# NextGen® Patient Portal User Guide

Version 5.8



Copyright © 1994-2013 NextGen Healthcare Information Systems, LLC. All Rights Reserved.

NextGen and NextPen are registered trademarks of QSI Management, LLC, an affiliate of NextGen Healthcare Information Systems, LLC. All other names and marks are the property of their respective owners.

Patent Pending.

Notice:

This document contains information that is confidential and proprietary to NextGen Healthcare and is intended for use solely by its authorized clients. This document may not be copied, reproduced, published, displayed, otherwise used, transmitted or distributed in any form by any means as a whole or in any part, nor may any of the information it contains be used or stored in any information retrieval system or media, translated into another language, or otherwise made available or used by anyone other than the authorized client to whom this document was originally delivered without the prior, written consent of NextGen Healthcare.

By retaining or using this document, you represent that you are a client or an authorized representative of a client of NextGen Healthcare who is authorized to use this document under one or more agreements between you and NextGen Healthcare now in force, and that you will use this document and the information it contains solely as and to the extent those agreements permit. Any other use or distribution of the contents of this document, as a whole or in any part, is prohibited.

Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Microsoft, SQL Server, Windows, Windows Vista, Internet Explorer, Office, Word, Excel and Outlook are registered trademarks of Microsoft Corporation in the United States and/or other countries. Although a Microsoft trademark may appear in certain images within this document, Microsoft Corporation is not responsible for warranty support on the NextGen® software products.

In as much as possible, default procedures in this guide were developed using the most current Microsoft operating system and most current Microsoft server operating system. When required, procedures in this guide were developed based on the Microsoft Windows 7 operating system and/or Windows Server 2008 and SQL Server 2008, unless otherwise noted. Screen shots in this document were primarily developed using the Windows 7, Windows Server 2008 and SQL Server 2008 systems. Note: Other Windows operating systems that support this product may work differently.

All other names and marks are the property of their respective owners.

The examples contained within this publication are strictly present to show functionality of the software and are not intended to be guidelines for medical decisions or clinical approaches.

Although NextGen Healthcare provides accurate documentation at the time of publication, it cannot guarantee going forward that Web site links to third-party vendors listed in this document do not become obsolete. NextGen Healthcare is not responsible for the contents of any such linked sites or any link contained in a link site, or any changes or updates to such sites. The inclusion of any link does not imply endorsement by NextGen Healthcare of the site and is solely being provided to you as a convenience. Use of any such linked Web site is at the user's own risk.

Although we have exercised great care in creating this publication, NextGen Healthcare Information Systems, LLC assumes no responsibility for errors or omissions that may appear in this publication and reserves the right to change this publication at any time without notice.

Notice:

The following are all registered trademarks or trademarks of NextGen Healthcare Information Systems, LLC:

- NextGen® Ambulatory EHR
- NextGen® Dashboard
- NextGen® EHR Connect

- Insight Reporting<sup>TM</sup>
- NextGen® HIE
- NextGen® HQM

- NextGen® KBM
- NextGen® Mobile
- NextGen® Patient Portal

> NextPen®

- NextGen® Appointment Scheduling
- NextGen® Billing Services Management

- NextGen® CHC Reporting Module
- NextGen® Document Management
- NextGen® Optical Management

- NextGen® Population Health
- NextGen® Practice Management
- NextGen® Real Time Services

NextGen® Remote Patient Chart Synchronization

The following terms may be used interchangeably throughout this document:

- NextGen Ambulatory EHR and NextGen EHR
- NextGen Practice Management and NextGen EPM
- NextGen Optical Management and NextGen Optik
- NextGen Document Management and NextGen ICS
- NextGen Patient Portal and NextMD
- NextGen Remote Patient Chart Synchronization and NextGen PatientSync
- > NextGen Real Time Services and NextGen Real-time Transaction Server
- NextGen CHS and NextGen HIE

# **Document Revision History**

App Version	Build Number	Date	Document Version	Summary of Changes
5.8	5.8.0.104	09/12/2013	2.0	General Release
5.8	5.8.0.99	07/25/2013	1.0	Initial Release

# **Contents**

Chapter 1 Introduction	9
Overview	9
Web Browser Requirements	
Internet Security	10
Email Notifications	10
Chapter 2 NextGen Patient Portal Enrollment	13
Enrolling in NextGen Patient Portal	13
Chapter 3 NextGen Patient Portal Web Account Access	17
Logging On to Your NextGen Patient Portal Account	17
Contents Pane	19
Practice Headers	20
Navigation Pane	20
Showing/Hiding the Navigation Pane	22
Locked Accounts	22
Logging Out of Your NextGen Patient Portal Account	23
User Name and Password Recovery	
Resetting Your Password	23
Recovering Your User Name	
Resetting Password with Reset Token	
Creating a New Password	
Chapter 4 Home Page	29
Alerts and Appointment Reminders	29
My Appointments	
My Medical Record	31
Chapter 5 Mail	33
Inbox	33
Accessing Inbox items	
Replying to Messages	34
Viewing Documents	36
Viewing Personal Health Records	37
Transmitting Personal Health Record	
Viewing Audit History	
Previewing Personal Health Records	
Saving Personal Health Record as XML	
Downloading and Saving Personal Health Records	
Submitting a Template	

Submitting an Interactive Medical Form	45
Deleting Inbox Items	
Printing a Message	47
Sent Items	
Accessing Sent Items	
Deleting Sent Items	
Chapter 6 Tasks	51
Composing Messages	51
Viewing Statements	
Making Payments	
Requesting Personal Health Records	
Appointments	
Starting an Appointment Request	
Submitting an Appointment Request	
Booking an Appointment	
Rescheduling a Booked Appointment	
Cancelling a Booked Appointment	
Accepting a Pending Appointment Request	
Sending a New Appointment Request from Pending Requests	
Cancelling an Appointment Request	
Deleting a Pending Appointment Request	
Renewing Medications	
Selecting Your Medical Practice	
Selecting Your Medication	
Selecting Your Pharmacy	
Submitting Your Request	
Research Center	
Chantar 7 My Account	75
Chapter 7 My Account Account Settings	<u>75</u>
Changing Your User Name	
8 8	
8 8	
Changing Your Security Question	
Changing Your Forgotten Password Question	
<u>e</u>	
My Information	
Managing Your Addresses	
Managing Your E-mail Addresses	
Managing Your Phone Numbers	
Managing User Grants	
Managing Care Manager Accounts	
Managing Dependent Accounts	
Managing Practices	
Enrolling to Practices in the same Enterprise	
Confirming Pending Enrollment Requests	91

Enrolling in another Practice	92
Un-enrolling from the NextGen Patient Portal	
Managing Statement Notifications	
Index	95

Page 7 of 96

This page is intentionally left blank.

## CHAPTER 1

# Introduction

This NextGen Patient Portal Patient User Guide explains how to use the features and functions found on NextGen Patient Portal.

The intended users of this guide are patients enrolled to use NextGen Patient Portal.

This guide assumes that you have a basic understanding of computers and computer terminology and the Internet.

This section provides an overview of NextGen Patient Portal, requirements, and other related information.

## **Overview**

The NextGen Patient Portal is a consumer-oriented healthcare website that provides you with a fast, reliable and an easy-to-use method of communicating with your medical service provider. With NextGen Patient Portal, you can connect with your doctor through a convenient, safe and secure environment to:

- > Enroll with multiple practices
- Request, book (real-time) and/or cancel appointments
- Request medication renewals
- Send and receive secure messages to and from your provider
- Complete, submit and review online forms
- Complete, submit and view Instant Medical History forms
- Request Personal Health Records (PHRs)
- Receive and review documents
- Receive and review patient education material
- Update account information
- View statements online
- Make payments online

Note: Because practices can customize NextGen Patient Portal to meet their requirements, some of the features listed above and described throughout this document may not be available in your NextGen Patient Portal account.

## Web Browser Requirements

NextGen Patient Portal works best with the following browsers that come with 128-bit Secure Sockets Layer (SSL) encryption:

- Microsoft® Internet Explorer 6.0 and higher
- Mozilla Firefox® 2.0 and higher

Note: NextGen Patient Portal also supports Google Chrome and Opera.

Most browsers, which are currently available, support 128-bit SSL encryption (which is a way of making information secure). To determine if your browser supports 128-bit encryption, click Help on your browser's menu bar, and then select About. If your browser does not support 128-bit encryption, please visit the respective company website that provides upgrades to your browser software.

## Internet Security

Here are some suggestions to help protect your privacy and keep your information secure:

- Select a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive, must be between six and 20 characters, and can include numbers and special characters.
- Some Web browsers prompt you to save user names and passwords for various sites on the Internet. This feature can be useful, but can put your personal information at risk. If possible, you should disable this option so no one can log in to your account.
- If you use a public or shared computer, it's important that you always sign out completely at the end of each session by clicking the Logout option. Logging out shall make it impossible for any other person (using the same system) who is trying to view the contents of your account. Wherever possible, delete the Web browser's cache and cookies. The cache maintains a copy of web pages that have been viewed recently.
- > Because computers are vulnerable to viruses or online attacks that seek to intercept sensitive information provided through the Internet, your computer should have an up-to-date antivirus program and make use of a firewall.
- You should not leave your system unattended while logged in to NextGen Patient Portal. If you have to leave your system unattended, log out of all programs and close all the open windows that might display sensitive information. NextGen Patient Portal automatically logs you out if there has been no online activity for 20 minutes.

## **Email Notifications**

Anytime the practice sends emails, responds to requests or uploads documents or forms to your NextGen Patient Portal account, an email notification is sent to your email address. Email notifications are also sent if your practice locks or unlocks your account.

Spam blocking software used by email providers such as AOL and NetZero can block legitimate emails. To ensure that you are receiving NextGen Patient Portal emails, add nextmd.com to your contact list, address list, or "Do Not Block" list. If you are using your own spam filtering software, make sure you are not filtering out email from nextmd.com.

This page is intentionally left blank.

### CHAPTER 2

# NextGen Patient Portal Enrollment

The enrollment process is a means of signing up for your NextGen Patient Portal account which provides access to your personal and medical information on the NextGen Patient Portal website.

## Enrolling in NextGen Patient Portal

You must first contact your practice to enroll in NextGen Patient Portal and provide them with your name, address, phone number and email address. The practice will send you an email that contains a link to their NextGen Patient Portal website.

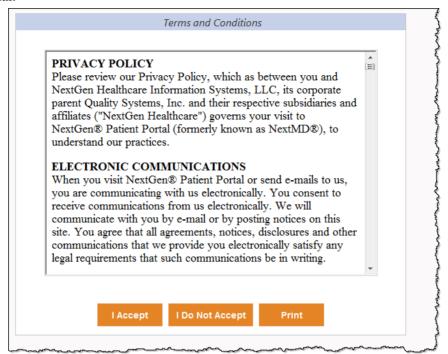
The practice will also provide you an eight-digit token number to access your NextGen Patient Portal account. The token number is valid for 30 days. If you do not enroll in NextGen Patient Portal within this period, contact your practice to obtain a new token number.

Note: If you already have a NextGen Patient Portal account in a practice and want to enroll in another practice in the same enterprise, refer to the procedure to enroll in multiple practices (see "Enrolling to Practices in the same Enterprise" on page 90). If you already have a NextGen Patient Portal account for a practice and try to access NextGen Patient Portal website with the reset password link provided by the practice, you will be redirected to the *Password Reset* page (see "Resetting Your Password" on page 23).

### To enroll in NextGen Patient Portal:

1 Open the *Welcome to NextGen Patient Portal!* email sent from the practice and click the Click here to go to NextGen Patient Portal link.

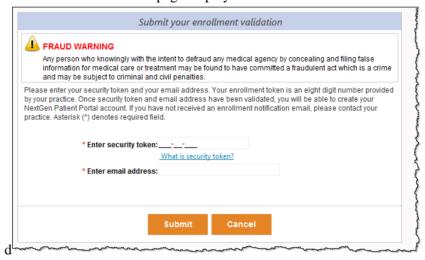
The link opens in the default browser and displays the terms and conditions for using NextGen Patient Portal.



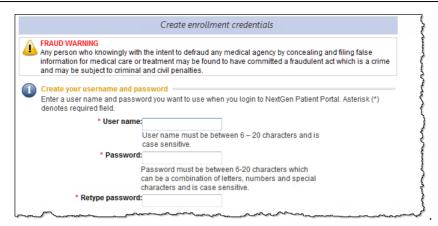
2 Read the terms and conditions and click | Accept to begin the enrollment process.

