2.4.1

NextGen Patient Portal

User Guide

NEXTGEN®
HEALTHCARE
www.nextgen.com

Document Revision History

App Version	Date	Document Version	Summary of Changes
2.4.1	11/03/2017	14.0	Initial Release for 2.4.1
2.4	09/18/2017	13.0	General Release for 2.4
2.4	06/15/2017	12.0	Initial Release for 2.4
2.3	10/24/2016	11.0	General Release of 2.3
2.3	12/14/2015	10.0	Initial Release of 2.3
2.2.4	03/24/2016	9.0	Added a section for Results: Not Available Within My Chart feature
2.2..2	11/23/2015	8.0	Updated references to Password character requirements throughout the document
2.2.	06/26/2015	7.0	General Release of 2.2
2.1.1	01/30/2015	6.0	General Release
2.1	11/13/2014	5.0	General Release
2.0	07/10/2014	4.0	Updated the “Sending the PHR” section
2.0	07/03/2014	3.0	Updated the "Saving Personal Health Records" section
2.0	06/30/2014	2.0	General Release
2.0	06/27/2014	1.0	Initial Release

Contents

CHAPTER 1

Features of NextGen Patient Portal

NextGen® Patient Portal provides you with a fast, reliable, and easy-to-use method to communicate with your medical service provider through a convenient, safe, and secure environment. You can:

- 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 Interactive Medical Forms
- Request Personal Health Record (PHR)
- View the chart with health record details
- Receive and review documents
- Receive and review patient education material
- Update account information
- View statements online
- Make payments online

Note: If your practice has customized NextGen Patient Portal, some of the features listed and described throughout this document may not be available on your NextGen Patient Portal account.

Web Browser Requirements

NextGen Patient Portal works best with the following:

- Microsoft® Internet Explorer® 11.0 or later
- Mozilla® Firefox® 54.0 or later
- Google Chrome™ 59.0 browser or later
- Opera™
- Safari 9.1 or later
- 128-bit Secure Sockets Layer (SSL) encryption

The latest versions of internet browsers, 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 not, visit the respective company website and upgrade your web browsers.

Internet Security Considerations for NextGen Patient Portal

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

- Select a password that is easy to remember but difficult for others to guess. Passwords are case sensitive, must be between 8 and 50 characters, and can include numbers and special characters.
- Never save user names and passwords for any websites on the internet. Saving a password can be useful, but can put your personal information at risk. If possible, you should disable the save password option so no one else can log on to your account.
- For a public or shared computer, it is important that you always log off completely by clicking the Log Out option. Logging off makes it impossible for any other person (using the same computer) 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.
- Keep your computer antivirus program up-to-date and make use of a firewall.
- Do not leave your computer unattended while logged on to NextGen Patient Portal. If you have to leave your computer unattended, log off from all programs and close all the open windows that may display sensitive information. You are automatically logged off if there is no online activity for 20 minutes.

Caution: To comply with the Health Insurance Portability and Accountability Act (HIPAA) and the Certification Commission for Healthcare Information Technology (CCHIT®) requirements for security of patients' medical information, NextGen Healthcare strongly recommends that any and all instances of patients' Protected Health Information (PHI) that are stored on portable media devices be encrypted using the Advanced Encryption Standard (AES) – 128-bit or higher.

Email Notifications

You will receive an email notification in the following cases:

- When you receive any correspondence from the practice, such as appointments, documents, statements, medications, messages, templates, interactive medical forms, personal health record.
- When your practice locks or unlocks your accounts.

Note: 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 PatientPortal-noreply@Nextgen.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 PatientPortal-noreply@Nextgen.com.

