

**tsiU**

**iversity**

**COURSE  
OFFERINGS**



# tsi healthcare

## university client training program

Dear Valued Client,

Since our inception in 1997, TSI Healthcare has followed a guiding principle that support and training do not end after implementation. We have long recognized that as your practice continues to change and grow, new staff members must be trained to allow you to attain the maximum return on your investment in human capital, as well as your investment in your IT services. Additionally, and more than ever before, new government requirements and protocols “mandate” the need for your existing staff to continue their education to maintain and expand their utilization.

As such, and in our continuing efforts to bring more value to all of our clients while not losing sight of the “human element”, we introduce TSI University™. This new program was designed to accommodate the need for these additional services while maintaining a high sensitivity regarding the financial concerns of paying for on-site training time. After taking suggestions from our existing client base and through our own experiences, we have discovered that a customized combination of classroom and online course offerings will help you and your practice take your IT systems to even higher levels of utilization while keeping your costs to provide such valuable services down. At TSI, our goals are the same as yours—improving YOUR practice efficiency and profitability.

With TSI University™, employees in your office can attend one-on-one specialty or job-specific sessions in our state-of-the-art classroom facilities. If this is not always convenient, you can take advantage of our online courses in the comfort of your own office and at your own pace. In addition, TSI offers other resources for our clients including our Referral Rewards™ and Circle of Excellence™ programs. We invite and encourage you to take advantage of these opportunities and get even more out of your relationship with TSI Healthcare.

Once again, thank you for your valued support and continued confidence in our company. We hope you and your staff will join us for any of our TSI University™ courses, and as always, we appreciate and value your feedback so that we can continue to offer and improve our services for you, our most prized asset.

Sincerely yours,



David Dickson, Jr.  
President and CEO

# tsiUCOURSEOFFERINGS






All courses are now offered online, with the exception of EPM 301 and EPM 302.

The following courses have the option of being taken online or in the classroom: EPM 101, EPM 103, EPM 201, EHR 101 and EHR 103.



For more information on TSI University and other client programs please contact:

tsiuniversity@tsihealthcare.com

## EPM COURSE OFFERINGS | Pages 4&5

-  **EPM 101** | EPM Basics for Front Desk Staff | *Classroom Optional*
- EPM 102** | EPM Basics Refresher Course | Front Desk Staff
-  **EPM 103** | EPM Basics for Billing Staff | *Classroom Optional*
- EPM 104** | EPM Basics Refresher Course | Billing Staff
-  **EPM 201** | EPM Administrator Training
- EPM 202** | EPM Administrator Refresher Course
- EPM 203** | Reporting | Accounts Receivable
- EPM 204** | Reporting | Monthly Reports
- EPM 205** | Automated A/R Follow-up & A/R Tasking
- EPM 206** | Scheduling Administration
- EPM 207** | Person Merge
- EPM 208** | Unapplied Credits
- EPM 209** | Advanced Transactions
-  **EPM 301** | Advanced EPM A/R Management | *Classroom Only*
-  **EPM 302** | Advanced Reporting | *Classroom Only*

## EHR COURSE OFFERINGS | Pages 6&7

-  **EHR 101** | EHR & ICS Basics for Office Staff | *Classroom Optional*
- EHR 102** | EHR & ICS Basics Refresher Course | Office Staff
-  **EHR 103** | EHR Basics for Clinical Staff | *Classroom Optional*
- EHR 104** | EHR Basics Refresher Course | Clinical Staff
- EHR 201** | ePrescribing (eRx) | End-User Training
- EHR 202** | Family Practice/Internal Medicine Workflow
- EHR 203** | Gynecology (GYN) Patient Encounter Workflow
- EHR 204** | Obstetrics (OB) Patient Encounter Workflow
- EHR 205** | Ophthalmology Patient Encounter Workflow
- EHR 206** | Orthopedics Patient Encounter Workflow
- EHR 207** | Urology Patient Encounter Workflow
- EHR 208** | Dermatology Patient Encounter Workflow
- EHR 209** | Pediatrics Patient Encounter Workflow
- EHR 302** | Provider Approval Queue
- EHR 303** | Advanced Tasking & Workflow Manager
- EHR 304** | Basic EHR Reporting | *Prerequisite of EHR 305*
- EHR 305** | Advanced EHR Reporting Tool

