



Getting Started Guide

NextGen Healthcare Success Community

www.community.nextgen.com

v.10

Updated 12.30.2020



LOG IN	4
PREVIOUS LOGIN CREDENTIALS	4
LOGGING IN FOR THE FIRST TIME	4
STEP 1: RECEIVING YOUR LOGIN CREDENTIALS VIA EMAIL	4
STEP 2: SETTING YOUR PASSWORD	5
PASSWORD RESETS	5
SUCCESS COMMUNITY EXPERIENCES	7
DIRECTING YOU TO YOUR EXPERIENCE	8
WHAT IS IN EACH EXPERIENCE	8
CHANGING YOUR EXPERIENCE	8
USER PROFILES, PERMISSIONS AND ACCESS	10
USER PROFILES AND PERMISSIONS	10
ADDING AND REMOVING MAIN CLIENT COMMUNITY USERS (MAIN CONTACTS)	11
ADDING, REMOVING, AND MODIFYING USERS	11
ADD A NEW USER	11
MODIFYING / REMOVING AN EXISTING USER	13
INACTIVE USERS	13
CONTACT ROLES	14
ACCESS TO APPLICATIONS	15
CHILD ACCOUNTS	15
TIPS ON ACCESSING THE SUCCESS COMMUNITY	15
HOW TO ALLOWLIST EMAIL ADDRESSES	15
OUTLOOK 2003 - 2007	15
OUTLOOK 2010 - 2013	15
SUPPORTED BROWSERS	16
BANDWIDTH REQUIREMENTS FOR THE SUCCESS COMMUNITY	16
SECURITY OVERVIEW FOR SUCCESS COMMUNITY AND SALESFORCE	16
SECURITY REQUIREMENTS FOR ACCESSING THE SUCCESS COMMUNITY	17
MOBILE ACCESS	17
USE REMEMBER ME	17
SESSION TIME OUT	18
GETTING STARTED - FREQUENTLY ASKED QUESTIONS	19
HOW MANY SUCCESS COMMUNITY USERS CAN AN ACCOUNT HAVE?	19
OUR MAIN CONTACT HAS LEFT. HOW DO I HAVE MYSELF PROMOTED?	19
CAN WE ADD A USER TO ONLY RECEIVE SPECIFIC UPDATES?	19
DO USERS NEED UNIQUE LOGIN CREDENTIALS TO ACCESS THE SUCCESS COMMUNITY?	19



I COMPLETED A RESET PASSWORD, BUT I DID NOT RECEIVE AN EMAIL.	19
CAN A CHILD ACCOUNT VIEW PARENT ACCOUNT INFORMATION?	20
CAN I CHANGE MY USERNAME ON THE SUCCESS COMMUNITY?	20
HOW CAN I UPDATE OUR MAIN PHONE NUMBER?	20



Log In

The following explains how to log in to the Success Community for the first time. This is also available in our [Logging On for the First Time](#) simulation video.

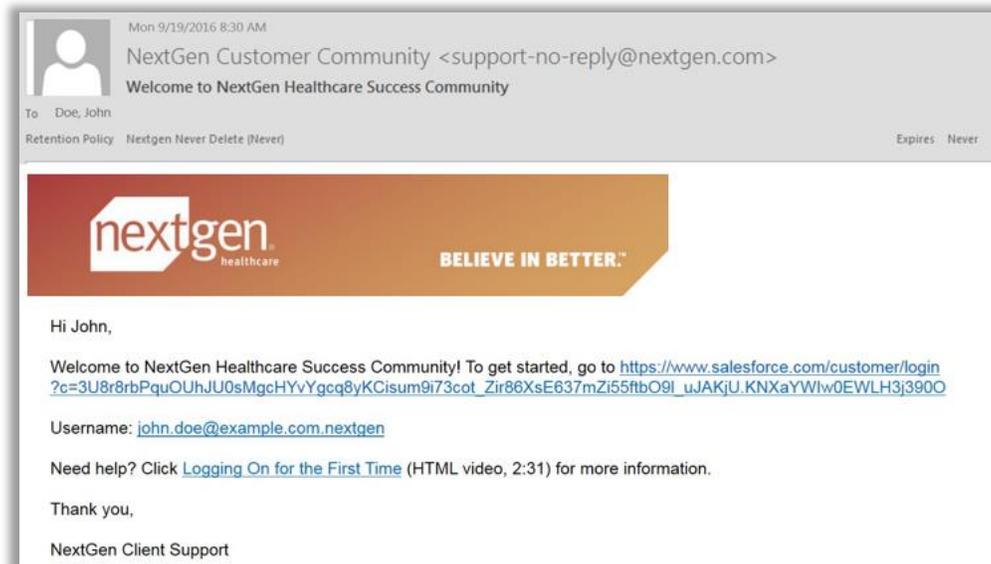
Previous Login Credentials

Login credentials for previous support systems, or other platforms, will not work in the Success Community. A new username and a password reset email will be sent to clients for the Success Community.

