5.7 Education Plan Guide >> EHR Definition Workshop (DWS)
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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.

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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.

Getting Started Setting Up NextGen 5.7

This curriculum focuses on how to set up access for the NextGen applications and databases. It includes the following NextGen Learning Center online courses:

5.7 Application Launcher

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

This course covers how to navigate through the Application Launcher that is used to access the NextGen applications.

What You’ll Learn:  
• Quickly and easily access NextGen applications.  
• Use a common menu for launching NextGen applications that is universal throughout your organization.  
• Customize your desktop or NextGen menu with desired applications.  
• Use the authentication process which allows for a single sign on for all NextGen applications.

5.7 SetDB Application

Time: 15 minutes  
Continuing Education: None  
Product: EPM-EHR-SetDB  
Application Version: 5.7  
Prerequisites: 5.7 Application Launcher

This course covers how to use the SetDB application.

What You’ll Learn:  
• Describe the purpose of the SetDB application.  
• List the different NextGen databases.  
• Identify how the databases are used.  
• Switch between the NextGen databases using the SetDB application.
5.7 License Manager

Time: 15 minutes  
Product: License Manager  
Prerequisites: None

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

**What You’ll Learn:**
- Access the License Manager application.
- View license information for the available NextGen products.
- Apply a new license key for a NextGen product.

This course does not appear in a curriculum.

5.7 Overview of File Maintenance

Time: 45 minutes  
Product: File Maintenance  
Prerequisites: None

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

**What You’ll Learn:**
- Describe the main purposes of the File Maintenance application.
- Access the File Maintenance application.
- Identify the main features of the File Maintenance application.
- Describe the Code Tables, Master List, Master Files, and Libraries and their main functions.
- Customize your NextGen applications by setting up the data in the File Maintenance application.

Introduction to NextGen Organizational Levels 5.7

This curriculum focuses on setting up the various organizational levels of the NextGen applications. It includes the following NextGen Learning Center online courses:

5.7 Determining and Assigning Organizational Levels

Time: 30 minutes  
Product: File Maintenance-System Administrator  
Prerequisites: None

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

**What You’ll Learn:**
- Identify the hierarchical order of NextGen organizational levels.
- Decide at which level to share your patient data.

5.7 System Master Files - Enterprises

Time: 20 minutes  
Product: File Maintenance  
Prerequisites: None

This course covers how to set up the System Level Master File - Enterprises in the File Maintenance application.
What You’ll Learn:
- Define an Enterprise as it applies to NextGen applications.
- Identify and collect the information needed to set up an Enterprise.
- Create and modify Enterprises in the File Maintenance application.

5.7 System Master Files - Practices

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This course covers how to set up the System Level Master File - Practices in the File Maintenance application.

What You’ll Learn:
- Define a Practice as it applies to NextGen applications.
- Identify and collect the information needed to set up a Practice.
- Create and modify Practices in the File Maintenance application.

5.7 System Master Files - Locations

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

What You’ll Learn:
- Define a Location as it applies to the NextGen applications.
- Identify and collect the information needed to set up Locations, whether as a service location or a facility.
- Create and modify Locations in the File Maintenance application.

Setting Up System Security 5.7

This curriculum focuses on setting up application users and other security options. It includes the following NextGen Learning Center online courses:

5.7 Security - Creating and Managing User Groups

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This course covers setting up and modifying User Groups within the System Administrator application.

What You’ll Learn:
- Define the concept of User Groups.
- Create, modify, and delete user groups.
- Add existing user groups from other practices.

5.7 Security - Creating and Managing Users

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This course covers setting up and modifying Users within 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.

5.7 Security - Rights and Permissions
Time: 20 minutes
Product: EPM-EHR-System Administrator
Prerequisites: None

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

What You’ll Learn:
• Assign rights and permissions for Modules and Operations.
• Import and export rights and permissions from one Group to another.

5.7 Security - Password Requirements for Users
Time: 15 minutes
Product: System Administrator
Prerequisites: None

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

What You’ll Learn:
• Understand the need for secure passwords.
• Identify guidelines for creating secure passwords.
• Determine and assign password requirements to establish secure user sign on.

5.7 Security - Patient Sharing
Time: 30 minutes
Product: EPM-EHR-System Administrator
Prerequisites: None

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

What You’ll Learn:
• Set up patient Inclusion and Exclusion lists at the User level.
• Set up patient Inclusion and Exclusion lists at the Practice level.
• Access Inclusion lists from the Patient Lookup window in EHR.

