



Cases Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

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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:

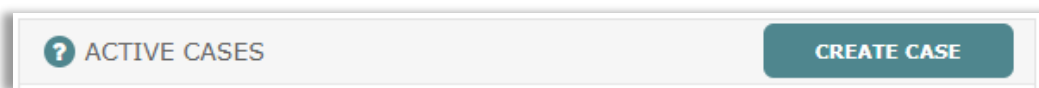
- [Creating a Case](#)
- [Creating a Case for a Child Account](#)
- [Viewing and Updating Case Information](#)
- [Accepting a Case Resolution](#)
- [Closing a Case](#)

Creating Cases

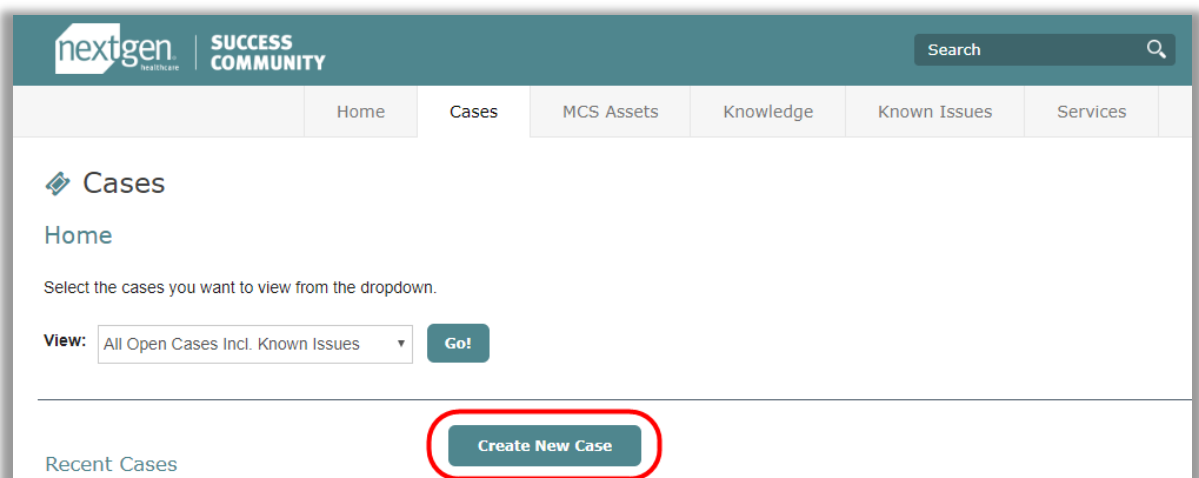
Success Community users with either a Main Client Community User or Client Community User profile can create cases in the Success Community. Cases created for your organization are viewable by other community members from your organization with either the Main Client Community User, Client Community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

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

1. 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 Case Category select screen.



Case Category Screen

New Case

Category Select

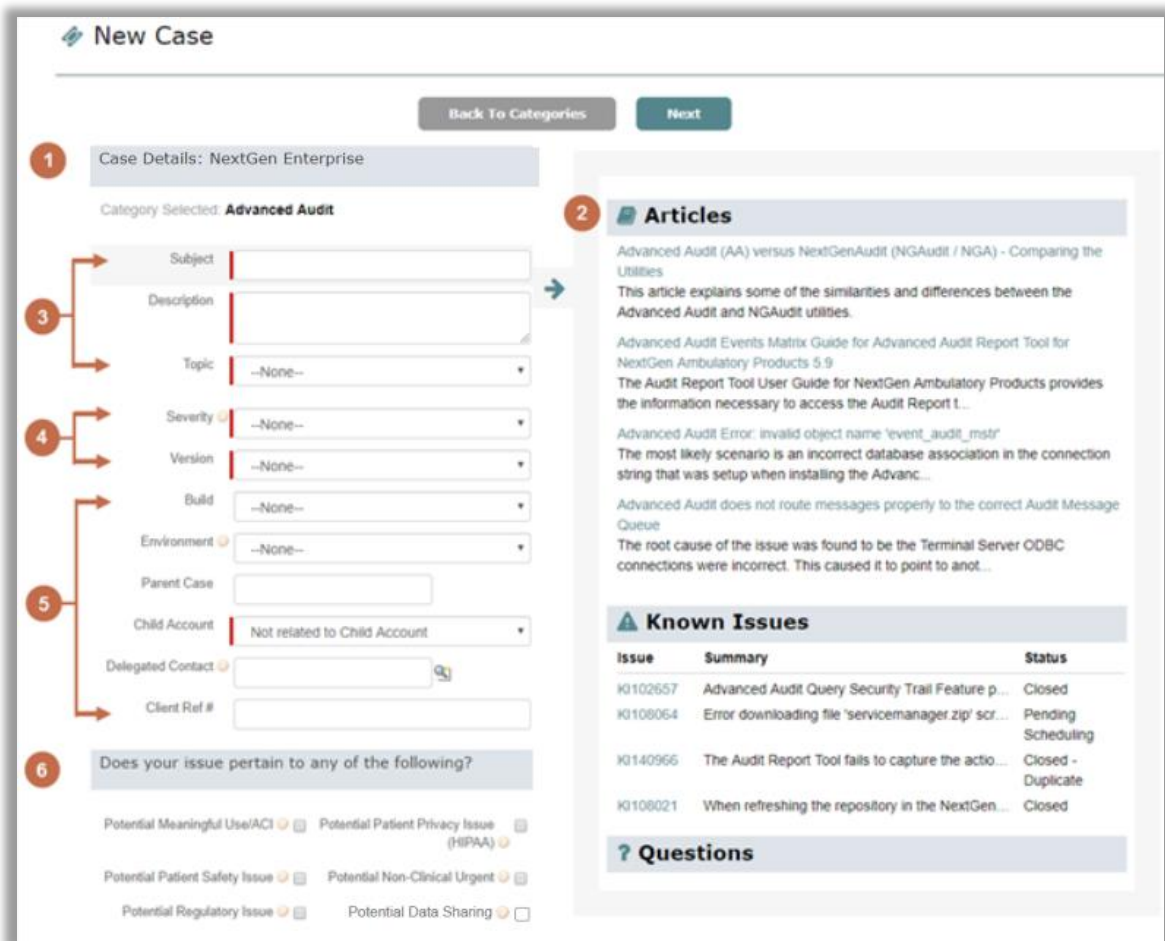
Select a brand that best matches your issue then choose a relative category to continue with your new case.