Logging in for the First Time

STEP 1: RECEIVING YOUR LOGIN CREDENTIALS VIA EMAIL

You will receive an email similar to the email below which will contain a hyperlink to help you set up your Success Community password and will also include your new Success Community username.



Your username will follow this format: **email address plus .nextgen** on the end. For example:

Email Address: john.doe@example.com

Username: john.doe@example.com.nextgen

This email will come from Support-No-Reply@nextgen.com. Please be sure to “allowlist” this email address so the email does not go to your spam folder. See [how to allowlist here](#).



STEP 2: SETTING YOUR PASSWORD

When you click on the link, you will be taken to the Success Community reset password screen.

Your password must have at least eight characters, consisting of at least 8 characters with one alpha, one numeric, and one special character. When your password fulfills each requirement, the circle next to the requirement will turn green.

Enter your password and then enter it again under *confirm new password*. When you've entered matching passwords that fulfill the requirements, select the change password button. You will now enter the Success Community.

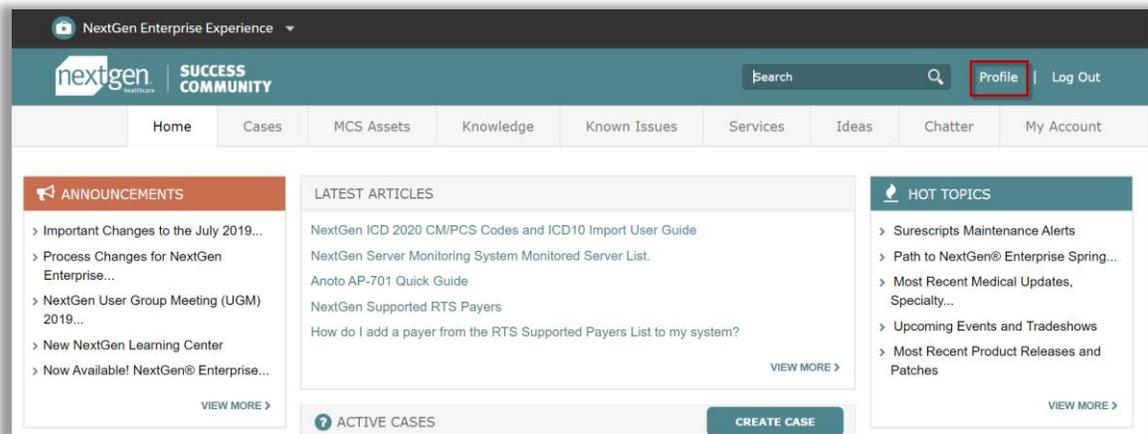
If you do not receive the email and you have allowlisted @nextgen.com, email SuccessCommunity@nextgen.com.

Password Resets

There are three ways to reset a password.

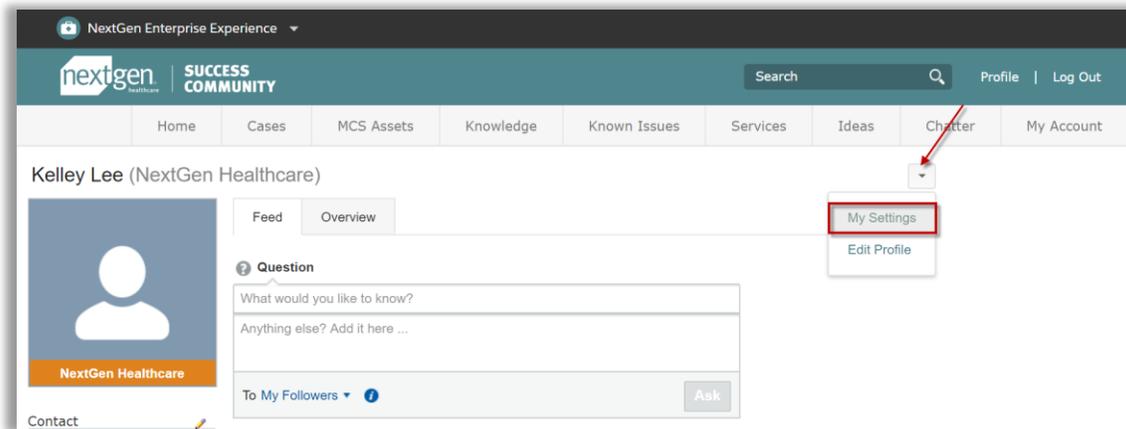
1. If you know your current password, you can reset your password from your profile in the Success Community.

