Instructional Design Project: NextGen Advance Reporting

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EdTech 503 (Fall 2011)

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Master of Educational Technology Program

December 9, 2011

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Synthesis/Reflection Paper

Students have always been inquisitive and intuitive when it comes to learning but we now have a bigger responsibility to teach them to be a member of a learning organization that develops, adapts, and transforms itself to help them succeed in life and the modern workplace (Jukes, McCain, Crockett, 2010). The responsibility for educating the students of tomorrow is allowing a collaborative instruction, which is not only school educators, but by the business community working and discovering the best strategies for success to make a non-static technology-learning environment. Training should not be centered on technology, but on the way the human mind works using the technology (Atkinson & Mayer, 2004). Mother Nature is like instructional design it collects, processes, analyzes, and communicates a plan into action of what our water supply is going to be each year. However, that does not mean the plan fits everyone's needs or wants.

When it comes to the weather, Mother Nature can provide us happiness or sadness at any given time of the year if the plan works for us. Just as the way students or teachers react to the instructional design process of a course. Instructional design is about collecting and processing learning principles and then analyzeing the situations and problems to communicate a plan into action to support learners (Smith & Regan, 2004). This is why instructional design is imperative for creating a strong solid course. "For success in training, those new knowledge structures must be encoded into long-term memory in a way that allows them to be easily retrieved when it is needed on the job" (Clark & Mayer, 2008). For example, in this course we have been able to use many things that we understand and know today about our current jobs. To meet our learning goals in this class we have been given the ability to relook at a current project at work and make it better based on the new design principles we have learned.

The case study project, I found, was very interesting to reflect on how each of us approached fixing a training design problem differently. It really made me think about the importance of how instructional design must include all players in the project to make it a successful training course. Teachers are to focus on their students learning by knowing the content goals, the assessments to evaluate learning and the abilities and disabilities of the students. As for instructional designers, they are to analyze situations and problems, create a plan, and then manage the overall project implementation. As instructional designers or teachers, we must make sure we understand "what" hat we are wearing when creating and designing a course. Using the case study was valuable to me because I knew nothing about the content in my case study. Therefore, it was very easy to look at from as an instructional designer's point of view. However, I must admit, it has not been as easy to evaluate my own final project from a designer's perspective because I know the content so well.

One of my challenges, I realized after reviewing the feedback from classmates I did not considering the learning styles of learners. "Adult learning theory shows that people learn in different

ways; some are visual, some are auditory, and some are tactile or kinesthetic (Hamel, 2009)." Hamel's article made a very good point about business that it often sends an email to a group and believes the "training" on a subject makes the training complete. One of the most valuable things I have learned this semester is that instructional designers cannot just state in the plan "to train" it needs to have an assessment and evaluation of learners knowledge prior to creating the training. This makes me think, as stated by Hamel "lack of attention to individual's learning needs" could be the reason a number of organizational initiative failures happen every year.

My professional career in the medical field is a constant changing environment and on any given day policies and technology change that I must address. The content can be overwhelming to me at times and has made it difficult for me to keep up with the greatest and latest advances in the medical technology field. However, after working through my instructional design project, I know I have a better understanding on how to break it down and manage large training projects better. I have a passion for new and innovative ways for delivering training material, but I also must consider the viewing audience in my instructional design. I have always given a quiz at the being of my trainings to evaluate the aspects of my students' knowledge but never considered doing it online prior to creating the training. I will be using this approach more often now when creating new training classes. If the goal of performance is not clear for the student, the effectiveness and efficiency is not accomplished. Mother Nature constantly changes plans to meet the needs of nature just as instructional designers need to make sure they are changing their plans to meet the needs of their learners.

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Part 1. Topic

1a. Goal Statement

Learners will create, identify and organize patient demographic data into usable reports out of NextGen by themselves.

1b. Audience Description

This is for adult learners within the context of business professionals composed of front office, coders, billers, and clinic managers who are working in SAMG healthcare network. The learners will already have a wide range of experience working with: basic computer navigation, web browsers, Word, Excel, knowledge of NextGen's scheduling, billing and coding, and setting up different free software accounts. The learners will sign up for the self-pace online course through the current training calendar website.

1c. Rationale

Needs

The reporting in NextGen is so large and complex for our end users. I want to make it easier for them to understand how to run reports on their inputted system data. Many times, I am so busy with other troubleshooting matters I do not have a lot of time to be on the phone working with them on how to create a report. Anyone can run reports out of NextGen making this a good project for me. Many of our reports in the company have been made into memorized reports, which

are, just "point, click and run."

However, many times staff wants to run reports where they can change data elements to meet their wants and needs and possibly create reports we might have not thought of. This is why I want to create a three-hour self-pace online course on how to run different types of reports that medical group staff can create for themselves. Example of the example of the reports they would like to create are scheduling history, diagnosis codes treads, patient's no show history, insurance carriers' population reports, and demographic population reports. If a SAMG employee has basic knowledge about the different filters, totals, and types of reports, it will allow him/her to run these reports. There are about 45 different types of reports in NextGen and each report has a different filter set up. However, in the 3-hour course, I will not be covering all 45 reports; I will cover some of the patient demographic basic reports. Learners will be able to generate their own content that is appropriate for their particular job role and/or clinic after completing the course.

Major Instructional Strategy

The use of the generative instructional strategy allows learners the opportunity to build on prior learning, transfer, and process the events of instruction themselves with the low levels of instructor input. (Smith & Regan, 2005, p.141) One of the most important things to the adult learner considering continued education is 'how relevant' this will be for them. There will be about a 20 % of supplantive instruction involved because many of the learners will be novices at using some of the different filters tabs. For the supplantive instruction, I will be using instructional manuals embedded in the website for this instruction.

Why Use this Instructional Strategy?

The outcome of the NextGen Advance Reporting course is to utilize procedure strategies for instruction but the sub-skills are cognitive strategies. Creating the

course with this type of design creates a foundation for the learner to incorporate new ways to work their job tasks. After completing the course, the learners will be able to recognize a situation in which the reports are applicable, recall the steps they learned, apply the steps to perform and create the report and make decisions to create a usable report for their job role and clinic (Smith & Regan, 2005, p. 190). Learners should be able to compile knowledge and procedure experienced during the instruction (Smith & Regan, 2005, p. 197). This is self-pace online course because they will be able to review the material online and then run the report on the application at work to see if they interpreted the cognitive concept and procedure of running the report correctly.

Part 2. Analysis Report

2a1: Needs Assessment Survey

A survey was created for the potential learners to help with the analysis of the objectives of the course and evaluate entry level skills. I created online survey using Google Docs and is available to participants at the following link:

https://docs.google.com/spreadsheet/viewform?formkey=dFJyUVJ2WklzODFKeXlKLWZRMEtUSVE6MQ

The online survey had 16 questions, which collected information ranging from type of information they know about NextGen reports, computer skills, and the participant's interest in learning about learning to creating report using an online self-pace course. The survey was anonymous so there was no learner competition between co-workers in the medical group. The 12 participants chosen to take the survey had previously e-mailed me asking for more advanced training or I had assisted them in creating a report for their clinic. I sent two e-mails out to the 12 participants: first asking permission to be a part of the survey and second with the link to take the survey. It took approximately 5 minutes to complete the survey. All 12 participants said they would do the survey, but I only had 83% of the completion rate. See **Appendix A** for screenshots of the survey question.

2a2: Needs Analysis Data Report

NextGen Reports: The survey was conducted as yes or no questions to find out if the learner knows how to create their own reports out of NextGen. The 83 % of the participants who actually completed the survey indicated that 80 % of them had created their own reports in NextGen as seen in **Figure 1**.

Participants Creating NextGen Reports

30 %
80 %
Yes
No
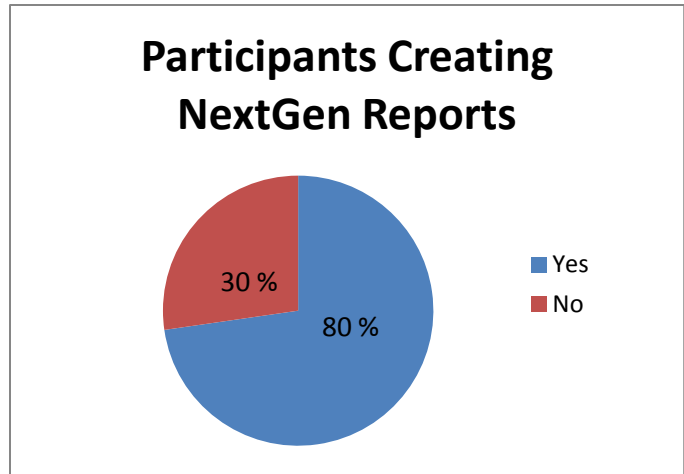
Figure 1

Types of NextGen Reports: The survey asked the participants what type of reports they used for their job function. The 83 % of the participants who completed the survey indicated scheduling and patient data reports are the most common used report. Insurance reports had a 70 % rate of being selected if the participant ran a report for their job function. Out of the selected reports types used for the survey for the participants to choose from, no report was not being used for a job function. See **Appendix B** for graph of Total Types of NextGen Report used results.