Filter by Brand:

Adaptive Content Engine	Data Archive Utility	Mobile - Documentation/Transcription	Product Maintenance
Advanced Audit	Document Management	Mobile - Editor	RCM Services
Ambulatory EDI	EHR (Enterprise)	Mobile - Enterprise Activation Request	System Admin
Background Business Processor (BBP)	Electronic Dental Record (EDR)	Mobile - New Provider Request	Technical Support
Community	Fax Manager	NextGen Accounting Questions?	UDS
Connected Health - Application Management Console	File Maintenance	NextGen Care	Virtual Visits
Connected Health - Care (Legacy)	HQM	NextGen Certified Professional (NCP)	
Connected Health - Connect Integration Engine	Interfaces	NextGen Mobile / Go (Legacy)	
Connected Health - Direct Messaging	Interoperability	NextPen	
Connected Health - Health Data Hub	IVRU (Interactive Voice Response Utility) Non-EDI	Optical Management	
Connected Health - Match EMPI	Licensing	Other	
Connected Health - Results CDR	Managed Cloud Services	Patient Experience Platform	
Connected Health - Sign-On (Legacy)	Mobile	Patient Portal (Enterprise)	
Consulting Products and Services	Mobile - BH (EasyNG)	Population Health	
Dashboard	Mobile - Cloud Portal	Practice Management (Enterprise)	

Select a case category that best fits your needs. Categories are organized by brand or general. Choose **Filter by Brand**. You can also hover over a category for a brief description.

Case Creation Form



1. Category

The category you have chosen.

2. Case Assistance Panel

Updates with articles, known issues, and chatter questions most relevant to your category 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 predefined 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, Delegated Contact and Client Ref #

- Select which product *Build* you are currently using.
- If your case is related to another case, include that case number in the *Parent Case* field.
- Add a secondary point of contact (with access to cases) on your case as a *Delegated Contact*.

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.

Delegated Contact

In addition to the case owner, a delegated contact can view a case under "My Cases" 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 access to cases.*

Client Ref #

If your organization uses a support 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 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 categories.

If you did not select any of the potential critical issue check boxes on the case creation page, your case will be created and you can skip to the next session. Otherwise, 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.

