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The Electronic Healthcare Record (EHR) application Knowledge Base Model (KBM) tutorials are designed to teach you the fundamentals of using the KBM Workflows.

### 5.7 KBM 8.1 Workflow Tutorial - Behavioral Health Initial Psych Evaluation

**Time:** 60 minutes  
**Product:** EHR  
**Prerequisites:** None  
**KBM Version:** 8.1  
**Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course will review the Initial Psych workflow using the Initial Psychiatric Evaluation and Psychopharm Progress Note templates.

**What You’ll Learn:**
- Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
- Complete the Major Depression Inventory - 10 screening tool.
- Document behavioral exam findings.
- Document an assessment, patient treatment plan, and follow-up orders.
- Order medications.

### 5.7 KBM 8.1 Workflow Tutorial - Behavioral Health Intake

**Time:** 60 minutes  
**Product:** EHR  
**Prerequisites:** None  
**KBM Version:** 8.1  
**Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course reviews the Psych Intake workflow using the BH Progress Note templates.

**What You’ll Learn:**
- Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
- Complete the Major Depression Inventory - 10 screening tool.
- Document the patient's behavioral progress from the current treatment plan.
- Update patient's treatment plan and follow-up orders.

### 5.7 KBM 8.1 Workflow Tutorial - Cardiology

**Time:** 60 minutes  
**Product:** EHR  
**Prerequisites:** None  
**KBM Version:** 8.1  
**Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course will review the Clinical Staff and Provider workflows for a Cardiology office visit.

**What You’ll Learn:**
- Document the patient's vital signs, current medications, allergies, as well as past medical, family and social history.
- Record the patient's review of systems (ROS) information, as well as lipid panel and ECG results.
- Review, complete, and sign off on the clinical staff's documentation on each template.
- Document the patient's physical exam, diagnoses, assessments, and plans.
- Prescribe medications, submit E&M coding, and generate a comprehensive office visit note.
5.7 KBM 8.1 Workflow Tutorial - Correctional Health Management

Time: 45 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, EHR End User, Provider

Continuing Education: None
Application Version: 5.7
KBM Version: 8.1

This course will review how to use the Correctional Health Management (CHM) templates to create and maintain complete health records to standardize healthcare throughout the Corrections environment while streamlining workflow.

What You’ll Learn:
• Document a complete Intake visit using the Chm Home and Chm Intake templates.
• Generate the Chart Note for the encounter.
• Lock the encounter to prevent changes from being made.
• Set up Bad Debt Statuses
• Set up Collection Letters

5.7 KBM 8.1 Workflow Tutorial - Dermatology

Time: 60 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, EHR End User, Provider

Continuing Education: None
Application Version: 5.7
KBM Version: 8.1

This course will walk you through the Clinical Staff and Provider workflows for a Dermatology office visit.

What You’ll Learn:
• Document information for a new patient using the Framework Set templates.
• Access the Intake and History templates to document the clinical staff workflow.
• Access the Summary, SOAP, and Finalize templates to document the provider workflow.
• Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Gastroenterology

Time: 60 minutes
Product: EHR
Prerequisites: None
Specialty Add-On For: EHR CGT, EHR End User, Provider

Continuing Education: None
Application Version: 5.7
KBM Version: 8.1

This course will review how to navigate through a gastroenterology workflow for both the clinical staff and the provider, seeing a patient for a GI bleeding.

What You’ll Learn:
• Document information for a new pediatric patient using the Framework Set templates.
• Access the Intake and History templates to document the clinical staff workflow.
• Access the Summary, SOAP, and Finalize templates to document the provider workflow.
• Finalize the patient’s visit on the Checkout template.
5.7 KBM 8.1 Workflow Tutorial - General Surgery

Time: 60 minutes  
Continuing Education: None  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
KBM Version: 8.1  
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course will walk you through the Clinical Staff and Provider workflows for a General Surgery office visit.

What You’ll Learn:
- Document information for a new patient using the Framework Set templates.
- Access the Intake and History templates to document the clinical staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the provider workflow.
- Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Gynecology

Time: 60 minutes  
Continuing Education: None  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
KBM Version: 8.1  
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course will teach you to how to navigate through a gynecologic workflow for both the clinical staff and the provider.