Participants' Internet and Software: The survey asked the participants many questions related to the participants Internet and software comfort level. The 83 % of the participants who completed the survey indicated that 90 % of them have used You-Tube to teach them how to do

Participants' Internet and Software Comfort Level

Total

90% Used You-Tube
60% Good Skills on the Internet
70 % Downloading Free Applications
80 % Would Take an Online Class
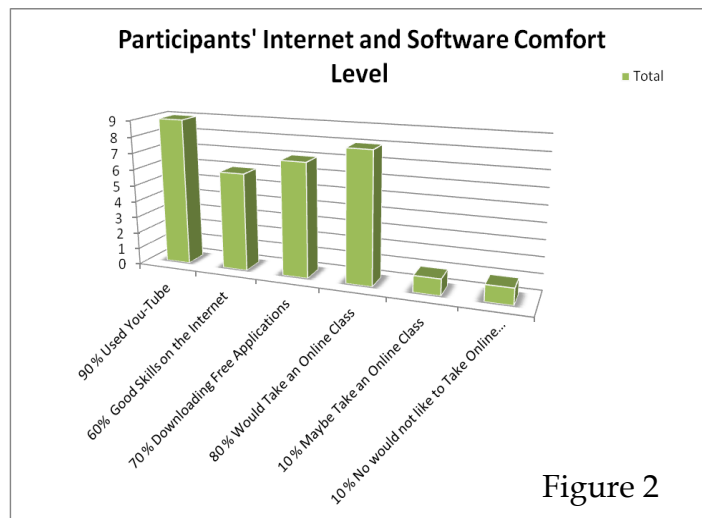10% Maybe Take an Online Class
10% No would not like to Take Online…

Figure 2

something. Only 40 % of the participants indicated they did not have strong Internet skills. Participants comfort level for downloading free applications was 70 % indicating a good set of comfort level participants can read instruction from the internet.

The majority of the participants indicated they would like to take an advanced reporting class online. However, only 10 % of the participants said they might take a class online or not take course online at all. Figure 2 show the full details of the participants' internet software comfort level.

2b: Description of the Learning Context

Learners are male and female work in Saint Alphonsus Medical Group (SAMG) clinics. However, the majority of the population in billing, management, coding office, and front office are females. The education levels range from high school graduate to MD. For many employees in the medical groups it is difficult for them to leave work and attend trainings offsite. The results of the survey indicated if online course were to be offered for the participants as self-pace course many would sign up. Factors that could influence SAMG clinic's employees from completing the online training would be overtime, meetings, and sickness.

2b1: Learning Context Description

In the survey, learners expressed a desire to take an advanced reporting training online as long as an instructor was available for support. The comments field on the survey indicated they want freedom to work through the lesson at their own pace without having pressing deadlines. It was also important for the learners to be able to apply the skills they are learning to their current job role. Given the nature of the subject, I wanted the learners to have the freedom to learn the material at their own pace but also have a contact for questions and feedback throughout the course.

The learners will be required to use handouts and checklists to help them work through the material because instruction will only be reading and listening vs. active teaching with teaching. The advantage of the course being online and accessible during work the learner will be able to use the handouts to run reports in their own clinic setting right after they have learned the new material. As indicated by many in our SAMG-IT courses today, learners have stated they want to apply new knowledge right through hands on experience.

In order to complete the course, learners will have to either access the site from their home or work computers. Each learner's connection access ranges from T-1 or DSL. Therefore, visuals and videos will be kept to a minimum to ensure that download speed is maximized.

NextGen will be the main application source for the online instruction other than the website. NextGen system application is maintained 24 hours, 7 days per week by TIS staff. Therefore, creating a self-pace course that utilizes NextGen makes it a perfect fit for SAMG clinic learners to use a self-pace design for completing each assignment. If the learners have problems, logging into NextGen learner will contact TIS staff. If the learners have problems with the online course, the learner will contact instructor via e-mail.

Learners will use two primary browsers to access the instruction. The instructional website will be able to be viewed in both Firefox and Internet Explorer. The learner's computer must support most current versions of either browser. The initial link needed for this course will all be located on SAMG-IT's website. All of the site will meet Priority 2 of the Web Accessibility Initiative, with the desire to meet as many Priority 3 checkpoints as possible.

Learner's instructors for the course will have training skills in Weebly, HTML, Snag-IT, Word, and Excel and be a NextGen Certified Professional (NCP) for EPM.

2b2: Transfer context Description

The SAMG clinic learners' will use this class as way to further their NextGen education benchmarks. The SAMG Network has a ladders program that encourages further growth for the staff to improve their current skills. If an employee has the motivation move up in the ladders program, they will attend training classes to demonstrate they want a ladders evaluation interview.
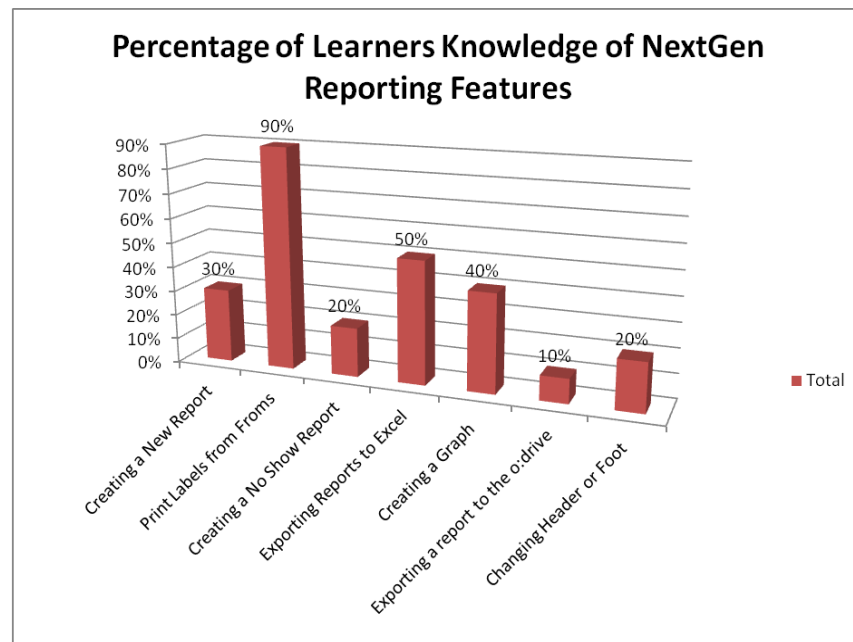
This course will have a direct impact for the SAMG clinic learners and the Network as a whole. NextGen has such a large data bank of patient information, it is important we use NextGen to find patient diagnosis tends. The more knowledge that each employee figure out about the reporting function in NextGen will increase the chances of the organization can improve patient care.

2c: Transfer Context

Given that the learner completed the NextGen new hire training, it is assumed that the learners will have an interest in advancing their skills with reporting out of NextGen to improve in their ladders program. The prior knowledge of the participants based on the 83 % of the participants who completed the survey, indicated that 100 % of them have the entry level stills to sign up for the NextGen Advance Reporting class.

The learners will be business professionals with backgrounds related to outpatient medical billing, coding, and scheduling. One of the goals of the survey was to ensure design of the course was not a repeat of information the learner already knew. The survey was able to identify what features and functionality that needed to be included in the course design.   The Percentage of Learners Knowledge of NextGen Reporting Features graph (**Figure 3)** demonstrates that almost all of the skills needed to create reports is under the 50 % mark of most participants. The group of employees surveyed was from all areas within the network. Given the skills across the network were the same for all employees based on the survey, my results would be valid why SAMG-IT trainers employees need training on NextGen reporting features and functionality. Having more SAMG employees with the ability to create their own reports will alleviate SAMG-IT trainers time.
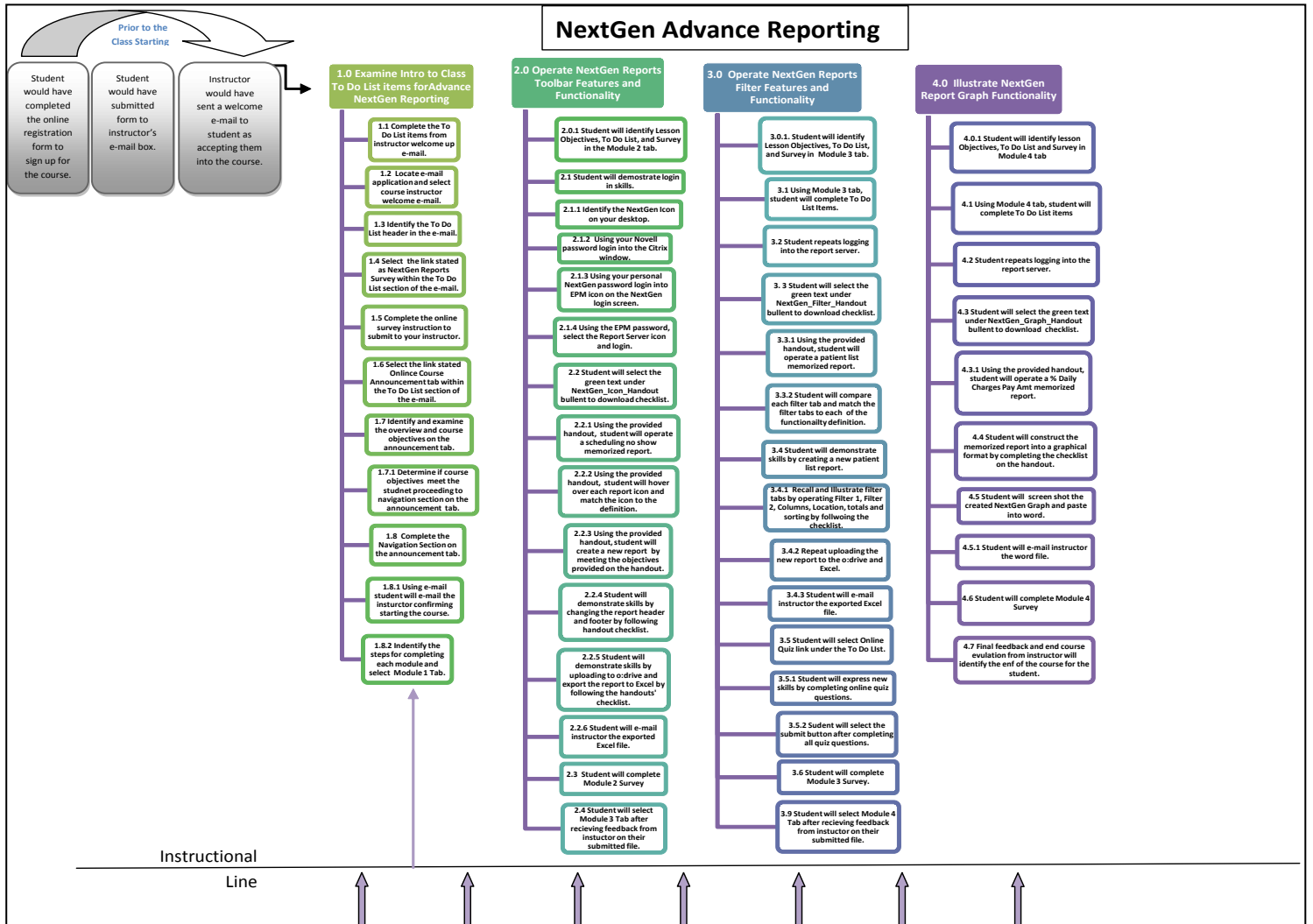
Figure 3

Percentage of Learners Knowledge of NextGen Reporting Features

NextGen Advance Reporting

2d: Task Analysis Flow Chart

Link or Download for: NextGen Advance Report Task Analysis Flow Chart http://bit.ly/rzJKQN

NextGen Advance Reporting

Prior to the Class Starting

Student would have completed the online registration form to sign up for the course.