5.7 Security - Preferred Locations
Time: 30 minutes
Product: EPM-EHR-System Administrator
Prerequisites: None

This course covers how to segregate different locations that work autonomously within a practice so as to not allow users to view or enter data (encounters, etc.) for non-specified locations.
What You’ll Learn:
• Configure user-level Preferred Location security.
• Create Default User Preferences - Locations practice master files and apply them to users and security groups.
• Allow users to further limit their preferred locations through User Preferences.
• Restrict user-level non-preferred location permission settings.

This course is not in a curriculum.

v5.6 Master Lists
Time: 30 minutes  Continuing Education: None
Product: EPM-File Maintenance  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".

Setting Up System Master Files - EHR 5.7

This curriculum focuses on setting up the System Master Files used by NextGen EHR using the File Maintenance application. This curriculum includes courses covering the following NextGen System Master Files:

v5.6 System Master Files - Introduction
Time: 10 minutes  Continuing Education: None
Product: EPM-EHR-File Maintenance  Application Version: 5.6-5.6 SP1
Prerequisites: None

This course will introduce you to the NextGen System Master Files found in File Maintenance.

What You’ll Learn:
• Understand the use of System Master Files.
• View System Master Files by application.
• Understand the components of a System Master File.
• Know the security rights that affect System Master Files.

5.7 System Master Files - Allergies and Allergy Reactions
Time: 20 minutes  Continuing Education: None
Product: EHR-File Maintenance  Application Version: 5.7
Prerequisites: None

This course covers how to set up system level master files for allergies and allergy reactions in the File Maintenance application.
What You’ll Learn:
• Define an Allergy and Allergy Reaction as they apply to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up User Defined Allergies and Allergy Reactions that are not already part of the EHR application.
• Create and modify User Defined Allergies and Allergy Reactions in the File Maintenance application.

5.7 System Master Files - Counters

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

This course covers how to access the Counters System Master File to set counters for various records.

What You’ll Learn:
• Explain how Counters are used in the NextGen applications.
• Access the Counters System Master File to set Counters for the various records.
• Grant access to Counters System Master File from the System Administrator application.

5.7 System Master Files - CPT4 Codes

Time: 20 minutes  Continuing Education: None
Product: File Maintenance  Application Version: 5.7
Prerequisites: None

This course covers how to set up the System level Master File for CPT4 Codes in the File Maintenance application.

What You’ll Learn:
• Define a CPT4 Code as it applies to the NextGen applications.
• Identify and collect the information needed to set up CPT4 Codes.
• Create, modify, and hide CPT4 Codes in the File Maintenance application.

5.7 System Master Files - DB Picklist Manager

Time: 20 minutes  Continuing Education: None
Product: EHR-File Maintenance  Application Version: 5.7
Prerequisites: None

In this course, you will learn how to set up System Level Master File DB Picklist Manager in the File Maintenance Application.

What You’ll Learn:
• Define DB Picklist Manager as it applies to the Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up the DB Picklist Manager.
• Create and modify DB Picklists in the File Maintenance application.

5.7 System Master Files - Diagnosis Codes

Time: 20 minutes  Continuing Education: None
Product: EHR-File Maintenance  Application Version: 5.7
Prerequisites: None

In this course, you will learn how to set up the Diagnosis Categories, Severities, and Statuses System Master Files in the File Maintenance application.
What You’ll Learn:
• Create and modify Diagnosis Categories, Severities, and Statuses.
• Know how the Diagnosis Category, Severity, and Statuses are used in the NextGen EHR application.

5.7 System Master Files - Employers

Time: 20 minutes          Continuing Education: None
Product: EPM-EHR-File Maintenance          Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Define an Employer as it applies to the NextGen applications.
• Identify and collect the information needed to set up Employers.
• Create and modify Employers in the File Maintenance application and in the EPM application.

v5.6 System Master Files - Equipment Field Map

Time: 15 minutes          Continuing Education: None
Product: EHR-File Maintenance          Application Version: 5.6-5.6 SP1
Prerequisites: v5.6 System Master Files - Introduction

The purpose of this course is to instruct the student how to set up the Equipment Field Map system level master file in the File Maintenance application.

What You’ll Learn:
• Define Equipment Field Map as it applies to the Next Electronic Health Records (EHR) application.
• View information in the Equipment Field Map System Master File.
• Map the Equipment Fields to the Template Fields.

5.7 System Master Files - External Interface Map

Time: 10 minutes          Continuing Education: None
Product: EHR-File Maintenance          Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Define External Interface Map information as it applies to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up the External Interface Map file.
• Create and modify External Interface Map information in the File Maintenance application.

