



NextGen Upgrade Guide for IT:

A Step-by-Step Approach
to Successful Analysis, Planning,
and Testing



Upgrade your NextGen[®] Enterprise EHR without missing a beat

Staying on top of updates for mission-critical software such as your NextGen electronic health record (EHR) can be challenging for IT departments. Releases typically occur once or twice a year and bring new enhancements, features, and fixes. NextGen[®] Enterprise Spring '21 (v6.2021.1) is a major release with many robust capabilities to enhance the patient and provider experience and keep you in compliance with the 21st Century Cures Act. A successful upgrade project takes a strategic and well-planned approach so your IT resources can also maintain their focus on other important initiatives. We're here to help ensure your success.

This NextGen Upgrade Guide for IT lays out proven strategies to upgrade your EHR as smoothly and efficiently as possible so your practice can get back to what it does best—taking care of patients.

Updates contribute to a healthy IT system. We're here to help you succeed.

Determine your “why”

Before you get started, take a step back and analyze why you need this new release. For many practices, there’s no question it has to happen as soon as possible. Some practices may be able to wait and upgrade NextGen at a time that better matches other IT plans and initiatives.

Make sure you understand these three important elements of the NextGen v6.2021.1 release:

1. Regulatory compliance. The new release fully supports compliance with the 21st Century Cures Act, including new information blocking requirements, and is on track to meet ONC 2015 Edition Cures Update Criteria for Merit-Based Incentive Payment System (MIPS) requirements.

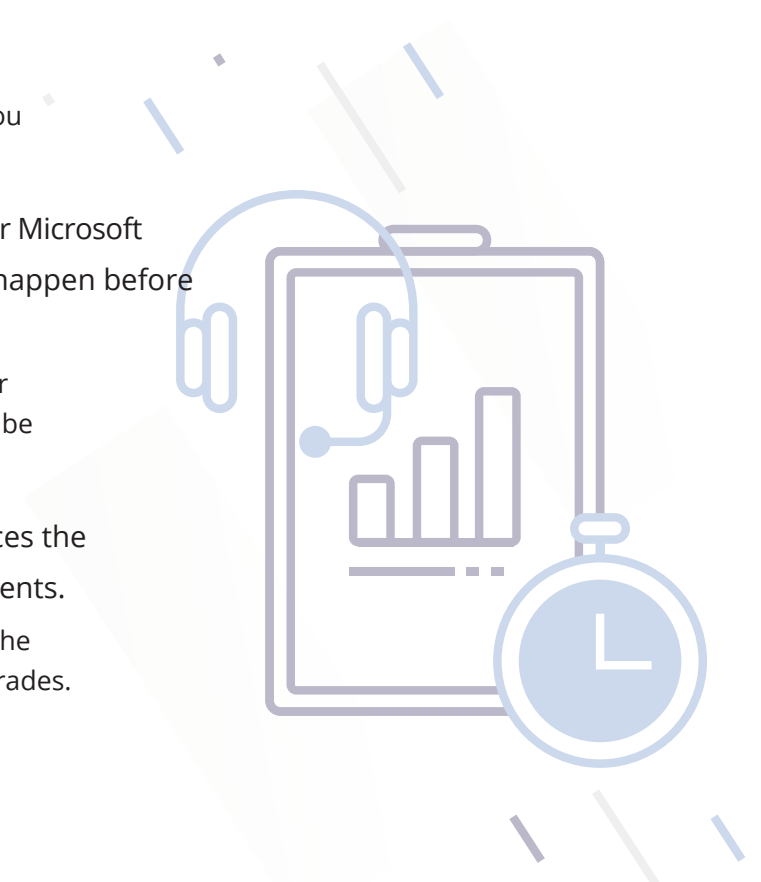
Important: If your providers participate in MIPS, you must upgrade to 6.2021 prior to 2023 reporting. While 2023 may sound far-off, there may be several time-consuming steps before you can complete your upgrade in production.

2. Latest operating systems. The new release requires the latest operating systems (OSes) for Microsoft Windows, Windows Server, and SQL Server. If you need to update those as well, that must happen before you begin your NextGen upgrade.

Important: OS and database upgrades can have unintended consequences, such as a need for updated server hardware. If you’ve been considering moving your EHR to the cloud, this might be the tipping point.

3. New patient portal. With this release, the new Patient Experience Platform (PxP) replaces the Patient Portal, providing a better web presence and more user-friendly experience for patients.

Important: The Patient Portal will no longer be integrated in NextGen v6.2021 and higher, so the new PxP portal must be installed and migrated at the same time as the EHR and database upgrades.



Additional tips to figure out your “why”

Read the Overview Brochure on new major releases. This will give you quick highlights on the best items this release has to offer and is a great option to share with others in your organization to help make your case on why this release is important.

