Mobile Community Getting Started Guide

NextGen Healthcare Success Community

www.community.nextgen.com

v.2
Updated 6.29.2020

Getting Started

Installing the App

The Success Community Mobile App is available for iOS and Android devices. Download the app from the Apple App Store or Google Play Store by clicking the links below or by searching "NextGen Success Community". *

* Available for NextGen Main Client Community Users and NextGen Client Community Users.

Logging In

Enter your existing Success Community username and password to log in. Once you have logged in, your credentials will be saved and you will not be required to enter them again.

Your username is typically your **email address plus .nextgen** on the end. For example:

Email Address: **john.doe@example.com**
Username: **john.doe@example.com.nextgen**

Password Resets

If you are unsure of your password, you can reset it using one of the options below.

1. Use the forgot password option on the Mobile Community login screen.

   Click on **Forgot Your Password.**
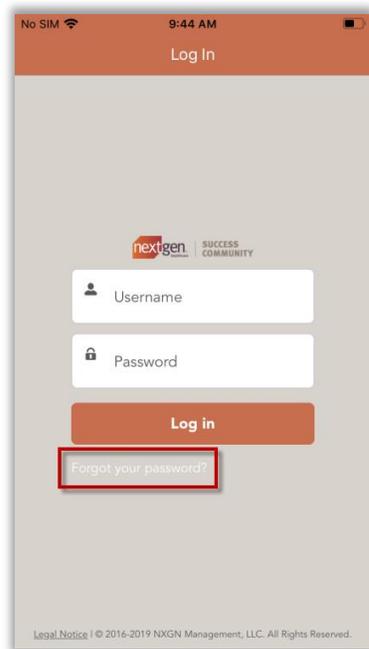
Enter your username. Click **Continue** and you will receive an email to reset your password. If you do not receive the email, please check your spam/junk folders and ensure that @nextgen.com is allowlisted.
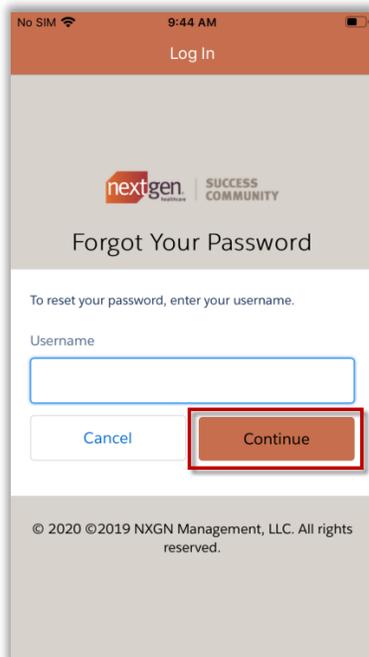
2. A Main Client Community User (Main Contact) can reset passwords for users at their practice from within the standard Success Community **My Account Tab**. Review the Main Client Community User Guide for more information.

Basic Navigation

Home Screen

On the home screen, you have access to global search, push notifications, and your profile settings.
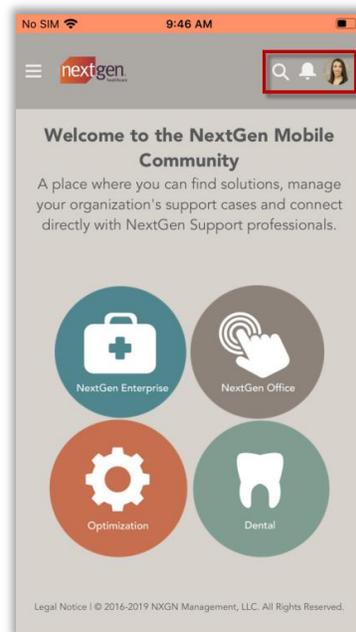
GLOBAL SEARCH
Global Search enables you to search the entire Mobile Community. Type in your search terms to view related chatter discussions, knowledge articles, and cases.

PUSH NOTIFICATIONS

You'll receive a push notification on your mobile device for each of the following scenarios.

- You are @mentioned in a chatter post.
- There is an update on one of your support cases.
- There is an update on a known issue or knowledge article you are following.

Click on the notifications icon within the app to view all your recent notifications.
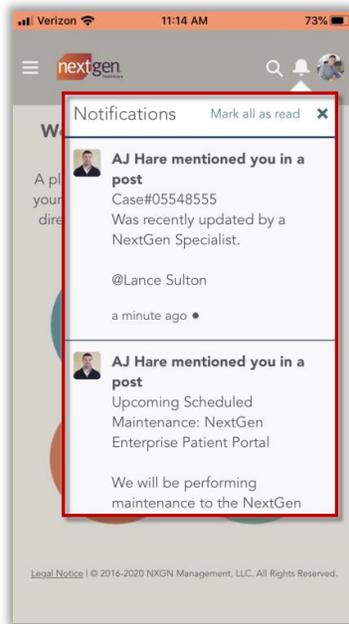
Your push notification settings for the Mobile Community can be managed in your device's notification settings.

