



Change Requests Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

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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.

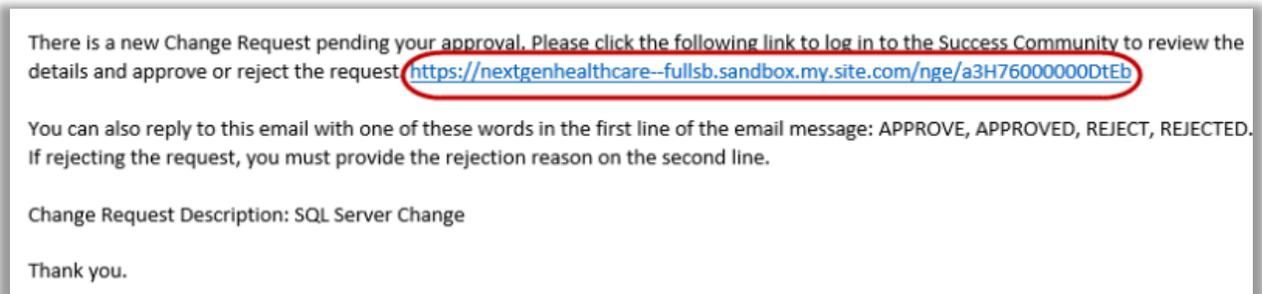
Approving Change Requests

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.

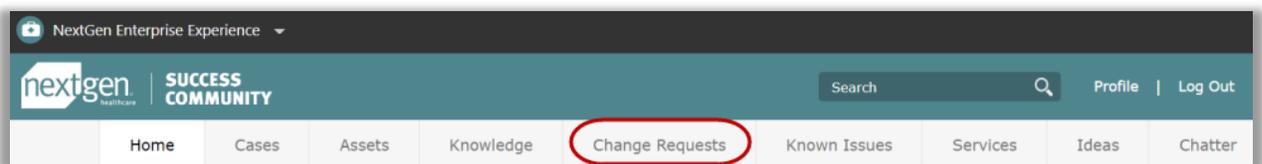
There are two ways to approve a pending change request.

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.

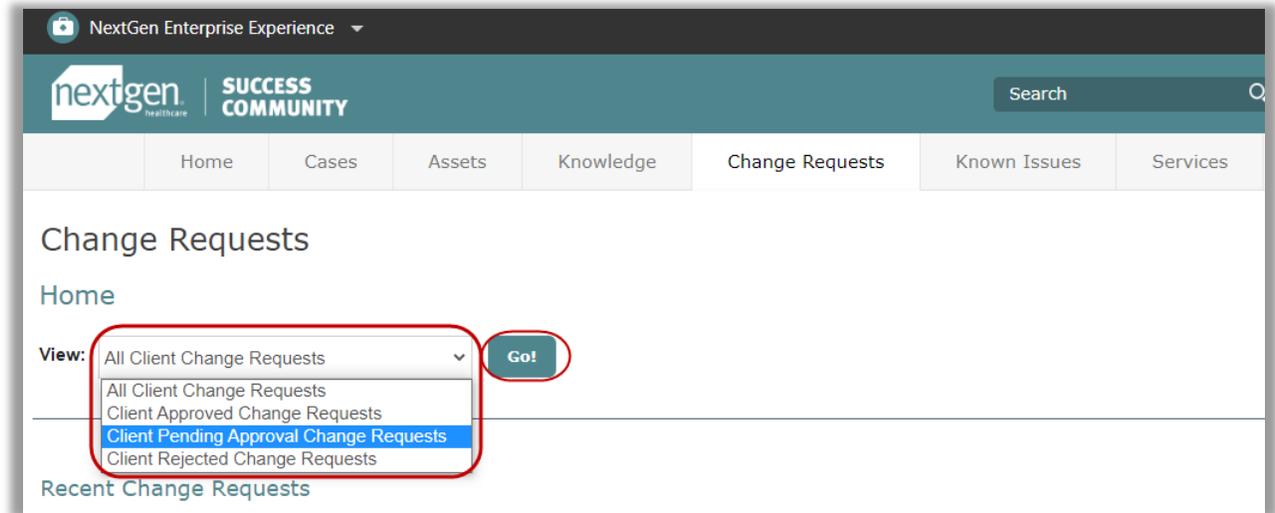


2. **Success Community:** Click on the *Change Requests tab* from the Success Community home screen.