Student would have submitted form to instructor's e-mail box.

Instructor would have sent a welcome e-mail to student as accepting them into the course.

1.0 Examine Intro to Class To Do List items for Advance NextGen Reporting

1.1 Complete the To Do List items from instructor welcome up e-mail.

1.2 Locate e-mail application and select course instructor welcome e-mail.

1.3 Identify the To Do List header in the e-mail.

1.4 Select the link stated as NextGen Reports Survey within the To Do List section of the e-mail.

1.5 Complete the online survey instruction to submit to your instructor.

1.6 Select the link stated Onlince Course Announcement tab within the To Do List section of the e-mail.

1.7 Identify and examine the overview and course objectives on the announcement tab.

1.7.1 Determine if course objectives meet the studnet proceeding to navigation section on the announcement tab.

1.8 Complete the Navigation Section on the announcement tab.

1.8.1 Using e-mail student will e-mail the instructor confirming starting the course.

1.8.2 Indentify the steps for completing each module and select Module 1 Tab.

2.0 Operate NextGen Reports Toolbar Features and Functionality

2.0.1 Student will identify Lesson Objectives, To Do List, and Survey in the Module 2 tab.

2.1 Student will demostrate login in skills.

2.1.1 Identify the NextGen Icon on your desktop.

2.1.2 Using your Novell password login into the Citrix window.

2.1.3 Using your personal NextGen password login into EPM icon on the NextGen login screen.

2.1.4 Using the EPM password, select the Report Server icon and login.

2.2 Student will select the green text under NextGen_Icon_Handout bullent to download checklist.

2.2.1 Using the provided handout, student will operate a scheduling no show memorized report.

2.2.2 Using the provided handout, student will hover over each report icon and match the icon to the definition.

2.2.3 Using the provided handout, student will create a new report by meeting the objectives provided on the handout.

2.2.4 Student will demonstrate skills by changing the report header and footer by following handout checklist.

2.2.5 Student will demonstrate skills by uploading to o:drive and export the report to Excel by following the handouts' checklist.

2.2.6 Student will e-mail instructor the exported Excel file.

2.3 Student will complete Module 2 Survey

2.4 Student will select Module 3 Tab after recieving feedback from instructor on their submitted file.

3.0 Operate NextGen Reports Filter Features and Functionality

3.0.1. Student will identify Lesson Objectives, To Do List, and Survey in Module 3 tab.

3.1 Using Module 3 tab, student will complete To Do List Items.

3.2 Student repeats logging into the report server.

3.3 Student will select the green text under NextGen_Filter_Handout bullent to download checklist.

3.3.1 Using the provided handout, student will operate a patient list memorized report.

3.3.2 Student will compare each filter tab and match the filter tabs to each of the functionality definition.

3.4 Student will demonstrate skills by creating a new patient list report.

3.4.1 Recall and Illustrate filter tabs by operating Filter 1, Filter 2, Columns, Location, totals and sorting by follwoing the checklist.

3.4.2 Repeat uploading the new report to the o:drive and Excel.

3.4.3 Student will e-mail instructor the exported Excel file.

3.5 Student will select Online Quiz link under the To Do List.

3.5.1 Student will express new skills by completing online quiz questions.

3.5.2 Student will select the submit button after completing all quiz questions.

3.6 Student will complete Module 3 Survey.

3.9 Student will select Module 4 Tab after receiving feedback from instuctor on their submitted file.

4.0 Illustrate NextGen Report Graph Functionality

4.0.1 Student will identify lesson Objectives, To Do List and Survey in Module 4 tab

4.1 Using Module 4 tab, student will complete To Do List items

4.2 Student repeats logging into the report server.

4.3 Student will select the green text under NextGen_Graph_Handout bullent to download checklist.

4.3.1 Using the provided handout, student will operate a % Daily Charges Pay Amt memorized report.

4.4 Student will construct the memorized report into a graphical format by completing the checklist on the handout.

4.5 Student will screen shot the created NextGen Graph and paste into word.

4.5.1 Student will e-mail instructor the word file.

4.6 Student will complete Module 4 Survey

4.7 Final feedback and end course evulation from instructor will identify the enf of the course for the student.

Instructional Line

NextGen Advance Reporting

Part 3. Planning

Part 3a. Learning Objectives (list)

1.0 Objective- Examine Intro to Class To Do List items for Advance NextGen Reporting

1.1 Explain your history working with NextGen reports in the past and discuss your future goals after completing the class.

1.2 Given a student will open their e-mail application; student will read the course instructor's welcome e-mail.

1.3 Using the e-mail the student will identify the To Do List header in the e-mail.

1.4 Given the specific URL for the survey within the To Do List, student will select the link stated as NextGen Reports Survey within the To Do List section of their e-mail.

1.5 Using the online survey, student will all survey question and follow instruction to submit to course instructor.

1.6 Given the specific URL for the online course, student will select the link stated Online Course Home tab within the To Do List section of their e-mail.

1.7 Given the Announcement page, student will identify and examine the overview and course objectives under the announcement tab.

1.7.1 Using the provided information in the announcement tab, student will determine if course objectives meet the student proceeding to navigation section on the announcement tab.

1.8 Using given information from the Announcement page, student will translate the Navigation section to proceed to taking the course.

1.8.1 Using e-mail the student will e-mail the instructor confirming they have started the course.

1.8.2 Using provided information under the Navigation section of the Announcement page, student will indentify the steps for completing each module and then select Module 1 Tab.

2.0 Objectives- Operating NextGen Reports Toolbar Features and Functionality

2.0.1 Using the given information on the Module 1 tab, student will identify lesson objectives, To Do List, and Survey in the Module 2 tab.

2.1 Given the appropriate passwords for accessing the computer resources, student will demonstrate login in skills.

2.1.1 Given the NextGen icon on the student's desktop, student will identify the NextGen Icon on their desktop and double click.

2.1.2 Given the appropriate Citrix password and security, student will enter their Novell password into the Citrix window.

2.1.3 Given the appropriate NextGen password and security, student will use their personal NextGen password and login into EPM icon on the NextGen application launcher screen.

2.1.4 Using the NextGen EPM password, student will select the Report Server icon on the application launcher screen and login.

2.2 Student will select the green text under NextGen_Icon_Handout bullent to download a word document that is a checklist of items for the student to demonstrate.

2.2.1 Using the provided handout, student will operate a scheduling no show memorized report.

2.2.2 Using the provided handout, student will hover over each report icon and match the icon to the definition that is listed on the handout.

2.2.3 Using the provided handout, student will create a new report by meeting the objectives provided on the handout.

2.2.4 Student will demonstrate skills by changing the report header and footer by following handout checklist.

2.2.5 Student will demonstrate skills by uploading to o:drive and export the report to Excel by following the handouts' checklist.

2.2.6 Given the student uses their own e-mail, student will e-mail instructor the exported Excel file.

2.3 Given the module 1 tab, student will complete Module 2 survey.

2.4 Student will select Module 3 Tab after receiving feedback from instructor on their submitted file.

3.0 Objective--Operate NextGen Reports Filter Features and Functionality.

3.0.1. Student will identify lesson objectives, To Do List, and survey in Module 3 tab.

3.1 Using Module 3 tab, student will complete To Do List Items.

3.2 Student repeats logging into the report server.

3. 3 Given the appropriate To Do List items, student will select the green text under

NextGen_Filter_Handout bullent to download checklist.

3.3.1 Using the provided handout, student will operate a patient list memorized report.

3.3.2 Student will compare each filter tab and match the filter tabs to each of the functionality definition.

3.4 Student will demonstrate skills by creating a new patient list report.

3.4.1 Recall and Illustrate filter tabs by operating Filter 1, Filter 2, Columns, Location, totals and sorting by following the checklist.

3.4.2 Repeat uploading the new report to the o:drive and Excel.

3.4.3 Student will e-mail instructor the exported Excel file.

3.5 Student will select Online Quiz link under the To Do List.

3.5.1 Student will express new skills by completing online quiz questions.

3.5.2 Given student is completed with online quiz, student will select the submit button after completing all quiz questions.

3.6 Given working on Module 3 tab, student will complete Module 3 Survey.

3.9 Student will select Module 4 Tab after receiving feedback from instructor on their submitted file.

4.0 Objective Illustrate NextGen Report Graph Functionality

4.0.1 Student will identify lesson objectives, To Do List and survey in Module 4 tab.

4.1 Using Module 4 tab, student will complete To Do List items.

4.2 Student repeats logging into the report server.

4.3 Student will select the green text under NextGen_Graph_Handout bullent to download checklist.

4.3.1 Using the provided handout, student will operate a % Daily Charges Pay Amt memorized report.

4.4 Student will construct the memorized report into a graphical format by completing the checklist on the handout.

4.5 Student will screen shot the created NextGen Graph and paste into word.

4.5.1 Student will e-mail instructor the word file.

4.6 Student will complete Module 4 Survey

4.7 Final feedback and end course evaluation from instructor will identify the end of the course for the student.

Part 3b. Matrix of Objectives, Bloom's Taxonomy, and Assessment Plan.

