

Before You Arrive: 10-Minute NextGen Practice Optimization Worksheet

A simple pre-UGM exercise to identify where your NextGen environment is helping—and where it is creating friction.

ALIGN PRIORITIES

CLARIFY OWNERSHIP

DEFINE “WORTH IT”

HOW TO USE THIS

Spend 5–10 minutes with 1–2 teammates. Don’t overthink the answers. Mark “Unsure” when ownership or data is unclear. Use the results to decide what questions you want answered in San Diego.

Prepared by Shared IT

What would make UGM worth it?

Start with the questions your team actually needs answered—not the agenda.

Top 1–2 challenges we need clarity on

Where do we feel the most operational pressure?

What would make this trip “worth it”?

What are we hoping to find?

☐ Ideas

☐ Validation

☐ Peer examples

☐ Vendors

☐ Solutions

THE 3 QUESTIONS WE WANT ANSWERED IN SAN DIEGO

1

2

3

Where is the friction today?

Rate the areas that affect daily operations. “Unsure” is useful data.

NextGen performance	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Templates / specialty content	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Reporting / data	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Interfaces / APIs	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Referral / fax intake	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Patient experience	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
System administration	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure
Security / compliance	☐ Working well	☐ Some friction	☐ Significant friction	☐ Unsure

Circle or discuss the two areas where fixing friction would create the biggest business impact.

Who owns what—and where does it break?

Unclear ownership is often the root cause of recurring NextGen problems.

Area	Owner	Clear?	Confidence	Where it breaks	What to learn at UGM
NextGen administration	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
IT / infrastructure	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
Interfaces / APIs	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
Cybersecurity / HIPAA	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
Revenue cycle	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
Data / reporting	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____
Workflow improvement	_____	☐ Y ☐ N ☐ ?	☐ H ☐ M ☐ L	_____	_____

Where is there the most overlap, confusion, or “someone else owns that”? _____

What deserves attention in the next 12 months?

Mark anything already planned, painful, or strategically important.

- | | |
|--|--|
| ☐ Reduce database / storage footprint | ☐ Automate referral / fax intake |
| ☐ Archive legacy data | ☐ Improve integrations / APIs |
| ☐ Prepare for hosting / cloud | ☐ Reduce IT / vendor spend |
| ☐ Redesign specialty workflows | ☐ Strengthen cybersecurity / compliance |
| ☐ Improve reporting / data access | ☐ Improve provider / staff usability |

Pick the top two

Which two priorities would produce the most measurable impact in the next 6–12 months?

Name the owner

Who needs to be involved for either priority to move from idea to action?

Turn the worksheet into a useful conversation

The point is not to score well. The point is to identify what deserves attention.

NEXT STEP

Use your top two issues to frame a 30-minute UGM conversation.

Shared IT has worked in the NextGen ecosystem for more than 20 years across specialty workflows, templates, integrations, APIs, conversions, infrastructure, data lifecycle, cybersecurity and operational improvement.

30-MINUTE NEXTGEN STRATEGY DISCUSSION

Bring this worksheet with you—or use it to frame a 30-minute conversation before or during UGM.