# Table of Contents

This document is for informational purposes only. You cannot launch eLearning courses from this page.

<table>
<thead>
<tr>
<th>Module</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>v5.6 Background Business Processor - Introduction</td>
<td>3</td>
</tr>
<tr>
<td>v5.6 Background Business Processor - Setup</td>
<td>3</td>
</tr>
<tr>
<td>v5.6 Background Business Processor - Packages Jobs and Schedules</td>
<td>3</td>
</tr>
<tr>
<td>v5.6 Background Business Processor - Copying Packages Jobs and Schedules</td>
<td>3</td>
</tr>
<tr>
<td>v5.6 ePrescribing - Setting Up eRx</td>
<td>4</td>
</tr>
<tr>
<td>v5.6 ePrescribing - Working with eRx</td>
<td>4</td>
</tr>
<tr>
<td>v5.6 ERA - Electronic Remittance Advice Setup</td>
<td>4</td>
</tr>
<tr>
<td>v5.6 ERA - Processing Electronic Remittance Advices</td>
<td>4</td>
</tr>
<tr>
<td>v5.6 EHR Orders Module - Setup</td>
<td>5</td>
</tr>
<tr>
<td>v5.6 EHR Orders Module - Ordering Tests</td>
<td>5</td>
</tr>
<tr>
<td>v5.6 EHR Orders Module - Working with Test Results</td>
<td>5</td>
</tr>
<tr>
<td>v5.6 ICS - Getting Started</td>
<td>6</td>
</tr>
<tr>
<td>v5.6 ICS Setup - System Administrator</td>
<td>6</td>
</tr>
<tr>
<td>v5.6 ICS Setup - Security and Administration</td>
<td>6</td>
</tr>
<tr>
<td>v5.6 ICS Setup - File Maintenance</td>
<td>6</td>
</tr>
<tr>
<td>v5.6 ICS Setup - Attaching an EOB Scan</td>
<td>7</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Scanning and Batches</td>
<td>7</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Searching and Search Results</td>
<td>7</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Viewer Tools</td>
<td>7</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Reports</td>
<td>8</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Workflow and PAQ Integration</td>
<td>8</td>
</tr>
<tr>
<td>v5.6 ICS Usage - Attaching an EOB</td>
<td>8</td>
</tr>
<tr>
<td>v5.6 EHR Reports - Working with EHR Reports</td>
<td>8</td>
</tr>
<tr>
<td>v5.6 Reports - Working With EPM Reports</td>
<td>9</td>
</tr>
<tr>
<td>v5.6 Reports - Working with AR Reports</td>
<td>9</td>
</tr>
<tr>
<td>v5.6 Reports - Working with Daily Reports</td>
<td>9</td>
</tr>
<tr>
<td>v5.6 Reports - Working with Monthly Reports</td>
<td>9</td>
</tr>
<tr>
<td>v5.6 Reports - Troubleshooting Your EPM Reports</td>
<td>10</td>
</tr>
<tr>
<td>v5.6 Worklog Manager - Introduction</td>
<td>10</td>
</tr>
<tr>
<td>v5.6 Worklog Manager - Using Worklog Manager</td>
<td>10</td>
</tr>
<tr>
<td>v5.6 Worklog Manager - Task Reports</td>
<td>11</td>
</tr>
</tbody>
</table>
Overview

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

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

Presentation

eLearning content is presented 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 by going to the My Courses – Completed page of your eLearning account. In the Learning Center, a course is represented by a red book.

- A curriculum is a grouping of one or more courses related to a larger, more general subject area. In the Learning Center, a curriculum is represented by a red book with a blue band.

- An education plan is a grouping of several curricula that apply to a particular role or job function, such as System Configuration Training or Biller. In the Learning Center, an education plan is represented by a red book with a blue band inside a yellow box.

Searching This Guide

To search for a specific course or topic, hit Ctrl+f on your keyboard to bring up a search box. Type a keyword or part of the course name, and then hit 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, hit Enter on your keyboard.

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, “CME: Yes”.

