



# Getting Started Guide

NextGen Healthcare Success Community

[www.community.nextgen.com](http://www.community.nextgen.com)

v.6

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<b>LOG IN</b>	<b>3</b>
<b>PREVIOUS LOGIN CREDENTIALS</b>	<b>3</b>
<b>LOGGING IN FOR THE FIRST TIME</b>	<b>3</b>
STEP 1: RECEIVING YOUR LOGIN CREDENTIALS VIA EMAIL	3
STEP 2: SETTING YOUR PASSWORD	3
<b>PASSWORD RESETS</b>	<b>4</b>
<b>CHOOSING YOUR EXPERIENCE</b>	<b>5</b>
INITIAL LOGIN ON, OR AFTER MAY 8, 2017	5
WHAT IS IN EACH EXPERIENCE	5
CHANGING YOUR EXPERIENCE	6
<b>USER PROFILES, PERMISSIONS AND ACCESS</b>	<b>7</b>
<b>USER PROFILES AND PERMISSIONS</b>	<b>7</b>
<b>ADDING AND REMOVING MAIN CLIENT COMMUNITY USERS (MAIN CONTACTS)</b>	<b>7</b>
<b>ADDING, REMOVING, AND MODIFYING USERS</b>	<b>8</b>
ADD A NEW USER	8
MODIFYING / REMOVING AN EXISTING USER	9
INACTIVE USERS	10
<b>CONTACT ROLES</b>	<b>10</b>
<b>ACCESS TO APPLICATIONS</b>	<b>11</b>
<b>CHILD ACCOUNTS</b>	<b>11</b>
<b>TIPS ON ACCESSING THE SUCCESS COMMUNITY</b>	<b>12</b>
<b>HOW TO WHITELIST EMAIL ADDRESSES</b>	<b>12</b>
OUTLOOK 2003 - 2007	12
OUTLOOK 2010 - 2013	12
<b>SUPPORTED BROWSERS</b>	<b>12</b>
<b>BANDWIDTH REQUIREMENTS FOR THE SUCCESS COMMUNITY</b>	<b>12</b>
<b>SECURITY OVERVIEW FOR SUCCESS COMMUNITY AND SALESFORCE</b>	<b>12</b>
<b>SECURITY REQUIREMENTS FOR ACCESSING THE SUCCESS COMMUNITY</b>	<b>13</b>
<b>MOBILE ACCESS</b>	<b>13</b>
<b>USE REMEMBER ME</b>	<b>13</b>
<b>SESSION TIME OUT</b>	<b>14</b>
<b>GETTING STARTED - FREQUENTLY ASKED QUESTIONS</b>	<b>15</b>
HOW MANY SUCCESS COMMUNITY USERS CAN AN ACCOUNT HAVE?	15
OUR MAIN CONTACT HAS LEFT. HOW DO I HAVE MYSELF PROMOTED?	15
CAN WE ADD A USER TO ONLY RECEIVE SPECIFIC UPDATES?	15
DO USERS NEED UNIQUE LOGIN CREDENTIALS TO ACCESS SUCCESS?	15
I COMPLETED A RESET PASSWORD, BUT I DID NOT RECEIVE AN EMAIL.	15
CAN A CHILD ACCOUNT VIEW PARENT ACCOUNT INFORMATION?	15
CAN I CHANGE MY USERNAME ON THE SUCCESS COMMUNITY?	16
HOW CAN I UPDATE OUR MAIN PHONE NUMBER?	16



