Main Client Community User Guide

NextGen Healthcare Success Community

www.community.nextgen.com

v.5
Updated 3.18.24

Recommended prerequisite reading: [Success Community Getting Started Guide]

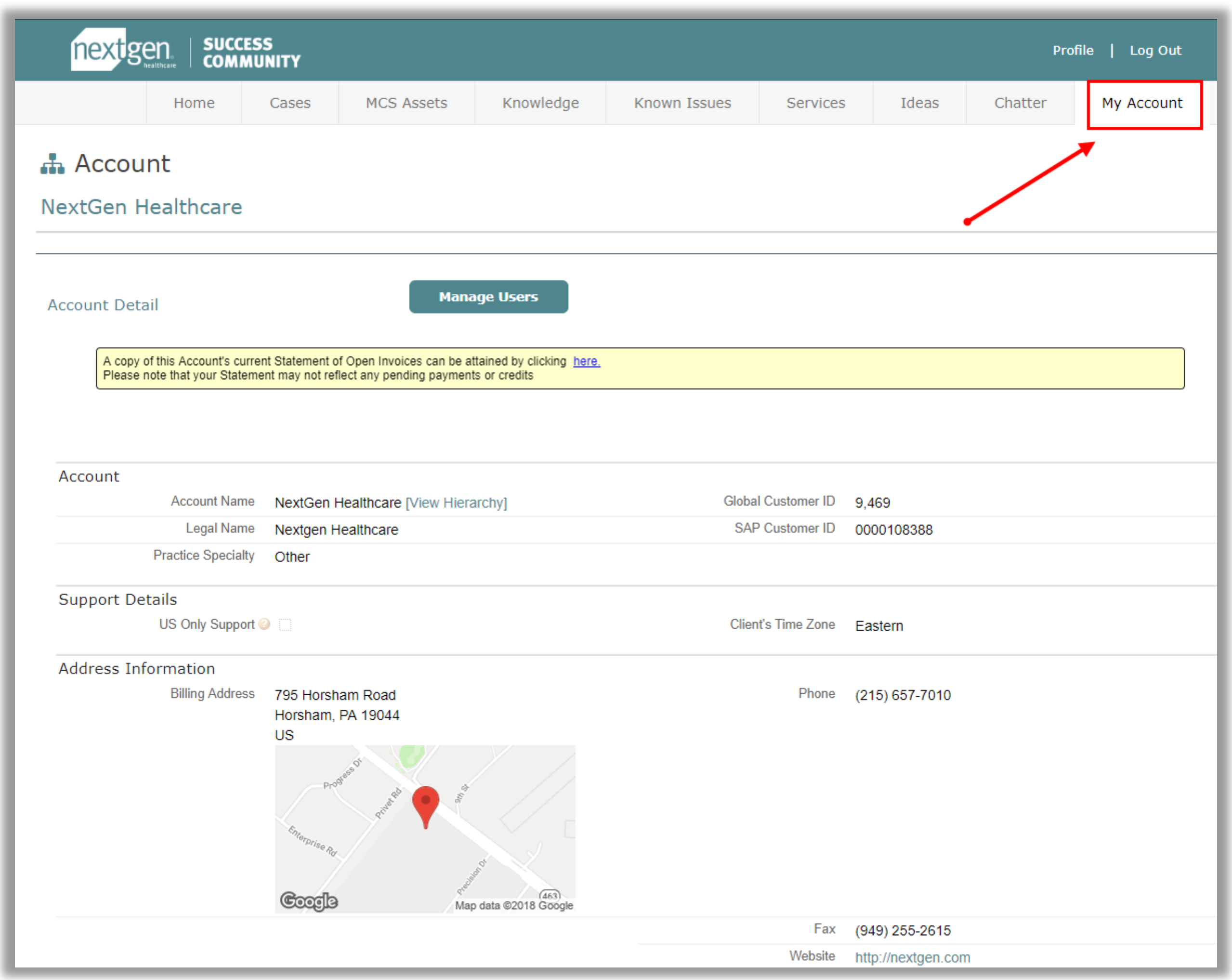
Overview

The Main Client Community user / Optimization Only Main Community User (Main Contact), is the main point of contact for your organization regarding the Success Community. It is critical to your successful adoption of the Success Community that your organization has at least one active main contact established at all times.