CHAPTER 2

Enroll in NextGen Patient Portal

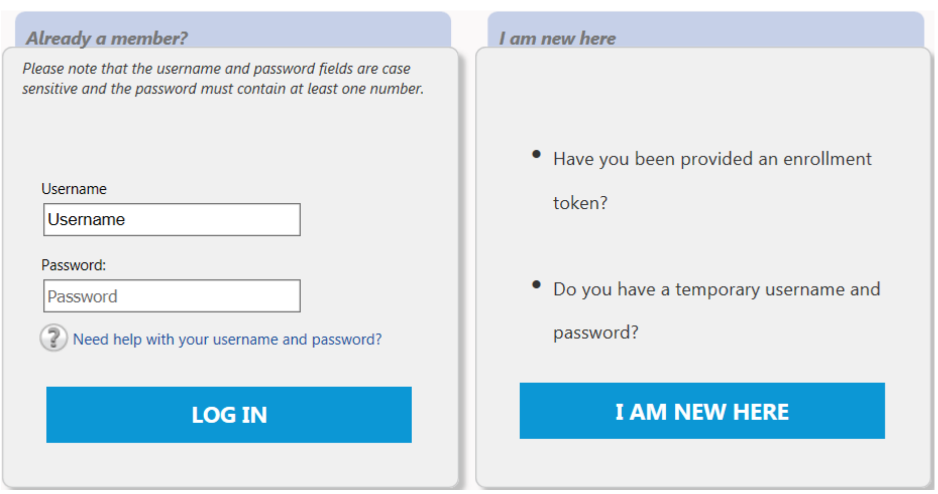
You can enroll in NextGen Patient Portal in any of the following ways:

- **Token-based enrollment:** If your practice initiates the enrollment and provides you with a token, use the token to complete enrollment. For more information about token-based enrollment, see the Enroll in NextGen Patient Portal with a Token (on page 9) section.
- **Automatic enrollment:** If your practice provides you with a temporary user name and password, log on to NextGen Patient Portal with the credentials and activate your portal account. For more information about auto enrollment, see the Enroll in NextGen Patient Portal with Temporary Username and Password (on page 12) section.
- **Patient-initiated enrollment:** If your practice provides you with the portal website link or instructs you to enroll by using the patient portal link on the practice website use the link to enroll yourself. For more information about enrolling in NextGen Patient Portal by yourself, see the Self-enroll with NextGen Patient Portal (see "Enroll in NextGen Patient Portal by Yourself" on page 15) section. After you send the enrollment request, your practice will approve your NextGen Patient Portal account.

Enroll in NextGen Patient Portal with a Token

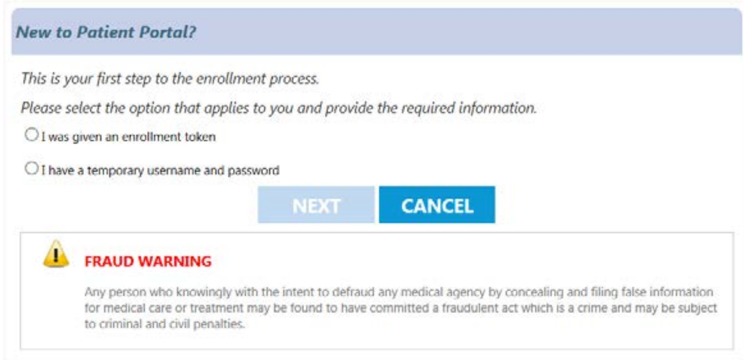
Ensure that you have received a token number from your practice. You must provide your email address and date of birth to enroll. If you have not provided an email address to the practice, you can provide the patient’s last name.

