



Services Best Practices

NextGen Healthcare Success Community

www.community.nextgen.com

v.4

Updated 10.16.2020



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Tips on Using Services

Simulation Videos for Services

See how to use the Services tab by watching our quick simulation videos. Watch at the links below:

- [Registering for Services](#)
- [Attending Services](#)
- [Canceling a Services Registration](#)

Services versus Service Offering

A Service is a high-level services class / topic. The Service will include information such as a description of the service, who would benefit from attending, and any related course materials.

A service could have multiple service offerings. Scroll to the bottom of the service page to locate any service offerings available.

A Service Offering is a specific date, time, and in some cases, location for that service. Each available service offering includes a blue register button so that you can register for that particular date and time.

Sample Service	Sample Service Offering
Health Reform Simplified Webinar Series	Health Reform Simplified January 10, 2019, at 4:00 p.m. via Web



Upcoming Webinars Widget – Home Page

On the home page, the *Upcoming Webinars* widget lists three (3) to five (5) upcoming webinar offerings based on date. Click on the blue header of the webinar to go to the offering page. You will be able to register for that specific date and time.

UPCOMING WEBINARS

Upgrade Management Series: Gap Analysis- Integrated Approach to Combined Upgrade
During this webinar we will discuss how to complete a Current State Assessment including use of select T-SQL scripts, Workflow Analysis, Process Mapping, Process Assessment, and...

UDS Monthly Call
Monthly recurring call for UDS Reporting. Call is held on the last Thursday of every month. Monthly attendance is encouraged.

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[VIEW MORE >](#)

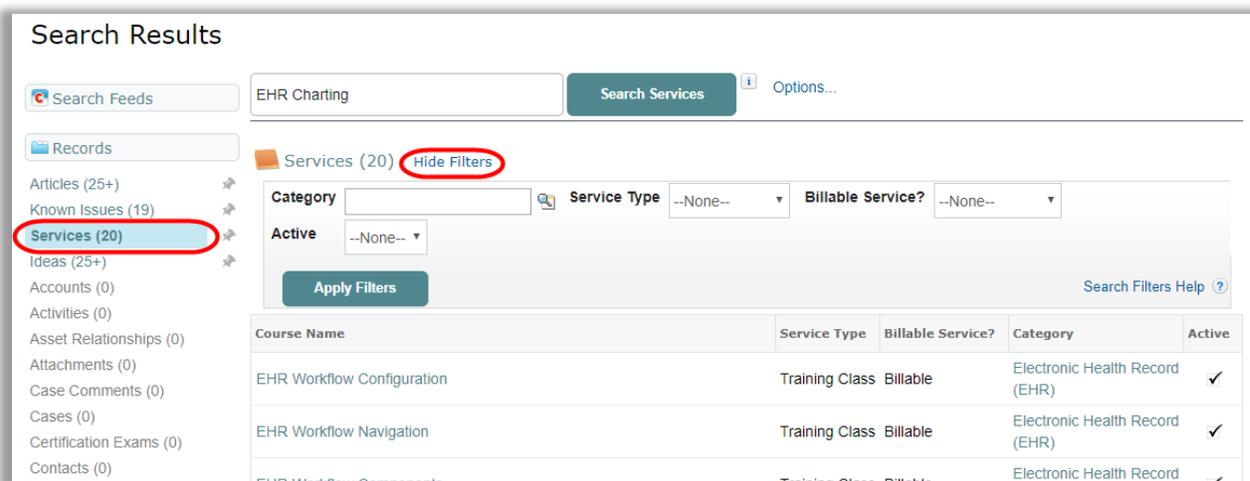
Click on the **Service Offering Name** in the widget and you will reach the registration page.

Search for Services with Global Search

You can search for any service using the global search bar at the top of the Success Community. Type in your search terms and press enter.



Filter your search results to see available services by selecting the *Services* record type from the left menu. Course with the *Active* check mark have offerings available for registration.



You can filter your services results further using the course filters located next to the word *Services* as shown above. You may have to expand filters by clicking on **Show Filters**.

Filter by:

- **Category** – What product, application or service is your course related to such as EDR or community?
- **Service Type** – Webinar, consulting service, seminar, or training class?
- **Billable Service** – Are you looking for a billable or complimentary service?
- **Active** – Choose between true (open for registration) or false (closed for registration).