Contacting eLearning

The eLearning Resource Center (eRC) website is available 24-hours a day to assist you with your eLearning needs. Click the Support button in the top right corner of your eLearning account screen for access to help files, downloads, articles, enrollment forms and more.

To contact the Learning Center directly, please send an email to learning@nextgen.com.
The purpose of this curriculum is to introduce users to the NextGen ancillary applications, which work to support and enhance the Enterprise Practice Management (EPM) and Electronic Health Record (EHR) applications. The estimated time to complete this curriculum is 18 hours.

v5.6 Background Business Processor - Introduction

**Time:** 30 minutes  
**Product:** BBP, EPM  
**Application Version:** 5.6  
**Prerequisites:** None

This course provides a basic introduction and overview for the Background Business Processor (BBP).

**What You’ll Learn:**
- Access the Background Business Processor.
- Understand the terminology associated with the Background Business Process.

v5.6 Background Business Processor - Setup

**Time:** 30 minutes  
**Product:** BBP, EPM  
**Application Version:** 5.6  
**Prerequisites:** None

This course covers how to set up the Background Business Processor (BBP).

**What You’ll Learn:**
- Understand the requirements for installation of the Background Business Processor.
- Understand how to setup the BBP Security Rights.
- Understand how to setup the BBP preferences.
- Understand the installation of the Engine Service.

v5.6 Background Business Processor - Packages Jobs and Schedules

**Time:** 45 minutes  
**Product:** BBP, EPM  
**Application Version:** 5.6  
**Prerequisites:** None

This course covers how to set up packages and jobs in the Background Business Process (BBP).

**What You’ll Learn:**
- Create a BBP package.
- Assign the BBP server that will run the package.
- Create the job(s) that will run in that package.
- Schedule a package to run at a pre-defined time.

v5.6 Background Business Processor - Copying Packages Jobs and Schedules

**Time:** 30 minutes  
**Product:** BBP, EPM  
**Application Version:** 5.6  
**Prerequisites:** None

This course covers copying packages-jobs, and schedules in the Background Business Process (BBP).

**What You’ll Learn:**
- Copy a package and its jobs to create a new package and jobs.
- Copy a job within a package.
- Copy a schedule and modify it for the package.
v5.6 ePrescribing - Setting Up eRx

Time: 60 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Complete the initial setup steps.
• Work within File Maintenance to download SureScripts pharmacies database-enroll providers, and setup tasks/categories.
• Create workgroups and task lists.
• Manage the eRx services-ensuring its proper function, keeping all databases current, and managing eRx operations.

v5.6 ePrescribing - Working with eRx

Time: 30 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.6
Prerequisites: None

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.

What You’ll Learn:
• Define ePrescribing-SureScripts, and the relationship between the two.
• Understand Medicare incentives for using ePrescribing (eRx).
• Understand the DEA guidelines for electronic prescribing.
• Send new prescriptions.
• Respond to refill requests.

v5.6 ERA - Electronic Remittance Advice Setup

Time: 60 minutes  Continuing Education: None
Product: EPM  Application Version: 5.6
Prerequisites: None

This course covers how to set up your NextGen system for Electronic Remittance Advice (ERA) processing.

What You’ll Learn:
• Set up your ERA-related Reason Codes.
• Set up your ERA-related Transaction Codes.
• Set up Payers for ERA acceptance.
• Set up your Remittance Profile(s).
• Decide upon a network location for ERA files.

v5.6 ERA - Processing Electronic Remittance Advices

Time: 60 minutes  Continuing Education: None
Product: EPM  Application Version: 5.6
Prerequisites: None

This course covers the basics of how to process Electronic Remittance Advices (ERAs) in the EPM application.
What You’ll Learn:
- Import your ERA files into the NextGen EPM application.
- Understand the ERA Import Posting Report.
- Use Batch Posting to reconcile and post your ERA results.
- View Transaction-based EOB data upon import.

v5.6 EHR Orders Module - Setup

Time: 20 minutes  Continuing Education: None
Product: EHR, File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
- Set up the security rights and permissions for the Orders module.
- Recall the System Master Files that need to be set up before using the Orders module.

v5.6 EHR Orders Module - Ordering Tests

Time: 45 minutes  Continuing Education: None
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: 5.6 System Master Files - Orders AOE Questions and Answers, 5.6 System Master Files - Orders Tests and Components, 5.6 System Master Files - Order NextGen Test Compendium and Favorite, 5.6 EHR - Orders Module - Setting Up

This course will teach you how to order lab or radiology tests in the Orders module.