## SUPPLEMENTARY COURSES | Page 8

- RealMed® 101** | RealMed® Basics | Eligibility
- RealMed® 102** | RealMed® Basics | Claims & Remittance (ERA)
- RealMed® 103** | Basics Refresher Course | Claims, Remittance (ERA) & Eligibility
- RealMed® 201** | Troubleshooting
- RealMed® 301** | Advanced Reporting

## PRICING/SCHEDULE/REGISTRATION | Page 8

# EPM COURSE OFFERINGS

All EPM courses are now offered online, with the exception of **EPM 301** and **EPM 302**.

The following **EPM** courses have the option of being taken online or in the classroom:

**EPM 101**, **EPM 103** and **EPM 201**.

TSI partners with NextGen® Healthcare to provide the most sophisticated EHR and PM solutions in the industry. For more information, call **800.354.4205**.

**NEXTGEN**<sup>®</sup>  
Enterprise Practice  
Management

-  **EPM 101 | EPM Basics for Front Desk Staff** | *Classroom Optional*  
**4 hours** | 2, 2-hour sessions | *Intended as training for new front desk staff*
- SESSION 1 | Check In
- Overview of NextGen® EPM; Appointment scheduling best practices; Autoflow; “Manual” process; Payment entry; Adding payers and other information to charts
- SESSION 2 | Check out
- End-of-day reports; Scheduling reports; Recall plans; Wait list; Charge entry
- ▶ **EPM 102 | EPM Basics Refresher Course | Front Desk Staff**  
**2 hours** | 1, 2-hour session | *Intended for front desk staff*
- Topics to include: Appointment scheduling best practices; Check-in; Check-out; Reporting basics; Recall plans; Wait list
-  **EPM 103 | EPM Basics for Billing Staff** | *Classroom Optional*  
**8 hours** | 4, 2-hour sessions | *Intended as training for new billing staff*
- SESSION 1 | Charge Entry & Payment Entry Processes
- Overview of NextGen® EPM; Making corrections; Encounter maintenance; Patient payments; Unapplied credits
- SESSION 2 | Insurance Payments & Coordination of Benefits (COB)
- ERA; Reason codes; Settle status
- SESSION 3 | Billing Best Practices
- Claim edit libraries; Resolving claim errors; EDI file creation; Clearinghouse reports; Daily/Monthly reporting
- SESSION 4 | Collection follow-up: Statement processing; Reports; Worklog; Tasks
- ▶ **EPM 104 | EPM Basics Refresher Course | Billing Staff**  
**2 hours** | 1, 2-hour session | *Intended for billing staff*
- Topics to include: Payment entry process; Insurance payments (ERA, Settle status); Billing best practices; Daily/Monthly reporting; Statement processing; Collection follow-up; Coordination of benefits (COB)
-  **EPM 201 | EPM Administrator Training** | *Classroom Optional*  
**8 hours** | 4, 2-hour sessions | *Intended for practice managers hired after go-live or employees moving into administrative roles*
- SESSION 1 | Overview & System Administration
- Overview of NextGen® Logic and system; User maintenance; Security settings
- SESSION 2 | File Maintenance
- Provider maintenance; Payer maintenance; Locations; Task types; Libraries (SIM, reason codes, remittance profile, ICD-9 codes); Claim edit; Claim print
- SESSION 3 | Electronic Practice Management (EPM)
- Practice preferences; Enterprise preferences; User preferences; Significant events; Scheduling administration
- SESSION 4 | Overview of Reports & Report Logic
- ▶ **EPM 202 | EPM Administrator Refresher Course**  
**2 hours** | 1, 2-hour session | *Intended for practice managers*
- Topics to include: System administrator; File maintenance; Practice Management functions


# EPM COURSE OFFERINGS

“The A/R Management and Advanced Reporting classes for NextGen® EPM were awesome! With all of my responsibilities as a practice manager, I am anxious to utilize the reports, information and tips that will certainly make my job easier.”


