Cases Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

v.11
Updated 10.20.22

Recommended prerequisite reading: Success Community Getting Started Guide

Tips on Managing Cases

Simulation Videos for Managing Cases

See how to manage cases by watching our quick training simulation videos. Know how to submit, edit, accept a resolution, and close cases. Click on the links below to watch:

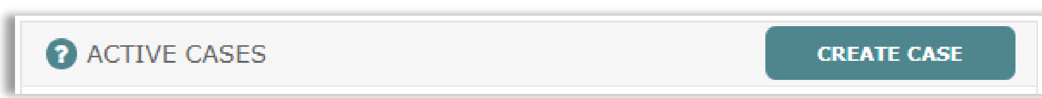
- Creating a Case
- Creating a Case for a Child Account
- Viewing and Updating Case Information
- Accepting a Case Resolution
- Closing a Case

Creating Cases

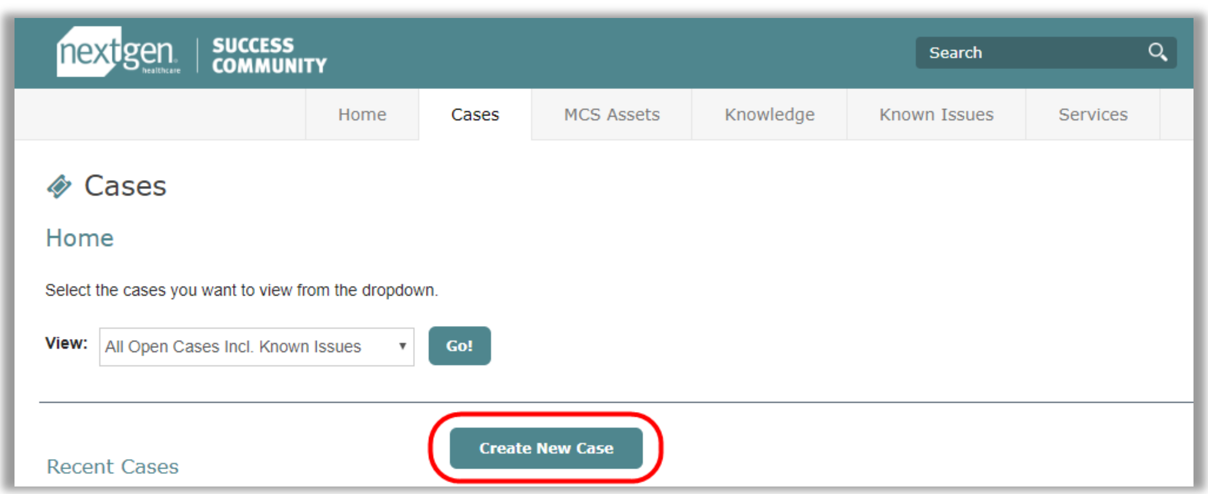
Success Community users with either a Main Client Community User or Client Community User profile can create cases in the Success Community. Cases created for your organization are viewable by other community members from your organization with either the Main Client Community User, Client Community User, or Read-Only Community User profiles.

There are two places on the Success Community to begin creating a case.

