



# Main Client Community User Guide

NextGen Healthcare Success Community

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

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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.

The screenshot displays the 'My Account' page in the NextGen 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 and a red arrow). The page content is organized into sections: Account (NextGen Healthcare), Account Detail (with a Manage Users button), Account Information (including Account Name, Legal Name, Practice Specialty, Global Customer ID, and SAP Customer ID), Support Details (including US Only Support and Client's Time Zone), and Address Information (including Billing Address and Phone). A yellow box contains a message about the Statement of Open Invoices. At the bottom, contact information for Fax and Website is provided.

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

Support Details	
US Only Support	<input type="checkbox"/>
Client's Time Zone	Eastern

Address Information	
Billing Address	795 Horsham Road Horsham, PA 19044 US
Phone	(215) 657-7010

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



As a Main Contact, you have the following responsibilities:

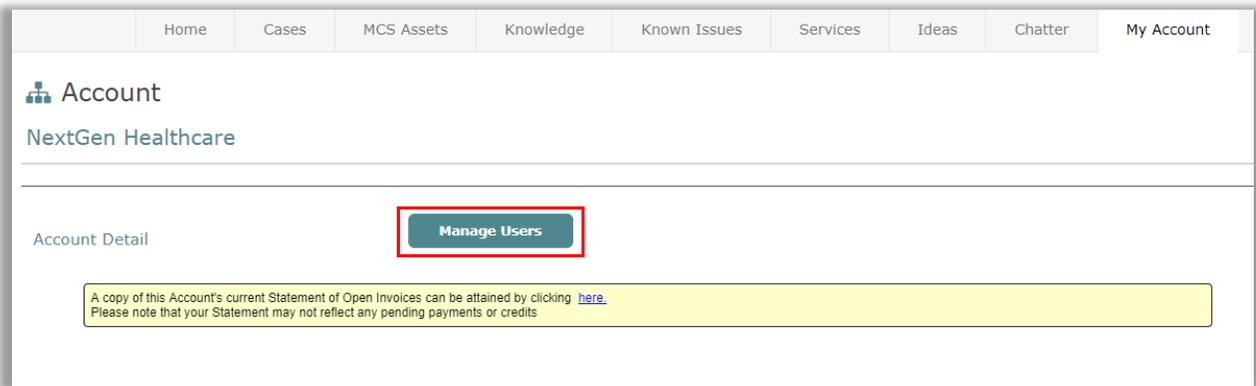


### Is This Role for You?

Main contacts should be reliable and accessible by their organization and may serve as a point of contact for important company updates. You 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 <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 view statement of open invoices.	X				X	
<b>CASES</b> View cases and case history.	X	X		X	X	X
Submit and manage cases.	X	X			X	X
<b>ASSETS</b> View hosting assets, manage users and access common forms.	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.	X	X	X	X	X	X
Link to known issues.	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 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**.

The screenshot shows the 'Manage Users' page. At the top, there is a search bar. Below it, the 'Active Users' section is visible. A red box highlights the 'New User' button. Below the button is a table with columns: First Name, Last Name, Email Address, Username, Profile, and Action.

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

The screenshot shows the 'New User' form. At the top, there is a 'Back to List' link. Below it, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. The form contains several fields: First Name, Last Name, Email, and Phone. There is a checkbox for 'No Longer at Account'. The 'Profile Permission' dropdown is set to 'NextGen Client Community User'. The 'Access to Applications' section has 'Available' and 'Selected' columns. The 'Preferred Method of Contact' dropdown is set to 'Email'. The 'Contact's Roles' section has 'Available' and 'Chosen' columns.

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. Three users are listed: Amanda Heidemann, Andrew Penney, and Chyrece Ferry. The 'Action' column for each user contains 'Edit', 'Reset Password', and 'Deactivate' buttons, with the 'Edit' button for Amanda and the 'Reset Password' button for Andrew and Chyrece 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	<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. 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, 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		<a href="#">Edit</a>	<a href="#">Activate</a>
	Test for release		<a href="#">Edit</a>	<a href="#">Activate</a>
	Jonas	ljones2@forefrontcorp.com.test	<a href="#">Edit</a>	<a href="#">Activate</a>
Adam	Baraka	abaraka@nextgen.com.test	<a href="#">Edit</a>	<a href="#">Activate</a>
Adam	Steinberg	asteinberg@rcm.nextgen.com.test	<a href="#">Edit</a>	<a href="#">Activate</a>

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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.

The screenshot shows a user profile management interface. At the top, there are input fields for 'First Name', 'Last Name', and 'Email'. Below these, there is a checkbox labeled 'No Longer at Account'. A 'Profile Permission' dropdown menu is set to 'NextGen Client Community User'. The 'Access to Applications' section shows a list of applications (ICD, NG Share, NG Store) with arrows indicating they can be moved between 'Available' and 'Selected' columns. The 'Preferred Method of Contact' is set to 'Email', and there is a 'Phone' input field. At the bottom, the 'Contact's Roles' section is highlighted with a red box. It features two columns: 'Available' and 'Chosen'. The 'Available' column contains a list of roles: Accounting Receiver, Clinician Receiver, IT Receiver, and License Key Receiver. Arrows between the columns allow for moving roles between them.

Choose from:

- **Accounting Receiver** – Contact who would handle any billing queries or 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 Receiver** – Non-clinical staff such as front office employees.
- **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 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.)