

PRACTICE MANAGER BASIC COURSES

September 7, 2026
to May 10, 2027

Location: Zoom



 **PRACTICE
MANAGEMENT
ACADEMY**
YOUR PRACTICE MADE PERFECT

NC AHEC

SOUTHERN
REGIONAL AHEC
PART OF NC AHEC

ENDORSED BY
McMA
NORTH CAROLINA

2026 - 2027

Target Audience

Novice practice managers as well as experienced practice managers or leader providers who desire an overview of the basics of medical practice management.

Program Description

The Practice Manager Basic Courses include ten separate courses that introduce the basic concepts of practice management: financial management, insurance, the revenue cycle, coding, human resources, customer service, leadership, operations management, and quality improvement.

A new one-hour recorded lesson is released each Monday during the course. To receive a completion certificate, all quizzes must be completed by midnight on the final day of the course. The Practice Management Academy's free mobile app makes it easy for you to learn any time or any place that works for you. **COURSES MAY BE TAKEN INDIVIDUALLY OR COMPLETED IN THEIR ENTIRETY AT A DISCOUNTED RATE of \$900 compared to the total price of \$1080. To register for the entire course module, please contact Christi Boahn at 910-678-7240 or email at christi.boahn@sr-ahec.org**

Course Descriptions

Financial Management

9/7/26 – 9/27/26 | Recorded Class | 3 contact hours | **Register by 8/7 \$75** | After 8/7 \$90

To register: <https://www.southernregionalahec.org/courses-and-events/78840> Registration closes on 9/7/26

Sessions released on Mondays (9/7, 9/14, 9/21) at 8:00 a.m.; View sessions and complete quizzes by Midnight on **9/27/26**

Sound financial practices are the bedrock of a successful practice. This module introduces the basics of practice finance.

Week 1 - Expense Analysis & Budgets

1. Identify expenses that should be incorporated into budget planning.
2. Describe the steps of effective budget planning.

Week 2 - Balance Sheets & Income Statements

1. Describe the purpose and benefits of balance sheets and income statements.
2. Examine alternate formats for balance sheets and income statements.
3. Read and interpret balance sheets and income statements.

Week 3 - Accounts Payable & Receivable

1. Describe the steps of processing accounts payable and receivable.
2. Identify tips and strategies for streamlining the processing of accounts payable and receivable.

Insurance

9/28/26 – 10/18/26 | Recorded Class | 3 contact hours | **Register by 8/28 \$75** | After 8/28 \$90

To register: <https://www.southernregionalahec.org/courses-and-events/78841> Registration closes on 9/28/26

Sessions released on Mondays (9/28, 10/5, 10/12) at 8:00 a.m.; View sessions and complete quizzes by **10/18/26**

Ensuring steady payment for services rendered is vital for the success of any medical practice. In this module, participants will receive step-by-step training on managing insurance.

Week 1 - Insurance Payment Models

1. Define and differentiate between common insurance payment models.
2. Describe the financial impact of various insurance models on a practice's bottom line.

Week 2 - Contracting & Negotiations

1. Describe how the process of contract negotiation affects practice finance.
2. Define common acronyms associated with contract negotiation.
3. Articulate strategies for managing the contract negotiation process.

Week 3 - Insurance Credentialing

1. Describe the purpose and implications of credentialing.
2. Discuss methods for managing the credentialing process.

The Revenue Cycle

10/19/26 – 11/8/26 | Recorded Class | 3 contact hours | **Register by 9/19 \$75** | After 9/19 \$90

To register: <https://www.southernregionalahec.org/courses-and-events/78842> Registration closes on 10/18/26

Sessions released on Mondays (10/19, 10/26, 11/2) at 8:00 a.m.; View sessions and complete quizzes by **11/8/26**

Income is the lifeblood of your medical practice. In this module, you'll receive an overview of this important process.

Week 1 - Claims Submission

1. Describe the process of claims filing.
2. Articulate the steps of claim filing in a CMS-1500.

Week 2 - Reimbursement & Denial Management

1. Summarize the revenue cycle process.
2. Identify common denial reasons.
3. Employ specific tools to prevent or resolve denials.

Week 3 - Patient Billing & Collections

1. Articulate the steps of an efficient billing and collections process.
2. Manage customer service during the billing and collections process.