Note: If you click I Do Not Accept, the My Health Login page displays.

The Submit your enrollment validation page displays.



- **3** Enter your security token number (without dashes) and your email address in the fields provided and then click **Submit**.
  - The Create enrollment credential page displays.
- 4 In the Create your username and password section, enter the NextGen Patient Portal user name and password, and then re-enter your password in the fields provided.



All fields are required. User names and passwords are case sensitive and must be between six and 20 characters. Passwords must contain at least one number.

Use mixed-case letters, numbers and special characters to increase the password strength.

5 In the Create your login security authorization section, select a security question and then enter and retype your answer in the fields provided. The question and answer is part of your login procedure to access the NextGen Patient Portal.



In the Create your password recovery credentials section, enter a question and answer that you will use to reset your password and then and then retype your answer in the fields provided.



7 Click Submit to complete the enrollment process and start using your NextGen Patient Portal account.

Welcome: John Doe, Last logged in: 9/20/2013 2:57:09 PM | Logout Home My Practices Research Center | My Appointments | My Medical Record My Appointments My Medical Record NextGen Medical Practice Collapse Appointment Reminders (0 Items) Expand Expand <u>Inbox</u> **T** Contact Welcome to NextMD !!!! Information Sent Items http://www.nextgen.com info@nextgen.com 🔀 Compose Message You have (1) new items, click here to view 🍪 Pay Statements Renew Medication 🚃 Request Appointment 🔀 Request Health Record Research Center Account Settings My Information Manage Practices Statement Notifications

Your *NextGen Patient Portal Account page* displays. It consists of two main elements: a navigation pane (on the left) and a contents pane (on the right).

Tip: For easier access next time, add the NextGen Patient Portal website to your Favorites list.

## CHAPTER 3

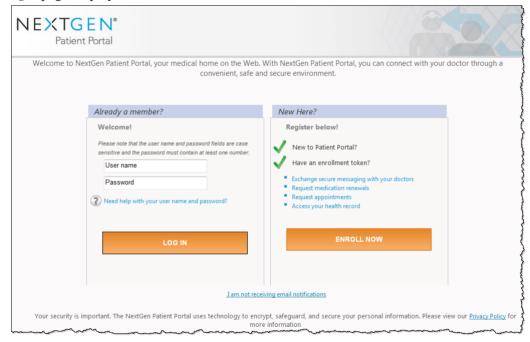
# NextGen Patient Portal Web Account Access

After you have successfully enrolled in NextGen Patient Portal, you can access your NextGen Patient Portal account.

# Logging On to Your NextGen Patient Portal Account

### To log on to your NextGen Patient Portal account:

1 Access the NextGen Patient Portal website. The *Login* page displays.



**Note**: Based on your practice, the *Login* page might be customized to appear with a different theme.

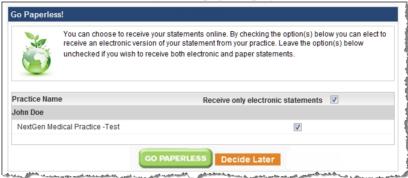
- **2** Enter your User Name and Password in the fields provided.
- 3 Click Log In.

Note: Both the user name and password are case sensitive. If you fail to log on to your NextGen Patient Portal account after four times with an incorrect password, the system locks your account. The system automatically unlocks your account after 20 minutes.

The Answer Your Security Question page displays.



- 4 Enter the requested security information, and then click Submit.
  - If you are enrolled to multiple practices in the same enterprise, the *Add new practices* page displays (see "Enrolling to Practices in the same Enterprise" on page 90).
  - If a practice in which you are currently enrolled decides to provide you an option to receive only electronic statements, the *Go Paperless!* page displays.



To receive only electronic statements, click **Go Paperless**. Otherwise click **Decide Later**. You can enable this option later (see "Managing Statement Notifications" on page 94).

Your NextGen Patient Portal account displays. It consists of two main elements:

- A navigation pane (on the left)
- > A contents pane (on the right)

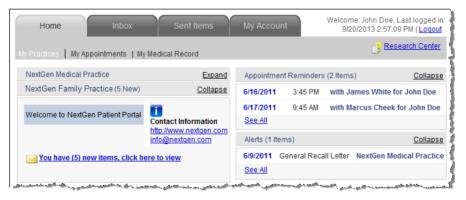


Your logged in name appears in the top right corner along with the last logged in time.

**Note**: If you leave the page inactive for a set amount of time, a message indicating that the session will expire displays. Click **Continue** to extend the session.

## Contents Pane

The NextGen Patient Portal website contains a Contents pane on the right side that enables you to access all the pages in the NextGen Patient Portal website using the tabs and links located at the top of each page.



The tabs are organized into the following categories.

### **Home**

By default, this tab is displayed when you successfully log on to the NextGen Patient Portal website. It displays a link for new items in the Inbox, contact information alerts and appointment reminders for each of the practices in which you are enrolled. You can also click links to view your appointments and medical health record.

### Inbox

Select this tab to view all the items (messages, documents, statements, etc.) that you received from your practice(s).

In addition, you can click the links to send messages to your practice(s), view statement, make payments online, generate Personal Health Records, request and book appointments, and view patient education material.

#### Sent Items

Select this tab to view all the items (messages, documents, statements, etc.) that you sent to your practice(s).

In addition, you can click the links to send messages to your practice(s), view statement, make payments online, generate Personal Health Records, request and book appointments, and view patient education material.

## My Account

Select this tab to manage your NextGen Patient Portal account information. You can click links to update your account information, update your personal information (name, address, email, etc.), change the rights other accounts have to your NextGen Patient Portal account and enroll in additional practices.

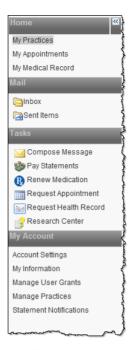
## **Practice Headers**

When you receive new messages or items from a practice, they appear under the practice header along with the practice's contact information. The header also Includes the practice name and the number of new items in Inbox. If you are enrolled in multiple practices, a header for each practice and any corresponding information displays. You can show or hide this information as needed by clicking the Expand and Collapse links that appear next to the practice name.



# **Navigation Pane**

The NextGen Patient Portal website contains a navigation pane on the left side that enables you to access all the pages on the website.



The links are grouped by functionality into the following categories:

### **Home**

Enables you to access alerts and appointment reminders for each of the practices where you are enrolled. You can also click links to view your appointments and medical health record.

#### Mail

Enables you to view all messages and items received from practices, and view all messages and items that you sent to practices.

## **Tasks**

Enables you to compose messages, pay statements, request appointments, renew medications, request personal health records and research medical topics.

## My Account

Enables you to set up and manage NextGen Patient Portal account information, personal information, change the rights other accounts have to your NextGen Patient Portal account and enroll in additional practices using the security token provided by those practices.

## Showing/Hiding the Navigation Pane

Because of the dual Web navigation controls, you can hide the Navigation pane to simplify the interface.

In the top-right corner of the on the Navigation pane there is a double arrow icon that enables you to show or hide the Navigation pane. By default, the Navigation pane displays.

Icon	Function
>>	Click this icon to show the Navigation pane
~	Click this icon to hide the Navigation pane

## **Locked Accounts**

You cannot access your NextGen Patient Portal account:

- If you fail to log in to your NextGen Patient Portal account with four continuous failed attempts (with an incorrect password), the system locks your account. However, the system automatically unlocks your account after 20 minutes.
- If the practice locks your account, you receive an email stating that you need to contact the practice to unlock your account. When the practice unlocks the account, you receive another email stating that the account has been unlocked. If you try to log on to your NextGen Patient Portal account when your account is locked, you cannot access any of the mails or tasks (except for Research Center).



# Logging Out of Your NextGen Patient Portal Account

To log out of your NextGen Patient Portal account, click the Logout link at the top of the page.



If NextGen Patient Portal does not detect any activity for more than 20 minutes, the system automatically logs you out.

Recommendation: NextGen Healthcare recommends that you log out before exiting the NextGen Patient Portal website. Properly logging out of the website provides better security for you, as well as your medical records.

## User Name and Password Recovery

You can reset your password using:

- Your user name and forgot password answer
- Your demographic information
- Your reset token and email address

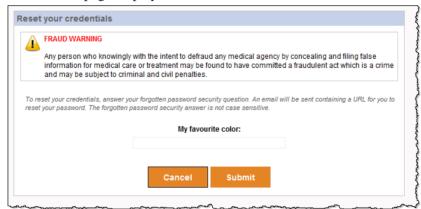
## Resetting Your Password

To reset your password using your user name:

- 1 Access the NextGen Patient Portal website. The *Login* page displays.
- **2** Click the Need help with your user name and password? link. The *Forgot your Login information?* page displays.



- **3** If you know your user name and answer to the forgot password question, select the I have my user name option.
- **4** Enter your User Name, and click Next. The *Reset your credentials* page displays.



5 Enter your answer to the forgot password question, and click Submit.

A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 26).

## Recovering Your User Name

## To reset your password with your demographic information:

- 1 Access the NextGen Patient Portal website. The *Login* page displays.
- 2 Click the Need help with your user name and password? link.

The Forgot your Login information? page displays.



- **3** Enter the following information:
  - First Name
  - Last Name
  - Email address
  - Date of Birth
  - Zip

**Note**: You can recover the user name and password only if the information you enter matches the information in the NextGen Patient Portal records. All fields are mandatory.

4 Click Next.

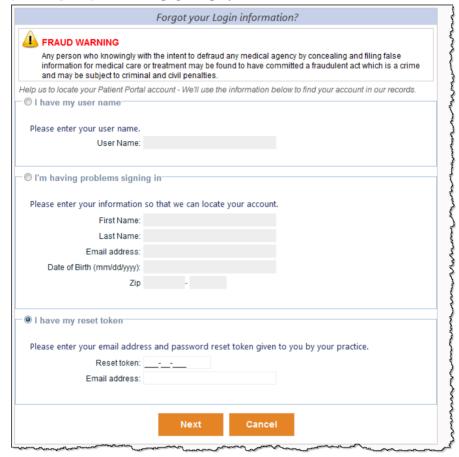
A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 26).

## Resetting Password with Reset Token

## To reset your password using a reset token:

- 1 Access the NextGen Patient Portal website. The *Login* page displays.
- **2** Click the Need help with your user name and password? link.

The Forgot your Login information? page displays.



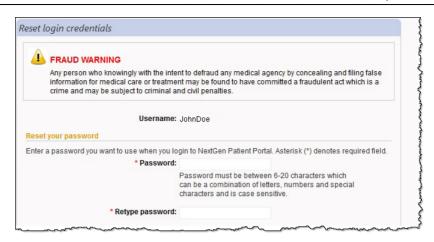
- **3** Enter the Reset token obtained from the practice.
- 4 Enter your Email address.
- 5 Click Next.

A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 26).

## Creating a New Password

### To create a new password:

1 In your email application, open the Password Reset email and click the Forgot Password link. The *Reset login credentials* page opens and displays your user name.



- 2 In the Reset your password section, enter then retype your new password in the fields provided. All fields are required. Passwords are case sensitive and must be between six and 20 characters. Use mixed-case letters, numbers, and special characters to increase the password strength.
- 3 Scroll to the Reset your login security authorization section.

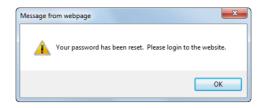


- **4** Select a security question and then enter and retype your answer in the fields provided. The question and answer is part of your login procedure to access the NextGen Patient Portal.
- **5** Scroll to the Reset your password recovery credentials section.
- **6** Enter a question and answer and then retype your answer in the fields provided to enable to you to reset your password.



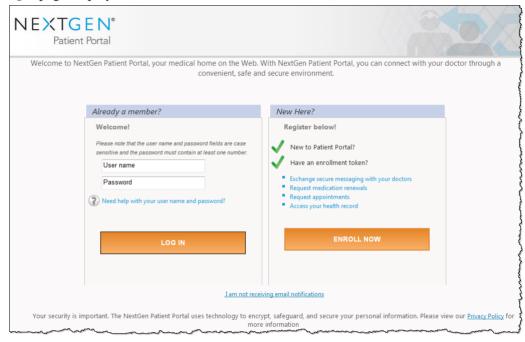
7 Click Submit.

A message displays indicating that your password has been reset.



8 Click OK to continue.

The Login page displays.



