



# Ideas Best Practices

NextGen Healthcare Success Community

[www.community.nextgen.com](http://www.community.nextgen.com)

v.7

Updated 4.22.2021



<b>TIPS ON USING IDEAS</b>	<b>3</b>
<hr/>	
<b>SIMULATION VIDEOS FOR IDEAS</b>	<b>3</b>
<b>SEARCHING IDEAS</b>	<b>3</b>
<b>USING GLOBAL SEARCH</b>	<b>3</b>
<b>FROM THE IDEAS TAB</b>	<b>4</b>
<b>SUCCESS COMMUNITY HOME PAGE</b>	<b>4</b>
<b>POSTING IDEAS</b>	<b>5</b>
<b>IDEA STATUSES: UNDERSTANDING WHAT THEY MEAN</b>	<b>6</b>
<b>VOTING ON IDEAS</b>	<b>7</b>
<b>PROMOTE YOUR IDEAS</b>	<b>7</b>
<b>IDEA TRACKING</b>	<b>7</b>
<b>IDEAS REVIEW PROCESS</b>	<b>8</b>
<b>RULES OF ENGAGEMENT</b>	<b>8</b>
<b>FREQUENTLY ASKED QUESTIONS</b>	<b>9</b>
<hr/>	
<b>WILL NEXTGEN HEALTHCARE RECATEGORIZE IDEAS IF PLACED IN THE WRONG CATEGORY?</b>	<b>9</b>
<b>ARE YOU ABLE TO CHANGE YOUR IDEA PROMOTE/DEMOTED VOTE?</b>	<b>9</b>
<b>CAN I VOTE ON MY OWN IDEA?</b>	<b>9</b>
<b>CAN PEOPLE SEE WHO PROMOTED AND DEMOTED IDEAS?</b>	<b>9</b>
<b>CAN NEXTGEN HEALTHCARE EMPLOYEES SUBMIT AN IDEA ON BEHALF OF A CLIENT?</b>	<b>9</b>
<b>HOW DOES NEXTGEN HEALTHCARE MANAGE THE PRODUCT ROADMAP?</b>	<b>10</b>
<b>WHO DO I REACH OUT TO IF I HAVE QUESTIONS ABOUT IDEAS?</b>	<b>10</b>



## Tips on Using Ideas

Success Community Ideas are a great way to use the social aspect of the Community to submit and gain support for enhancements and innovations you can potentially see in NextGen® Healthcare products and services! Your ideas are an integral part of the release planning process that NextGen Healthcare goes through to shape the product roadmap. By casting your votes in Ideas, you can influence the product roadmap by supporting the ideas that are most important to you.

## Simulation Videos for Ideas

See how to use Ideas by watching our quick training simulation videos. Click on the links below to watch:

- [Searching for and Voting on Ideas](#)
- [Posting an Idea](#)
- [Tracking an Idea](#)

## Searching Ideas

### Using Global Search

You can search for any idea using the global search bar at the top of the Success Community. You can search by either **search terms** or by the **idea number**. The system will search the entire community.

If there are any ideas that include your search terms, they will appear on the search results page. To only see search results that are ideas, select the **ideas** record type from the left menu.

**Search Results**

Search Feeds: spell check [Search Ideas] Options...

Records: Accounts (0), Activities (0), Articles (25+), Asset Relationships (0), Attachments (0), Case Comments (0), Cases (4), Certification Exams (0), Contacts (0), Documents (0), Email Messages (9), Files (15), Folders (0), Groups (0), **Ideas (10)**, Individuals (0), Known Issues (22), MCS Assets (0), Notes (0), People (0), Products (0)

Ideas (10) Hide Filters

Specialty: --None-- [Apply Filters] Search Filters Help ?