Coding

11/9/26 – 11/22/26 | Recorded Class | 2 contact hours | **Register by 10/9 \$50** | After 10/9 \$60

To register: <https://www.southernregionalahec.org/courses-and-events/78843> Registration closes on 11/9/26

Sessions released on Mondays (11/9, 11/16) at 8:00 a.m.; View sessions and complete quizzes by **11/22/26**

The care of your patients and the finances of your practice depend on accurate insurance coding. In this module, you'll learn the importance of accurate coding to medical practice.

Week 1 - Chart Auditing & Documentation

1. Explain why accurate and complete documentation is essential to patient care and billing.
2. Define common abbreviations and terminology relevant to documentation.
3. Identify and avoid common documentation errors.

Week 2 - Best Coding Practices

1. Describe tips and techniques to increase efficiency of documentation.
2. Improve the accuracy and completeness of medical coding.
3. Locate resources pertaining to medical coding.

Customer Service

11/23/26 – 12/6/26 | Recorded Class | 2 contact hours | **Register by 10/23 \$50** | After 10/23 \$60

To register: <https://www.southernregionalahec.org/courses-and-events/78845> Registration closes 11/23/26

Sessions released Monday (11/23, 11/30) at 8:00 a.m.; View sessions and complete quizzes by **12/6/26**

You can have the best providers and the best facility, but if your customers are unhappy, they will leave - often without telling you why. In this module, you'll learn tips to help you manage the customer experience your practice offers.

Week 1 - Customer Service in Medical Practices

1. Discuss principles for creating a positive customer experience.
2. Examine how procedures, workflows and processes can be streamlined to enhance customer experience.

Week 2 - Web Pages & Patient Portals

1. Describe the attributes of an effective practice web page.
2. Utilize patient portals to their best advantage.

Human Resources

1/4/27 – 2/1/27 | Recorded Class | 5 contact hours | **Register by 12/4 \$125** | After 12/4 \$150

To register: <https://www.southernregionalahec.org/courses-and-events/78844> Registration closes on 1/4/27

Sessions releases Mondays (1/4, 1/11, 1/18, 1/25, 2/1) at 8:00 a.m.; View sessions and complete quizzes by **2/7/27**

Medical practice isn't just a building: it's a team of people who serve other people. In this module, you'll learn practices that help you get the right people in the right places and create a workplace in which they can do their best work.

Week 1 - Policies, Procedures & Handbooks

1. Identify typical situations and circumstances that require policies and procedures.
2. Create appropriate policies and procedures.
3. Compile policies and procedures in an accessible handbook.

Week 2 - Interviewing & Onboarding New Employees

1. Select interview questions that best illuminate the strengths and weaknesses of prospective employees.
2. Effectively orient and welcome new employees and set them up for success.

Week 3 - Training & Teaching

1. Describe the basic principles of training/teaching adults.
2. Explain the Novice to Expert theory and how it relates to onboarding and training your team.
3. Describe at least 2 techniques to influence critical thinking skills in the workplace.

Week 4 - Job Coaching & Evaluation

1. Assist employees with the development of professional skills and behaviors.
2. Prepare evaluations that accurately measure an employees' performance and promote growth.

Week 5 - Documenting Performance

1. Define performance management.
2. Describe how continuous feedback improves performance.
3. Articulate issues and conversations that need to be documented.
4. Identify key considerations when terminating employees.

Management

2/8/27 – 3/7/27 | Recorded Class | contact hours | **Register by 1/8 \$125** | After 2/8 \$150

To register: <https://www.southernregionalahec.org/courses-and-events/78846> Registration closes 2/8/27

Sessions released Mondays (2/8, 2/15, 2/22, 3/1) at 8:00 a.m.; View sessions and complete quizzes by **3/7/27**

Week 1 - Effective Communication

1. Name three components of professionalism.
2. Use common factors that influence conflict.
3. Describe the cycle of conflict and the one question that interrupts it.

Week 2 - Managing Conflict

1. Describe the power dynamic during the five different styles of conflict resolution.
2. Discuss the components of having a critical conversation.
3. List the three factors that need to be considered when communicating with a person in crisis.

Week 3 - Retaining Effective Employees

1. Recognize the unique needs of effective employees.
2. Implement strategies to create a constructive and enjoyable work environment.