From the Success Community homepage, click **Profile**.

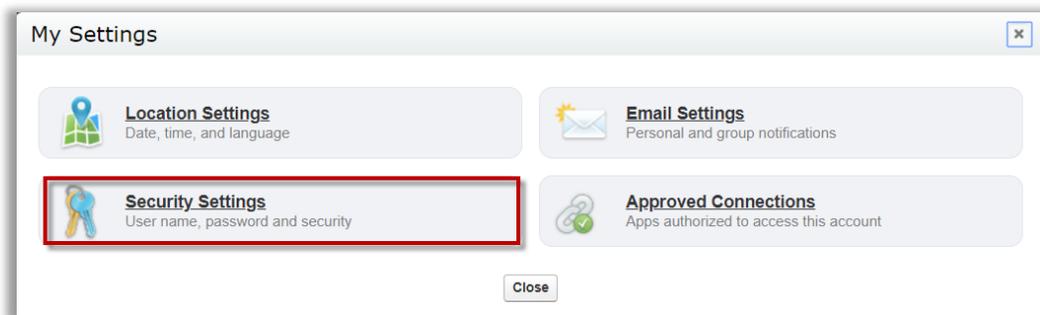




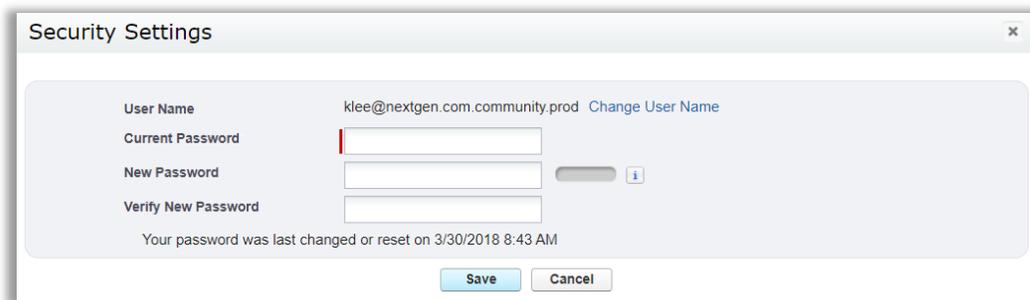
Click the **dropdown arrow** in the upper right corner of your profile and click **My Settings**.



Click **Security Settings**.



You will be prompted to enter your current password and your new password.



Verify your new password and click **Save**.



2. If you do not know your current password, you can use the forgot password option on the Success Community login screen.

Click on **Forgot Your Password**.

The screenshot shows the Success Community login interface. At the top left is the NextGen Healthcare logo, and at the top right is the text 'SUCCESS COMMUNITY'. Below the logo is a 'Username' field with a placeholder text 'Please enter your username as [your email address].nextgen'. Below that is a 'Password' field. A teal 'Login' button is positioned below the password field. To the left of the button is a 'Remember Me' checkbox. Below the login button is a red circle highlighting the 'Forgot Your Password?' link. To the right of the login fields, there is a section for 'Supported browsers' with icons for Mozilla Firefox, Google Chrome, and Apple Safari. Below that, it says 'Need help logging in? Give us a call at 855-657-4373'.

You will be prompted to enter your username. The system will not alert you if the username you entered is incorrect.

The screenshot shows the 'Forgot Your Password' screen. At the top left is the NextGen Healthcare logo, and at the top right is the text 'SUCCESS COMMUNITY'. Below the logo is the text 'Forgot Your Password'. Below that is the instruction 'To reset your password, enter your username.' followed by a 'Username' label and an empty text input field. At the bottom of the form are two buttons: a light blue 'Cancel' button and a teal 'Submit' button.