PROFILE

From the profile icon, you can manage your settings (including email notification settings), view your direct messages, and log out.

Hamburger Menu

From the hamburger menu, you can view experiences, cases, known issues, dashboards, and chatter.
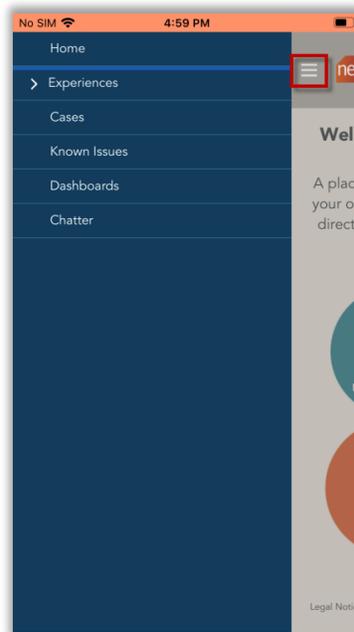
EXPERIENCES

Each experience is complete with information specific to that solution or group of solutions. Select an experience to be presented with knowledge articles, known issues, and chatter questions related to that specific solution.
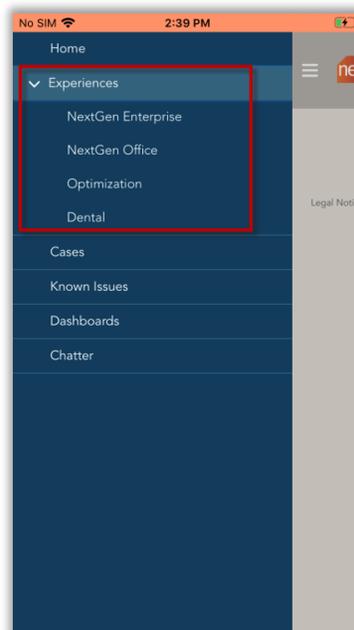
CASES

Cases will display in multiple list views depending on the case status and contact name. When you first select the cases menu option, you will see your open cases.

Use the dropdown to select one of the available list views. Review page 11 of the Cases Best Practice Guide for an overview of the list view descriptions.
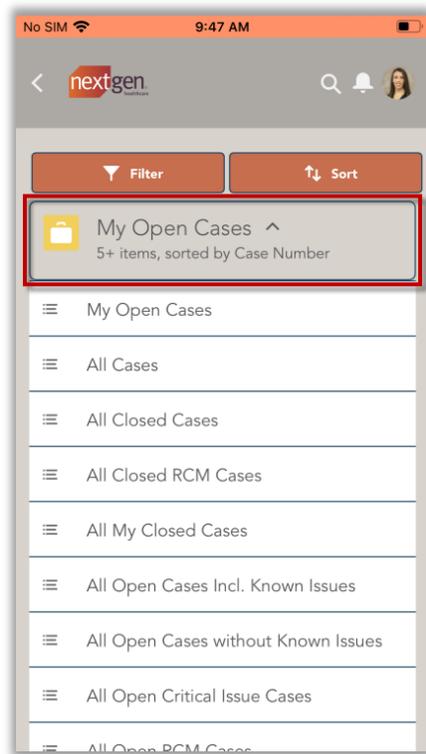
KNOWN ISSUES

Known issues will display in multiple list views depending on the status and found in version. When you first select the known issues menu option, you will see all open known issues.

