

Electronic Health Records Curriculum

Day	Module Description	Module Topics	Hands-On Exercises	Reporting Topics	Case Study / Critical Thinking
1	Overview of Electronic Health Records / Review of Course Requirements	1. Student Handbook/Medical Forms/Supply Distribution 2. Review of Syllabus and Course Requirements 3. Review of Internship Requirements 4. Electronic Health Record Overview: Part 1 <ul style="list-style-type: none"> a. Legal and Regulatory Aspects b. Patient Privacy and HIPAA 5. The Changing Nature of Health Care Delivery 6. Demonstration of Neehrperfect 7. Employment Placement: (Part 1)	1. The Components Of A Successful Internship 2. Logon/off to EHR, Input Patient and Providers 3. Introduction To Meaningful Use Concepts	1. Introduction To Report Writing 2. Ad-Hoc Vs. Pre-Formatted Reports 3. Measuring and Monitoring Meaningful Use	1. HIPAA Fundamentals: Understanding Patient Rights and Responsibilities 2. The Language of Health Care
2	Electronic Health Records in the Medical Practice	1. Electronic Health Records Overview: Part 2 <ul style="list-style-type: none"> a. Technical Structure Of Electronic Health Records b. Understanding Relational Databases (With MS Access Database Exercise) c. Fundamentals of System Security (Part 1) d. Introduction To Practice Workflow (Part 1) 2. Orientation to NeehrPerfect <ul style="list-style-type: none"> a. Logon Review b. Screen Design c. Edits 3. Database Project (Part 1)	1. Overview: Working With Patient Schedules 2. Insurance Eligibility Verification 3. Understanding The Structure of Relational Databases 4. Aspects of Medical Vs. Surgical Practices	1. Understanding Report Output Formats 2. Establishing fields and report selection criteria	1. Claims Processing: Then and Now 2. The Evolution of the Patient Chart 3. Introduction To Practice Management Indicators
3	Understanding the Structure of the Medical Practice	1. Organizing The Medical Practice <ul style="list-style-type: none"> a. The Organization Of An Individual and Group Medical Practice b. Patient Scheduling Dynamics c. Patient Registration and Demographics Data d. Patient Document Management (Part 1) e. Financial Screening and Medical Billing Management (Part 1) f. Claims Processing and Insurance Follow-Up 2. Orientation to NeehrPerfect (Part 2)	1. Review of Practice Profiles 2. Understanding Scheduling Constraints 3. Clinical Vs. Financial Screening 4. Meaningful Use Concepts (Part 2)	1. Understanding Practice Measurement Indicators 2. Detail Vs. Summary Reporting 3. Meaningful Use Definitions and Monitoring Techniques	1. Starting Over: How To Organize A Medical Practice From The Ground Up 2. The Ever Important Face Sheet

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4	Electronic Health Records In A Clinic or Community Health Center Overview of System Functionality	<ol style="list-style-type: none"> 1. The Organization Of A Clinic Or A Community Health Center 2. Typical EHR System Screen Orientation and Navigation 3. Patient Lookup, Registration and Verification 4. Duplicate Verification and Follow-Up (Exercise: Finding Duplicate Patients) 5. Fundamentals Of System Security 6. Patient Document Management (Part 2) 7. Employment Placement: (Part 2) 	<ol style="list-style-type: none"> 1. Establishing and Maintaining System Security 2. Ten Common Mistakes In System Security 	<ol style="list-style-type: none"> 1. Understanding System Reports 2. Report Testing and Quality Assurance 	<ol style="list-style-type: none"> 1. The Impact of The Implementation of EHR In A Federally Qualified Health Center (FQHC)
5	Patient Registration	<ol style="list-style-type: none"> 1. Understanding and Working With The Medical History 2. Patient Registration <ol style="list-style-type: none"> a. Adding New Patients b. Editing Patient Demographics c. Editing / Verifying Changes in Insurance Coverage d. Understanding Multiple Insurance Plans and Guarantors e. Patient Check-In / Check-Out f. Patient Referrals From Other Providers) 3. Medication Orders and Pharmacy Prescriptions 4. Creating and Editing Order Sets (Part 1) 5. Document Management and Imaging <ol style="list-style-type: none"> a. Incorporating Images b. Document Management Conversions 6. NeehrPerfect: Registering Patients 7. Database Project (Part 2) 	<ol style="list-style-type: none"> 1. Fundamentals of Appointment Scheduling 2. Internal Vs. External Communication 3. Insurance Eligibility Verification 4. Working With Multiple Insurance Plans and Guarantors 5. Integrating Hard Copy Documents Into The Electronic Health Record 	<ol style="list-style-type: none"> 1. Analyzing Patterns of Broken Appointments 2. Analyzing Practice Referral Patterns 3. Insurance Coverage By Month 4. Medication Administration Record and Utilization 	<ol style="list-style-type: none"> 1. To Scan Or Not To Scan: One Health Care Organization's Experience With The Implementing Point-Of-Service Scanning and Imaging

