5.7 Education Plan Guide >> EHR Core Group Training (CGT)
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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 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 Completed Training page of your eLearning account. In the Learning Center, a course is represented by a red book. In this document, course titles appear in blue.

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. In this document, curriculum titles appear in black. If a course is part of a curriculum, it will appear below the curriculum title.

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, “Continuing Education: CME”.

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.
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>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.7 Introduction to the EHR</td>
<td>3</td>
</tr>
<tr>
<td>EHR Medical Records Modules 5.7</td>
<td>3</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Allergies</td>
<td>3</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Documents</td>
<td>3</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Images</td>
<td>3</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Medications</td>
<td>4</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Problems</td>
<td>4</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Procedures</td>
<td>4</td>
</tr>
<tr>
<td>5.7 Medical Records Module - Templates</td>
<td>5</td>
</tr>
<tr>
<td>This course does not appear in a curriculum.</td>
<td>5</td>
</tr>
<tr>
<td>5.7 Patient Demographics Module</td>
<td>5</td>
</tr>
<tr>
<td>EHR Patient Education Module 5.7</td>
<td>5</td>
</tr>
<tr>
<td>5.7 Patient Education Module</td>
<td>5</td>
</tr>
<tr>
<td>5.7 Patient Education Setup</td>
<td>5</td>
</tr>
<tr>
<td>5.7 EHR Workflow Module - Appointments</td>
<td>6</td>
</tr>
<tr>
<td>5.7 EHR Workflow Module - Inbox</td>
<td>6</td>
</tr>
<tr>
<td>5.7 EHR Workflow Module - Tasks</td>
<td>6</td>
</tr>
<tr>
<td>These courses do not appear in a curriculum.</td>
<td>7</td>
</tr>
<tr>
<td>5.7 Provider Approval Queue Setup</td>
<td>7</td>
</tr>
<tr>
<td>5.7 Provider Approval Queue for End Users</td>
<td>7</td>
</tr>
<tr>
<td>EHR Application Basics 5.7</td>
<td>7</td>
</tr>
<tr>
<td>5.7 EHR - Navigating the Application Desktop</td>
<td>7</td>
</tr>
<tr>
<td>5.7 EHR - Keyboard Shortcuts and Application Views</td>
<td>7</td>
</tr>
<tr>
<td>5.7 EHR - Securing Patient Privacy</td>
<td>8</td>
</tr>
<tr>
<td>EHR User Preferences 5.7</td>
<td>8</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - General</td>
<td>8</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Documents</td>
<td>8</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Formulary</td>
<td>9</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Main Toolbar</td>
<td>9</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Medical Records</td>
<td>9</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Medications</td>
<td>9</td>
</tr>
<tr>
<td>5.7 EHR User Preferences - Templates</td>
<td>10</td>
</tr>
<tr>
<td>EHR Working with Encounters 5.7</td>
<td>10</td>
</tr>
<tr>
<td>5.7 EHR - Main Toolbar / History Toolbar</td>
<td>10</td>
</tr>
<tr>
<td>5.7 EHR Encounters - Basics</td>
<td>10</td>
</tr>
<tr>
<td>5.7 EHR Encounters - Custom and Addendum</td>
<td>11</td>
</tr>
<tr>
<td>5.7 EHR Encounters - Customizing the View</td>
<td>11</td>
</tr>
<tr>
<td>EHR Encounter Workflows 5.7</td>
<td>11</td>
</tr>
</tbody>
</table>

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# Table of Contents

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

- v5.6 EHR Encounter Workflow .......................... 11
- 5.7 EHR Encounter Workflow - Procedure .......................... 11
- 5.7 EHR Encounter Workflow - Telephone .......................... 12

**EHR Template Editor 5.7** ........................................ 12
- 5.7 Template Editor - Working With Templates .......................... 12
- 5.7 Template Editor - Menu Bar and Toolbars .......................... 12
- 5.7 Template Editor - Tools Menu .......................... 13
- 5.7 Template Editor - Adding Fields to a Template .......................... 13
- 5.7 Template Editor - Basic Triggers Part One .......................... 13
- 5.7 Template Editor - Basic Triggers Part Two .......................... 13

This course does not appear in a curriculum. ........................................ 14
- 5.7 Template Import/Export Utility .......................... 14

**EHR Document Builder 5.7** ........................................ 14
- 5.7 Document Builder - Overview .......................... 14
- 5.7 Document Builder - Setup .......................... 14
- 5.7 Document Builder - Working with the Document Builder .......................... 15
- 5.7 Document Builder - Basic Macros .......................... 15
- 5.7 Document Builder - Import Export Wizard .......................... 15
5.7 EHR CGT Education Plan Guide

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.