What You’ll Learn:
- Access the Orders module and the Orders tab.
- Order lab and radiology tests.
- Complete the test and order information as needed.
- View-update, cancel, delete, and print an order.

v5.6 EHR Orders Module - Working with Test Results

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: 5.6 System Master Files - Orders AOE Questions and Answers, 5.6 System Master Files - Orders Tests and Components, 5.6 System Master Files - Order NextGen Test Compendium and Favorite, 5.6 EHR - Orders Module - Setting Up, 5.6 EHR - Orders Module - Ordering Tests

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

What You’ll Learn:
- Review a patient's test results.
- Enter test results manually if needed.
- Attach documents or images to a test result.
- Enter sign off comments for test results.
- Sign off test results in the Orders module and Provider Approval Queue (PAQ) module.
v5.6 ICS - Getting Started

Time: 30 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Cite examples of documents that are scanned into ICS.
• Access and login to the ICS application.
• Identify buttons and fields available on the user interface.
• Customize the interface to your needs.
• Connect to an ICS scanner.

v5.6 ICS Setup - System Administrator

Time: 15 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Open the System Administrator application.
• Open a Groups’ profile window.
• Open the Rights window.
• Select a Rights Category and assign rights.
• Apply user licensing for ICS to an individual user.

v5.6 ICS Setup - Security and Administration

Time: 20 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Set up user rights within ICS.
• Access Enterprise Preferences within ICS.
• Set up ICS user preferences for individual users.
• Activate the Patient Synch option.

v5.6 ICS Setup - File Maintenance

Time: 60 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

This course is designed to instruct the student how to set up the File Maintenance tables used in the NextGen ICS application.
What You’ll Learn:
• Access the File Maintenance application.
• Access the tables used for NextGen ICS.
• Set up tables used for NextGen ICS.

v5.6 ICS Setup - Attaching an EOB Scan

Time: 60 minutes  
Continuing Education: None
Product: ICS  
Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Set up an EOB Document Type.
• Create an EOB Quick File Hot Key.
• Assign an EOB Quick File Configuration.
• Allow the appropriate users access to the EOB Document Type.

v5.6 ICS Usage - Scanning and Batches

Time: 30 minutes  
Continuing Education: None
Product: ICS  
Application Version: 5.6
Prerequisites: None

Covers how to acquire and save images in NextGen ICS.

What You’ll Learn:
• Acquire images into NextGen ICS.
• Acquire and save images in batches.
• File and post batches.
• Delete a batch.

v5.6 ICS Usage - Searching and Search Results

Time: 30 minutes  
Continuing Education: None
Product: ICS  
Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Search for images and documents using the Image Lookup.
• Use advanced search criteria functionality.
• Customize the search results window.
• View results in the ICS Viewer.

v5.6 ICS Usage - Viewer Tools

Time: 30 minutes  
Continuing Education: None
Product: ICS  
Application Version: 5.6
Prerequisites: None

Covers the options available on the ICS Viewer Toolbar—as well as how to annotate documents.
What You’ll Learn:
• Identify buttons and icons on the ICS Viewer Toolbar.
• Annotate a document.

v5.6 ICS Usage - Reports

Time: 30 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Create ICS-specific reports.
• Filter report data.
• Configure report totals and sort report information.
• Run reports.

v5.6 ICS Usage - Workflow and PAQ Integration

Time: 30 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Create a To Do Task within ICS.
• Access To Tasks from the Workflow Module in NextGen EHR.
• File a document to send to a provider's PAQ.
• Open the document within PAQ in NextGen EHR.

