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Overview

This guide is designed to provide a brief description of the current eLearning courses offered by the NextGen Learning Center, which includes some version 5.7 and 5.8 courses. 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), Practice Management (PM) [formerly 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

Core Education Plans

System Configuration Training (SCT) >> 10 Hours
An introduction to Practice Management and Electronic Health Records setup. Select this education plan if you will be bringing up PM and EHR at the same time.

PM Core Group Training (CGT) >> 25 Hours
Learn the basics of the Practice Management application's features once it has been set up.

EHR Core Group Training (CGT) >> 19 Hours + Specialty KBM
Learn the basics of the Electronic Health Records application's features once it has been set up.

Specialty KBM >> Time Varies
Learn to use the Knowledge Base Model templates and specialty workflows that are applicable to your practice.

PM-Only Education Plans

System Configuration Training (PM Only) >> 41 Hours
An overview of the various components of system setup for Practice Management.

Biller >> 19 Hours
Learn only tasks related to billing (contains some System Configuration Training and Core Group Training courses).

EPM End User >> 24 Hours
Learn a broad range of specific application tasks for the Practice Management application (contains some System Configuration Training and Core Group Training courses).

Front Desk >> 14 Hours
Learn basic and advanced appointment scheduling, plus how to work with charge and payment entry (contains some System Configuration Training and Core Group Training courses).

Scheduler >> 10 Hours
Learn only basic and advanced tasks related to scheduling (contains some System Configuration Training and Core Group Training courses).

Small Practice Initial Training - EPM >> 7 Hours
This set of courses is designed to introduce all users in a small practice environment to the basics of the PM application.

PM System Configuration Training (SCT) for Small Practices >> 20 Hours
An education plan designed for small practice clients who want to learn to setup of the Practice Management application.
PM Core Group Training (CGT) for Small Practices >> 13 Hours
An education plan designed for small practice clients who want to learn to use the Practice Management application once it is setup.

Enterprise Appointment Scheduling (EAS) >> 20 Hours
An education plan designed for clients who have only purchased the scheduling portion of Practice Management (EAS) and want to learn those features.

EHR-Only Education Plans

EHR Definition Workshop (DWS) >> 20 Hours
An overview of the various components of system setup for Electronic Health Records.

EHR End User >> 11 Hours
Learn a broad range of specific application tasks for the Electronic Health Records application (contains some System Configuration Training and Core Group Training courses).

Provider >> 5 Hours + Specialty KBM
Learn a broad range of specific, provider-related application tasks for the Electronic Health Records application. *This education plan should be paired with Knowledge Base Module (KBM) course(s) for the provider’s specialty.*

Small Practice Initial Training - EHR >> 4 Hours
This set of courses is designed to introduce all users in a small practice environment to the EHR application.

EHR for Small Practices >> 16 Hours
An education plan designed for small practice clients who want to learn to setup and use Electronic Health Records.

EDR Education Plans

Software Administrators >> 4 Hours
Contains all of the courses for Electronic Dental Record, and describes the setup tools available only to the Administrators.

Super Users >> 3.5 Hours
Contains courses pertaining to all aspects of the software to give an over-arching perspective and understanding of the tool.

Office Management >> 2 Hours
Learn the tools used behind the scenes within the practice, including reporting and scheduling.

Clinical Staff >> 2 Hours
This education plan explores the patient and chart tools, including searching, notes and both traditional and periodontal tooth charting.
5.8 Background Business Processor - Copying Packages, Jobs, and Schedules

Time: 35 minutes  
Continuing Education: N/A  
Product: BBP  
Application Version: 5.8  
Prerequisites: 5.8 Background Business Processor - Introduction; 5.8 Background Business Processor - Packages, Jobs, and Schedules  
Appears In: No Education Plans  

This course covers how to copy packages, jobs, and schedules in order to create new ones easily.

5.8 Background Business Processor - Overview

Time: 45 minutes  
Continuing Education: N/A  
Product: BBP  
Application Version: 5.8 UD1  
Prerequisites: None  
Appears In: No Education Plans  

This course will cover the basics of the Background Business Manager application.

5.8 Background Business Processor - Packages, Jobs, and Schedules

Time: 45 minutes  
Continuing Education: N/A  
Product: BBP  
Application Version: 5.8  
Prerequisites: 5.8 Background Business Processor - Introduction  
Appears In: No Education Plans  

This course covers how to create packages, jobs, and schedules in the Background Business Processor application.

5.8 Background Business Processor - Setup

Time: 40 minutes  
Continuing Education: N/A  
Product: BBP  
Application Version: 5.8  
Prerequisites: 5.8 Background Business Processor - Introduction  
Appears In: No Education Plans  

This course will cover how to set up the Background Business Processor.
### Dashboard 3.0 - EHR

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

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

### Dashboard 3.0 - EPM

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

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

### Dashboard 3.0 - Overview

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

This course covers the basics of the Dashboard application.

### Dashboard 3.0 - Setup

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

This course covers how to set up the Dashboard application.
## 5.8 Document Management - Attaching an EOB Scan

**Time:** 60 minutes  
**Product:** Document Management  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up NextGen Document Management specifically for EOB (Explanation Of Benefits) scans and attach them to their appropriate NextGen PM encounters.

## 5.8 Document Management - Getting Started

**Time:** 40 minutes  
**Product:** Document Management  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the basic information required to get started with the Document Management application.

## 5.8 Document Management Setup - File Maintenance

**Time:** 60 minutes  
**Product:** Document Management  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to use the NextGen File Maintenance application to set up the Document Management application.

## 5.8 Document Management Setup - Remote Scanning

**Time:** 30 minutes  
**Product:** Document Management  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up NextGen Document Management to provide the ability to scan, file, and view images from a remote location.

## 5.8 Document Management Setup - Security

**Time:** 20 minutes  
**Product:** Document Management  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up the various options available for securing the Document Management application.
5.8 Document Management Setup - System Administrator

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

This course covers how to set up security rights and permissions for NextGen Document Management within the System Administrator application.

5.8 Document Management Usage - Barcode Scanning

Time: 25 minutes  
Product: Document Management  
Prerequisites: None  
Appears In: No Education Plans

This course will teach you how to setup and use the barcode scanning feature in the Document Management application.

5.8 Document Management Usage - Reports

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

This course covers how to use the Document Management Reports to run Document Management-specific reports.

5.8 Document Management Usage - Scanning and Batches

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

This course covers how to acquire and save images in Document Management. Also, you will learn how to work with batches.

5.8 Document Management Usage - Searching and Search Results

Time: 20 minutes  
Product: Document Management  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to search for documents/images using the Image Lookup window and use the advanced search features of Document Management.
5.8 Document Management Usage - Viewer Tools

**Time:** 25 minutes  
**Product:** Document Management  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the options available on the image viewer toolbar and annotation toolbar. You’ll also learn to set up the image viewer options in User Preferences and use them on the documents opened in the image viewer.

5.8 Document Management Usage - Workflow and PAQ Integration

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

This course covers how the Document Management application works with the Workflow and PAQ (Provider Approval Queue) modules in EHR.
Electronic Dental Record (EDR)

**EDR - Front Desk Administration**

- **Time:** 30 minutes
- **Product:** EDR as packaged with EPM
- **Prerequisites:** 4.1 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:** 4.1 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:** 4.1 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:** 4.1 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  
**Continuing Education:** N/A  
**Product:** EDR as packaged with EPM  
**Application Version:** 4.1-4.3  
**Prerequisites:** 4.1 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  
**Continuing Education:** N/A  
**Product:** EDR as packaged with EPM  
**Application Version:** 4.1-4.3  
**Prerequisites:** 4.1 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 patient files.
Electronic Health Records (EHR)

5.8 Clinical Reconciliation

Time: 45 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to use Clinical Reconciliation to reconcile information received in Continuity of Care Documents (CCDs).

5.8 Document Builder - Basic Macros

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.8
Prerequisites: None
Appears In: EHR CGT

This course covers the basics of creating macros in the TxText Document Builder application. Topics include creating Standard, Summary, and File Maintenance macros.

5.8 Document Builder - Import Export Wizard

Time: 15 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.8
Prerequisites: None
Appears In: EHR CGT

This course covers how to import and export documents between NextGen databases using the Import/Export Wizard in Document Builder TxText.

5.8 Document Builder - Overview

Time: 30 minutes  Continuing Education: N/A
Product: EHR  Application Version: 5.8
Prerequisites: None
Appears In: EHR CGT

This course covers the basics of the TxText Document Builder application. Topics include Accessing the Document Builder, Components and List View windows, Preferences, and Properties.

5.8 Document Builder - Setup

Time: 30 minutes  Continuing Education: N/A
Product: EHR, System Administrator  Application Version: 5.8
Prerequisites: None
Appears In: EHR CGT

This course covers the setup requirements needed in order to properly use the Document Builder TxText application.
5.8 Document Builder - Working with the Document Builder

Time: 45 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT

This course covers how to create a document in the TxText Document Builder. Topics include creating a new document, Page Setup, Document Format, Inserting Macros, Inserting Components.

5.8 EHR Application - Basics and Security

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, DWS (EHR Only), EHR CGT, EHR End User, Provider

In the EHR Application Basics and Security course, you will learn the most efficient ways to navigate the EHR application desktop. In addition, you will learn how to effectively secure patients’ privacy in EHR.

5.7 EHR Encounter Workflow

Time: 45 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers the basic functionality regarding capturing Encounter Workflows in the NextGen EHR (Electronic Health Records) application.

5.7 EHR Encounter Workflow - Procedure

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers the basic functionality regarding capturing Procedure encounters in the NextGen EHR (Electronic Health Records) application.

5.7 EHR Encounter Workflow - Telephone

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers basic functionality regarding capturing telephone encounters in the NextGen EHR (Electronic Health Records) application.
5.7 EHR Encounters - Basics

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to create, lock, unlock, and delete an encounter, as well as how to view the encounter properties.

5.7 EHR Encounters - Custom and Addendum

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to create a custom encounter and make an addendum to an existing one.

5.7 EHR Encounters - Customizing the View

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers how to customize the view of the History Toolbar.

