5.6 Education Plan Guide >> Enterprise Appointment Scheduling (EAS)
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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 and QSI applications. They are designed to provide a basic level of understanding on how to set up and use the Electronic Health Records (EHR), Enterprise Practice Management (EPM), and Electronic Dental Record (EDR) applications, and are intended as precursors to instructor-led training.

Presentation

eLearning content is presented 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 EAS education plan will teach you to set up and work with EAS. It is available only to clients who have purchased EAS. The estimated time to complete this education plan is 23 hours.

**Application Overviews - EPM Only v5.6**

This curriculum focuses on how to access the NextGen applications and databases.

**v5.6 Introduction to the EPM**

**Time:** 45 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

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

**What You’ll Learn:**
- Describe the NextGen EPM (Enterprise Practice Management) application and some of its advantages.
- List the main steps in NextGen Medical Billing process.
- Practice the NextGen billing process in a simulated environment.
- Identify some of the main features of the EPM application.
- Explain how NextGen manages EPM’s database.

**Getting Started in NextGen v5.6**

This curriculum focuses on how to access the NextGen applications and databases.

**v5.6 Application Launcher**

**Time:** 15 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

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

**What You’ll Learn:**
- Open the Application Launcher from your desktop or from the Windows toolbar.
- Review the Legal Disclaimer window.
- Sign on to a NextGen application by using your user name/password combination-or your PIN.
- Customize the NextGen Menu with your desired applications.
- Create desktop shortcuts for the NextGen applications.

**Setting Up System Security v5.6**

This curriculum focuses on setting up application users and other security options.

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

**Time:** 20 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

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

**What You’ll Learn:**
- Define user groups.
- Create-modify, and delete user groups.
- Add existing user groups from other practices.
v5.6 Security - Creating and Managing Users

Time: 30 minutes  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Create new user accounts.
• Modify existing user accounts.
• Add existing users from another practice.
• Deactivate and restore users.

v5.6 Security - Rights and Permissions

Time: 15 minutes  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Assign rights and permissions for modules.
• Assign rights and permissions for operations.
• Import rights and permissions from one group to another.

v5.6 Security - Password Requirements for Users

Time: 15 minutes  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Understand the need for secure passwords.
• Identify Do's and Don'ts for setting up user passwords.
• Determine and assign password requirements to establish secure user logins.

v5.6 Security - Patient Sharing

Time: 30 minutes  
Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Set up patient inclusion and exclusion lists at the Practice level.
• Set up patient inclusion and exclusions lists at the User level.
Setting Up Master Lists v5.6

This curriculum focuses on setting up Master Lists using the File Maintenance application.

v5.6 Master Lists

Time: 30 minutes  
Application Version: 5.6  
Prerequisites: None

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

What You’ll Learn:
- Define items in the Master Lists as they apply to the NextGen application.
- Set up Client Defined fields.
- Describe the components of the Master Lists List window.
- Create Master List values "on the fly".

v5.6 Master Lists - Financial Classes

Time: 15 minutes  
Application Version: 5.6  
Prerequisites: None

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

What You’ll Learn:
- Define a Financial Class as it applies to the NextGen Enterprise Practice Management (EPM) application.
- Identify and collect the information needed to set up Financial Classes.
- Create and modify Financial Classes in the File Maintenance application.

Setting Up Practice Preferences for EAS v5.6

This curriculum focuses on setting up your NextGen Practice Preferences.

v5.6 Practice Preferences - Introduction

Time: 10 minutes  
Continuing Education: None  
Application Version: 5.6-5.6 SP1  
Prerequisites: None

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

What You’ll Learn:
- Access Practice Preferences.
- Access security rights associated with Practice Preferences.

v5.6 Practice Preferences - General

Time: 30 minutes  
Application Version: 5.6-5.6 SP1  
Prerequisites: v5.6 Practice Preferences - Introduction

This course will teach you to configure the option settings of the 'General' Practice Preferences.

What You’ll Learn:
- Configure the option settings of the 'General' Practice Preferences.
v5.6 Practice Preferences - Alerts

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**  
- Set those areas where you wish to see alerts display and how often.

