



Main Client Community User Guide

NextGen Healthcare Success Community

www.community.nextgen.com

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Recommended prerequisite reading: [Success Community Getting Started Guide](#)

Overview

The Main Client Community user / Mirth 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.

The screenshot displays the 'My Account' page in the Success Community. The navigation menu at the top includes 'Home', 'Cases', 'MCS Assets', 'Knowledge', 'Known Issues', 'Services', 'Ideas', 'Chatter', and 'My Account' (highlighted with a red box). The page content includes:

- Account Detail:** A 'Manage Users' button and a yellow notification box stating: "A copy of this Account's current Statement of Open Invoices can be attained by clicking [here](#). Please note that your Statement may not reflect any pending payments or credits."
- Account Information:**

Account Name	NextGen Healthcare [View Hierarchy]	Global Customer ID	9,469
Legal Name	Nextgen Healthcare	SAP Customer ID	0000108388
Practice Specialty	Other		
- Support Details:**

US Only Support	<input type="checkbox"/>	Client's Time Zone	Eastern
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- Address Information:**

Billing Address	795 Horsham Road Horsham, PA 19044 US	Phone	(215) 657-7010
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A Google Map shows the location at 795 Horsham Road, Horsham, PA.
- Contact Information:**

Fax	(949) 255-2615
Website	http://nextgen.com



As a Main Contact, you have the following responsibilities:

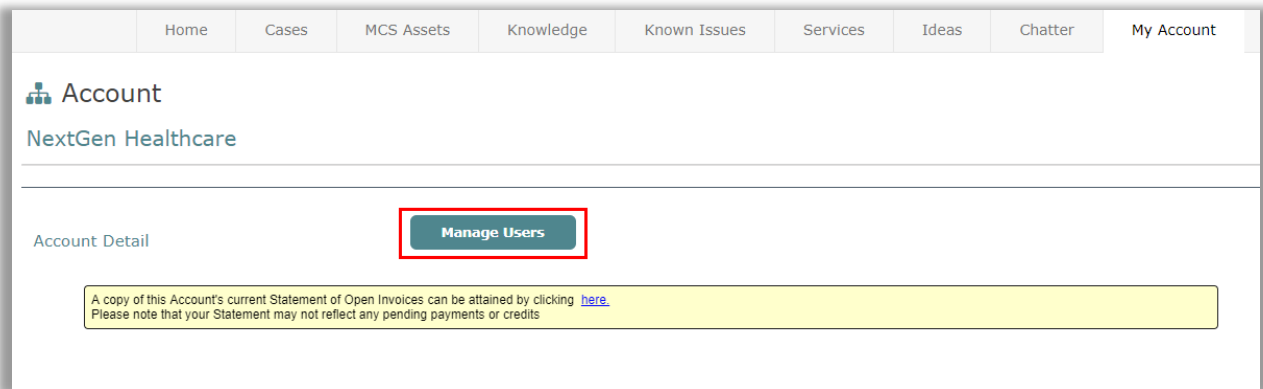


Is This Role for You?

Main contacts should be reliable and accessible by their organization, and may serve as a point of contact for important company updates. You need to 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 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.



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



Add a New User

MEDITOUCH

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.

First Name	Last Name	Email Address	Username	Profile	Action
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2. Complete the new user form and click *Save*.

Back to List

Save **Cancel**

First Name:

Last Name:

Email:

Phone:

Access to Applications: Available: ICD, NG Share, NG Store | Selected:

Preferred Method of Contact:

No Longer at Account:

Profile Permission: NextGen Client Community User

Contact's Roles: Available: Accounting Receiver, Clinician Receiver, IT Receiver, License Key Receiver | Chosen:

When you add a user, he or she will receive a login email.



Modifying/Removing an Existing User / Reset Passwords

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. The Action column contains 'Edit', 'Reset Password', and 'Deactivate' buttons for each user. The 'Edit' button for Amanda Heidemann, the 'Reset Password' button for Andrew Penney, and the 'Deactivate' button for Chyrece Ferry 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 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.

Click edit to modify the user's information.

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

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, 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.

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

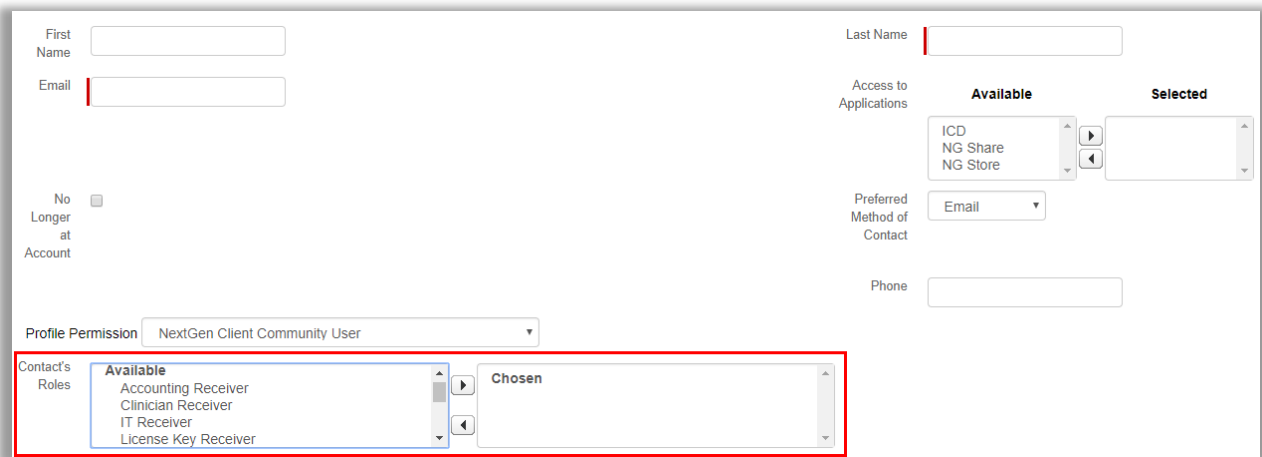
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1. To activate an inactive user, locate the user by either typing their name in the search bar or clicking next until you locate the user.
2. Click edit to update the user's name and email address.
3. Click activate to update the user's name, email 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, 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.



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.

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.)