

Change Requests Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

v.1 Updated 8.17.22



MANAGING CHANGE REQUESTS	3
APPROVING CHANGE REQUESTS	3
CHANGE REQUEST TAB - LIST VIEWS	7
LIST VIEW DESCRIPTIONS	7
FREQUENTLY ASKED QUESTIONS	8
HOW WILL THE DESIGNATED CLIENT CONTACT FOR A CHANGE BE IDENTIFIED?	8
WHAT HAPPENS TO A CHANGE REQUEST THAT IS NOT APPROVED OR REJECTED?	8



Recommended prerequisite reading: Success Community Getting Started Guide

Managing Change Requests

Change requests are non-standard changes to services, software, shared resources, or any critical component within an environment. NextGen Healthcare will review, assess/evaluate, authorize, plan, and coordinate change requests.

Approving Change Requests

Once a change request is initiated by NextGen Healthcare, it will be assigned to a contact from your organization to approve or reject the change. To prevent delays, change requests should be reviewed promptly, as any change requests not responded to will remain pending.

There are two ways to approve a pending change request.

1. **Email:** A designated contact from your organization will receive an email notification with a link to *Approve* or *Reject* the change request.

You can also reply to the email with one of these words in the first line of the email message: APPROVE, APPROVED, REJECT, REJECTED. If rejecting the request, you must provide the rejection reason on the second line.

There is a new Change Request pending your approval. Please click the following link to log in to the Success Community to review the details and approve or reject the request https://nextgenhealthcare-fullsb.sandbox.my.site.com/nge/a3H76000000Dtb
You can also reply to this email with one of these words in the first line of the email message: APPROVE, APPROVED, REJECT, REJECTED. If rejecting the request, you must provide the rejection reason on the second line.
Change Request Description: SQL Server Change
Thank you.

2. **Success Community:** Click on the *Change Requests tab* from the Success Community home screen.

	NextGe	en Enterprise Ex	perience 👻							
	nextg	en suc	CESS MUNITY				Search	Q,	Profile	Log Out
ľ		Home	Cases	Assets	Knowledge	Change Requests	Known Issues	Services	Ideas	Chatter



Under View, choose Client Pending Approval Change Requests and click Go.

NextG	en Enterprise Exp	perience 👻					
nextg			Search	Q			
	Home	Cases	Assets	Knowledge	Change Requests	Known Issues	Services
Chang Home View: All C Clied Clied Recent C	e Reques	sts equests equests ange Requests oval Change Re nge Requests ests	quests	io!			

You will see a list of change requests pending your approval. Click on the *CR Number* to review the details of the change request.

NextGen	Enterprise E	kperience 👻								
next ge	n. suc	CESS IMUNITY					Search		Q Profile	Log Out
	Home	Cases	Assets	Knowledge	Change Request	s Ki	nown Issues	Services	Ideas	Chatter
Client Pending	Approval Ch	nange Requests	~							đ
0					A B C D	E F G H	I J K L M	N O P Q R S	T U V W X	YZ Other All
CR Number +	s	ubject	Descri	ption	Reason for Change	Scheduled	Date of M	Iodule	Change Reque	est Status
CR34950			SQL Se	rver Change	Test	8/5/2022 11	:30 PM		Scheduled - Pe	nding Approval
CR34949			SQL Se	erver change	SQL Server change	8/5/2022 11	:00 PM		New	



On the Change Request screen, review the change request details and scheduling information.

Under Client Approval History, click Approve / Reject to respond to the change request.

