



Quick Reference Guide

NextGen Healthcare Success Community

v.1

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Contents

Logging In for the First Time	3
Creating a Case	4
Search Tips and Tricks	5
Knowledge	6
Chatter Groups.....	7
Additional Resources.....	9



Logging In for the First Time

The following instructions will guide you through logging in to the Success Community for the first time. This is also available in our [Logging In for the First Time](#) simulation video.

STEP 1: RECEIVE YOUR LOGIN CREDENTIALS VIA EMAIL

You will receive an email containing your Success Community username and a hyperlink to help you set up your password.

This email will come from Support-No-Reply@nextgen.com. Please ensure to allowlist this email address so the email does not go to your spam folder.

If you do not receive the email and have already allowlisted “@nextgen.com”, please contact SuccessCommunity@nextgen.com.

STEP 2: SET UP YOUR PASSWORD

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

Your password must be at least eight characters long and include one letter, one number, and one special character. As you meet each requirement, the corresponding circle will turn green.

Enter your password, then re-enter it in the Confirm New Password field. Once the passwords match and fulfill all requirements, click the **Change Password** button. You will then be logged in to the Success Community.

STEP 3: VERIFY YOUR INFORMATION IS CORRECT

Ensure that your profile information, including your phone number and email, is accurate and up to date.

Resetting Your Password

If you need to reset your password, there are three options to accomplish this:

1. If you know your current password, you can reset your password from your profile in the Success Community.
2. If you do not know your current password, you can use the Forgot Your Password option on the Success Community login screen.
3. A Main Client Community User (Main Contact) can reset your password from the My Account Tab.

