1</td>
<td>None</td>
<td>EHR CGT, Provider</td>
<td>This course will teach you how to document the Nurse and Provider workflows for an Urgent Care office visit.</td>
</tr>
<tr>
<td><strong>v5.6 KBM Workflow - Urology</strong></td>
<td>60 minutes</td>
<td>N/A</td>
<td>EHR</td>
<td>5.6 SP1</td>
<td>None</td>
<td>EHR CGT, Provider</td>
<td>This course will teach you how to document the Clinical Staff and Provider workflows for a Urology office visit.</td>
</tr>
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</table>
NextGen Client Path to Stage 1 Meaningful Use 2014

**Time:** 45 minutes  
**Product:** Meaningful Use  
**Continuing Education:** CME  
**Prerequisites:** None  
**Application Version:** 5.6-5.8  
**Appears In:** No Education Plans

This course covers the steps that must be completed to demonstrate Stage 1 Meaningful Use (MU) with NextGen solutions.
NextPen 1.0 - Form Development

**Time:** 120 minutes  
**Product:** NextPen  
**Continuing Education:** N/A  
**Application Version:** 5.6 SP1  
**Prerequisites:** None  
**KBM Version:** 7.8  
**Appears In:** No Education Plans

Learn how to customize NextPen forms using Adobe Acrobat Professional. Review of set-up and configuration, installing shared objects and default NextPen form templates, designer form elements, setting bindings, form components and deploying forms.

NextPen 2.0 - Working with NextPen

**Time:** 45 minutes  
**Product:** NextPen  
**Continuing Education:** N/A  
**Application Version:** 2.0  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the features and functionality of both NextPen Print and NextPen Desktop applications.
v5.6 Optik - Advanced Features

Time: 45 minutes  
Product: Optik  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Optik - Overview, v5.6 Optik - Setup  
Appears In: No Education Plans  

This course will teach you to how to properly set up and operate Optik’s more advanced tools.

v5.6 Optik - Overview

Time: 30 minutes  
Product: Optik  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  
Appears In: No Education Plans  

This course covers the user interface and how to manage a customer transaction using Optik.

v5.6 Optik - Setup

Time: 40 minutes  
Product: Optik  
Continuing Education: N/A  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 System Master Files - Introduction, v5.6 Optik - Overview  
Appears In: No Education Plans  

This course will teach you the basics of the proper setup for the Optik application.
Index

A

Application Basics
  EHR
    Keyboard Shortcuts and Application Views: 12
    Navigating the Application Desktop: 12
  EPM
    Common Buttons Fields and Features: 48
    Navigating the Application Desktop: 49
Application Launcher: 11, 36
Appointments: 54
  Appointment Book
    Navigation: 37
    Setup: 38
  Appointment Waitlist
    Setup: 38
    Working with: 38
Follow-up
  Appointment Reminders: 36
  Overview: 36
  Recall Plans: 36, 37
  Worklog Tasks: 37
Printing Fee Tickets: 37 - See also Fee Tickets
Scheduling: 37
Scheduling Terms: 37
Audit Utility: 22 - See also Utilities
  Autoflow
    Checkin and Checkout (Check in / Check out): 38
    Checking Out Patients: 38

B

Background Business Processor (BBP)
  Introduction: 39
  Packages And Jobs: 39
  Setup: 39
Bad Debt
  Outsourcing: 40
  Process: 39
  Setup: 39
  Working with: 40
Billing: 54 - See also Claims: Billing
  Advanced
    Encounter Rate Billing: 34
    Split Billing: 34
Billing and Collections
  Managing: 40
  Process: 40
Budget Plans
  Process: 40
  Setup: 40
  Working with: 41

C

Case Management
  EHR: 11
  EPM: 41
Charges: 41
Claims
  Billing - See also Billing
    Dental: 43
    DME: 43
    Employer and Company Accounts: 43
    Encounters: 43
    Provider Based: 44
    Supervisor: 45
    UB: 45
    Workers Compensation: 45
    CLIA Numbers: 42
    CMS 1500 Claims: 44
    Electronic Secondary Claims: 44
    Mammography Numbers: 43

E

EHR Encounters: 15
Electronic Dental Records (EDR)
  Front Desk: 9
  Getting Started: 9
  Periodontal Charting: 9
  Reports: 9
  Setup: 9
  Tooth Charting: 10
  Working with Patients: 10
Electronic Remittance Advice (ERA)
  Processing: 50
  Setup: 49
Encounters
  Basics: 15
  Checking In Patients and Creating Encounters: 48
  Create Encounter and Encounter Maintenance Windows: 48
  Custom and Addendum: 15
  Customizing the View: 15
  Main Toolbar - History Toolbar: 15
  Overview: 48
Encounter Workflow: 14
Enterprise
  Preferences: 18, 48
  System Master Files: 67, 26
ePrescribing (eRx)
  Setup: 18
  Working with: 19