Use the dropdown to select one of the available list views.
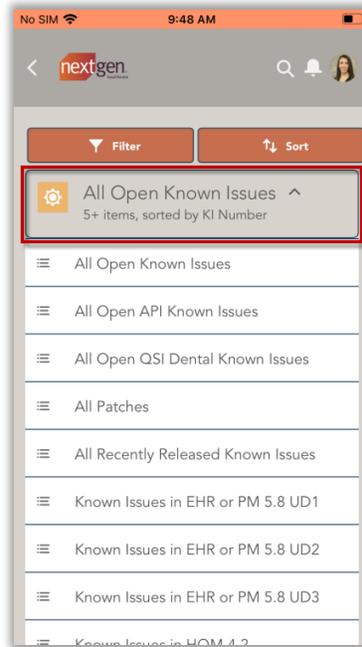
With the Mobile Community, you can now follow known issues. Open a known issue and click **Follow**. You'll receive a push notification on your device any time there is a status update on a known issue you are following.
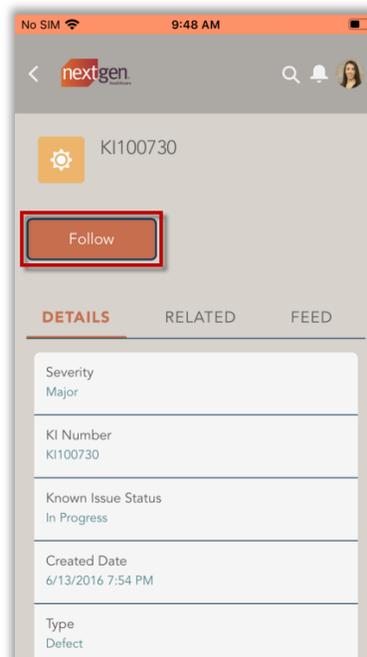
DASHBOARDS
Available to Main Client Community Users only.

Dashboards enable you to view key metrics on your organization's cases. Available dashboards include:

- Open Cases by Priority
- Open Cases by Status
- Aging Cases
- Cases Linked to a Known Issue
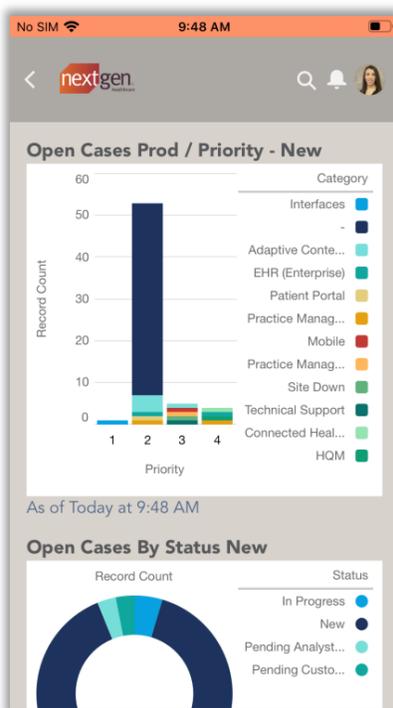
CHATTER
When you first select the chatter menu option, you will see your chatter feed. Your chatter feed displays chatter questions you have posted, chatter questions you were @mentioned in by another community member, and support cases that you have opened.

To post a new chatter question, click **Question**.
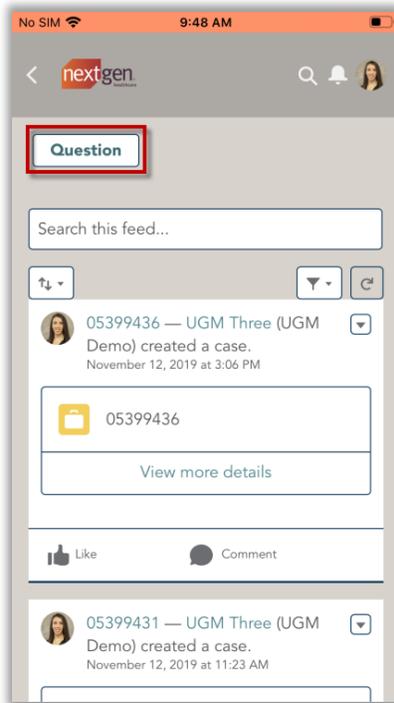
Type your inquiry in the Question field and include any additional information in the Details field.
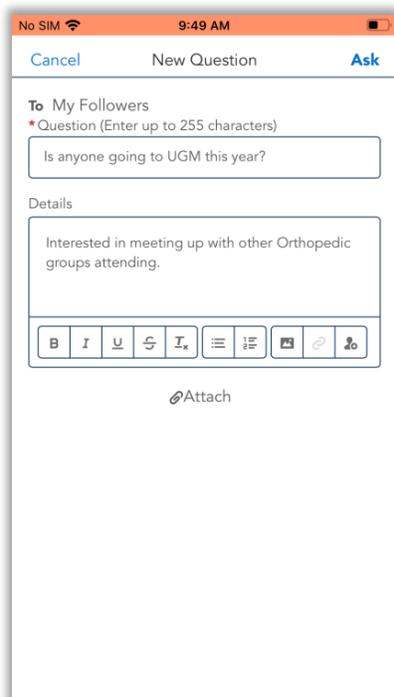
To post your question to a specific person or group, type the @ symbol, followed by the person or group's name. Then click **Ask**.
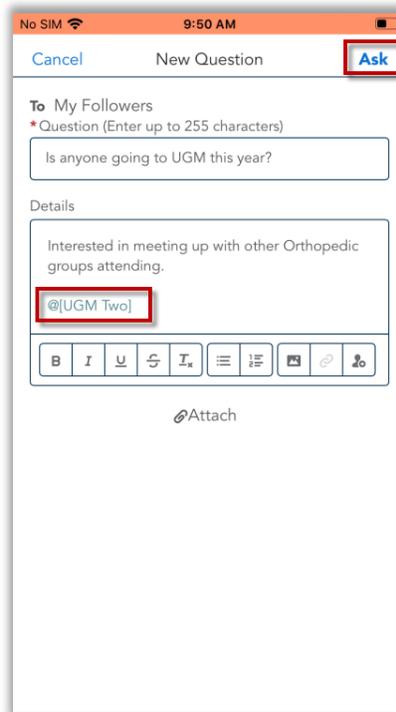
Managing Cases