**Terry Lanier**, Practice Manager  
Lexington Orthopedic Clinic, PA

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Management

- ▶ **EPM 203 | Reporting | Accounts Receivable**  
**2 hours** | 1, 2-hour session | *Intended for billing managers and staff*
  - Topics to include: Overview of Accounts Receivable reports; Understanding filter options; Balancing other reports; Common uses
  
- ▶ **EPM 204 | Reporting | Monthly Reports**  
**2 hours** | 1, 2-hour session | *Intended for billing and practice managers and core team staff*
  - Topics to include: Overview of monthly reports; Understanding filter options; Balancing other reports; Common uses
  
- ▶ **EPM 205 | Automatic A/R Follow-up & A/R Tasking**  
**2 hours** | 1, 2-hour session | *Intended for staff responsible for setting tasks*
  - Topics to include: Security and file maintenance set-up; Task types and options, including auto-create and auto-worker functionality; Task work groups; Creating manual tasks; Overview and use of the Workflow Manager; Reporting
  
- ▶ **EPM 206 | Scheduling Administration**  
**2 hours** | 1, 2-hour session | *Intended for staff responsible for provider schedules*
  - Topics to include: Maintaining provider schedule templates; Using different provider time intervals; Using event chains
  
- ▶ **EPM 207 | Person Merge**  
**1 hour** | 1, 1-hour session | *Intended for practice managers and office staff responsible for managing duplicate person/patient records*
  - Topics to include: Security and file maintenance set-up; Person/Patient Merge levels; Process and options for merging duplicate records; Using the Patient Merge function within the BBP; Significant events associated with Patient Merge
  
- ▶ **EPM 208 | Unapplied Credits**  
**1 hour** | 1, 1-hour session | *Intended for billing managers that use unapplied credits*
  - Best Practices for managing/monitoring unapplied credits
  
- ▶ **EPM 209 | Advanced Transactions**  
**1 hour** | 1, 1-hour session | *Intended for billing managers and other advanced users*
  - Topics to include: Corrections; Adjustments; Refunds; Take-backs
  
- ▶  **EPM 301 | A/R Management Seminar | Classroom Only**  
**8 hours** | 4, 2-hour sessions | *Intended for billing managers and staff*
  - Topics to include: A/R Reporting, including different reports and using filters; Reducing claim errors; Collection letters; Budget plans; Bad debt process; Coordination of benefits (COB)


*EPM 301 and EPM 302 are intended to be taken together in the classroom.*

- ▶  **EPM 302 | Advanced Reporting | Classroom Only**  
**8 hours** | 4, 2-hour sessions | *Intended for practice and billing managers*
  - Topics to include: Overview of reports and report logic; Daily and monthly balancing reports; Troubleshooting report balancing problems; A/R reporting and balancing; Employee productivity reporting; Using Excel to enhance reporting

# EHR COURSE OFFERINGS

All EHR courses are now offered online.

The following **EHR** courses have the option of being taken online or in the classroom: **EHR 101** and **EHR 103**.

 **EHR 101 | EHR & ICS Basics for Office Staff** | *Classroom Optional*  
**4 hours** | 2, 2-hour sessions | *Intended as training for new front desk and EHR staff*

SESSION 1 | Getting Started with NextGen® EHR


- Setting user preferences; Navigating EHR; Viewing Patient Charts in EHR and ICS; Printing and Faxing from EHR and ICS; Phone Call Documentation; Inbox/Workflow Basics, including Viewing appointment list; Tasking; Patient status

SESSION 2 | Image Management

- Scanning; Categories; Filing

▶ **EHR 102 | EHR & ICS Basics Refresher Course | Office Staff**  
**2 hours** | 1, 2-hour session | *Intended for front desk and EHR staff*