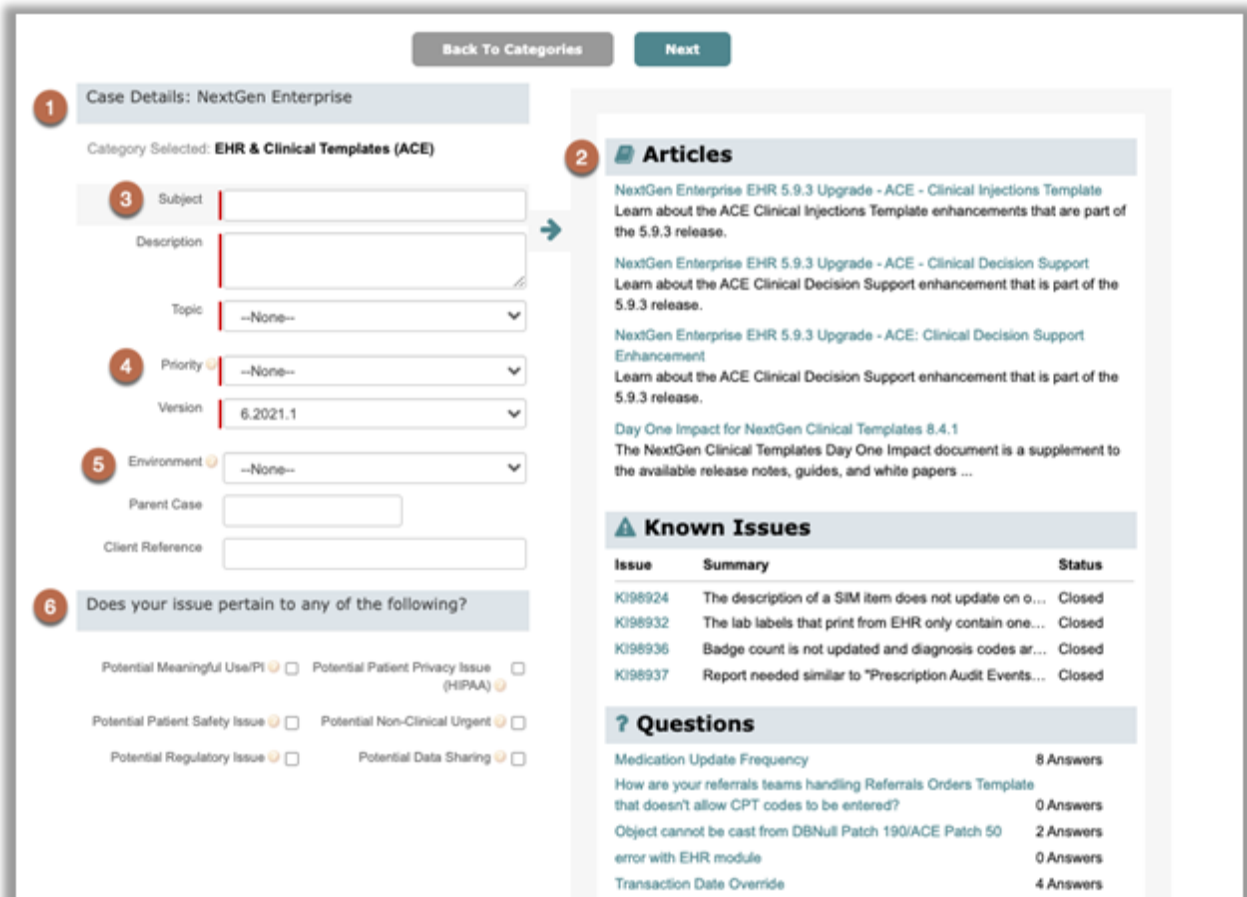
Creating a Case

You can start creating a case in the Success Community from two locations:

1. From the Active Cases widget on the home page, click on **CREATE CASE**.
2. Navigate to the Cases tab, then select **Create New Case**.

Both options will take you to the Category Select screen. Here, choose the product that applies to your case. To narrow down by product family, utilize the Filter by Brand option. Additionally, you can over a product name to view a brief description.

Case Details Screen



Back To Categories
Next

1 Case Details: NextGen Enterprise

Category Selected: **EHR & Clinical Templates (ACE)**

3 Subject

Description

Topic

4 Priority

Version

5 Environment

Parent Case

Client Reference

6 Does your issue pertain to any of the following?

Potential Meaningful Use/PI Potential Patient Privacy Issue (HIPAA)

Potential Patient Safety Issue Potential Non-Clinical Urgent

Potential Regulatory Issue Potential Data Sharing

2 **Articles**

NextGen Enterprise EHR 5.9.3 Upgrade - ACE - Clinical Injections Template
Learn about the ACE Clinical Injections Template enhancements that are part of the 5.9.3 release.

NextGen Enterprise EHR 5.9.3 Upgrade - ACE - Clinical Decision Support
Learn about the ACE Clinical Decision Support enhancement that is part of the 5.9.3 release.

NextGen Enterprise EHR 5.9.3 Upgrade - ACE: Clinical Decision Support Enhancement
Learn about the ACE Clinical Decision Support enhancement that is part of the 5.9.3 release.

Day One Impact for NextGen Clinical Templates 8.4.1
The NextGen Clinical Templates Day One Impact document is a supplement to the available release notes, guides, and white papers ...

Known Issues

Issue	Summary	Status
KI98924	The description of a SIM item does not update on o...	Closed
KI98932	The lab labels that print from EHR only contain one...	Closed
KI98936	Badge count is not updated and diagnosis codes ar...	Closed
KI98937	Report needed similar to "Prescription Audit Events...	Closed

? Questions

Medication Update Frequency 8 Answers

How are your referrals teams handling Referrals Orders Template that doesn't allow CPT codes to be entered? 0 Answers

Object cannot be cast from DBNull Patch 190/ACE Patch 50 2 Answers

error with EHR module 0 Answers

Transaction Date Override 4 Answers

1. Category

The product your case is in reference to.

2. Case Assistance Panel

Articles, known issues, and chatter questions related to the product and subject, to help address your questions before you submit a case.



3. Subject, Description and Topic *(required)*

The Subject field is for a summary of your question or issue. The Topic field is a pre-defined picklist where you can select the product or functionality most relevant to your case. The Description field allows you to provide a more detailed explanation of your case.

4. Priority and Version

Use the Version picklist to choose your product version. Select “N/A” if you are unsure or if version is not applicable.

Priority Levels (required)

Priority informs NextGen Healthcare how critical your case is to your organization.