5.8 EHR - Main Toolbar/History Toolbar

Time: 15 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers the components and functions of the EHR Main Toolbar, also known as the History Toolbar.

5.8 EHR - Navigating the Application Desktop

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, DWS (EHR Only), EHR CGT, EHR End User, Provider

This course covers the components of the desktop and how to navigate through the EHR.

5.8 EHR - Overview of ICD-10 Changes in the EHR

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: No Education Plans

This course covers the changes made to the NextGen Ambulatory EHR to accommodate ICD-10.
5.8 EHR Enhancements Overview
Time: 30 minutes  Continuing Education: N/A  
Product: EHR  Application Version: 5.8  
Prerequisites: None  
Appears In: No Education Plans  
This course provides an overview of the 5.8 enhancements for the Electronic Health Record (EHR) application.

5.8 EHR Modules - Images
Time: 60 minutes  Continuing Education: CME  
Product: EHR  Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider  
This course covers how to work with a medical image in the EHR Images Module.

5.8 EHR Modules - Medication Allergies
Time: 30 minutes  Continuing Education: CME  
Product: EHR  Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider  
This course covers how to use the EHR Medication Allergies Module to add, view, update, and review Medication Allergies in the patient’s medical record.

5.8 EHR Modules - Medications
Time: 60 minutes  Continuing Education: CME  
Product: EHR  Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider  
This course covers how to work with the Medications module in the Electronic Health Records (EHR) application.

5.8 EHR Modules - Problems
Time: 30 minutes  Continuing Education: N/A  
Product: EHR  Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider  
This course covers how to work with the Problems (Diagnosis) module in the Electronic Health Records (EHR) application.

5.8 EHR Modules - Procedures
Time: 15 minutes  Continuing Education: CME  
Product: EHR  Application Version: 5.8  
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.

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
5.8 EHR User Preferences - Documents

Time: 10 minutes
Product: EHR
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers how to set up the Documents tab EHR User preferences.

5.8 EHR User Preferences - Formulary

Time: 10 minutes
Product: EHR
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers how to set up the Formulary tab EHR User preferences.

5.8 EHR User Preferences - General

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

This course covers how to set up user-specific preference settings on the General tab in NextGen EHR.

5.8 EHR User Preferences - Main Toolbar

Time: 10 minutes
Product: EHR
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers how to set up the Main Toolbar tab preferences in EHR.

5.8 EHR User Preferences - Medical Records

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

This course covers how to set up the Medical Records tab preferences in EHR.

5.8 EHR User Preferences - Medications

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

This course covers how to set up user-specific preference settings on the Medications tab in Preferences in the NextGen EHR application.
5.8 EHR User Preferences - Reference

**Time:** 10 minutes  
**Product:** EHR  
**Prerequisites:** None  
**Appears In:** EHR CGT, EHR End user

This course covers how to set up the Reference tab preferences in EHR.

5.8 EHR User Preferences - Templates

**Time:** 10 minutes  
**Product:** EHR  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk

This course covers how to set up the Templates tab preferences in EHR.

5.8 EHR Workflow Module - Appointments

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

This course covers how to access the EHR Work Flow Module. It will also teach you how to view and update appointments, as well as access the patient's medical record from an appointment in the Work Flow Module.

5.8 EHR Workflow Module - Inbox

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

This course covers how to access the EHR Work Flow Module and how to set up your email to function within the Work Flow Module - Inbox. It will also teach you how to send and manage email messages from the Inbox.

5.8 EHR Workflow Module - Tasks

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

This course covers how to access the EHR Work Flow Module. It will also teach you how to view, add, and update Tasks, as well as access the patient's medical record from a Task in the Work Flow Module.
### 5.8 ePrescribing - Working With eRx

**Time:** 30 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.8  
**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.

### 5.8 Introduction to NextGen EHR

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only), EHR CGT, EHR End User, Provider

This course covers how NextGen EHR can be used to navigate through an encounter. It will provide you with an overview of a sample medical office visit including the clinical staff, provider, and checkout workflows typically performed during a patient visit.

### 5.7 Medical Records Module - Documents

**Time:** 15 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** EHR CGT, EHR End User, Provider

This course covers how to work with the Documents module of the Medical Records module in the Electronic Health Records (EHR) application.

### 5.7 Medical Records Module - Templates

**Time:** 15 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** EHR CGT, EHR End User, Provider

This course covers how to work with the Templates module of the Medical Records module in the Electronic Health Records (EHR) application.

### 5.8 Medical Summary Utility

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the setup and use of the Medical Summary Utility.
5.8 Orders Module - Immunizations

Time: 30 minutes  
Continuing Education: N/A
Product: EHR  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to manage immunization records and orders for a patient in the Orders module.

5.8 Orders Module - Ordering Tests

Time: 45 minutes  
Continuing Education: CME
Product: EHR  
Application Version: 5.8
Prerequisites: 5.8 Orders Module - Setup
Appears In: No Education Plans

This course covers how to order lab or radiology tests in the Orders module.

5.8 Orders Module - Orders Management Control

Time: 25 minutes  
Continuing Education: N/A
Product: EHR  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to create an Orders Management Control practice template to manage the recurring and future orders for all patients at the practice level.

5.8 Orders Module - Setup

Time: 20 minutes  
Continuing Education: N/A
Product: EHR, File Maintenance, System Administrator  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up items for the Orders module in System Administrator, the EHR, and File Maintenance.

5.8 Orders Module - Submitting Charges

Time: 30 minutes  
Continuing Education: N/A
Product: EHR  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up the submitting charges options and submit charges when ordering a test in the Orders module.

5.8 Orders Module - Working with Test Results

Time: 60 minutes  
Continuing Education: CME
Product: EHR  
Application Version: 5.8
Prerequisites: 5.8 Orders Module - Setup, 5.8 Orders Module - Ordering Tests
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 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.

5.8 Patient Demographics Module

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End user

This course covers how to access, add, and update a patient’s demographic and insurance coverage information while working in the EHR application.

5.8 Patient Education Module

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End user

This course covers how use the Patient Education Module in NextGen EHR.

5.8 Patient Education Setup

Time: 20 minutes  
Continuing Education: N/A  
Product: EHR, File Maintenance, System Administrator  
Application Version: 5.8  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up and install the Healthwise Patient Education Module.

5.8 Provider Approval Queue - End User

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT, EHR End User, Provider

This course covers the steps necessary for a provider to sign off on lab results, documents, and images.

5.8 Provider Approval Queue - Setup

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.8  
Prerequisites: None  
Appears In: EHR CGT

This course covers the steps necessary to set up the PAQ for end users in the System Administrator.
5.8 Template Editor - Adding Fields to a Template

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

This course covers how to add fields to a template and set up properties for the fields.

5.8 Template Editor - Basic Triggers Part One

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

This course covers how to set up some of the basic triggers used in NextGen templates.

5.8 Template Editor - Basic Triggers Part Two

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

This course covers how to set up additional basic triggers used in NextGen templates.

5.8 Template Editor - Menu Bar and Toolbars

Time: 15 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

This course covers the function and operation of each of the menu options and toolbar buttons in the Template Editor module, as well as the information displayed on the status bar.

5.8 Template Editor - Tools Menu

Time: 45 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

This course covers how to view and clear the Template Edit Log, update Template Links, set up Template Sets and User Preferences, use the Auto Check Triggers option, and create cache for all templates.

5.8 Template Editor - Working with Templates

Time: 45 minutes  
Product: EHR  
Prerequisites: None  
Appears In: EHR CGT

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to create and work with templates.

**5.7 Template Import/Export Utility**

<table>
<thead>
<tr>
<th>Time: 30 minutes</th>
<th>Continuing Education: N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product: EHR</td>
<td>Application Version: 5.7</td>
</tr>
</tbody>
</table>

**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.

**5.8 UD1 EHR Enhancements Overview**

<table>
<thead>
<tr>
<th>Time: 30 minutes</th>
<th>Continuing Education: N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product: EHR</td>
<td>Application Version: 5.8 UD1</td>
</tr>
</tbody>
</table>

**Prerequisites:** None

**Appears In:** No Education Plans

This course covers the EHR enhancements made in NextGen version 5.8 UD1.
## File Maintenance

### 5.8 Advanced SIM Library Mode

| Time: 20 minutes | Continuing Education: N/A |
| Product: EPM, File Maintenance | Application Version: 5.8 |
| Prerequisites: None |
| Appears In: No Education Plans |

This course covers how the Advanced SIM Library Mode can be used in your practices to set prices based on geographical regions and/or charge patients an alternate price based on their Location and Payer combination.

### 5.8 Code Tables

| Time: 15 minutes | Continuing Education: N/A |
| Product: File Maintenance | Application Version: 5.8 |
| Prerequisites: 5.8 Overview of File Maintenance |
| Appears In: SCT, SCT (EPM Only) |

This course covers the Code Tables that are used in the NextGen EPM and EHR applications.

### 5.8 Creating a Fee Ticket

| Time: 30 minutes | Continuing Education: N/A |
| Product: File Maintenance | Application Version: 5.8 |
| Prerequisites: None |
| Appears In: SCT, SCT (EPM Only) |

This course covers how to create the fee ticket body and import it into the EPM.

### 5.8 Determining and Assigning Organizational Levels

| Time: 30 minutes | Continuing Education: N/A |
| Product: File Maintenance | Application Version: 5.8 |
| Prerequisites: None |
| Appears In: SCT, SCT (EPM Only), DWS (EHR Only) |

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

### 5.8 Enterprise Preferences

| Time: 45 minutes | Continuing Education: N/A |
| Product: EPM | Application Version: 5.8 |
| Prerequisites: None |
| Appears In: SCT, SCT (EPM Only) |

This course covers the settings found in the Enterprise Preferences System Master File.

### 5.8 Libraries - Claim Edits

| Time: 30 minutes | Continuing Education: N/A |
| Product: EPM, File Maintenance | Application Version: 5.8 |
| Prerequisites: None |
| Appears In: SCT, SCT (EPM Only) |

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to set up procedures to check your encounter information for errors and omissions before billing them out electronically.

