



## 6.2021.1 Upgrade | Important Considerations for Upgrade

### Step 1: Create a Testing Team

- Include staff from all departments/roles
  - Please notify TSI if any additional staff members need to be given access to the testing environment
- Create a Workflow Outline document highlighting all roles in the practice and create a high-level workflow overview of each role (see page 3 for example of how to analyze workflows)
  - Start by identifying all departments/staff roles, then determine all responsibilities for each department/role and what workflows are currently used when documenting in NextGen
    - Include all workflows, including (but not limited to): office visits, procedure only visits, telephone call communications, prior authorization, etc.
    - Highlight any areas and workflows that might be impacted by upgrade to ensure staff provide extra focus on these changes
  - Ensure your testing team encompasses each of the listed workflows so that all workflows are addressed in the testing process
    - Every workflow needs to be tested unless otherwise stated in the Testing Checklist
    - Utilize the provided Gap Analysis document to identify commonly used workflows to ensure different EHR workflows are addressed

### Step 2: Test the 6.2021.1 Update in NGTest

- Ensure all new/updated features and content released in the 6.2021.1 Upgrade and covered within the EHR/Specialty Overview document and training videos are tested thoroughly (in addition to existing functionality)
- Test real encounters on real patients
  - Coordinate with PM testing with EHR testing to mirror workflows that will be experienced after production upgrade
    - For example, PM to provide list of patients that were scheduled/checked-in to EHR team, EHR team to use these patients to test EHR office visit workflows
  - Replicate documentation of encounters completed in production
    - Allows users to compare workflows used in production, identify areas that may have been previously customized in EHR, and compare generated EHR documents for accuracy/formatting
    - Compare all new templates and documents against any known customized templates and documents in production
      - Utilize the provided Gap Analysis document to identify commonly used custom templates and documents



- Test various types of encounters, procedures, telephone/patient/internal communication workflows
- If possible, compare production and test environments together in real time
  - Use two workstations side by side, one logged into NGProd and one logged into NGTest
- Test all templates AND documents in EHR - this includes picklists, template defaults, My Phrases, letters, Chart Note, charge passthrough (if applicable), items selected on setup form, etc.
- The more “eyes” on the test environment, the better
  - Increases likelihood that any issues or requests will be addressed during testing process, rather than after production go-live
- NOTE: Your testing environment may respond slower than your production environment. This is not unusual as your testing database resides on a different server, which allows NGProd to operate more efficiently

### Step 3: Submit Customization Spreadsheet

- Submit Customization Request Form if any customizations are desired and development team will create scope of work for approval
  - NOTE: Any requests for customization are billable and will impact your production go-live timing. Prioritizing customizations based on if needed prior to go-live can help expedite the development process

### Step 4: Submit Testing Checklist

- Combine all notes regarding errors, requests, and/or questions encountered from the Testing Team and compile into one testing checklist and submit to TSI for review
  - Submitting one checklist will ensure that we are able to efficiently and effectively address any items that require attention in your testing environment
  - Attach additional pages with details of any issues encountered, screenshots, and configuration changes as needed, as well as any questions to be addressed during the testing follow up call
    - NOTE: Do not include any PHI in screenshot for HIPAA security – either crop out of screenshot or redact