Select **Apply Filters** to see your search results.

Learn more about global search by watching the [Using the Global Search](#) simulation video.



Services Tab

For step by step instructions on searching and registering for a service on the Services tab, we recommend checking out this simulation video: [Registering for Services](#)

The screenshot shows the 'Services' tab interface. It has two tabs: 'Find a Service' and 'My Services'. Below the tabs are five dropdown menus for filtering: 'Solution' (All), 'Category' (All), 'Objective' (All Service Objectives), 'Service Type' (All), and 'Billable Service' (All). Below these are 'From:' and 'To:' date pickers with a 'Reset' button. A note at the bottom states: 'If you would like to request a service that is not offered below, open a case with the subject of 'Services' and a representative will contact you.'

Find the right services for you by using filters.

Solution – Find services based on strategy like clinical or interoperability solutions.

Category – Find services based on product.

Objective – Find services based on strategic outcome like maximizing revenue.

Service Type – Filter by type of service like webinar or consulting.

Billable Course – Filter between billable and complimentary services.

Dates – Select the date range for the service offering that you are looking to register for.

Once you have found the course of interest, select the  to see the available service offerings.

The screenshot shows a service offering card for 'EHR Workflow Configuration' with a '\$ BILLABLE' tag. The card includes a description: 'This 3 day course includes an introduction to system applications, system configuration, file maintenance and table set-up, and user security access rights.' It also lists the cost: 'Cost: This course uses 24 Reduced hours (\$75/hr)'. There are two service offerings listed with their respective details and buttons:

Location	Dates	Time	Buttons
Irvine	08/21/2018 - 08/23/2018	08:30 AM - 05:30 PM Eastern	Register, View
Irvine	10/23/2018 - 10/25/2018	08:30 AM - 05:30 PM Eastern	Register, View

Register / Request – Click on register (complimentary) or request (billable) to go directly to the offering registration page.

View – Click on view to go to the service offering page for more details.

Registering / Requesting Services

Using one of the search methods previously described, click to open a Service page. Review the details and scroll down to the bottom of the page to select the offering (day/time/location) that fits your needs.

Service

UDS Monthly Call

Service Detail

Objective **Value-Based Care**

Service Details

Course Name **UDS Monthly Call**

Service Type **Webinar**

Service Summary **Monthly recurring call for UDS Reporting. Call is held on the last Thursday of every month. Monthly attendance is encouraged.**

Category **UDS**

Service Duration **1**

Additional Details

About this Service **Call to discuss UDS updates, best practices, and workflows.**

Target Audience **Users of UDS Reporting Tool and UDS Reports.**

Cost

Related e-Learning Services

Pre-Requisites

Solution **Clinical/Financial Solutions**

Custom Links **Service Materials**

Service Offerings (Open Service)

Action	Offering ID	Location	Start Date	Start Time	Class Length (in hours)
	Offer-1805-16170	Web	8/30/2018	02:00 PM	1
	Offer-1805-16171	Web	9/27/2018	02:00 PM	1
	Offer-1805-16172	Web	10/25/2018	02:00 PM	1
	Offer-1805-16173	Web	11/29/2018	02:00 PM	1

Click on the **Offering ID** to reach the Service Offering page to register.

Service Offerings (Open Service)

Action	Offering ID	Location	Start Date	Start Time	Class Length (in hours)
	Offer-1805-16170	Web	8/30/2018	02:00 PM	1
	Offer-1805-16171	Web	9/27/2018	02:00 PM	1
	Offer-1805-16172	Web	10/25/2018	02:00 PM	1
	Offer-1805-16173	Web	11/29/2018	02:00 PM	1

[^ Back To Top](#)
Always show me [more records per related list](#)

Service Offering

Offer-1805-16171

Service Offering Detail

Service Offering Details

Offering ID	Offer-1805-16171	Status	Open
Service Name	UDS Monthly Call	Location	Web

Register

Click on the **Register** button.

Your name and requested offering will be prepopulated. Click **Save** and you will be registered (complimentary) or the service will be requested (billable). You will receive an email confirmation.