Creating a New Case

From the home screen, select your Success Community experience.

Within the selected experience, select the Subtopic (also known as Category in the standard Success Community) your question or issue pertains to.
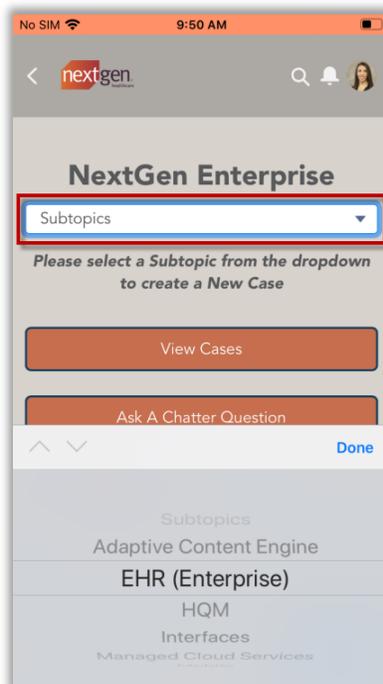
Once you've selected a Subtopic, you have the option to create a new case, view your existing cases, or ask a chatter question.

Prior to creating a new case, scroll down to view chatter discussions and knowledge articles related to your selected Subtopic to see if any may address your question or issue.
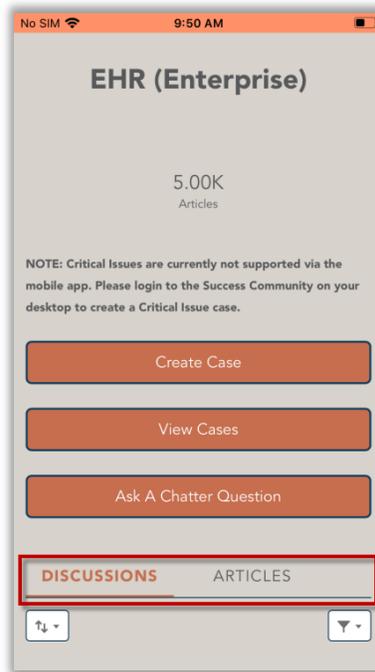
To proceed with creating a case, select **Create Case**.
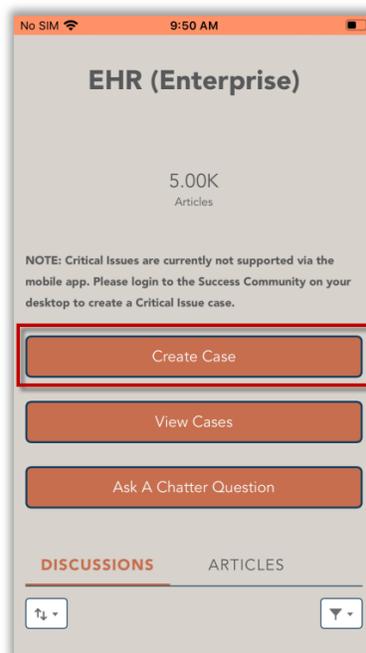
Type in your case Subject and Description. Then select a Severity, Topic, and Version from the picklist. Then click **Submit**. Review pages 5-6 of the Cases Best Practices Guide for a more detailed description of the fields on the case creation form.

Modifying an Existing Case

Once your case has been created, there are several actions you can take on it.

ADDING A CASE COMMENT
If you need to provide additional information to the case owner, you can add a comment on your case.