Performance Assessment Plan for NextGen Reporting

Based on Bloom's Taxonomy of Instructional Objectives

Learning Objectives	Bloom's Taxonomy Classification	Format of Assessment	Description of Test Form	Sample Items
1.0 Objective- Examine Intro to Class To Do List items for Advance NextGen Reporting				
1.1	Knowledge, Application & Evaluation	Paper and Pencil	Short Answer	Explain the history of working with NextGen reports in the past and discuss your future goals after complete the class.
1.2	Comprehension	Recognition Items	Directions	Given a student will open their e-mail application; student will interpret the instructor's welcome e-mail.
1.3	Comprehension	Recognition Items	Directions	Using the e-mail the student will identify the To Do List header in the e-mail.
1.4	Application	Performance	Demonstration of the skills to instructor	Given the specific URL for the survey, student will select and operate the link stated as NextGen Reports Survey within the To Do List section of their e-mail.

1.5	Application	Performance	Multiple choice	Using the online survey, student will all survey question and follow instruction to submit to course instructor.
1.6	Application	Performance	Demonstration of the skills to instructor	Given the specific URL for the online course, student will select the link stated and operate Online Course Home tab within the To Do List section of their e-mail.
1.7	Analysis and Comprehension	Recognition Items	Directions	Given the Announcement page, student will identify and examine the overview and course objectives under the announcement tab.
1.7.1	Evaluation	Paper and Pencil	Short Answer	Using the provided information in the announcement tab, student will determine if course objectives meet the student proceeding to navigation section on the announcement tab by e-mailing instructor an answer.
1.8	Application	Performance	Demonstration of the skills to instructor	Using given information from the Announcement page, student will translate the Navigation section to proceed to taking the course.

1.8.1	Application	Performance	Demonstration of the skills to instructor	Using e-mail the student will e-mail the instructor confirming they have started the course.
1.8.2	Evaluation	Evaluation of Performance	Directions	Using provided information on under the Navigation section of the Announcement page, student will indentify the steps for completing each module and, then select Module 1 Tab.
2.0 Objectives- Operating NextGen Reports Toolbar Features and Functionality				
2.1	Application	Performance	Demonstration of the skills to instructor	Given the appropriate passwords for accessing the computer resources, student will demonstrate login in skills.
2.0.1	Application	Performance	Directions	Using the given information on the Module 1 tab, student will identify lesson objectives, To Do List, and Survey in the Module 2 tab.
2.1.1	Application	Performance	Demonstration of the skills to instructor	Given the NextGen icon on the student's desktop, student will identify the NextGen Icon on their desktop and double click.

2.1.2	Application	Performance	Demonstration of the skills to instructor	Given the appropriate Citrix password and security, student will enter their Novell password into the Citrix window
2.1.3	Application	Performance	Demonstration of the skills to instructor	Given the appropriate NextGen password and security, student will use their personal NextGen password and login into EPM icon on the NextGen application launcher screen.
2.1.4	Application	Performance	Demonstration of the skills to instructor	Using the NextGen EPM password, student will select the Report Server icon on the application launcher screen and login.
2.2	Application	Performance	Demonstration of the skills to instructor	Student will select the green text under NextGen_Icon_Handout bullet to download a word document that is a checklist of items for the student to demonstrate.
2.2.1	Application	Simulation	Checklist	Using the provided handout, student will operate a scheduling no show memorized report.

2.2.2	Synthesis, Application, & comprehension	Paper and Pencil	Fill-in-blank and matching	Using the provided handout, student will hover over each report icon and match the icon to the definition that is listed on the handout.
2.2.3	Application	Simulation	Demonstration of the skills to instructor	Using the provided handout, student will create a new report by meeting the objectives provided on the handout.
2.2.4	Application	Simulation	Demonstration of the skills to instructor	Student will demonstrate skills by changing the report header and footer by following handout checklist.
2.2.5	Comprehension, Knowledge, Application	Simulation	Demonstration of the skills to instructor	Student will demonstrate skills by uploading to o:drive and export the report to Excel by following the handouts' checklist.
2.2.6	Knowledge, Application & Evaluation	Recall Items	Demonstration of the skills to instructor	Given the student uses their own e-mail, student will e-mail instructor the exported Excel file.
2.3	Application	On-the-Job Performance	Demonstration of the skills to instructor	Given the module 1 tab, student will complete Module 2 survey.
2.4	Application	Performance	Directions	Student will select and operate Module 3 Tab after receiving feedback from instructor on their submitted file.

3.0 Objective- Operate NextGen Reports Filter Features and Functionality.				
3.0.1	Application	Performance	Directions	Student will identify lesson objectives, To Do List, and survey in Module 3 tab.
3.1	Application	Performance	Demonstration of the skills to instructor	Using Module 3 tab, student will complete To Do List Items.
3.2	Knowledge	Performance	Demonstration of the skills to instructor	Student repeats logging into the report server.
3. 3	Application	Performance	Demonstration of the skills to instructor	Given the appropriate To Do List items, student will select the green text under NextGen_Filter_Handout bullet to download checklist.
3.3.1	Application	Performance	Demonstration of the skills to instructor	Using the provided handout, student will operate a patient list memorized report.
3.3.2	Analysis and Comprehension	Pencil-and-Paper	Matching and Fill-in-blank	Student will compare each filter tab and match the filter tabs to each of the functionality definition.
3.4	Evaluation and Application	Simulation	Demonstration of the skills to instructor	Student will demonstrate skills by creating a new patient list report.
3.4.1	Evaluation, Knowledge and Application	Simulation	Checklist	Recall and Illustrate filter tabs by operating Filter 1, Filter 2, Columns, Location, totals and sorting by following the

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				checklist.
3.4.2	Knowledge	Performance	Directions	Repeat uploading the new report to the o:drive and Excel.
3.4.3	Evaluation, Knowledge and Application	Performance	Demonstration of the skills to instructor	Student will e-mail instructor the exported Excel file.
3.5	Application & Knowledge	Performance	Directions	Student will select and operate Online Quiz link under the To Do List.
3.5.1	Synthesis	Constructed Answer Items	Short Essay	Student will express new skills by completing online quiz questions.
3.5.2	Application & Knowledge	Performance	Directions	Given student is completed with online quiz, student will select the submit button after completing all quiz questions.
3.6	Application	Pencil-and-Paper	Test	Given working on Module 3 tab, student will complete Module 3 Survey.
3.9	Application	Performance	Directions	Student will select Module 4 Tab after receiving feedback from instructor on their submitted file.
4.0 Objective- Illustrate NextGen Report Graph Functionality				
4.0.1	Application	Performance	Directions	Student will identify lesson objectives, To Do List and survey in Module

				4 tab.
4.1	Application	Performance	Demonstration of the skills to instructor	Using Module 4 tab, student will complete To Do List items.
4.2	Knowledge	Performance	Demonstration of the skills to instructor	Student repeats logging into the report server.
4.3	Application	Performance	Demonstration of the skills to instructor	Student will select the green text under NextGen_Graph_Handout bullet to download checklist.
4.3.1	Application	Performance	Demonstration of the skills to instructor	Using the provided handout, student will operate a % Daily Charges Pay Amt memorized report.
4.4	Knowledge, Application and Synthesis	Simulation	Checklist	Student will construct the memorized report into a graphical format by completing the checklist on the handout.
4.5	Knowledge, Application and Synthesis	Simulation	Demonstration of the skills to instructor	Student will screen shot the created NextGen Graph and paste into word.
4.5.1	Knowledge and Application	Performance	Demonstration of the skills to instructor	Student will e-mail instructor the word file.
4.6	Application	Performance	Demonstration of the skills to instructor	Student will complete Module 4 Survey

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4.7	Evaluation	Performance	Explanation of the student's evaluation to the instructor, to also include verification by the instructor.	Final feedback and end course evaluation from instructor will identify the end of the course for the student.

Part 3c. ARCS Table

ARCS Motivational Strategies Plan

Project Goal Statement: Learners will create, identify and organize patient demographic data into usable reports out of NextGen by themselves.

Learning Objectives

- Manipulate data in NextGen into number values.
- Organize your items into quick retrievable and reviewable categories for maintaining an efficient report.
- To process all the items you have in NextGen reporting tool and make decisions prior to creating a report.
- Organize your items into quick retrievable and reviewable categories for maintaining an efficient spreadsheet using NextGen Reports functionality.
- Work through a case study scenario to create a different NextGen reports.

ATTENTION
A.1 Perceptual Arousal
> The instructor will do a short demo of how easy it is to create a report by using NextGen Report features and functionality. The demo will be video posted on the SAMG-IT website to gain interest for employee to sign up for class.
A2. Inquiry Arousal
>Permit learners to select different NextGen data to create reports that allows them to facilitate the areas

of reporting they would like to learn and grown in their own jobs.

>Small case study will be used along with a checklist to guide and challenge the learner.

A3. Variability

>Instructor provides constructive feedback in a timely manner throughout the course by having the leaner submit the completed report and the online quiz.

>The course will be self-directed online course so the leaner has time to apply the learning objectives to their current work environment. The online course is designed as instruction for the course but instructor will be the contact for technical problems, feedback on assignments and directing the start and end of the course.

RELEVANCE

R1. Goal orientation

>Announcement with directions to the lesson overview and any needed information for the learner will be in each module's webpage.

>Within the announcement page, will have the lesson overview, student's To Do List, and what is needed for assignment submission.