1 Access NextGen Patient Portal.

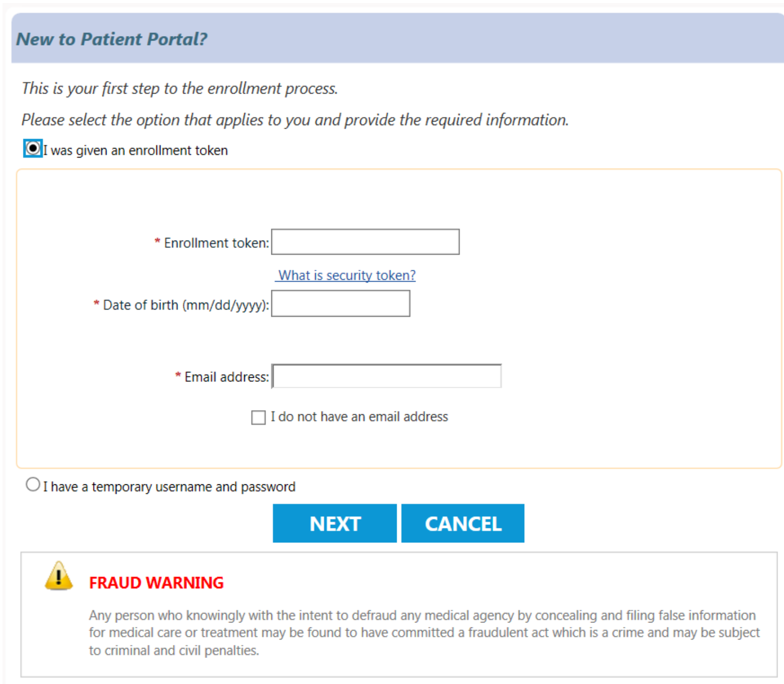


2 Click **I Am New Here.**

3 Read the terms and conditions, and then click **I Accept**.



4 Click **I was given an enrollment token**.



5 Enter the token number, and your date of birth.

6 Enter your email address in **Email Address**.

Note: If you do not have an email address click **I do not have an email address**, and then enter your last name.

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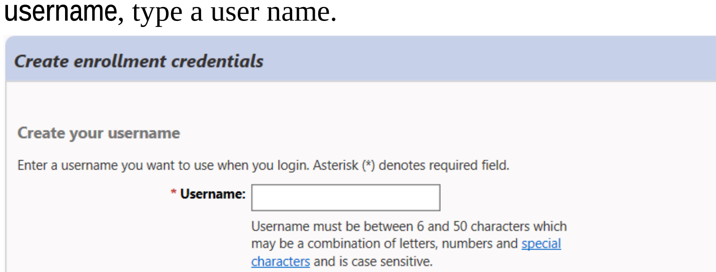
7 Click **Next**.

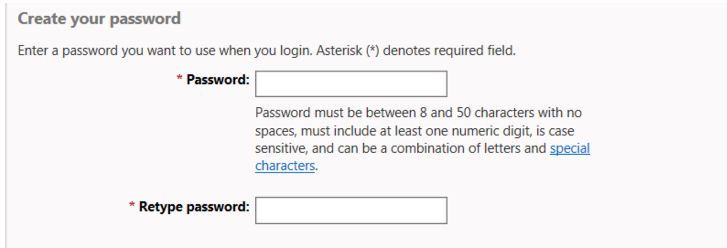
8 Under **Create your username**, type a user name.



9 Under **Create your password**, do the following:

a) Type a password.

b) Re-type the password to confirm it.

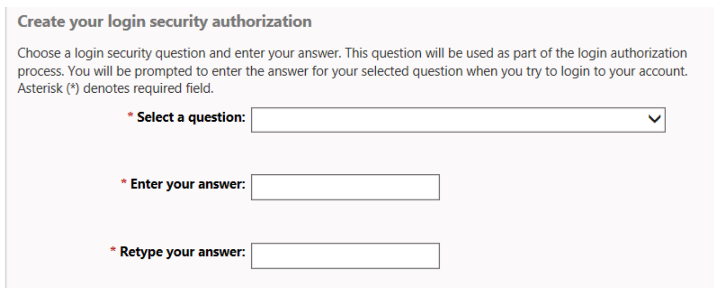


10 Under **Create your login security authorization**, do the following:

a) Select a security question.

b) Type a security answer.

c) Re-type the security answer.