Note that a main client community user can add, delete, and change the access for the Success Community. Please keep these capabilities in mind when assigning main contacts.

Main Contact Role

As a Main Contact, you will have the Main Client Community User profile, granting you access to the *My Account tab* in the Success Community.



As a Main Contact, you have the following responsibilities:

Manage Success Community Users
Add & Deactivate

Reset User Passwords
Enable access quickly

Review Account Details

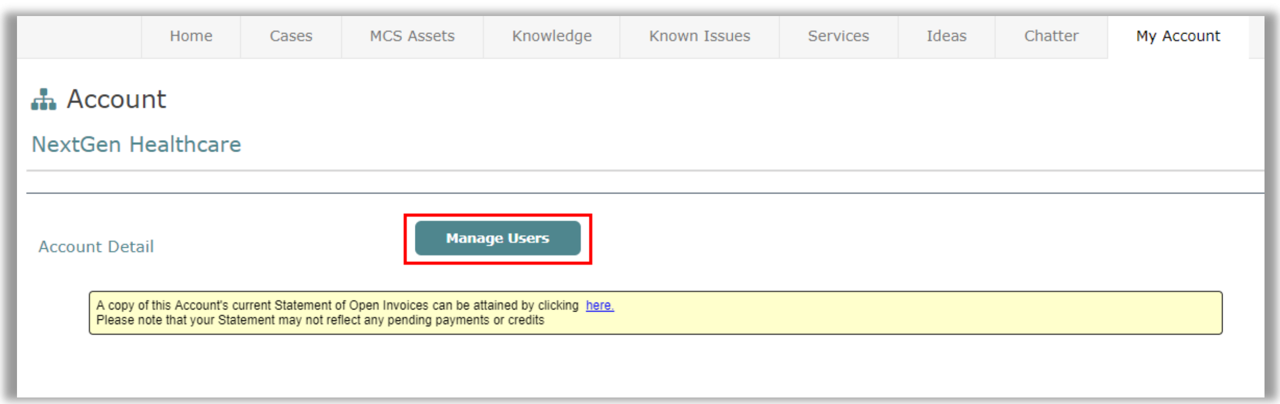
Access Statement of Open Invoices

Is This Role for You?

Main contacts should be reliable and accessible by their organization and may serve as a point of contact for important company updates. You should review your users quarterly to ensure we have the most up-to-date Success Community member and account information.

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**



Change 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.

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.	X	X		X	X	X
Submit and manage cases.	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.	X	X	X	X	X	X
Link to known issues.	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 Connected Health, NextGen Mobile, NextGen Population Health, or NextGen Patient Experience Platform solutions.
2. Only available to clients who have purchased NextGen Connected Health solutions or are hosted by NextGen Managed Cloud Services.

Add a New User

NEXTGEN OFFICE

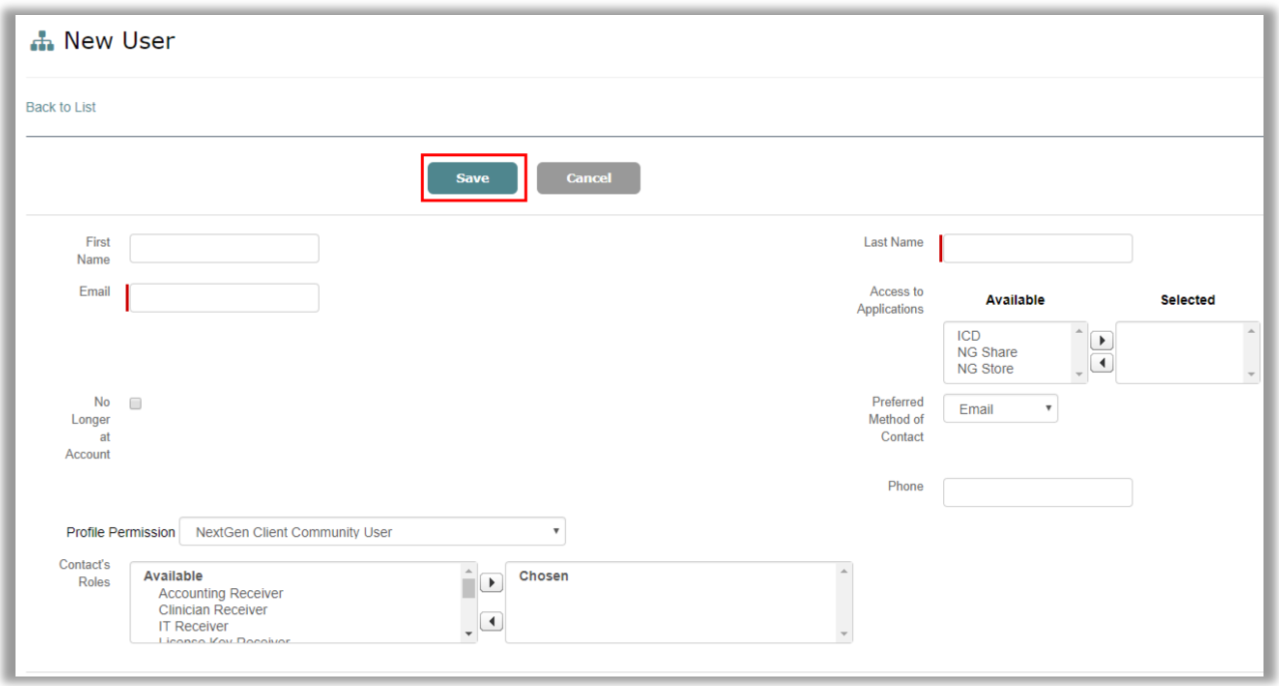
To create a new Success Community user, you must create a user directly in the NextGen Office application. A Success Community profile will be automatically created for that user with the Client Community User profile permission.