R2. Motive matching

>To Do List will emphasize key points and guidance for the student.

>Additional cases or examples will be provided in the exact credit area on the To Do List as opportunities for retention.

R3. Familiarity

>Learners will be able to save, modify and run these reports for their current job roles.

>Leaners will be directed to read overview of the lessons and directions for completing the assignments in each web page tab.

>To Do List will emphasize the key points and guidance for the learner.

CONFIDENCE

C1. Learning requirements

>Present opportunities for practice by having them use checklists to create reports.

>Will have an online quiz to evaluate the different data elements the student will learn.

C2. Success opportunities

>The learner will completed a series of To Do Lists handout to help them to create a report or answer question on an online quiz.

>At the end of the course, learner will be able to work through NextGen reporting and work a reporting

scenario.

>The learners must complete each To Do List on each tab in order to move to the next webpage tab. This will verify they have competence needed for the next tab because each tab requires a checklist, quiz, survey and instructor feedback.

C3. Personal control

>Quizzes will provide feedback right away after the learner completes the quiz.

>Instructor will provide feedback and answers to questions via e-mail.

SATISFACTION

S1. Natural consequences

>Will encourage continued learning by allowing the students to give case studies, checklist ideas, or video to enhance the class for the next set of students.

> Will provide a class survey

S2. Positive consequences

>Exact credit will be used for learners who want to experiment with adding new content to the course.

>Permit learners to suggest different assessments that could help the goal of the content.

S3. Equity

>Instructor provides constructive feedback in a timely manner throughout the course.

>The provided quizzes online will provide fast and effective feedback timely for each student.

Keller, J. M. (1987). The systematic process of motivational design. Performance & Instruction, 26 (9/10), 1-8.

Part 4. Instructor Guide

The instruction of the NextGen Advance report is web based for the learners. **Figure 3** is a flowchart that shows the sequential steps the learner must achieve to complete the course. The instructor should use the flowchart for directing the student from Point A (start of instruction) to point B (end of the instruction) when building the website content. For a downloadable Instructor Guide Flowsheet as seen in **Figure 4** please visit this link: http://idedtech503advancereporting.weebly.com/id-design.html.

Instructor Guide Flowchart
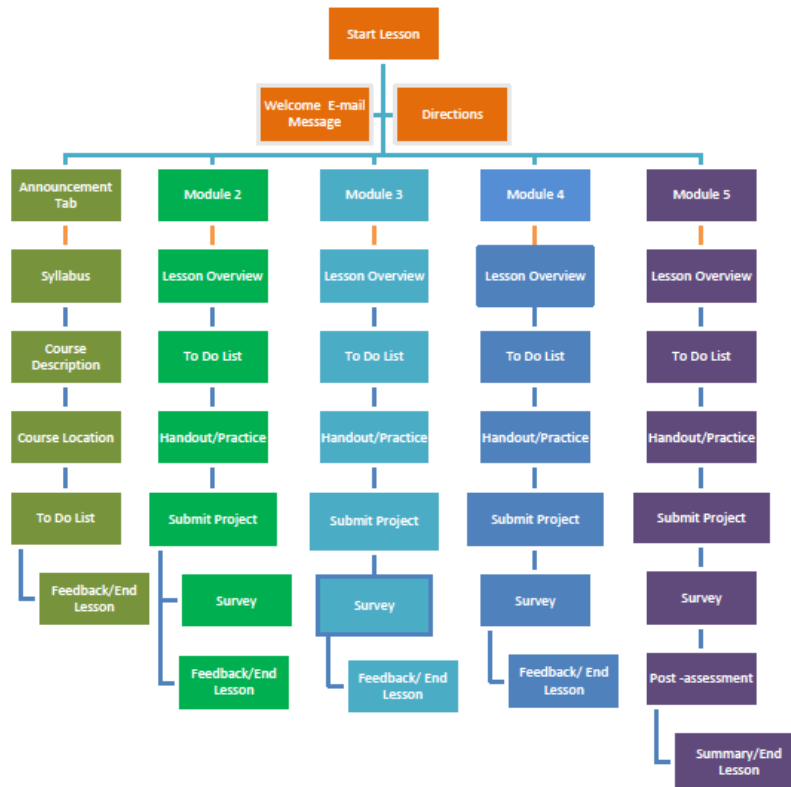
Figure 4

Introduction

Active Attention or Gain Attention

1. The instructor will use the Google doc. survey link below for the class to take prior to starting the class.

   - Link: **http://bit.ly/uIPWnQ**

2. The instructor must create a Weebly website.

   - Link: **http://www.weebly.com**

   - A great amount of learners control will be used for this course. An open navigation system needs to be designed for the online course.

   - The same layout, icons, and graphics will identify the links and buttons the

student must use.

- Announcement page will guide the students' navigation to start the To Do List for each module tab.

- Announcement page will contain answers to common questions and where to e-mail the instructor.

- Create 4 tabs in on the Weebly website: Announcement, Home, Module 1, Module 2, Module 3, Module 4

- See **Appendix C** for a screen shot of the one of the tabs general layout. However, you can see the link below for all the website modules layouts for ideas for your course.

- **http://idedtech503advancereporting.weebly.com/index.html**

Establish Purpose or Inform Learners of Purpose

1. Instructor will need to post the class on the communication tool (SAMG-IT website) with the request form. Quick video of how to create reports will already be posted for the instructor. The video will be a tactic for getting attention arousal from participants to sign up for the course.

2. See **Appendix D** for example of Syllabus I created. However, you can use the following link below for a useable Syllabus to download and change with your information as an instructor. The topic heading is listed as NextGen Reporting Instructor Syllabus Guide.

   - **http://idedtech503advancereporting.weebly.com/id-design.html**

3. Announcement tab must be created to direct the learners where to start the course.

4. Within each tab should display the Course Overview, To Do List, instruction manuals and downloadable handouts.

5. See **Appendix E, F, and G** for examples of handouts created for the course. However, you can use the following link below for all downloadable handouts. The topic heading is listed as NextGen Reporting Instructor Handouts on the ID Tab.

6. The To Do List should include the learning task, objective, outcome level and

assessment item. All handouts and instructional manuals will be provided to the instructor to use and modify from Lindy Hagedorn.

- Example:

  Lesson Objective: Student will operate NextGen's reports toolbar features and functionality

  To Do List:

  - Task 1: Download Handout into word. With the following link……

  - Task 4: Using the handout, complete all the following directions and task listed within the handout.

  - Task 5: Using the toolbar icon print preview, student will perform a screen shot of the first page of the report after it displays. Paste the screen shot into Word.

  - Task 6: E-mail me at lindyhagedorn@u.boisestate.edu with the word document attachment.

  - Task 7: E-mail me the exported file you created in Excel.

  - Task 8: Complete the survey below…

Arouse Interest and Motivation or Stimulate Learners' Attention/Motivation

1. The instructor will create a quiz on Weebly that challenges the learner to know different parts of the report filter.

   a. Example: What is the difference between filter 1 and filter 2?

2. The instructor will post the instructional manual on how to operate a Patient List, Charge Pay Amt, Patient no show-memorized reports. (These instructional manuals are on the same link that was provided above.)

3. The instructor will create a multiple-choice test that helps the learner to recognize different parts of the NextGen filter using Weebly survey tool.

Preview the Learning Activity or Provide Overview

1. The instructor will embed checklist and handouts onto the Weebly website from material created by Lindy Hagedorn.

2. Create a survey module 1, 2, 3, & 4 tab. The survey questions should be designed to find out about the student's job role, what improvements they would like to see for the future of the course.

3. The instructor will create instructions on how to submit the learners completed reports. This information should be included on each of the modules.

Body

Recall relevant prior knowledge or Stimulate recall of prior knowledge

1. The online survey and online quizzes will help the instructor to have a good understanding if the students are recalling prior knowledge or if they are novice learner.

2. The instructor will give the class survey presented at the beginning of the course for the students to take again at the end of the course to evaluate the prior knowledge skills with the current skills they have at the end of the course.

Process information and examples or Present information and examples

1. Instructor will use the handout created by Lindy Hagedorn to help the student examine the NextGen different reports you can run in NextGen.

    a. Example:

        • Scheduling No Show Report

        • Patient List

        • Charges Pay Amt

2. Instructor will create an interactive multiple-choice quiz by using different report terms.

    a. Totals

    b. Filter 1 and 2

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      c.   Events

      d.   Resources

      e.   Process Date, Post Date, Current Date

      f.   Columns

3. Instructor will create navigation instructions on the Home tab under the To Do List.

4. Instructor will create a password on Home page. This password will be sent out to the student after meeting all criteria for starting the course.

5. Instructor will use the downloadable handout for the learner to fill out after running the sample report. (Handouts provide on the same link mention above for the instructor to use.)

      a.   Example Questions:

- Change filter 1 to all to Date. Download Report

- Change Filter 2 age tab to 2 and above. Download Report

- Change the totals to sorting all of one column. You choose which one and then download the report.

6. Instructor will link the downloadable checklists for the learner to use on the website.

      a.   Sample Checklist:

         i.   Run the sample report under the report icon.

         ii.   Click the Excel icon.

         iii.   Save in the o:drive

         iv.   Close NextGen

         v.   Open Excel and navigate to the o:drive

         vi.   Open the excel report

         vii.   Change filters to sort the report by patient date of birth

       viii.   Save the report in your u: drive.

Focus Attention or Gain & Direct Attention

1. Instructor will provide project guidelines and rubric for the learner to self-check their work.

    a. Example:

Checklist Sample Report Activity			
	Excellent 90%- 100%	Adequate 70%-89%	Insufficient 0%-69%
Completeness 40 Points	The assigned topic is completely answered as required showing an understanding of the subject. Answers are of quality and are detailed.	The assigned topic is mostly answered as required showing an understanding of the subject. One or two answered may be minimal or lacking in detail.	The assigned topics are answered minimally, lack quality and detail, and some questions are not answered at all.
Technical 10 Points	All questions answered are free of grammatical and spelling errors. There are no technical issues with viewing the assignment.	There are one or two grammatical and spelling errors. There are one or two technical issues the viewing of the assignment is not hindered.	There are many grammatical and spelling errors and/or the assignment is not easily viewable.