Week 4 - Mentoring Physician Leadership

1. Describe effective strategies for orienting provider-leaders to relevant practice management concepts.
2. Identify method by which provider leaders and practice managers can cooperate and collaborate to improve their practices.

Week 5 - How to Run a Meeting

1. Demonstrate the ability to develop and facilitate a structured meeting agenda that includes clear objectives, participant roles, and actionable follow-up items.
2. Explore best practices for setting clear agendas, facilitating discussions, driving decisions, and ensuring follow up.
3. Discuss when to apply formal structures like Robert's Rules of Order to support fairness and accountability.

Operations Management

3/8/27 – 4/11/27 | Recorded Class | 5 contact hours | **Register by 2/8 \$125** | Register after 2/8 \$150

To register: <https://www.southernregionalahec.org/courses-and-events/78847> Registration closes 3/8/27

Sessions released Mondays (3/8, 3/15, 3/22, 3/29, 4/5) at 8:00 a.m.; View sessions and complete quizzes by **4/11/27**

In this module, you'll learn the "nuts and bolts" principles that will strengthen your practice and protect it from the unexpected.

Week 1 - Strategic Planning

1. Discuss the elements of an effective strategic plan.
2. Explain how a strategic plan affects a practice's bottom line.

Week 2 - Medical Malpractice

1. Describe the basic principles of avoiding medical malpractice claims.
2. Differentiate between different types of malpractice policies.

Week 3 - Risk Management

1. Identify risks that affect a medical practice's legal and financial position.
2. Describe strategies for mitigating and reducing common risks.

Week 4 - Facility Design for Physician Groups

1. Evaluate the need for medical office renovation, relocation or building.
2. Plan and execute the renovation and building process.

Week 5 - Disaster Planning

1. Define the stages of disaster preparedness.
2. Identify risks and vulnerabilities that need to be considered to develop a custom plan.
3. Describe the key characteristics of effective leadership in crisis.
4. List factors that must be considered in a disaster preparedness plan.

Quality Improvement

4/12/27 – 5/9/27 | Recorded Class | 4 contact hours | **Register by 3/12 \$100** | Register after 3/12 \$120

To register: <https://www.southernregionalahec.org/courses-and-events/78848> Registration closes 4/12/27

Sessions released Mondays (4/12, 4/19, 4/26, 5/3); View sessions and complete by quizzes by **5/9/27**

Week 1 - Using Data-driven Insights to Improve Practice Management

1. Comprehend the fundamentals of data analytics.
2. Develop data analytic strategies by evaluating the different data tools and technologies practices can employ.
3. Develop key performance indicators to measure the success of your initiatives.
4. Develop effective communication strategies to share data insights with key shareholders.

Week 2 - Optimizing the Use of Technology

1. Define Quadruple Aim.
2. Describe how technology can be used to improve population health and outcomes, patient experience, and care team well-being as well as to reduce costs and improve efficiency.

Week 3 - Analyzing Workflows

1. Identify data tools and practices that can be used to evaluate the effectiveness of workflows.
2. Perform a structured workflow analysis with the goal of improving efficiency and customer satisfaction.

Week 4 - Participating in Value-Based Programs

1. Define value-based healthcare and its implications for a medical practice's bottom line.
2. Name tools, strategies and resources that support value-based healthcare.

Leadership

5/10/27 – 6/6/27 | Recorded Class | 4 contact hours | **Register by 4/10 \$100** | After 4/10 \$120

To register: <https://www.southernregionalahec.org/courses-and-events/78850> Registration closes 5/10/27

Sessions released Mondays (5/10, 5/17, 5/24, 5/31); View sessions and complete quizzes by **6/6/27**

Practice managers are leaders, and the better leaders they are, the more successful their practices will be. In this module, you will learn communication and management skills that will help you make your practice cohesive, efficient, and welcoming for both your staff and patients.

Week 1 - Braveheart Leadership: Characteristics of Inspirational Leaders

1. Discuss the characteristics of inspirational leaders.
2. Identify personal strengths and challenges as a leader and opportunities growth.

Week 2 - Becoming an Authentic Leader

1. Express the impact gender has on leadership styles.
2. Recognize the impact of implicit bias.
3. Apply characteristics of authentic leadership to one's own leadership style.