What You’ll Learn:
- Document information for a new patient using the Framework Set templates.
- Access the Intake and History templates to document the clinical staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the provider workflow.
- Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Internal Medicine / Family Practice

Time: 60 minutes  
Continuing Education: None  
Product: EHR  
Application Version: 5.7  
Prerequisites: None  
KBM Version: 8.1  
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course covers how to document the Clinical Staff and Provider workflows for a Family Practice/Internal Medicine office visit.

What You’ll Learn:
- Document information for a new patient using the Framework Set templates.
- Access the Intake and History templates to document the clinical staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the provider workflow.
- Finalize the patient’s visit on the Checkout template.
5.7 KBM 8.1 Workflow Tutorial - Nephrology

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None  KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course will review the Clinical Staff and Provider workflows for an Nephrology visit.

What You’ll Learn:
• Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
• Document past medical, family, and social history.
• Record a patient’s physical exam and ROS findings.
• Document an assessment, patient treatment plan, and follow-up orders.
• Order medications.

5.7 KBM 8.1 Workflow Tutorial - Neurology

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None  KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course covers the Clinical Staff and Provider workflows for a Neurology visit.

What You’ll Learn:
• Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
• Document past medical, family, and social history.
• Record a patient’s physical exam and ROS findings.
• Document an assessment, patient treatment plan, and follow-up orders.
• Order medications.

5.7 KBM 8.1 Workflow Tutorial - Neurosurgery

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None  KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course covers the Clinical Staff and Provider workflows for a Neurosurgery office visit.

What You’ll Learn:
• Document information for a new patient using the Framework Set templates.
• Access the Intake and History templates to document the clinical staff workflow.
• Access the Summary, SOAP, and Finalize templates to document the provider workflow.
• Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Obstetrics

Time: 60 minutes  Continuing Education: None
Product: EHR  Application Version: 5.7
Prerequisites: None  KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course covers how to navigate through a obstetrics workflow for both the clinical staff and the provider.
What You’ll Learn:
• Document a OB workflow for clinical staff for an initial prenatal visit.
• Document a OB workflow for provider for an initial prenatal visit.

5.7 KBM 8.1 Workflow Tutorial - Oncology
Time: 60 minutes Continuing Education: None
Product: EHR Application Version: 5.7
Prerequisites: None KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course will review the Clinical Staff and Provider workflows for an Oncology visit.

What You’ll Learn:
• Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
• Document past medical, family, and social history.
• Record a patient's physical exam and ROS findings.
• Document an assessment, patient treatment plan, chemotherapy, and follow-up orders.
• Order medications.

5.7 KBM 8.1 Workflow Tutorial - Ophthalmology
Time: 60 minutes Continuing Education: None
Product: EHR Application Version: 5.7
Prerequisites: None KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course reviews how to document the Technician and Provider workflows for an Ophthalmology office visit.

What You’ll Learn:
• Document information for a new patient using the Ophthalmology templates.
• Access the Home, CC-HPI-ROS, History, and Tech Exam templates to document the Technician workflow.
• Access the Provider Start, Exam, Procedures, and Plan templates to document the Provider workflow.

5.7 KBM 8.1 Workflow Tutorial - Ophthalmology ASC
Time: 60 minutes Continuing Education: None
Product: EHR Application Version: 5.7
Prerequisites: None KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course reviews how to document the pre-operative office visit and surgical workflow for a cataract surgery.

What You’ll Learn:
• Document the pre-operative office visit and surgical workflow for cataract surgery.
• Submit E&M Coding for the procedure.
• Generate a variety of documents, including the Chart Note, Referral Letters, and Pre- and Post-Op reports for the encounter.

5.7 KBM 8.1 Workflow Tutorial - Ophthalmology Retina
Time: 60 minutes Continuing Education: None
Product: EHR Application Version: 5.7
Prerequisites: None KBM Version: 8.1
Specialty Add-On For: EHR CGT, EHR End User, Provider

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This course reviews how to document the Technician and Provider workflows for a Retina specialty office visit.

**What You’ll Learn:**
- Document information for a new patient using the Ophthalmology templates.
- Access the Home, CC-HPI-ROS, History, and Tech Exam templates to document the Technician workflow.
- Access the Provider Start, Exam, Procedures, and Plan templates to document the Provider workflow.