- Topics to include: Viewing Patient Charts; Printing and Faxing; Phone Call Documentation; Inbox/Workflow; Image Management

 **EHR 103 | EHR Basics for Clinical Staff** | *Classroom Optional*  
**6 hours** | 3, 2-hour sessions | *Intended as training for new clinical staff*

SESSION 1 | Getting Started with NextGen® EHR

- Setting preferences; Navigating EHR; Inbox/Workflow Basics, including Viewing appointment list; Tasking; Patient status

SESSION 2

- Medications Module; Generating Chart & Exam Notes and Patient Letters; Printing and Faxing from EHR

SESSION 3

- Using Templates to Document Clinical History; Mock Patient Visits

▶ **EHR 104 | EHR Basics Refresher Course | Clinical Staff**  
**2 hours** | 1, 2-hour session | *Intended for clinical staff*

- Topics to include: Using Templates to Document Clinical History; Medications Module and E-Prescribing; Generating Chart & Exam Notes and Patient Letters; Printing and Faxing; Inbox/Workflow

▶ **EHR 201 | ePrescribing (eRx) | End-User Training**

**1.5 hours** | 1, 1.5 hour session | ***This course is complimentary***

*Intended for core team members, providers and clinical personnel using eRx*

- Introduction to Electronic Prescribing (eRx); Using eRx Services, including New Rx and Refills, Medication History, Formularies and Eligibility; Troubleshooting

▶ **EHR 202 | Family Practice/Internal Medicine Workflow**

**2 hours** | 1, 2-hour session | *Intended for clinicians and internal practice trainers*

- Review Adult Office Visit Workflow; Focus on Efficiency Tools

▶ **EHR 203 | Gynecology (GYN) Patient Encounter Workflow**

**2 hours** | 1, 2-hour session | *Intended for clinicians and internal practice trainers*

- Review GYN Office Visit Workflow; Focus on Efficiency Tools

▶ **EHR 204 | Obstetrics (OB) Patient Encounter Workflow**

**2 hours** | 1, 2-hour session | *Intended for clinicians and internal practice trainers*

- Review OB Office Visit Workflow; Focus on Efficiency Tools

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# EHR COURSE OFFERINGS

**EHR 202, EHR 203, EHR 204, EHR 205, EHR 206, EHR 207, EHR 208 and EHR 209** are intended for practices with **KBM 7.9** or above.

- ▶ **EHR 205 | Ophthalmology Patient Encounter Workflow**  
**2 hours** | 1, 2-hour session | Intended for clinicians and internal practice trainers
  - Review Eye Care Office Visit Workflow; Focus on Efficiency Tools
- ▶ **EHR 206 | Orthopedics Patient Encounter Workflow**  
**2 hours** | 1, 2-hour session | Intended for clinicians and internal practice trainers
  - Review Orthopedics Office Visit Workflow; Focus on Efficiency Tools
- ▶ **EHR 207 | Urology Patient Encounter Workflow**  
**2 hours** | 1, 2-hour session | Intended for clinicians and internal practice trainers
  - Review Urology Office Visit Workflow; Focus on Efficiency Tools
- ▶ **EHR 208 | Dermatology Patient Encounter Workflow**  
**2 hours** | 1, 2-hour session | Intended for clinicians and internal practice trainers
  - Review Dermatology Office Visit Workflow; Focus on Efficiency Tools
- ▶ **EHR 209 | Pediatrics Patient Encounter Workflow**  
**2 hours** | 1, 2-hour session | Intended for clinicians and internal practice trainers
  - Review Pediatrics Office Visit Workflow; Focus on Efficiency Tools
- ▶ **EHR 302 | Provider Approval Queue**  
**2 hours** | 1, 2-hour session | Intended for EHR end users
  - Topics to include: Designate items to be sent to PAQ (lab results, scanned images, patient documents); Review, accept, reject and reassign items in the PAQ, as well as add comments or send a new task from PAQ; Setup advanced PAQ options, including custom PAQ rules, PAQ out of office status and PAQ delegates.
- ▶ **EHR 303 | Advanced Tasking & Workflow Manager**  
**2 hours** | 1, 2-hour session | Intended for administrators, core team, and IT Staff
  - Topics to include: Overview and best practices of using Workflow Tasking and Workflow Manager; Overview of automation for delegating tasks to other staff during regular daily activity, vacation, or out of office; Understanding of EHR workflows; Prerequisite: On NextGen® v.5.6 or higher; Preferred: KBM 7.8 or higher
- ▶ **EHR 304 | Basic EHR Reporting** | Prerequisite of **EHR 305**  
**2 hours** | 1, 2-hour session | Intended for core team and administrators
  - Topics to include: Overview of the EHR reporting tool; Understanding reporting filters for clinical data; File maintenance reporting
- ▶ **EHR 305 | Advanced EHR Reporting Tool**  
**3 hours** | 1, 3-hour session | Intended for 1-2 people from EHR core group or other advanced EHR or technical staff
  - Topics to include: Designing Custom NextGen® EHR Report; Modifying Current Reports | Formatting; Sorting; Filtering; Generating Memorized Reports from EHR