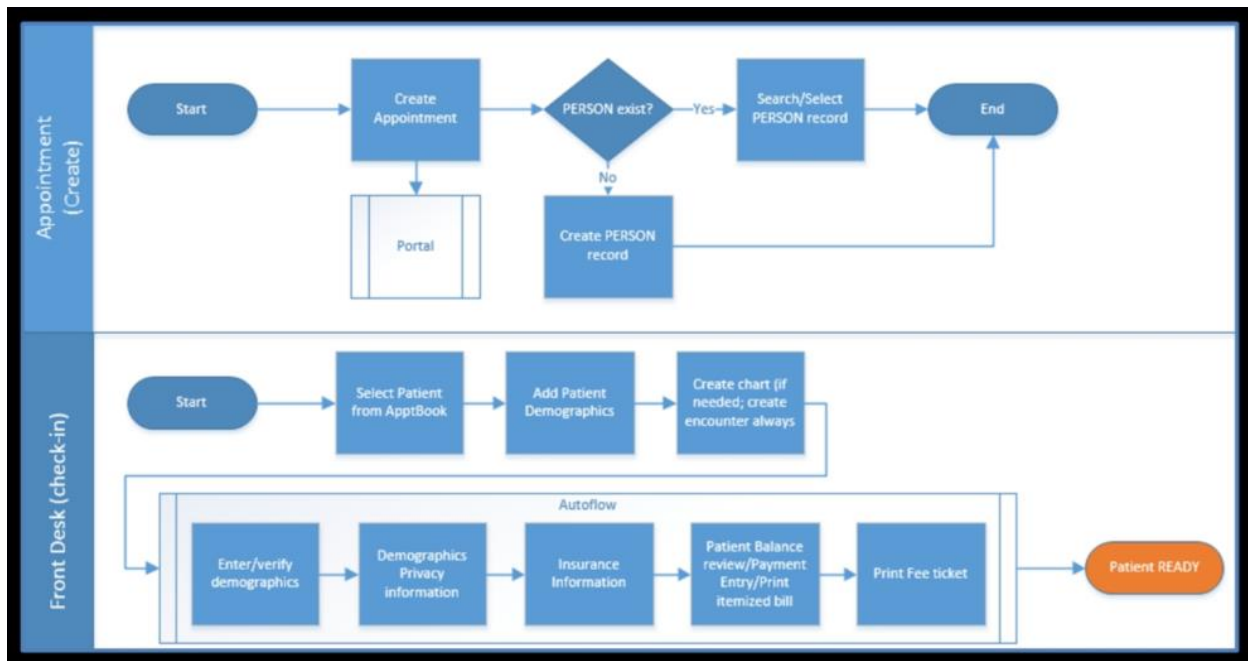
### Step 5: Develop an Internal Training Plan