- Priority 1 – The problem results in extremely serious interruptions to a production system.
- Priority 2 – The problem results in serious interruptions to normal operations or urgent deadlines are at risk.
- Priority 3 – The problem causes interruptions to normal operations but does not prevent operation of a production system.
- Priority 4 – The problem results in minimal or no interruptions to normal operations.

5. Environment, Parent Case, Child Account, and Client Ref

Select the Environment your case pertains to. If your case is related to another case, include that case number in the Parent Case field.

Child Account (required)

If you are a reseller or an account that manages child accounts, you will also see a field called Child Account where you can select the child account the case is related to.

Client Ref #

If your organization utilizes its own ticketing system, this field enables you to link the ticket number from your internal support system to a case.

6. Potential Critical Issue Check Boxes

If your case involves a potential critical issue, select the relevant checkboxes. You will be prompted to provide additional details on the next screen. This applies to certain products.

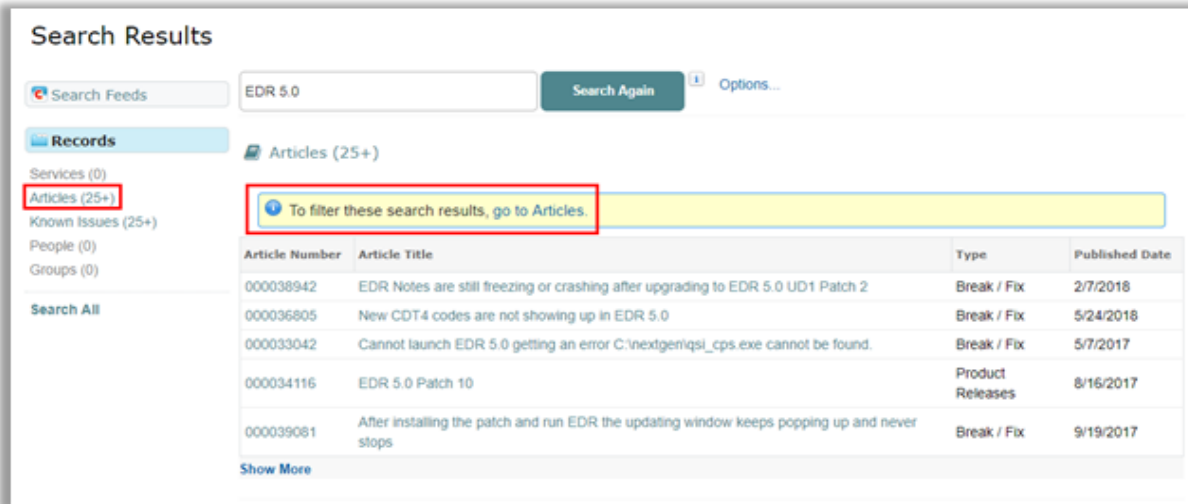
For more tips on creating a case, [click here](#).

Search Tips and Tricks

Global Search

You can search the entire Success Community using the global search bar located at the top of the page. Simply enter your search terms and press **Enter**. The community will search all the content within the Success Community.

To refine your search results, use the Records panel on the left side of the screen. For instance, if you only want to see articles in your search results, select the Articles record type from the left menu. Scroll through the results or click on “go to Articles” to refine your search criteria. This action will open the Knowledge tab with your search terms already populated.



Search Tricks

TRICK	WHEN TO USE	EXAMPLE
Wildcard	Use an asterisk before or after part of a word to find variations of that word.	Not sure if you need to search <i>reporting</i> , <i>report</i> , or <i>reports</i> ? Type <i>report*</i> and see results for the word with varied endings.
Quotes	Use quotes around words to search for an exact phrase in the Success Community.	A search for “ <i>Clinical Modules</i> ” returns any content in the Success Community that contains the phrase <i>Clinical Modules</i> , in that order.
AND	Use AND between words or phrases to search for content that contains both in any order.	A search for <i>Dental</i> AND <i>records</i> returns any content that includes both terms in any order.
OR	Use OR between words or phrases to search for content that may contain either word/phrase.	A search for <i>EHR</i> OR <i>EMR</i> returns any content that includes either word or phrase.

