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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 EHR CGT education plan will teach you to use the EHR application’s features once they have been set up. This education plan is suitable for any user of the system, and can be paired with a Specialty KBM offering. This education plan is required for anyone attending the CGT classroom training session. The estimated time to complete this education plan is 20 hours.

### EHR Application Basics v5.6

This curriculum focuses on familiarizing the student with the EHR application desktop menus and toolbars, along with shortcuts that can be used to access application functions. In addition, the different ways to configure the appearance of the EMR application desktop are covered.

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

- **Time:** 25 minutes
- **Continuing Education:** CME
- **Prerequisites:** None
- **Application Version:** 5.6-5.6 SP1

This course is intended to familiarize the user with navigating the components of the Electronic Health Records (EHR) application desktop.

**What You’ll Learn:**
- Define the components of the desktop.
- Easily navigate the EHR desktop.

**v5.6 EHR - Keyboard Shortcuts and Application Views**

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

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

**What You’ll Learn:**
- Demonstrate various ways in which to view the EHR application.
- Demonstrate keyboard shortcuts.
- Demonstrate right-click shortcuts.
- Identify common pop-up windows that are used throughout the EHR application.

**v5.6 EHR - Securing Patient Privacy**

- **Time:** 15 minutes
- **Continuing Education:** CME
- **Prerequisites:** None
- **Application Version:** 5.6

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

**What You’ll Learn:**
- Demonstrate the ways used to secure the NextGen EHR application.

### Application Overviews - EHR Only v5.6

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

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

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

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

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What You’ll Learn:
• Describe the architecture of NextGen’s applications.
• Describe how EHR handles workflow—such as scheduling, managed care functionality, charting, and prescription refills.
• Describe how EHR captures patient information.
• Describe ways that EHR exchanges with other systems.
• Describe how EHR provides security and patient privacy.

EHR Medical Records Modules v5.6

This curriculum provides an overview of the NextGen EHR Medical Record Modules. Understanding these functions will help you record vital information gathered or generated during a patient visit.

v5.6 Medical Records Module - Allergies

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

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

What You’ll Learn:
• View an existing allergy.
• Add-modify, resolve, and delete an allergy.
• View allergy-drug interaction information.

v5.6 Medical Records Module - Documents

Time: 15 minutes	Continuing Education: CME
Prerequisites: None	Application Version: 5.6

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

What You’ll Learn:
• Generate a medical document based on an associated template.
• Save and print out a medical document.

v5.6 Medical Records Module - Images

Time: 90 minutes	Continuing Education: CME
Prerequisites: None	Application Version: 5.6

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

What You’ll Learn:
• View images in the Images Module.
• Use the image toolbars to illustrate and modify an image and create annotations for the image.
• Create and use user-defined image sets and image toolbars.
• Create and use user-defined boilerplates.
• Access EHR tasks and ICS Quicknotes.

v5.6 Medical Records Module - Medications

Time: 90 minutes	Continuing Education: CME
Prerequisites: None	Application Version: 5.6-5.6 SP1

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
This course covers how to use the Medications Module in the Electronic Health Records (EHR) application.

What You’ll Learn:
• Set up your preferred windows layout in the Medications Module.
• Set up your preferred view for prescribed medications.
• Search for a specific medication.
• Set up your favorite medications lists.
• Prescribe-update, delete, and renew medications.

v5.6 Medical Records Module - Problems

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

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

What You’ll Learn:
• Use various search methods to search for a problem.
• Add-modify, resolve, and delete a problem.
• Make a resolved problem recur.

v5.6 Medical Records Module - Procedures

Time: 20 minutes  
Continuing Education: CME
Prerequisites: None  
Application Version: 5.6

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

What You’ll Learn:
• Add-update, and delete procedures in the Procedures Module of the Medical Records.
• Add diagnoses and modifiers to the procedures.

v5.6 Medical Records Module - Templates

Time: 25 minutes  
Continuing Education: CME
Prerequisites: None  
Application Version: 5.6

The purpose of this course is to familiarize the student with the basics of templates and data entry using templates in the EHR Medical Records Module.