NextGen Enterprise Exper	ience 👻						
nextgen succes					Searc	ch	Q Profile Log Out
Home	Cases	Assets	Knowledge	Change Requests	Known Iss	ues Services	Ideas Chatter
Change Request							
CR34950							
- Show Feed							
« DACK TO LIST							
Change Request Detail		٩					
Client Approval History							
Action		Date		Status	Comments	Ove	erall Status
Step:Client Approval		00/4/0000 4/		Deedler her Menne Menne		<mark>0</mark> F	Pending
Approve / Reject		08/4/2022 1	0:19 AM	Pending by: <u>Vanessa Moran</u> Submitted by: Vanessa Moran	Approval reque	ost	
		00/4/2022 1	0.19 AW	Submitted by: variessa woran	Approvarieque	551.	
✓ Information CR Numb	CR240	-			Oumor	Change Beguest Que	
Change Request State	er CR349	oU Jod Donding Au	pproval		Environmont	Change Request Que	Je [Change]
Accou			pproval	Ott	her Environment @	Floduction	
Catego	rv		saluicare	0.	Module		
Doma	in				Other Module		
Change Desuget Dete	11-						
		n er Change					
Reason for Chan		iver change					
Name of Server Affecte							
Impa	ct ()						
- Scheduling Info							
Scheduled Date of Chang	ie 🧼 8/5/202	2 11:30 PM		Downti	me Anticipated? 🥥	Yes	
Scheduled End Da	te			Amo	unt of Downtime	30min	
Date Close	ed 🥝				Roll-out Plan 🥝	Test SQL 02	
					Rollback Plan 🥝	Revert back to SQL 01	server.
Client Approval Neede	ed Yes						
Client Portal User #	1 Vaness	a Moran					
Client Portal User #	2						
Client Portal User #	3						
Client Approval Stati	is Pending) • Maran - 0/4/00/	22 10.10 414		act Modified Du	Vanagas Maran 0/4/0/	222 10:10 4M
Created b	y vaness	a Woran, 8/4/202	22 10.10 AM	L	Record Type	Client Change Degue	10.19 AW
					Record Type	Client Change Reques	st.



On the Approval Request screen, click Approve or Reject.

NextGen Enterprise Experier	nce 👻						
nextigen. success	i IITY			Search	Q,	Profile	Log Out
Home 0	Cases Assets	Knowledge	Change Requests	Known Issues	Services	Ideas	Chatter
Approval Request Change Request: CR3 « Back to Change Request: CR3	34950 1950						
Approve/Reject Approval R	Request						
CR Number Change Request Type	CR34950						
Owner	Change Request Queue						
Client Approval Status Comments	Pending					R	
		Approve	Reject Cancel				

If rejecting the change request, you must provide a rejection reason in the Comments box.

NextGe	n Enterprise Experier	nce 👻						
nextg	en. success commun	i IITY		Search	Q	Profile	Log Out	
	Home (Cases Assets	Knowledge	Change Requests	Known Issues	Services	Ideas	Chatter
Approv Change	al Request Request: CR	34950						
Approve/R	eject Approval F CR Number hange Request Type Owner	Request CR34950 Change Request Queu	e					
	Itent Approval Status Comments	Pending I reject this change r	equest. Please schedu	ule for following weekend at S	əpm on Saturday.		ĥ	
			Approve	Reject Cancel				



Change Request Tab - List Views

Change requests will display in multiple list views, depending on the status. When you first open the *Change Requests tab*, you will see your recently viewed change requests.

Recent Change Requests is not a sortable list view. This table shows you any change request that you recently viewed regardless of status. If you're searching for a particular change request, we recommend selecting a list view.

To ensure consistent collaboration between you and NextGen Healthcare, we recommend reviewing the *Client Pending Approval Change Requests* list view regularly. Change requests that are not responded to will remain pending.



List View Descriptions

Select a list view and click Go.

List View
All Client Change Requests
All change requests regardless of status.
Client Approved Change Requests
All approved change requests.
Client Pending Approval Change Requests
All pending approval change requests.
Client Rejected Change Requests
All rejected change requests.



Frequently Asked Questions

How will the designated client contact for a change request be identified?

If the change request results from a support case, it will be assigned to the case contact. If the change request does not result from a support case, it will be assigned to a designated Main Client Community User from your organization.

What happens to a change request that is not approved or rejected?

Change requests that are not responded to will remain pending. NextGen Healthcare recommends reviewing email notifications and the *Client Pending Approval Change Requests* list view in Success Community regularly.