Knowledge

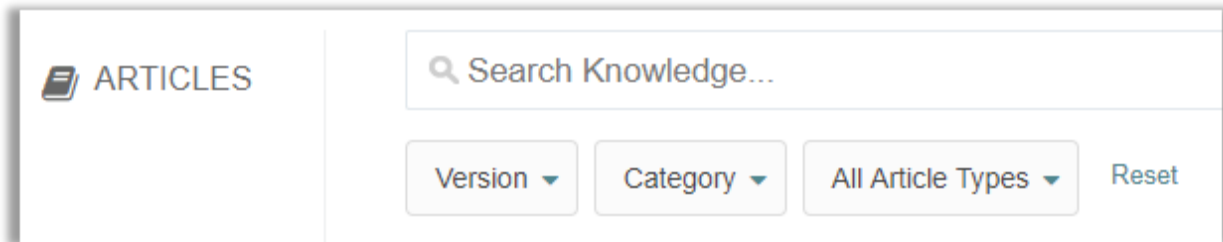
Searching through the Knowledge Tab

In the Knowledge tab, type your search criteria in the search bar and press **Enter**. The community will search through all knowledge articles including titles, content, attachments, and keywords.



Knowledge Filters

You can refine your search criteria by filtering by version, category, and article type.



- **Filter by Version** – The community will search for articles relevant to that product version.
- **Filter by Category** – The community will search for articles relevant to that product or solution.
- **Filter by Article Type** – The community will search for specific types of content, such as user guides or product releases.

Chatter Groups

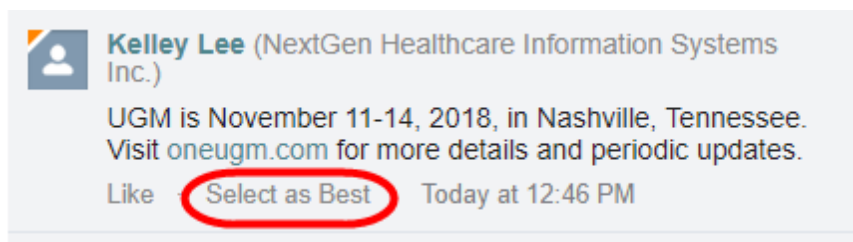
Chatter groups are designed to enhance communication and collaboration within the Success Community. They streamline your experience and ensure you can receive important updates from NextGen Healthcare, participate in meaningful discussions, and stay connected with the community. For a full list of Chatter groups, [click here](#).

Posting in Chatter Groups

It's recommended to post your questions in a Chatter group so other clients can view and respond to them. Questions posted on your profile will only be seen by your followers.

Choosing the Best Answer for your Chatter Question

After asking a question in Chatter and receiving multiple answers, you can choose the best one. Selecting the best answer moves it to the top of the comments, making it easier for others with the same question to find the most helpful response quickly.



Tagging your Post with Topics

Topic pages automatically collect the latest content from Chatter discussions. You can follow topics to quickly find the information most important to you.

When adding topics to a post, it's important to be consistent and use terms other community members are likely to search for.

Here are some examples of topics you might consider adding to your posts:

- *#Enterprise PM*
- *#Enterprise EHR*
- *#EDI*
- *#HQM*
- *#Share*
- *#PxP Portal*
- *#Virtual Visits*
- *#Primary Care*
- *#FQHC*
- *#Ophthalmology*
- *#Cardiology*
- *#Orthopedics*



Chatter Email Digest Settings

Stay updated on conversations, insights, and topics of interest at your preferred frequency with your Chatter email digest settings. You can find instructions on how to set your digest settings and the recommended settings by group [here](#).

Additional Resources

Access the following best practice guides that demonstrate how to utilize the Success Community.

[Getting Started Guide](#)

[Main Contact Best Practices](#)

[Cases Best Practices](#)

[Known Issues Best Practices](#)

[Knowledge Best Practices](#)

[Chatter Best Practices](#)

[Change Requests Best Practices](#)