5.6 Education Plan Guide >> Scheduler
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This document is for informational purposes only. You cannot launch eLearning courses from this page.

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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 and QSI 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 My Courses – Completed page of your eLearning account. In the Learning Center, a course is represented by a red book.

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.

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, “CME: Yes”.

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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5.6 Scheduler Education Plan Guide

The Scheduler education plan will teach you basic and advanced tasks related to appointment scheduling. It contains some SCT and some CGT courses, and is suitable for all employees who perform scheduling tasks. The estimated time to complete this education plan is 9 hours.

Application Overviews - EPM Only v5.6

This curriculum focuses on how to access the NextGen applications and databases.

v5.6 Introduction to the EPM

Time: 45 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: None

This course will teach you to identify the important features and functionalities of the NextGen EPM application and help you to understand application’s key role in billing and collections workflow cycle.

What You’ll Learn:
• Describe the NextGen EPM (Enterprise Practice Management) application and some of its advantages.
• List the main steps in NextGen Medical Billing process.
• Practice the NextGen billing process in a simulated environment.
• Identify some of the main features of the EPM application.
• Explain how NextGen manages EPM’s database.

Getting Started in NextGen v5.6

This curriculum focuses on how to access the NextGen applications and databases.

v5.6 Application Launcher

Time: 15 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: None

This course is designed to help you to navigate through the Application Launcher that is used to access the NextGen applications.

What You’ll Learn:
• Open the Application Launcher from your desktop or from the Windows toolbar.
• Review the Legal Disclaimer window.
• Sign on to a NextGen application by using your user name/password combination-or your PIN.
• Customize the NextGen Menu with your desired applications.
• Create desktop shortcuts for the NextGen applications.

Appointment Scheduling Basics v5.6

This curriculum focuses on familiarizing the student with the Appointment Scheduling process.

v5.6 Appointments - Appointment Scheduling Terms

Time: 15 minutes
Application Version: 5.6
Prerequisites: None

This course is intended to familiarize the student with the terms used when scheduling appointments in the Enterprise Practice Management (EPM) application.
What You’ll Learn:
- Define a resource.
- Define an event.
- Define an event chain.
- Define a category.
- Define a location.

v5.6 Appointments - Navigating the Appointment Book
Time: 15 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: None

This course covers the toolbar icons and appointment views in the EPM Appointment Book.

What You’ll Learn:
- Name the different parts of the Appointment Book.
- Recall how to use the different Appointment Book views.
- Recognize icons found on the Appointment Book toolbar.

EPM Application Basics v5.6
This curriculum focuses on the EPM application desktop menus and toolbars, along with shortcuts that can be used to access application functions.

v5.6 EPM - Navigating the Application Desktop
Time: 15 minutes
Application Version: 5.6
Prerequisites: None

This course is intended to familiarize the student with the visual interface for the Enterprise Practice Management (EPM) application.

What You’ll Learn:
- Define components of the desktop in order to navigate the EPM application easily and efficiently.

v5.6 EPM - Common Buttons Fields and Features
Time: 20 minutes
Application Version: 5.6
Prerequisites: None

This course is designed to provide an overview of the common buttons-fields, and features found in the Enterprise Practice Management (EPM) 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.

EPM User Preferences - Appointment Scheduling v5.6
This curriculum focuses on the Appointment Scheduling User Preferences.

v5.6 EPM User Preferences - Scheduling
Time: 45 minutes
Application Version: 5.6-5.6 SP1
Prerequisites: None
This course covers the steps necessary to set up user preferences for the Electronic Practice Management (EPM) appointment book.

**What You’ll Learn:**
- Define 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.

**EPM Demographics - Working with Demographic Information v5.6**

This curriculum focuses on familiarizing the learner with how to locate a person’s record in the EPM application along with how to add and update their demographic information.

**v5.6 Demographics - Person Records vs. Patient Charts**

- **Time:** 15 minutes  
  - **Application Version:** 5.6  
  - **Prerequisites:** None

  The purpose of this course is to explain the differences-in form and use, between the Person Record and the Patient Chart.

  **What You’ll Learn:**
  - Describe the difference between a Person record and a Patient chart.
  - Access patient-related demographic data within the NextGen application.

**v5.6 Demographics - Overview of the People and Patient Lookup Windows**

- **Time:** 20 minutes  
  - **Application Version:** 5.6-5.6 SP1  
  - **Prerequisites:** None

  The purpose of this course is to familiarize the student with the components of the People Lookup and the Patient Lookup windows.

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

**v5.6 Demographics - Adding a New Demographic Record**

- **Time:** 15 minutes  
  - **Application Version:** 5.6-5.6 SP1  
  - **Prerequisites:** None

  The purpose of this course is to instruct the student how to add a new person’s demographic information to the Master Person Index (MPI).

  **What You’ll Learn:**
  - Add a new person to the Master Person Index (MPI).
  - Define the components of the Patient Information window.

**v5.6 Demographics - Overview of the Patient Information Window**

- **Time:** 20 minutes  
  - **Application Version:** 5.6-5.6 SP1  
  - **Prerequisites:** None

  The purpose of this course is to familiarize the student with the components of the Patient Information window.
What You’ll Learn:
• Access the Patient Information window.
• Define the components of the Patient Information window.

**v5.6 Demographics - Overview of the Patient Chart**

Time: 40 minutes  
Application Version: 5.6  
Prerequisites: None

The purpose of this course is to familiarize the student with the components of the Patient Chart.

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.

**EPM Insurance - Working with Insurance v5.6**

This curriculum focuses on familiarizing the learner with insurance maintenance.

**v5.6 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.

**v5.6 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.

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.
EPM Appointments - Scheduling Appointments v5.6

This curriculum focuses on the basics of Appointment Scheduling in the EPM application.

**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.

**v5.6 Appointments - Working with the Appointment Waitlist**

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

This course is intended to instruct the student how to use the Appointment Wait List to help patients with scheduling appointments more suited to their needs.

**What You’ll Learn:**
- Add a patient to the Wait List by creating a wait-list item.
- List ways to access wait-list items-make changes to them, and delete older ones.
- List ways to process wait-list items.

**EPM Appointment Follow-up - End User v5.6**

This curriculum focuses on the Appointment Scheduling functions of the EPM application intended to aid with scheduling and reminding patients of return and follow-up appointments.

**v5.6 Appointment Follow-up - Overview**

**Time:** 20 minutes  
**Application Version:** 5.6-5.6 SP1  
**Prerequisites:** None

This course provides an overview of the appointment follow-up process in the Enterprise Practice Management (EPM) application.
What You’ll Learn:
- List the functions to use in the appointment follow-up process.
- Recall how to use each function.

v5.6 Appointment Followup - Working with Appointment Reminders

Time: 30 minutes  
Application Version: 5.6

Prerequisites: None

This course covers how to use the Appointment Reminder function of the Enterprise Practice Management (EPM) application to remind patients of upcoming appointments.

What You’ll Learn:
- Print Appointment Reminder letters on-demand.
- Print Appointment Reminder letters in a batch.
- Print Mailing Labels in a batch.

v5.6 Appointment Followup - Working with Recall Plans

Time: 30 minutes  
Application Version: 5.6

Prerequisites: None

This course cover how to use the Recall Plan function of the Enterprise Practice Management (EPM) application to remind patients of the need to schedule upcoming follow-up appointments.

What You’ll Learn:
- Add a patient to a Recall Plan from various areas of the EPM application.
- Print Recall Plan letters on demand and in a batch.
- View tasks generated from Recall Plans.
- Run and “work” the Recall report.