1. From the *Active Cases widget* on the home page. On the home page select **CREATE CASE**.

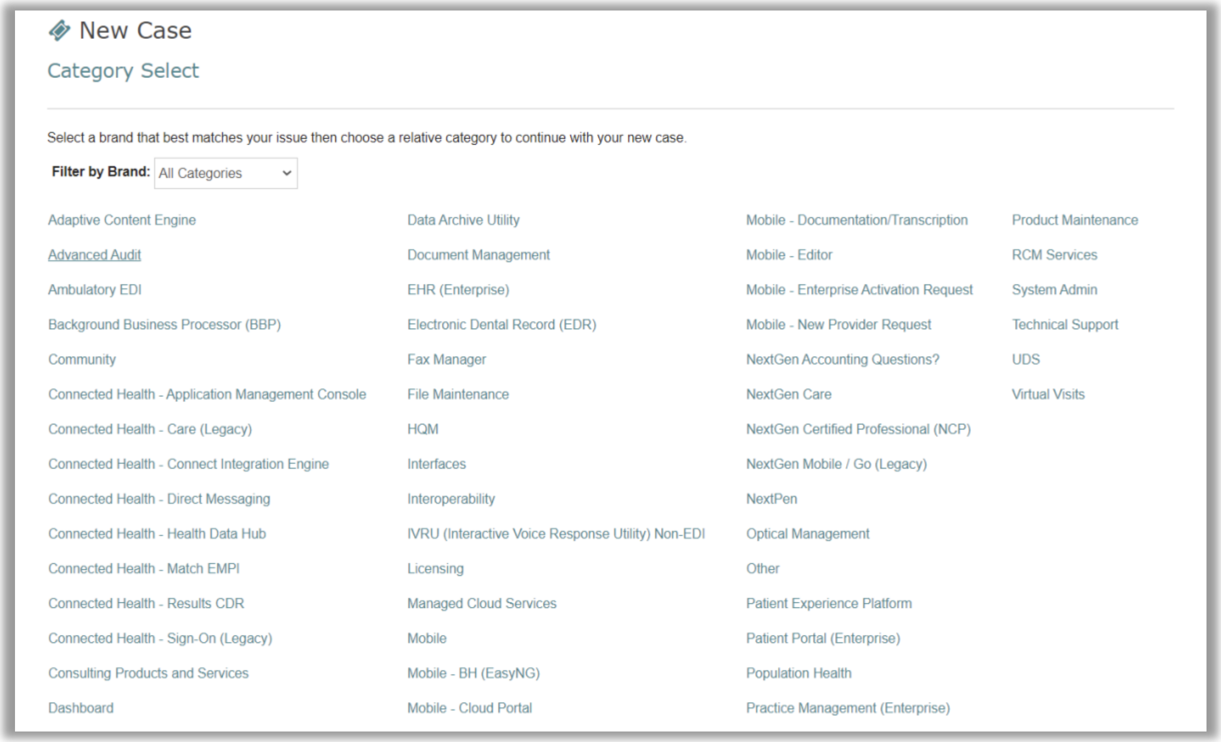


2. Click on the *Cases* tab and then click on ***Create New Case***.



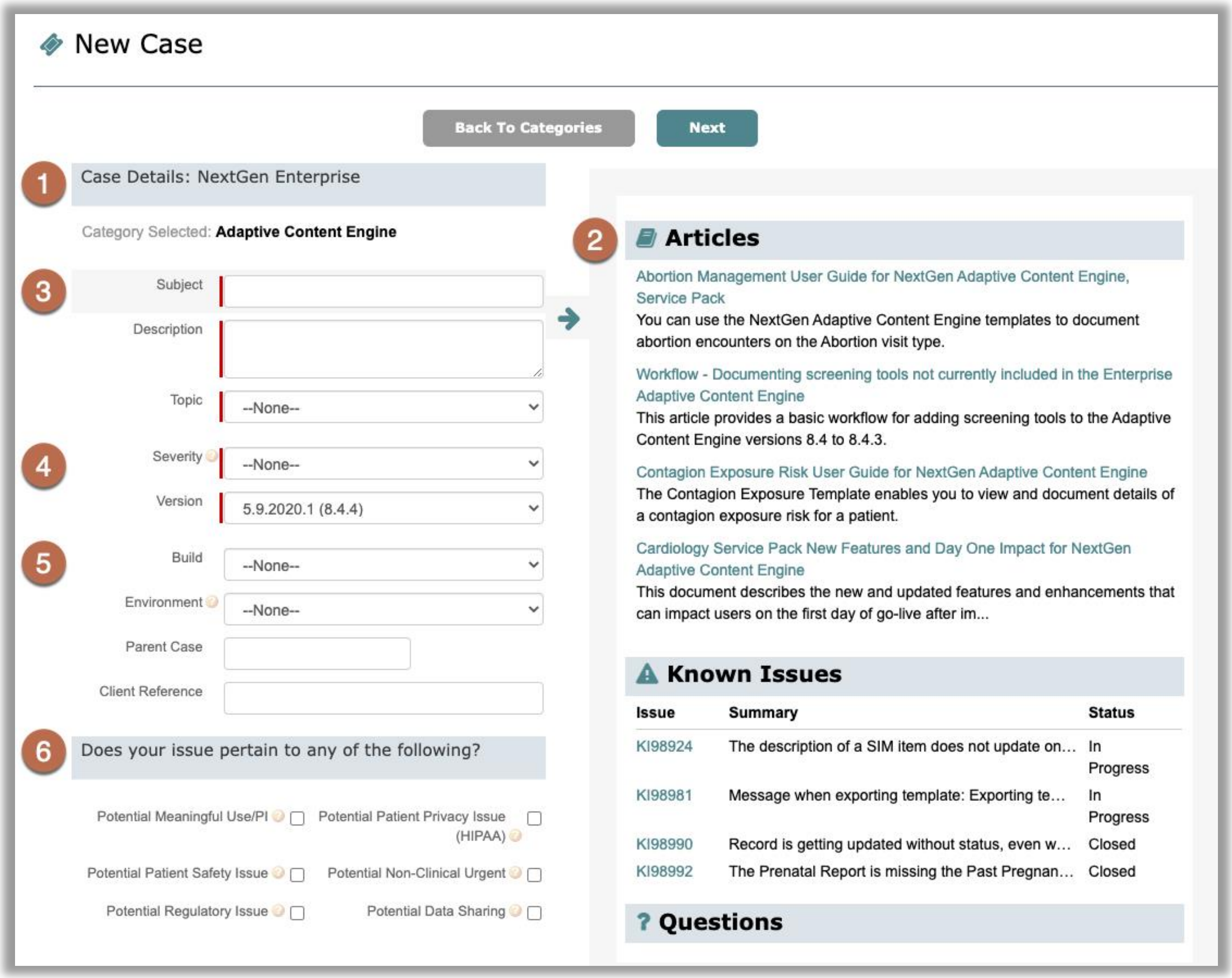
Either option will take you to the *Category Select* screen.

Category Select Screen



Select the product your case is in reference to. To filter by product family, choose ***Filter by Brand***. You can also hover over a product name for a brief description.

New Case Form



1. Category
The product your case is in reference to.

2. Case Assistance Panel
Updates with articles, known issues, and chatter questions most relevant to the product and subject, to help address your questions before submitting a case.

3. Subject, Description and Topic *(required)*
Subject is your question, query, or case concern. *Topic* is a pre-defined picklist where you can select the product/functionality closest related to your case. In *Description*, you can provide a more detailed explanation of your case.

4. Severity and Version
Use the *Version* picklist to choose your product version. Select *N/A* if unsure or not applicable.

Severity Levels (required)

Severity informs NextGen Healthcare of how critical your case is to your organization.

- Critical (Priority 1) – Serious interruptions to a production system
- Urgent (Priority 2) – Serious interruptions to normal operations or impact on deadlines
- Important (Priority 3) – Interruption but no impact on production operation
- Minor (Priority 4) – Problem results in minimal or no interruptions to normal operations

5. Build, Environment, Parent Case, Child Account, and Client Ref #

Select which product *Build* you are currently using and the *Environment* your case pertains to. If your case is related to another case, include that case number in the *Parent Case* field.

Child Account (required)

If you're a reseller, or an account that manages child accounts, you will also have a field called *Child Account* where you can select which child account this case is related to.

Client Ref #

If your organization uses a ticketing system in addition to Success Community cases, this field allows you to reference the ticket number from your internal support system to a case.