Click **Submit** and you should receive an email to reset your password. [What if I don't receive an email?](#)

3. A Main Client Community User (Main Contact) easily can reset passwords for users at their practice directly from the Success Community **My Account Tab**.

Success Community Experiences

The Success Community is comprised of four “experiences” – NextGen Enterprise, Dental, NextGen Office, and Optimization. These experiences enable you to see only the information relevant to you based on the solutions your organization has purchased.



Important Note: If you are a NextGen Enterprise, Dental, or NextGen Office client, you will have access to those three experiences. If you have *only* purchased NextGen Mobile Solutions, NextGen Connected Health Solutions, NextGen Population Health, or the NextGen Patient Experience Platform, you will only have access to the Optimization Experience.

DIRECTING YOU TO YOUR EXPERIENCE

When you log into the Success Community, you will be greeted with the following screen. The system will automatically direct you to the appropriate Success Community experience based on the solutions your organization has purchased.



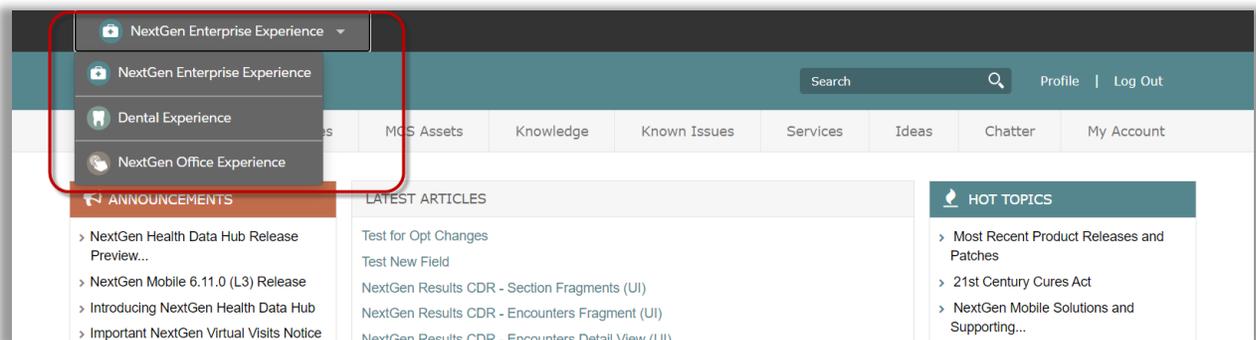
WHAT IS IN EACH EXPERIENCE

Each experience is complete with information, articles and more specific to that experience. For example, if you are in the NextGen Office experience, the knowledge, ideas, chatter, known issues and services will be specific to NextGen Office.

Cases are the exception. You can manage all of your cases from any experience; however, if you need to open a new case, you must do that from the appropriate experience to see the applicable case categories, recommend knowledge articles, known issues and questions.

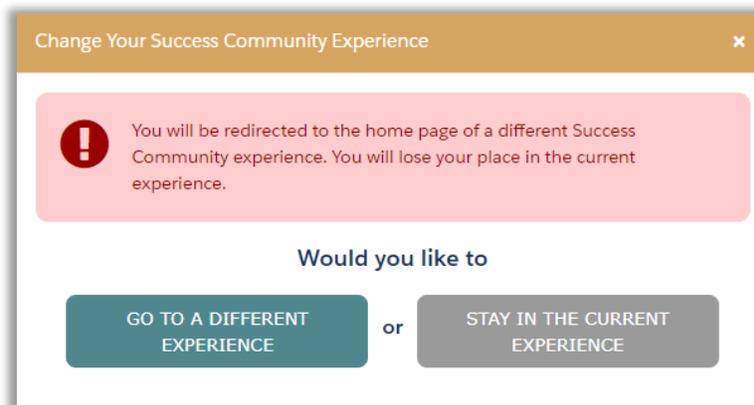
CHANGING YOUR EXPERIENCE

If at any point, you need to change your experience, click on the Success Community experience drop down list at the top left of the community and choose a different experience.





You will be prompted to confirm your choice by the system. Regardless of where you are in the community, you will be redirected to the home page of your new experience.



If you choose to toggle out of your designated experience, you will be automatically redirected back to the correct experience upon your next login.