On the Case Details screen, scroll down to Case Comments and click the **down arrow**. Then click **New**.
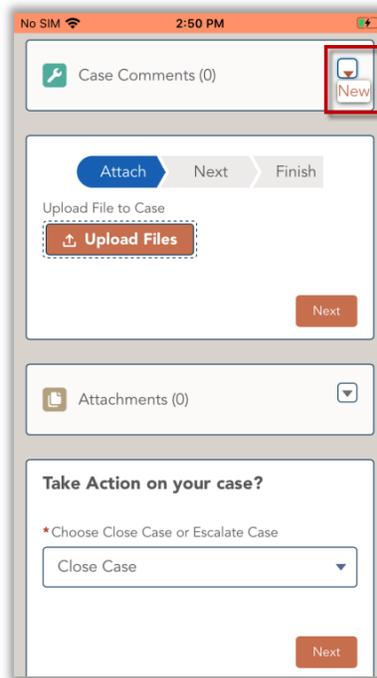
Type your comment in the Body field and click **Save**. The case owner will be alerted that you are waiting on them for an update.
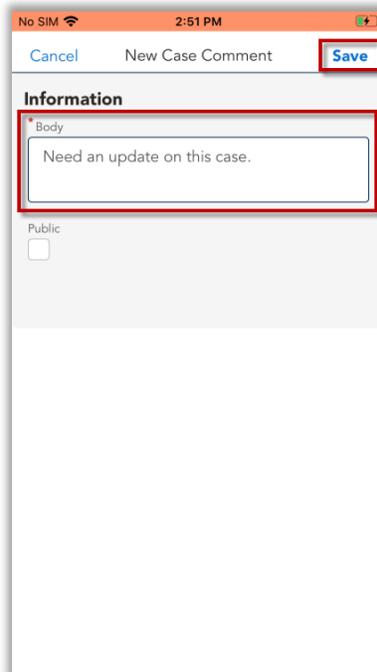
ADDING AN ATTACHMENT

If you have images, screenshots, or other documentation that you would like to add to your case, you can attach a file.

Click **Upload Files**. You have the option to take a photo, browse your photo library, or browse other files on your device.
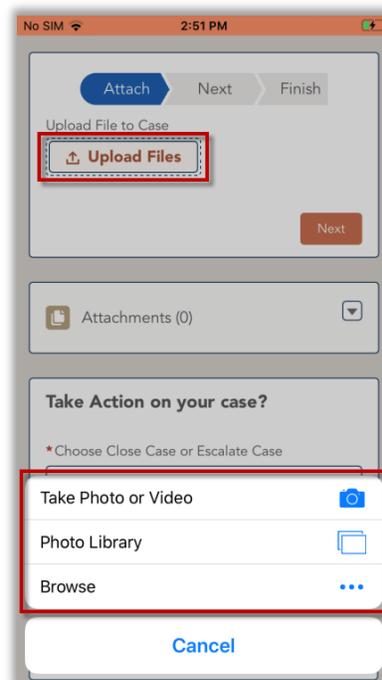

Select the file you wish to upload. Then click **Done**.
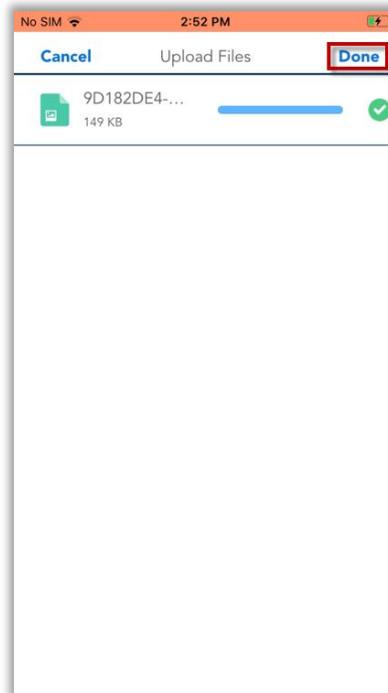
Click **Next** to confirm you've uploaded the correct file. Then click **Finish**.
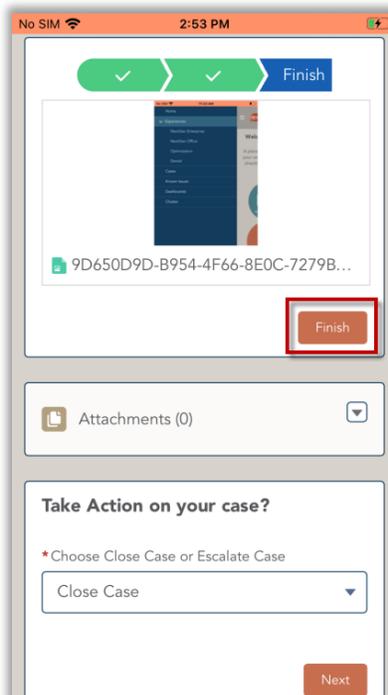
ESCALATING A CASE

If the level of urgency on one of your open cases has escalated, please feel free to utilize the Escalate option on your case.