6. Potential Critical Issue Check boxes

If your case involves a potential critical issue, select any of the check boxes that are relevant. You will be prompted to provide more detail in the next screen. This is applicable to select products.

If you did not select any of the potential critical issue check boxes on the case creation page, your case will be created. Otherwise, you will proceed to the *Potential Critical Issues* screen.

Potential Critical Issues Screen

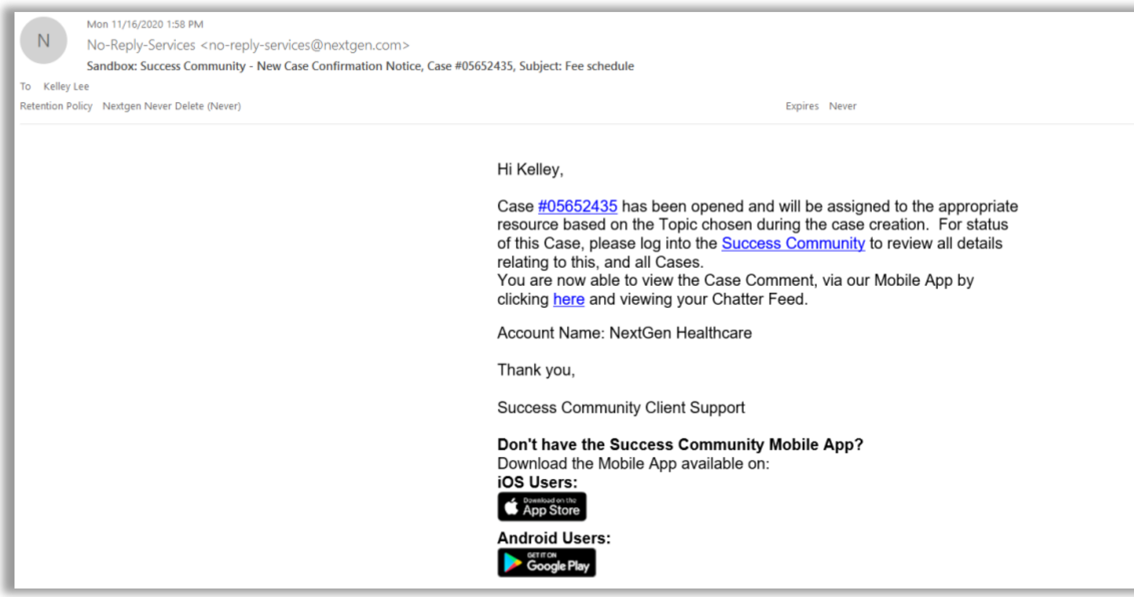
Whichever box(es) you checked will open to a series of required fields and questions to answer. You must complete each field with a red line as these are required. Once completed, select *Save* and your case will be created.

If you determine that your case is not a critical issue after clicking the *Next* button, you will need to click off the screen and recreate the case since it's no longer a potential critical issue case.

Case Creation Email

Once your case has been created, you will receive a case confirmation email form support-noreply@nextgen.com.

If you do not receive your email, it may have reached your spam, clutter, or junk folders. Please allowlist @nextgen.com to ensure that you receive these emails. Also confirm the email address listed in your profile is correct.



Mon 11/16/2020 1:58 PM
No-Reply-Services <no-reply-services@nextgen.com>
Sandbox: Success Community - New Case Confirmation Notice, Case #05652435, Subject: Fee schedule
To Kelley Lee
Retention Policy Nextgen Never Delete (Never) Expires Never

Hi Kelley,

Case #05652435 has been opened and will be assigned to the appropriate resource based on the Topic chosen during the case creation. For status of this Case, please log into the Success Community to review all details relating to this, and all Cases.
You are now able to view the Case Comment, via our Mobile App by clicking here and viewing your Chatter Feed.