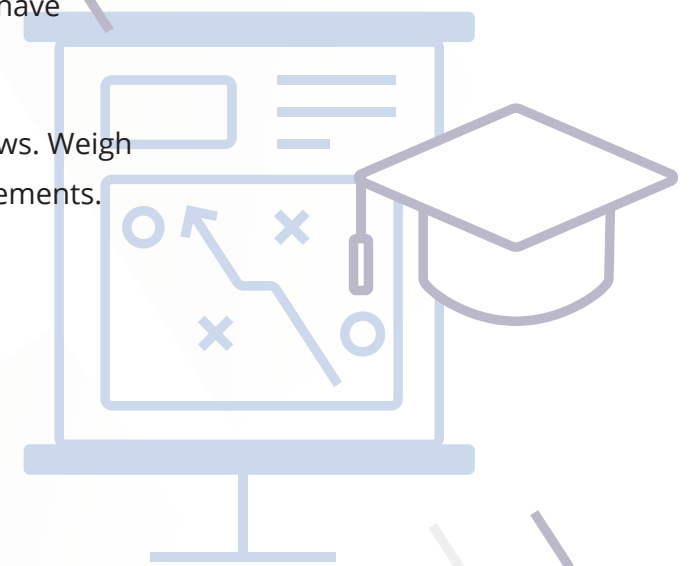
Review the Release Notes. These documents are produced for every patch update and list each known issue fixed. You can easily search on the Known Issue (KI) number if you have one available. If you've been waiting for an important fix, this is where you'll find it.

Watch available New Feature Webinars. These give you a nice visual presentation of what to expect in the new release. Many times, these are recorded so you can watch them when it's most convenient for you. If you can attend a live session, this is a great time to ask the presenter specific questions.

Put the upgrade in context. Consider what other IT initiatives are in your plans, and whether the upgrade fits with those plans and budgets. If you don't have to upgrade immediately, you may have some breathing room to perform the upgrade when it's most appropriate for your needs.

Think beyond IT. Major upgrades can require significant changes in provider and staff workflows. Weigh the pros and cons with stakeholder groups beyond IT and consider staffing and training requirements.

When you're ready, create your upgrade plan using our proven, step-by-step approach.



Step 1 Establish your project team and roles

Determine who is going to be on your project team and what role they need to play. Consider all the various jobs affected and areas of the NextGen EHR or practice management (PM) system they use.

Ask yourself:

- Do you have the right people involved?
- Who can lead the project through completion?
- What workflows do you need to consider and have you included those users in your team?
- Who needs to manage testing and training?



Step 2 Review the technical requirements

Review the new infrastructure requirements with your technical team. Each NextGen version has its own specific requirements you need to be aware of.

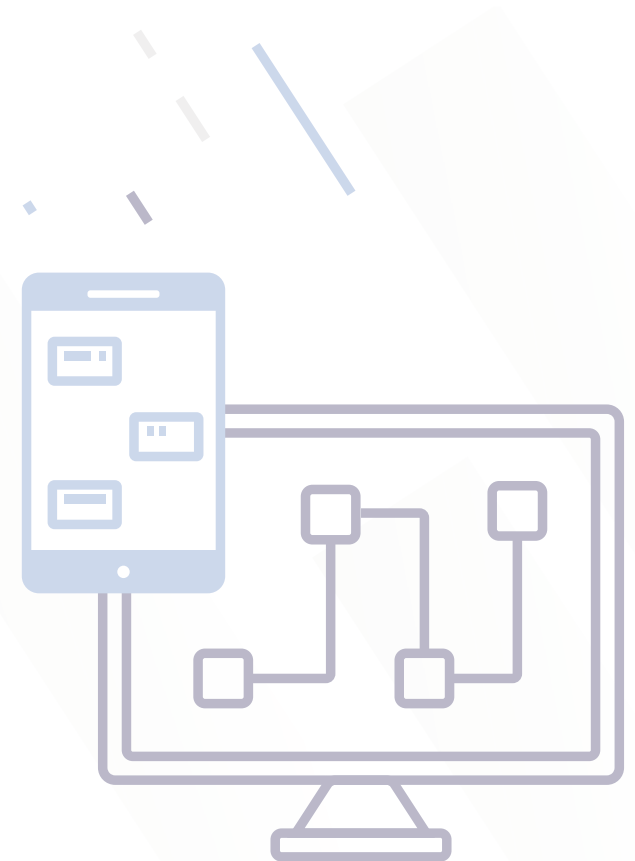
Technical considerations:

- Research hardware requirements for the new NextGen version as well as those for OS updates. Hardware requirements may include processor, memory, and storage upgrades, and could introduce potential bandwidth issues as well. These infrastructure changes may prompt discussions about what's the right hosting environment going forward, especially if you're hosting on-premise. The right managed cloud hosting environment will always have the most up-to-date hardware and software, which keeps performance at its peak and reduces upgrade headaches.
- If you're currently on an older NextGen version that doesn't support the new OS version required for v6.2021, you may need to take multiple upgrade steps for your NextGen software.
- Never upgrade your NextGen software at the same time you are making major hardware or other infrastructure changes—each change must be thoroughly tested and moved to production before the next change begins. Otherwise, if an issue arises you may struggle to find the cause, which in turn will slow down your resolution time.