v5.6 ICS Usage - Attaching an EOB

Time: 30 minutes  Continuing Education: None
Product: ICS  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Scan and File an EOB Image using NextGen ICS.
• Link an EOB Image to a Posting Batch in the NextGen EPM.
• View an EOB Image from a Patient’s Chart.

v5.6 EHR Reports - Working with EHR Reports

Time: 20 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.6-5.6 SP1
Prerequisites: None

This course covers how to set up and generate reports in the EMR application.
What You’ll Learn:
• Generate specific patient reports using the EMR Report tool, sorting patient information by diagnosis, procedure, allergy, and or medication.
• Create Report Types using the NextGen File Maintenance application that will allow you to save reports in pre-determined categories.
• Set up specific sorting criteria using the Report filter, to pull patient and numeric data.

v5.6 Reports - Working With EPM Reports

Time: 45 minutes  
Continuing Education: None
Product: EPM  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Describe each type of EPM report.
• Set up security for EPM report users.
• Match each icon on the Report Toolbar with its function.
• Match each date used in the report process with its function and use.
• Match each tab on the Report Filter window with its use.

v5.6 Reports - Working with AR Reports

Time: 40 minutes  
Continuing Education: None
Product: EPM  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Match each type of AR report with its description and use.
• List the data source and financial class for each AR report.
• Describe how to work with the Report Filter window for each AR report.
• Describe how to balance AR reports with other reports.

v5.6 Reports - Working with Daily Reports

Time: 20 minutes  
Continuing Education: None
Product: EPM  
Application Version: 5.6-5.6 SP1
Prerequisites: 5.6 Reports - Working with EPM Reports

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

What You’ll Learn:
• Use Daily reports
• List the data sources and payers for each report
• Balance Daily reports with other reports

v5.6 Reports - Working with Monthly Reports

Time: 30 minutes  
Continuing Education: None
Product: EPM  
Application Version: 5.6-5.6 SP1
Prerequisites: None

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course is intended to instruct the student in how to run-read, and compare monthly reports in the Enterprise Practice Management (EPM) application.

**What You’ll Learn:**
- Match each type of Monthly report with its description and use.
- List the data source and financial class for each Monthly report.
- Describe how to work with the Report Filter window for each Monthly report.
- Describe how to balance Monthly reports with other reports.

**v5.6 Reports - Troubleshooting Your EPM Reports**

**Time:** 25 minutes
**Continuing Education:** None
**Product:** EPM
**Application Version:** 5.6-5.6 SP1
**Prerequisites:** 5.6 Reports - Working with EPM Reports

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

**What You’ll Learn:**
- Use System reports to verify the integrity of the data.
- List ways to ensure multiple reports balance.
- List ways to ensure the consistency of the report data.
- List ways to ensure the accuracy of the report data.

**v5.6 Worklog Manager - Introduction**

**Time:** 20 minutes
**Continuing Education:** None
**Product:** EPM
**Application Version:** 5.6-5.6 SP1
**Prerequisites:** None

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

**What You’ll Learn:**
- Define Worklog Manager as it applies to the NextGen Enterprise Practice Management (EPM) application.
- Have an understanding how the Worklog Manager functions in the NextGen EPM application.

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

**Time:** 45 minutes
**Continuing Education:** None
**Product:** EPM
**Application Version:** 5.6-5.6 SP1
**Prerequisites:** None

This course covers the functions of the Worklog Manager—including how to create tasks, follow up on tasks, and complete tasks in the NextGen EPM application.

**What You’ll Learn:**
- Define Worklog Manager and tasks as they apply to the NextGen Enterprise Practice Management (EPM) application.
- Locate tasks that have been assigned to you.
- Create-modify, and complete tasks assigned to you.
- Create tasks from a report.
- Edit and complete workable tasks in the Auto-Flow process.
v5.6 Worklog Manager - Task Reports

Time: 20 minutes  Continuing Education: None
Product: EPM  Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Describe how to access the Worklog Manager Task Reports.
• Know where you grant access to Tasks Reports in the System Administrator.
• Review the Report Toolbar.
• List the differences between the reports.