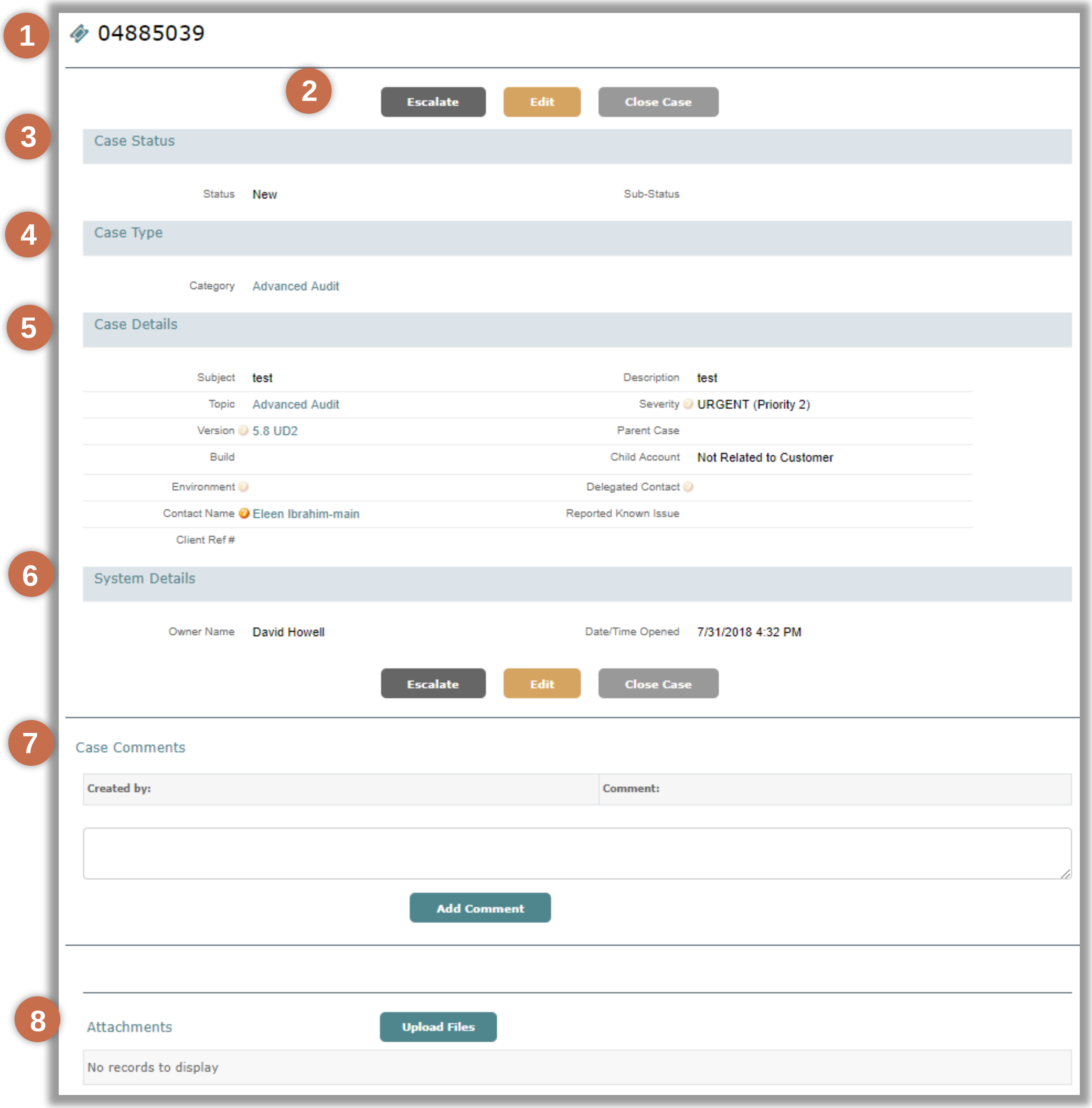
Account Name: NextGen Healthcare

Thank you,

Success Community Client Support

Don't have the Success Community Mobile App?
Download the Mobile App available on:
iOS Users:
App Store
Android Users:
Google Play

Anatomy of a Case



1. **Case Number –** The automatically assigned case number. This is searchable via global search.