What You’ll Learn:
• Access a template.
• Define template components.
• Enter data and save a template.

EHR Patient Demographics Module v5.6

This curriculum focuses on modifying and creating new patient demographic and insurance information.

v5.6 EHR - Patient Demographics Module

Time: 20 minutes  
Continuing Education: CME
Prerequisites: None  
Application Version: 5.6

This course covers how to access-create, and modify patient demographic and insurance information using the NextGen Demographic Module in the Electronic Health Records (EHR) application.
What You’ll Learn:
• Access and view patient demographic and insurance coverage.
• Add a new patient or edit an existing patient’s demographic information.
• Add new insurance for a patient or edit a patient’s insurance coverage.

EHR Patient Education Module v5.6
This curriculum focuses on understanding the functionality of the NextGen EHR application’s Patient Education module.

v5.6 EHR - Patient Education Module
Time: 20 minutes Continuing Education: CME
Prerequisites: None Application Version: 5.6
This course covers the Patient Education Module in the EHR. This module is an optional purchase.

What You’ll Learn:
• Access the Patient Education Module.
• Select a Health Advisor.
• Search for educational topics.

EHR Using the Workflow Module v5.6
This curriculum focuses on using the NextGen EHR application’s Workflow module.

v5.6 EHR Workflow Module - Appointments
Time: 15 minutes Continuing Education: None
Prerequisites: None Application Version: 5.6
This course covers viewing and updating patient appointments in Workflow.

What You’ll Learn:
• Access the Workflow Module.
• View appointments.
• Search for appointments.
• Add-update, or delete appointments.
• Set up appointment preferences.

v5.6 EHR Workflow Module - Inbox
Time: 30 minutes Continuing Education: None
Prerequisites: None Application Version: 5.6
This course covers how to work with the e-mail Inbox in Workflow.

What You’ll Learn:
• Access the Workflow Module.
• View e-mail in Inbox.
• Compose new e-mail.
• Respond to e-mail.
• Add e-mail to a patient’s chart.
v5.6 EHR Workflow Module - Tasks

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

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

What You’ll Learn:
- Create tasks on your own Task list.
- Send tasks to other users.
- Respond to tasks sent to you by other users.
- Create preferences for color-coding your tasks.
- Organize your tasks by creating tabs and folders.

EHR Provider Approval Queue Setup v5.6

This curriculum focuses on using the NextGen EHR application’s Provider Approval Queue feature.

v5.6 Provider Approval Queue Setup

Time: 15 minutes  Continuing Education: CME
Prerequisites: None  Application Version: 5.6

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

What You’ll Learn:
- Enable the PAQ in System Administrator.
- Set up sign off items for the PAQ.
- Set up additional Display Options for Items List and Table of Contents.
- Associate a provider and relationship for PAQ users.
- Set up Group Rights for Display Options.

EHR Provider Approval Queue End User v5.6

This curriculum focuses on using the NextGen EHR application’s Provider Approval Queue feature.

v5.6 Provider Approval Queue for End users

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

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

What You’ll Learn:
- Access the Provider Approval Queue (PAQ).
- Review-reject and accept items in the PAQ.
- Add comments to items in the PAQ.
- Send a Workflow Task from the PAQ.