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6	Patient Scheduling and Document Management	<ol style="list-style-type: none"> 1. Patient Scheduling (Part 1) 2. Telephone and E-Mail Scheduling 3. In-person and/or Follow-Up Appointment Scheduling 4. Reminders / Office Visit Follow-Up 5. Internal Communication 6. External Communication 7. Telephone Etiquette and Triage 8. Creating and Editing Patient Appointments 9. Creating and Editing Provider Block Appointments (Exercise: Block Appointments) 10. Medication Orders and Pharmacy Prescriptions 11. Creating and Editing Order Sets (Part 1) 12. Document Management and Imaging 13. Incorporating Images Into Patient Record 14. Working With Other Scanned Output 15. NeehrPerfect: Setting Up Cases 16. Employment Placement (Part 3) 	<ol style="list-style-type: none"> 1. Fundamentals of Appointment Scheduling 2. Creating and Editing Provider Block Appointments 3. Internal Vs. External Communication 4. Insurance Eligibility Verification 5. Working With Multiple Insurance Plans and Guarantors 6. Integrating Hard Copy Documents Into The Electronic Health Record 	<ol style="list-style-type: none"> 1. Analyzing Patterns of Broken Appointments 2. Analyzing Practice Referral Patterns 3. Insurance Coverage By Month 4. Medication Administration Record and Utilization 	To Scan Or Not To Scan: One Health Care Organization's Experience With The Implementing Point-Of-Service Scanning and Imaging
7	Clinical Provider Order Entry (CPOE) / Results Reporting MID Term Exam	<ol style="list-style-type: none"> 1. Overview of the Ordering Process 2. Medication Ordering 3. Supply Ordering 4. Working With And Customizing Order Sets 5. NeehrPerfect: Ordering Tests and Checking Results 6. Database Project (Part 3) 	Practice Workflow (Part 2) Supply Chain Mgmt	Productivity Measurements Tracking Supply Utilization	Achieving Maximum Efficiency With Order Sets

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8	Patient Documentation and Reporting (Part 1)	<ol style="list-style-type: none"> 1. Review: Patient Scheduling & Registration 2. Review: Document Management & Messaging 3. Patient Documentation <ol style="list-style-type: none"> a. Progress Notes b. SOAP Methodology c. Lab, Imaging, and Immunization Patient Flow d. Ordering Lab Tests and Recording / Scanning Results e. Patient Referrals From Other Providers f. Establishing Alerts and Recalls 4. Creating and Editing Order Sets 5. Employment Placement (Part 4) 	<ol style="list-style-type: none"> 1. Fundamentals of Progress Notes 2. Follow-Up For Diabetic Patients 3. Patient Scheduling 	<ol style="list-style-type: none"> 1. Understanding Report Option Parameters 2. Developing Customized Reports 	<ol style="list-style-type: none"> 1. The Use (and Misuse) of Patient Scheduling
9	Patient Documentation and Reporting (Part 2)	<ol style="list-style-type: none"> 1. Review: Patient Documentation 2. Review: Patient Referrals From Other Providers 3. Progress Notes (Part 2) 4. Ordering Lab Tests and Recording / Scanning Results (Part 2) 5. Establishing and Maintaining Alerts and Recalls (Part 2) 6. Using System Reports For Monitoring Documentation (Part 4) 7. Database Project (Part 4) 	<ol style="list-style-type: none"> 1. Ordering Lab Tests / Recording Results 2. Acknowledging A Referral 3. Referral Follow-Up 	<ol style="list-style-type: none"> 1. Tracking Referral Patterns Among Providers 2. Monitoring Provider Compliance 	<ol style="list-style-type: none"> 1. How Progress Noting Changed My Medical Practice 2. Clinical Documentation: If It Wasn't Written, It Didn't Happen