Step 3 Inventory your NextGen applications

A major upgrade is a great time to look at exactly what your organization is using and why. You may discover that there are legacy applications that are no longer being used or that don't perform well, or that you have third-party applications that can be replaced with new NextGen ancillary applications.

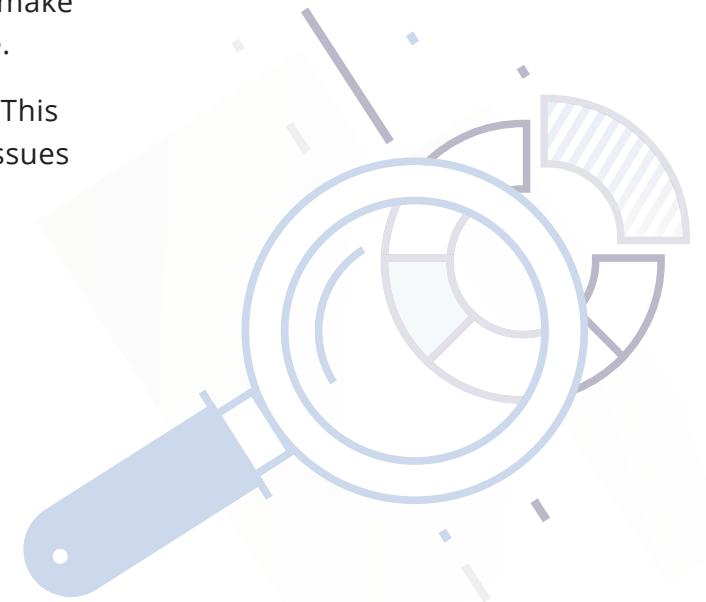
- Develop a list of all NextGen ancillary applications such as Rosetta, NextGen Communication Services, and Advanced Audit, which may also need to be upgraded. Make sure you know everything you have so nothing is missed.
- Don't overlook third-party products that integrate with NextGen. Check with those vendors and let them know you're doing an upgrade. Find out if there is anything you need to do to avoid a service interruption.
- Decide if you need to test any interfaces. If so, check with those vendors to ensure they have a way to receive test messages and connect to an additional non-production database during testing.



Step 4 Perform a gap analysis

This is an incredibly important step to undertake with any major upgrade. Simply put, a gap analysis is finding out what the differences are between where you are now and where you are going to end up. Most of the time this refers to your NextGen EHR templates, but this approach can be used to evaluate the entire application

- If your organization uses customized templates, compare your current templates to the new ones coming in and identify where you need to make any new adjustments. Never assume you can use your same customized templates in the new version without thorough testing.
- If your templates are based off the NextGen Adaptive Content Engine (formerly KBM), make plans to move any important customizations to the new version of that same template.
- This is an ideal time to evaluate each template and see if you still need customization. This may be because workflows have changed, or because the new release addresses the issues that prompted the customization in the past.



Step 5 Create a test plan

The [NextGen Success Community website](#) provides formal testing guides but every organization is different, and the guides are just that: guides to get you started. A test plan specific to your needs will help you identify issues and find a resolution during testing, which is one of the best ways to avoid headaches once you go live.

- Consider the unique workflows in your organization. Coordinate with every stakeholder group about what they do every day and ensure that is added to your list for testing.
- Think about what issues have occurred in past upgrades and incorporate that into your test plan.
- Decide who is going to do your testing. Include people who do these workflows in their everyday jobs, and people with attention to detail to capture any potential issues.



Step 6 Establish your test environment

NextGen gives you a license for four different databases specifically to give you three non-production environments for testing purposes.

- Pick a non-production database for testing.
- Consider what's going on in the other databases and ensure you aren't wiping out someone else's work before you start.