2. **Case Actions –** Escalate, edit, or close your case here. When editing a case, you can only edit the *Parent Case* and *Delegated Contact* fields. Any other changes can be requested through case comments.

3. **Case Status –** Review case status/sub-status to determine actions to resolve the case.

4. **Case Type –** The product your case is in reference to.

5. **Case Details –** These are the key details of your case that you entered when you created the case. If the case was deemed a known issue, that known issue number will be listed in the *Reported Known Issue* field. *Note: Subject, Description, and Reported Known Issue are all searchable in global search.*

   Delegated Contact

   In addition to the case owner, a delegated contact can view a case in the *My Cases* list view and edit a case from the Success Community. The case owner and the delegated contact will both receive communications on the case. *Note: this person must be a member of the Success Community, tied to your account, with permissions to manage cases.*

6. **System Details –** This is where you can see the owner name, the name of the NextGen Healthcare representative actively working your case, and the date and time the case was opened.

7. **Case Comments –** Add a comment to ask questions or provide updates to your NextGen Healthcare representative. Comments from NextGen Healthcare will also appear here. This provides a conversation history for your case.

8. **Attachments –** You can add attachments to your case to provide additional information to NextGen Healthcare. *Note: Attach PDF, Excel®, Word®, jpeg, gif, or png files. The size limit is 25MB for each attachment.*

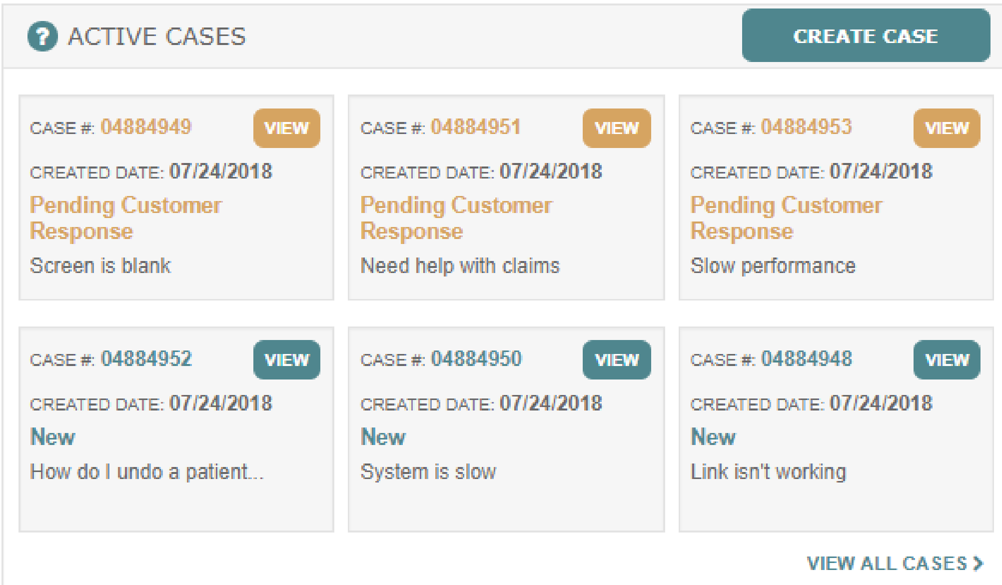
Home Page Active Cases Widget

We recommend you first manage your cases via the *Active Cases* widget on the home page.

The six most recent cases, based on last modified date, will display in the following order:

1. Resolved Cases Pending Customer Approval
2. Pending Customer Response
3. New
4. In Progress
5. Pending Analyst Response

Cases pending, awaiting action from you, will display in orange. Cases in blue are those that Client Support is actively working.



Cases Tab - List Views

Cases will display in multiple list views, depending on the status and contact fields. When you first open the *Cases* tab, you will see *Recently Viewed Cases*.