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10	<p>Patient Documentation and Reporting (Part 2)</p> <p>Financial Management and Reporting (Part 1)</p>	<ol style="list-style-type: none"> 1. Financial Screening and Medical Billing Management (Part 2) 2. Establishing and Maintaining Payer Contracts and Fee Schedules 3. Fundamentals of ICD and CPT Coding (Part 1) 4. Overview of Electronic Payment Posting and Remittances 5. Creation of Financial / Billing Alerts and Recalls 6. Fundamentals of Collection Management <ol style="list-style-type: none"> a. Internal Collection Management b. External Collection Management 7. Claims Scrubbing and Quality Assurance / Tracking Claim Status 8. Electronic Claims Submission Via Clearinghouses 9. Employment Placement (Part 5) 	<ol style="list-style-type: none"> 1. Working With Co-Payments, Contract Discounts and Allowances 2. Alerts and Recalls For Finance 	<ol style="list-style-type: none"> 1. Financial Vs. Clinical Reporting 2. Effective Accounts Receivable Reporting Practices 	<ol style="list-style-type: none"> 1. Our Lives Are All Different Now: The Case Of Communication Between Physician and Accountant 2. The Impact of Practice Cash Flow Using Electronic Billing
11	Patient Flow and Advanced Document Management	<ol style="list-style-type: none"> 1. Review: Financial Screening and Medical Billing Management 2. Review: Creating and Editing Order Sets 3. Progress Notes (Part 3) 4. Developing Custom Flow Sheets 5. Document Management <ol style="list-style-type: none"> a. Commenting Documents b. Immunization Patient Flow c. Ordering Lab Tests and Recording / Scanning Results (Part 2) d. Establishing Alerts and Recalls 6. Employment Placement (Part 6) 7. Database Project (Part 5) 	<ol style="list-style-type: none"> 1. Creating Predefined Progress Notes 2. Alerts and Recalls: Patient Immunization 3. Alerts and Recalls: Diabetic Patient Follow-Up 	<ol style="list-style-type: none"> 1. Using System Reports For Monitoring Abnormal Lab Results 2. Reporting Progress Notes 	<ol style="list-style-type: none"> 1. The Case Of Morbid Hypertension and Electronic Health Registration

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12	Provider Documentation (Part 3) Monitoring Clinical Productivity	<ol style="list-style-type: none"> 1. Review: Patient Flow Concepts 2. Review of SOAP notation methodology 3. Creating Exam Template 4. Provider Diagnosis Assignment and Related Coding 5. Modification Of Custom Order Sets 6. Accessing Lab Results / Follow-Up Procedures 7. Working With Reference (External) Labs 8. Sending Results To Referring Providers and Other Organizations 9. Employment Placement (Part 7) 	<ol style="list-style-type: none"> 1. Understanding SOAP Documentation Principles Part 1 2. Creating and Editing a Chest X-Ray Order Set 3. Custom Order Set Creation 	<ol style="list-style-type: none"> 1. Using System Reports For Monitoring Provider Productivity 2. Incorporating Order Sets From Other Providers or Practices 	<ol style="list-style-type: none"> 1. The Impact of Custom Order Sets on Practice Productivity. 2. How SOAP saved our Practice
13	Project Management of the Electronic Health Record Implementation Process Part 1	<ol style="list-style-type: none"> 1. Review: SOAP Notation and Diagnosis Assignment 2. Evaluation and Acquisition of Electronic Health Record (EHR) Products 3. Understanding The EHR Installation Cycle (Case Study 4) 4. Understanding EHR Interfaces <ol style="list-style-type: none"> a. Reference Lab b. Hospital c. Pharmacy 5. Database Project (Part 6) 	<ol style="list-style-type: none"> 1. Review of SOAP Documentation Principles Part 2 2. Creating The EHR Implementation Team 3. Overview of Interfaces 		<ol style="list-style-type: none"> 1. SOAP Exercise (Part 2) 2. EHR Budget Creation 3. Understanding the Interface Installation Cycle

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14	Project Management of the Electronic Health Record Implementation Process Part 2	<ol style="list-style-type: none"> 1. The Data Migration Path Between Two EHR Systems 2. Advanced Documentation Management 3. Advanced System Security (Exercise: Modification To Existing User Rights/Privileges) 4. EHR: The Next Generation 5. Employment Placement (Part 8) 6. Database Project (Part 7) 	<ol style="list-style-type: none"> 1. Planning For Data Migration 2. Updating EHR Security Modules 	<ol style="list-style-type: none"> 1. Putting The Pieces Together: Comprehensive EHR Reporting 2. Importing and Exporting Data From EHR Products To External Data Platforms 	<ol style="list-style-type: none"> 1. EHR Implementation in a Large Multi-Specialty Medical Group 2. Working Effectively With Reference Labs
15	Final Exam	<ol style="list-style-type: none"> 1. Final Exam 2. Project Review 3. Employment Placement (Part 9) 			