Under "Take Action on your case?", choose **Escalate Case** from the dropdown. Then click **Next**.
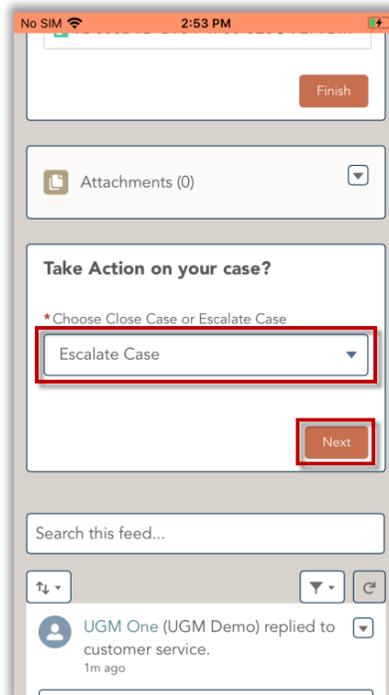
You will be prompted to provide an Escalation Reason. Then click **Next**.
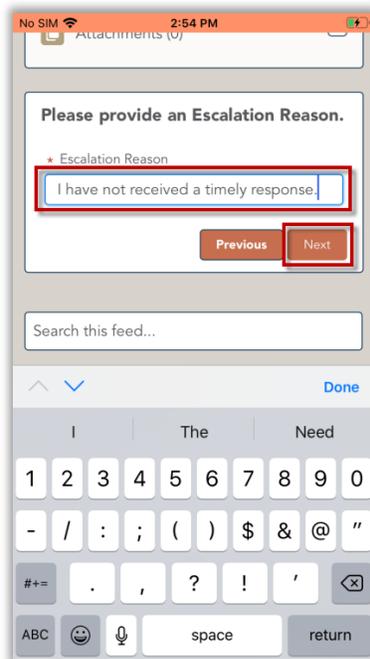
CLOSING A CASE

If you have resolved your case on your own and no longer need to work with Client Support, you can manually close your case.

Under "Take Action on your case?", choose **Close Case** from the dropdown. Then click **Next**.
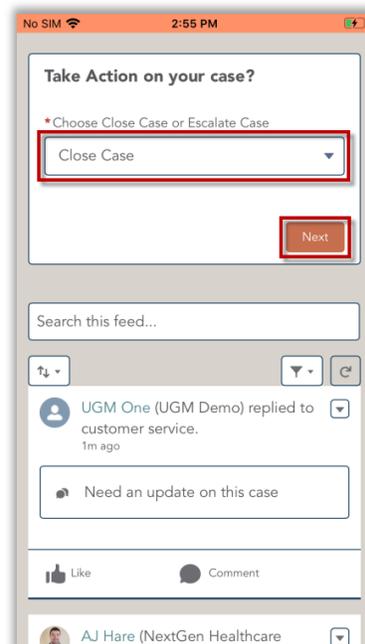
Toggle to confirm you want to close your case. Then click **Next**.
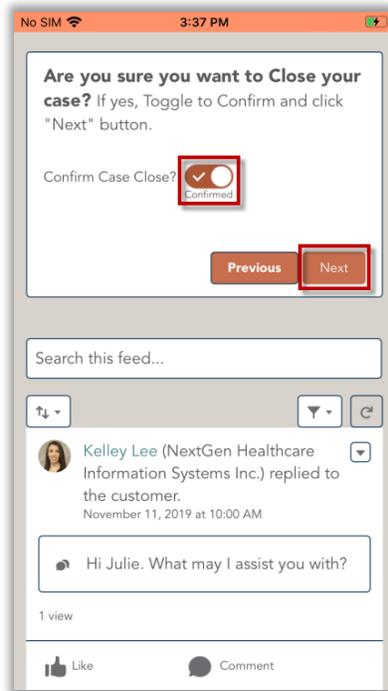
Live Chat

The Mobile Community enables you to chat with Client Support for certain common requests.

From the home screen, select your Success Community experience.