User Profiles, Permissions and Access

User Profiles and Permissions

Users at your practice may choose from numerous Success Community profiles. Ensure that your users have the Success Community Permissions they need to get the most out of the community. Use the chart below to determine which user profile to assign to the Success Community members at your practice.

Success Community Tabs	Success Community Profiles				Optimization Only Clients ¹	
	Main Client Community User	Client Community User	Knowledge Community User	Read-Only Community User	Optimization Only Main Community User	Optimization Only Community User
MY ACCOUNT Manage users, reset user passwords, and manage server information.	X				X	
CASES View cases and case history. Submit and manage cases.	X	X		X	X	X
MCS ASSETS View assets, the channel report tool and cases purchased.	X ²	X ²	X ²	X ²	X ²	X ²
KNOWN ISSUES View known issues. Link to known issues.	X	X	X	X	X	X
KNOWLEDGE Search and view educational articles.	X	X	X	X	X	X
IDEAS View, submit, and comment on ideas.	X	X	X	X	X	X
TRAINING Search, view, and register for courses, focus groups, and webinars.	X	X	X	X	X	X
CHATTER Chat, collaborate, and get updates. Join or create chatter groups.	X	X	X	X	X	X

1. Clients who have only purchased NextGen Mobile Solutions, NextGen Connected Health Solutions, NextGen Population Health Solutions, or the NextGen Patient Experience Platform.
2. Only available to clients who have purchased NextGen Connected Health Solutions or are hosted by NextGen Managed Cloud Services (MCS).



Adding and Removing Main Client Community Users (Main Contacts)

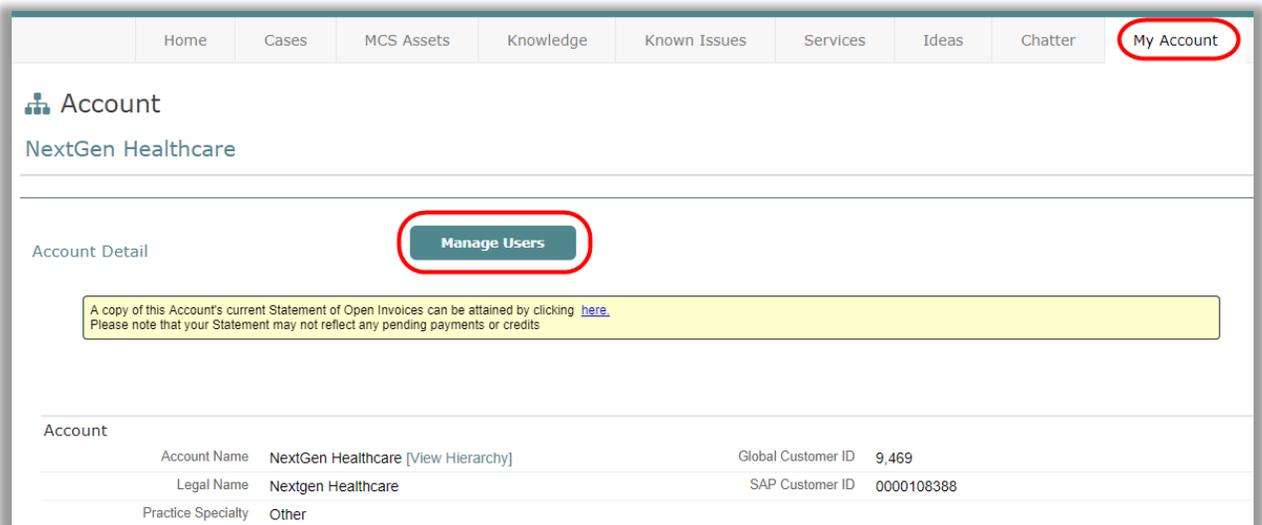
Unlike other community user profiles, a person can only be granted the Main Client Community User profile (also referred to as Main Contact) by contacting our Support Team.

To add or remove a main contact, an existing main contact can submit a case in the Success Community with the category “Community” or by calling our support line at 855-657-4373.

Adding, Removing, and Modifying Users

Designated Main Client Community Users at your organization can add, modify, or remove other users.

1. A Main Client Community User will log into the Success Community
2. Click on the **My Account** tab
3. Click on **Manage Users**



ADD A NEW USER

NextGen Office Important Note: To create a new Success Community user, you must create a user directly in the NextGen Office product. A Success Community profile will be automatically created for that user with the NextGen Client Community User profile permission.



