

Mobile Community Getting Started Guide

NextGen Healthcare Success Community

www.community.nextgen.com

v.2 Updated 6.29.2020



GETTING STARTED	3
	2
INSTALLING THE APP LOGGING IN	3 3
Password Resets	3
	5
BASIC NAVIGATION	5
Home Screen	5
GLOBAL SEARCH	5
PUSH NOTIFICATIONS	6
PROFILE	7
HAMBURGER MENU	8
EXPERIENCES	8
CASES	9
KNOWN ISSUES	9
DASHBOARDS	11
CHATTER	11
MANAGING CASES	13
Creating a New Case	13
MODIFYING AN EXISTING CASE	16
Adding a case comment	16
Adding an attachment	18
ESCALATING A CASE	20
CLOSING A CASE	21
LIVE CHAT	22
FREQUENTLY ASKED QUESTIONS	28
WHY AM I ABLE TO LOG IN TO THE STANDARD SUCCESS COMMUNITY, BUT NOT THE MOBILE APP?	28
WHY AM I UNABLE TO ACCESS DASHBOARDS?	28



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.



No SIM 🗢	9:44 AM
	Log In
	nextgen success
	Username
é	
	Password
	Log in
	Log In
For	got your password?
_	
Legal Notice	© 2016-2019 NXGN Management, LLC. All Rights Reserved.

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.

No SIM 🗢	9:44 AM	
	Log In	
		r
For	got Your Passw	ord
To reset your	bassword, enter your userna	me.
Username		
Car	icel Cont	tinue
© 2020 © 20	019 NXGN Management, L reserved.	LC. All rights



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 <u>Main Client Community User</u> <u>Guide</u> 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

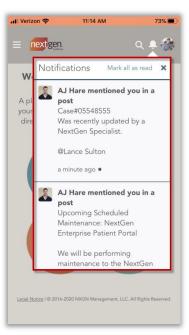
You'll receive a push notification on your mobile device for each of the following scenarios.

- 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.





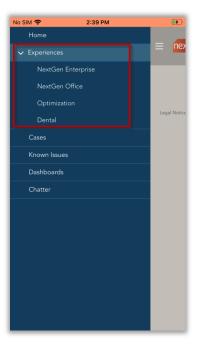
Hamburger Menu

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 <u>Cases Best Practice</u> <u>Guide</u> 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.

No SIM	ຈີ 9:48 AM ■⊃ີ Textigen_ ຊ. ມຸ
	▼ Filter 1 Sort
0	All Open Known Issues ^ 5+ items, sorted by KI Number
=	All Open Known Issues
=	All Open API Known Issues
=	All Open QSI Dental Known Issues
=	All Patches
=	All Recently Released Known Issues
=	Known Issues in EHR or PM 5.8 UD1
=	Known Issues in EHR or PM 5.8 UD2
=	Known Issues in EHR or PM 5.8 UD3
	Known Issues in HOM 4.2

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.

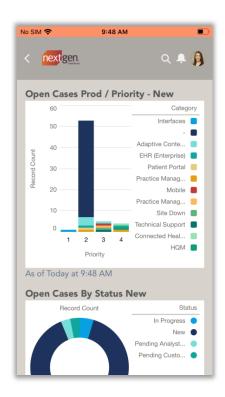
No SIM 🗢	9:48 AM	•
< nextgen	L.	Q 🐥 🚯
KI1	00730	
Follow		
DETAILS	RELATED	FEED
Severity Major		
KI Number KI100730		
Known Issue In Progress	Status	
Created Date 6/13/2016 7:5		
Type Defect		



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**.

No SIM 奈	9:48 AM
< ne	xtgen Q 🐥 😭
Que	stion
Searc	n this feed
↑ ↓ •	~ . C
ß	05399436 — UGM Three (UGM Demo) created a case. November 12, 2019 at 3:06 PM
C	05399436
	View more details
10	ike 🗭 Comment
•	05399431 — UGM Three (UGM Demo) created a case. November 12, 2019 at 11:23 AM

Type your inquiry in the Question field and include any additional information in the Details field.