Employ Learning Strategies or Guide or Prompt Use of Learning Strategies

1. Instructor will permit learners to select other reports that might relate to their personal or professional interest to work on during the course.

2. Instructor will permit learners to suggest different assessments that could help the goal of the content.

3. The same layout, icons, and graphics will help the prompt the learners to stay on task between the different modules.

4. The Announcement page will guide the learners' navigation to correct To Do List for each module.

Practice or Provide for and Guide Practice

1. The online quizzes, handout and checklist will guide the learners' activities.

2. All students will be required to review their feedback from the instructor. This will help the student to understand their errors creating the report.

3. Evaluate Feedback or Provide Feedback

4. Instructor must have a valid e-mail address posted to the website for the students to be able to submit assignments to and ask questions to

5. Instructor must provide project guidelines mentioned above in order to provide good feedback to learners.

6. Instructor must make online quizzes that have feedback immediately so learners can address their learning right way.

7. Survey must be provided after each module tab in order to evaluate the students learning and the instructor's course.

Conclusion

Summarize and review or Provide summary and review

1. Instructor must provide wrap-up remarks about the main points of the lessons when the learner has finished the course. Since this is a self-pace course, it will allow the learner to reflect back on what they have learned and what they will be able to do in their current job with the new skills.

2. Instructor must provide additional cases or examples of reports to further the learners' education.

3. Instructor must provide additional resources or link for the learner.

Transfer learning or Enhance transfer

1. Instructor needs to send out a survey to learners to be taken at the being of the beginning class. This will help the instructor find out if the new knowledge has transformed them into being able to create and run reports on their own after completing the course.

2. Re-motivate and Close or Provide Remediation and Closure

3. Instructor will encourage continued learning by allowing the learners in the course to give feedback, case studies, or ideas to enhance the class for next set of students.

Assess Learning or Conduct Assessment Evaluate

1. The instructor will evaluate each learner by using the online quizzes and/or grading rubric posted on the To Do List of module tab 1, 2, 3 and 4.

2. Feedback and Seek Remediation or Provide Feedback and Remediation

3. All students will be required to review assessments and their corresponding response to understand their errors.

4. At the end of the course, the learner will be able to work through a case study report scenario without an IT person help.

Part 5. Learner Content

Part 5a. Learning materials

1. Weebly Website: The link below is a video and information on how to build a Weebly Website:

    *   http://lindysedtech522.weebly.com/course-build.html

2. NextGen Reporting Online Course: The link below provides an example of how to set up your own course. Also on the ID page provides you the necessary handouts needed for you to lead the online course.

    *   http://idedtech503advancereporting.weebly.com/id-design.html

Part 5b. Formative and/or Summative Assessment materials

Formative Evaluation Assessment Tool can be downloaded at: **http://idedtech503advancereporting.weebly.com/id-design.html**. This is for the instructor to recognize if the student is ready to take the NextGen Advance Reporting course online. The student must achieve 90 % of yeses in order to be a good candidate for the course. The online survey the student must complete in order to get a password for the home page could be used to help answer the assessment tool questions. If the survey does not meet the entire assessment question, instructor should ask them in an e-mail. **Appendix H** provides a screen shot of the assessment.

Summative Evaluation Assessment Tool can be downloaded at:

http://idedtech503advancereporting.weebly.com/id-design.html. This is for the

instructor to recognize if the student is ready to complete the course for NextGen

Advance Reporting. The student must achieve 80 % of yeses in order to pass the

course. If the student fails to pass the course they have a choice to retake the course. If

student does pass the course all the feedback, quiz grade and student's self-evaluation

will be submitted to the student's supervisor. **Appendix I** provides a screen shot of the

assessment.

Part 5c. Technology Tool Justification

The students will be using their PC at work and at home. All the required technology for

the online course is loaded on the student's desktop at work; for a list of the Technology

Tool on their desktop see **Figure 5** below. If the students working on the online course

from home, they will be able to use remote access program. The remote access program

will allow the students to have the same function and features as their desktop at work

provides.

Technology Tool Justification	
Tool	**Justification**
Computer	Using a computer for this class is needed because the entire course is based on a computer application program called NextGen.
NextGen Application	NextGen is the practice management system the SAMG network using for all clinic functions. It very important the learners feel competent in using NextGen.
Weebly	I chose Weebly because it an easy program for anyone to build a website. I also created a video tutorial, I think this would be helpful for any instructor who is going to use my ID project. The templates that you have to work with in Weebly look professional without a lot of work. Weebly also allows for uploading handouts, videos, and surveys which some of the other website building program do not allow.

Word	Word allows for the student to have a place to post their screen shot and then create an attachment that can be sent to their instructor.
Excel	Excel is needed for the student to be able to download data out of NextGen.
Any E-mail application	E-mail is used as the main source of communication between the instructor and the student. E-mail is also the only way the student can submit assignments to the instructor.
Adobe Reader	Adobe Reader is used for viewing and printing the student's handout on Weebly website.

Figure 5

Part 6. Formative Evaluation Plan

Evaluation Overview

The Formative Evaluation Plan sections contain information determining if the value or worth of the NextGen Advance Reporting course achieves instructional goals and usability of the course. The effectiveness and efficiency is the primary evaluation concern for the stakeholders with a secondary interest in the course appeal. The stakeholders are Lindy Hagedorn, Director of IT, and CAO.

For the stakeholders, the following evaluation concerns are the most importance:

1. Ensure that learners have the opportunity to build on prior learning, transfer, and process the events of instruction themselves with low levels of instructor input when it comes to building a NextGen report.

2. Find out whether participants are effective with a web-based delivery vs. classroom training.

3. Identify the time intensiveness for both instructor and participants.

Part 6a. Expert Review

My subject matter expert is Katie Cawthra who is NextGen certified. Katie comes with 8 years of experience working with NextGen in the medical field, and is the supervisor over the SAMG-IT trainers department. Katie has a good knowledge base for what the learner in the SAMG network need for creating addition patient reports. The evaluation form is available in part 7, and the experts completion form is in Appendix D. The form and Instructional Design Project-NextGen Advance Reporting was submitted to Katie on 12/7/2011, and returned on 12/11/2011.

Part 6b. One-to-One Evaluation

For the instructional materials, I would bring together two students that have taken reports training in my classroom setting before and two instructors from my department; I would have separate one-on-one sessions with each one of them. My goal with having two sets of different learners is to make sure that it has a level of expertise while ensuring that I have not missed basic levels needed in the material. We would use the training room for working through the material, that way we can markup any changes that are needed on the material right then. I will ask the learners to work through each of the handout checklist to ensure all the steps have been documented accordingly for the students.

Key questions during the one-on-one sessions would include:
1. Does the learner understand the instructions?
2. Does the terminology make sense? Can you suggest any improvements?
3. Do learners understand what is needed for navigation through the course?
4. Does the learners know what is expected of them to complete in each Module?
5. Do any of the steps seem out of sync? Would you recommend any changes?
6. Are the instructor manuals useable for other instructors to embed into the Weebly webpage.
7. Is the syllabus clear for the student to start the course?
8. (Open ended) Are there any other obvious errors in the course?

Part 6c. Small Group Evaluation

I would test two instructors with the course, taking myself out of the equation. The two instructors would work through the material on their own, and then report to me their feedback with the following questions.

Goals
1. Are course goals relevant to learns?
2. End-user survey

Content
1. Is the content presented in an interesting way?
2. Is the content challenging to the learner?

Technology
1. Are typographical, spelling, grammar, punctuation errors distracting?
2. Is navigation easy?
3. Is the website intuitive?
4. Can the website be easily managed by instructor?

Message Design

1. Is the vocabulary level and tone appropriate for the content and audience?
2. Are the handouts uncluttered and with plenty of white space?
3. Is the color, typeface, emphasis used appropriately and to enhance learning?
4. Are the graphics and wording clear?
5. Are the flowcharts, Assessments tools appropriate to the content and goals?

Effectiveness

1. How did final project meet course objectives?
2. Do you think the learners believe doing an online course is worth attending?

Efficiency

- Does is the time more demanding for the trainer to use an online course?

Part 6d. Field trial

My co-worker Teri will conduct the field trial and the students will be new employees into our department. Teri has never taught the reports training class and is not as familiar with the functionality of the NextGen reporting. I think, this will be a very good field trail because she can examine the ID project from a different perspective than if I were to teach the class.

The field trail will allow for revision based on the following questions:

1. Can the instruction be implemented as it was designed?
2. What types of administration problems are encountered?
3. Does the teachers/trainer guide present the needed information in a form that can be easily used?
4. Do the learners attain the objectives of the instruction?
5. Are the time estimates for completion of the instruction accurate?
6. How do the learners feel about the instruction?
7. Are the revisions made as result of small-group evaluations effective?
8. How does the Teri feel about the instruction?
9. Do Teri and learners implement the instruction as it was designed?
10. What changes or adaptations do trainers make in the instruction?

Part 7. Formative Evaluation Report

Part 7a. Evaluation Survey or Rubric

Part 1: Please review each section of the course and provide comments and recommendations.