5.7 System Master Files - ICD9CM Codes

Time: 20 minutes          Continuing Education: None
Product: File Maintenance          Application Version: 5.7
Prerequisites: None

This course covers how to set up the ICD9CM Codes System Master File and use it in the EPM and EHR applications.

What You’ll Learn:
• Define ICD9CM codes as they apply to the NextGen EPM and EHR applications.
• Create and modify ICD9CM codes.
5.7 System Master Files - Medication Tasks

Time: 30 minutes  
Product: EHR-File Maintenance  
Prerequisites: None

This course covers how to set up the Medication Tasks System Master Files and use them in the Medications module of NextGen EHR.

What You’ll Learn:
- View and modify the medication information.
- Add user-defined medications to the Medication List.
- Group medications by a problem or payer.
- Associate medications to a practice interface.
- Work efficiently with the Medications module in the NextGen EHR.

5.7 System Master Files - Modifiers and Modifier Categories

Time: 20 minutes  
Product: File Maintenance  
Prerequisites: None

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

What You’ll Learn:
- Define Modifiers and Modifier Categories as it applies to the NextGen Electronic Health Records (EHR) application.
- Identify and collect the information needed to set up Modifiers and Modifier Categories.
- Access the Modifiers System Master File to set up Modifiers.
- Access the Modifier Categories System Master File to set up categories that group similar Modifiers.

5.7 System Master Files - Order AOE Questions and Answers

Time: 20 minutes  
Product: EHR-File Maintenance  
Prerequisites: v5.6 System Master Files - Introduction

This course covers how to create the Order AOE (Ask at Order Entry) Questions and Order AOE Answers System Master Files to store data used in the Orders module.

What You’ll Learn:
- Set up AOE questions and answers to be used in the Orders module.
- Work efficiently with the Orders module.

5.7 System Master Files - Order NextGen Test Compendium and Favorites

Time: 25 minutes  
Product: EHR-File Maintenance  
Prerequisites: 5.7 SMF – Introduction

This course covers how to set up the System Master Files for Order NextGen Test Compendium and Order Test Favorites.

What You’ll Learn:
- Map a NextGen defined test to lab vendors' tests in the Order NextGen Test Compendium System Master File.
- Set up and modify your favorite test lists in the Order Test Favorites System Master File.
5.7 System Master Files - Order Results Sequences and Notifications

Time: 15 minutes
Product: EHR-File Maintenance
Application Version: 5.7
Prerequisites: v5.6 System Master Files - Introduction

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

What You’ll Learn:
• Set up the sequence in which test components display.
• Set up the users that should be notified of lab results.

5.7 System Master Files - Order Tests and Components

Time: 25 minutes
Product: EHR-File Maintenance
Application Version: 5.7
Prerequisites: v5.6 System Master Files - Introduction

This course covers how to set up the Order Tests and Order Components System Master Files to store data used in the Orders module.

What You’ll Learn:
• Add and modify lab components.
• Manually add and modify lab tests.

5.7 System Master Files - Pharmacies

Time: 15 minutes
Product: File Maintenance
Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Define a Pharmacy as it applies to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up Pharmacies.
• Create and modify Pharmacies in the File Maintenance application.

5.7 System Master Files - Printer Aliases

Time: 15 minutes
Product: File Maintenance
Application Version: 5.7
Prerequisites: None

This course covers how to set up the system level master file Printer Aliases in the File Maintenance Application.

What You’ll Learn:
• Define a Printer Alias as it applies to the NextGen Electronic Health Records (EHR) application.
• Identify and collect the information needed to set up Printer Aliases.
• Add, edit, or delete Printer Aliases in the File Maintenance application.

5.7 System Master Files - Providers

Time: 60 minutes
Product: EPM-EHR-File Maintenance
Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Define a Provider as it applies to NextGen applications.
• State the licensing options for your providers.
• Understand the Providers Master File window.
• Identify and collect the information needed to set up Providers.
• Create and modify Providers.

5.7 System Master Files - Service Categories

Time: 20 minutes  Continuing Education: None
Product: File Maintenance  Application Version: 5.7
Prerequisites: None

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

What You’ll Learn:
• Explain how Service Categories are used in the NextGen applications.
• Identify and collect the information needed to set up Service Categories.
• Create and modify Service Categories in the File Maintenance application.

5.7 System Master Files - Specialties

Time: 15 minutes  Continuing Education: None
Product: EPM-EHR-File Maintenance  Application Version: 5.7
Prerequisites: None

This course covers how to set up the System Level Master File for Specialties in the File Maintenance application.