5.7 KBM 8.1 Workflow Tutorial - Orthopedics

- **Time:** 60 minutes
- **Product:** EHR
- **Prerequisites:** None
- **KBM Version:** 8.1
- **Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course covers how to document the Clinical Staff and Provider workflows for an Orthopedics office visit.

**What You’ll Learn:**
- Document information for a new patient using the Framework Set templates.
- Access the Intake and History templates to document the Clinical Staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the Provider workflow.
- Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Otolaryngology

- **Time:** 60 minutes
- **Product:** EHR
- **Prerequisites:** None
- **KBM Version:** 8.1
- **Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course will teach you how to document the Clinical Staff and Provider workflows for an Otolaryngology office visit.

**What You’ll Learn:**
- Document information for a new patient using the Framework Set templates.
- Access the Intake and History templates to document the Clinical Staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the Provider workflow.
- Finalize the patient's visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Pediatrics

- **Time:** 60 minutes
- **Product:** EHR
- **Prerequisites:** None
- **KBM Version:** 8.1
- **Specialty Add-On For:** EHR CGT, EHR End User, Provider

This course will teach you how to navigate through a pediatric workflow for both the clinical staff and the provider, seeing a patient for a well-child visit.

**What You’ll Learn:**
- Document information for a new pediatric patient using the Framework Set templates.
- Access the Intake and History templates to document the clinical staff workflow.
- Access the Summary, SOAP, and Finalize templates to document the provider workflow.
- Finalize the patient’s visit on the Checkout template.

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5.7 KBM 8.1 Workflow Tutorial - Physical Therapy

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, EHR End User, Provider  
Continuing Education: None  
Application Version: 5.7  
KBM Version: 8.1  

This course covers how to document the workflow for a physical therapy evaluation and treatment.

What You’ll Learn:
• Navigate to the PT Home template and understand the components of this template and the navigation toolbar.
• Complete the Initial Physical Therapy Evaluation template.
• Use the PT Note template to record daily progress and exercise information and to assess the patient's progress.
• Generate a comprehensive Chart Note encompassing all of the data collected during the encounter.

5.7 KBM 8.1 Workflow Tutorial - Pulmonary Medicine

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, EHR End User, Provider  
Continuing Education: None  
Application Version: 5.7  
KBM Version: 8.1  

This course covers how to navigate through a pulmonary medicine workflow for both the clinical staff and the provider, seeing a patient for a COPD Consult.

What You’ll Learn:
• Document information for a new pulmonary patient using the Framework Set templates.
• Access the Intake and History templates to document the clinical staff workflow.
• Access the Summary, SOAP, and Finalize templates to document the provider workflow.
• Finalize the patient's visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Rheumatology

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, EHR End User, Provider  
Continuing Education: None  
Application Version: 5.7  
KBM Version: 8.1  

This course covers how to navigate through a rheumatology medicine workflow for both the clinical staff and the provider, seeing a patient for joint pain.

What You’ll Learn:
• Document information for a new rheumatology patient using the Framework Set templates.
• Access the Intake and History templates to document the clinical staff workflow.
• Access the Summary, SOAP, and Finalize templates to document the provider workflow.
• Finalize the patient’s visit on the Checkout template.

5.7 KBM 8.1 Workflow Tutorial - Urgent Care

Time: 60 minutes  
Product: EHR  
Prerequisites: None  
Specialty Add-On For: EHR CGT, EHR End User, Provider  
Continuing Education: None  
Application Version: 5.7  
KBM Version: 8.1  

This course covers the Clinical Staff and Provider workflows for an Urgent Care visit.
What You’ll Learn:
• Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
• Document past medical, family, and social history.
• Record a patient’s physical exam and ROS findings.
• Document an assessment, patient treatment plan, and chemotherapy orders.
• Order medications.

5.7 KBM 8.1 Workflow Tutorial - Urology

Time: 60 minutes  Continuing Education: None  
Product: EHR  Application Version: 5.7
Prerequisites: None  KBM Version: 8.1  
Specialty Add-On For: EHR CGT, EHR End User, Provider

This course covers the Clinical Staff and Provider workflows for an Urology visit.

What You’ll Learn:
• Document reason for visit, vital signs, current medications, existing medical conditions, and allergies.
• Document past medical, family, and social history.
• Record a patient’s physical exam and ROS findings.
• Document an assessment, patient treatment plan, and follow-up orders.
• Order medications.