Section-by-Section Evaluation	
1	**Topic: Goal, audience, and rationale.**
	Comments:
2	**Analysis Report: Needs assessment, learning and transfer content and graphs, description of learners, and task analysis flow chart.**
	Comments:
3	**Planning: Learning Objectives list, Matrix of Objective, Bloom's Taxonomy, and Assessments, and ARCS Table.**
	Comments:
4	**ARCS Plan & Instructor's Guide: Attention, Relevance, Confidence, Satisfaction, Guide-Intro, Body & Conclusion.**
	Comments:
5	**Learning Materials: Material, Pro-type Website, Formative and Summative Checklist, and Technology Tool Justification.**
	Comments:

Part 2: Please rate the degree to which you agree or disagree with each statement. The scoring system is as follows: (1) Strongly disagree (2) Disagree (3) Agree (4) Strongly agree

General Evaluation	
1 2 3 4	**Readability: The instructor's guide was readable and easy to follow**
	Comments:
1 2 3 4	**Terminology: The terms were clearly defined, and did not feel lost in the jargon.**
	Comments:
1 2 3 4	**To Do Items, Handouts, and Checklist: Were provide for skill to be applied.**
	Comments:
1 2 3 4	**Practice: Students are given time to practice the skills and procedures.**
	Comments:
1 2 3 4	**Consistency: The message of the course is consistent from beginning to the end.**
	Comments:

Part 7b. Report the results of the expert review

Katie's Feedback

General Evaluation	
1 2 X 4	**Readability: The instructor's guide was readable and easy to follow**
	Comments: Overall, yes. It was very interesting to read. There are several different fonts used throughout the document. I don't know if that is part of the format, but it is a little distracting for someone who doesn't know. There are a few sentences that need reworded and several areas where the wrong tense of a word is used.
1 2 X 4	**Terminology: The terms were clearly defined, and did not feel lost in the jargon.**
	Comments: Yes. I didn't fully understand all of the requirements (Instructional design in not an area of expertise for me), but I did understand the premise of what Lindy was trying to accomplish
1 2 x 4	**To Do Items, Handouts, and Checklist: Were provide for skill to be applied.**
	Comments: Very good visuals. There are a few typos on the NextGen Reports Survey.
1 2 3 x	**Practice: Students are given time to practice the skills and procedures.**
	Comments: It appears that Lindy has developed several good practice options for students.
1 2 3 x	**Consistency: The message of the course is consistent from beginning to the end.**
	Comments: Lindy focuses on the same goal from beginning to end.

Section-by-Section Evaluation	
1	**Topic: Goal, audience, and rationale.**
	Comments: Consistent and well worded.
2	**Analysis Report: Needs assessment, learning and transfer content and graphs, description of learners, and task analysis flow chart.**
	Comments: Several different fonts in this section. Good use of graphs, visuals, etc. to describe results.
3	**Planning: Learning Objectives list, Matrix of Objective, Bloom's Taxonomy, and Assessments, and ARCS Table.**
	Comments: Each step is outlined well.
4	**ARCS Plan & Instructor's Guide: Attention, Relevance, Confidence, Satisfaction, Guide-Intro, Body & Conclusion.**
	Comments: This section really helped me understand Lindy's objectives of the course content and design of the course.
5	**Learning Materials: Material, Pro-type Website, Formative and Summative Checklist, and Technology Tool Justification.**
	Comments: Well written.

Part 7c. Comments on Change

I have done many changes that my classmates and you have suggested. My project took a great deal more time than I ever thought when I started this course. One of the suggest, Katie suggested was to fix the font. Upon finishing my final project, Word randomly change many of my sections Time Roman font and justify my headings. However, I did make the changes after she read my paper. I do have a few typos in my survey I built for on Google doc that I will need to change.

I would like to find someone who is a better expert at instruction design (ID) if I had the opportunity to review my project. However, I did know anyone that new NextGen and ID.

Part 8. AECT Standards Grid

Professional Standards Addressed (AECT)

The following standards, developed by the Association for Educational Communications and Technology (AECT), and used in the accreditation process established by the National Council for Accreditation of Teacher Education (NCATE), are addressed to some degree in this course. The numbers of the standards correspond to the numbers next to the course tasks show on the list of assignments. Not all standards are addressed explicitly through student work.

Assignments meeting standard in whole or part

Standard 1: DESIGN

1.1 Instructional Systems Design (ISD)	X	ID Project
1.1.1 Analyzing	X	ID Project
1.1.2 Designing	X	ID Project
1.1.3 Developing	X	ID Project
1.1.4 Implementing	X	ID Project
1.1.5 Evaluating	X	Selected Discussion Forums; ID Project
1.2 Message Design		
1.3 Instructional Strategies	X	ID Project
1.4 Learner Characteristics	X	ID Project

Standard 2: DEVELOPMENT

2.0 (includes 2.0.1 to 2.0.8)	X	ID Project
2.1 Print Technologies	X	Reading Quiz; ID Projects
2.2 Audiovisual Technologies		
2.3 Computer-Based Technologies	X	(all assignments)
2.4 Integrated Technologies		

Standard 3: UTILIZATION

3.0 (includes 3.0.1 & 3.0.2)		
3.1 Media Utilization	X	(all assignments)
3.2 Diffusion of Innovations		
3.3 Implementation and Institutionalization	X	ID Project
3.4 Policies and Regulations		

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Standard 4: MANAGEMENT

4.0 (includes 4.0.1 & 4.0.3)

4.1 Project Management

4.2 Resource Management

4.3 Delivery System Management

4.4 Information Management

Standard 5: EVALUATION

5.1 Problem Analysis   X

5.2 Criterion-Referenced Measurement   X   ID Project

5.3 Formative and Summative Evaluation   X   ID Project

5.4 Long-Range Planning

COURSE GOALS & OBJECTIVES

The overall goal for the course is for each student to consider and use the systematic process of instructional design to create an instructional product. To achieve this goal, students will engage in activities that promote reflective practice, emphasize realistic contexts, and employ a number of communications technologies. Following the course, students will be able to:

1. Discuss the historical development of the practice of instructional design with regard to factors that led to its development and the rationale for its use

2. Describe at least two reasons why instructional design models are useful

3. Identify at least six instructional design models and classify them according to their use

4. Compare and contrast the major elements of three theories of learning as they relate to instructional design

5. Define "instructional design."

6. Define the word "systematic" as it relates to instructional design

7. Define "learning" and synthesize its definition with the practice of instructional design

8. Relate the design of instruction to the term "educational (or "instructional") technology"

9. Describe the major components of the instructional design process and the functions of models in the design process

10. Provide a succinct summary of various learning contexts (declarative knowledge, conceptual, declarative, principle, problem-solving, cognitive, attitudinal, and psychomotor)

11. Build an instructional design product that integrates major aspects of the systematic process and make this available on the web.

    a. Describe the rationale for and processes associated with needs, learner, context, goal, and task analyses

        i. Create and conduct various aspects of a front-end analysis

        ii. Identify methods and materials for communicating subject matter that are contextually relevant

    b. Describe the rationale for and processes associated with creating design documents (objectives, motivation, etc.)

        i. Construct clear instructional goals and objectives

        ii. Develop a motivational design for a specific instructional task

        iii. Develop assessments that accurately measure performance objectives

    c. Select and implement instructional strategies for selected learning tasks

        i. Select appropriate media tools that support instructional design decisions

       d. Describe the rationale and processes associated with the formative evaluation of instructional products

          i.   Create a plan for formative evaluation

12. Identify and use technology resources to enable and empower learners with diverse backgrounds, characteristics, and abilities.

13. Apply state and national content standards to the development of instructional products

14. Meet selected professional standards developed by the Association for Educational Communications and Technology

15. Use various technological tools for instructional and professional communication

NextGen Advance Reporting

AECT STANDARDS (Applicable to EDTECH 503)

1.0 Design

1.1 Instructional Systems Design

　　1.1.a Utilize and implement design principles which specify optimal conditions for learning.

　　1.1.b Identify a variety of instructional systems design models and apply at least one model.

1.1.1 Analyzing

　　1.1.1.a Write appropriate objectives for specific content and outcome levels.

　　1.1.1.b Analyze instructional tasks, content, and context.

1.1.2 Designing

　　1.1.2.a Create a plan for a topic of a content area (e.g., a thematic unit, a text chapter, an interdisciplinary unit) to demonstrate application of the principles of macro-level design.

　　1.1.2.b Create instructional plans (micro-level design) that address the needs of all learners, including appropriate accommodations for learners with special needs.

　　1.1.2.d Incorporate contemporary instructional technology processes in the development of interactive lessons that promote student learning.

1.1.3 Developing

　　1.1.3.a Produce instructional materials which require the use of multiple media (e.g., computers, video, projection).

　　1.1.3.b Demonstrate personal skill development with at least one: computer authoring application, video tool, or electronic communication application.

1.1.4 Implementing

　　1.1.4.a Use instructional plans and materials which they have produced in contextualized instructional settings (e.g., practice, field experiences, training) that address the needs of all learners, including appropriate accommodations for learners with special needs.

1.1.5 Evaluating

　　1.1.5.a Utilize a variety of assessment measures to determine the adequacy of learning and instruction.

　　1.1.5.b Demonstrate the use of formative and summative evaluation within practice and

contextualized field experiences.

1.1.5.c Demonstrate congruency among goals/objectives, instructional strategies, and assessment measures.

1.3 Instructional Strategies

1.3.a Select instructional strategies appropriate for a variety of learner characteristics and learning situations.

1.3.b Identify at least one instructional model and demonstrate appropriate contextualized application within practice and field experiences.

1.3.c Analyze their selection of instructional strategies and/or models as influenced by the learning situation, nature of the specific content, and type of learner objective.

1.3.d Select motivational strategies appropriate for the target learners, task, and learning situation.

1.4 Learner Characteristics

1.4.a Identify a broad range of observed and hypothetical learner characteristics for their particular area(s) of preparation.

1.4.b Describe and/or document specific learner characteristics which influence the selection of instructional strategies.

1.4.c Describe and/or document specific learner characteristics which influence the implementation of instructional strategies.

2.0 Development

2.0.1 Select appropriate media to produce effective learning environments using technology resources.

2.0.2 Use appropriate analog and digital productivity tools to develop instructional and professional products.

2.0.3 Apply instructional design principles to select appropriate technological tools for the development of instructional and professional products.