## 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.

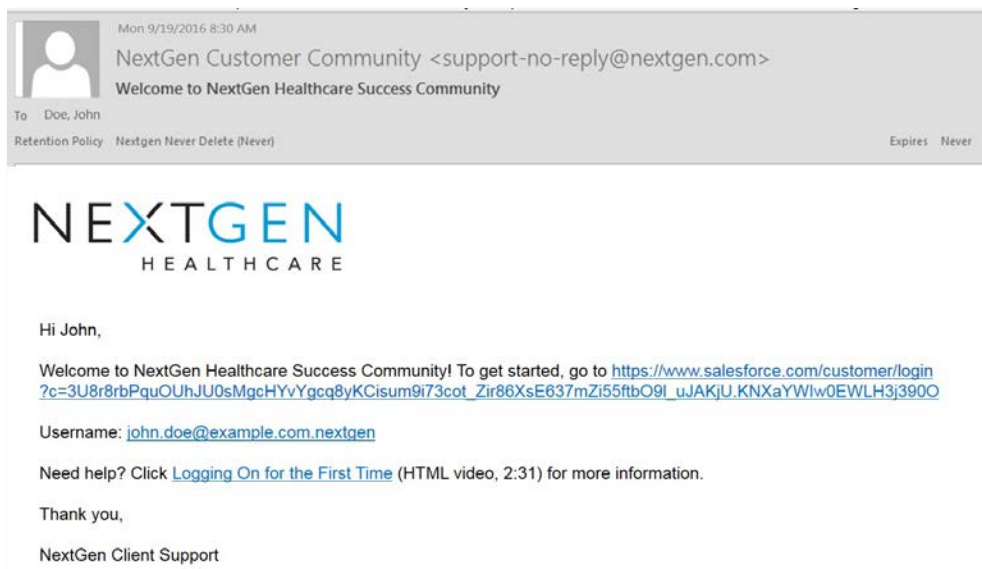
## Previous Login Credentials

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 + .nextgen** on the end. So for example:

Email Address: [john.doe@example.com](mailto:john.doe@example.com) Username: [john.doe@example.com.nextgen](mailto:john.doe@example.com.nextgen)

This email will come from [Support-No-Reply@nextgen.com](mailto:Support-No-Reply@nextgen.com). Please be sure to “whitelist” this email address so the email does not go to your spam folder. See [how to whitelist 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, one uppercase letter, one lowercase letter, and one number. When your password fulfills each requirement, the circle next to the requirement will turn green.

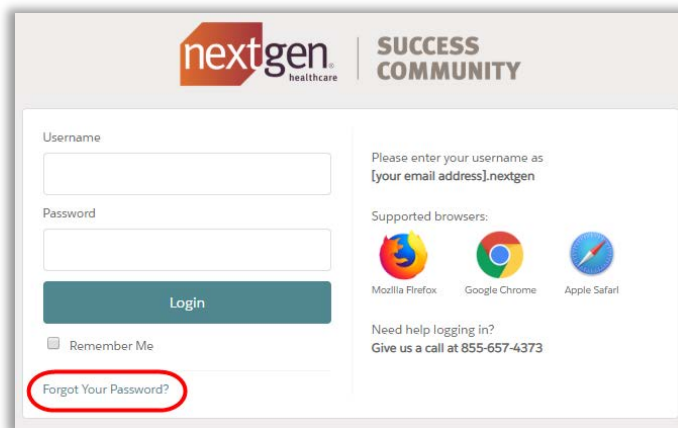
Enter your password and then enter it again under *confirm new password*. When you've entered matching passwords that fulfill all of the requirements, select the change password button. You will now enter the Success Community.

If you do not receive this email by 12:00 p.m. ET on your launch day, email [SuccessCommunity@nextgen.com](mailto:SuccessCommunity@nextgen.com).

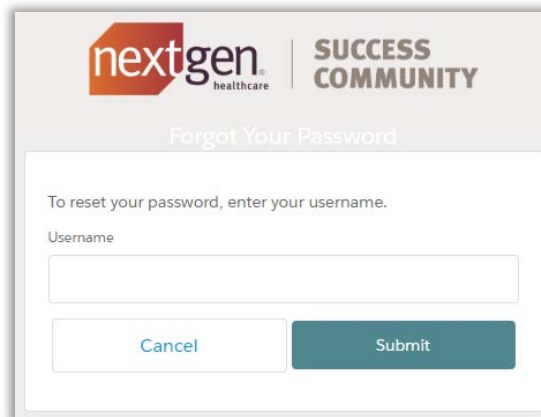
## Password Resets

There are two ways to reset a password.

1. A user can use the **forgot password** option on the login screen of the Success Community. Click on *Forgot Your Password* on the Success Community login screen.