**9** Log in using your user name and the new password.

## CHAPTER 4

# Home Page

The Home page is the first page you see when you successfully log into the NextGen Patient Portal website. It displays contact information, alerts and appointment reminders for the practices where you are enrolled. You can click links to view new items, view your appointments, and view and export your most recent personal health record.

**Note**: If your NextGen Patient Portal Web account is locked by the practice, the appointment reminders for the corresponding practice is NOT displayed.

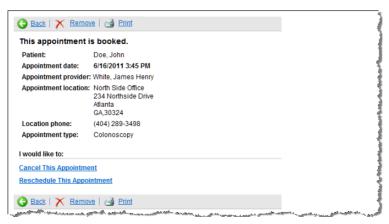
# Alerts and Appointment Reminders

Your practice can send you alerts and appointment reminders that appear on the Home page.



**Note**: If your NextGen Patient Portal Web account is locked by the practice, the appointment reminders for the corresponding practice is NOT displayed.

Appointments scheduled within the next seven days appear in the **Appointment Reminders** section. Click on a reminder to view the details. Click **See All** to view all appointments (see "Appointments" on page 57).



Event notices or events (such as yearly exams or upcoming lab tests) appear in the Alerts section. Click on an alert to view the details. Click See All to view all documents in the Inbox (see "Accessing Inbox items" on page 33).



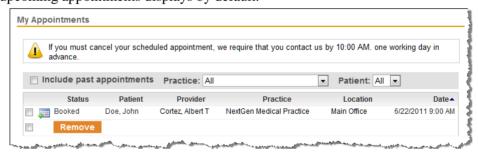
You can show or hide the Appointment Reminders and/or Alerts sections as needed by clicking the corresponding Expand and Collapse links that appear next to each header.

# My Appointments

Use the My Appointments feature to review current and past appointments for either yourself and/or any dependents.

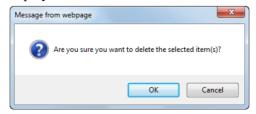
### To use the My Appointments feature:

1 From either the Home page or navigation pane, click the My Appointments link. A list of upcoming appointments displays by default.



- 2 To refine the number of items displayed, use the Practice and Patient drop-down lists.
- 3 To view previous appointments, select the **Include past appointments** check box.
- **4** Click a column name (Status, Patient, Provider, etc.) to sort the list in ascending or descending order.
- 5 To navigate to other pages, click the page number (if available) at the bottom right of the page.
- **6** Click an appointment to view the details.
- **7** To delete appointments from the list:
  - > Select either the check box next to each appointment you want to remove or select the check box next to the Delete button to remove all items.
  - Click Delete.

A confirmation message displays.



Click **OK** to delete the item.

# My Medical Record

A Personal Health Record (PHR) is an electronic summary of your health and medical history (allergies, medications, family history, etc.) that you can request from a practice. When you receive your PHR, you can view it and save it to a storage device such as a CD, smart card, or USB flash drive.

## To view and export your most recent personal health record:

1 From either the Home page or navigation pane, click the My Medical Record link. The *Request Personal Health* form displays.

If you have not requested a health record before, you can submit a request (see "Tasks" on page 51). Otherwise, the form displays the clinical history from your last request.



- **2** If needed, select a person/practice from the Select Patient list.
- **3** Select a category (such as Demographic Info, Medications, Allergies, etc.) to view additional information.

This page is intentionally left blank.

## CHAPTER 5

# Mail

This chapter explains how to use the Inbox page which displays all incoming items and the Sent Items page which displays all outgoing items.

## Inbox

The Inbox displays all incoming items from all practices in which you are enrolled including those of guardians. You can access incoming messages, documents, templates and interactive forms. From the Inbox, you can also click links at the top of the page to:

- Compose messages
- View and/or pay statements
- Generate Personal Health Records
- > Renew medications
- Request appointments
- View health topics

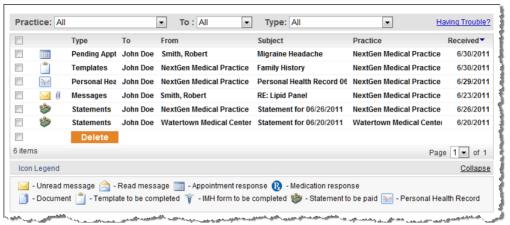
## Accessing Inbox items

You must access the messages and requests in the Inbox.

### To access Inbox items:

- 1 From your Home page, click the You have new items, click here to view link.
- **2** The number of new items appears in parenthesis.
- **3** You can also select the **Inbox** tab or click the **Inbox** link on the navigation pane.

**4** By default all items from all practices for you and any people you are managing the display. New items appear in bold type. The total number of items in your Inbox appears on the bottom left of the page.



- **5** To refine the number of items displayed in the Inbox, use the **Practice**, **To**, and **Type** filters located at the top of the Inbox.
  - You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.
- **6** Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.
- 7 To navigate to other pages, select the page number from the drop-down list or click the Previous or Next links on the bottom right of the page.
- **8** Click an item in the list to open it.

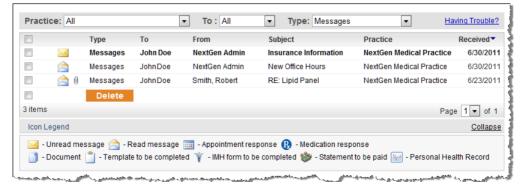
## Replying to Messages

NextGen Patient Portal enables you to receive messages, such as appointment reminders, referrals, etc. from your practice and to send back a response.

### To reply to a message:

- 1 Access your Inbox (see "Accessing Inbox items" on page 33).
- **2** Select Messages from the Types list.

A list of messages display.



Unread messages appear in bold type.

**3** Click a message to open it.

The message opens in a new window.



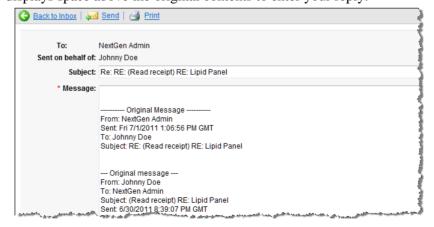
**4** To view any attachments (requires Adobe Acrobat Reader), click the appropriate link in the **Attachments** section.

The attachment opens in a new window.



**5** To enter a response, click Reply.

The message displays space above the original contents to enter your reply.



**6** Type in your reply and click **Send**.

A message displays indicating that your message was sent. To print out the message, click the **Print** button.

**7** Close the window to return to your account.

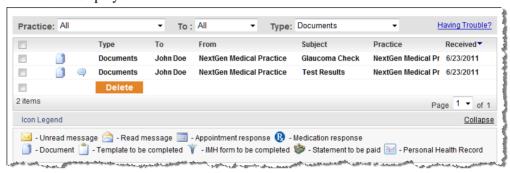
## Viewing Documents

In order to view documents sent from your practice, will need Adobe Acrobat Reader. If you do not have it, you can download it from the Adobe website (http://get.adobe.com/reader/).

### To view a document:

- 1 Access your Inbox (see "Accessing Inbox items" on page 33).
- 2 Select Documents from the Types list.

A list of document display.



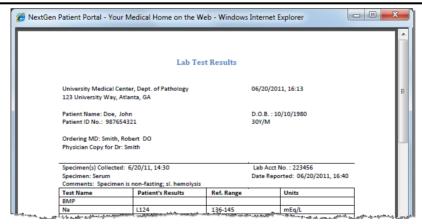
Unread documents appear in bold type.

3 To view comments sent from the practice regarding the document click the Comment □ icon.



4 Click a document to view it.

Notes: Depending on your operating system, computer settings and Adobe Acrobat Reader settings, you may be prompted to download the file before viewing it. In some cases, Web browser settings or pop-up blocker applications can prevent documents from opening. Refer to the appropriate operating system, Adobe Acrobat Reader, browser or pop-up blocker documentation for more information.



Note: If the document has been recalled by the practice staff, you can see a message indicating that the document has been recalled by practice staff and actual contents are not displayed. The message displayed depends on the configuration done in File Maintenance > Online Practice Settings window.

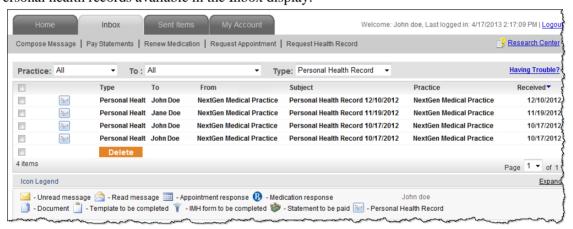
## Viewing Personal Health Records

When you receive a personal health record in your Inbox, you can view the details and perform the following tasks:

- Transmit
- View audit history
- Download and save

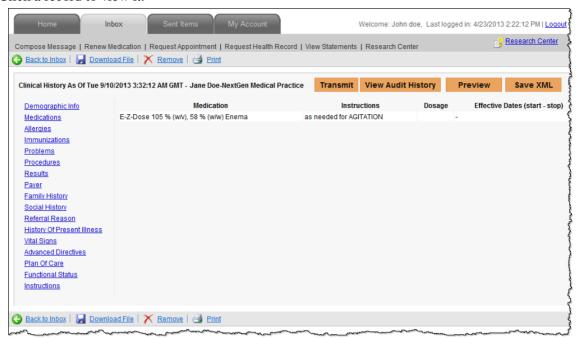
### To view your personal health record:

- 1 Access your Inbox (see "Accessing Inbox items" on page 33).
- 2 Select Personal Health Records from the Types list.
  Personal health records available in the Inbox display.



Unread records appear in bold type.

3 Click a record to view it.



**4** Select a category (such as problems or procedures) on the left to view additional information. The details of the selected category display.

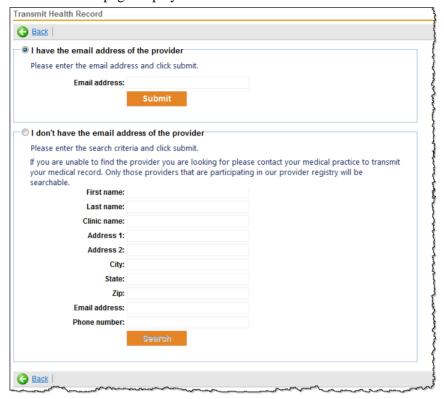
## Transmitting Personal Health Record

Use this feature to send out your Personal Health Record to another provider.

### To transmit the Personal Health Record:

- 1 Select a Personal Health Record from the Inbox (see "Viewing Personal Health Records" on page 37).
  - The Personal Health Record details display.
- 2 Click Transmit.

The *Transmit Health Record* page displays.



- 3 If you know the provider's email address, select the I have the email address of the provider option.
- 4 Enter the Email address.
- 5 Click Submit.

A message confirming that your request has been submitted displays.

Or

- **6** If you do not know the provider's email address, select the I don't have the email address of the provider option.
- **7** Enter at least one search criteria.
- 8 Click Search.
  - A list of providers matching the search criteria displays.
- **9** Select the provider, and click **Submit**.
  - A message confirming that your request has been submitted displays.

## Viewing Audit History

Audit History provides a log of the tasks performed on clinical history documents. These tasks include requesting, opening, viewing and saving the Personal Health Records.

### To view the Audit History:

- 1 Select a Personal Health Record from the Inbox (see "Viewing Personal Health Records" on page 37).
  - The Personal Health Record details display.
- 2 Click Audit History.

The Audit History details display. You can only view the different operations performed along with the date and time.



**3** Click Back, to return to the Personal Health Record details.

## Previewing Personal Health Records

You can preview all details in the personal health record as a Continuity of Care Document (C-CDA).

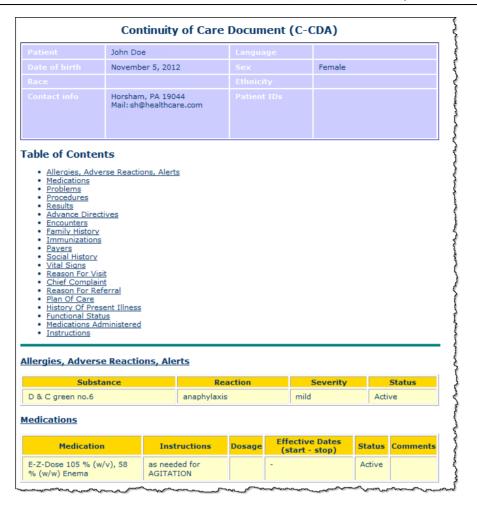
### To preview the personal health record:

4 Select a Personal Health Record from the Inbox (see "Viewing Personal Health Records" on page 37).

The Personal Health Record details display.

