Known Issues Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

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Recommended prerequisite reading: Case Management Best Practices Guide.

Tips on Known Issues

Simulation Videos for Known Issues
See how Known Issues work by watching our quick simulation videos. Click below to watch:

- Searching Known Issues (HTML video, 1:27)
- Linking to a Known Issue (HTML video, 1:24)
- Printing and Exporting Known Issues (HTML video, 1:11)

Anatomy of a Known Issue

![Known Issue Anatomy](image-url)
1. **Known Issue Number** – This is the unique identifier for this known issue. This number is searchable in global search, used as a reference when connecting with support on any related cases, and listed in product releases and hot fixes.

2. **This Known Issue Affects Me Button** – Click this button to link to the known issue.

3. **Known Issue Detail**
   a) **KI Number** – The known issue number as previously described.
   b) **Severity** – Informs NextGen Healthcare of how critical your case is to your organization.
   c) **Known Issue Status** – Lists the status of the known issue. Statuses included New, In Progress, Scheduled for Future Release, Not Reproducible, Closed, and Billable Work.
   d) **Created Date** – Lists the date and time the known issue was created.
   e) **Type and Sub Type** – Identifies the known issue as a defect, training issue, or even possibly a duplicate of another known issue.
   f) **Module** – Identifies which module within a product where this known issue has been found. This is tied to the category field.
   g) **Category** – Identifies in which product this known issue has been found.
   h) **Found in Version** – This is the version in which the known was first reported as being found. It may or may not be the origin of the known issue.
   i) **Planned Release Version** – This is the general release version in which the known issue is expected to be fixed.
   j) **Patch Available?** – Displays if a fix for this known issue has been released in a patch (product release in between general releases).
   k) **Target Patch Release Date** – Displays the estimated patch release date.

4. **Details** – A detailed explanation to help clients understand the known issue and assess if they are experiencing the same issue.

5. **Resolution Details** – Particulars to assist clients in addressing the known issue. This includes recommended workarounds to maintain productivity until a fix is produced or resolution information on how to fix permanently.

6. **Patch Details** – If this known issue was resolved in a previous patch, details could be listed here.
Search Known Issues with Global Search

You can search for any known issue using the global search bar at the top of the Success Community. Type in your search terms or Known Issue number (KI Number) and press enter.

If there are any results that include your search terms, they will appear on the search results page. To only see known issues, select the known issues record type from the left menu.

You can filter your results further using the filters located next to the words Known Issues. You may have to expand filters by clicking on show filters.

You can use filters to find known issues related to a specific product (category), product version (found in version), planned release version, module, or any combination of these.

Important Note: While Found in Version and Planned Release Version have the icons, these are free text fields so you must type in a search term instead of choosing from a picklist.

Select Apply Filters to see your search results. Learn more about global search by watching the Using the Global Search simulation video.
Search for Known Issues in the Known Issues Tab

For step-by-step instructions on searching known issues, we recommend checking out this simulation video: Searching Known Issues (HTML video, 1:27)

Searching Known Issues with Filters
When you first open the Known Issues tab, you will see the following sorting fields:

- Search Issue by Keyword
- Category
- Module
- Status
- Patch Available
- Found in Version
- Target Patch Release Date

Sorting Known Issues
The columns for Known Issues are sortable. Double-click on a column header to sort the column by ascending and descending.
Exporting / Printing Known Issues

On the Known Issues tab, after you selected the filters of your choice, click on the Print button. A print preview of the Known Issues opens. You can either print from this view or copy/paste the information to an Excel® spreadsheet.

<table>
<thead>
<tr>
<th>Known Issue ID</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>KN0101</td>
<td>Fix for System X1 add Patient data in the SOAP and create templates.</td>
</tr>
<tr>
<td>KN0202</td>
<td>Fix for System X2 to support Windows 10 machines.</td>
</tr>
<tr>
<td>KN0303</td>
<td>Fix for System X3 does not update the order.</td>
</tr>
</tbody>
</table>

Linking Known Issues

There are two ways you can be linked to a Known Issue:

**NextGen Healthcare Support Links You to a Known Issue**

The first and most common is when the NextGen Healthcare Support case owner identifies that your situation is related to a known issue and links your case to the known issue.

You will be able to see the known issue number on the case under case details.

When you receive a case update that you've been linked to a known issue, you can accept or reject the proposed known issue. Accept the known issue and your case will stay in a linked to known issue status until a fix has been released. Reject, and the case goes to pending analyst response. Read more in the Case Management Best Practices guide.
You Link to a Known Issue

If your search for known issues identifies one that you’re experiencing, you can link to that known issue by clicking on the *This Known Issue Affects Me* green button.

When you link to a known issue, a case will be created for you automatically with the status of *linked to known issue* status until a fix has been released.
Viewing Cases Linked to Known Issues

You can see which cases you have that are linked to a known issue via the Cases tab. There are two list views to choose from: Closed Cases Linked to a Known Issue and Open Cases Linked to a Known Issue.

Frequently Asked Questions

Is it correct to say that the list of Known Issues displayed for any single version release will be incomplete because issues found in previous versions won’t display, but are still present?

The results will depend on how you are searching, but typically when you look at a single release version, you will be seeing all the items fixed in that version, but with a code change.

How do you change a version in the Known Issues?

Only the NextGen Healthcare Support team would change the version of a Known Issue.

The Known Issue doesn’t have the This Known Issue Affects Me button. Why not?

There are three possible reasons the button may be missing:

1. You are already linked to the Known Issue in another case for your account. Search for the Known Issue in global search and filter your results by cases to see if there is already a case open with this Known Issue.

2. The Known Issue is an “internal only” Known Issue. These are listed as informational only and are not available for linking. Submit a case if you feel that this Known Issue truly affects your account.

3. You are using Internet Explorer® with compatibility settings. This isn’t a recommended browser and has some reported usability limitations.