The chat widget appears in the lower right corner of your screen. Click **Chat**.
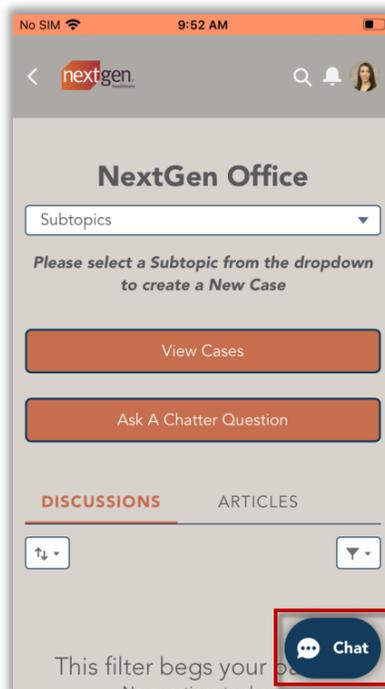
The pre-chat form displays. Enter your chat subject. Your first name, last name, and email will automatically populate. Then click **Start Chatting**.
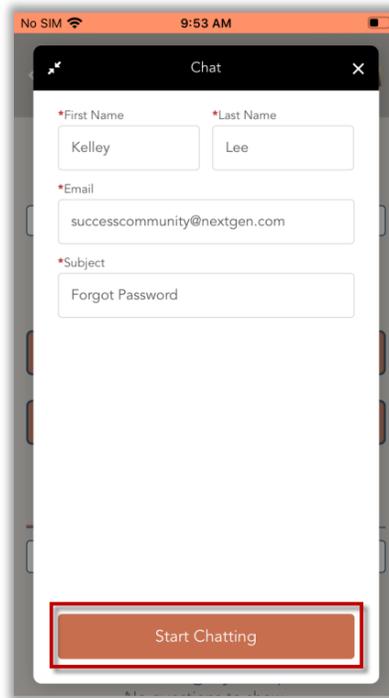
The chat widget will display the supported chat options based on the Success Community experience you have chosen. Select one of the chat options to initiate the chat.
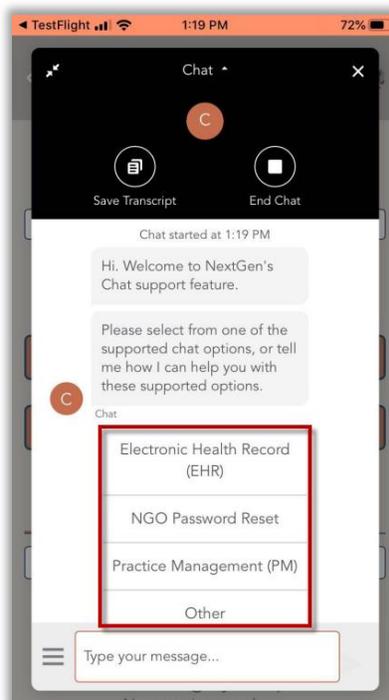
The system will walk you through a series of steps to try to address your question.
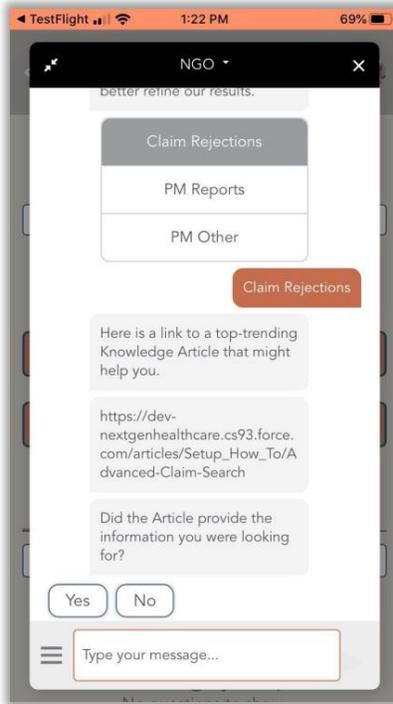
If your question is unable to be addressed, your chat will be routed to a live agent to further assist. Once an agent is available, your will receive a confirmation that "You're chatting with NextGen".
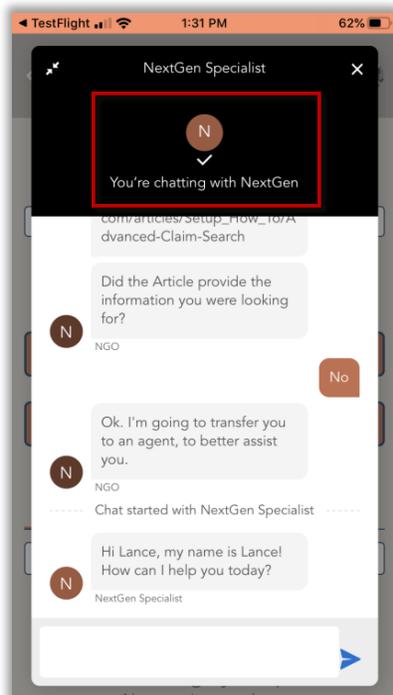
A support agent will begin interacting with you on the chat.
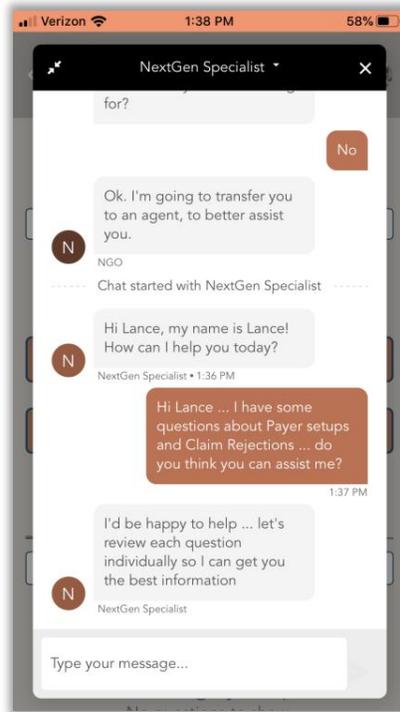