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



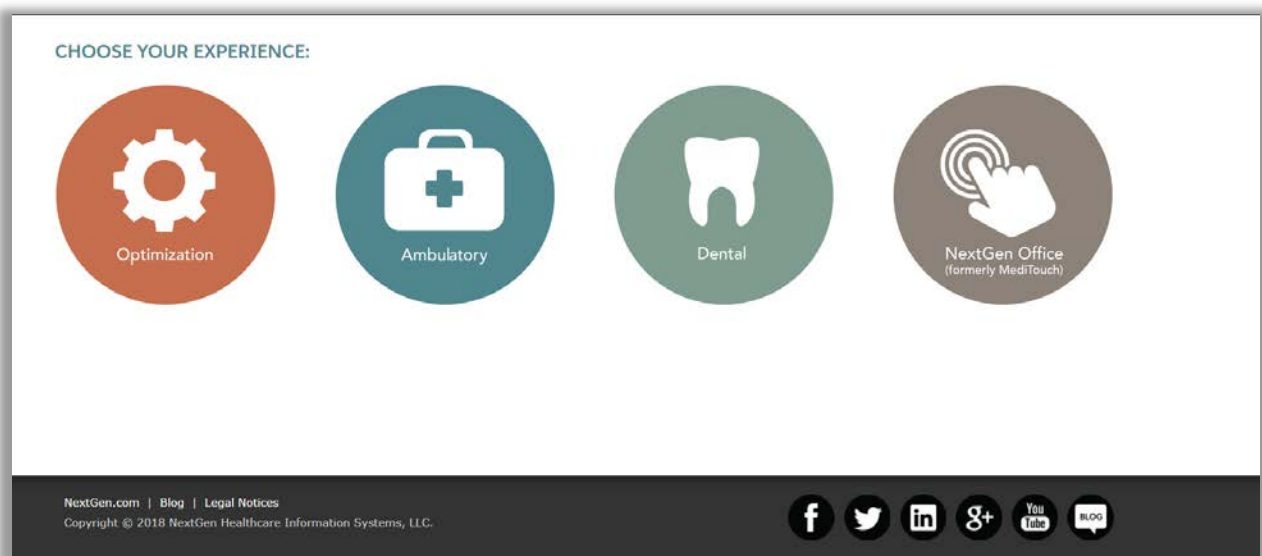
Click submit and you should receive an email to reset your password. [What if I don't receive an email?](#)

2. A main client community user (Main contact) easily can reset passwords for users at their practice directly from the Success Community *My Account Tab*.

## Choosing Your Experience

### INITIAL LOGIN ON

When you log into the Success Community for the first time, you will be greeted with the following Choose Your Experience screen:



**Important Note:** If you have only purchased Mirth, Entrada or EagleDream Health, you will be redirected automatically to the Optimization Success Community.

Click on the most relevant experience based on your purchased solutions. Once you have chosen, you will no longer be greeted with this screen for future log ins.

The next time that you log in, you will be redirected automatically to the last experience you were in when you last logged in. For example, if you logged off from the Dental experience, the next time you log in, you will automatically log into the dental experience.

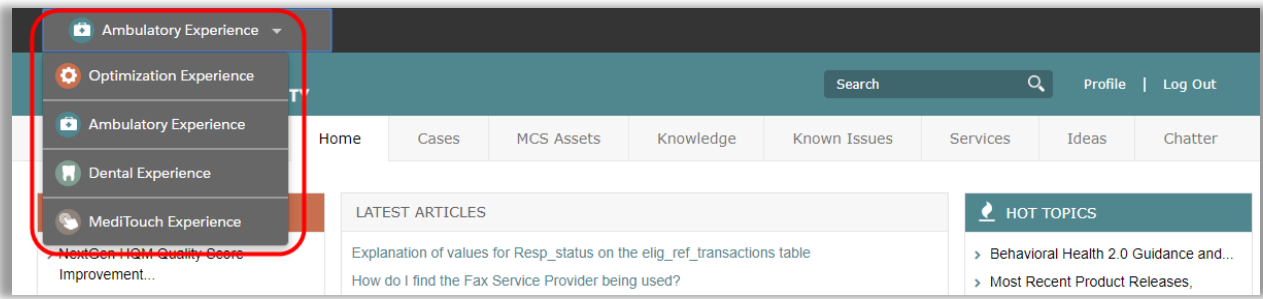
### WHAT IS IN EACH EXPERIENCE

Each experience is completed with information, articles and more specific to that experience. So if you choose the MediTouch experience, all of the knowledge, ideas, chatter, known issues and services will be specific to MediTouch.