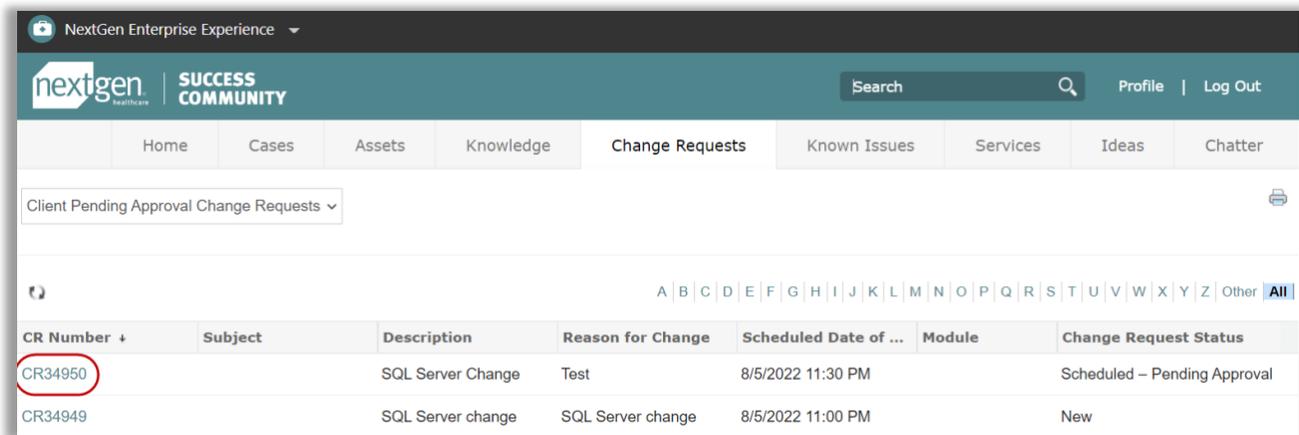




Under *View*, choose *Client Pending Approval Change Requests* and click **Go**.



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





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 Experience

nextgen healthcare | SUCCESS COMMUNITY

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Change Request

CR34950

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Change Request Detail

Client Approval History

Action	Date	Status	Comments	Overall Status
Step: Client Approval				
Approve / Reject	08/4/2022 10:19 AM	Pending by: Vanessa Moran		Pending
	08/4/2022 10:19 AM	Submitted by: Vanessa Moran	Approval request.	

Information

CR Number	CR34950	Owner	Change Request Queue [Change]
Change Request Status	Scheduled – Pending Approval	Environment	Production
Account	AAA Comprehensive Healthcare	Other Environment	
Category		Module	
Domain		Other Module	

Change Request Details

Description	SQL Server Change
Reason for Change	Test
Name of Server Affected	SQL 02
Impact	