5.7 Introduction to the EHR

Time: 30 minutes  
Continuing Education: None  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course covers the basics of the NextGen Electronic Health Record (EHR) application.

What You’ll Learn:
• Describe the components of the EHR application.  
• Describe how EHR captures patient information using the modules within the History toolbar.

EHR Medical Records Modules 5.7

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. It includes the following NextGen Learning Center online courses.

5.7 Medical Records Module - Allergies

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course will teach you how to work with the Allergies 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.

5.7 Medical Records Module - Documents

Time: 15 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

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

What You’ll Learn:
• Generate a medical document.  
• Save, print, and fax a medical document.  
• View and restore an archived document.  
• Sign off a document and add an addendum to the signed off document.

5.7 Medical Records Module - Images

Time: 60 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

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This course will teach you how to work with the Images module in the Electronic Health Records (EHR) application.

**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.

### 5.7 Medical Records Module - Medications

**Time:** 90 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None

This course will teach you how to work with 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.

### 5.7 Medical Records Module - Problems

**Time:** 20 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None

This course will teach you how to work with the Problems module in the Electronic Health Records (EHR) application.

**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.

### 5.7 Medical Records Module - Procedures

**Time:** 15 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None

This course will teach you 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
5.7 Medical Records Module - Templates

**Time:** 15 minutes

**Product:** EHR

**Continuing Education:** CME

**Application Version:** 5.7

**Prerequisites:** None

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

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

This course does not appear in a curriculum.

5.7 Patient Demographics Module

**Time:** 30 minutes

**Product:** EHR

**Continuing Education:** CME

**Application Version:** 5.7

**Prerequisites:** None

This course covers how to add new patient demographic data and update/edit existing patient demographic data using the Patient Demographic module.

**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 5.7

This curriculum focuses on understanding the functionality of the NextGen EHR application’s Patient Education module. It includes the following NextGen Learning Center online course:

5.7 Patient Education Module

**Time:** 15 minutes

**Product:** EHR

**Continuing Education:** CME

**Application Version:** 5.7

**Prerequisites:** None

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

**What You’ll Learn:**
- Access the Patient Education Module.
- Search for Patient Education topics.
- Print Patient Education topics.

5.7 Patient Education Setup

**Time:** 20 minutes

**Product:** EHR-System Administrator-File Maintenance

**Continuing Education:** None

**Application Version:** 5.7

**Prerequisites:** None

This course covers how to set up and install the Healthwise Patient Education Module.
What You’ll Learn:
• Perform the necessary setup steps prior to installing the Patient Education content.
• Install the Patient Education content using the Install Wizard.
• Use the Document Mapping tool to map patient education triggers to the appropriate documents.
• Set up Bad Debt Statuses

5.7 EHR Workflow Module - Appointments

Time: 15 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.7
Prerequisites: None

This course covers how to utilize the appointment component in the Workflow Module.

What You’ll Learn:
• Open the Workflow module.
• View appointments.
• Modify appointments.
• Set up appointment preferences.
• Access a patient's chart from the appointment window.

5.7 EHR Workflow Module - Inbox

Time: 15 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.7
Prerequisites: None

This course covers how to utilize the Inbox component in the Workflow Module.

What You’ll Learn:
• Open the Workflow module.
• View emails.
• Task an email.
• Set up Inbox preferences.
• Add an email to a patient’s chart.

5.7 EHR Workflow Module - Tasks

Time: 30 minutes  Continuing Education: CME
Product: EHR  Application Version: 5.7
Prerequisites: None

This course covers how to utilize the Task component in the Workflow Module.

What You’ll Learn:
• Open the Workflow module.
• Create and assign tasks.
• Accept and complete tasks.
• Attach components to tasks.
These courses do not appear in a curriculum.

5.7 Provider Approval Queue Setup

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course covers the steps necessary to set up the PAQ for end users in the System Administrator.

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.

5.7 Provider Approval Queue for End Users

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

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

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

EHR Application Basics 5.7

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 EHR application.

5.7 EHR - Navigating the Application Desktop

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

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

What You’ll Learn:
- Define the components of the desktop.
- Navigate the EHR desktop.

5.7 EHR - Keyboard Shortcuts and Application Views

Time: 30 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None
This course covers the different ways to view the 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.

### 5.7 EHR - Securing Patient Privacy

**Time:** 15 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None

This course covers how to secure the EHR from unauthorized users during an encounter.

**What You’ll Learn:**
- Secure the NextGen EHR application without closing out the patient or encounter.
- Re-open the application, returning to the current patient and encounter.