ALL OTHER CLIENTS

Please follow these instructions:

1. Click on **New User**.

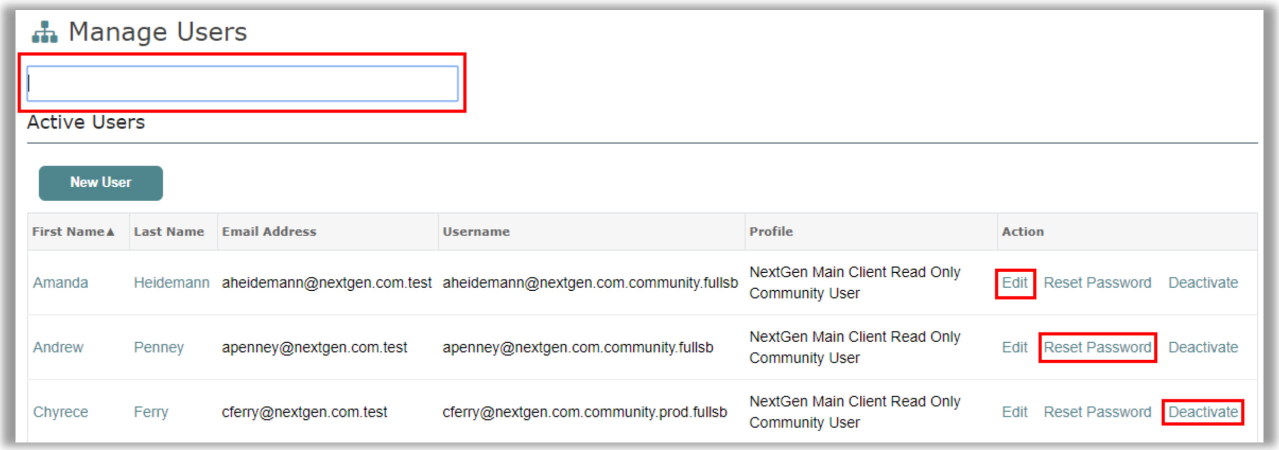
2. Complete the new user form and click **Save**.



When you add a user, they will receive a login email.

Modifying/Removing an Existing User / Reset Passwords

APPLICABLE TO ALL CLIENTS



On the *Manage Users* page, type the name of the user you are trying to modify in the search bar and press enter in 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.

Click Edit to modify the user's information.
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.

Click Reset Password to trigger a password reset. The user will receive an email with a link to reset their password.