What You’ll Learn:
• Define Specialties as they apply to the NextGen applications.
• Identify and collect the information needed to set up Specialties.
• Create and modify Specialties in the File Maintenance application.
• Attach a specialty to a rendering provider in the Providers section of the File Maintenance application.

5.7 System Master Files - User Image Descriptions

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

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

What You’ll Learn:
• Define a User Image Description as it applies to the NextGen Electronic Health Record (EHR) application.
• Identify and collect the information needed to set up User Image Descriptions.
• Create and modify User Image Descriptions in the File Maintenance application.

5.7 System Master Files - Vaccine Orders

Time: 15 minutes  Continuing Education: None
Product: EHR-File Maintenance  Application Version: 5.7
Prerequisites: None
This course covers how to set up the Vaccine Orders System Master File in File Maintenance application and how it is used in the EHR application.

**What You’ll Learn:**
- Define a Vaccine Order as it applies to the NextGen EHR application.
- Identify and collect the information needed to set up Vaccine Orders.
- Create and modify Vaccine Orders in the File Maintenance application.

### 5.7 System Master Files - View Categories

**Time:** 20 minutes  
**Continuing Education:** None  
**Product:** File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None

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

**What You’ll Learn:**
- Define a View Category as it applies to the NextGen EHR application.
- Set up the View Categories.
- Create and modify View Categories in the File Maintenance application.

### 5.7 System Master Files - Zip Codes

**Time:** 15 minutes  
**Continuing Education:** None  
**Product:** EPM-EHR-File Maintenance  
**Application Version:** 5.7  
**Prerequisites:** None

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

**What You’ll Learn:**
- Identify and collect the information needed to set up Zip Codes.
- Create and modify Zip Codes in the File Maintenance application.
- Create a zip code "on the fly" in EPM.

### Setting Up System Master Files - Payers 5.7

This curriculum focuses on setting up the Payers System Master File using the File Maintenance application. This curriculum includes the following NextGen Learning Center online courses:

### 5.7 System Master Files - Payers Part One

**Time:** 20 minutes  
**Continuing Education:** None  
**Product:** EPM  
**Application Version:** 5.7  
**Prerequisites:** v5.6 System Master Files - Introduction, 5.7 Overview of Payers System Master File

This course will teach you how to setup the Defaults 1 and 2 Tabs of the Payers System Master File.

**What You’ll Learn:**
- Define a Payer as it applies to NextGen applications.
- State the uses of the Payers Master File.
- Determine how many Payers you will need to set up.
- Understand the Payers Master File window.
- Access and set the Payer Defaults 1 and 2 tabs.
5.7 System Master Files - Payers Part Two

Time: 45 minutes  
Continuing Education: None  
Product: EPM  
Application Version: 5.7  
Prerequisites: v5.6 System Master Files - Introduction; 5.7 System Master File - Payers: Overview; 5.7 System Master File - Payers: Part 1

This course will teach you how to set up the remaining tabs of the Payers System Master File.

What You’ll Learn:
- Access and learn the options on the System, Practice, Alternate Payer, External, Co-pays, and Order Module Tabs and how to set them.

EHR Setting Up Libraries 5.7

This curriculum focuses on setting up Libraries accessed by the EHR application using the File Maintenance application. It includes the following NextGen Learning Center online courses.

5.7 Libraries - Diagnosis Codes

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

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

What You’ll Learn:
- Define a Diagnosis Codes Library as it applies to the NextGen Enterprise Practice Management (EPM) and Electronic Health Records (EHR) applications.
- Identify and collect the information needed to set up a Diagnosis Codes Library.
- Create and modify a Diagnosis Codes Library.

5.7 Libraries - Service Items

Time: 45 minutes  
Continuing Education: None  
Product: EPM-File Maintenance  
Application Version: 5.7  
Prerequisites: None

This course will teach you how to maintain your Service Items Libraries, also known as your fee schedule, so that you can enter charges and order diagnostic procedures.

What You’ll Learn:
- Define a Service Items Library and a Service Item Member.
- Modify an existing Service Items Library.
- Navigate the Service Item Library Maintenance window.

This course does not appear in a curriculum.

5.7 Universal Preferences

Time: 20 minutes  
Continuing Education: None  
Product: System Administrator  
Application Version: 5.7  
Prerequisites: None

This course covers how to identify and modify Universal Preferences.

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What You’ll Learn:
• Access Universal Preferences.
• Review Preference Folders and Value Types.
• Modify Universal Preferences.
• Review User Preferences vs. Universal Preferences.
• Import Preferences from the NextGen.ini file.

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
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
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
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.