

Where in the **UGM** Is **Dr. San Diego?**

Your NextGen UGM 2026 investigation starts here.



Free conference prep resources from Shared IT.

CASE 01 / MISSION BRIEFING

Before You Arrive: 10-Minute Alignment

Recruit 1-2 teammates. Identify the friction, the owners, and the result that would make UGM worth it.

THREE CLUES TO UNCOVER BEFORE DEPARTURE

01

IDENTIFY PRESSURE
Where is your practice feeling the most friction: clinical workflows, revenue cycle, staffing, data, or IT?

02

CLARIFY OWNERSHIP
Who owns optimization, upgrades, security, integrations, and vendor follow-through?

03

DEFINE SUCCESS
What would make UGM worth the investment when you return to your practice?

THE CASE BRIEFING / WHAT WOULD MAKE UGM WORTH IT?

Our top 1-2 practice challenges

Where our NextGen environment creates the most friction

What a successful conference would help us decide



FIELD INSTRUCTIONS

Mark anything you cannot answer as "Unsure." Use the next pages to pick sessions, meet peers, and capture discoveries.

CASE 02 / FOLLOW THE CLUES

Choose the Right Sessions

Use these prompts to decide where to spend your time. Confirm session titles and times against the final agenda.

01

AI & CLINICAL WORKFLOWS

Which repetitive tasks could be reduced without disrupting care or adding new risks?

☐ Clear ☐ Somewhat clear ☐ Not clear

One workflow we want to improve:

.....

02

REVENUE CYCLE & PRACTICE PERFORMANCE

Where do documentation, claims, denials, or collections slow us down?

☐ Clear ☐ Somewhat clear ☐ Not clear

One metric we want to improve:

.....

03

ANALYTICS & INTEROPERABILITY

Can our teams trust the data and move information reliably between systems?

☐ Clear ☐ Somewhat clear ☐ Not clear

One reporting or integration gap:

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04

CLOUD, UPGRADES & PLATFORM INNOVATION

What should we optimize now, and what needs a longer-term technology plan?

☐ Clear ☐ Somewhat clear ☐ Not clear

One platform question to investigate:

.....

CASE 03 / BUILD YOUR CASE FILE

Your UGM Game Plan

Track the questions, sessions, and people most likely to help solve your practice challenges.

FIVE LEADS WORTH INVESTIGATING

- 1

AI & AUTOMATION
What repetitive task could we safely simplify?
Session / person to ask: _____
- 2

CLINICAL WORKFLOWS
Where are providers losing time in NextGen?
Session / person to ask: _____
- 3

REVENUE CYCLE
Which bottleneck is costing us time or revenue?
Session / person to ask: _____
- 4

DATA & REPORTING
What information do we need but struggle to access?
Session / person to ask: _____
- 5

SYSTEM PERFORMANCE
What would make our environment more reliable?
Session / person to ask: _____

TOP THREE SESSIONS / YOUR ITINERARY

- 01

Session: _____
One thing to learn: _____

When: _____
- 02

Session: _____
One thing to learn: _____

When: _____
- 03

Session: _____
One thing to learn: _____

When: _____

PEER INTEL: One question to ask another NextGen user:

CASE 04 / FIELD INVESTIGATION

Where Will Your Next Big Idea Come From?

Your mission: discover three ideas worth bringing home. Use this page during sessions, demos, and conversations.

SAN DIEGO DISCOVERY HUNT / CHECK OFF YOUR MISSIONS

- ☐ Meet someone from a practice similar to yours
- ☐ Discover a NextGen feature your team is not using
- ☐ Ask a peer how they solved a problem you share
- ☐ Attend a hands-on demonstration or training session
- ☐ Find one way to simplify a clinical or administrative workflow
- ☐ Learn one way to save staff time or reduce unnecessary cost



EVIDENCE COLLECTED / THREE DISCOVERIES

BEST IDEA I DISCOVERED

What was it, and where did I find it?

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.....

BEST CONVERSATION I HAD

Who did I meet, and what did I learn?

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.....

FIRST THING I WILL DO AT HOME

What action can I take in the next 30 days?

.....

.....

BONUS MISSION

Share one discovery with your team and identify one unanswered question.

CASE 05 / SOLVE THE NEXT CHALLENGE

Turn Your Discoveries Into a Plan

Your conference clues are only the beginning. Shared IT can help turn them into practical next steps.

COMPLIMENTARY NEXTGEN UGM ATTENDEE OFFER

Shared IT is offering a Healthcare IT & Compliance Workshop to help identify opportunities, evaluate risks, and prioritize practical next steps.

01

Compliance & Cybersecurity Heatmap

Review your current security and compliance posture, identify gaps, and clarify areas needing attention.

02

Cost-Benefit Roadmap

Explore good, better, and best technology options aligned with your practice's budget, staffing, and 2027 priorities.

03

Savings & Investment Opportunities

Identify ways to optimize technology spending, including unnecessary costs and legacy systems worth evaluating.

STANDARD ENGAGEMENT VALUE

\$4,500

COMPLIMENTARY FOR UGM ATTENDEES

Request your workshop at sharedit.com

HOW IT WORKS

2-3 short, 30-minute sessions over 1-2 weeks with IT, operations, compliance, and leadership stakeholders. No sales pitch, just practical insights.