### 5.8 Libraries - Claim Modifiers

- **Time:** 60 minutes
- **Continuing Education:** N/A
- **Product:** EPM, File Maintenance
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to set up a Claim Modifiers Library in File Maintenance.

### 5.8 Libraries - Claim Printing

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** File Maintenance
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to set up options to create paper claims that contain the information needed for proper processing and payment.

### 5.7 Libraries - Contracts

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM, File Maintenance
- **Application Version:** 5.7
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only)

This course will teach you how to set up your payer contracts as well as how to make them active for your payer(s).

### 5.8 Libraries - Diagnosis Codes

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** File Maintenance
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** SCT, DWS (EPM Only)

This course covers how to set up Diagnosis Codes Library in File Maintenance.

### 5.7 Libraries - GPCI Codes

- **Time:** 30 minutes
- **Continuing Education:** N/A
- **Product:** EPM, File Maintenance
- **Application Version:** 5.7
- **Prerequisites:** 5.7 Overview of File Maintenance
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to set up a GPCI Codes Library and how it is used.
5.7 Libraries - NDC

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** 5.7 Overview of File Maintenance  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to create Certificates of Medical Necessity (CMN) forms and how to attach a CMN form to a patient’s encounter.

5.7 Libraries - Places of Service

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up the Places of Service Library in the File Maintenance application, to meet your organization needs of payer-required places of service codes for claim submission.

5.7 Libraries - Reason Codes

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** 5.7 Overview of File Maintenance, 5.7 System Master File - Transaction Codes  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up Reason Codes Libraries.

5.7 Libraries - RVU

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** 5.7 Overview of File Maintenance  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to create an RVU library, populate it, and learn how it is used.

5.8 Libraries - Service Items

**Time:** 60 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to work with the Service Items Library in order to set up your fee schedules for charge entry and the ordering of diagnostic services.
5.7 Libraries - SIM Pricing Regions

**Time:** 10 minutes
**Product:** EPM, File Maintenance
**Continuing Education:** N/A
**Application Version:** 5.7
**Prerequisites:** None
**Appears In:** SCT, SCT (EPM Only)

This course covers how SIM Pricing Regions libraries are used in conjunction with the Advanced SIM Library functionality.

5.8 Libraries - SIM Pricing Template

**Time:** 20 minutes
**Product:** EPM
**Continuing Education:** N/A
**Application Version:** 5.8
**Prerequisites:** None
**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up a SIM Pricing Template, add a SIM Library Configuration, and launch a SIM Library update.

5.7 Libraries - Submitter Profiles

**Time:** 40 minutes
**Product:** EPM
**Continuing Education:** N/A
**Application Version:** 5.7
**Prerequisites:** v5.6 System Master Files - Introduction
**Appears In:** SCT, SCT (EPM only)

This course will teach you how to setup your Submitter Profiles for the submission of electronic claims to a clearinghouse or payer.

5.7 Libraries - Tax Exemption

**Time:** 30 minutes
**Product:** EPM, File Maintenance
**Continuing Education:** N/A
**Application Version:** 5.7
**Prerequisites:** v5.6 Using File Maintenance, 5.7 Libraries - Tax Rate
**Appears In:** SCT, SCT (EPM Only)

This course covers how to create a Tax Exemption Library and how it is used in the EPM application.

5.7 Libraries - Tax Rate

**Time:** 25 minutes
**Product:** EPM
**Continuing Education:** N/A
**Application Version:** 5.7
**Prerequisites:** 5.7 Using File Maintenance
**Appears In:** SCT, SCT (EPM Only)

This course covers how to create a tax library that will be used to create sales tax line items.

5.7 Libraries - Types of Service

**Time:** 30 minutes
**Product:** EPM, File Maintenance
**Continuing Education:** N/A
**Application Version:** 5.7
**Prerequisites:** None
**Appears In:** SCT, SCT (EPM Only)

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to set up Types of Service Library in File Maintenance.

5.8 Master Lists

**Time:** 30 minutes  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only)

This course covers Master Lists and how their items are shared across the Enterprise.

5.7 Master Lists - Financial Classes

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** 5.7 Overview of File Maintenance  
**Appears In:** SCT, SCT (EPM Only), EAS

This course covers how to create financial classes that will be used to categorize payers for reporting purposes.

5.8 Overview of File Maintenance

**Time:** 45 minutes  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to access and configure your NextGen’s database tables.

5.7 Practice Master Files - Groups

**Time:** 30 minutes  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up the Groups practice-level master file for provider group numbers in File Maintenance.

5.7 Practice Master Files - Letters

**Time:** 30 minutes  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up the Practice Master File of Letters in the File Maintenance application.

5.7 Practice Master Files - Marketing Plans

**Time:** 15 minutes  
**Product:** EPM  
**Application Version:** 5.7  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only)

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course will teach you about the Practice Master File - Marketing Plans and how to create one.

### 5.7 Practice Master Files - Patient Statuses

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

This course covers how to create Patient Statuses, Patient Status Change Reasons, and how to set up the options in the Practice Preferences window to designate a status to the patient’s record.

### 5.7 Practice Master Files - Report Types

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to use the Report Types Practice Master File to create Report Types that are used to categorize and group Memorized Reports in the NextGen Enterprise Practice Management (EPM) application.

### 5.7 Practice Preferences - Alerts

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Prerequisites:** 5.7 Practice Preferences - Introduction  
**Appears In:** SCT, SCT (EPM Only), EAS

This course will teach covers the option settings of the ‘Alerts’ Practice Preferences.

### 5.7 Practice Preferences - Appointment Scheduling

**Time:** 10 minutes  
**Product:** EPM  
**Prerequisites:** 5.7 Practice Preferences - Introduction  
**Appears In:** SCT, SCT (EPM Only), EAS

This course covers the options and fields in Practice Preferences - Appointment Scheduling.

### 5.7 Practice Preferences - Budget Accounts

**Time:** 10 minutes  
**Product:** EPM, File Maintenance  
**Prerequisites:** 5.7 Practice Preferences - Introduction  
**Appears In:** SCT, SCT (EPM Only)

This course covers the Practice Preferences that you can set up for Budget Accounts.
### 5.7 Practice Preferences - Charge Entry

- **Time:** 30 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to set the preferences on the Charge Entry window of Practice Preferences.

### 5.7 Practice Preferences - Chart

- **Time:** 25 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only), EAS

This course covers the Chart Practice Preferences window.

### 5.7 Practice Preferences - Claims

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to set up the preferences for processing claims on the Claims Practice Preferences window.

### 5.7 Practice Preferences - Contract Edits

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only)

This course covers how to activate contract edits and alerts from the Contract Edits Practice Preferences window.

### 5.7 Practice Preferences - Data and Fee Tickets

- **Time:** 15 minutes
- **Product:** EPM, File Maintenance
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only)

This course covers the Data and Fee Tickets window in Practice Preferences.

### 5.7 Practice Preferences - EHR

- **Time:** 20 minutes
- **Product:** EPM
- **Prerequisites:** 5.7 Practice Preferences - Introduction
- **Appears In:** SCT, SCT (EPM Only)

This course provides an overview of EHR Practice Preferences, and explains the three sections of the preferences window.
5.7 Practice Preferences - Encounters

Time: 20 minutes  
Product: EPM, File Maintenance  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only), EAS  

This course covers the option settings of the Encounters Practice Preferences. These settings apply only to a specific NextGen practice.

5.8 Practice Preferences - External

Time: 10 minutes  
Product: File Maintenance  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only)  

This course will teach you about the External Practice Preferences.

5.7 Practice Preferences - Forms

Time: 15 minutes  
Product: EPM, File Maintenance  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only), EAS  

This course covers how to Configure the option settings of the ‘Forms’ Practice Preferences.

5.7 Practice Preferences - General

Time: 30 minutes  
Product: EPM, File Maintenance  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only), EAS  

This course covers how to configure the option settings of the ‘General’ Practice Preferences.

5.7 Practice Preferences - Holidays

Time: 10 minutes  
Product: EPM, File Maintenance  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only)  

This course covers the Holiday Practice Preferences and how to set them up.

5.8 Practice Preferences - Introduction

Time: 20 minutes  
Product: EPM, File Maintenance, System Administrator  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only)
This course is intended to familiarize you with Practice Preferences and is a prerequisite to all other Practice Preference courses.

5.7 Practice Preferences - Invoices

Time: 10 minutes  
Product: EPM, File Maintenance  
Continuing Education: N/A  
Prerequisites: 5.7 Practice Preferences - Introduction  
Application Version: 5.7  
Appears In: SCT, SCT (EPM Only)

This course covers how to set up the options for ‘Invoices’ Practice Preferences.

5.7 Practice Preferences - Itemized Bills

Time: 10 minutes  
Product: EPM, File Maintenance  
Continuing Education: N/A  
Prerequisites: 5.7 Practice Preferences - Introduction  
Application Version: 5.7  
Appears In: SCT, SCT (EPM Only)

This course covers the option settings in ‘Itemized Bills’ Practice Preferences.

5.7 Practice Preferences - Libraries

Time: 10 minutes  
Product: EPM, File Maintenance  
Continuing Education: N/A  
Prerequisites: 5.7 Practice Preferences - Introduction  
Application Version: 5.7  
Appears In: SCT, SCT (EPM Only), EAS

This course covers the use of default libraries and how to assign them.

5.8 Practice Preferences - Medication

Time: 10 minutes  
Product: EHR, File Maintenance  
Continuing Education: N/A  
Prerequisites: 5.8 Practice Preferences - Introduction  
Application Version: 5.8  
Appears In: SCT, SCT (EPM Only)

This course covers how to set up the options for ‘Medication’ Practice Preferences.

5.8 Practice Preferences - Order Module

Time: 30 minutes  
Product: File Maintenance  
Continuing Education: N/A  
Prerequisites: None  
Application Version: 5.8  
Appears In: SCT, SCT (EPM Only)

This course covers how to set up lab, radiology, and immunization orders related settings in the Orders Module Practice Preferences window.
5.8 Practice Preferences - Patient Information Bar

Time: 15 minutes  Continuing Education: N/A
Product: File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: SCT, SCT (EPM Only)

This course covers how to configure options in the Patient Information Bar from the Practice Preferences window.