EHR User Preferences v5.6

This curriculum focuses on the NextGen EHR application user preferences.
v5.6 EHR User Preferences - General

Time: 10 minutes  
Continuing Education: CME  
Prerequisites: None  
Application Version: 5.6

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

What You’ll Learn:
• Define the options for Preferences from the General tab.  
• Apply any desired Preferences from the General tab.

v5.6 EHR User Preferences - Documents

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

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

What You’ll Learn:
• Define the options for Preferences from the Documents tab.  
• Apply any desired Preferences from the Documents tab.

v5.6 EHR User Preferences - Formulary

Time: 10 minutes  
Continuing Education: CME  
Prerequisites: None  
Application Version: 5.6

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

What You’ll Learn:
• Define the options for Preferences from the Formulary tab.  
• Apply any desired Preferences from the Formulary tab.

v5.6 EHR User Preferences - Main Toolbar

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

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

What You’ll Learn:
• Define the options for Preferences from the Main Toolbar tab.  
• Apply any desired Preferences from the Main Toolbar tab.

v5.6 EHR User Preferences - Medical Records

Time: 15 minutes  
Continuing Education: CME  
Prerequisites: None  
Application Version: 5.6

This course is intended to familiarize the student with the options available on the Medical Records tab of the EHR user preferences.
**What You’ll Learn:**
- Define the options for Preferences from the Medical Records tab.
- Apply any desired Preferences from the Medical Records tab.

### v5.6 EHR User Preferences - Medications

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<tr>
<th>Time: 30 minutes</th>
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<td><strong>Prerequisites:</strong> None</td>
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This course is intended to familiarize the student with the options available on the Medications tab of the EHR user preferences.

**What You’ll Learn:**
- Define the options for Preferences from the Medications tab.
- Apply any desired Preferences from the Medications tab.

### v5.6 EHR User Preferences - Templates

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

**What You’ll Learn:**
- Define the options for Preferences from the Templates tab.
- Apply any desired Preferences from the Templates tab.

### EHR Working with Encounters v5.6

This curriculum focuses on how to work with encounters in the EMR application.

### v5.6 EHR Main Toolbar - History Toolbar

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<td><strong>Prerequisites:</strong> None</td>
<td><strong>Application Version:</strong> 5.6-5.6 SP1</td>
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This course is intended to familiarize the user with the components of the History Toolbar (also known as the Main Toolbar) in the Electronic Health Records (EHR) Application.

**What You’ll Learn:**
- Identify the components of the EHR History Toolbar.
- Locate the Medical Record modules to enter patient information.

### v5.6 EHR Encounters - Basics

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This course is intended to instruct the student how to create-delete, lock, and unlock encounters in the Electronic Health Records (EHR) application, as well as how to view the encounter properties.
What You’ll Learn:
• Create a new encounter.
• Lock and unlock an encounter.
• Delete an encounter.
• View the encounter-level insurance.
• Change the view of the encounter table of contents.

v5.6 EHR Encounters - Custom and Addendum
Time: 15 minutes  Continuing Education: CME
Prerequisites: None  Application Version: 5.6
This course covers how to use custom encounters and addenda to add information to locked encounters.

What You’ll Learn:
• Create a custom encounter in a patient's chart.
• Create an addendum to an existing patient encounter.
• Lock an encounter.

v5.6 EHR Encounters - Customizing the View
Time: 10 minutes  Continuing Education: CME
Prerequisites: None  Application Version: 5.6
This course is intended to instruct the user how to customize the display options of the main toolbar in the Electronic Health Records (EHR) application.

What You’ll Learn:
• Select the Custom components you want to see in a patient's encounter.
• Change the encounter view from encounter dates to categories.

EHR Encounter Workflows v5.6
This curriculum focuses on familiarizing the learner with the Knowledge Base Model (KBM) templates and typical Electronic Health Records (EHR) encounter workflow.

v5.6 EHR Encounter Workflow
Time: 45 minutes  Continuing Education: CME
Prerequisites: None  Application Version: 5.6-5.6 SP1
This purpose of this course is to familiarize the student with the EHR Encounter Workflow.