Update Universal & System Preferences:

- Preference List
- Lab reports
- User MSTR
- Patient email
- Page
- Printer preference detail
- Patient documents
- Storage
- Storage
- BBP package job setting
- Patient images
- Patient notes

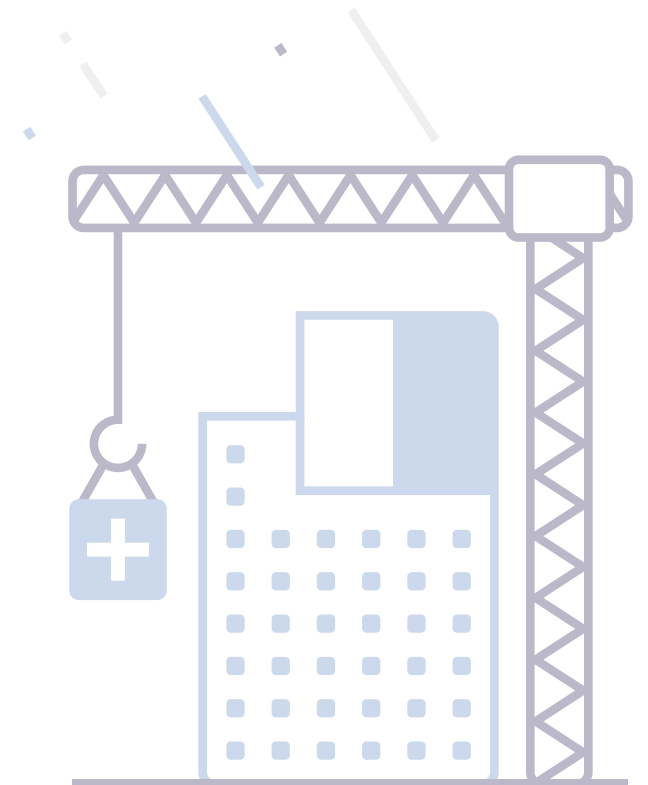
NextGen is heavily dependent on enterprise and system level preferences, which should be updated programmatically or via system administrator and file maintenance in preparation for production go-live.

Step

7

Start a change log

- Log anything that is changed in test to ensure those changes are also made in production.
- If you customize your NextGen templates, keep track of any changes you make. You'll thank yourself later and this will make each future upgrade even easier.



Step 8 Plan for training

Never underestimate the positive impacts of a great training plan, especially if you're introducing a lot of change. This step helps ensure your employees are primed for success.

- As you review the new version in your test environment, take note of anything you may need to train your organization's users on so they have a great experience.
- Determine a plan for required training, including who needs to be included and what order it needs to be presented.
- The NextGen Learning Center is an online self-service option for those that learn best on their own.
- Don't hesitate to bring in a training consultant to help you come up with the best approach for your specific situation.
- Give yourself time for the amount of training your employees need. This is not something to rush.



Step 9

Develop a to-do list for before and after the upgrade

You'll want to start your upgrade with no critical or unfinished tasks hanging over your head. And remember, when you add or change something in the test environment, it's not automatically replicated in the production environment—these are separate databases. Creating before and after lists throughout your upgrade preparations and testing will help ensure a smooth go-live.

..... Before the Upgrade

- Generate all your EHR documents.
- Generate all your claims.
- Post payment batches.
- Ensure all users are logged out.

..... After the Upgrade

- Make note of anything to reconfigure in production after the upgrade is done but before users log in.

Step 10 Have a plan for go-live support

Depending on how much change the upgrade is introducing, you may want to plan for one to three days of go-live support to help employees through the process.

- Look back at previous NextGen upgrades to see what worked and what didn't, and where the biggest training issues were.
- Ask managers in each department for input on where they think the biggest training issues are likely to be.
- Consider training a few super users at each location to answer questions and help anyone who is struggling.
- Alternatively, create a command center where users can call for help.
- If you don't have enough resources in-house, consider bringing in an outside consultant to bridge the gap.



Step

11

Communicate early and often

A good communication plan is easy to overlook, but can be one of the most important elements of a successful NextGen upgrade. Just because you and your IT team know what's happening doesn't mean everyone else does. And changing the software that every employee depends on can introduce a lot of stress and frustration.

- For major upgrades, schedule regular communications to employees, including emails and calendar updates as well as meetings and signs in areas like break rooms.
- Tell them not only what is changing, but also why, when, and how they can prepare.
- Reassure them with relevant details from the rest of your plan, such as when they'll receive training and what support will be available to them on go-live.
- Help them understand how this upgrade will impact their day-to-day processes, as well as how it will impact patients.
- If appropriate, develop a communication plan for patients so they understand that staff and providers are learning a new system or incorporating new processes. This is especially important if your patient portal is being upgraded to the new NextGen PxP at the same time.

Make sure your critical systems are in the right place for your NextGen upgrade

Proven best practices will help you successfully navigate your NextGen upgrade. But one of the best things you can do is to ensure that you have the best infrastructure for your mission-critical EHR software.

Hosting your NextGen application and data in the cloud built for healthcare ensures that:

- Your datacenter hardware and software are completely up-to-date.
- Your systems always run at peak performance, using proven technologies and processes.
- Your patient and practice data and applications are secure and compliant, now and every day.

Talk to our NextGen and healthcare IT experts about how you can be prepared for whatever the future holds.

CONTACT US AT
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