F

Family Unit and Alias: 13, 16
Fax Integration Services
  Installing: 19
  Setup: 19
Fee Tickets: 46 - See also Appointments: Printing Fee Tickets
  Processing: 44
  Rebilling Encounters and Regenerating Claims: 44
Code Tables: 45
Community Health Center (CHC)
  Encounter Rate Billing: 41
  Encounter Tracking: 41
  Government Payer: 42
  Health Center Reports: 42
  Overview: 42
  Sliding Fees: 42
Document Utility: 45
CoverPage Editor: 11 - See also Utilities
Credit Card Processing: 46
  Adding/Deleting/Voiding Payments: 46

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Index

File Maintenance: 33, 71, 22, 55
Foundation Set
  ENT: 85
  Family Practice: 85
  Gastroenterology (GI): 85
  Gynecology (GYN): 85
  Internal Medicine: 85
  Nephrology: 86
  Pediatrics: 87

Graphing: 19
Guarantor Accounts: 50

Image Control System (ICS)
  Getting Started: 73
  Setup
    Attaching an EOB Scan: 73
    File Maintenance: 73
    Remote Scanning: 73
    Security and Administration: 74
    System Administrator: 74
  Usage
    Attaching an EOB: 73
    Reports: 74
    Scanning and Batches: 74
    Searching: 74
    Viewer Tools: 74
    Workflow and PAQ Integration: 75

Insurance
  Adding an Authorization: 50
  Adding an Employer: 50
  Adding to a Person: 50

Introduction
  EPM: 51

Knowledge Base Model (KBM)
  Templates
    Assessment: 76
    Document Library: 76
    Family History: 76
    HPI: 76
    Immunizations: 76
    Order Administration: 77
    Order Management: 77
    Past Medical History: 77
    Physical Exam: 77
    Problem List: 77
    Procedures: 77
    Protocols: 77
    Review of Systems: 78
    Social History: 78

Workflows
  Behavioral Health Initial Psych Eval: 78, 84
  Behavioral Health Intake: 78, 84
  Cardiology: 78, 84
  Correctional Health Management: 79, 84
  Dermatology: 79, 84
  ENT: 79, 85
  Family Practice: 80
  Gastroenterology (GI): 79, 85
  General Surgery: 79, 85
  Gynecology (GYN): 80, 85
  Internal Medicine: 80, 85
  Nephrology: 80, 86
  Neurology: 80, 86
  Neurosurgery: 80, 86
  Obstetrics (OB): 81, 86
  Oncology: 81, 86
  Ophthalmology: 81, 87
  Ophthalmology ASC: 81, 87
  Ophthalmology Retina: 81, 87
  Orthopedics: 81, 87
  Pediatrics: 82, 87
  Physical Therapy: 82, 87
  Pulmonary: 82, 88
  Rheumatology: 82, 88
  Urgent Care: 82, 88
  Urology: 83, 88

Labs
  XML Lab Solution: 22

Libraries
  Anesthesia Modifiers: 51
  Claim Edits: 51
  Claim Printing: 51
  Contracts: 51
  Diagnosis Codes: 20, 52
  GPCI Codes: 52
  Places of Service: 52
  Reason Codes: 52
  Relative Value Unit (RVU): 52

Service Item
  Exceptions: 52
  Global Updates: 53
  Groups: 53
  Overview: 20, 53
  Submitter Profiles: 53
  Tax Rate: 53
  Types of Service: 53

License Manager: 20, 54
Locations: 11, 46

NextPen: 90
  Note File Monitor: 22 - See also Utilities

Offline Document Processor: 22 - See also Utilities

Optik
  Advanced Features: 91
  Overview: 91
  Setup: 91

Orders Module
  Ordering Tests: 15
  Setup: 16
  Test Results: 16

Organizational Levels: 12, 48

Overview
  Appointment Setup: 54
  Billing Setup: 54
  Charges and Contracts Setup: 55

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Index

Collection Setup: 55
EHR: 11
EPM: 35
EPM and EHR: 19, 50
Setup: 25, 65
File Maintenance: 55, 22
Payers System Master File: 55, 23
Payment Posting Setup: 55
Providers System Master File: 56, 23
System Security: 56