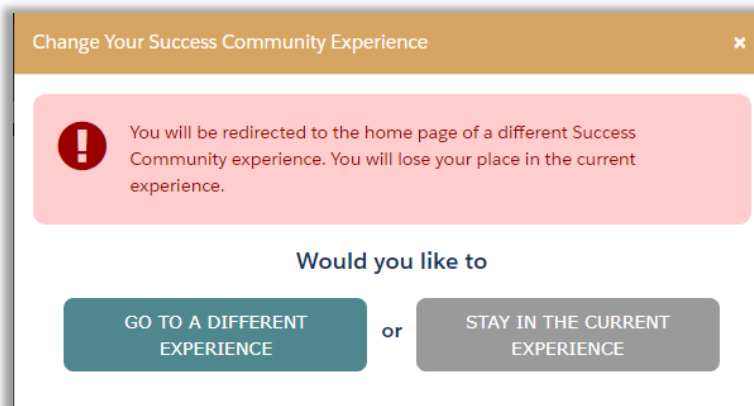
Cases are the exception. You can manage all of your cases from any experience; however, if you need to open a new case, you must do that from the appropriate experience to see the applicable case categories, recommend knowledge articles, known issues and questions.

## 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.





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

1. Clients who have only purchased Mirth, Entrada or EagleDream Health products and solutions.
2. Only available to clients who have purchased Mirth products and solutions or are Ambulatory hosted.

### 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 the support team.

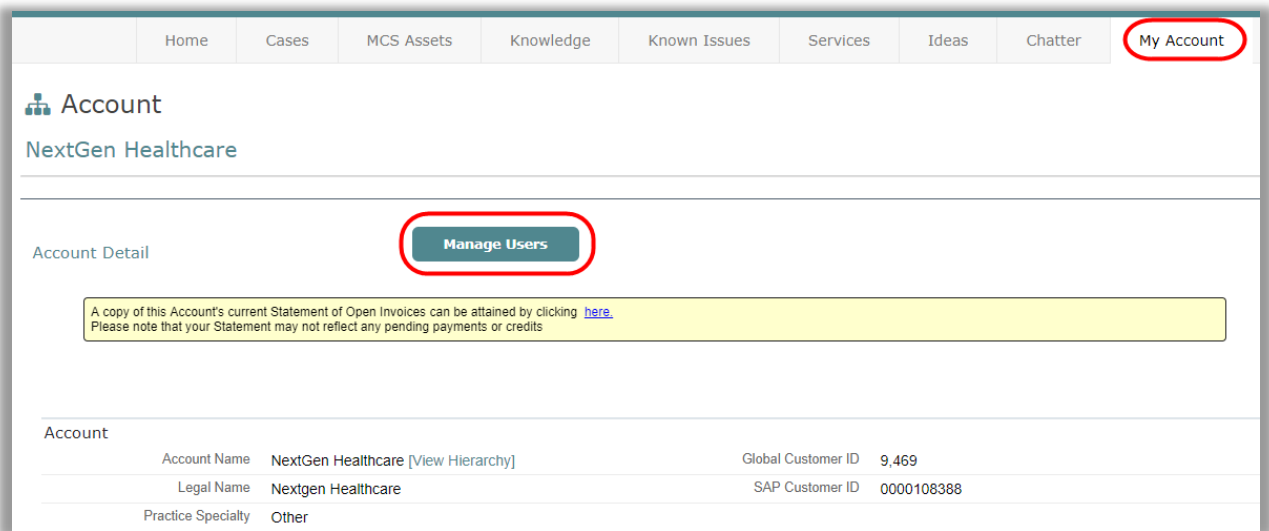


To add or remove a main contact, an existing main contact can submit a case in the Success Community with the category “Community” or by calling our support line at 855-657-4373.

## 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

**MediTouch Important Note** - To create a new Success Community user, you must create a user directly in the MediTouch product. A Success Community profile will be automatically created for that user with the Knowledge Community User profile permission.