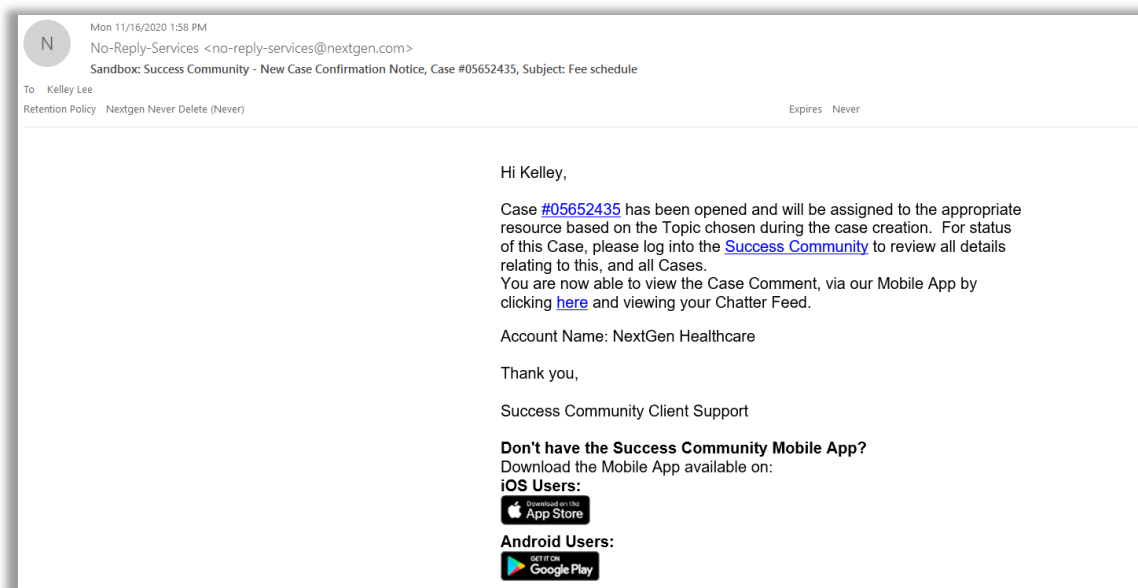


If you determine that your case is not a critical issue after clicking the Next button, you will need to click off the screen and recreate the case since it's no longer a potential critical issue case.