2.0.4 Apply appropriate learning and psychological theories to the selection of appropriate technological tools and to the development of instructional and professional products.

2.0.5 Apply appropriate evaluation strategies and techniques for assessing effectiveness of

instructional and professional products.

2.0.6 Use the results of evaluation methods and techniques to revise and update instructional and professional products.

2.0.7 Contribute to a professional portfolio by developing and selecting a variety of productions for inclusion in the portfolio.

2.1 Print Technologies

2.1.3 Use presentation application software to produce presentations and supplementary materials for instructional and professional purposes.

2.1.4 Produce instructional and professional products using various aspects of integrated application programs.

2.3 Computer-Based Technologies

2.3.2 Design, produce, and use digital information with computer-based technologies.

3.0 Utilization

3.1 Media Utilization

3.1.1 Identify key factors in selecting and using technologies appropriate for learning situations specified in the instructional design process.

3.1.2 Use educational communications and instructional technology (SMETS) resources in a variety of learning contexts.

3.3 Implementation and Institutionalization

3.3.1 Use appropriate instructional materials and strategies in various learning contexts.

3.3.2 Identify and apply techniques for integrating SMETS innovations in various learning contexts.

3.3.3 Identify strategies to maintain use after initial adoption.

4.0 Management

(none specifically addressed in 503)

5.0 Evaluation

5.1 Problem Analysis

> 5.1.1 Identify and apply problem analysis skills in appropriate school media and educational technology (SMET) contexts (e.g., conduct needs assessments, identify and define problems, identify constraints, identify resources, define learner characteristics, define goals and objectives in instructional systems design, media development and utilization, program management, and evaluation).

5.2 Criterion-referenced Measurement

> 5.2.1 Develop and apply criterion-referenced measures in a variety of SMET contexts.

5.3 Formative and Summative Evaluation

> 5.3.1 Develop and apply formative and summative evaluation strategies in a variety of SMET

contexts.

SMET = School Media & Educational Technologies

Appendixes

Appendix A

NextGen Reports Survey

One of my projects this semester is designing a online training course. I have chosen to do it on NextGen reporting functionality. As part of my design process, I need to survey a group of people that use the product to make sure I am meeting the my objectives for my course design.

* Required

1) Do you create your own reports in NextGen? *
- ○ Yes
- ○ No

2) If you were to print labels or forms from a report you must change the _____ *
- ○ sorting tab columns to group
- ○ sorting tab columns not to group
- ○ total tab two checkboxes not to be checked
- ○ total boxes two checkboxes to be checked
- ○ Other

3) Have you every created a no show report? *
- ○ Yes
- ○ No

4) What program can you export NextGen report to? *
Check the box(es) that would be correct.
- ☐ Excel
- ☐ HTML
- ☐ ASCII
- ☐ Google Docs
- ☐ Access database

5) Have you ever create a blog on blogger? *
- ○ Yes
- ○ No

6) What is an Unapplied Amounts by Account, Invoice, and Encounter report? *
- ◉ It shows outsanding charges for a patient
- ○ A patient payment that was posted to an encounter but the encounter has no charges
- ○ Money the patient needs to pay
- ○ Money that needs to be refund to the patient

What is the difference between count and total in the total filter? *

7) You can add a pratice logo on a report. *
- ○ True
- ○ False

8) If you could not use the graph icon in NextGen to graph your report. What could you do instead? *
- ○ Export the report to Excel
- ◉ You can't do anything.

9) What type of reports to use for your job role? *
Check the box(es) relate to you.
- ☐ Scheduling
- ☐ AR
- ☐ Patient Data
- ☐ Encounter
- ☐ Charges
- ☐ Insurance
- ☐ All the Above

10) Do you know how to export a report from NextGen to the o:drive? *
- ○ Yes
- ○ No

11) What types of reports would you like to learn more about?

12) Do you know how to add a header and/or footer to your reports? *
- ○ Yes
- ○ No
- ○ Unsure

13) Have you ever downloaded a free application from the internet? *
If yes, select Other and type the name of the application.
- ○ Yes
- ○ No
- ○ Other: [_____]

14) Have you every used You-Tube to teach you how to do something? *
- ○ Yes
- ○ No

15) How would you consider your skills using the internet for research? *
- ○ Great
- ○ Ok
- ○ Poor

16) Would you take an online class for teaching yourself how to create reports in NextGen if it was self-pace? *
- ○ Yes
- ○ No
- ○ Maybe
- ○ Depends
- ○ Other: [_____]

[Submit]

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NextGen Advance Reporting

Appendix B

Total Types of NextGen Reports Used

- 100 % of Scheduling
- 30 % of AR
- 100 % of Patient Data
- 40 % of Encounter
- 30 % of Charges
- 70 % of Insurance
- 30 % of All the Above

Appendix C

Appendix D

NextGen Advance Reporting

Physician Information Technology Dept

Syllabus

Course Information

1. **Instructor**

Lindy Hagedorn, NextGen NCP
IT-Network Trainer
Phone-367-8096
Pager-855-6560
E-mail: lindyhagedorn@u.boisestate.edu

- Hello! I am very excited that you have joined me for this course. E-mail is the best way to get in contact with me and I will usually respond within 12 hours. You can reach me by phone or pager at the numbers listed above if it is an urgent issue.

- Most of the communication in this class will be done via e-mail. Communication this way have been very successful for me in the past but since this is the first time we have done training all online, I am open to a different type of communication if you find one. Always feel free to page me. Please use the pager texting methods that was taught in your New Employee training. If you have a question about this please make sure you contact me with in the first week of class.

2. **Course Description:**

- In this activity, learners use this website as an educational guide through four modules to examine, create, identify and organize patient demographic data into usable reports out of NextGen by themselves. The student will be responsible for completing each tab and the associated task on each tab. You will examine NextGen features and functionality by using Excel to record the data, add data to existing spreadsheet, manipulate data into number values, and graph. You will be become familiar with the key tools that teach you how to stay flexible about your choices, about your actions, and choices for creating different reports.

Appendix E

NextGen Login Information

ID Project: NextGen Advance Reporting

Log In To NextGen

1. Open the Novell-delivered Applications window and double-click NextGen West.
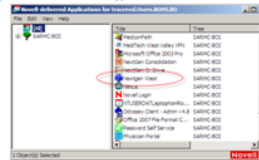
2. The **Starting NextGen** window displays. Do not close the window.

3. The **Log On to Windows** screen displays.
   a) Enter your Novell username and password.
   b) From the **Log On To** drop-down menu, select **TRINITY-HEALTH**.

ID Project: NextGen Advance Reporting

6. From the **NextGen EPM** log in window that displays:
   a) Type your NextGen username and password. Your username is case-sensitive.
   b) From the **Enterprise** drop-down menu, **Trinity Health West** will default.
   c) From the **Practice** drop-down menu, select **Saint Alphonsus Medical Group**.
   d) Click **Logon**.

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Appendix F

Appendix G

**NextGen Advance Reporting**
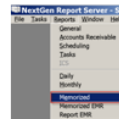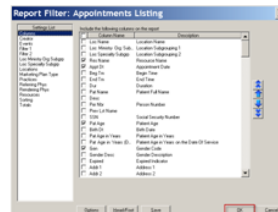
Appendix H

Formative Evaluation Assessment	
Student must have an average of 90 % of Yeses to take the NextGen Advance Reporting Online Course	
Indicate Yes or No in column B to each of the following questions.	**Yes or No**
Did the student complete new hire training?	
Does the student know how to create a screen shot?	
Does the student know how to send an attachment?	
Has the student used excel before?	
Does the student know how to save a document?	
Does the student have basic computer navigation skills?	
Does the student have Web Browser skills?	
Does the student have basic Microsoft Word skills?	
Does the student have basic NextGen scheduling, billing, and coding skills?	
Does the student have experience downloading a free application?	
Does the student have basic Excel skills?	

NextGen Advance Reporting

Appendix I

Summative Evaluation Assessment Student must have an average of 80 % of Yeses to complete the NextGen Advance Reporting Course	
Indicate Yes or No in column B to each of the following questions.	**Yes or No**
Did the student run the scheduling no show report?	
Did the student change the header and footer to meet the checklist criteria listed in the module 1 handout?	
Check the o:drive and check to see if the student was successful uploading all three reports to the o:drive.	
Did the student export all three reports to Excel successfully?	
Was the student able to send you an attachment from Word and Excel?	
Did the student complete each of the surveys?	
Was the student able to change the new patient listing report using the provided handout?	
Did the student answer the online quiz questions correctly?	
Was the student able to graph the % Daily Charges Pay Amt report?	

Did the graph look similar to this?

% Daily Charges - Pay Amt
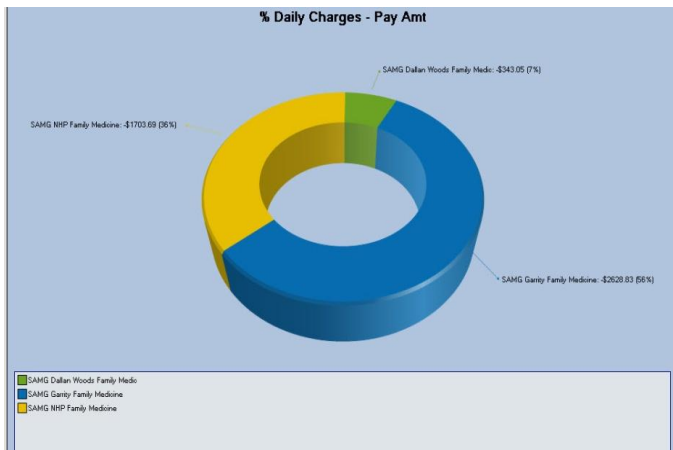
Did the student complete all of the required To Do List items in each module?	
Did the student fill out the self-evaluation form?	

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