5.7 Education Plan Guide >> Small Practice - EPM Core Group Training (CGT)
Although we have exercised great care in creating this publication, The NextGen Learning Center assumes no responsibility for errors or omissions that may appear in this publication and reserves the right to change this publication at any time without notice.

This document contains information proprietary to NextGen Healthcare® and is protected by copyright. No part of this document may be reproduced or transmitted in any form by any means, incorporated into any information retrieval system for any purpose, translated to another language, or redistributed to anyone other than licensed users without prior, written consent of NextGen Healthcare.
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.

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
# Table of Contents

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

5.7 EPM - Navigating the Application Desktop .......................................................... 5
5.7 EPM - Common Buttons, Fields, and Features ..................................................... 5
5.7 EPM User Preferences - General ................................................................. 5
5.7 EPM User Preferences - Administration .......................................................... 5
5.7 EPM User Preferences - Locations ................................................................. 5
5.7 EPM User Preferences - Scheduling ............................................................... 5
5.7 Demographics - Person Records vs. Patient Charts ............................................ 6
5.7 Demographics - Overview of the People and Patient Lookup Windows ............. 6
5.7 Demographics - Overview of the Patient Information Window ......................... 6
5.7 Demographics - Adding a New Demographic Record ........................................ 7
5.7 Demographics - Updating a Patient’s Address .................................................... 7
5.7 Demographics - Overview of the Patient Chart .................................................. 7
v5.6 Insurance - Adding Insurance to a Person ....................................................... 7
v5.6 Insurance - Adding an Authorization ............................................................... 7
v5.6 Insurance - Adding an Employer with Insurance ............................................. 8
v5.6 Appointments - Scheduling Appointments ....................................................... 8
v5.6 Appointments - Printing a Fee Ticket on Demand ........................................... 8
5.7 Encounters - Checking in Patients and Creating Encounters ............................ 8
5.7 Charges - Working with Charges ...................................................................... 9
5.7 Transactions - Overview of Payment Processing .............................................. 9
v5.6 Transactions - Overview of Payment Processing Setup .................................. 9
v5.6 Claims - Billing Encounters .......................................................................... 9
v5.6 Claims - Rebilling Encounters and Regenerating Claims ................................. 9
v5.6 Claims - Processing Claims .......................................................................... 10
v5.6 Autoflow - Checkin and Checkout Setup .......................................................... 10
v5.6 Autoflow - Checking Out Patients .................................................................... 10
5.7 EPM CGT - Small Practice Education Plan Guide

The EPM CGT - Small Practice education plan will introduce users to the NextGen EPM application end user processes and workflows. The estimated time to complete this education plan is 13 hours.

5.7 EPM - Navigating the Application Desktop
Time: 25 minutes    Application Version: 5.7
Prerequisites: None
This course provides an overview of the EPM desktop components.

What You’ll Learn:
• Define the EPM desktop components, such as Title Bar, Main Menu Bar, EPM Toolbar, and Status Bar.
• Describe the Main Menu items.
• Explain the EPM Toolbar icons and their functions.

5.7 EPM - Common Buttons, Fields, and Features
Time: 20 minutes    Application Version: 5.7
Prerequisites: 5.7 EPM - Navigating the Application Desktop
This course will teach you about the common elements found in the Practice Management application.

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

5.7 EPM User Preferences - General
Time: 30 minutes    Application Version: 5.7
Prerequisites: 5.7 Navigating the EPM Application Desktop; 5.7 EPM - Common Buttons, Fields, and Features
This course covers how to customize your EPM General User Preferences.

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

5.7 EPM User Preferences - Administration
Time: 30 minutes    Application Version: 5.7
Prerequisites: 5.7 Using File Maintenance; 5.7 Security - Rights and Permissions
This course covers how to set Practice level Default User Preferences for the EPM application.

What You’ll Learn:
• Define the EPM User Administration Preferences as they apply to the EPM application.
• Create Default User Preferences in the File Maintenance application.
• Assign Default User Preferences to a group or individual in the System Administrator.
• Modify a group’s permission to set User Preferences.