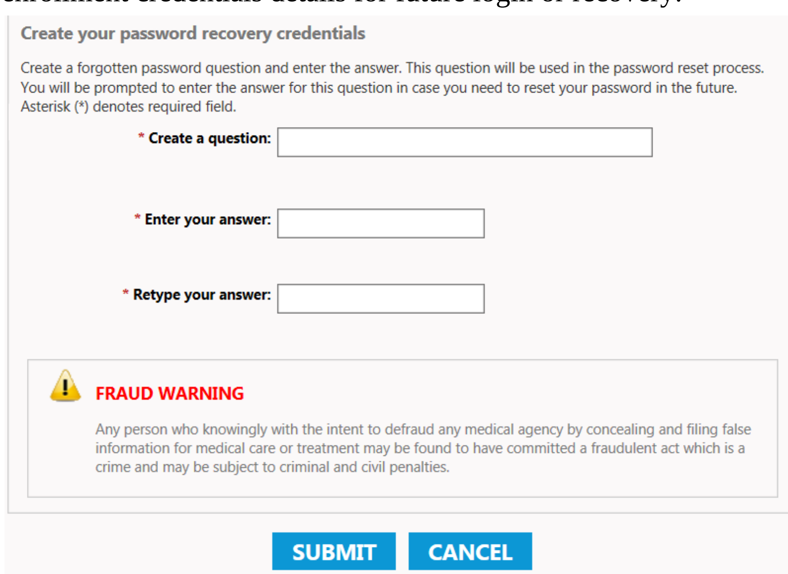
11 Under **Create your password recovery credentials**, do the following:

a) Type a recovery question.

b) Type an answer for the recovery question.

c) Re-type an answer for the recovery question.

Make a note of enrollment credentials details for future login or recovery.

