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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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The EHR End User education plan will teach you a broad range of specific application tasks for the EHR application. It contains some SCT and some CGT courses, and is suitable for employees who require a general knowledge of the EHR application. The estimated time to complete this education plan is 13 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.

### 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.

### 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

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  
**Product:** EHR  
**Application Version:** 5.7  
**Prerequisites:**

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  
**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.

These courses do not appear in a curriculum.

5.7 Patient Demographics Module

**Time:** 30 minutes  
**Product:** EHR  
**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.

5.7 Patient Education Module

**Time:** 15 minutes  
**Product:** EHR  
**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.
EHR Using the Workflow Module 5.7

This curriculum focuses on using the NextGen EHR application’s Workflow module and includes the following NextGen Learning Center online courses:

5.7 EHR Workflow Module - Appointments

Time: 15 minutes  
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  
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  
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.
This course does not appear in a curriculum

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

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<td>5.7</td>
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<tr>
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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

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<tr>
<td>Prerequisites:</td>
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</table>

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

### 5.7 EHR User Preferences - Formulary

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<td>Prerequisites:</td>
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</tbody>
</table>

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 NextGen EHR application.

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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  
Continuing Education: CME  
Product: EHR  
Application Version: 5.7  
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  
Continuing Education: CME
Product: EHR  
Application Version: 5.7
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  
Continuing Education: CME
Product: EHR  
Application Version: 5.6-5.6 SP1
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  
Continuing Education: CME
Product: EHR  
Application Version: 5.7
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  
Continuing Education: CME
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.