**All other clients**, please follow these instructions.

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







2. Complete the new user form and click save.

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

## MODIFYING / REMOVING AN EXISTING USER

Applicable to all clients

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	<a href="#">Edit</a> <a href="#">Reset Password</a> <a href="#">Deactivate</a>
Andrew	Penney	apenney@nextgen.com.test	apenney@nextgen.com.community.fullsb	NextGen Main Client Read Only Community User	<a href="#">Edit</a> <a href="#">Reset Password</a> <a href="#">Deactivate</a>
Chyrece	Ferry	cferry@nextgen.com.test	cferry@nextgen.com.community.prod.fullsb	NextGen Main Client Read Only Community User	<a href="#">Edit</a> <a href="#">Reset Password</a> <a href="#">Deactivate</a>

**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. Or you can 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:** MediTouch users can only change profile permission and contact role in the Success Community. All other changes must be made directly in MediTouch.
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

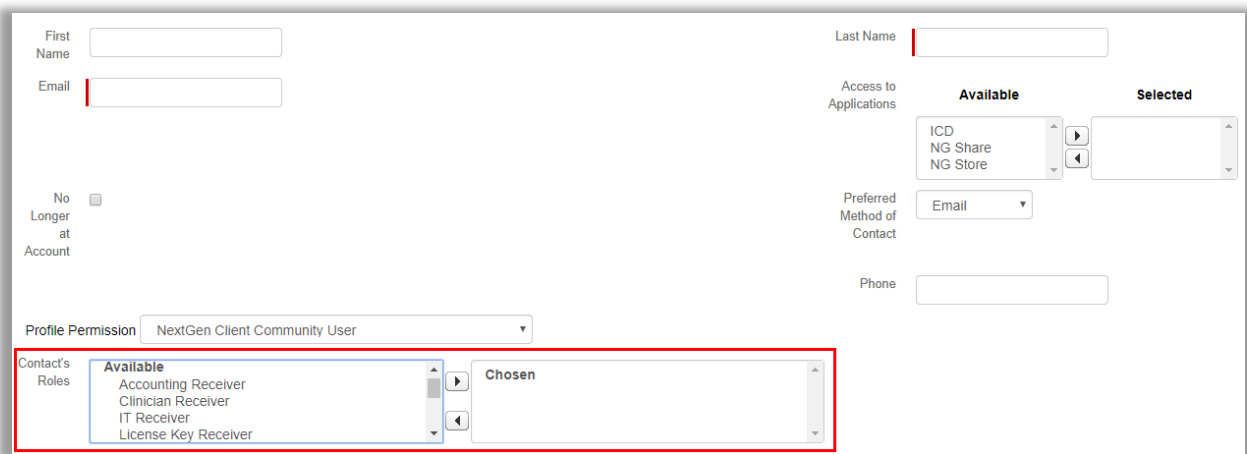
1 - 5 of 1220 Next ▶ Page 1 of 244

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 of the 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 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 (Front Office) 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 Ambulatory clients

Once a user has been added to the Success Community, they can be granted access to other NextGen® 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 \(HTML video, 0:48\)](#).

## 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 Whitelist 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 whitelist, 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

Starting on Saturday, March 10, 2018, to access the Success Community, users must leverage a Transport Layer Security (TLS) 1.1 security protocol. We are making 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 is mobile-friendly and can be accessed from smart phones or tablets through your mobile web browser.

## 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.

A screenshot of the NextGen Success Community login page. The page has a light gray header with the NextGen Healthcare logo on the left and the text "SUCCESS COMMUNITY" on the right. Below the header is a white login form. On the left side of the form, there are two input fields: "Username" and "Password". Below the "Password" field is a teal "Login" button. Underneath the "Login" button is a checkbox labeled "Remember Me", which is highlighted with a red rectangular border. Below the "Remember Me" checkbox is a link that says "Forgot Your Password?". On the right side of the form, there is instructional text: "Please enter your username as [your email address].nextgen". Below this is the heading "Supported browsers:" followed by three browser icons: Mozilla Firefox, Google Chrome, and Apple Safari. At the bottom right of the form, there is a link that says "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® 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 *Community* case in the Success Community.

### Can we add a user to only receive specific updates?

***An example would be a user who only needs access to NextGen 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. Next Gen 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 Success?

***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 whitelisted.
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 the Product Category “community.”