Title	ID	Idea Body	Comments	Posted By	Categories	Specialty	Status	Date/Ttr
Spell Check in EHR	IDEA-0045	As a user I would like the ability to be able to spell check free text information documented on templates, documents, forms and comment fields.	57	jmetzier	EHR		Delivered	2/26/201
Add spell check inside template editor	IDEA-7052	Would be beneficial to spell check labels and captions when building templates!	0	jhaines1.5059994245956091E12	EHR		Awaiting Client Voting	3/2/2018



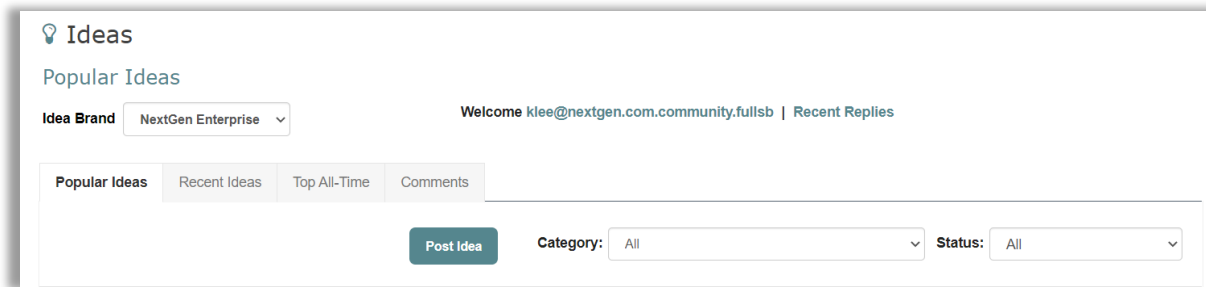
Learn more about using global search by watching the [Using the Global Search](#) simulation video.

### From the Ideas Tab

There are several ways to locate ideas to vote on from the Ideas tab.

By default, you can view ideas by **Idea Brand** and based on four tabs:

- **Popular Ideas** – Ideas with numerous votes and recent activity, such as comments and votes
- **Recent Ideas** – Ideas that have been recently submitted
- **Top All-Time** – The most popular ideas of all time
- **Comments** – The most recent comments on ideas



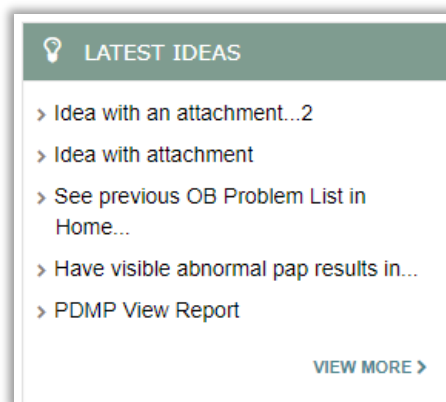
You can then filter each tab by **category** and **status** to only see ideas for a specific product or ideas that are in a certain phase of the ideas process, such as “New.”

### Success Community Home Page

The latest ideas submitted are always listed on the home page of the Success Community for immediate viewing.

You can do the following from the home screen:

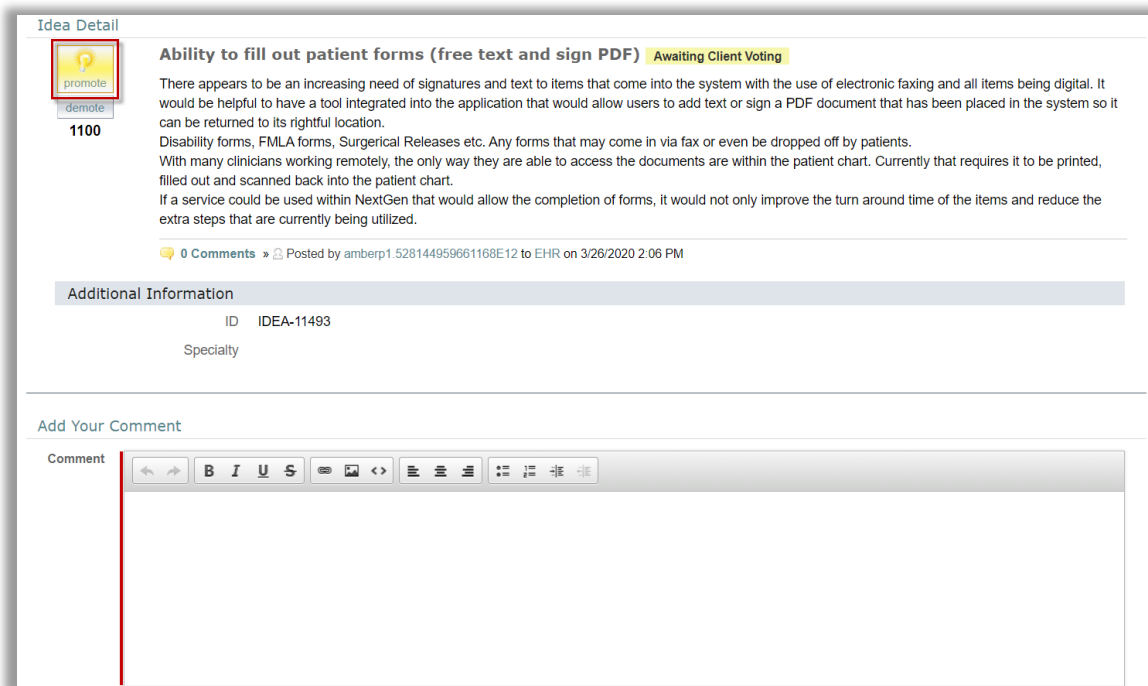
- Click on each idea to learn more about it and vote
- Click **View More** to be directed to the Ideas tab