Once your question has been addressed, click in the top of the chat panel and select **End Chat** to end the session.
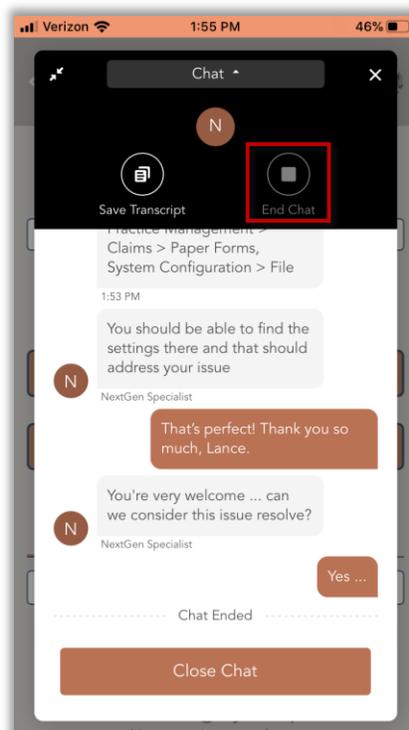
You can also save your chat transcript for future reference. To do so, click **Save Transcript**. Note that even if you do not save the transcript, each chat interaction is recorded in a support case.
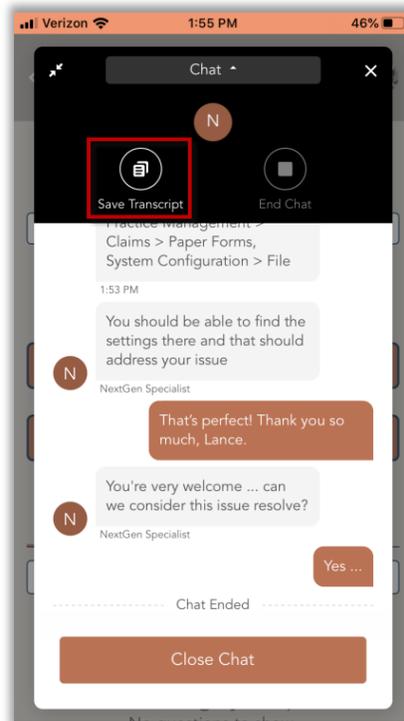
Then click **Confirm End Chat**.
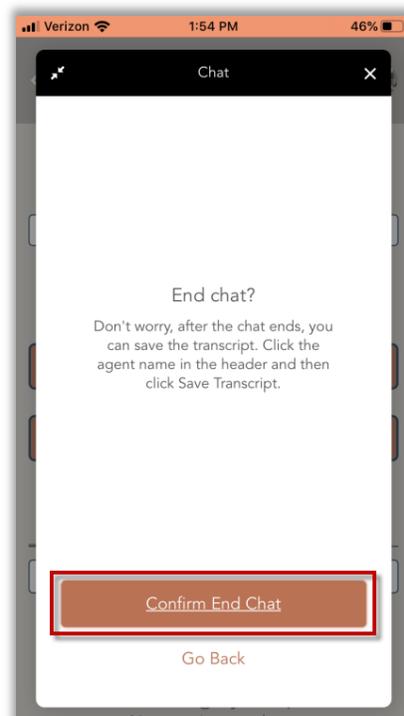
Frequently Asked Questions

Why am I able to log in to the standard Success Community, but not the Mobile App?

Because the Mobile Community offers case creation, it can only be accessed by NextGen Main Client Community Users and NextGen Client Community Users.

If you feel your Success Community profile should be updated, please contact your Main Client Community User (Main Contact).

Why am I unable to access Dashboards?

Dashboards are currently available to Main Client Community Users only.