5 Click Preview.

The C-CDA displays in a new window.



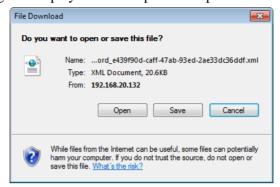
## Saving Personal Health Record as XML

You can save the personal health record details in the XML format.

### To save the personal health record as XML:

- **6** Select a Personal Health Record from the Inbox (see "Viewing Personal Health Records" on page 37).
  - The Personal Health Record details display.
- 7 Click Save XML.

The File Download dialog box displays with the options to open or save the XML file.



### 8 Click Save.

Note: You can also click Open to view the XML and print.

The Save As dialog box displays.



- **9** If required, select a location or change the filename.
- 10 Click Save.

The XML file is saved in the selected location.

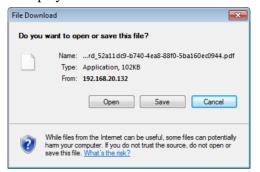
## Downloading and Saving Personal Health Records

You can download and save the Personal Health Records as a PDF file. You need the Adobe Acrobat Reader to view the PDF file.

### To save the Personal Health Records as a PDF file:

- 1 Select a Personal Health Record from the Inbox (see "Viewing Personal Health Records" on page 37).
  - The Personal Health Record details display.
- 2 Click the My Data button.

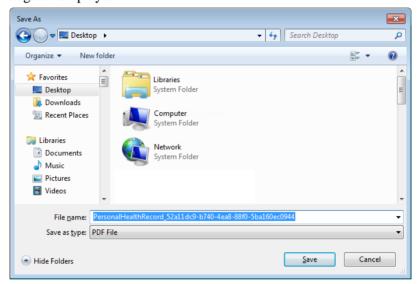
The File Download dialog box displays.



### 3 Click Save.

Note: you can also click Open to view the record and then print.

The Save As dialog box displays.



- 4 If required, select a location and change the filename.
- 5 Click Save.

The PDF file is saved in the selected location.

## Submitting a Template

On occasion you may receive practice-specific templates (forms) that you can complete and submit online using your NextGen Patient Portal account.

### To submit a template:

1 Access your Inbox (see "Accessing Inbox items" on page 33).

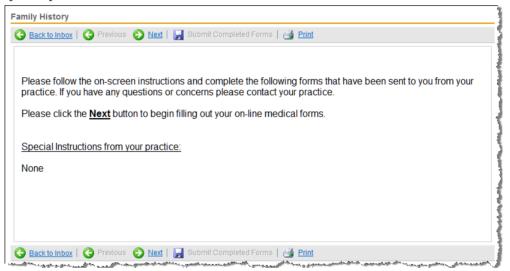
**2** Select Templates from the Types list.



Unread templates appear in bold type.

**3** Click a template to open it.

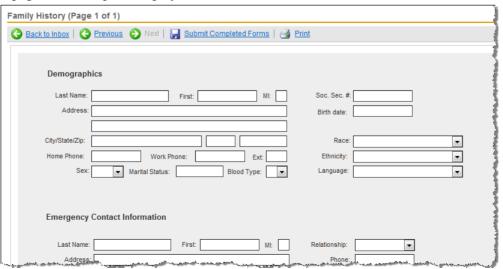
The template opens in a new window.



The first page of the form includes instructions for completing it.

4 Read the instructions and click the Next button.

The next page of the template displays.



- **5** Fill out the template as instructed.
- **6** To print out the displayed page of the template, click the **Print** button.
- 7 To proceed to the next page, click the Next button. To go back to the previous page, click the Previous button.
- **8** After you have completed the template, click the Submit Completed Forms button. A message indicating that your information has been submitted to your practice for review displays.
- **9** Click the Close button to return to the list of templates. Your copy of the submitted form moves to Sent Items.

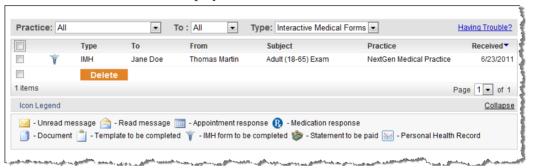
## Submitting an Interactive Medical Form

Occasionally, you may receive interactive medical forms that you can complete and submit online using your NextGen Patient Portal account. These decisions-based questionnaires are primarily designed to gather medical history and diagnostic information prior to your visit.

### To submit an interactive medical form:

- 1 Access your Inbox (see "Accessing Inbox items" on page 33).
- **2** Select Interactive Medical Forms from the Types list.

A list of interactive medical forms displays.



The Unread form items appear with bold type in the list of interactive medical forms.

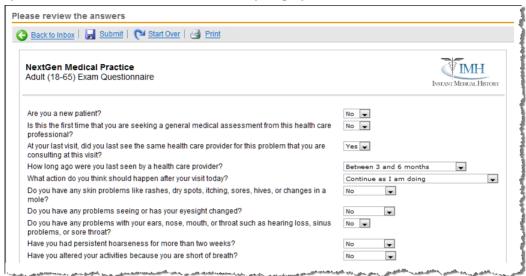
**3** Click a form to open it.

The form opens in a new window.



**4** Answer the question as instructed. If the question is not applicable, click the **Skip Question** button.

- 5 To print out the displayed page of the template, click the Print button.
- **6** To proceed to the next question, click the Next button. To return to the previous question, click the Back button.
- **7** To save your answers and return to the list of forms, click the Save and Close button. When you reach the end of the form, as summary displays.



- **8** Review your answers and either:
  - Click Start Over to go back and start from the first question.

Note: A confirmation message to go back to the first question displays. Click OK to start over.

- > Click Print to print out your answers.
- Click Back to Inbox to go back to Inbox page.



- **9** Once you have completed your form, click the **Submit** button to send the form to the practice. A message indicating that your information has been submitted to your practice for review displays.
- **10** Click Back to Inbox to return to the mail box page.

Your copy of the submitted form moves to Sent Items.

## Deleting Inbox Items

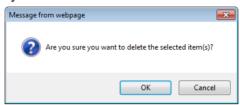
### To delete one or more items from the Inbox:

- 1 Access your Inbox (see "Accessing Inbox items" on page 33).

  By default all items from all practices for you and any people you are managing displays.
- **2** To refine the number of items displayed, use the Practice, To, and Type filters located at the top of the Inbox.
  - You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

- **3** Click a column name (Type, To, From, and so on) to sort the list in ascending or descending order.
- **4** To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
- **5** Either select the check box next to each item you want to remove or select the check box next to the Delete button to remove all items.
- 6 Click Delete.

A confirmation message displays.



**7** Click **OK** to delete the item.

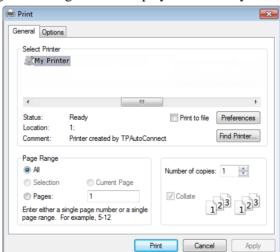
## Printing a Message

You can print all Inbox items for your record.

### To print a message:

- 1 From the Inbox tab, open the message. The message details display.
- 2 Click Print.

A new window containing the message details displays followed by the *Print* dialog box.



**3** Select the printer and click **Print**.

The message is printed through the selected printer.

### Sent Items

The Sent Items page displays all messages and items you sent to all practices. From the Sent *Items* page, you can also click links at the top of the page to:

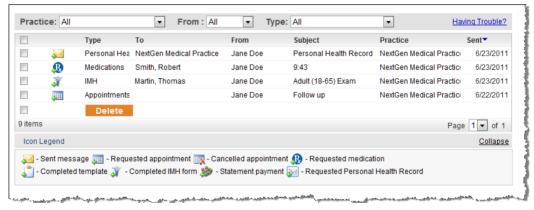
- Compose messages
- View and/or pay statements
- Generate Personal Health Records
- Renew medications
- Request appointments
- Research health topics

## Accessing Sent Items

#### To access sent items:

Either select the Sent Items tab or click the Sent Items link on the navigation pane.

By default all sent items from all practices to you and any people you are managing display. The total number of items appears on the bottom left of the page.



- To refine the number of sent items displayed, use the Practice, To, and Type filters located above the list of sent items.
  - You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.
- **3** Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.
- **4** To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
- **5** Click an item in the list to open it.

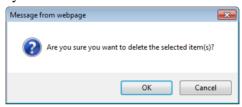
## **Deleting Sent Items**

### To delete one or more sent item:

1 Select the Sent Items tab or click the Sent Items link on the navigation pane.

- By default all sent items from all practices for you and any people you are managing displays. The total number of items appears on the bottom left of the page.
- **2** To refine the number of items displayed, use the Practice, To, and Type filters located above the list of sent items.
  - You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.
- **3** Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.
- **4** To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
- **5** Either select the check box next to each item you want to remove or select the check box next to the Delete button to remove all items.
- 6 Click Delete

A confirmation message displays.



**7** Click **OK** to delete the item.

### CHAPTER 6

# **Tasks**

This chapter explains how to compose messages, view statements, make payments, request health records, request appointments, renew medications and use the research center.

# Composing Messages

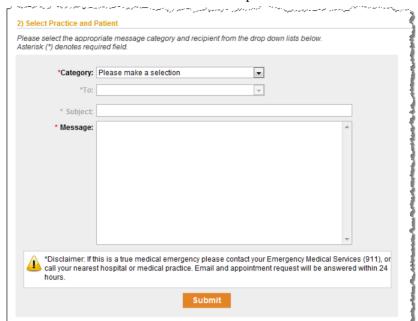
Use the following procedure to send a message to your practice. A red asterisk next to a field name indicates a required entry.

### To compose a message:

1 From the Inbox tab, Sent Items tab or the navigation pane, click the Compose Message link. The *Compose Message* form displays.



- 2 If you are enrolled in multiple practices, select the Practice where the message is to be sent.
- **3** If you are managing other people's accounts, select the **Patient** on whose behalf you are making the request.



4 Scroll to the Select Practice and Patient section and complete as follows:

- Select the type of message you are sending from the Category list.
   Note: Categories are specific to each practice and may vary based on your selection.
- > Select the recipient of the message from the To list.
- Type the **Subject** of the message in the corresponding field.
- Type your Message in the corresponding field.
- 5 Click Submit.

A message indicating that your message has been successfully sent displays.

# Viewing Statements

### To view statements:

1 From the Inbox tab or the navigation pane, click the View Statements link.
If your practice accepts electronic payments through the NextGen Patient Portal website, click the Pay Statements link.

Statements NextGen Medical Practice Collapse Your Statements ADDRESSEE: REMIT TO: Doe, John 123 Elm Street NextGen Medical Practice 234 Main Street Atlanta, GA 30324 Atlanta, GA 30301 Amount due Statement date: 6/29/2011 \$925.00 Total account balance: \$1,000.00 Statement Date View Statement 9/29/2011 Latest Statement Click to view this statement 9/25/2011 Click to view this statement \$

The current amount due and a list your statements display.

2 To view a statement for a particular date, click the corresponding click to view this statement link.



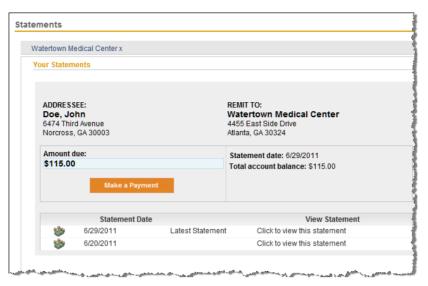
- **3** To print the statement, click **Print**
- **4** To return to the statement list, click Close.
- **5** If your practice accepts electronic payments, click Make a Payment (see "Making Payments" on page 53).

# Making Payments

Note: Some practices may not accept electronic payments through the NextGen Patient Portal website.

### To make payments:

1 From the Inbox tab, Sent Items tab or the navigation pane, click the Pay Statements link. Your latest statement summaries display.



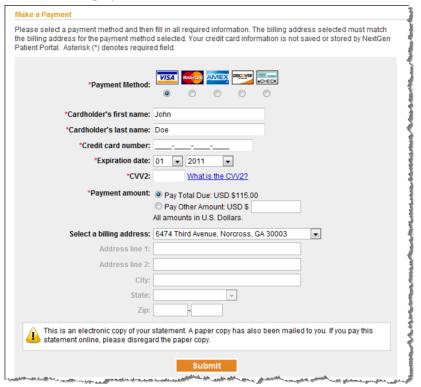
2 To view a statement for a specific date, click the corresponding click to view this statement link. Otherwise proceed to the next step to make a payment.