All other clients, please follow these instructions.

1. Click on the blue **New User** button.

Manage Users

Active Users

New User

First Name	Last Name	Email Address	Username	Profile	Action
------------	-----------	---------------	----------	---------	--------

2. Complete the new user form and click **Save**.

New User

Back to List

Save Cancel

First Name

Last Name

Email

Access to Applications

Available	Selected
ICD NG Share NG Store	

Preferred Method of Contact: Email

Phone

No Longer at Account

Profile Permission: NextGen Client Community User

Contact's Roles

Available	Chosen
Accounting Receiver Clinician Receiver IT Receiver License Key Receiver	

When you activate a user, he or she will receive a [log in email](#).



MODIFYING / REMOVING AN EXISTING USER

Applicable to all clients

The screenshot shows the 'Manage Users' interface. At the top, there is a search bar highlighted with a red box. Below it, the 'Active Users' section contains a 'New User' button and a table of users. The table has columns for First Name, Last Name, Email Address, Username, Profile, and Action. Three users are listed: Amanda Heidemann, Andrew Penney, and Chyrece Ferry. In the Action column for each user, the 'Edit', 'Reset Password', and 'Deactivate' buttons are highlighted with red boxes.

First Name ▲	Last Name	Email Address	Username	Profile	Action
Amanda	Heidemann	aheidemann@nextgen.com.test	aheidemann@nextgen.com.community.fullsb	NextGen Main Client Read Only Community User	Edit Reset Password Deactivate
Andrew	Penney	apenney@nextgen.com.test	apenney@nextgen.com.community.fullsb	NextGen Main Client Read Only Community User	Edit Reset Password Deactivate
Chyrece	Ferry	cferry@nextgen.com.test	cferry@nextgen.com.community.prod.fullsb	NextGen Main Client Read Only Community User	Edit Reset Password Deactivate

On the **Manage Users** page, type the name of the user you are trying to modify in the search bar and press enter on your keyboard. You can also select next on the screen until you locate the user you are trying to modify. Once you have located the person of interest, you can take three actions.

1. Click **Edit** to modify the user's information.
 - a. **Important Note:** NextGen Office users can only change profile permission and contact role in the Success Community. All other changes must be made directly in the NextGen Office application.
2. Click **Reset Password** to trigger a password reset. The user will receive an email with a link to reset their password.
3. Click **Deactivate** to completely revoke a user's Success Community access. If you deactivate a user, they will move to the inactive list.
 - a. **Important Note:** Deactivating a user only revokes their Success Community access. It does not remove them from their product or our contact records.

When you change the email of a user, he or she will receive an email confirmation.

INACTIVE USERS

Inactive users are people who we have in our system as being associated with your account who do not have access to the Success Community.

Before creating a new user, confirm that the user isn't already in the inactive users list.

Inactive Users			
First Name▲	Last Name	Email Address	Action
	Ozias		Edit Activate
	Test for release		Edit Activate
	Jonas	ljones2@forefrontcorp.com.test	Edit Activate
Adam	Baraka	abaraka@nextgen.com.test	Edit Activate
Adam	Steinberg	asteinberg@rcm.nextgen.com.test	Edit Activate