5.7 Practice Preferences - Patient Pay

Time: 10 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.7
Prerequisites: 5.7 Practice Preferences - Introduction
Appears In: SCT, SCT (EPM Only)

This course covers the option settings in the ‘Patient Pay’ Practice Preferences.

5.7 Practice Preferences - Printing

Time: 10 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.7
Prerequisites: 5.7 Practice Preferences - Introduction
Appears In: SCT, SCT (EPM Only), EAS

This course covers how to set up the options for Printing Practice Preferences.

5.7 Practice Preferences - Provider

Time: 10 minutes  Continuing Education: N/A
Product: EHR, EPM, File Maintenance  Application Version: 5.7
Prerequisites: 5.7 Practice Preferences - Introduction
Appears In: SCT, SCT (EPM Only), EAS

This course covers how to set up the options for ‘Provider’ Practice Preferences.

5.7 Practice Preferences - Reports

Time: 15 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.7
Prerequisites: 5.7 Practice Preferences - Introduction
Appears In: SCT, SCT (EPM Only), EAS

This course covers the Reports options in Practice Preferences.

5.8 Practice Preferences - Resources

Time: 15 minutes  Continuing Education: N/A
Product: File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: SCT, SCT (EPM Only)

This course covers how to set up lab, radiology, and immunization orders related settings in the Orders Module Practice Preferences window.
5.7 Practice Preferences - Sliding Fee

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM, File Maintenance  
Application Version: 5.7  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only)

This course covers the option settings in the ‘Sliding Fee’ Practice Preferences.

5.8 Practice Preferences - Statements

Time: 10 minutes  
Continuing Education: N/A  
Product: File Maintenance  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only)

This course covers how to set up the Statements Practice Preferences.

5.8 Practice Preferences - Tasks

Time: 10 minutes  
Continuing Education: N/A  
Product: File Maintenance  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only)

This course covers setting options for the Tasks Practice Preferences.

5.7 Practice Preferences - Taxes

Time: 10 minutes  
Continuing Education: N/A  
Product: EPM, File Maintenance  
Application Version: 5.7  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only)

This course covers the settings that will affect the ability to charge sales taxes on procedures, goods, or services.

5.7 Practice Preferences - Tran Codes

Time: 15 minutes  
Continuing Education: N/A  
Product: EPM, File Maintenance  
Application Version: 5.7  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only)

This course covers how how to set up Default and System Generated Transaction Codes for your practice.

5.7 Practice Preferences - Transactions

Time: 20 minutes  
Continuing Education: N/A  
Product: EPM, File Maintenance  
Application Version: 5.7  
Prerequisites: 5.7 Practice Preferences - Introduction  
Appears In: SCT, SCT (EPM Only)

This course covers the Transactions options in Practice Preferences.
5.7 Practice Preferences - Wait List

**Time:** 10 minutes  
**Product:** EPM, File Maintenance  
**Continuing Education:** N/A  
**Application Version:** 5.7

**Prerequisites:** 5.7 Practice Preferences - Introduction

**Appears In:** SCT, SCT (EPM Only)

This course covers the Wait List settings in Practice Preferences.

5.7 System Master Files - Allergies and Allergy Reactions

**Time:** 20 minutes  
**Product:** EHR, File Maintenance  
**Continuing Education:** N/A  
**Application Version:** 5.7

**Prerequisites:** None

**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up system level master files for allergies and allergy reactions in the File Maintenance application.

5.7 System Master Files - CMN Information

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Continuing Education:** N/A  
**Application Version:** 5.7

**Prerequisites:** v5.6 System Master Files - Introduction

**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to create Certificates of Medical Necessity (CMN) forms and how to attach a CMN form to a patient’s encounter.

5.7 System Master Files - Collection Agencies

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Continuing Education:** N/A  
**Application Version:** 5.7

**Prerequisites:** v5.6 System Master Files - Introduction

**Appears In:** SCT, SCT (EPM Only)

This course covers how to set up the System Master File for Collection Agencies in the File Maintenance application. Setting this up allows you to define the collection agencies to use when an encounter is pre-listed to Bad Debt status.

5.7 System Master Files - Counters

**Time:** 15 minutes  
**Product:** EHR, EPM, File Maintenance  
**Continuing Education:** N/A  
**Application Version:** 5.7

**Prerequisites:** v5.6 System Master Files - Introduction

**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to access the Counters System Master File to set counters for various records.
### 5.7 System Master Files - CPT4 Codes

- **Time:** 20 minutes
- **Product:** EHR, EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.7
- **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 for CPT4 Codes in the File Maintenance application.

### 5.8 System Master Files - Diagnosis Codes

- **Time:** 20 minutes
- **Product:** EHR, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** SCT, DWS (EHR Only)

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

### 5.7 System Master Files - Employers

- **Time:** 20 minutes
- **Product:** EHR, EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.7
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up Employers System Master File and associate them in in the EPM and EHR application.

### 5.7 System Master Files - Enterprises

- **Time:** 20 minutes
- **Product:** EHR, EPM, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.7
- **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 - Enterprises in the File Maintenance application.

### 5.7 System Master Files - Equipment Field Map

- **Time:** 20 minutes
- **Product:** EHR, File Maintenance
- **Continuing Education:** N/A
- **Application Version:** 5.7
- **Prerequisites:** v5.6 System Master Files - Introduction
- **Appears In:** No Education Plans

In this course, you will learn how to set up the System Master File Equipment Field Map allowing you to retrieve data from integrated equipment that is interfaced with NextGen EHR, and work efficiently with the NextGen Medical Record templates.
5.7 System Master Files - External Interface Map

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

This course covers how to set up the System Master File - External Interface Map in the File Maintenance application.

5.7 System Master Files - Form and Label Templates

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

This course covers how to set up Forms and Label Master Files in File Maintenance and print them in the EPM application.

5.7 System Master Files - Formats

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

This course covers how to set up Formats System Master File and use it in the EPM application.

5.8 System Master Files - ICD CM Codes

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

This course covers how to set up the ICD CM codes System Master File and use it in the EPM and EHR applications.

5.8 System Master Files - Introduction

Time: 25 minutes
Product: File Maintenance
Prerequisites: None
Appears In: No Education Plans

This course provides a brief overview of system master files.

5.7 System Master Files - Label Products

Time: 15 minutes
Product: EPM, File Maintenance
Prerequisites: v5.6 System Master Files - Introduction
Appears In: SCT, SCT (EPM Only)
This course covers how to create your own custom label products and customized label templates if one of the pre-loaded products doesn’t meet your needs.

### 5.8 System Master Files - Locations

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

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

### 5.8 System Master Files - Medication Tasks

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the Medication Tasks System Master Files and use them in the Medications module of the NextGen Electronic Health Records (EHR) application.

### 5.7 System Master Files - Modifiers and Modifier Categories

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EHR, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the Modifiers and Modifier Categories System Master Files to create and modify Modifiers and Modifier Categories.

### 5.7 System Master Files - Order AOE Questions and Answers

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** EHR, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**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.

### 5.7 System Master Files - Order NextGen Test Compendium and Favorites

**Time:** 25 minutes  
**Continuing Education:** N/A  
**Product:** EHR, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the System Master Files for Order NextGen Test Compendium and Order Test Favorites.
5.7 System Master Files - Order Results Sequences and Notifications

Time: 15 minutes  
Continuing Education: N/A

Product: EHR, File Maintenance  
Application Version: 5.7

Prerequisites: None

Appears In: SCT, DWS (EHR Only)

This course covers how to set up the Order Results Sequences and Order Result Notifications System Master Files.

5.8 System Master Files - Order Tests and Components

Time: 25 minutes  
Continuing Education: N/A

Product: File Maintenance  
Application Version: 5.8

Prerequisites: None

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.

5.7 System Master Files - Patient Responsibility

Time: 20 minutes  
Continuing Education: N/A

Product: EPM, File Maintenance  
Application Version: 5.7

Prerequisites: v5.6 System Master Files - Introduction

Appears In: SCT, SCT (EPM Only)

This course covers how to determine a patient’s poverty level, and with proper setup, distribute charges between the patient and their insurance payer based on their percent of poverty.

5.8 System Master Files - Payers Overview

Time: 30 minutes  
Continuing Education: N/A

Product: File Maintenance  
Application Version: 5.8

Prerequisites: None

Appears In: SCT (EPM Only)

This course covers the general uses of the Payers Master File.

5.8 System Master Files - Payers Part One

Time: 30 minutes  
Continuing Education: N/A

Product: EPM  
Application Version: 5.8

Prerequisites: 5.8 Overview of File Maintenance

Appears In: SCT, SCT (EPM Only), DWS (EHR Only)

This course covers the details of the Defaults 1 and Defaults 2 tabs in the Payers System Master File.

5.8 System Master Files - Payers Part Two

Time: 45 minutes  
Continuing Education: N/A

Product: EPM  
Application Version: 5.8

Prerequisites: 5.8 System Master Files - Payers Part One

Appears In: SCT, SCT (EPM Only), DWS (EHR Only)
This course covers how to set up the remaining tabs of the Payers System Master File.

5.7 System Master Files - Performing Entity Locations

**Time:** 10 minutes  
**Continuing Education:** N/A  
**Product:** EHR, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up locations for a performing entity in the System Master File and use them in the Orders module.

5.7 System Master Files - Pharmacies

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

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

5.7 System Master Files - Practices

**Time:** 20 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.7  
**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 - Practices in the File Maintenance application.

5.7 System Master Files - Printer Aliases

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**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.

5.8 System Master Files - Problem Clinical Status

**Time:** 10 minutes  
**Continuing Education:** N/A  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers the steps involved in creating and editing status descriptions, and how to select one from the Problem Module.
5.8 System Master Files - Providers

**Time:** 60 minutes  
**Product:** EHR, File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

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

5.8 System Master Files - Providers Overview

**Time:** 30 minutes  
**Product:** File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers the basics of the Providers System Master File.

5.7 System Master Files - Revenue Codes

**Time:** 15 minutes  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to use the System Level Master File for Revenue Codes in the File Maintenance application.