The selected detailed statement displays.



3 Click Make a Payment.

### The Make a Payment form displays



4 Select a Payment Method (Visa, MasterCard, American Express, Discover or eCHECK).

Note: Since each practice has its own payment rules, some of the payment methods listed may not be available.

- **5** By default, the system displays the logged in user's first and last name in the Cardholder's name fields. If this name is different than the name that appears on your credit card or account, update the first and last name fields accordingly.
- **6** For Credit Card Payments, enter or select the following information:
  - Credit Card Number
  - Expiration Date
  - > CVV2

Note: The CVV2 code is a three- or four-digit number used to authenticate account details and protect against fraud. On most credit cards, this number appears on the back of your card above your signature. If the security code is missing or illegible, please call your bank or credit card company for assistance.

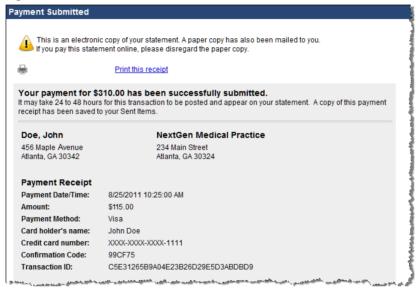
For eCHECK Payments, enter or select the following information:

- Nouting number
- Account number
- Bank account type (Checking or Savings)

Note: The bank routing number is the nine digit number located on the lower left of your check between the |: |: symbols. The bank account number is located to the right of the routing number and can be up to 17 digits long. There is no specific number of characters for a bank account number. Do not include the check number in either the account or routing numbers.

- 7 Select either Pay Total Due or Pay Other Amount
  - When choosing Pay Other Amount, enter the payment amount.
  - All amounts are in US dollars.
- **8** If the Billing Address is different than the one displayed, select Enter a different billing address and then enter the information in the fields below (all fields are required).
- 9 Click Submit.

After successfully processing your payment, the system displays your payment receipt, places a copy of the payment in the Sent Items folder and sends an email to notify you that your payment was delivered to practice.



Note: It may take 24 to 48 hours for this transaction to be posted and appear on your statement.

**10** To print your payment receipt, click the Print this receipt link.

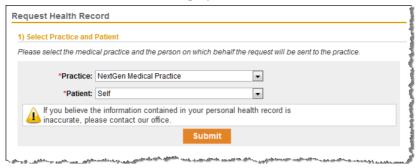
# Requesting Personal Health Records

The following procedure describes how to request a Personal Health Record (PHR) from a practice. When you receive your PHR, you can view it and save to it to a storage device such as a CD, smart card or USB flash drive.

### To request a personal health record:

1 From the Inbox tab, Sent Items tab or the navigation pane, click the Personal Health Record link.

The Request Personal Health Record form displays.



- 2 If you are enrolled in multiple practices, select the Practice where the message is to be sent.
- **3** If you are managing other people's accounts, select the Patient on whose behalf you are making the request.
- 4 Click Submit.
  - A message that your request has been successfully submitted displays. When the health record is sent to you, it shows up as a new item in your Inbox.
- 5 Click on the record to view it or go to your Home page and select the My Medical Record link. The active medications are displayed on the top part of the page and they are listed in the reverse chronological order (with the most recent items at the top).

## **Appointments**

There are three types of appointments depending on how your practice processes appointments:

- Integrated you can submit an appointment request by selecting a preferred date and time
- Non-Integrated you can submit an appointment request by selecting a preferred and optionally an alternate date and time
- Real Time you can search for an available appointment schedule by selecting a preferred date and time and book an appointment

These options are determined by your practice.

## Starting an Appointment Request

Use the following procedure to create an appointment request. A red asterisk next to a field name indicates a required entry.

### To start an appointment request:

1 In the Inbox tab, Sent Items tab or the navigation pane, click the Request Appointment link.

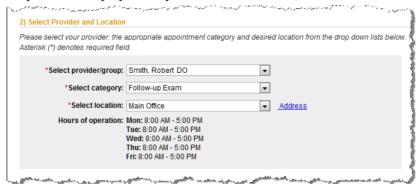
The Appointment Request form displays.



- 2 If you are enrolled in multiple practices, select the Practice from the corresponding list.
- If you are managing other people's accounts, select the Patient on whose behalf you are making the request.
- **4** Scroll to the Select Provider and Location section and complete as follows:



- > Select the **provider** or **group** who you want to see for your appointment.
- Select the category or type of appointment you want to schedule, such as consultation or follow-up. Categories are specific to each practice, so the categories in the list vary by practice.
- > Select the office or facility **location** where you want to schedule the appointment. The hours of operations display when you select a location.

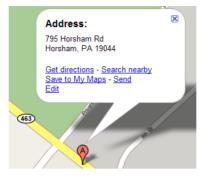


**Note**: If the hours of operation is not set up for a practice, a message indicating the same displays on the page. Contact your practice to set up the hours of operation.

To view the address information for the selected location, click the Address link.



If needed, click the Map \* icon to view the address information for a selected location in a new window



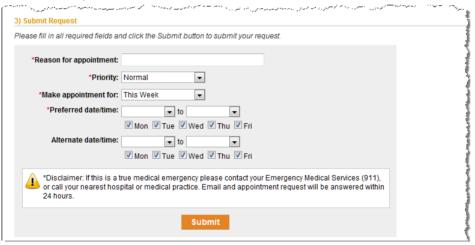
**5** Depending on how your practice process appointments, either submit (see "Submitting an Appointment Request" on page 59) the request and wait for a response from the practice or book (see "Booking an Appointment" on page 60) your own appointment.

## Submitting an Appointment Request

Submitting an appointment request does not guarantee an actual appointment with your physician. It must be confirmed by the medical practice before it is considered a booked appointment. Allow at least 24 hours to receive a response. If needed, you can then request a change or cancel the request.

### To submit an appointment request:

- 1 Create an Appointment Request. (see "Starting an Appointment Request" on page 57)
- **2** Scroll to the **Submit Request** section.



- **3** Enter or select the following information:
  - **Reason for appointment:** Enter the reason for the appointment.
  - **Priority**: Select the level of urgency (Low, Normal or High).
  - Make appointment for: Select the time frame for your appointment, such as next week or next month.
  - > Preferred date/time: Select a time within the hours of operation (displayed beneath the selected location), and then select a corresponding check box for the day when you would like to schedule the appointment.

Alternate date/time: If available, select an alternate date and time when you would like to schedule the appointment. You can also select a corresponding check box for the day when you would like to schedule the appointment.

Note: The Alternate date/time is available only when the appointment type is non-integrated.

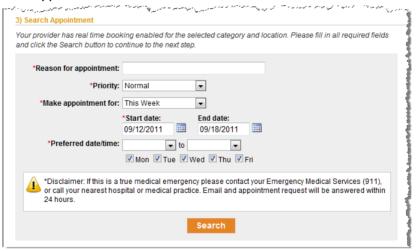
- 4 Click Submit.
  - A message indicating that your appointment request has been successfully submitted displays.
- **5** When the practice responds to your request, it sends an email notifying you to log on to your account to review the appointment request response.
- **6** Open the request response to see if the appointment was booked or is pending (see "Accepting a Pending Appointment Request" on page 63).
- **7** If the suggested time is not suitable, you need to either cancel (see "Cancelling a Booked Appointment" on page 63) or reschedule (see "Rescheduling a Booked Appointment" on page 62) the appointment and then create a new request.

## Booking an Appointment

Use the following procedure to interactively book your own appointments (if allowed by your practice). This option to book an appointment is available only if your practice has enabled and set up real-time appointments.

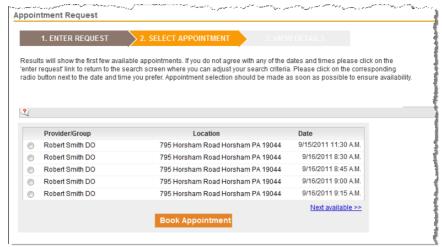
### To book an appointment request:

- 1 Create an Appointment Request. (see "Starting an Appointment Request" on page 57)
- **2** Scroll to the **Search Appointment** section.



- **3** Enter or select the following information:
  - **Reason for appointment**: Enter the reason for the appointment.
  - > Priority: Select the level of urgency (Low, Normal or High).
  - Make appointment for: Select the time frame for your appointment, such as this week, next week, or next month.
  - > Preferred date/time: Select the preferred date and time, and then select the corresponding check box for the day when you would like to schedule the appointment.
- 4 Click Search.

NextGen Patient Portal displays the first five available appointments.



**5** Select an appointment from the list.

If the appointments listed are not suitable, click the Next available link. Click the Back to first available link to view the first five appointments.

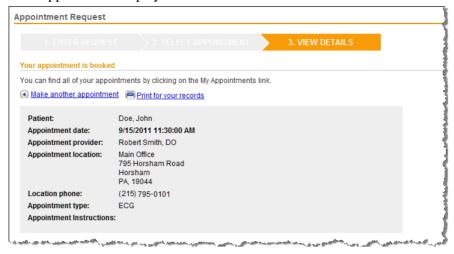


Note: If there are no appointments available for the date and time you selected, either select a different date and time and search again, or click Submit Request to have the practice respond.



6 Once you have selected an appointment, click Book Appointment.

The details of the appointment display.



7 If needed, you can click the corresponding links to Make another appointment or Print for your records.

## Rescheduling a Booked Appointment

If allowed, you can reschedule a booked appointment.

### To reschedule a booked appointment:

1 Click the My Appointments link and open a booked appointment.

The Appointment Detail form displays.



2 Click Reschedule This Appointment.

A list of reasons to reschedule displays.



Note: The Reschedule This Appointment link will not be available when reasons to reschedule are not set up at the practice. Contact the practice to reschedule the appointment.

- 3 Select a Reason and click Submit.
  - The My Appointment page opens. The selected appointment's status is now set to Cancel..
- **4** You can now start a new appointment request (see "Starting an Appointment Request" on page 57).

## Cancelling a Booked Appointment

If needed, you cancel an appointment that was booked using your NextGen Patient Portal account.

### To cancel an appointment:

1 From either the Inbox or the My Appointments link, open a booked appointment. The *Appointment Detail* form displays.



2 Click Cancel This Appointment.

A list of reasons to cancel displays.



Note: The Cancel This Appointment link will not be available when reasons to cancel are not set up at the practice. Contact the practice to cancel the appointment.

3 Select a Reason and click Submit.

The My Appointment page opens. The selected appointment's status is now set to Cancel.

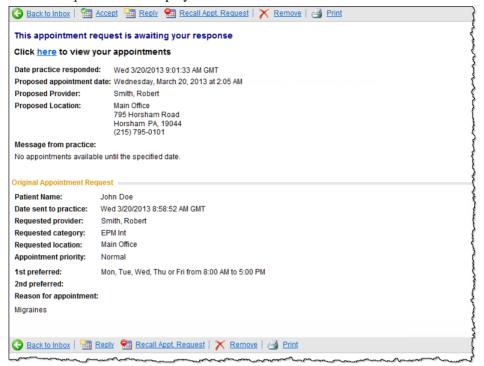
## Accepting a Pending Appointment Request

When you receive a pending appointment request from a practice you must accept the request to schedule the appointment.

### To accept a pending appointment request:

1 From the lnbox tab, open the pending appointment.

The Appointment Request details display.



**2** Click Accept to accept the appointment.

A message that your appointment response has been successfully submitted displays.

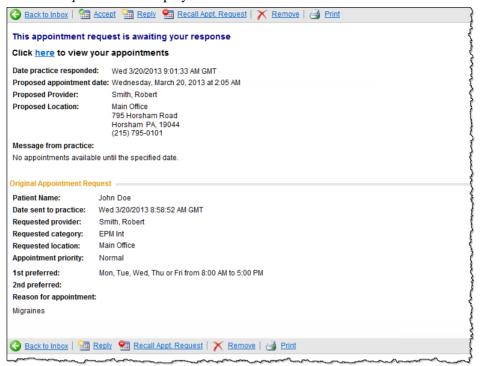
## Sending a New Appointment Request from Pending Requests

You can send a new appointment request from a pending appointment request message.

### To send a new appointment request from a pending request:

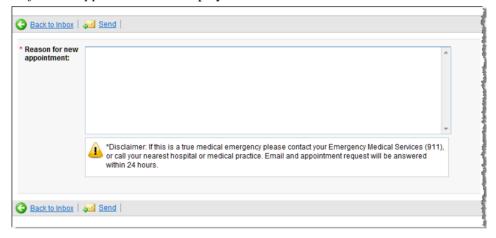
1 From the **Inbox** tab, open the pending appointment.