Recently Viewed Cases is not a sortable case list view. This table shows you any case that you recently opened regardless of type or status. If you're searching for a particular case, we recommend selecting a list view.

To ensure consistent collaboration between you and Client Support, we recommend reviewing the ***My Cases that Need Review*** list view daily. As cases are worked and updated, this list will change, so checking frequently is suggested. Once you have worked all your cases that need review, feel free to move to other list views that interest you.

List View Descriptions

Select a list view and click *Go*.

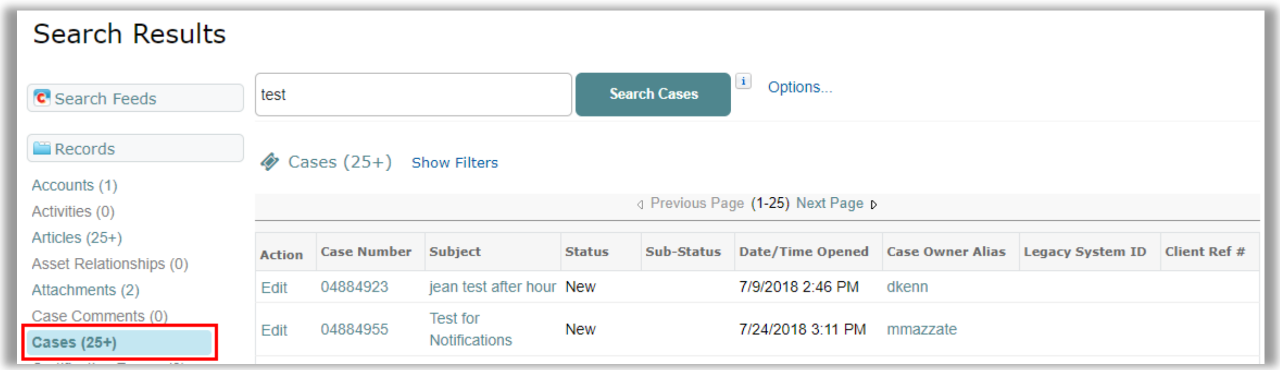
List View
All Cases All cases for your organization. Includes both open and closed cases in any status.
All Closed Cases All closed cases for your organization. Includes both support and critical issues cases.
All Closed RCM Cases* All closed RCM cases submitted by NextGen Healthcare on behalf of your organization.
All My Closed Cases All closed cases, originally opened by you. Includes both support and critical issues cases.
All Open Cases Incl. Known Issues All open cases for your organization with a status of new, in progress, pending analyst response, pending customer responses, or resolution proposed. Includes both support and critical issues cases.
All Open Cases without Known Issues All open cases for your organization, excluding known issues, with a status of new, in progress, pending analyst response, pending customer responses, or resolution proposed. Includes both support and critical issues cases.
All Open Critical Issue Cases All open critical issue cases for your organization with a status of new, in progress, pending analyst response, pending customer responses, or resolution proposed.
All Open RCM Cases* All open RCM cases submitted by NextGen Healthcare on behalf of your organization.
Closed Cases Linked to a Known Issue Closed cases for your organization that are attached to a known issue that is closed or with a scheduled release. Includes both support and critical issues cases.
My Account's API Cases All open API cases for your organization.
My Account's Cases that Need Review Open cases for your organization with a status of pending customer responses or resolution proposed. Includes both support and critical issues cases.
My Cases that Need Review Open cases, opened by you, with a status of pending customer responses or resolution proposed. Includes both support and critical issues cases.
My Open Cases Open cases, opened by you, with a status of new, in progress, pending analyst response, pending customer response or resolution proposed. Includes both support and critical issues cases.
My Open Cases - Delegated Contact Open cases where you are listed as the delegated contact, with a status of new, in progress, pending analyst response, pending customer response or resolution proposed. Includes both support and critical issues cases.
Open Cases Linked to Known Issue Open cases for your organization that are attached to a known issue that is open. Includes both support and critical issues cases.
Recently Viewed Cases Cases that you have recently viewed.