5.7 System Master Files - Service Categories

**Time:** 20 minutes  
**Product:** File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to access the Service Categories System Master File to set up service categories.

5.7 System Master Files - Sliding Fee Schedules

**Time:** 45 minutes  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only)

This course covers how to use the System Master File - Sliding Fee Schedules in the File Maintenance application and how the schedules affect a patient’s charges in the EPM application.

5.7 System Master Files - Specialties

**Time:** 15 minutes  
**Product:** EHR, EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers how to set up the System Level Master File for Specialties in the File Maintenance application.
5.7 System Master Files - Specimen Charges

**Time:** 10 minutes  
**Product:** EHR, File Maintenance  
**Prerequisites:** None  
**Appears In:** No Education Plans  

This course covers how to set up the Specimen Charges in the File Maintenance application and use them in the Orders module.

5.8 System Master Files - Task Types

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

This course covers the information and fields necessary to set up Task Types in the System Master Files.

5.7 System Master Files - Taxonomy Codes

**Time:** 20 minutes  
**Product:** EPM, File Maintenance  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only)  

This course covers how to set up the Taxonomy Code and attach it to the Provider, Location, Group, Payer, and DME Region.

5.7 System Master Files - Transaction Codes

**Time:** 20 minutes  
**Product:** EPM, File Maintenance  
**Prerequisites:** v5.6 System Master Files - Introduction  
**Appears In:** SCT, SCT (EPM Only)  

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

5.7 System Master Files - User Image Descriptions

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

This course covers how to set up the User Notes Descriptions System Master File in File Maintenance application and how it is used in the EHR application.
5.7 System Master Files - User Notes Descriptions

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

This course covers how to set up the User Notes Descriptions System Master File in File Maintenance application and how it is used in the EPM application.

5.8 System Master Files - Vaccine Inventory

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

This course covers how to set up the Vaccine Inventory System Master File and to order specific vaccines through the Orders Module in the NextGen Electronic Health Records (EHR) application.

5.8 System Master Files - Vaccine Orders

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

This course covers how to set up the Vaccine Orders System Master File in File Maintenance application and how it is used in the EHR application.

5.8 System Master Files - Vaccine Relationships

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

This course covers how to set up or update vaccine relationships in the Vaccine Relationships System Master File and how the Display and Exclusion relationships are used in the Orders module of EHR.

5.8 System Master Files - VFC Reasons

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

This course covers how to set up the system level master file VFC Reasons in the File Maintenance Application.
5.8 System Master Files - View Categories

**Time:** 20 minutes  
**Product:** File Maintenance  
**Prerequisites:** None  
**Appears In:** SCT, DWS (EHR Only)

This course covers how to set up the View Categories System Master File in File Maintenance application and how it is used in the EHR application.

5.8 System Master Files - VIS Setup

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

This course covers how to attach VIS documents to the Vaccines in the File Maintenance Application, and to view or print them in the Orders module of the EHR.

5.7 System Master Files - Zip Codes

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

This course covers how to set up the Zip Codes System Master File in the File Maintenance application.
# Knowledge Base Model (KBM) - 8.3

## 5.8 KBM 8.3 New Features in KBM 8.3 Templates

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** KBM  
**Application Version:** 5.8  
**Prerequisites:** None  
**KBM Version:** 8.3  
**Specialty Add-On For:** No Education Plans

This course will show you the new features supported in NextGen Knowledge Base Model (KBM) 8.3 templates.

## 5.8 KBM 8.3 Overview of ICD-10 Changes in the KBM

**Time:** 60 minutes  
**Continuing Education:** CME  
**Product:** KBM  
**Application Version:** 5.8  
**Prerequisites:** None  
**KBM Version:** 8.3  
**Specialty Add-On For:** No Education Plans

This course covers the changes made to NextGen’s KBM to accommodate ICD-10.

## 5.8 KBM 8.3 Templates - Care Coordination

**Time:** 60 minutes  
**Continuing Education:** CME  
**Product:** KBM  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** No Education Plans

This course covers the NextGen EHR Care Coordination templates and how to effectively use them to provide the best possible care to a patient.

## 5.8 KBM 8.3 Templates - Care Guidelines Setup

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** KBM  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** No Education Plans

This course covers how to configure the Care Guidelines template to handle Health Maintenance and Disease Management functions in NextGen KBM.

## 5.8 KBM 8.3 Templates - MU Check and CQM Check

**Time:** 30 minutes  
**Continuing Education:** CME  
**Product:** KBM  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** No Education Plans

In this course, you will learn how to assess a patient encounter for completion of Meaningful Use and Clinical Quality Measures using the MU Check and CQM Check templates.
5.8 KBM 8.3 Workflow - Allergy and Immunology

Time: 60 minutes  Continuing Education: CME
Product: KBM  Application Version: 5.8
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  KBM Version: 8.3
Specialty Add-On For: EHR CGT, Provider

This course covers the clinical staff and provider workflows for an initial visit for evaluation of allergy symptoms.

5.8 KBM 8.3 Workflow - Behavioral Health Intake

Time: 60 minutes  Continuing Education: CME
Product: KBM  Application Version: 5.8
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  KBM Version: 8.3
Specialty Add-On For: EHR CGT, Provider

This course covers how to document a Behavioral Health Intake using the Comprehensive Assessment and to document the treatment plan using the Individualized Action Plan.

5.8 KBM 8.3 Workflow - Behavioral Health Psychiatric Diagnostic Evaluation

Time: 60 minutes  Continuing Education: CME
Product: KBM  Application Version: 5.8
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  KBM Version: 8.3
Specialty Add-On For: EHR CGT, Provider

This course covers how to document a Behavioral Health Psychiatric Diagnostic Evaluation with Medical Services using the Psychiatric Eval template, and to document the treatment plan using the Individualized Action Plan.

5.8 KBM 8.3 Workflow - Cardiology

Time: 60 minutes  Continuing Education: CME
Product: KBM  Application Version: 5.8
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  KBM Version: 8.3
Specialty Add-On For: EHR CGT, Provider

This course covers the clinical staff and provider workflows for a Cardiology office visit.

5.8 KBM 8.3 Workflow - Care Management

Time: 60 minutes  Continuing Education: CME
Product: KBM  Application Version: 5.8
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  KBM Version: 8.3
Specialty Add-On For: No Education Plans

In this course, you will have the opportunity to review the Care Manager workflow for a new Care Management client.
5.8 KBM 8.3 Workflow - Dermatology

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

This course covers how to navigate through a Dermatology workflow for both the clinical staff and the provider.

5.8 KBM 8.3 Workflow - Gastroenterology

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

This course covers how to navigate through a Gastroenterology workflow for both the clinical staff and the provider.

5.8 KBM 8.3 Workflow - General Surgery

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

This course covers the clinical staff and provider workflows for a General Surgery office visit.

5.8 KBM 8.3 Workflow - Gynecology

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

This course covers documenting the clinical staff, provider, and checkout workflows for a routine Gynecology visit.

5.8 KBM 8.3 Workflow - Internal Medicine / Family Practice

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

This course covers the Internal Medicine and Family Practice clinical staff and provider workflows for KBM 8.3. This tabbed template set features templates with a unique user interface and a clinically relevant workflow. This course covers the tasks involved for both the clinical staff and provider workflows, and shows how they work together.

5.8 KBM 8.3 Workflow - Nephrology

**Time:** 60 minutes  
**Product:** KBM  
**Continuing Education:** CME  
**Application Version:** 5.8  
**Prerequisites:** 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version:** 8.3  
**Specialty Add-On For:** EHR CGT, Provider

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course will walk you through the steps involved in the clinical staff and provider workflows for a Nephrology visit.

5.8 KBM 8.3 Workflow - Neurology

Time: 60 minutes  
Product: KBM  
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: CME  
Application Version: 5.8  
KBM Version: 8.3

This course covers how to navigate through a Neurology workflow for both the clinical staff and the provider, seeing a patient for evaluation of for a suspected transient ischemic attack (TIA).

5.8 KBM 8.3 Workflow - Neurosurgery

Time: 60 minutes  
Product: KBM  
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: CME  
Application Version: 5.8  
KBM Version: 8.3

This course covers the clinical staff and provider workflows for a Neurosurgery office visit.

5.8 KBM 8.3 Workflow - Obstetrics

Time: 60 minutes  
Product: KBM  
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: CME  
Application Version: 5.8  
KBM Version: 8.3

This course covers the clinical staff and provider workflows for an Obstetrics practice initial prenatal office visit.

5.8 KBM 8.3 Workflow - Oncology

Time: 60 minutes  
Product: KBM  
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: CME  
Application Version: 5.8  
KBM Version: 8.3

This course covers how to navigate through an Oncology workflow for both the clinical staff and the provider, seeing a patient for evaluation of prostate cancer.

5.8 KBM 8.3 Workflow - Ophthalmology

Time: 60 minutes  
Product: KBM  
Prerequisites: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
Specialty Add-On For: EHR CGT, Provider  
Continuing Education: CME  
Application Version: 5.8  
KBM Version: 8.3

This course covers the technician and provider workflows for an Ophthalmology office visit.
<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>Specialty Add-On For</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.8 KBM 8.3 Workflow - Ophthalmology ASC</td>
<td>60 minutes</td>
<td>CME</td>
<td>KBM</td>
<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td>This course will walk you through the pre-operative office visit and surgical workflow for cataract surgery.</td>
</tr>
<tr>
<td>5.8 KBM 8.3 Workflow - Ophthalmology Retina</td>
<td>60 minutes</td>
<td>CME</td>
<td>KBM</td>
<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td>This course covers the technician and provider workflows for a Retina specialty office visit.</td>
</tr>
<tr>
<td>5.8 KBM 8.3 Workflow - Orthopedics</td>
<td>60 minutes</td>
<td>CME</td>
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<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td>This course covers how to document the clinical staff and provider workflows for an Orthopedic office visit.</td>
</tr>
<tr>
<td>5.8 KBM 8.3 Workflow - Otolaryngology</td>
<td>60 minutes</td>
<td>CME</td>
<td>KBM</td>
<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td>This course will teach you to how to navigate through an Otolaryngology workflow for both the clinical staff and the provider seeing a patient for evaluation of chronic sinus problems.</td>
</tr>
<tr>
<td>5.8 KBM 8.3 Workflow - Physical Therapy</td>
<td>60 minutes</td>
<td>CME</td>
<td>KBM</td>
<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td>This course covers how to document the workflow for a physical therapy office visit.</td>
</tr>
<tr>
<td>5.8 KBM 8.3 Workflow - Pulmonary Medicine</td>
<td>60 minutes</td>
<td>CME</td>
<td>KBM</td>
<td>5.8</td>
<td>5.8 KBM 8.3 New Features in KBM 8.3 Templates</td>
<td>EHR CGT, Provider</td>
<td></td>
</tr>
</tbody>
</table>
This course covers how to navigate through a Pulmonary medicine workflow for both the clinical staff and the provider, seeing a patient for evaluation of COPD symptoms.