The *Appointment Request* details display.



**2** Click Reply to request a new appointment.

The Reason for new appointment box displays.



- **3** Enter the reason for the new appointment.
- 4 Click Send.

A message that your appointment response has been successfully submitted displays.

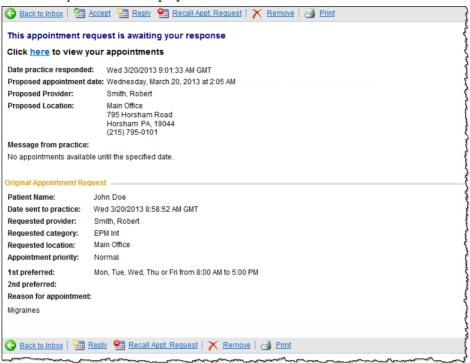
## Cancelling an Appointment Request

You can cancel a pending appointment request.

### To cancel a pending appointment request:

1 From the **Inbox** tab, open the pending appointment.

The Appointment Request details display.



2 Click Recall Appt. Request.

A confirmation message displays.



3 Click OK.

The pending appointment request is canceled.

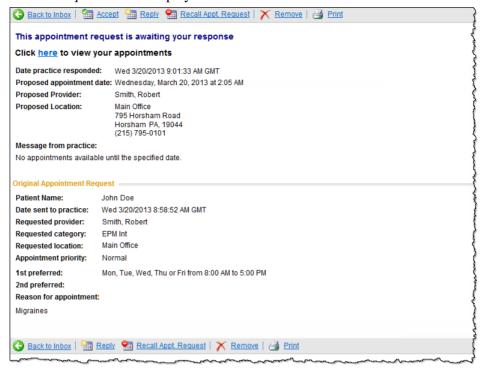
## Deleting a Pending Appointment Request

You can remove a pending appointment request that is redundant or elapsed.

### To remove a pending appointment request:

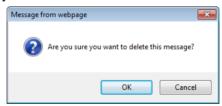
1 From the **Inbox** tab, open the pending appointment.

The *Appointment Request* details display.



#### Click Remove.

A confirmation message displays.



#### 3 Click OK.

The pending appointment request is removed from the account.

# Renewing Medications

The NextGen Patient Portal provides an easy method of requesting medication renewals. Allow at least 24 hours to receive a response.

### To renew your medication(s):

- 1 Select your medical practice (see "Selecting Your Medical Practice" on page 68).
- **2** Select your medication(s) (see "Renewing Medications" on page 67).
- **3** Select your pharmacy (see "Selecting Your Pharmacy" on page 70).
- **4** Submit your renewal request (see "Submitting Your Request" on page 71).

## Selecting Your Medical Practice

To begin the medication renewal process, you must first select your medical practice and if needed, on whose behalf you are making the request.

### To select your medical practice:

- 1 From the Inbox tab, Sent Items tab or the navigation pane, click the Renew Medications link. The *Renew Medications* form displays.
- **2** Scroll to the Select Your Medical Practice section.



Note: A red asterisk next to a field name indicates a required entry

- **3** If you are enrolled in multiple practices, select the **Practice** you want to renew your medication from the corresponding list.
- **4** If you are managing other people's accounts, select the **Patient** on whose behalf you are making the request.
- 5 You can now select your medication(s) (see "Renewing Medications" on page 67).

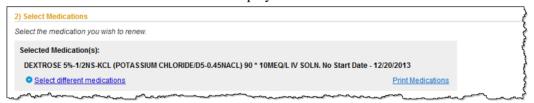
## Selecting Your Medication

The second step is renewing your medication is to select your medication.

### To select your medication:

1 After selecting your practice (see "Selecting Your Medical Practice" on page 68), scroll to the Select Medications section.

A list of medications available for renewal display.

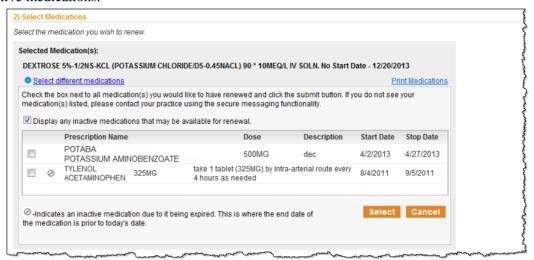


2 If no prescriptions are listed, or you want to select another medication, click the Select different medications link.

A list of alternative medications display.



3 Select the Display any inactive medications that may be available for renewal check box to view inactive medications.



If you do not see your medication(s) listed, contact your practice.

- **4** Select the check box next to the medication(s) you want to renew.
- 5 Select the Yes, I would like to request the above inactive medication check box to confirm.

Note: If the Yes, I would like to request the above inactive medication check box is not selected when renewing inactive medications, the following warning message displays when you try to click Submit:



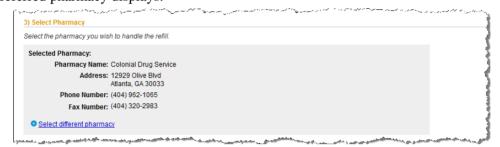
- **6** To make any changes, repeat Steps 1 through 4.
- **7** Click the Select button.
- **8** You can now select your pharmacy (see "Selecting Your Pharmacy" on page 70).

## Selecting Your Pharmacy

The next step is renewing your medication is to select your pharmacy if one does not display or is different than the one displayed.

### To select a pharmacy:

1 After selecting your medication, scroll to the Select Pharmacy section. Your preferred pharmacy displays.



**2** If no pharmacy is listed, or you want to select another pharmacy, click the Select different pharmacy link.

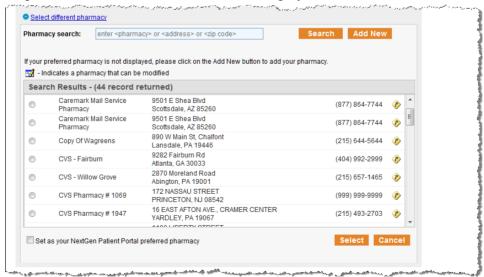
A search form displays.



**3** Enter the search criteria (pharmacy name, address, city, state or zip code) to locate a pharmacy and click **Search**.

To return a list of all available pharmacies, leave the Pharmacy search field blank and just click Search.

The top 100 pharmacies that meet the search criteria display.



**4** If needed, click the Map ⋄ icon next to the pharmacy's phone number to view a map of the selected location in a new window.



- **5** Click the button next the pharmacy's name to select it.
- **6** If the pharmacy you want to use does not appear, click **Add New** (at the top of the form). The *Add New Pharmacy* form displays.



**7** Enter the requested information and click Save.

Note: A red asterisk next to a field name indicates a required entry.

The pharmacy that was just added displays at the top of the list. A Modify Pharmacy si icon appears next to the entry.



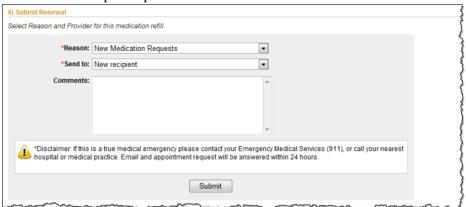
- **8** To change information about the pharmacy you just created, click it.
- **9** To set the selected pharmacy as your preferred NextGen Patient Portal pharmacy that displays each time you renew medications for the selected practice, select the corresponding check box.
- **10** You can now submit your renewal request (see "Submitting Your Request" on page 71).

## Submitting Your Request

After selecting the practice, medication and pharmacy you must submit the renewal request.

### To submit the renewal request:

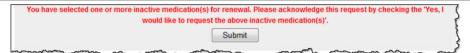
- 1 In the Submit Renewal section:
  - > Select the Reason for renewal.
  - > Select the Person to whom you are sending the medication renewal
  - > Enter the reason for the prescription renewal in the Comments field.



**2** Click Submit to complete the process.

A message that your medication renewal request has been successfully submitted displays.

Note: If the Yes, I would like to request the above inactive medication check box is not selected when renewing inactive medications, the following warning message displays when you try to click Submit:



### Research Center

Use the Research Center link to view the Healthwise<sup>®</sup> Health Information Knowledgebase, an online health encyclopaedia.

### To access the Healthwise Knowledgebase:

1 From the navigation pane or the upper right of any tabbed page (Home, Inbox, etc.), click the Research Center link.



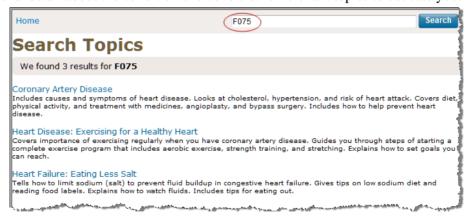


#### **2** From this page you can:

Perform a Search: The search function enables you to research health topics.
If you received a Healthwise Patient Instruction handout at the office, you can enter the code number at the bottom of the page in the Search field to view that topic or other related topics.



While the Patient Instruction handout covers high level topics and provides clear instructions (such as "What to do after your visit for Heart Disease"), the Knowledgebase provides additional detail about the condition and covers other relevant topics to educate you.



In the case of F075 to address "A Healthy Heart: After Your Visit," the Knowledgebase addresses what Heart Disease is, how to treat it, lifestyle changes to improve the condition, classes of medicines to be taken, procedures that can be performed, etc.

- > Use Interactive Tools: The interactive tools in the Healthwise Knowledgebase provide you with tailored health information just by answering a few questions about your health. You can assess your risk for a heart attack, learn what contributes to stress, or even calculate the calories you burn during a particular activity. Links to these interactive tools appear throughout relevant topics and in the Health Tools section of topics.
- > View Health Topics: With more than 8,000 topics on health conditions, medical tests and procedures, medications, and everyday health and wellness issues, the Healthwise Knowledgebase helps you become informed about your health to enhance partnerships with your doctors for better health decisions.
- > Access Learning Centers: Use this feature to learn about medical conditions, how the body works, and other health-related topics.
- > Check Your Symptoms: This interactive tool enables you to pick an area of the body, select your symptoms and view related topics.
- > Access Decision Tools: Decision Points are designed to guide you through key health decisions (such as surgeries, medical tests, medicines, and health issues), combining medical information with your personal values to make a health decision right for you.
- > Browse Health Information: This option allows you to search for topics and content alphabetically by entering the first letter of the topic or condition. A list of relevant topics displays if you are unsure of the exact topic name.
- > Use Quick Links: The Quick Links option provides short cuts to information on medications, medical tests, health decision tools, symptom checker and support groups. It also provides a link to a Spanish Health Guide.

Information from this website does not replace the advice of a doctor. Healthwise disclaims any warranty or liability for your use of this information. Your use of this information means that you agree to the Terms of Use. Healthwise is a URAC accredited health website content provider. How this information was developed

(https://www.healthwise.net/nextgen/Content/StdDocument.aspx?DOCHWID=supportabouthw#support-abouthw-editorial) to help you make better health decisions.

#### CHAPTER 7

# My Account

This chapter provides instructions on how to update information in your NextGen Patient Portal account, manage user grants and add additional practices to your account.

## **Account Settings**

This section describes how to use the functions that appear under My Account to change your user name, password, security question and forgotten password question.

## Changing Your User Name

You can change your user name that was provided while you registered in NextGen Patient Portal when required.

#### To change your user name:

1 From either the My Account tab or the navigation pane, click the Account Settings link. The *Account Settings* page displays.



**2** In the User Name section, click the Edit link.

The User Name section expands.



- 3 Enter your new user name and then retype it in the fields provided.

  All fields are required. User names are case sensitive and must be between six and 20 characters.
- **4** Enter your current password in the field provided.
- 5 Click Submit.

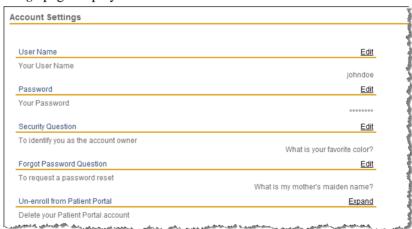
A message that your user name has been updated displays. Refresh the screen to view your new user name.

## **Changing Your Password**

You can change your password that was provided while you registered in NextGen Patient Portal when required.