What You’ll Learn:
• Discuss the advantages of using NextGen EHR.
• List the types of information easily accessible from the EHR.
• Describe a typical nursing EHR workflow.
• Describe a typical physician EHR workflow.

v5.6 EHR Encounter Workflow - Procedure
Time: 30 minutes  Continuing Education: CME
Prerequisites: None  Application Version: 5.6-5.6 SP1
This course is designed to familiarize you with the basic functions for a procedural encounter in the NextGen EHR (Electronic Health Records) application.
What You’ll Learn:
• Use the EHR for capturing procedures.
• Describe the types of information easily accessible from the EHR.
• Describe the typical nursing EHR procedural encounter workflow.
• Describe the typical physician EHR procedural encounter workflow.

v5.6 EHR Encounter Workflow - Telephone

Time: 30 minutes  
Continuing Education: CME

Prerequisites: None  
Application Version: 5.6-5.6 SP1

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

What You’ll Learn:
• Complete a telephone encounter using the NextGen EHR.
• Document a typical telephone encounter.
• Respond to a telephone encounter.

EHR Template Editor v5.6

This curriculum focuses on familiarizing the learner with how to create and work with templates with the EHR Template Editor.

v5.6 Template Editor - Working with Templates

Time: 45 minutes  
Continuing Education: None

Prerequisites: None  
Application Version: 5.6-5.6 SP1

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

What You’ll Learn:
• Choose an appropriate template type to create a new template.
• Copy an existing template.
• Set up template properties.
• Delete a template.

v5.6 Template Editor - Menu Bar and Toolbars

Time: 60 minutes  
Continuing Education: None

Prerequisites: None  
Application Version: 5.6-5.6 SP1

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

What You’ll Learn:
• Recall the function and operation of each of the menu options available in the Template Editor.
• Recall the function and operation of each of the toolbar buttons available in the Template Editor.
• Demonstrate the use of each of the Layout toolbar buttons.
• Interpret the information found on the status bar.
• Set up the User Preferences.
v5.6 Template Editor - Tools Menu

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

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

What You’ll Learn:
- Use the Template Edit Log to view the status of a template and delete a template from the Template Edit Log when needed.
- Update Template Links.
- Add-edit, disable, and enable a Template Set.
- Assign a Template Set to a Practice.

v5.6 Template Editor - Adding Fields to a Template

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

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

What You’ll Learn:
- Choose appropriate buttons on the Fields toolbar to create fields on the template.
- Add fields to a template.
- Set up properties for the fields.

v5.5 Template Editor - Basic Triggers

Time: 60 minutes  
Continuing Education: None
Prerequisites: None  
Application Version: 5.5

This course covers how to set up basic trigger on templates using the NextGen Template Editor.

What You’ll Learn:
- Access the Triggers window.
- Select an Event and Action for a trigger.
- Create the following basic triggers: Assign Field Value Picklist-Pop-up Number Pad and Calendar, Show/Hide, Goto Field, Launch Template/Document.

Template Import/Export Utility v5.6

This curriculum focuses on the Template Import / Export Utility.

v5.6 Template Import/Export Utility

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

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

What You’ll Learn:
- Access the Template/Import Export Utility.
- Export a template from a NextGen database.
- Import a Template into a NextGen database.
- Set options for the Template Import/Export Utility.
EHR Document Builder v5.6

This curriculum focuses on familiarizing the learner with the Document Builder feature of the EHR application.

v5.6 EHR Document Builder - Basics

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

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

What You’ll Learn:
• Open an existing document and create a new document.
• Define the components of the Document Builder.
• Format a document to meet your practice needs.

v5.6 EHR Document Builder - Basic Macros

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

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

What You’ll Learn:
• Define Macro Types.
• Define the components of the Macro Editor.

v5.6 EHR Document Builder - Import Export Utility

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

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

What You’ll Learn:
• Identify the requirements for usage of the Document Import/Export Utility.
• Export a document.
• Import a document.
• Identify possible errors/conflicts and ways to resolve them.

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

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

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

What You’ll Learn:
• Insert an image-a macro, and a Begin/End section into a document.
• Define a Macro.
• Compile a document.