## Posting Ideas

To post an idea, check out our [Posting an Idea](#) simulation video.

**Have an idea? Search, then post your idea.** Before posting a new idea, search to see if it already exists. Another community member might have had the same idea and already added it to Ideas. If it exists, great! Click the **promote** icon to vote for the idea. You can also add a comment to support the idea by using the comment box.



**Idea Detail**

**Ability to fill out patient forms (free text and sign PDF)** Awaiting Client Voting

**1100**

There appears to be an increasing need of signatures and text to items that come into the system with the use of electronic faxing and all items being digital. It would be helpful to have a tool integrated into the application that would allow users to add text or sign a PDF document that has been placed in the system so it can be returned to its rightful location.

Disability forms, FMLA forms, Surgical Releases etc. Any forms that may come in via fax or even be dropped off by patients.

With many clinicians working remotely, the only way they are able to access the documents are within the patient chart. Currently that requires it to be printed, filled out and scanned back into the patient chart.

If a service could be used within NextGen that would allow the completion of forms, it would not only improve the turn around time of the items and reduce the extra steps that are currently being utilized.

0 Comments • Posted by amberp1.528144959661168E12 to EHR on 3/26/2020 2:06 PM

**Additional Information**

ID IDEA-11493

Specialty

**Add Your Comment**

Comment

If you've searched and are unable to find an existing idea, click on the **Post Idea** button to submit a new idea. When entering your idea, you will be required to enter a clear and descriptive title, add a detailed description, and select the appropriate product category(s). Once you have filled in the required fields, click **Post** to submit your idea.

There are few things to keep in mind when posting an idea:

- **Clearly describe** your idea by including *what* challenge or business need your idea fulfills, and *why* it is needed. This helps community members relate to your idea and helps NextGen Healthcare product managers understand the underlying business need the enhancement would address.
  - This is an example of a well written idea:
    - Summary: 'Billed in Error' functionality allows for corrections to services billed incorrectly.
    - What problem does this solve? (business need): If the wrong code or wrong start, stop and duration details are entered for a charge, a mechanism is needed for clinical staff to remove the charge billed in error.



- Here is another example of a well written idea:
  - Summary: Update Behavioral Health Crisis Contact Note template to accommodate Crisis Services workflow.
  - What problem does this solve? (business need): Practices providing acute crisis services and crisis line services need the ability to document contact in a crisis setting, track crisis line calls, and manage crisis-specific progress for patients.
- Note that Ideas is for posting and crowd sourcing new enhancements to NextGen Healthcare products. It is *not* for reporting defects on existing functionality. Please report defects by creating a support case.
- **Add images, links, or attachments** to your idea description to help other community members and NextGen Healthcare staff fully understand your enhancement suggestion.
- **Be specific.** Community members often come across ideas when searching using the global search. What words would someone search to find your idea?
- **One idea per post.** If you have five great enhancement suggestions, submit them as five different ideas. This lets community members and NextGen Healthcare know exactly which idea they are voting for or implementing.
- **Have your own idea.** If you're reading an idea and you want to add a feature to it, create your own idea instead of noting it in the idea comment section. This way, other community members can vote for your idea as well. It also keeps your great idea from being missed in a chain of comments.