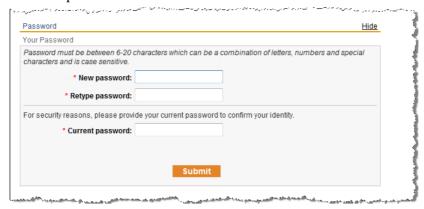
#### To change your password:

1 From either the My Account tab or the navigation pane, click the Account Settings link. The *Account Settings* page displays.



2 In the Password section, click the Edit link.

The Password section expands.



**3** Enter your **new password** and then retype it in the fields provided.

All fields are required. Passwords are case sensitive, must between 6 and 20 characters and contain at least one number

As you type your password, a password strength indicator displays. Use mixed-case alphabets, numbers and punctuation characters to increase the password strength.

- **4** Enter your current password in the field provided.
- 5 Click Submit.

A message that your password has been updated displays.

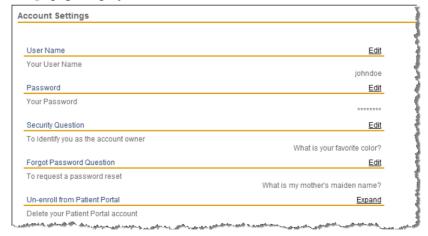
The next time you log in to the NextGen Patient Portal, use your new password.

### **Changing Your Security Question**

You can change your security question that was provided while you registered in NextGen Patient Portal when required.

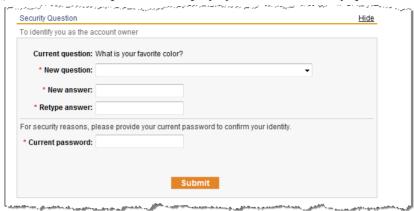
#### To change your security question:

1 From either the My Account tab or the navigation pane, click the Account Settings link. The *Account Settings* page displays.



**2** In the Security Question section, click the Edit link.

The Security Question section expands and displays your current security question.



- 3 Select a new question from the list.
- 4 Enter and confirm your new answer in the fields provided.

Note: All fields are required.

- **5** Enter your current password in the field provided.
- 6 Click Submit.

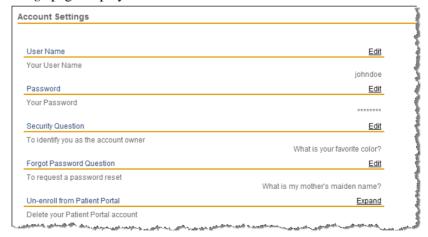
A message that your security question has been updated displays.

## Changing Your Forgotten Password Question

You can change your forgotten password question that was provided while you registered in NextGen Patient Portal when required.

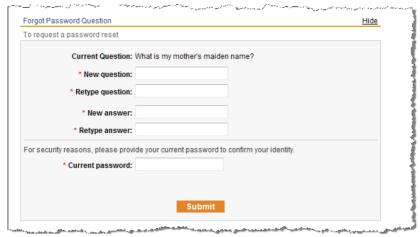
#### To change your forgotten password question:

1 From either the My Account tab or the navigation pane, click the Account Settings link. The *Account Settings* page displays.



2 In the Forgot Password Question section, click the Edit link.

The Forgot Password section expands and displays your current question.



- 3 Enter and confirm a new question to help you remember your password in the fields provided.
- 4 Enter and confirm a new answer to your new question in the fields provided.
- Click Submit.The message that your forgotten password question has been updated displays.

## Un-enrolling from the NextGen Patient Portal

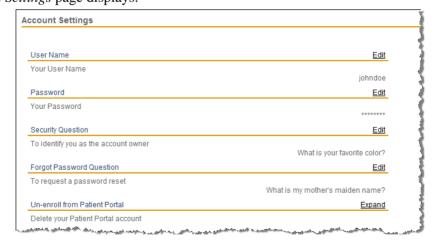
You can un-enroll from the NextGen Patient Portal at any time.

#### To un-enroll from the NextGen Patient Portal:

1 From either the My Account tab or the navigation pane, click the Account Settings link.

Note: You van also un-enroll from the Manage Practices (see "Un-enrolling from the NextGen Patient Portal" on page 93) tab.

The Account Settings page displays.



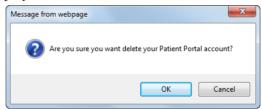
2 In the Un-enroll from NextGen Patient Portal section, click the Expand link.

A form to un-enroll from NextGen Patient Portal displays.



- **3** Select the Reason you are un-enrolling from the corresponding list.
- 4 Click Un-enroll.

A confirmation message displays.



5 Click OK to delete your NextGen Patient Portal account.

## My Information

You can update your name, address, email and phone at any time. However, updates to your personal contact information are not sent electronically. You must contact the practice by sending a secure message or calling your practice directly.

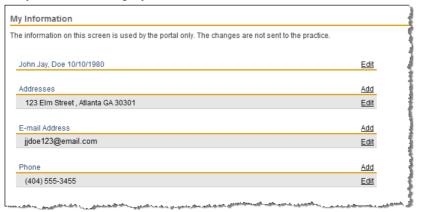
## Updating Your Name and Date of Birth

Use the following procedure to update your name and/or date of birth.

**Note**: The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.

#### To update your name and date of birth:

1 From either the My Account tab or the navigation pane, click the My Information link. Information about your account displays.



2 Next to your user name and birth date, click the Edit link.

Your name and date of birth fields display.



- **3** Make you changes as needed.
- **4** If needed, click the Calendar icon to select a date.
- 5 Click Update.

A message that your information has been updated displays.

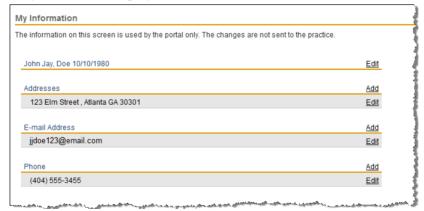
## Managing Your Addresses

Use the following procedure to add, change or delete your mailing addresses.

**Note**: The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.

#### To manage your mailing addresses:

1 From either the My Account tab or the navigation pane, click the My Information link. Information about your account displays.



- 2 Scroll down to the Addresses section.
- **3** To add a new address:
  - Click the Add link.

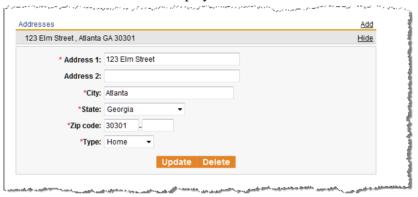
A blank address form displays.



- Enter the requested information (field names with red asterisks are required).
- > Click Add.

A message that your address has been added displays.

- **4** To update an address:
  - Click the Edit link next to the address you want to change. Information about the selected address displays.

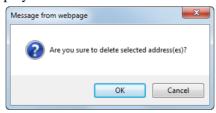


- Make your changes as needed (field names with red asterisks are required).
- > Click Update.

A message that your address has been updated displays.

- **5** To delete a mailing address:
  - Click the Edit link next to the address you want to change. Information about the selected address displays.
  - > Click Delete.

A confirmation message displays.



> Click OK.

A message that your address has been deleted displays.

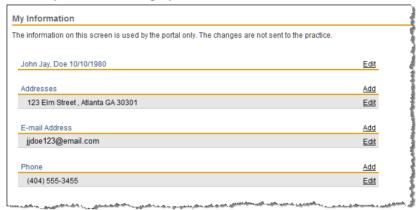
## Managing Your E-mail Addresses

Use the following procedure to add, change or delete your e-mail addresses.

**Note**: The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.

#### To manage your e-mail addresses:

1 From either the My Account tab or the navigation pane, click the My Information link. The information about your account displays.



- **2** Scroll to the E-mail Address section.
- **3** To add another e-mail address:
  - Click the Add link.

A blank e-mail address form displays.



> Enter the new E-mail address in the field provided.

Note: If you are sending an e-mail to a mobile number as text message, the mobile number must be suffixed with the corresponding mobile gateway in the E-mail Address field as mentioned in the following table. For example, if the mobile number is 770-555-0101 and corresponding mobile gateway is American Messaging, then you must enter 7705550101@amsmsg.net in the E-mail Address field.

Name	Gateway
7-11 Speakout	@cingularme.com
Alaska Communications Systems	@msg.acsalaska.com
Alltel Wireless	@message.alltel.com

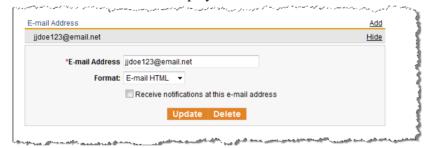
Name	Gateway
American Messaging	@amsmsg.net
AT&T Enterprise Paging	@page.att.net
AT&T Mobility	@cingularme.com
AT&T Wireless	@txt.att.net
BeepOne	@beepone.net
Bell Mobility & Solo Mobile	@txt.bell.ca
Boost Mobile	@myboostmobile.com
Cellular One	@mobile.celloneusa.com
Cellular South	@csouth1.com
Centennial Wireless	@cwemail.com
Cingular	@cingularme.com
Cricket	@mms.mycricket.com
Fido	@fido.ca
Globalstar	@msg.globalstarusa.com
Helio	@myhelio.com
Illinois Valley Cellular	@ivctext.com
Indiana Paging Network	@ipnpaging.com
Iridium	@msg.iridium.com
MetroPCS	@mymetropcs.com
MTS	@text.mtsmobility.com
Ntelos	@nteloswireless.com
Page1	@page1email.com
President's Choice	@txt.bell.ca
ProPage Inc.	@page.propage.net
Qwest	@qwestmp.com
Rogers	@pcs.rogers.com
Rogers Paging	@paging.rogers.com
Sasktel	@sms.sasktel.com
Shentel	@shentel.net
Sprint (Nextel)	@page.nextel.com
Sprint (PCS)	@messaging.sprintpcs.com
Suncom	@tms.suncom.com
Telus Mobility	@msg.telus.com
Thumb Cellular	@sms.thumbcellular.com
T-Mobile	@tmomail.net

Name	Gateway
Tracfone	@cingularme.com
Unicel	@utext.com
USA Mobility	@usamobility.net
Verizon	@vtext.com
Virgin Mobile (Canada)	@vmobile.ca
Virgin Mobile (USA)	@vmobl.com

- From the Format list, select how the e-mail appears on your screen:
  - **E-mail HTML**: Displays text formatting, bullets, numbers, pictures, etc.
  - **E-mail Text**: Displays only un-formatted text
  - > Text Message: Displays abbreviated messages (approximately 200 characters) for mobile devices.
- > Select the Receive notifications at this e-mail address check box if you want NextGen Patient Portal to send notifications to this e-mail address.
- > Click Add.

A message that your e-mail has been added.

- 4 To update an e-mail address:
  - Click the Edit link next to the e-mail you want to change. Information about the selected e-mail displays.

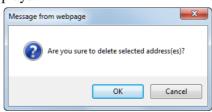


- Make your changes as needed (field names with red asterisks are required).
- Click Update.

A message displays that your e-mail has been updated displays.

- **5** To delete an e-mail address:
  - Click the Edit link next to the e-mail you want to change. Information about the selected e-mail displays
  - Click Delete.

A confirmation message displays.



> Click OK.

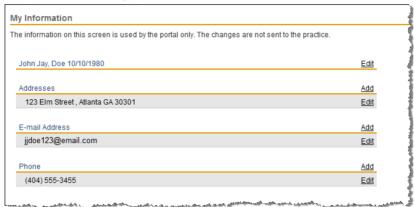
## Managing Your Phone Numbers

Use the following procedure to add, change or delete your phone numbers.

**Note**: The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.

#### To manage your phone numbers:

1 From either the My Account tab or the navigation pane, click the My Information link. Information about your account displays.



- **2** Scroll to the Phone section.
- **3** To add another phone number:
  - Click the Add link.

A blank phone number form displays.



- Enter the requested information (field names with red asterisks are required).
- Click Add

A message that your phone number has been added displays.

- **4** To update a phone number:
  - Click the **Edit** link next to the phone number you want to change.

Information about the selected phone number displays.



- Make your changes as needed (field names with red asterisks are required).
- Click Update.

A message that your phone number has been updated displays.

- **5** To delete a phone number:
  - Click the Edit link next to the phone number you want to change. The information about the selected phone displays.
  - Click Delete.

A confirmation message displays.



A message that your phone number has been deleted displays.

## Managing User Grants

With NextGen Patient Portal your practice(s) can set up relationships that allow you (care manager) to have full or partial access of another user's account (dependent) or allow another user to have full or partial access to your account. For example, a husband can grant his wife permissions to schedule appointments or a patient can allow his/her mother to renew medications.