5.8 KBM 8.3 Workflow - Rheumatology

**Time**: 60 minutes  
**Product**: KBM  
**Continuing Education**: CME  
**Application Version**: 5.8  
**Prerequisites**: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version**: 8.3  
**Specialty Add-On For**: EHR CGT, Provider

This course will teach you how to navigate through a Rheumatology workflow for both the clinical staff and the provider seeing a patient for evaluation of musculoskeletal pain.

5.8 KBM 8.3 Workflow - Urology

**Time**: 60 minutes  
**Product**: KBM  
**Continuing Education**: CME  
**Application Version**: 5.8  
**Prerequisites**: 5.8 KBM 8.3 New Features in KBM 8.3 Templates  
**KBM Version**: 8.3  
**Specialty Add-On For**: EHR CGT, Provider

This course covers how to navigate through a Urology workflow for both the clinical staff and the provider, seeing a patient for blood in his urine and painful urination.
Meaningful Use

NextGen Client Path to Stage 1 Meaningful Use 2014

- **Time:** 45 minutes
- **Product:** Meaningful Use
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course covers the steps that must be completed to demonstrate Stage 1 Meaningful Use (MU) with NextGen solutions.

5.8 KBM 8.3 Overview of Stage 2 Meaningful Use

- **Time:** 60 minutes
- **Product:** KBM, Meaningful Use
- **Prerequisites:** None
- **Appears In:** No Education Plans

In this course, you will learn the steps that must be completed to demonstrate Stage 2 Meaningful Use (MU) with NextGen solutions.
**NextPen 2.0 - Working with NextPen**

<table>
<thead>
<tr>
<th>Time:</th>
<th>45 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product:</td>
<td>NextPen</td>
</tr>
<tr>
<td>Prerequisites:</td>
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<tr>
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<td>No Education Plans</td>
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<tr>
<td>Continuing Education:</td>
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<td>Application Version:</td>
<td>2.0</td>
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</tbody>
</table>

This course covers the features and functionality of both NextPen Print and NextPen Desktop applications.
Optical Management

5.8 Optical Management - Inventory Management
Time: 45 minutes  
Continuing Education: N/A
Product: Optical Management  
Application Version: 5.8
Prerequisites: 5.8 Optical Management - Overview; 5.8 Optical Management - Setup
Appears In: No Education Plans

This course covers how to use the advanced tools in the Optical Management application.

5.8 Optical Management - Overview
Time: 30 minutes  
Continuing Education: N/A
Product: Optical Management  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers the basics of navigating the Optical Management application and using it to process basic customer transactions.

5.8 Optical Management - Reporting
Time: 20 minutes  
Continuing Education: N/A
Product: Optical Management  
Application Version: 5.8
Prerequisites: 5.8 Optical Management - Overview; 5.8 Optical Management - Setup
Appears In: No Education Plans

This course covers the basics of reporting in Optical Management.

5.8 Optical Management - Setup
Time: 40 minutes  
Continuing Education: N/A
Product: Optical Management  
Application Version: 5.8
Prerequisites: 5.8 Optical Management - Overview
Appears In: No Education Plans

This course covers the basics of the proper setup for the NextGen Optical Management application.

5.8 Optical Management - Transactions
Time: 45 minutes  
Continuing Education: N/A
Product: Optical Management  
Application Version: 5.8
Prerequisites: 5.8 Optical Management - Overview
Appears In: No Education Plans

This course covers how transactions are handled in the Optical Management application.
Patient Portal

5.8 Patient Portal - Using Patient Portal
Time: 45 minutes  
Continuing Education: CME
Product: Patient Portal  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans
This course covers an overview of how both portal users (patients, their care managers, etc.) and your medical practice staff NextGen users can communicate with each other using the Patient Portal.

5.8 Patient Portal Setup - First Steps
Time: 60 minutes  
Continuing Education: N/A
Product: Patient Portal  
Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans
This course covers how to begin the setup of your Patient Portal.

5.8 Patient Portal Setup - Forms and Appointments
Time: 25 minutes  
Continuing Education: N/A
Product: Patient Portal  
Application Version: 5.8
Prerequisites: 5.8 Patient Portal Setup - First Steps
Appears In: No Education Plans
This course will teach you how to set up your Patient Portal to send forms and manage appointments.

5.8 Patient Portal Setup - Message Routing Rules
Time: 20 minutes  
Continuing Education: N/A
Product: Patient Portal  
Application Version: 5.8
Prerequisites: 5.8 Patient Portal Setup - First Steps
Appears In: No Education Plans
This course covers how to set up your Patient Portal (NextMD) Message Routing Rules master file to direct electronic patient correspondence received through the Patient Portal to the appropriate recipients at the practice.

5.8 Patient Portal Setup - Online Forms Publisher
Time: 20 minutes  
Continuing Education: N/A
Product: Patient Portal  
Application Version: 5.8
Prerequisites: 5.8 Patient Portal Setup - First Steps
Appears In: No Education Plans
This course covers how to set up your Patient Portal (NextMD) Online Forms Publisher master file to designate which templates to send to your patients' Patient Portal Inbox as forms for them to complete and submit.
5.8 Patient Portal Setup - Payments and Statements

Time: 25 minutes

Product: Patient Portal

Prerequisites: 5.8 Patient Portal Setup - First Steps

Appears In: No Education Plans

This course covers how to set up your Patient Portal to track online payments and display statements.
5.7 Advanced Transactions - Account Level Transactions

Time: 20 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: 5.7 Transactions - Overview of Payment Processing, 5.7 Charges - Working with Charges
Appears In: EPM CGT, EPM End User, Biller

This course will teach you how to enter account-level transactions.

5.7 Advanced Transactions - Credits Setup

Time: 60 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT-EPM End User-Biller

This course covers how to set up three types of credits used in the EPM application.

5.7 Advanced Transactions - Entering Insurance Transactions

Time: 45 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: 5.7 Transactions - Overview of Payment Processing
Appears In: EPM CGT-EPM End User-Biller

This course covers how to enter transactions from third party payers.

5.7 Advanced Transactions - Overview of Credits

Time: 15 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT-EPM End User-Biller

This course provides an introduction to the basics of credits used in the EPM application.

5.7 Advanced Transactions - Using Reason Codes

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT-EPM End User-Biller

This course covers how to work with reason codes on the Payment Entry window.

5.7 Advanced Transactions - Working with Line Item Credits

Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller

This course covers how to transition a credit from one line item to another and from one encounter to another.
5.7 Advanced Transactions - Working with Refunds

Time: 30 minutes  
Product: EPM  
Prerequisites: 5.7 Transactions - Overview of Payment Processing, 5.7 Charges - Working with Charges  
Appears In: EPM CGT, EPM End User, Biller

This course will teach you how to work with both patient and insurance refunds.

5.8 Advanced Transactions - Working with Unapplied Credits

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

This course covers how to use unapplied credits in EPM application.

5.8 Anesthesia Billing - Setup

Time: 40 minutes  
Product: PM, File Maintenance  
Prerequisites: 5.8 Anesthesia Billing - Introduction  
Appears In: No Education Plans

This course covers how to configure File Maintenance to ensure proper anesthesia billing and concurrency rules are applied for PM.

5.8 Anesthesia Billing - Working with Anesthesia Billing

Time: 35 minutes  
Product: PM  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to create anesthesia-related encounters, post charges to them, and run them through a ‘concurrency audit’ in order to properly bill them.

5.7 Appointment Followup - Appointment Reminder Setup

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

This course covers how to set up Appointment Reminder letters and defaults to use in the appointment reminder process.
5.7 Appointment Followup - Recall Plan Setup

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

This course will cover how to set up Recall Plans and use them in the appointment reminder process.

5.7 Appointment Followup - Working with the Appointments Listing Report

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

This course covers how to use the Appointments Listing report as a part of your appointment follow-up process.

5.7 Appointment Followup - Working with Appointment Reminder Letters

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

This course covers how to generate appointment reminder letters for upcoming patient appointments.

5.7 Appointment Followup - Working with Recall Plans

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

This course covers how to work with Recall Plans.

5.7 Appointment Followup - Working with Worklog Tasks

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

This course covers how to work with and report on tasks created as a part of the appointment follow-up process.

5.7 Appointment Followup - Worklog Tasks Setup

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

This course covers how to set up Worklog Tasks and use them in the appointment reminder process.
5.7 Appointments - Navigating the Appointment Book

Time: 30 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: SCT, SCT (EPM Only), EPM End User, Scheduler, Front Desk, EAS

This course covers the different views of the Appointment Book and how to use its toolbar.

5.7 Appointments - Printing Fee Tickets

Time: 30 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk, EAS

This course covers how to print fee tickets in a batch and individual tickets on demand.

5.7 Appointments - Scheduling Appointments

Time: 50 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk, EAS

This course covers how to schedule appointments in the Enterprise Practice Management (EPM) application.

5.7 Appointments - Setting Up the Appointment Book

Time: 45 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: SCT, SCT (EPM Only), EAS

This course covers setting up the Appointment Book in the NextGen Enterprise Practice Management (EPM) application.

5.7 Appointments - Setting Up the Appointment Waitlist

Time: 30 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: SCT, SCT (EPM Only), EAS

This course covers how to set up defaults for the Appointment Wait List.