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v5.6 Practice Preferences - Appointment Scheduling

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

This course will teach you to configure the option settings of the 'Appt Scheduling' Practice Preferences.

**What You’ll Learn:**  
- Recall the use of Appointment Scheduling preference options.  
- Set required fields when creating appointments.

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v5.6 Practice Preferences - Chart

**Time:** 30 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**  
- Add custom fields to charts.  
- Configure your general chart options.  
- Determine your practice’s medical record number preferences.  
- Determine how your practice will use NextGen's Appointment Event SIM Carryover functionality.

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v5.6 Practice Preferences - Encounters

**Time:** 15 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**  
- Add custom fields to encounters.  
- Configure your general encounter options.  
- Set up your encounters for UB billing.

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v5.6 Practice Preferences - Forms

**Time:** 15 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

This course will teach you to configure the option settings of the 'Forms' Practice Preferences.

**What You’ll Learn:**  
- Perform the steps to activate default fields.  
- Establish your statement exporting delimiters and text qualifiers and EDI Stock ID.
v5.6 Practice Preferences - Libraries

**Time:** 5 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**
- Understand the use of default libraries.
- Perform the steps to assign default Libraries.

v5.6 Practice Preferences - Printing

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**
- Perform the steps to assign a default printer to different types of documents including labels and letters.
- Set default information—such as a default printer and tray, for printing forms, labels, fee tickets, and letters for your entire practice.

v5.6 Practice Preferences - Provider

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**
- Set up and assign user-defined provider specialties.
- Set default information for providers for your entire practice.

v5.6 Practice Preferences - Reports

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**
- List the different report preferences.
- Describe how they affect the reporting process.

v5.6 Practice Preferences - Tasks

**Time:** 10 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** v5.6 Practice Preferences - Introduction

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

**What You’ll Learn:**
- Set default information for tasks for your practice.
Appointment Scheduling Basics v5.6
This curriculum focuses on familiarizing the student with the Appointment Scheduling process.

v5.6 Appointments - Appointment Scheduling Terms
**Time:** 15 minutes  
**Application Version:** 5.6  
**Prerequisites:** None

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

**What You’ll Learn:**
- Define a resource.
- Define an event.
- Define an event chain.
- Define a category.
- Define a location.

Appointment Scheduling Basics v5.6
This curriculum focuses on familiarizing the student with the Appointment Scheduling process.

v5.6 Appointments - Navigating the Appointment Book
**Time:** 15 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

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

**What You’ll Learn:**
- Name the different parts of the Appointment Book.
- Recall how to use the different Appointment Book views.
- Recognize icons found on the Appointment Book toolbar.

Appointment Scheduling Administration v5.6
This curriculum focuses on setting up Appointment Scheduling.

v5.6 Appointments - Setting up the Appointment Book
**Time:** 60 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

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

**What You’ll Learn:**
- Use Scheduling Administration to set up the basic parts of the Appointment Book-including resources, events, categories, and templates.
- Choose Practice Preferences options to set up scheduling preferences.
- Use Scheduling Preferences to customize how you work with and view certain aspects of the Appointment Book.
v5.6 Appointments - Setting Up the Appointment Wait List

**Time:** 30 minutes  
**Application Version:** 5.6  
**Prerequisites:** None

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

**What You’ll Learn:**
- Describe how a patient is added to the Wait List-how to view, modify, and delete items on the Wait List and how to process Wait List items.
- Identify how to set up defaults for the Wait List process and the real-time Wait List process.

EPM Application Basics v5.6

This curriculum focuses on the EPM application desktop menus and toolbars, along with shortcuts that can be used to access application functions.

v5.6 EPM - Navigating the Application Desktop

**Time:** 15 minutes  
**Application Version:** 5.6  
**Prerequisites:** None

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

**What You’ll Learn:**
- Define components of the desktop in order to navigate the EPM application easily and efficiently.

v5.6 EPM - Common Buttons Fields and Features

**Time:** 20 minutes  
**Application Version:** 5.6  
**Prerequisites:** None

This course is designed to provide an overview of the common buttons-fields, and features found in the Enterprise Practice Management (EPM) application.