### Idea Statuses: Understanding What They Mean

When you are viewing an idea, the yellow status indicator will let you know where an idea stands in the review process. Below is the definition for each of the statuses available:

Status	Description
<b>New</b>	Default status for all ideas.
<b>Awaiting Client Voting</b>	The idea has been confirmed as original. It is ready to gain community support. This is the best idea to vote on and share.
<b>Existing Feature</b>	The idea is featured in an existing product/solution. No further updates will be made on the idea by NextGen Healthcare.
<b>Focus Group</b>	The idea is under review by NextGen Healthcare and has been moved to a focus group for further discussion.
<b>Under Review</b>	The idea is under review by NextGen Healthcare for roadmap consideration.
<b>On the Roadmap</b>	The idea has been added to a product/solution roadmap for future release.
<b>Delivered</b>	The idea has been delivered by NextGen Healthcare and is available for general use.



<b>Partially Delivered</b>	Part(s) of the idea has been delivered by NextGen Healthcare and is available for general use.
<b>Requesting Information</b>	The idea requires additional information or clarification.
<b>Not Planned</b>	The idea is not aligned with the NextGen Healthcare mission and is not under consideration for our short- or long-term development roadmap.
<b>Closed</b>	The idea was entered by mistake and was intended for some other aspect of the community such as cases or chatter.
<b>Archive</b>	NextGen Enterprise EHR, NextGen Adaptive Content Engine, or NextGen Enterprise Patient Portal ideas that were part of the 2021 Ideas Reset Initiative but did not meet the 800-point threshold for further review by NextGen Healthcare.
<b>2021 Ideas Reset Initiative</b>	Temporary status for NextGen Enterprise EHR, NextGen Adaptive Content Engine, or NextGen Enterprise Patient Portal ideas up for review in the 2021 Ideas Reset Initiative. After the 4-month review period, these ideas will either be considered for further review or archived.

## Voting on Ideas

You can vote up (promote) or vote down (demote) ideas based on your interest. Every community member's vote is the equivalent of 10 points. The more you vote on an idea, the better its chances of being reviewed and implemented.

Although you may vote for as many ideas as you want, you may cast only one vote per idea. Once you cast your vote, you can't change it.

Each Success Community member in your practice has the ability to vote on ideas.

There is no weighting of ideas based on practice size.

## Promote Your Ideas

Looking for ways to promote your ideas? Here are some suggestions:

- Post in a Chatter group
- Involve your colleagues
- Share at a user group meeting
- Message other clients (@mention) with similar ideas to vote on yours as well