P
Patient Demographics Module: 13
Patient Education Module: 13
Periodontal Charting: 9
Practice Master File
Groups: 56
Letters: 56
Marketing Plans: 56
Patient Statuses: 57
Report Types: 57
Practice Preferences
Alerts: 57
Appointment Scheduling: 57
Budget Accounts: 57
Charge Entry: 57
Chart: 58
Claims: 58
Contract Edits: 58
Data and Fee Tickets: 58
EHR: 58
Encounters: 58
External: 59
Forms: 59
General: 59
Holidays: 59
Introduction: 59
Invoices: 60
Itemized Bills: 60
Libraries: 60
Medication: 60
Order Module: 60
Patient Pay: 60
Payment Processing: 61
Printing: 61
Provider: 61
Reports: 61
Sliding Fee: 61
Statements: 61
Tasks: 62
Tran Codes: 62
Transactions: 62
Provider Approval Queue (PAQ)
End User: 23
Setup: 23

R
Real Time File Monitor (RTF) - See also Document Monitor, See also Utilities
Realtime Transaction Server (RTS)
Setup: 62
Use: 62
Region Editor: 23
Reports
Accounts Receivable (AR): 63
Daily: 63
EHR: 16
EPM: 62, 63
General: 63
Monthly: 63
Scheduling: 64
Rosetta Holding Tank: 23

S
Security: 56
Password Requirements: 24, 64
Patient Privacy: 13
Patient Sharing: 24, 64
Rights and Permissions: 24, 65
User Groups: 24, 64
Users: 24, 64
SetDB: 25, 65
SIG Codes: 12 - See also System Master File
Significant Events: 33, 71, 75
SIGs - See SIG Codes
Statements
Generating
Batch: 65
Individual Statement on Demand: 65
Setup
Payer Specific Dunning Messages: 66
Statement Process: 66
System Master File - See also SIG Codes
Allergies and Allergy Reactions: 25
Collection Agencies: 66
Counters: 25, 66
CPT4 Codes: 25, 66
DB Picklist Manager: 25
Diagnosis Codes: 26, 66
DME Regions: 67
Employers: 26, 67
Enterprises: 67, 26
Equipment Field Map: 26
External Interface Map: 26
External System Setup: 27
Form and Label Templates: 67
Formats: 67
ICD9CM: 27, 67
Introduction: 27, 68
Label Products: 68
Locations: 27, 68
Medication Codes: 27
Medications: 27
Medications By Practice: 27
Modifiers: 28
Order
AOE Questions and Answers: 28
Results Sequences and Notifications: 28
Test Compendium and Favorites: 28
Tests and Components: 29
XML Categories: 29
Patient Responsibility: 68
Payers: 68
Overview: 55, 23
Pharmacies: 29
Practices: 69, 28
Printer Aliases: 29
Providers: 69
Overview: 29, 56, 23
Revenue Codes: 69
Rx Units: 30
Service Categories: 30
SIGs: 30
Sliding Fee Schedules: 69
Specialties: 30, 69
Task Types: 70
Taxonomy Codes: 70
Transaction Codes: 70
User Image Descriptions: 30
User Note Descriptions: 70
Vaccine Orders: 31
View Categories: 31
Zip Codes: 31, 70
Index

T

Template Editor
   Adding Fields: 31
   Basic Triggers: 31
   Menu Bar and Toolbars: 32
   Tools Menu: 32
   Working with Templates: 32
Template Import / Export: 32 - See also Utilities
Tooth Charting: 10

Transactions
   5010 837 Electronic Claim: 71
   Advanced Transactions
      Account Level: 34
      Credits Setup: 34
      Entering Insurance: 34
      Line Item Credits: 35
      Overview of Credits: 34
      Refunds: 35
      Unapplied Credits: 35
Payment Processing
   Overview: 71
   Setup: 71
   Using Reason Codes: 35

U

Universal Preferences: 32
User Preferences
   EHR
      Documents: 16
      Formulary: 17
      General: 17
      Main Toolbar: 17
      Medical Records: 17
      Medications: 17
      Templates: 18
   EPM
      Administration: 49
      General: 49
      Scheduling: 49
Utilities
   Audit: 22
   Contract: 45
   CoverPage Editor: 11
   Document Monitor: 12
   Import / Export
      Document Builder: 14
      Template: 32
   Note File Monitor: 22
   Offline Document Processor: 22

W

Workflow Module
   Appointments: 18
   Inbox: 18
   Tasks: 18
Worklog Manager
   Administration: 71
   Introduction: 72
   Task Reports: 72
   Using: 72

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