No SIM 奈	9:49 AM	
Cancel	New Question	Ask
	llowers (Enter up to 255 characters) e going to UGM this year?	
Intereste	id in meeting up with other Orthope ittending.	edic
ВІ		20
	∂Attach	



To post your question to a specific person or group, type the @ symbol, followed by the person or group's name. Then click **Ask**.

No SIM 奈	9:50 AM
Cancel	New Question Ask
To My Folic * Question (E Is anyone of Details Interested groups att @(UGM Tv	owers nter up to 255 characters) going to UGM this year? in meeting up with other Orthopedic ending.

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.

No SIM 奈	9:50 AM	
< next	gen.	Q 🐥 🔒
Ne	extGen Ent	erprise
Subtopio	CS	•
Please se	lect a Subtopic fro to create a New	
	View Cases	
	Ask A Chatter Qu	estion
\sim		Done
A	Adaptive Conten	t Engine
	EHR (Enterp	rise)
	HQM	
	Interfaces	
	Managed Cloud S	



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.

No SIM 🗢	9:50 AM	D
EI	IR (Enterprise)	
	5.00K Articles	
mobile app. Ple	sues are currently not supported via the see login to the Success Community on your te a Critical Issue case.	
	Create Case]
	View Cases]
	Ask A Chatter Question]
DISCUSS	IONS ARTICLES	1
↑ ↓ •	T]

To proceed with creating a case, select Create Case.

No SIM 🗢	9:50 AM		
E	HR (Enterprise)		
	5.00K Articles		
NOTE: Critical Issues are currently not supported via the mobile app. Please login to the Success Community on your desktop to create a Critical Issue case.			
	Create Case		
	View Cases		



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 <u>Cases Best Practices Guide</u> for a more detailed description of the fields on the case creation form.

No SIM 🗢 9:51 AM	•
< nextgen Q 🐥 🛔)
*Subject	
Orders Module	
*Description	
Need help cancelling an order from the Orders Module.	
*Severity 1	
IMPORTANT (Priority 3)	•
Category	
EHR (Enterprise)	
Торіс	
EHR Orders Module	÷
Version	
5.9.2	÷
Submit	
Need Answers Fast? Find What You Need Here.	
NCP Certification: Frequently Asked Questions	

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**.



No SIM 🗢	2:50 PM	F
Case C	omments (0)	New
Atta	ch Next	Finish
Upload File to	Case	
<u>↑</u> Uploa		
		Next
Attachr	nents (0)	
Take Actio	n on your cas	e?
*Choose Clos	e Case or Escalate	Case
Close Case	e	•
		Next
		Next

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.

No SIM 奈	2:51 PM						
Cancel	New Case Comment	Save					
Informati	Information						
Body							
Need ar	update on this case.						
Public							



ADDING AN ATTACHMENT

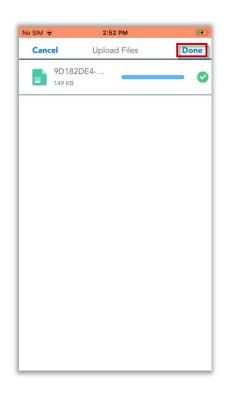
If you have images, screenshots, or other documentation that you would like to add to your case, you can attach a file.

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

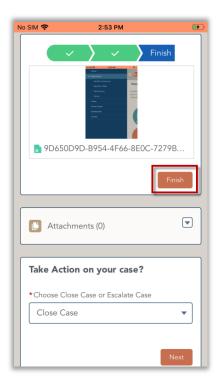
No SIM 🗢 2:51 PM	
Attach Next Finish	
Upload File to Case	
N	ext
Attachments (0)	•
Take Action on your case?	
*Choose Close Case or Escalate Case	_
Take Photo or Video	0
Photo Library	
Browse	
Cancel	

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.

No SIM 🗢 2:53 PM
Finish
Attachments (0)
Take Action on your case?
*Choose Close Case or Escalate Case
Escalate Case
Next
Search this feed
UGM One (UGM Demo) replied to customer service. Im ago

You will be prompted to provide an Escalation Reason. Then click Next.