New Service Attendance

Service Attendance Edit

Save
Save & New
Cancel

Attendee

Offering

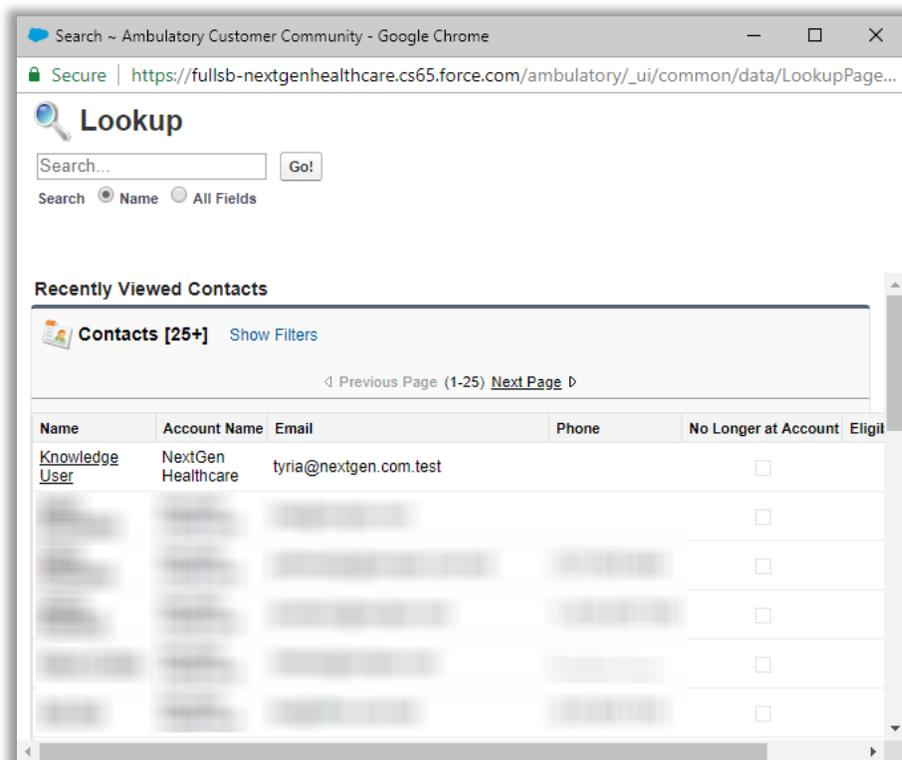
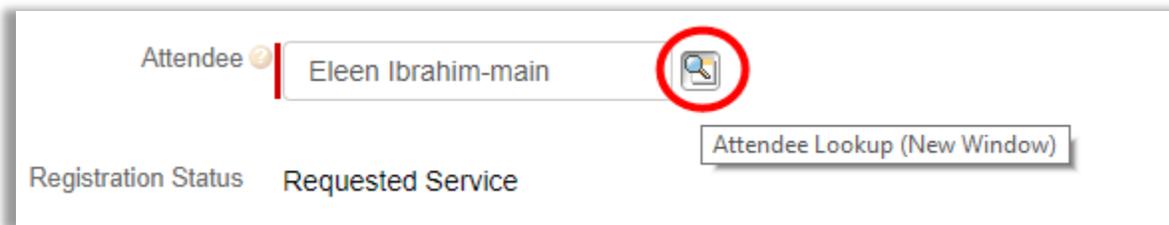
Registration Status Requested Service



REGISTERING / REQUESTING SERVICES FOR OTHERS

You can register other Success Community users from your organization for services.

On the register/request page, click on the **folder icon** to the right of Attendee to access the Attendee Lookup window and choose another attendee from your organization by clicking on their name.