These cases are submitted by NextGen Healthcare on behalf of your organization and cannot be created or edited. They are view only for informational purposes.

Search for Cases Using Global Search

You can search for any cases using the global search bar at the top of the Success Community. Type in your search terms and press enter. The system will search the subject, topic, case number, case comments, and description.

If there are any results that include your search terms, they will appear on the *Search Results* page. To only see search results that are cases or case comments, select those record types from the left menu.



Learn more about using global search by watching the Using the Global Search simulation video.

Case Statuses and Descriptions

STATUS	SUB-STATUS	ACTION
New The default status for all new cases	N/A	No action required.
In Progress Your case is being activity worked by a NextGen Healthcare Support team member.	No sub-status or: • Appt. Scheduled • Change Rejected • Change Accepted	No action required.
Pending Customer Response The NextGen Healthcare Support team has asked for additional information from you and is awaiting your response.	No sub-status or change proposed	Add a case comment or attachment. The case will move to pending analyst response.
Resolved NextGen Healthcare has provided information to you that we believe answers your question or addresses your issue. Or you have resolved the issue yourself.	• Client Resolved Duplicate • Inside Sales • No Response • Resolution Proposed	Accept or reject the resolution. Accept and the case will close. Reject and the case will move to pending analyst response and prompt you for a reason for the rejection.
Pending Analyst Response The NextGen Healthcare Support team is reviewing your case comments, resolution rejection or escalation, and will provide an update.	No sub-status or: • Change Rejected • Escalated	No action required.
Linked to Known Issue We have attached the case to an open known issue that we believe will resolve your case once a fix is released.	• Known Issue Proposed • Known Issue Accepted	Accept or reject the known issue. Accept and the case will move to known issue accepted. Reject and the case will move to pending analyst response and prompt you for a reason for the rejection.

Escalating Cases

If the level of urgency on one of your open cases has escalated, please feel free to utilize the *Escalate* option on your case.

To deliver the highest quality support to our entire client base, we ask that you limit using the *Escalate* option to critical issues that have an impact on revenue or patient safety business.

If you are not satisfied with the support you are receiving on a case or need a status on a case, please add a comment to your case and your case owner will be alerted that you are waiting on them for an update.

Closing Cases

NextGen Healthcare analysts will no longer close cases. There are three ways that a case can be closed:

1. **Resolution was accepted –** You accepted the proposed resolution.
2. **Manual close –** You clicked the button Close Case on the case details page.
3. **Auto-close –** The case was in a resolved status for 14 days and it auto-closed.

Important Note!
Once a case has been closed it cannot be reopened. Click the *Replicate Case* button or create a new case and add the old case number to the *Parent Case* field.

Getting Started - Frequently Asked Questions

Can we open cases over the phone?

You can still open a case by a phone call.

How do I print a list of all open cases for my organization?

On the cases tab, select the desired view and click *Go*. After clicking *Go*, a small printer icon will appear in the top-right corner of the screen. Clicking the printer icon will display a list of all the results from your view with the option to print in the top-right corner of the screen.

If a case is determined to be an Idea, do we need to create a separate Idea or can a case be turned into an Idea?

NextGen Healthcare will not be able to create an Idea on behalf of a client. For the Idea creator to be notified of status changes, clients must submit their own ideas. Clients can submit an Idea directly from a closed case.

Since each client can now escalate a case, are there any limitations on how many escalated tickets are entered per day per client?

Currently there is no restriction on how many cases can be escalated.

Can Resellers prevent clients from opening cases?

It is up to the Reseller to manage who is a user under their record. Only clients set up as a Main Client Community User or Client Community User will be able to create or maintain cases.

I do not see all the practices available in the *Child Account* drop-down list when creating a case. How do I correct this?

If you do not see all your practices listed in the *Child Account* field, please open a new case with the Product Category *Community* and NextGen Healthcare will assist you.