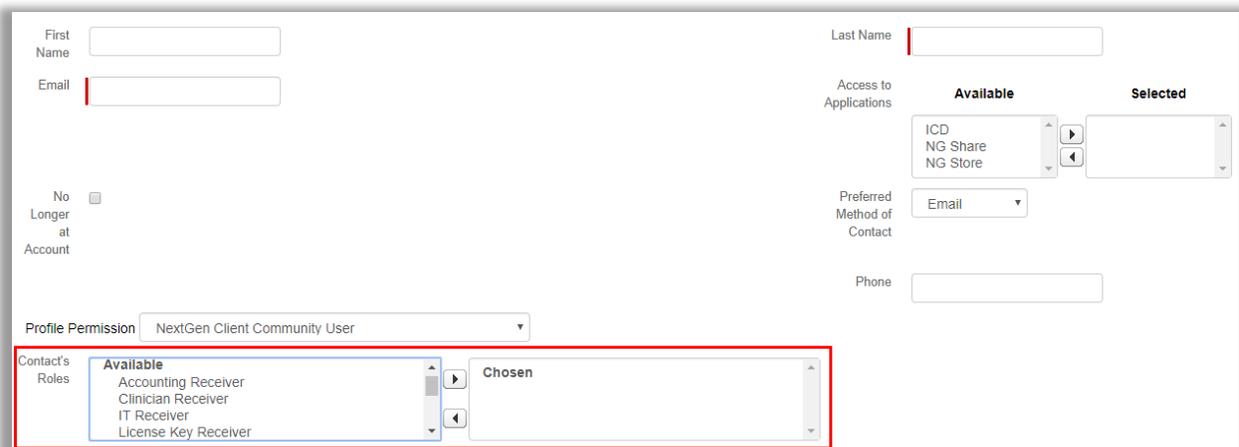
1 - 5 of 1220 **Next ▶** Page 1 of 244

1. To activate an inactive user, locate the user by either typing their name in the search bar or clicking next until you locate the user.
2. Click **Edit** to update the user’s name and email address.
3. Click **Activate** to update the user’s name, email address, Success Community profile permission and contact role. When you select save, this user will be granted Success Community access.

When you activate a user, he or she will receive a [log in email](#).

Contact Roles

We welcome all members of your organization. You have the option to assign a contact role to the users from your organization so that we can share the right information with the right people.



The form displays user details and configuration options. A red box highlights the 'Contact's Roles' section, which includes an 'Available' list (Accounting Receiver, Clinician Receiver, IT Receiver, License Key Receiver) and a 'Chosen' list. Other visible fields include First Name, Last Name, Email, Profile Permission (NextGen Client Community User), and a 'Preferred Method of Contact' dropdown set to 'Email'.

Choose from:

- **Accounting Receiver** – Contact who would handle any billing queries and questions.
- **Clinician Receiver** – Medical professionals at your organization.
- **IT Receiver** – Contacts who are technical professionals at your organization.
- **License Key Receiver** – Contacts who would receive keys for any new product licenses.
- **NG Product Admin Receiver** – Non-clinical staff such as front office.
- **Outage Notification Receiver** – Contacts who should be notified if there is an outage specific to your organization



- **Purchasing Decision Maker** – Contact who has authority to sign contracts for your organization
- **Purchasing Influencer** – Contact who is part of the purchasing process for your organization
- **Security Reviewer** – Contacts who should be notified if we need to discuss security information for your organization
- **Super User** – Contacts who are very knowledgeable on a product (i.e. administrator) for your organization

Access to Applications

Only Applicable to NextGen Enterprise clients

Once a user has been added to the Success Community, they can be granted access to other NextGen® Healthcare applications including ICD-10 and NextGen® Share.

Once granted, links to these applications will appear on the home page of the Success Community. There is no additional login required. Access is provided by single sign-on.

See how to add these applications to a user's profile with our simulation video: [Updating a Success Community User](#).

Child Accounts

Only applicable to resellers

To add, remove, or modify access for users of child accounts, a main contact at the parent account must open a support case with the product category "Community." (Not applicable to all clients.)

Tips on Accessing the Success Community

How to Allowlist Email Addresses

OUTLOOK 2003 - 2007

1. Open a message from the desired sender
2. Go to the Actions option in the top toolbar
3. Select Junk E-mail from the drop-down menu
4. Select the Add Sender to Safe Senders List option

OUTLOOK 2010 - 2013

1. Open Microsoft Outlook 2010 - 2013
2. In the home tab, click the Junk drop-down menu
3. Click Junk Email Option
4. Navigate to the Safe Recipients tab
5. Click the Add button
6. Type in the email address or domain you want to allowlist, then click Okay



Supported Browsers

The Success Community supports the use of Google Chrome, Mozilla Firefox, and Apple Safari browsers.

Using Internet Explorer is not recommended as there have been reported limitations with the use of the browser. You may need to change your compatibility settings, which may affect other programs and websites used at your organization.

Bandwidth Requirements for the Success Community

The Success Community is part of the Salesforce Platform. Salesforce is designed to use as little bandwidth as possible, so that the site performs adequately over high-speed, dial-up, and wireless Internet connections. You can [read more on specific requirements from Salesforce](#).

Security Overview for Success Community and Salesforce

NextGen Healthcare utilizes Service Cloud by Salesforce as the underlying platform for the Success Community. Service Cloud is a SAAS offering hosted by Salesforce within their colocation facility. Salesforce understands their clients' demands and steps are taken to protect the data entrusted to them.