**What You’ll Learn:**
- Identify and use the common buttons and standard features within the EPM application.
- Customize a display to suit your needs.

EPM User Preferences - Appointment Scheduling v5.6

This curriculum focuses on the Appointment Scheduling User Preferences.

v5.6 EPM User Preferences - Scheduling

**Time:** 45 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

This course covers the steps necessary to set up user preferences for the Electronic Practice Management (EPM) appointment book.

**What You’ll Learn:**
- Define the EPM Scheduling User preferences as they apply to the NextGen Enterprise Practice Management (EPM) application.
- Customize EPM Scheduling User Preferences to enable you to be more efficient when scheduling patients.
EPM User Preferences v5.6
This curriculum covers setting up and controlling access to the general user preferences that give the individual user options for designating how items look and respond in the NextGen EPM application.

v5.6 EPM User Preferences - General

Time: 30 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 EPM - Navigating the Application Desktop

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

What You’ll Learn:
• Define the EPM General User Preferences as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Customize EPM General User Preferences to enable you to be more efficient.

v5.6 EPM User Preferences - Administration

Time: 45 minutes
Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Define the EPM User Preferences Administration as it applies to the NextGen Enterprise Practice Management (EPM) application.
• Create Default User Preferences in the File Maintenance application.
• Assign Default User Preferences to a group or individual in the System Administrator application.
• Modify a group's permission to set User Preferences.

EPM Demographics - Working with Demographic Information v5.6
This curriculum focuses on familiarizing the learner with how to locate a person's record in the EPM application along with how to add and update their demographic information.

v5.6 Demographics - Person Records vs. Patient Charts

Time: 15 minutes
Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Describe the difference between a Person record and a Patient chart.
• Access patient-related demographic data within the NextGen application.

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

Time: 20 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: None

The purpose of this course is to familiarize the student with the components of the People Lookup and the Patient Lookup windows.
What You’ll Learn:
• Access the People and Patient Lookup windows.
• Define the components of the People and Patient Lookup windows.

v5.6 Demographics - Adding a New Demographic Record

Time: 15 minutes  
Prerequisites: None  
Application Version: 5.6-5.6 SP1

The purpose of this course is to instruct the student how to add a new person's demographic information to the Master Person Index (MPI).

What You’ll Learn:
• Add a new person to the Master Person Index (MPI).
• Define the components of the Patient Information window.

v5.6 Demographics - Overview of the Patient Information Window

Time: 20 minutes  
Prerequisites: None  
Application Version: 5.6-5.6 SP1

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

What You’ll Learn:
• Access the Patient Information window.
• Define the components of the Patient Information window.

v5.6 Demographics - Overview of the Patient Chart

Time: 40 minutes  
Prerequisites: None  
Application Version: 5.6

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

What You’ll Learn:
• Discuss the use of the Person / Patient Information window.
• List the tabs found on the Person / Patient Information window.
• Identify the types of information stored on each tab.
• Add a person to the database who is not a patient.
• Update existing patient demographics.

EPM Appointments - Scheduling Appointments v5.6

This curriculum focuses on the basics of Appointment Scheduling in the EPM application.

v5.6 Appointments - Scheduling Appointments

Time: 90 minutes  
Prerequisites: None  
Application Version: 5.6-5.6 SP1

This course covers how to set-edit, copy, or reschedule appointments, as well as how to create recurring appointments.

What You’ll Learn:
• Work with the Add/Edit Appointment window.
• Add-edit, reschedule, cancel and delete appointments.
• Work with recurring appointments.
• Work with the Appointment List icon and Scheduling reports.
v5.6 Appointments - Printing a Fee Ticket on Demand

Time: 15 minutes  
Application Version: 5.6  
Prerequisites: None

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

What You’ll Learn:
• State the different areas of the EPM application from which you can print a demand fee ticket.  
• Print a demand fee ticket for an appointment.  
• Print a demand fee ticket for an encounter.

v5.6 Appointments - Working with the Appointment Waitlist

Time: 30 minutes  
Application Version: 5.6  
Prerequisites: None

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

What You’ll Learn:
• Add a patient to the Wait List by creating a wait-list item.  
• List ways to access wait-list items—make changes to them, and delete older ones.  
• List ways to process wait-list items.