5.7 EPM User Preferences - Locations
Time: 10 minutes    Application Version: 5.7
Prerequisites: 5.7 Navigating the EPM Desktop; 5.7 EPM Common Buttons Fields and Features.
This course covers how to set your EPM Location User Preferences.
What You’ll Learn:
• Determine the order that preferred service locations appear in EPM.

5.7 EPM User Preferences - Scheduling

Time: 30 minutes  
Application Version: 5.7  
Prerequisites: 5.7 Navigating the EPM Desktop; 5.7 EPM Common Buttons Fields and Features.

This course covers how to set your EPM Scheduling User Preferences.

What You’ll Learn:
• Explain the EPM Scheduling User preferences as they apply to the NextGen Enterprise Practice Management (EPM) application.
• Customize EPM Scheduling User Preferences to enable you to be more efficient when scheduling patients.

5.7 Demographics - Person Records vs. Patient Charts

Time: 15 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers the basic terminology and structure used by the Enterprise Practice Management (EPM) application to manage your patient's demographic information.

What You’ll Learn:
• Use Lookup windows to access Person Records and Patient Charts in the EPM application.
• Enter demographic information on the Add Person Information window to create a Person in the database.
• Use the Add Person Information window to create a Patient Chart.
• Identify the difference between a Person Record and Patient Chart.
• Define a relationship between a Person and a Patient.

5.7 Demographics - Overview of the People and Patient Lookup Windows

Time: 20 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers how to access the People and Patient Lookup Windows.

What You’ll Learn:
• Access the People and Patient Lookup windows.
• Define the components of the People and Patient Lookup windows.

5.7 Demographics - Overview of the Patient Information Window

Time: 40 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers the data captured on the tabs of the Person / Patient Information window.

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

Time: 15 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers how to add a new demographic record in the NextGen EPM application.

What You’ll Learn:
• Use the Add Patient Information window to add a new person to the database.

5.7 Demographics - Updating a Patient’s Address

Time: 15 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers how to update the patient’s address while changing the same address for one or more relationships at the same time.

What You’ll Learn:
• Modify a patient’s address.
• Update the addresses of the relationships attached to a patient.

5.7 Demographics - Overview of the Patient Chart

Time: 20 minutes  
Application Version: 5.7  
Prerequisites: None

This course covers how to view and manage a patient’s demographic and financial data on the Patient Chart.

What You’ll Learn:
• Use the Patient Information window to create a new Patient Chart.
• View information on the Patient Chart that is entered elsewhere in the database.
• Work with encounters associated with the Patient Chart.
• Use the Patient Chart to set up an emergency contact to print on the Patient Data sheet and set up a default provider for the Create Encounter window.
• Use the Patient Chart to track information.

5.6 Insurance - Adding Insurance to a Person

Time: 45 minutes  
Application Version: 5.6  
Prerequisites: None

This course provides an overview of the Insurance Maintenance window and covers how to attach insurance to a person’s demographic record.

What You’ll Learn:
• Attach insurance to a person’s demographic record.
• Define the components and fields of the Insurance Maintenance window.

5.6 Insurance - Adding an Authorization

Time: 30 minutes  
Application Version: 5.6  
Prerequisites: None

This course covers how to add a pre-certification or authorization code to a patient’s insurance. There is also an optional simulation on how to add a referral to a patient’s insurance and encounter.
What You’ll Learn:
• Create an Authorization Code using both Encounter and Units modes.
• Define the components of the Authorization Code Tracking window.
• Identify the different methods for accessing an Authorization Code.

v5.6 Insurance - Adding an Employer with Insurance

Time: 15 minutes  Application Version: 5.6
Prerequisites: None

This course covers how to add an employer with insurance to a patient's chart.