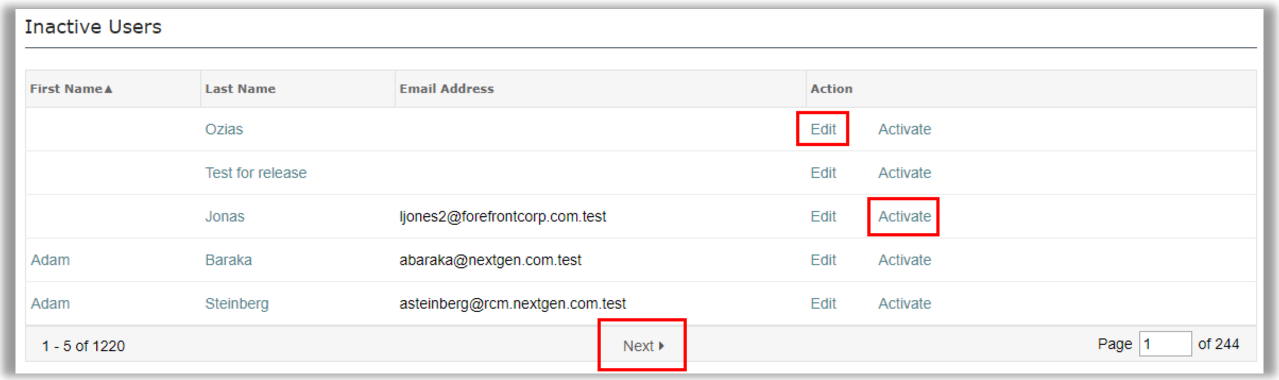
Click Deactivate to completely revoke a user's Success Community access. If you deactivate a user, they will move to the inactive list. Deactivating a user only revokes their Success Community access. It does not remove them from their product or our contact records.

When you change the email of a user, they 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

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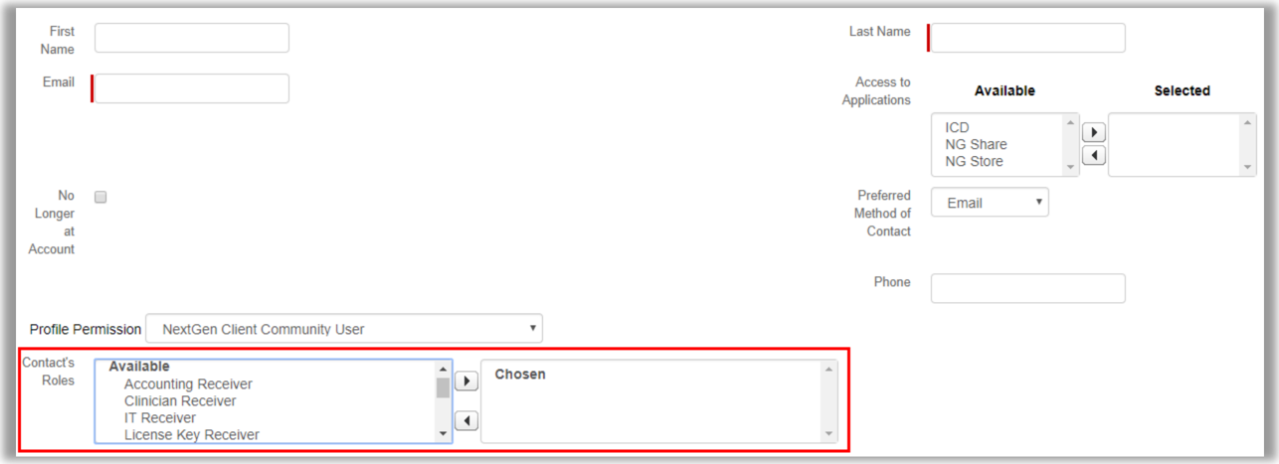
1. To activate an inactive user, locate the user by either typing their name in the search bar or clicking *Next* until you locate the user.
2. Click **Edit** to update the user's name and email address.
3. Click **Activate** to update the user's name, email address, Success Community profile permission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

When you activate a user, they 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.



Choose from:

- **Accounting Receiver –** Contact who handles billing questions.
- **Change Approver** – Contact with authority to approve Change Requests on behalf of your organization.
- **Clinician Receiver** – Medical professional at your organization.
- **Default Case Contact** – Contact who should be notified if we open a case on behalf of your organization.
- **IT Receiver –** Technical professional at your organization.
- **License Key Receiver** – Contact who would receive keys for any new product licenses.
- **NG Product Admin Receiver** – Non-clinical staff such as front office employee.
- **Outage Notification Receiver –** Contact who should be notified if there is an outage impacting 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** – Contact who should be notified if we need to discuss security information for your organization.
- **Super User –** Contact who is 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.

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.)