

NextGen Urology Workflow Optimization Checklist

A practical pre-UGM worksheet for urology leaders evaluating specialty workflows, usability, integration and operational friction.

SPECIALTY WORKFLOW

NEXTGEN OPTIMIZATION

UGM 26

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

Where is the urology workflow helping—or getting in the way?

Rate what providers and staff experience today.

Specialty documentation	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Procedure workflows	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Orders / results	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Medication workflows	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Referral intake	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Scheduling	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Interfaces / devices	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Reporting / analytics	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Provider usability	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Patient follow-up	☐ Working	☐ Mixed	☐ Painful	☐ Unsure

Where are workarounds hiding?

Check anything that happens outside the intended workflow.

- ☐ Workarounds outside NextGen
- ☐ Duplicate documentation
- ☐ Manual routing / task creation
- ☐ Template fields that do not fit
- ☐ Rekeying from external systems
- ☐ Referral intake delays
- ☐ Inconsistent provider workflows
- ☐ Results not reaching the right queue
- ☐ Spreadsheets / trackers
- ☐ Aging customizations

Provider burden

Where are providers adding clicks, duplicate documentation, or manual follow-up?

Staff burden

Where are staff using spreadsheets, inboxes, paper, shared folders or memory to keep work moving?

Questions worth taking to San Diego

Use these prompts to decide what you want to validate, learn or fix.

1. Are we using the specialty content and workflows available to us effectively?

2. Where have local customizations drifted from current practice needs?

3. Which urology workflows still require avoidable manual touches?

4. Are integrations, devices and interfaces supporting the workflow cleanly?

5. Where do providers experience unnecessary clicks or duplicate documentation?

6. What should we standardize before we customize again?

Bring the workflow you most want to improve

One real workflow is more useful than a generic product discussion.

THE ONE WORKFLOW WE WANT TO PRESSURE-TEST

Shared IT / Shared Med IT has deep NextGen specialty experience, including work that contributed to urology specialty content now distributed within the NextGen ecosystem. We also help practices deploy, optimize and extend specialty workflows rather than simply hand over templates.

30-MINUTE UROLOGY WORKFLOW REVIEW

No demo required. Bring the workflow, bottleneck or question you want to unpack.