What You’ll Learn:
• Attach an employer with insurance to a person's demographic record.

v5.6 Appointments - Scheduling Appointments

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

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

What You’ll Learn:
• Work with the Add/Edit Appointment window.
• Add-edit, reschedule, cancel and delete appointments.
• Work with recurring appointments.
• Work with the Appointment List icon and Scheduling reports.

v5.6 Appointments - Printing a Fee Ticket on Demand

Time: 15 minutes  Application Version: 5.6
Prerequisites: None

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

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

5.7 Encounters - Checking in Patients and Creating Encounters

Time: 30 minutes  Application Version: 5.7
Prerequisites: None

This course covers to check in and create encounters for new and existing patients using the NextGen EPM Appointment Book.

What You’ll Learn:
• Identify the use of an encounter in the EPM application.
• Define the components of the Create Encounter and Encounter Maintenance windows.
• Access the Checkin / Create Encounter AutoFlow process from the NextGen EPM Appointment Book.
• Complete information on the Create Encounter and Patient Information windows.
• Check in and create encounters for new and existing patients.
5.7 Charges - Working with Charges

**Time:** 30 minutes  
**Application Version:** 5.7  
**Prerequisites:** None

This course covers how to enter and remove charges from a patient’s encounter.

**What You’ll Learn:**
- Define the components of the Charge Posting window.
- Enter a new charge for an encounter.
- Delete a charge.
- Void a charge.

5.7 Transactions - Overview of Payment Processing

**Time:** 30 minutes  
**Application Version:** 5.7  
**Prerequisites:** None

This course is an overview of how to process payments and their related adjustment and refund transactions.

**What You’ll Learn:**
- Create transaction batches.
- Enter basic payment and adjustment transactions.
- Balance transaction batches and post the transactions to the A/R.

v5.6 Transactions - Overview of Payment Processing Setup

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

In this course we will look at an overview of the general areas of your NextGen EPM application that will need to be set up in order to properly process payments and their related adjustment and refund transactions.

**What You’ll Learn:**
- Determine the types of codes you will need to set up in order to properly process payment.
- Determine the security setting options available for payment processing.
- Determine the system setup issues you will need to address to meet the specific payment processing needs of your office flow.

v5.6 Claims - Billing Encounters

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

This course covers how to bill encounters using the NextGen EPM (Enterprise Practice Management) application.

**What You’ll Learn:**
- Understand the basic steps and concepts used in the EPM billing process.
- Look up and bill encounters in a batch.
- Access and bill a single encounter on demand.

v5.6 Claims - Rebilling Encounters and Regenerating Claims

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

This course is intended to instruct the student how to rebill encounters and regenerate archived claims using the NextGen EPM application.

Proprietary and confidential information for use by NextGen Healthcare and its clients. Reprint only with permission.
What You’ll Learn:
- Rebill an encounter where a charge needs to be submitted to a secondary or tertiary insurance.
- Rebill an encounter where a new charge has been added to an encounter.
- Rebill an encounter where you have selected charges to be billed again.
- Look up archived claims and regenerate them for printing—either in a batch or one at a time as needed ('on demand'), or for electronic submission.

v5.6 Claims - Processing Claims

Time: 30 minutes  
Prerequisites: None

The purpose of this course is to instruct the student how to process claims in the NextGen EPM application.

What You’ll Learn:
- Understand the basic steps and billing concepts used in processing claims.
- Look up and print claims in a batch and on demand.
- Build an electronic claim send file for submission.

v5.6 Autoflow - Checkin and Checkout Setup

Time: 40 minutes  
Prerequisites: None

This course covers setting up the Checkin and Checkout autoflow processes in the Enterprise Practice Management (EPM) application.

What You’ll Learn:
- Define an AutoFlow Sequence as it applies to the NextGen Enterprise Practice Management (EPM) application.
- Identify and collect the information needed to set up AutoFlow Sequences.
- Create and modify AutoFlow Sequences.

v5.6 Autoflow - Checking Out Patients

Time: 30 minutes  
Prerequisites: None

This course covers how to check out a patient in the Enterprise Practice Management (EPM) application using the Autoflow function.

What You’ll Learn:
- Check out a patient using the Autoflow feature.