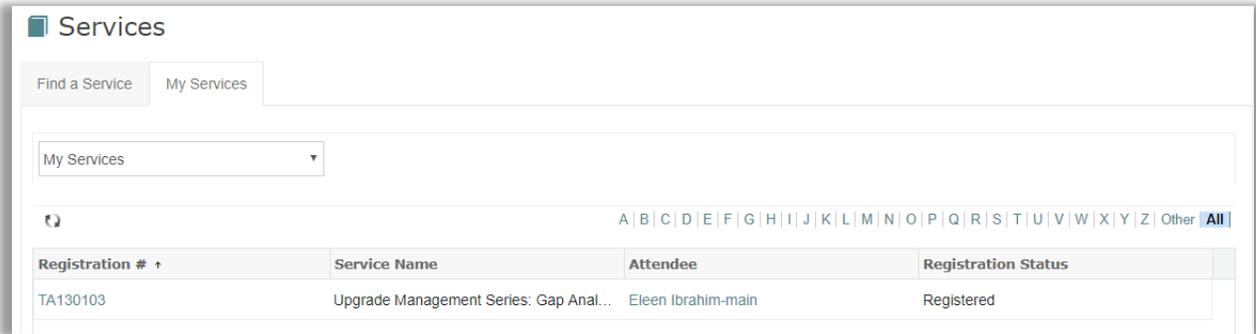
Click **Save** and they will be registered or the service will be requested for them. They will also receive an email confirmation.

Important Note: Any community member that can register for a services course can request a billable course. Please advise your organization of this before they register.



My Services Tab

The My Services tab keeps a running list of your services registration history.



There are several list views to choose from to find your history.

List View	Description
My Upcoming Services	Any offerings that you registered for or have been registered for by another member of your account, that has not yet occurred.
My Cancelled Services	Any offerings that you previously registered for that either you cancelled the registration or the course offering has been cancelled.
My Completed Services	Any offerings that you registered for that occurred in the past. This includes those you may or may not have actually attended.
My Services	A cumulative list of any offerings that you have registered for or have been registered for by another member of your account.
Upcoming Registrations Created by Me	Any offerings that you have registered for yourself or another community member from your account.



SERVICE ATTENDANCE CONFIRMATION / CANCEL REGISTRATION

From the Services Tab, click on **My Services**. Click on the **Registration #** for the Service Attendance record you would like to review.

Service Attendance

TA130103

Service Attendance Detail Cancel Request/Registration

Registration #	TA130103	Offering	Offer-1804-15961
Attendee	Eleen Ibrahim-main	Service Name	Upgrade Management Series: Gap Analysis-Integrated Approach to Combined Upgrade
Registration Status	Registered	Start Date	8/21/2018
Reason for Cancellation		Start Time	12:00 PM
Location	Web	End Date	8/21/2018
		End Time	01:30 PM
		Time Zone	Eastern
		Add To Calendar	Add to Calendar

Additional Details

Webex Details

From the Attendance Record you can:

- Review important details like date, time and WebEx details of your service.
- Cancel your request/registration.
- Add the registration to your calendar (an email confirmation with a link to add your calendar will automatically be emailed to you at registration as well).
- Download any service materials like PowerPoints or training guides.



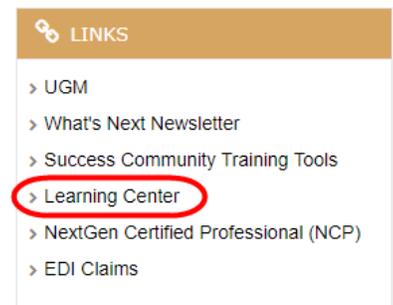
Frequently Asked Questions

Can I see our purchased services hours?

No. Your purchased services hours are not listed on the Success Community. However, your Account Manager can confirm your hours. He/she is listed on the Success Community home page.

Are eLearning courses available on the Services tab?

No. Your eLearning courses are available from the Learning Center at <http://learning.nextgen.com>. A link to the Learning Center is on the home page of the Success Community under links on applicable experiences.



Can any user enroll in a webinar?

Yes, any Success Community user can enroll in webinars.

Can we see service offerings in our time zone?

All web-based services courses are shown in ET and any on-site services are shown in the time zone of the course location.

I don't see a blue register button on the service offering to register.

First, be sure that you are on a service offerings page and not a course page. You can tell the difference, as a service offerings page lists the start/end date and time of the services.

Also try logging into the Success Community using a recommended browser (Mozilla Firefox, Google Chrome, or Apple Safari) and then registering for the service offering. There have been reported limitations in using internet explorer including the missing registration button.

What do I do if I lost my confirmation email?

Click on the My Services (within the Services tab) and open the registration attendance record. All of your key information will be listed on that confirmation. There is also an add to calendar button so you can resave the confirmation to your email calendar like outlook.