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# OTHER COURSE OFFERINGS

All Supplementary Courses are held online. If you would like more information about our Supplementary Course offerings, please email [tsiuniversity@tsihealthcare.com](mailto:tsiuniversity@tsihealthcare.com) or call 800.354.4205.



- ▶ **RealMed® 101 | RealMed® Basics | Eligibility**  
**1 hour** | 1, 1-hour session | *Intended for new staff and staff new to RealMed®*
  - Topics to include: System navigation; Single eligibility check; Batch eligibility
- ▶ **RealMed® 102 | RealMed® Basics | Claims & Remittance (ERA)**  
**2 hours** | 1, 2-hour session | *Intended for new staff and staff new to RealMed®*
  - Topics to include: System navigation; Uploading files; Mapping payers; Fixing claim errors; Downloading & importing ERAs
- ▶ **RealMed® 103 | Basics Refresher Course | Claims, Remittance (ERA) & Eligibility**  
**2 hours** | 1, 2-hour session | *Intended for RealMed® end users*
  - Topics to include: System navigation; Uploading files; Mapping payers; Fixing claim errors; Downloading & importing ERAs
- ▶ **RealMed® 201 | Troubleshooting**  
**2 hours** | *Intended for practice managers and billing managers and staff*
  - Eligibility errors; Claim errors and claims-related eligibility errors; Secondary claim rejects; Missing remits; Timely filing requirement: How RealMed® can help
- ▶ **RealMed® 301 | Advanced Reporting**  
**2 hours** | *Intended for practice managers and billing managers, staff*
  - A/R and Status Management; RealMed® Reports: How and Why; Eligibility: How to Make it Work for Your Practice

## tsiUniversity PRICING



### CLASSROOM COURSES

**\$225 per hour per practice** | Includes up to four (4) attendees \$50 per hour for each additional attendee



### ONLINE COURSES

**\$225 per hour per practice** | One login, “unlimited” attendees \$50 per hour for additional logins | *Intended for practices with multiple locations*

**Note:** Course hours may be purchased up front without having to register for a specific course at that time. Course hours expire one (1) year after purchase.

Training classes are offered at a reduced rate to our Clients under the TSI Software Support Agreement. No refunds. Exchanges will be issued if request for cancellation occurs at least 7 business days in advance of scheduled class date. TSI Healthcare reserves the right to cancel classes with insufficient enrollment. Attendees will be notified of the cancellation and will be registered for the next available class. Upon receipt of completed registration form, an email or fax will be returned as confirmation. Complete payment is due 10 days after registration. Failure to make payment will result in registration cancellation.

For more information on TSI University and other client programs please contact:

[tsiuniversity@tsihealthcare.com](mailto:tsiuniversity@tsihealthcare.com)



# tsi university

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