Week 3 - Understanding & Building Your Team

1. Articulate the difference between intelligence quotient (IQ) and emotional quotient (EQ).
2. Describe how emotional intelligence affects a leader's impact.
3. Recognize the aspects of emotional intelligence in others.

Week 4 - Vampires in the Workplace: Toxic Staff

1. Describe the characteristics of a toxic staff member.
2. Articulate the impact of toxic staff on the leader, team, and organization.

Instructors

GeGe Beall (MS, FACHE, SPHR, SHRM-SCP) has a master's degree in industrial/organizational psychology. She has worked in Human Resources and Organizational Development for her entire professional career.

Jennifer Bigger (RN, MSN) is Vice President of Quality Improvement and Health Informatics at SRAHEC.

Christina Blackburn (B.S., AAPC, CPC, CRC) is a medical coder for the Veteran Administration. Her coding experience has included family medicine, endocrinology, behavioral health, specialties, inpatient, and emergency coding. She is a member of the American Academy of Professional Coders.

Donna Bowen (BBA, MBA, CMOM) is the Administrator of SRAHEC's Practice Support team. Prior to joining SRAHEC, she served as a practice manager for several medical practices.

Leah Cook (BA, CMPE) is the co-founder and co-president of Uptick Health, a boutique revenue cycle management firm for small-to-medium independent healthcare practices.

Becky Dixon is a practice support consultant for Area L AHEC in Rocky Mount, NC. She has over twenty years of experience in medical practice management. She is passionate about helping practice managers be successful.

Mark Holmstrom (BA, MHA) is a QI Consultant and Practice Support Coach at MAHEC in Asheville and is a member of the NC AHEC Practice Support Team.

Matt Johnson (BA, MA, MBA) is an experienced practice administrator. He is a past president of the North Carolina Medical Group Management Association and a current member of its board.

Jane Moran (BA, MLS) is Project Specialist for the NCAHEC Practice Management Academy. She has extensive experience in customer service, research and education in multiple settings.

Melissa Overton (BSN, RN, CEO) is an award-winning, regionally recognized, and internationally certified educator, mentor, speaker, entrepreneur, and philanthropist. She has more than 20 years of experience as a critical care nurse and educator. She is CEO of a MedicalTraining.me.

Akpene Torku Sims (BA, SHRM) is an HR and Leadership Development Professional and Consultant with more than fifteen years combined experience with demonstrated success in talent development, strategic planning, training creation and technologies, as well as, labor and employment law compliance.

Chris Weathington (BSPH, MHA) serves as Director of Practice Support at NC AHEC with previous leadership roles at UNC Health, NC Office of Rural Health and ECU Health. In Chris' current role, he leads a team of practice support coaches and staff to support practices with value-based care and practice management.

Agenda

Individual course sessions open at 8:00 a.m. on Mondays during the course.

Fee

Early registration \$25 per hour. Regular registration \$30 per hour.

Invoicing is available for **groups only** and must be processed no later than one week before the beginning of the module. All individuals in a group must create an individual MyAHEC account prior to registration. Contact Christi Boahn (910) 678-7240 for more information.

Credit

CEUs: .1 per contact hour

Participants must complete **100%** of sessions by the end of the module AND complete a course evaluation to receive credit.

Substitutes/Refunds/Transfers

- Cancellations must be in writing (fax, email, or mail)
- Registrants cancelling between two weeks and two full business days prior to the first day of the event are refunded at 70% of the registration fee subject to a minimum \$25 cancellation fee.
- No refunds or credits will be given for cancellations received less than two full business days prior to the event.
- Cancellations greater than 2 weeks prior to the event will receive 100% refund.
- No vouchers will be issued in lieu of a refund.
- Transfers/substitute(s) welcome (notify in advance of the program)

Attendance at this activity grants permission for Southern Regional AHEC to use any photographs, audio, video, or other images from this activity for promotional or educational purposes. Please notify an AHEC staff member if you have concerns.

ADA Service

Americans with Disabilities Act Individuals requesting accommodation under the Americans with Disabilities Act (ADA) should contact the ADA coordinator at least five days prior to the event at (910) 678-7112 or Althea.Bell@sr-ahec.org.

Contact

Jane Moran, MLS, Project Manager / (910) 678-0113 / Jane.Moran@sr-ahec.org

SOUTHERN REGIONAL AHEC

PART OF NC AHEC

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