5.7 Appointments - Working with the Appointment Waitlist

Time: 20 minutes  
Continuing Education: N/A
Product: EPM  
Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk, EAS

This course covers how to work with the Appointment Wait List.
5.7 AutoFlow - Checkin and Checkout Setup

**Time:** 40 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to set up the AutoFlow sequences your organization will use utilizing the File Maintenance application.

5.7 AutoFlow - Checking Out Patients

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to check out patients using the AutoFlow feature in the Enterprise Practice Management (EPM) application.

5.8 Charges - Working with Charges

**Time:** 40 minutes  
**Continuing Education:** N/A  
**Product:** EPM  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk

This course will teach you how to enter charges and charge details in the NextGen EPM application in order to create insurance claims and to bill patients for services rendered.

5.8 Claims - Behavioral Health Billing

**Time:** 60 minutes  
**Continuing Education:** N/A  
**Product:** EPM, File Maintenance  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers the major steps of setting up NextGen to better accommodate the billing needs of behavioral health practices.

5.8 Claims - Billing Employer and Company Accounts

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** EPM  
**Application Version:** 5.8  
**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.
5.7 Claims - Billing Encounters

Time: 20 minutes  
Product: EPM  
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.

5.8 Claims - Processing Claims

Time: 45 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller

This course covers how to process claims using the NextGen EPM application.

5.8 Claims - Professional/CMS 1500 Claim Setup

Time: 45 minutes  
Product: EPM, File Maintenance  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller

This course covers how to set up NextGen to be able to submit printed and electronic Professional/CMS1500 claims.

5.8 Claims - Rebilling Encounters and Regenerating Claims

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

This course covers how to rebill encounters and regenerate archived claims using the NextGen EPM application.

5.8 Credit Card Processing - Adding Deleting and Crediting a Payment

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

This course covers how to add, delete, and credit a credit card payment in NextGen PM.

5.7 Demographics - Adding a New Demographic Record

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

This course covers how to add a new demographic record in the NextGen EPM application.
5.8 Demographics - Overview of the Patient Information Window

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

This course covers the data captured on the various tabs of the Patient Information window.

5.7 Demographics - Overview of the People and Patient Lookup Windows

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

This course covers how to access the People and Patient Lookup Windows.

5.8 Demographics - Patient Chart

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

This course covers how to look up a chart, create a new one, set an active patient and access a previous patient, add a patient contact, update a patient’s privacy notice, add a patient photo, view financial information, print forms for a chart, and create a Quicknote.

5.7 Demographics - Person Records vs. Patient Charts

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

This course covers the basic terminology and structure used by the Enterprise Practice Management (EPM) application to manage your patient’s demographic information.

5.7 Demographics - Updating a Patient’s Address

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

This course covers how to update the patient’s address while changing the same address for one or more relationships at the same time.
5.8 Encounters - Checking In Patients

**Time:** 30 minutes  
**Product:** EPM  
**Application Version:** 5.8  
**Continuing Education:** N/A  
**Prerequisites:** 5.8 Encounter - Working with Encounters  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk

This course covers the basic functions in the Checkin/Create Encounter process. In addition, you will learn how to check in new and existing patients, add a new guarantor, insurance and an authorization. You will also learn to collect a patient's co-payment and update a privacy notice.

5.8 Encounters - Working with Encounters

**Time:** 30 minutes  
**Product:** EPM  
**Application Version:** 5.8  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** EPM CGT, EPM End User, Biller, Front Desk

This course covers the basic functions of working with encounters. You will also learn to create an encounter from the chart, search for an encounter, add a diagnosis code to an encounter, add an encounter note, and add insurance to an encounter.

5.7 EPM - Common Buttons, Fields, and Features

**Time:** 20 minutes  
**Product:** EPM  
**Application Version:** 5.7  
**Continuing Education:** N/A  
**Prerequisites:** 5.7 EPM - Navigating the Application Desktop  
**Appears In:** SCT, SCT (EPM Only), EPM CGT, EPM End User, Biller, Scheduler, Front Desk, EAS

This course will teach you about the common elements found in the Practice Management application.

5.7 EPM - Navigating the Application Desktop

**Time:** 25 minutes  
**Product:** EPM  
**Application Version:** 5.7  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** SCT, SCT (EPM Only), EPM CGT, EPM End User, Biller, Scheduler, Front Desk, EAS

This course provides an overview of the EPM desktop components.

5.8 EPM Enhancements Overview

**Time:** 40 minutes  
**Product:** EPM  
**Application Version:** 5.8  
**Continuing Education:** N/A  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course provides an overview of the 5.8 enhancements for the Enterprise Practice Management (EPM) and File Maintenance applications.
5.8 EPM - ICD-10 Enhancements Overview

Time: 45 minutes  
Product: EPM  
Application Version: 5.8  
Prerequisites: None  
Appears In: No Education Plans

This course covers enhancements made in the File Maintenance and EPM applications to support ICD-10 codes.

5.8 EPM User Preferences - Administration

Time: 30 minutes  
Product: EPM  
Application Version: 5.8  
Prerequisites: 5.8 Overview of File Maintenance; 5.8 Security - Rights and Permissions  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

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

5.8 EPM User Preferences - General

Time: 30 minutes  
Product: EPM  
Application Version: 5.8  
Prerequisites: 5.7 Navigating the EPM Application Desktop; 5.7 EPM - Common Buttons, Fields, and Features  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers how to customize your EPM General User Preferences.

5.8 EPM User Preferences - Locations

Time: 10 minutes  
Product: EPM  
Application Version: 5.8  
Prerequisites: 5.7 Navigating the EPM Application Desktop; 5.7 EPM - Common Buttons, Fields, and Features  
Appears In: EPM CGT, EPM End User, Biller, Front Desk

This course covers how to set your EPM Location User Preferences.

5.8 EPM User Preferences - Scheduling

Time: 30 minutes  
Product: EPM  
Application Version: 5.8  
Prerequisites: 5.7 Navigating the EPM Application Desktop; 5.7 EPM - Common Buttons, Fields, and Features  
Appears In: EPM CGT, EPM End User, Scheduler, Front Desk

This course covers how to set your EPM Scheduling User Preferences.

5.8 ERA - Electronic Remittance Advice Setup

Time: 60 minutes  
Product: EPM, File Maintenance  
Application Version: 5.8  
Prerequisites: None  
Appears In: No Education Plans

This course covers how to set up your NextGen system for Electronic Remittance Advice (ERA) processing.
5.8 ERA - Processing Electronic Remittance Advices
Time: 30 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans
This course covers how to process ERA files using the NextGen EPM application.

5.7 Guarantor Accounts
Time: 40 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: None
Appears In: EPM CGT, EPM End User, Biller, Front Desk
This course covers the basics of guarantor accounts that are part of the Enterprise Practice Management (EPM) application.

5.8 In Progress Billing - Setup
Time: 30 minutes  Continuing Education: N/A
Product: EPM, File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans
This course covers how to configure NextGen to utilize In Progress billing for a practice.

5.8 In Progress Billing - Working with In Progress Billing
Time: 60 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans
This course covers how to create encounters that can be held in an In Progress status until a later date when they are ready to be billed.

5.7 Insurance - Adding an Authorization
Time: 40 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: 5.7 Insurance - Adding Insurance to a Person
Appears In: EPM CGT, EPM End User, Biller, Scheduler
This course covers how to handle authorization codes that you receive and associate them with an encounter.

5.7 Insurance - Adding an Employer with Insurance
Time: 15 minutes  Continuing Education: N/A
Product: EPM  Application Version: 5.7
Prerequisites: 5.7 Insurance - Adding Insurance to a Person
Appears In: EPM CGT, EPM End User, Biller, Scheduler
This course covers how to attach an employer with insurance to a person’s demographic record in the EPM application.

### 5.7 Insurance - Adding Insurance to a Person

- **Time:** 45 minutes
- **Product:** EPM
- **Application Version:** 5.7
- **Prerequisites:** None
- **Appears In:** EPM CGT, EPM End User, Biller, Scheduler

This course will teach you how to attach an insurance payer to a person’s demographic record.

### 5.8 Introduction to NextGen PM - Billing

- **Time:** 30 minutes
- **Product:** EPM
- **Application Version:** 5.8 UD1
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course provides an example of the billing flow of NextGen PM.

### 5.8 Introduction to NextGen PM - Front Office

- **Time:** 30 minutes
- **Product:** EPM
- **Application Version:** 5.8 UD1
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course provides an example of the front office flow of NextGen PM.

### 5.8 Overview of Appointment Setup

- **Time:** 50 minutes
- **Product:** EPM
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** SCT, SCT (EPM Only), EPM End User, Scheduler, Front Desk

This course covers the basics of the NextGen Appointment Scheduling Process and how the EPM application is set up to address a practice’s scheduling needs. Here, you will also learn how the EPM application is set up and used to accomplish a practice’s checkin and checkout processes.

### 5.8 Overview of Billing Setup

- **Time:** 45 minutes
- **Product:** EPM
- **Application Version:** 5.8
- **Prerequisites:** None
- **Appears In:** No Education Plans

This course covers 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.
5.8 Overview of Charges and Contracts Setup

Time: 45 minutes  
Product: EPM  
Prerequisites: None  
Appears In: No Education Plans  
Continuing Education: N/A  
Application Version: 5.8

This course covers the basics of charge entry setup that will help you to customize the NextGen applications to meet your practice’s needs.

5.8 Overview of Collection Setup

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: No Education Plans  
Continuing Education: N/A  
Application Version: 5.8

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

5.8 Overview of Payment Posting Setup

Time: 40 minutes  
Product: EPM  
Prerequisites: None  
Appears In: No Education Plans  
Continuing Education: N/A  
Application Version: 5.8

This course covers the basics of the Payment Posting Process and how the NextGen applications are set up to perform this process.

5.7 Statements- Generating Statements in a Batch

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller  
Continuing Education: N/A  
Application Version: 5.7

This course covers the statement batch process in the Enterprise Practice Manager (EPM) application.

5.7 Statements - Generating Statements on Demand

Time: 30 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, EPM End User, Biller  
Continuing Education: N/A  
Application Version: 5.7

This course covers how to generate individual statements on demand.