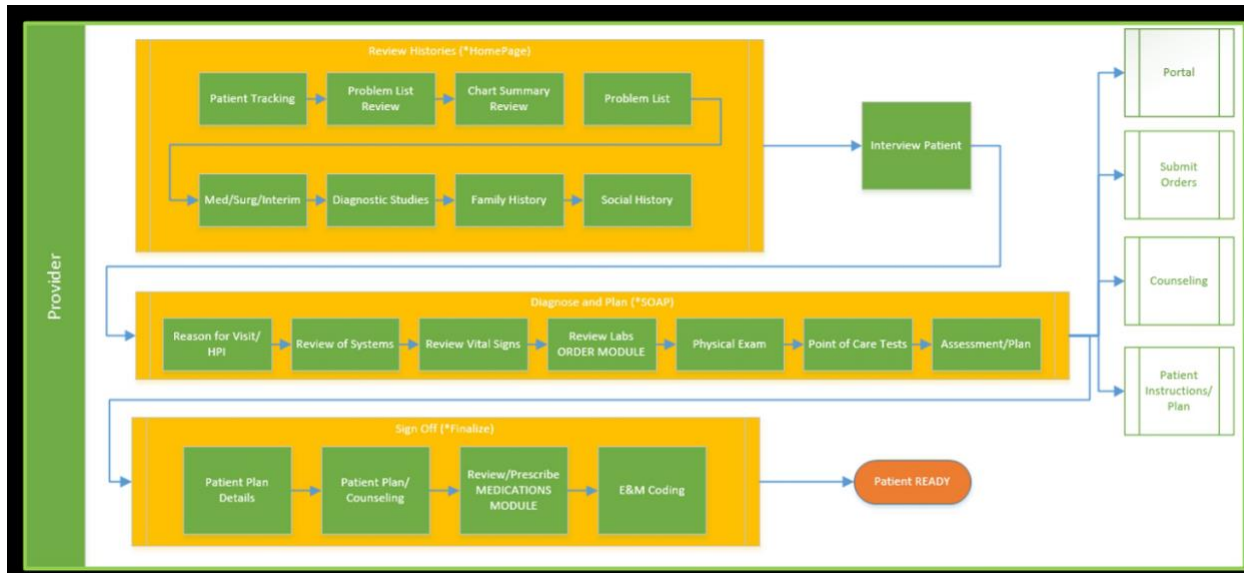
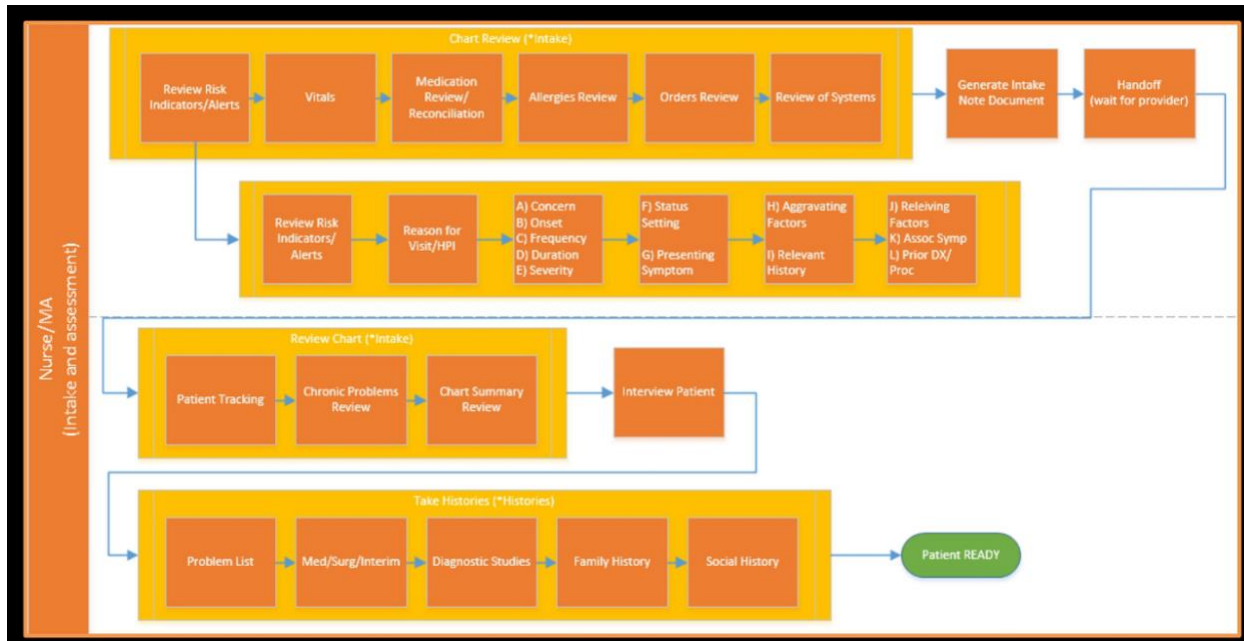
- Recommend using TSI Overview Document and Training Videos
  - Use Workflow Outline document created in Step 1 to determine relevant cheat sheet or videos to assign to each department
- Track staff compliance
  - Provide staff with a deadline and follow up to ensure trainings have been completed



- Use the Testing Team as the internal point person to provide supplemental training (if needed), address/relay questions, etc.
- If you would like to open up the test environment to other staff for practice (after testing checklist has been approved), please provide TSI with a list of users so that access to the testing environment can be granted

### 6.2021.1 Upgrade | Workflow Overview Example – Office Visit





# NextGen 6.2021.1 PM Enhancements Overview



DISCOVER