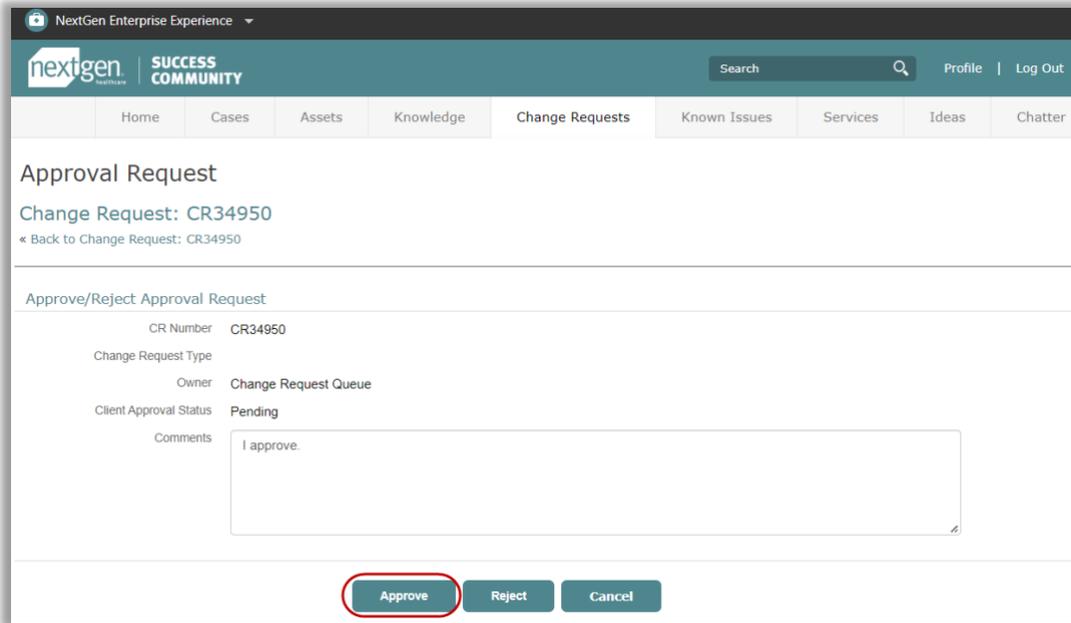
Scheduling Info

Scheduled Date of Change	8/5/2022 11:30 PM	Downtime Anticipated?	Yes
Scheduled End Date		Amount of Downtime	30min
Date Closed		Roll-out Plan	Test SQL 02
		Rollback Plan	Revert back to SQL 01 server.

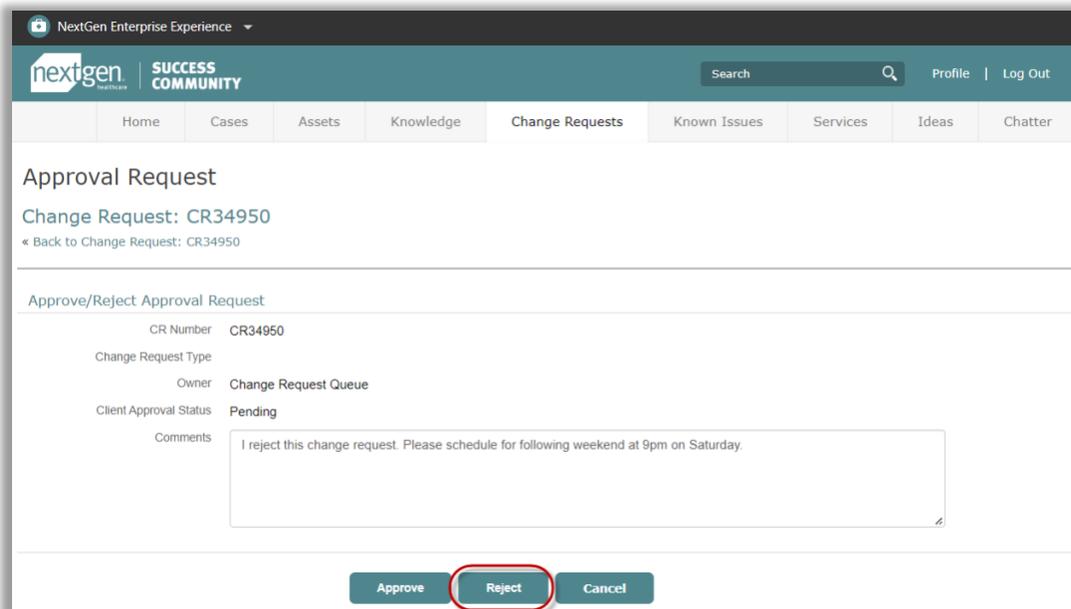
Approval Details

Client Approval Needed	Yes		
Client Portal User # 1	Vanessa Moran		
Client Portal User # 2			
Client Portal User # 3			
Client Approval Status	Pending		
Created By	Vanessa Moran, 8/4/2022 10:18 AM	Last Modified By	Vanessa Moran, 8/4/2022 10:19 AM
		Record Type	Client Change Request

On the *Approval Request* screen, click **Approve** or **Reject**.



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



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.