No SIM 🗢 2:54 PM									
P	leas	e pro	ovide	e an	Esca	latio	n Re	ason	
_	e Esca	lation	Reaso	on					
	l hav	ve no	t rece	ived	a tim	ely re	spon	se.	
						revious		Next	
					Pr	evious		INEXt	
Se	arch	this fe	ed						
~	\sim							Do	one
	Т			TI	ne		1	leed	
1	2	3	4	5	6	7	8	9	0
-	1	:	;	()	\$	&	@	"
#+=			,		?	!	'		\bigotimes
ABC 😂 🖉 space return									

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**.

No SIM 🗢 2:55 PM 🕖
Take Action on your case?
* Choose Close Case or Escalate Case
Close Case
Next
Search this feed
Ť↓ • C'
UGM One (UGM Demo) replied to customer service. 1m ago
Need an update on this case
Like Comment
🕵 AJ Hare (NextGen Healthcare 🗨



Toggle to confirm you want to close your case. Then click Next.

No SIM	S 3:37 PM	•				
case	Are you sure you want to Close your case? If yes, Toggle to Confirm and click "Next" button.					
Confi	irm Case Close?					
	Previous					
Searc	h this feed					
ît •	.	C				
6	Kelley Lee (NextGen Healthcare Information Systems Inc.) replied to the customer. November 11, 2019 at 10:00 AM	•				
fig.	Hi Julie. What may I assist you with?					
1 view						
1	ike 🗩 Comment					

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.

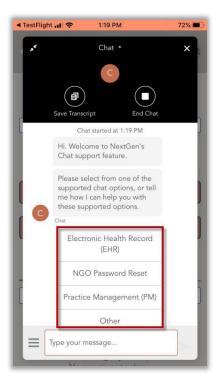
No SIM 奈	9:	52 AM	
< nex	tgen.		Q 单 🗿
	NextG	en Offi	ce
Subtop	ics		•
Please s	elect a Subto to create	pic from th a New Case	
	Viev	v Cases	
	Ask A Cha	tter Questio	n
DISCU	SSIONS	ARTICL	ES
↑ ↓ ~			T *
This	s filter be	gs your	Chat



The pre-chat form displays. Enter your chat subject. Your first name, last name, and email will automatically populate. Then click **Start Chatting**.

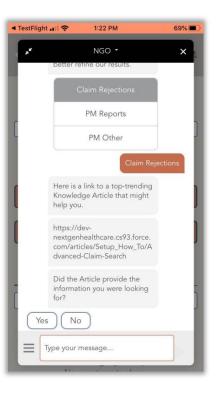
No S	IM 🗢 9:5	3 AM	
	, " С	hat X	
Γ	*First Name Kelley	*Last Name	1
	*Email		
	successcommunity@	nextgen.com]
	*Subject		
	Forgot Password		
(
[)
			I
ſ]
	-		
	Start C	Chatting	
	Nie wordt	and the second	

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.

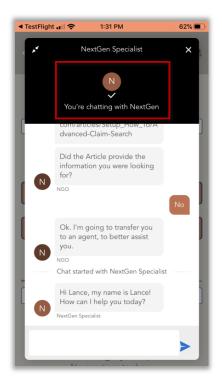




The system will walk you through a series of steps to try to address your question.



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".

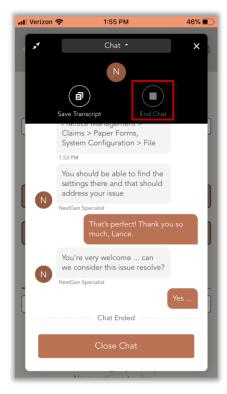




A support agent will begin interacting with you on the chat.

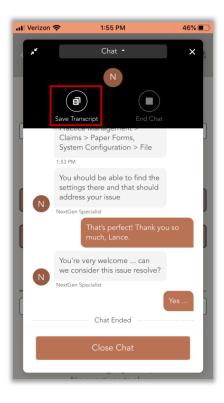


Once your question has been addressed, click in the top of the chat panel and select **End Chat** to end the session.





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.