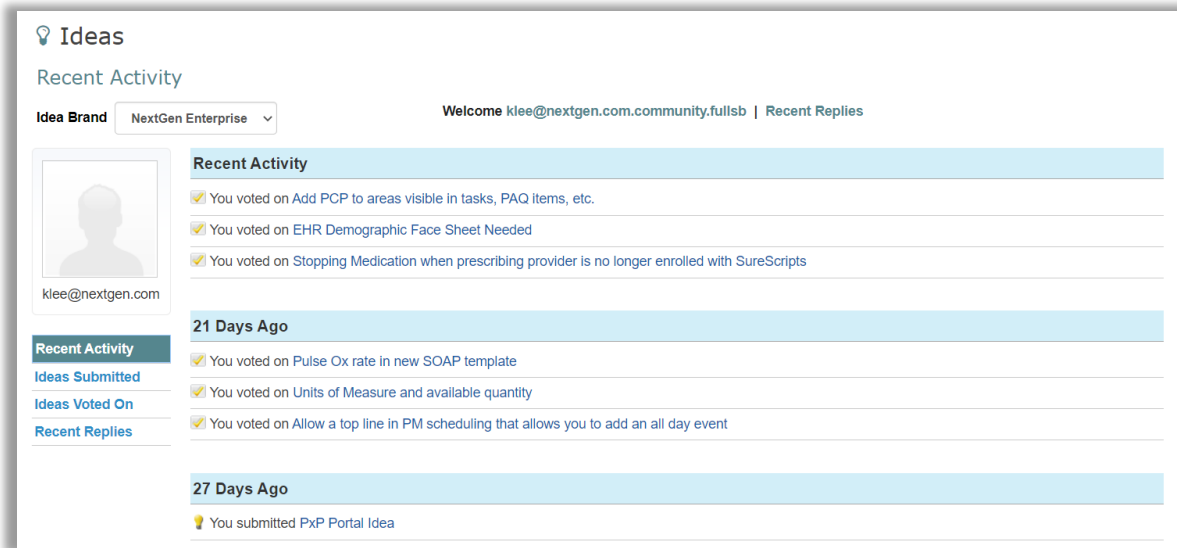
## Idea Tracking

Keep track of the ideas that you have engaged with in the Success Community. In the Ideas tab, click on your username. This opens your Ideas profile where you can see the following:

- **Recent Activity** – What was your last comment? See it here.
- **Ideas Submitted** – Check on the performance of your ideas by clicking on this link.
- **Ideas Voted On** – Check on the progress of other ideas that you have voted on. Has a request moved up a status? Has NextGen Healthcare responded?
- **Recent Replies** – See any new comments on ideas that you have also commented on.



Additionally, as the idea creator, you will receive **email notifications** each time your idea changes status.



**Hint!** You can click on the usernames of other community members to see this information about them. This is a great way to see the activity of others from your practice.

## Ideas Review Process

**Continuous review of ideas.** Ideas are routinely reviewed by NextGen Healthcare to verify that an idea isn't an existing feature, a support or defect request, a complaint only, or a duplicate of an existing idea. If an idea does not fall under any of these categories, it will be moved to the Awaiting Client Voting status where it will remain until NextGen Healthcare, after fully assessing the impact of the idea on the roadmap, provides an official response.

The timing for an idea to move through the entire review cycle can vary substantially based on several variables including our existing product roadmap, complexity of the idea request, client interest and vote collection, and downstream impacts on implementation. Due to this variation, NextGen Healthcare cannot provide a definitive timeframe on when we will provide an official response to the idea (either changing the status or commenting), and the process may take up to 6 months.

## Rules of Engagement

To ensure the Ideas environment is welcoming and collaborative, we have established a few rules of engagement.





## Ideas Dos

- **Participate!** Ask Questions, share information, and engage with community members.
- **Be specific and succinct.** A clear idea will ensure that other clients and NextGen Healthcare have a true understanding of your enhancement requests.
- **Be social on Chatter** to inform other community members of your ideas and potentially earn more votes.
- **Be Respectful.** Even in disagreement, remember to be engaging but courteous and respectful.

## Ideas Don'ts

- Post confidential or HIPAA-regulated information on profiles or public groups.
- Post obscene, indecent, hateful, offensive, defamatory, abusive, harassing, or profane material.
- Post spam, advertisements, or other soliciting materials.
- Post personal messages, jokes, or non-professional items. This is a client-facing forum.

The Online Community Manager reserves the right to remove any posts that exhibit these characteristics.

## Frequently Asked Questions

### Will NextGen Healthcare recategorize ideas if placed in the wrong category?

Yes. NextGen Healthcare will recategorize ideas where applicable.

### Are you able to change your Idea promote/demote vote?

No. You can only vote on an idea once.

### Can I vote on my own Idea?

By default, when you create an idea, it starts with a score of 10, representing your vote.

### Can people see who promoted and demoted ideas?

Yes. The last 100 voters are listed under an idea by their username.

### Can NextGen Healthcare employees submit an idea on behalf of a client?

Clients should submit their own ideas directly on the Success Community.



### **How does NextGen Healthcare manage the product roadmap?**

Many sources contribute to NextGen Healthcare's product roadmap. Success Community Ideas is one integral source. Other sources include NextGen Healthcare Be Part of Better client engagement groups, specialty consortiums, regulations and standards coming from federal and state governments, grant opportunities, professional organizations, NextGen Healthcare Large Client User Group (LCUG) and NextGen Healthcare client-facing teams.

NextGen Healthcare product managers compile all requests and needs and work with internal teams to prioritize them. This requires a balance that takes all sources into consideration so that the backlog list can be developed, and product decisions can be made benefiting the largest number of users.

### **Who do I reach out to if I have questions about Ideas?**

Your Account Manager can assist you with any questions you might have about Ideas.