EPM Appointment Follow-up - End User v5.6

This curriculum focuses on the Appointment Scheduling functions of the EPM application intended to aid with scheduling and reminding patients of return and follow-up appointments.

v5.6 Appointment Followup - Overview

Time: 20 minutes  
Application Version: 5.6-5.6 SP1  
Prerequisites: None

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

What You’ll Learn:
• List the functions to use in the appointment follow-up process.  
• Recall how to use each function.

v5.6 Appointment Followup - Working with Appointment Reminders

Time: 30 minutes  
Application Version: 5.6  
Prerequisites: None

This course covers how to use the Appointment Reminder function of the Enterprise Practice Management (EPM) application to remind patients of upcoming appointments.

What You’ll Learn:
• Print Appointment Reminder letters on-demand.  
• Print Appointment Reminder letters in a batch.  
• Print Mailing Labels in a batch.
v5.6 Appointment Followup - Working with Recall Plans

Time: 30 minutes  
Application Version: 5.6  
Prerequisites: None  

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

What You’ll Learn:
• Add a patient to a Recall Plan from various areas of the EPM application.
• Print Recall Plan letters on demand and in a batch.
• View tasks generated from Recall Plans.
• Run and "work" the Recall report.

EPM Appointment Follow-up - Administration v5.6

This curriculum focuses on setting up features intended to aid with scheduling and reminding patients of return and follow-up appointments.

v5.6 Appointment Followup - Overview

Time: 20 minutes  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  

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

What You’ll Learn:
• List the functions to use in the appointment follow-up process.
• Recall how to use each function.

v5.6 Appointment Followup - Appointment Reminders Setup

Time: 45 minutes  
Application Version: 5.6  
Prerequisites: None  

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

What You’ll Learn:
• Create custom appointment reminder letters and mailing labels that incorporate personalized data from the database.
• Set up defaults that tell the system when to generate letters.
• Generate appointment letters and labels.

v5.6 Appointment Followup - Recall Plans Setup

Time: 60 minutes  
Application Version: 5.6-5.6 SP1  
Prerequisites: None  

This course covers how to use appointment recall plans.
What You’ll Learn:
• Create a Recall Plan letter and mailing label template.
• Create a Recall Plan.
• Add a patient to a Recall Plan.
• Generate recall letters and labels as a batch or on demand.
• Generate a Recall Plan Report.

v5.6 Appointment Followup - Worklog Task Setup

Time: 60 minutes  Application Version: 5.6-5.6 SP1
Prerequisites: None

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

What You’ll Learn:
• Generate appointment follow-up tasks as a batch based on results from an Appointments Listing report.
• Set up tasks as Appointment Reminders that "autocreate" a task a designated number of days prior to a patient’s appointment date.
• Generate tasks in accordance with the patients’ Recall Plans.

EPM Encounters - Working with Encounters v5.6

This curriculum focuses on familiarizing the learner with creating and working with encounters in the EPM application.

v5.6 Encounters - Overview of Encounters

Time: 15 minutes  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Identify the use of an encounter in the NextGen Enterprise Practice Management (EPM) application.

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

Time: 30 minutes  Application Version: 5.6
Prerequisites: None

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

What You’ll Learn:
• Define the components of the Create Encounter and Encounter Maintenance windows.

v5.6 Encounters - Checking in Patients and Creating Encounters

Time: 45 minutes  Application Version: 5.6-5.6 SP1
Prerequisites: None

This course covers checking in and creating encounters for both new and existing patients in the Enterprise Practice Management (EPM) application. You will also learn how to create encounters for patients without appointments.
What You’ll Learn:
• Identify the use of an encounter in the EPM application.
• Define the components of the Create Encounter and Encounter Maintenance windows.
• Access the Checkin / Create Encounter AutoFlow process from the NextGen EPM Appointment Book.
• Complete information on the Create Encounter and Patient Information windows.
• Check in and create encounters for new and existing patients.