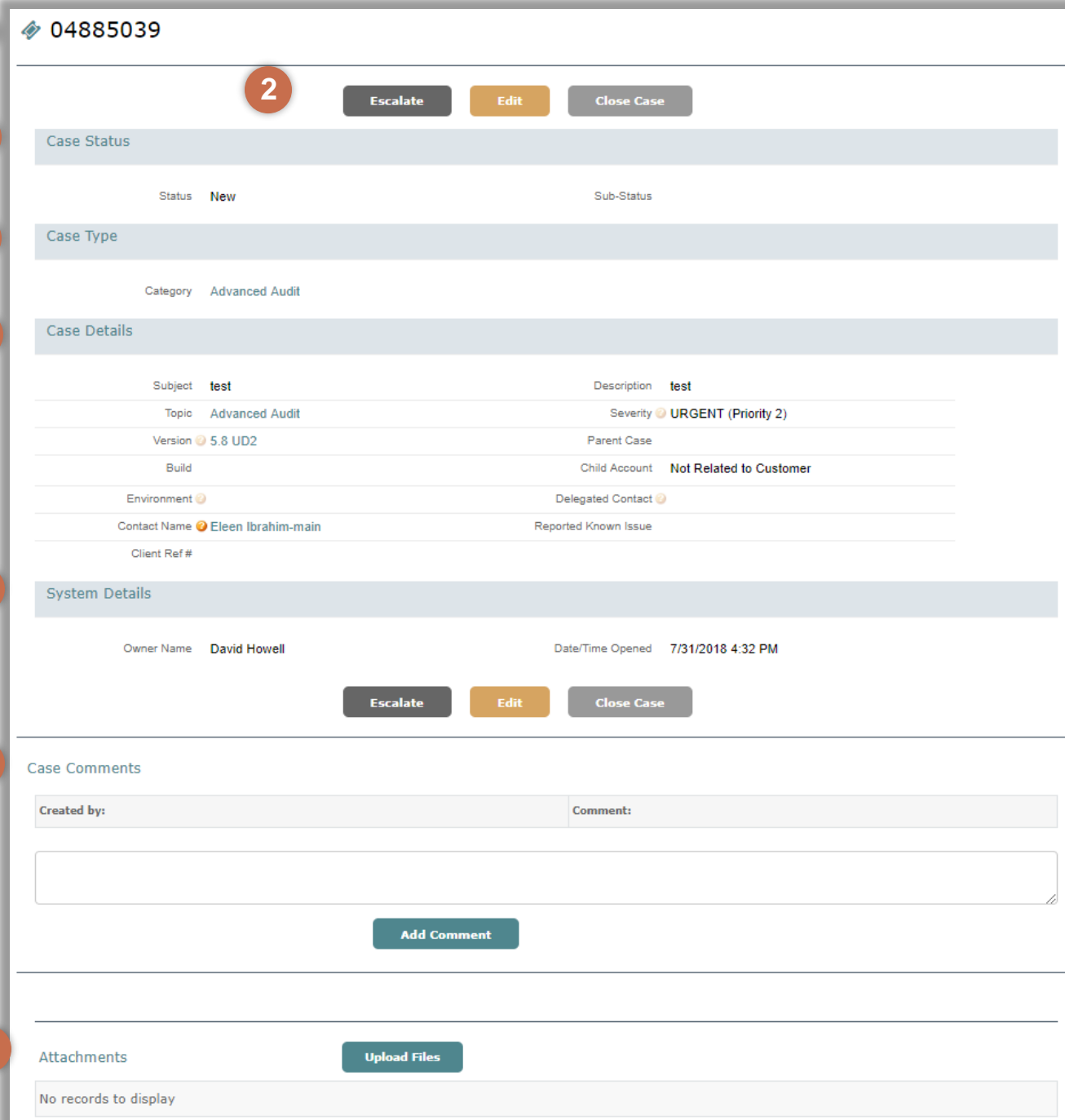
Case Creation Email

Once your case has been created, you, and the delegated contact (if selected), will receive a case confirmation email from 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 your email address in your [my profile tab](#) to ensure that your email is correct.



Anatomy of a Case



The screenshot shows a case management interface with the following sections and callouts:

- 1**: Case Number (04885039)
- 2**: Case Actions (Escalate, Edit, Close Case buttons)
- 3**: Case Status (Status: New, Sub-Status)
- 4**: Case Type (Category: Advanced Audit)
- 5**: Case Details (Subject: test, Description: test, Topic: Advanced Audit, Severity: URGENT (Priority 2), Version: 5.8 UD2, Parent Case, Build, Child Account: Not Related to Customer, Environment, Delegated Contact, Contact Name: Eleen Ibrahim-main, Reported Known Issue, Client Ref #)
- 6**: System Details (Owner Name: David Howell, Date/Time Opened: 7/31/2018 4:32 PM)
- 7**: Case Comments (Created by, Comment, Add Comment button)
- 8**: Attachments (Upload Files button, No records to display)

- 1. Case Number** – 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 category for the case.
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 would be included in the Reported Known Issue field.
Note: Subject, description, and reported known issue are all searchable in global search.
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.

Case Attachments

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 support is actively working.

? ACTIVE CASES CREATE CASE

<p>CASE #: 04884949 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>Pending Customer Response</p> <p>Screen is blank</p>	<p>CASE #: 04884951 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>Pending Customer Response</p> <p>Need help with claims</p>	<p>CASE #: 04884953 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>Pending Customer Response</p> <p>Slow performance</p>
<p>CASE #: 04884952 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>New</p> <p>How do I undo a patient...</p>	<p>CASE #: 04884950 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>New</p> <p>System is slow</p>	<p>CASE #: 04884948 VIEW</p> <p>CREATED DATE: 07/24/2018</p> <p>New</p> <p>Link isn't working</p>

[VIEW ALL CASES >](#)

Cases Tab - List Views

Cases will display in multiple list views, depending on 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 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
<p>All Cases All cases for your organization. Includes both open and closed cases in any status.</p>
<p>All Closed Cases All closed cases for your organization. Includes both support and critical issues cases.</p>
<p>All Closed RCM Cases* All closed RCM cases submitted by NextGen Healthcare on behalf of your organization.</p>
<p>All My Closed Cases All closed cases, originally opened by you. Includes both support and critical issues cases.</p>
<p>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.</p>
<p>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.</p>
<p>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.</p>
<p>All Open RCM Cases* All open RCM cases submitted by NextGen Healthcare on behalf of your organization.</p>
<p>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.</p>
<p>My Account's API Cases All open API cases for your organization.</p>
<p>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.</p>
<p>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.</p>
<p>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.</p>
<p>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.</p>
<p>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.</p>
<p>Recently Viewed Cases Cases that you have recently viewed.</p>



**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.

Search Results

Search Feeds: test **Search Cases** Options...

Records: **Cases (25+)** Show Filters

Accounts (1)
Activities (0)
Articles (25+)
Asset Relationships (0)
Attachments (2)
Case Comments (0)
Cases (25+)

◀ Previous Page (1-25) Next Page ▶

Action	Case Number	Subject	Status	Sub-Status	Date/Time Opened	Case Owner Alias	Legacy System ID	Client Ref #
Edit	04884923	jean test after hour	New		7/9/2018 2:46 PM	dkenn		
Edit	04884955	Test for Notifications	New		7/24/2018 3:11 PM	mmazzate		

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: <ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.

What if I open a case via email after go-live?

You will receive an email to log on to the Success Community to submit a case.

Will my historical cases be in this new community?

Open cases will be migrated into the Success Community.

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.

When opening a new case, will the product version automatically populate if the information was added to the server information window?

No. The NextGen version will not auto-populate from the server information.

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 of 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 of your practices listed in the Child Account field, please open a new case with the Product Category “Community” and NextGen Healthcare will assist you.