### EHR User Preferences 5.7

This curriculum focuses on the NextGen EHR application user preferences. It includes the following courses:

#### 5.7 EHR User Preferences - General

**Time:** 15 minutes  
**Continuing Education:** CME  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:** None

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

**What You’ll Learn:**
- Access User Preferences.
- Set General user preferences that apply to: Patient Selection, Synchronization Settings, Knowledgebase, Notifications, Initial Module, Orders, and Logout Options.
- Set up Collection Agencies
- Set up Bad Debt Statuses

#### 5.7 EHR User Preferences - Documents

**Time:** 10 minutes  
**Continuing Education:** CME  
**Product:** NextGen EHR  
**Application Version:** 5.7  
**Prerequisites:** None

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

**What You’ll Learn:**
- Access User Preferences in the NextGen EHR application.
- Set Documents user preferences that apply to: Machine Settings, Generating Settings, User Settings.
- Set up Collection Agencies
- Set up Bad Debt Statuses

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5.7 EHR User Preferences - Formulary

Time: 10 minutes  
Continuing Education: CME  
Product: NextGen EHR  
Application Version: 5.7  
Prerequisites: None

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

What You’ll Learn:
- Access User Preferences.
- Set Formulary user preferences that apply to: General options, View options, Drug Information, and Formulary Status.
- Set up Collection Agencies
- Set up Bad Debt Statuses

5.7 EHR User Preferences - Main Toolbar

Time: 10 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course covers how to set up user-specific preference settings on the Main Toolbar tab in Preferences in the NextGen EHR application.

What You’ll Learn:
- Access User Preferences.
- Set Main Toolbar user preferences that apply to: General Settings, Patient’s Encounters, NextGen ICS Images, and XML Documents.
- Set up Collection Agencies
- Set up Bad Debt Statuses

5.7 EHR User Preferences - Medical Records

Time: 10 minutes  
Continuing Education: CME  
Product: NextGen EHR  
Application Version: 5.7  
Prerequisites: None

This course covers how to set up user-specific preference settings on the Medical Records tab in Preferences in the NextGen EHR application.

What You’ll Learn:
- Access User Preferences in the NextGen EHR application.
- Set Medical Records user preferences that apply to Location and Provider.
- Set up Collection Agencies
- Set up Bad Debt Statuses

5.7 EHR User Preferences - Medications

Time: 10 minutes  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course teaches you how to set up user-specific preference settings on the Medications tab in Preferences in the NextGen EHR application.
What You’ll Learn:
• Access User Preferences in the NextGen EHR application.
• Set Medication user preferences that apply to Printing and Faxing, View options, External Drug Reference Site, and Sig.
• Set up Collection Agencies
• Set up Bad Debt Statuses

5.7 EHR User Preferences - Templates

Time: 10 minutes Continuing Education: CME
Product: EHR Application Version: 5.7
Prerequisites: None

This course teaches you how to set up user-specific preference settings on the Templates tab in Preferences in the Next-Gen EHR application.

What You’ll Learn:
• Access User Preferences in the NextGen EHR application.
• Set Templates user preferences that apply to Preferred Templates, Default Template, and Appearance: 3D Look.
• Set up Collection Agencies
• Set up Bad Debt Statuses

EHR Working with Encounters 5.7

This curriculum focuses on how to work with encounters in the EMR application. It includes the following courses:

5.7 EHR - Main Toolbar / History Toolbar

Time: 30 minutes Continuing Education: None
Product: EHR Application Version: 5.7
Prerequisites: None

This course covers the components, links, and functions of the History Toolbar.

What You’ll Learn:
• Demonstrate the two ways to open and close the toolbar.
• Identify the six sections of the toolbar.
• Create a new encounter.
• Set your preferred/customized encounter view.
• Lock and unlock an encounter.

5.7 EHR Encounters - Basics

Time: 15 minutes Continuing Education: CME
Product: EHR Application Version: 5.7
Prerequisites: None

This course covers how to create, lock, unlock, and delete an encounter, 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.
5.7 EHR Encounters - Custom and Addendum

Time: 15 minutes  
Product: EHR  
Prerequisites: None

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

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

5.7 EHR Encounters - Customizing the View

Time: 15 minutes  
Product: EHR  
Prerequisites: None

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

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 5.7

This curriculum focuses on familiarizing the learner with the Knowledge Base Model (KBM) templates and typical Electronic Health Records (EHR) encounter workflow. It includes the following online courses:

v5.6 EHR Encounter Workflow

Time: 45 minutes  
Product: EHR  
Prerequisites: None

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.

5.7 EHR Encounter Workflow - Procedure

Time: 15 minutes  
Product: EHR  
Prerequisites: None

This course covers the basic functionality regarding capturing Procedure encounters in the NextGen EHR (Electronic Health Records) application.
What You’ll Learn:
• Open the Procedure template.
• Create a Patient Consent form.
• Document a procedure using one of the Procedural popup wizards.
• List the elements of the Four Point Check.