5.7 Statements - Setting Up Payer Specific Dunning Messages

Time: 20 minutes  
Product: EPM  
Prerequisites: None  
Appears In: EPM CGT, Biller  
Continuing Education: N/A  
Application Version: 5.7

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers the steps to set up simple, custom, and payer specific dunning messages in the Enterprise Practice Management (EPM) application.

### 5.8 Statements - Setting Up Your Statement Process

**Time:** 40 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** EPM CGT, Biller

This course covers how to set up your statement process in the Practice Management (PM) application.

### 5.8 Transaction Approval - Setup

**Time:** 30 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

The Transaction Approval feature supports the requirement for approval for transactions that exceed specified dollar amounts. This includes adjustments, refunds, and payments. This 30-minute course covers how to set up this process in the PM application.

### 5.7 Transactions - Overview of Payment Processing

**Time:** 30 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.7  
**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.

### 5.8 UD1 PM Enhancement Overview

**Time:** 40 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.8 UD1  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course provides an overview of the 5.8 UD1 enhancements for the Practice Management (PM) and File Maintenance applications.

### 5.8 Worklog Manager - Administration

**Time:** 45 minutes  
**Product:** EPM  
**Continuing Education:** N/A  
**Application Version:** 5.8  
**Prerequisites:** 5.8 Worklog Manager - Introduction  
**Appears In:** No Education Plans

This course covers how to set up the Worklog Manager, thereby allowing your practice to improve its operational efficiency.
5.8 Worklog Manager - Introduction

**Time:** 20 minutes  
**Product:** EPM  
**Prerequisites:** 5.8 Introduction to the EPM  
**Appears In:** No Education Plans

This course covers introductory information on how to work with the Worklog Manager within the EPM application.

5.8 Worklog Manager - Task Reports

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

This course covers the Task Details and Task Analysis reports, which allow you to track and report on the assigned tasks.

5.8 Worklog Manager - Using Worklog Manager

**Time:** 45 minutes  
**Product:** EPM  
**Prerequisites:** 5.8 Worklog Manager - Introduction  
**Appears In:** No Education Plans

This course covers the functions of the Worklog Manager, as well as how to create and work on tasks in the EPM application.
### 5.8 Application Launcher

**Time:** 15 minutes  
**Continuing Education:** N/A  
**Product:** EPM, EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** All Education Plans

This course covers how to navigate the Application Launcher that is used to access the NextGen application and create desktop shortcut and menu items from the Application launcher.

### 5.8 How PM and EHR Work Together

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** PM, EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** SCT

This course covers how PM and EHR work together to synchronize patient data, use shared File Maintenance files, share appointment and encounter information, process charges PM that were created in EHR, create tasks in one application to be worked in another application, and manage case information on the Case Management window in PM and EHR.

### 5.8 Introduction to NextGen

**Time:** 45 minutes  
**Continuing Education:** N/A  
**Product:** EPM, EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course will introduce you to some of the key terms and concept that will help you understand NextGen applications better.

### 5.8 PM and EHR Charge Interaction

**Time:** 30 minutes  
**Continuing Education:** N/A  
**Product:** PM, EHR  
**Application Version:** 5.8  
**Prerequisites:** None  
**Appears In:** No Education Plans

This course covers how to process pending charges in the holding tank individually or in a batch, work with rejected charges, reorder charges when using the holding tank, run the EHR Manual Charge Processing reports, and process charges without the holding tank. It also covers how unapplied payments are handled in the Pending Charges Holding Tank and Real Time processes.

### 5.8 SetDB Application

**Time:** 10 minutes  
**Continuing Education:** N/A  
**Product:** PM, EHR  
**Application Version:** 5.8  
**Prerequisites:** 5.8 Introduction to NextGen  
**Appears In:** SCT, SCT (EPM Only), DWS (EHR Only)

This course covers the use of the SetDB application.
Population Health

Population Health 1.3 - Administration

Time: 60 minutes  
Product: Population Health  
Prerequisites: None  
Appears In: No Education Plans  
Continuing Education: N/A  
Application Version: 1.3

This course covers to use the Population Health Administration tool to configure your Population Health solution. It also provides a brief overview of Population Health.

Population Health 1.3 - Population Profiler

Time: 50 minutes  
Product: Population Health  
Prerequisites: None  
Appears In: No Education Plans  
Continuing Education: N/A  
Application Version: 1.3

This course will teach you how to use the Population Profiler application to define custom patient populations and, within those populations, specific treatment opportunities that you can then target with automated patient outreach communications through NextGen’s Population Health solution.
Reports

5.8 Reports - AR Reports
Time: 40 minutes              Continuing Education: N/A
Product: EPM, EHR, File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers the basic functions of the AR reports. You will also learn to review Medicare secondary balances, review payer credit balances, review patient account balances, review unapplied credits, review open claims, review unbilled encounters, and track AR by month.

5.8 Reports - Basic Functions
Time: 45 minutes              Continuing Education: N/A
Product: EPM, EHR, File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers basic functions in NextGen reports, such as running reports, printing reports, previewing reports, cancelling reports, graphing report data, exporting report data, memorizing reports, taking a snapshot of the data, and working with reports.

5.8 Reports - Customizing Reports
Time: 40 minutes              Continuing Education: N/A
Product: EPM, EHR, File Maintenance  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers basic functions in NextGen reports, such as adding and deleting columns, using the Filter 1 and Filter 2 settings, using EHR filters, sorting data, configuring report totals, customizing headers and footers.

5.8 Reports - Daily Reports
Time: 25 minutes              Continuing Education: N/A
Product: EPM  Application Version: 5.8
Prerequisites: 5.8 Reports - Basic Functions
Appears In: No Education Plans

This course covers basic functions in Daily reports. You will also learn to use Daily reports to recreate a batch listing, find encounters with no charges, balance charges to daily fee tickets, and balance daily transactions.

5.8 Reports - EHR Reports
Time: 20 minutes              Continuing Education: N/A
Product: EHR  Application Version: 5.8
Prerequisites: None
Appears In: No Education Plans

This course covers how to set up and work with the Reporting tool to produce EHR related reports.
5.8 Reports - File Maintenance Reports

Time: 30 minutes  
Product: EPM  
Prerequisites: 5.8 Reports - Basic Functions  
Appears In: No Education Plans  

This course covers the basic functions in the File Maintenance reports. You will also learn to use File Maintenance reports to report on groups and users set up in System Administrator, run a Service Items Summary Listing report, check NPI numbers, run a Transaction Code Listing report, and run a Claim Edits Listing report.

5.8 Reports - General Reports

Time: 30 minutes  
Product: EPM  
Prerequisites: 5.8 Reports - Basic Functions  
Appears In: No Education Plans  

This course covers the basic functions in the General reports. You will also learn to use General reports to check privacy notices, check alerts, check active patient insurance, check user activity, and check for potential duplicate persons.

5.8 Reports - Monthly Reports

Time: 40 minutes  
Product: EPM  
Prerequisites: 5.8 Reports - Basic Functions  
Appears In: No Education Plans  

This course covers the basic functions in the Monthly reports. You will also learn to use Monthly reports to balance charges and transactions, examine provider productivity, examine net collections by financial class and payer, and display diagnosis codes.

5.8 Reports - Scheduling Reports

Time: 30 minutes  
Product: EPM  
Prerequisites: 5.8 Reports - Basic Functions  
Appears In: No Education Plans  

This course covers the basic functions in the Scheduling reports. You will also learn to use Scheduling reports to monitor appointment scheduling activity, find kept appointments without charges, measure access to care, analyze appointments, and view patients on the Wait List.

5.8 Reports - Troubleshooting Your EPM Reports

Time: 15 minutes  
Product: EPM  
Prerequisites: 5.8 Reports - Basic Functions  
Appears In: No Education Plans  

This course covers the steps to take to balance multiple reports and how to run System reports.
System Administrator

5.8 Advanced Audit

Time: 20 minutes
Product: Advanced Audit Application
Prerequisites: None
Appears In: No Education Plans

This course covers the NextGen Advanced Audit application and the Audit Reporting Tool.

Contract Utility 3.2

Time: 45 minutes
Product: Contract Utility
Prerequisites: 5.7 Libraries - Contracts
Appears In: No Education Plans

This course covers how to import, export, and globally update contracts using a separate utility called the Contract Utility.

5.7 License Manager

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

This course covers how to access and use the License Manager application to monitor the status of existing licenses, add and update licenses to activate additional NextGen products, and expand the limits of currently licensed NextGen products.

5.8 Overview of System Security

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

This course covers how NextGen provides and maintains system security and protects its data from unauthorized access or individuals.

5.8 Security - Creating and Managing Users

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

This course covers how to create, modify, delete, deactivate, and restore users.

5.8 Security - Creating and Managing User Groups

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

This course covers how to create, modify, delete user groups, as well as how to add existing groups from other Practices.

5.7 Security - Password Requirements for Users

Time: 15 minutes  
Continuing Education: N/A  
Product: EHR, EPM, System Administrator  
Application Version: 5.7  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only), EAS  

This course covers the issues your organization needs to address to set up password requirements for secure user sign on.

5.7 Security - Patient Sharing

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR, EPM, System Administrator  
Application Version: 5.7  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only), EAS  

This course covers how to create inclusion and exclusion lists for users.

5.7 Security - Preferred Locations

Time: 30 minutes  
Continuing Education: N/A  
Product: EHR, EPM, System Administrator  
Application Version: 5.7  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only), EAS  

This course covers how to segregate different locations that work autonomously within a practice so as to not allow users to view or enter data (encounters, etc.) for non-specified locations.

5.8 Security - Rights and Permissions

Time: 20 minutes  
Continuing Education: N/A  
Product: EPM, EHR, System Administrator  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, SCT (EPM Only), DWS (EHR Only)  

This course covers how to set up security rights and permissions for Groups in the System Administrator application.

5.8 Universal Preferences

Time: 20 minutes  
Continuing Education: N/A  
Product: System Administrator  
Application Version: 5.8  
Prerequisites: None  
Appears In: SCT, DWS (EHR Only)  

This course covers how to identify and modify Universal Preferences.
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