In order to meet increasingly stringent client requirements, Salesforce has taken the following steps to help ensure the protection of data within this service:

- All data within Salesforce is encrypted at rest using AES (Advanced Encryption Standard)
- Connections to Salesforce are made with SSL
- Data stored within the application is only accessible to authorized NextGen personnel
- 24-hour physical security including foot patrol and perimeter inspections
- Biometric scanning for physical access
- Video surveillance
- N+1 power and cooling systems

In addition to the controls Salesforce has in place, NextGen Healthcare follows a robust set of policies and procedures when utilizing any cloud-based application:

- All vendors are thoroughly screened prior to use
- Access to data housed within these services is granted based on job duties and responsibilities and must be approved by an appropriate manager
- Access to cloud-based services is reviewed at a minimum quarterly in addition to new hire, termination, and job change procedures
- All employees are required to sign a Code of Conduct and Acceptable Use Policy in addition to completing annual training for the handling of sensitive information, breach notification and HIPAA guidelines
- Policies and Procedures are reviewed annually as part of our SOC 2 Type II effort



Security Requirements for Accessing the Success Community

As of March 10, 2018, to access the Success Community, users must leverage a Transport Layer Security (TLS) 1.1 security protocol. We made this change to help maintain the highest security standards and promote the safety of your data, as well as to align with industry-wide best practices.

TLS ensures that a connection to a remote endpoint arrives at the intended destination after encryption and endpoint identity verification. Salesforce, the underlying platform for the Success Community, employs TLS as a key component of security. Unless updated to TLS 1.1 or higher, any inbound connections (e.g., your Internet browser) to these applications will receive an error message.

Mobile Access

The Success Community Mobile App is available for iOS and Android devices. Download the app from the Apple App Store or Google Play Store by clicking the links below or by searching “NextGen Success Community”. *



** Available for NextGen Main Client Community Users and NextGen Client Community Users.*

Use Remember Me

Use the **Remember Me** button on the home page to reduce your login time*. The system will pre-populate your username. Just enter your password and go.

nextgen healthcare | SUCCESS COMMUNITY

Username
[input field]

Password
[input field]

Login

Remember Me

Forgot Your Password?

Please enter your username as [your email address].nextgen

Supported browsers:

Mozilla Firefox | Google Chrome | Apple Safari

Need help logging in?
Give us a call at 855-657-4373

*Note that IT security settings at some practices prohibit this functionality. Please confirm with your IT department.



Session Time Out

By default, you will be logged out of the system after four (4) hours of inactivity.



Getting Started - Frequently Asked Questions

How many Success Community users can an account have?

There is no maximum to the number of Success Community users that an account can have.

Note that a main client community user has the ability to add, delete, and change the access for the Success Community and other NextGen® Healthcare applications (i.e. NextGen Share) for other users at your account. Please keep these capabilities in mind when selecting your main contacts.

Our main contact has left. How do I have myself promoted?

If you **do not have a current main contact**, please contact your Account Manager or open a case in the Success Community with Category: Community.

Can we add a user to only receive specific updates?

An example would be a user who only needs access to NextGen Enterprise Patient Portal updates.

For these kinds of users, we recommend granting them access to the Knowledge Community User profile. They can search Knowledge for articles related to their interest (i.e. NextGen Enterprise Patient Portal) as well as join the chatter groups related to those subjects. They will not have access to view or manage cases, view known issues, or manage other users.

Do users need unique login credentials to access the Success Community?

We have only one general office email address that multiple users access.

Yes. The Success Community profiles are tied to unique email addresses. There can only be one user profile per email address.

I completed a reset password, but I did not receive an email.

There are two common reasons to not receive a password reset email:

1. **The password reset email was sent to a spam, clutter, or junk email folder.** Please check these folders, as well as ensure that @nextgen.com is allowlisted.
2. **Your username was entered incorrectly.** Ensure that your username was entered as your work email followed by .nextgen. As a security feature, the system will not alert you to an incorrect username.



Can a child account view parent account information?

No. Child account contacts cannot see any information related to the parent account. Note: parent and child account relationships are not applicable to all clients.

Can I change my username on the Success Community?

Yes. However, we recommend not changing your username. This can cause errors in the event that you have access to another instance of Salesforce.

How can I update our main phone number?

Account level changes must be made by your Success Community team directly. Please submit a case with Category: Community.