5.7 EHR Encounter Workflow - Telephone

Time: 15 minutes
Product: EHR
Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Perform the steps of a typical telephone encounter workflow.
• Create and assign a task to a co-worker, and be able to accept a task assigned to you.
• Review the patient telephone communication history.
• Generate a written history of the encounter.

EHR Template Editor 5.7

This curriculum focuses on familiarizing the learner with how to create and work with templates with the EHR Template Editor. It includes the following courses:

5.7 Template Editor - Working With Templates

Time: 45 minutes
Product: EHR
Application Version: 5.7
Prerequisites: None

This course covers how to create and work with templates in NextGen EHR to better meet your practice needs.

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.
• Use the User Workspace and Template Snippet to quickly build other templates.

5.7 Template Editor - Menu Bar and Toolbars

Time: 30 minutes
Product: Template Editor
Application Version: 5.7
Prerequisites: None

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.

What You’ll Learn:
• Describe the function and operation of each of the menu options available in the Template Editor.
• Describe 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.

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5.7 Template Editor - Tools Menu

Time: 45 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None

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.

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.
• Set up the User Preferences for Template Editor.
• Use the Auto Check Triggers option to check trigger syntax for a single template or multiple templates.

5.7 Template Editor - Adding Fields to a Template

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None

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

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.

5.7 Template Editor - Basic Triggers Part One

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Access the Triggers window.
• Select an Event and Action for a trigger.
• Create Assign Field Value, Assign Note Value, PickList, DBPickList, Show, Hide, Pop-Up, and Template Pop-Up triggers.

5.7 Template Editor - Basic Triggers Part Two

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Select an Event and Action for a trigger.
• Set up the condition for a trigger.
• Create Alert, Goto Field, Goto Module, Launch Template, Launch Document, Toggle Panel, Change Field Color, and Change Field Style triggers.
This course does not appear in a curriculum.

5.7 Template Import/Export Utility

Time: 30 minutes  
Continuing Education: None  
Product: EHR-Template Import/Export  
Application Version: 5.7  
Prerequisites: None

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:
- Move templates between NextGen databases, such as a Test Database and a Production Database.
- Manage template pick lists when templates are imported into a NextGen database.
- Manage active images that are contained within a template when templates are imported into a NextGen database.
- Set up Bad Debt Statuses

EHR Document Builder 5.7

This curriculum focuses on familiarizing the learner with the Document Builder feature of the EHR application. It includes the following courses:

5.7 Document Builder - Overview

Time: 30 minutes  
Continuing Education: None  
Product: EHR-Document Builder  
Application Version: 5.7  
Prerequisites: None

This course will cover the basics of the TX Text Document Builder application.

What You’ll Learn:
- Recognize the icons, buttons, and drop down menus within the Document Builder application.
- Understand the Document Creation/Editing window and its components.
- Identify List View windows.
- Edit Document Preferences and Properties.

5.7 Document Builder - Setup

Time: 15 minutes  
Continuing Education: None  
Product: EHR  
Application Version: 5.7  
Prerequisites: None

This course covers the setup requirements needed in order to properly use the Document Builder TX Text application.

What You’ll Learn:
- Set up the module rights in the System Administration module.
- Set up the operations rights in the System Administration module.
- Set up universal preferences for documents.
- Run the TX Text Document Converter.
- Set up the default document viewers in NextGen EHR Document Preferences.
5.7 Document Builder - Working with the Document Builder

Time: 45 minutes  
Continuing Education: None  
Product: EHR-Document Builder  
Application Version: 5.7  
Prerequisites: None

This course covers how to create a document in the TX Text Document Builder.

What You’ll Learn:
- Create a new Document.
- Insert macros, headers, footers, and other components into a document.
- Apply formatting to a document.
- Revise, rename or delete existing documents.

5.7 Document Builder - Basic Macros

Time: 30 minutes  
Continuing Education: None  
Product: Document Builder  
Application Version: 5.7  
Prerequisites: None

This course covers the basics of creating macros in the Tx Text Document Builder application.

What You’ll Learn:
- Describe what a macro is, as well as the types of macros.
- Create a Standard, Summary, and File Maintenance Macro.

5.7 Document Builder - Import Export Wizard

Time: 15 minutes  
Continuing Education: None  
Product: EHR-Document Builder  
Application Version: 5.7  
Prerequisites: None

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

What You’ll Learn:
- Access the Import/Export Wizard and describe its features.
- Import a document to a NextGen database.
- Export a document from a NextGen database.
- Use the SetDB application to change databases.