Practices can define a care manager relationship at the time of enrollment or at the request of the patient. Practices can also designate a health care provider to act on behalf of the patient. You can set up a care manager or manage your own rights and permissions any time you access your NextGen Patient Portal account. Care manager and dependent relationships can be terminated at any time by the care manager, the dependent or the practice.

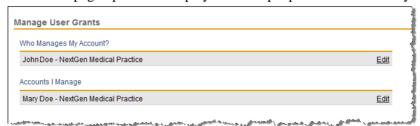
### Managing Care Manager Accounts

If configured by the practice, a person can be delegated to view or complete selected information (such as appointments and medications) on your behalf. You can change the information you want to manage, configure an expiration date when a person can no longer manage your account or remove a care manager from your account.

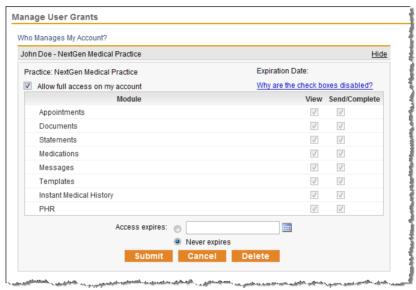
#### To manage people managing your account:

1 From either the My Account tab or the navigation pane, click the Manage User Grants link.

The Manage User Grants page opens and displays a list of people associated with your account.



2 In the Who Manages My Account section, click Edit link next to the person to view their rights and permissions.



If the person managing your account is allowed full access, all module check boxes (Appointments, Documents, etc.) are disabled.

- **3** To set individual view and access rights:
  - Clear the Allow full access to my account check box.
  - In the View column, select the check box next to each module that to enable the person managing your account to view related information. For example, open and read documents.
  - In Send/Complete column, select the check box next to each module that to enable the person managing your account to perform a related action. For example, make and confirm appointment requests.
- 4 To set an expiration date when the selected person can no longer manage your account:
  - Click the button next to "Access expires."
  - Click the Calendar 

    icon to select the date.

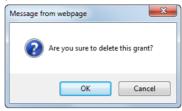
If you do not want the rights for selected person managing your account to expire, click Never expires.

**5** To remove a care manager from your account:

Note: This action does not delete the user, but only the access permissions to the account.

Click Delete.

A confirmation message displays.



> Click OK.

## Managing Dependent Accounts

If configured by the practice, you can act as a care manager and either view and/or send and complete selected information (such as appointments and medications) on behalf of another person (such as a son or daughter). If needed, you can remove yourself as a manager.

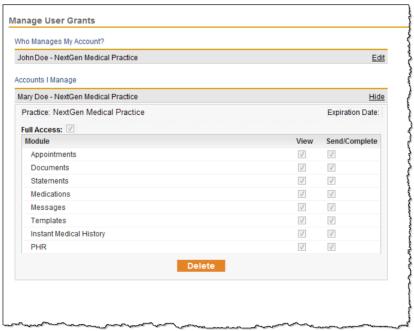
#### To remove a dependent from your account:

1 From either the My Account tab or the navigation pane, click the Manage User Grants link.

The Manage User Grants page opens and displays a list of people associated with your account.



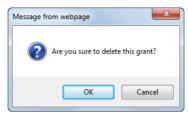
2 In the Account I Manage section, click Edit link next to the person to view their rights and permissions.



3 Click Delete.

Note: This action does not delete the user, but only the access permissions to the account.

A confirmation message displays.



4 Click OK.

## **Managing Practices**

The Managing Practices feature enables you to add additional practices to your NextGen Patient Portal account as well as un-enroll.

### Enrolling to Practices in the same Enterprise

You can easily enroll to multiple practices in the same enterprise when you log on to your NextGen Patient Portal account.

#### To enroll to practices in the same enterprise:

1 Log on to your NextGen Patient Portal account (see "Logging On to Your NextGen Patient Portal Account" on page 17).

The *Add new practices* page displays if your practice has enrolled you to NextGen Patient Portal in the same enterprise.



**2** Select the check box provided for the practice name.

Note: Select the Add Practice check box to select all practices.

3 Click Add Selected Practice(s).

The selected practices are added to your account and appear in the *Home* page and *Manage Practices* page.

You can perform the following additional actions:

- Click Decide Later to complete enrollment at a later point in time.
- Click Decline Pending Enrollment if you do not want to enroll to a practice(s).

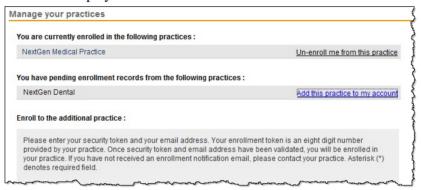
**Note**: If you decline enrollment the first time, you must request the practice to provide a security token to enroll again.

## Confirming Pending Enrollment Requests

This procedure will help you to enroll to a practice from the *Manage your practices* page.

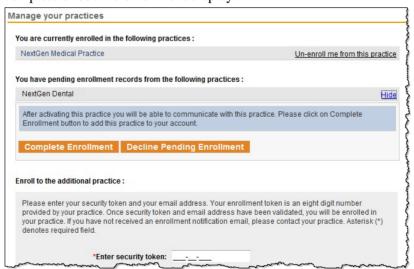
#### To confirm pending enrollment requests:

- 1 Log on to your NextGen Patient Portal account (see "Logging On to Your NextGen Patient Portal Account" on page 17).
- 2 In the My Account tab or navigation pane, click the Manage Practices link. The pending enrollments display.



**3** Click the Add this practice to my account link for the practice.

The buttons to complete or decline enrollment display.



4 Click Complete Enrollment.

The enrolled practice displays in the currently enrolled practices list and on the *Home* page.

Note: Click Decline Pending Enrollment if you do not want to enroll to a practice(s). If you decline enrollment, you must request the practice to provide a security token to enroll again.

## Enrolling in another Practice

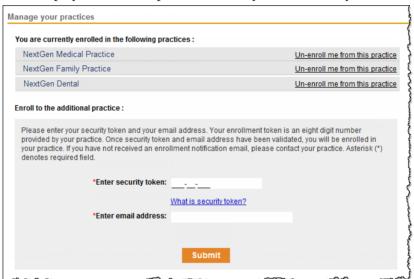
After completing your enrollment process with your initial practice, you can contact other practices to set up enrollment.

**Important**: Do not use the link provided in the enrollment notification email sent by an additional practice; use the following procedure instead.

#### To set up an account with another practice:

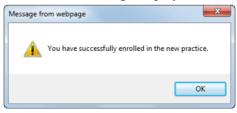
- 1 Log on to your NextGen Patient Portal account (see "Logging On to Your NextGen Patient Portal Account" on page 17).
- 2 In the My Account tab or navigation pane, click the Manage Practices link.

  An enrollment form displays and list the practices where you are currently enrolled.



- **3** Enter the Security Token number (without dashes) provided by the additional practice and your email address in the fields provided (both fields are required).
- 4 Click Submit.

Upon successful enrollment a confirmation message displays.



**5** Click **OK** to continue.

The added practice appears on the Enter new practice enrollment information form.

### Un-enrolling from the NextGen Patient Portal

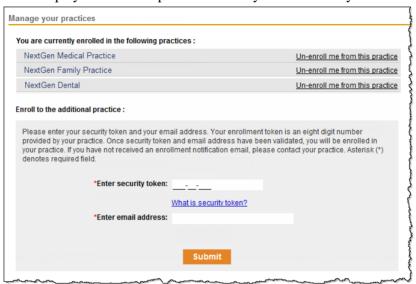
You can un-enroll from the NextGen Patient Portal at any time.

#### To un-enroll from the NextGen Patient Portal:

1 From either the My Account tab or navigation pane, click the Manage Practices link.

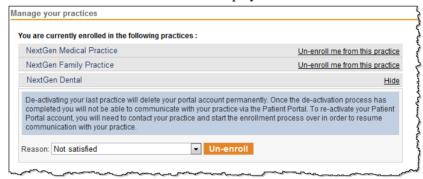
Note: You van also un-enroll from the Account Settings (see "Un-enrolling from the NextGen Patient Portal" on page 79) tab.

An enrollment form displays and list the practices where you are currently enrolled.



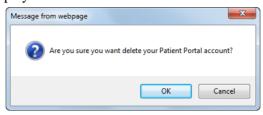
2 Click the Un-enroll me from this practice link.

A form to un-enroll from NextGen Patient Portal displays.



- **3** Select the Reason you are un-enrolling from the corresponding list.
- 4 Click Un-enroll.

A confirmation message displays.



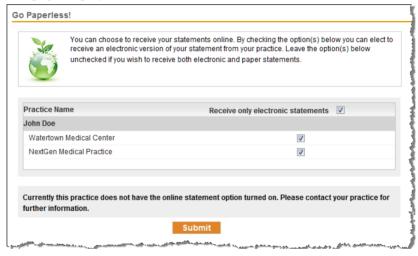
**5** Click **OK** to delete your NextGen Patient Portal account.

## Managing Statement Notifications

If enabled by your practice, you can select to receive only electronic statements through NextGen Patient Portal. If you do not select this option, you will receive both electronic and paper statements.

#### To manage your statement notifications:

1 From either the My Account tab or navigation pane, click the Statement Notifications link. The *Go Paperless!* page displays.



- **2** If you want to receive only online statements for all practices that provide this service, select the Receive only electronic statements check box.
  - If you want to receive both electronic and paper statements for all practices, clear the Receive only electronic statements check box.
  - If you are enrolled in multiple practices that provide this service and want to select different options for each practice, select or clear the corresponding check box as needed.
- 3 Click Submit.

# **Index**

A	I
Accepting a Pending Appointment Request • 62 Accessing Inbox items • 33 Accessing Sent Items • 47 Account Settings • 73	Inbox • 33 Internet Security • 10 Introduction • 9
Alerts and Appointment Reminders • 29	L
Appointments • 55	Locked Accounts • 22 Logging On to Your NextGen Patient Portal
Booking an Appointment • 58	Account • 17
C	Logging Out of Your NextGen Patient Portal Account • 23
Cancelling a Booked Appointment • 61	М
Cancelling an Appointment Request • 63 Changing Your Forgotten Password Question • 76 Changing Your Password • 74 Changing Your Security Question • 75 Changing Your User Name • 73 Composing Messages • 49 Confirming Pending Enrollment Requests • 90 Contents Pane • 19 Creating a New Password • 26  D Deleting a Pending Appointment Request • 64 Deleting Inbox Items • 45 Deleting Sent Items • 48	Mail • 33 Making Payments • 51 Managing Care Manager Accounts • 86 Managing Dependent Accounts • 88 Managing Practices • 89 Managing Statement Notifications • 93 Managing User Grants • 86 Managing Your Addresses • 79 Managing Your E-mail Addresses • 81 Managing Your Phone Numbers • 84 My Account • 73 My Appointments • 30 My Information • 78 My Medical Record • 31
Document Revision History • 4	N
Downloading and Saving Personal Health Records • 38	Navigation Pane • 20 NextGen Patient Portal Enrollment • 13
E	NextGen Patient Portal Web Account Access • 17
Email Notifications • 10	<b>O</b>
Enrolling in Another Practice • 91 Enrolling in NextGen Patient Portal • 13	
Enrolling to Practices in the same Enterprise • 89	Overview • 9
Н	P
Home Page • 29	Practice Headers • 20 Printing a Message • 46

#### R

Recovering Your User Name • 25
Renewing Medications • 65
Replying to Messages • 34
Requesting Personal Health Records • 54
Rescheduling a Booked Appointment • 60
Research Center • 70
Resetting Password with Reset Token • 26
Resetting Your Password • 23

#### S

Selecting Your Medical Practice • 66
Selecting Your Medication • 66
Selecting Your Pharmacy • 68
Sending a New Appointment Request from
Pending Requests • 62
Sent Items • 47
Showing/Hiding the Navigation Pane • 21
Starting an Appointment Request • 55
Submitting a Template • 41
Submitting an Appointment Request • 57
Submitting an Interactive Medical Form • 43
Submitting Your Request • 70

#### T

Tasks • 49 Transmitting Personal Health Record • 40

#### U

Un-enrolling from the NextGen Patient Portal • 77, 92
Updating Your Name and Date of Birth • 78
User Name and Password Recovery • 23

#### ٧

Viewing Audit History • 39 Viewing Documents • 36 Viewing Personal Health Records • 37 Viewing Statements • 50

#### W

Web Browser Requirements • 10