

NextGen ENT & Allergy Workflow Optimization Checklist

A pre-UGM diagnostic for ENT and allergy practices evaluating repetitive treatment workflows, testing, immunotherapy, referrals and patient communication.

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 are repetitive specialty workflows consuming staff time?

Rate the areas where consistency and automation matter most.

ENT documentation	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Allergy testing	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Immunotherapy workflows	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Medication administration	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Recurring visits	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Referral intake	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Scheduling	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Test results	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Procedure documentation	☐ Working	☐ Mixed	☐ Painful	☐ Unsure
Patient communication	☐ Working	☐ Mixed	☐ Painful	☐ Unsure

Where are workarounds hiding?

Check anything that happens outside the intended workflow.

- ☐ Manual allergy / immunotherapy trackers
- ☐ Repetitive documentation
- ☐ Outside spreadsheets for recurring care
- ☐ Referral intake delays
- ☐ Testing results routed inconsistently
- ☐ Manual patient reminders
- ☐ Procedure workflows vary by provider
- ☐ Repeated data entry
- ☐ Tasks depend on individual staff
- ☐ Reporting requires manual cleanup

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 allergy testing and treatment workflows connected cleanly?

2. Where do recurring visits create avoidable documentation burden?

3. What work is being managed in spreadsheets or manual trackers?

4. Can referrals and incoming documents be routed more intelligently?

5. Are procedure and result workflows consistent across locations?

6. Which repetitive tasks could be automated while keeping clinical exceptions visible?

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 broad NextGen experience in ENT, allergy and other specialty environments, including workflow design, customization, interfaces and automation. The goal is to make NextGen support the specialty workflow rather than force the specialty to work around the system.

30-MINUTE ENT / ALLERGY WORKFLOW REVIEW

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