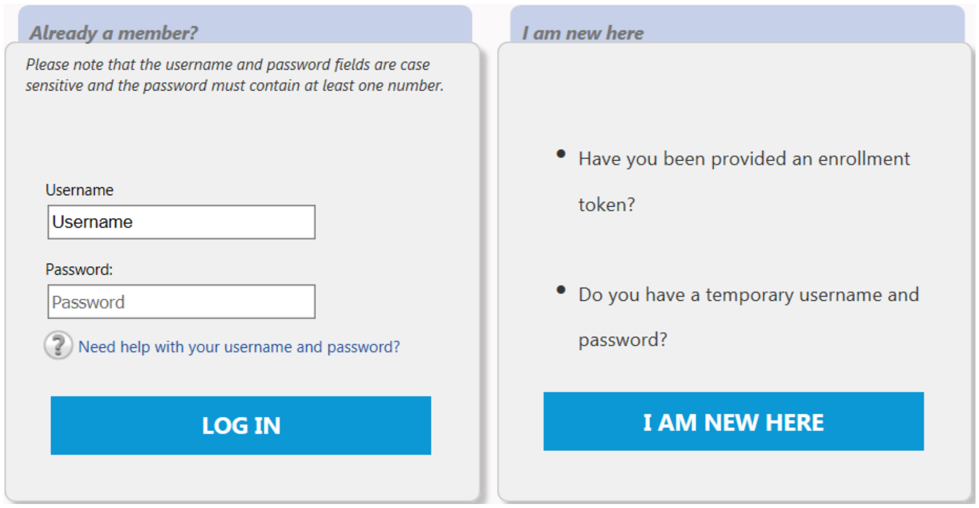


12 Click **Submit**.

Enroll in NextGen Patient Portal with Temporary Username and Password

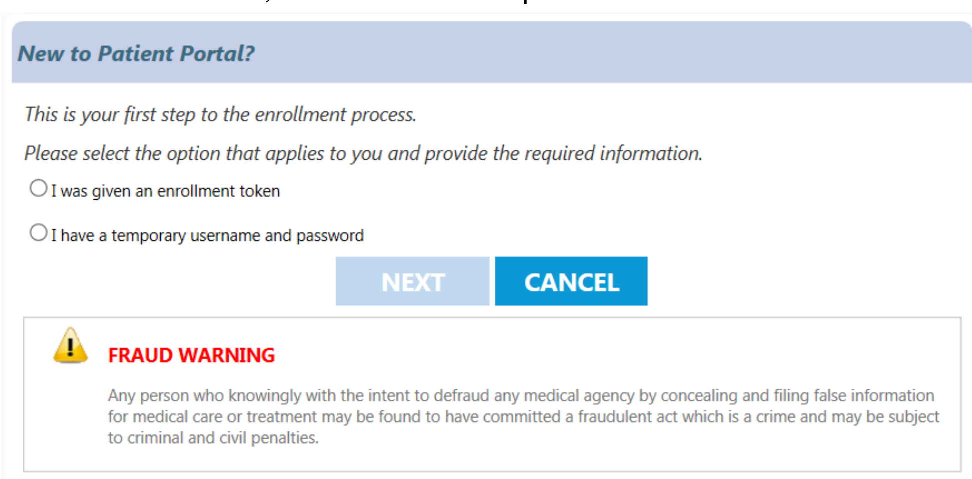
If your practice has provided you with a temporary user name, password, and answer for the security question then you can log on to NextGen Patient Portal and activate your account.

1 Access NextGen Patient Portal.



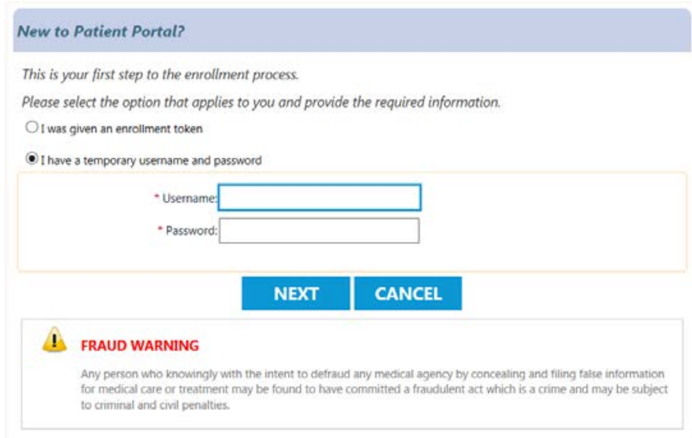
2 Click **I Am New Here**.

3 Read the terms and conditions, and then click **I Accept**.

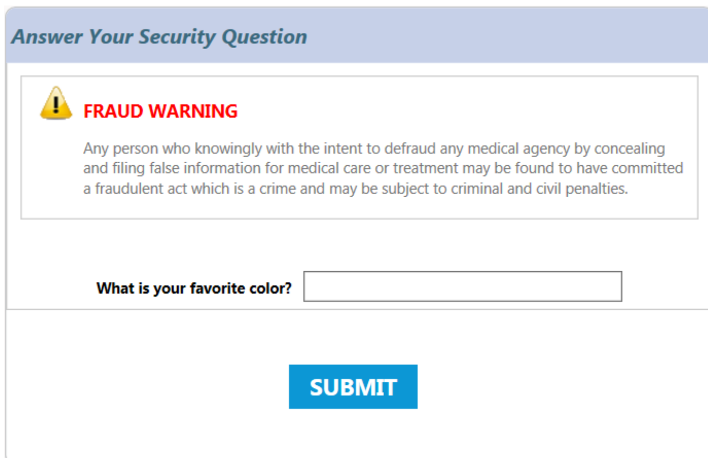


4 Click **I have a temporary username and password**.

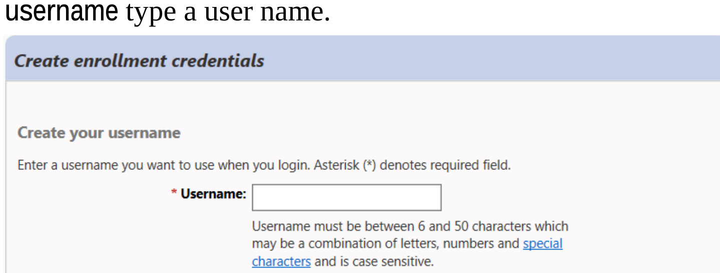
5 Type the temporary **Username** and **Password** received from practice, and then click **Next**.



6 Type the answer for your security question received from practice, and then click **Submit**.



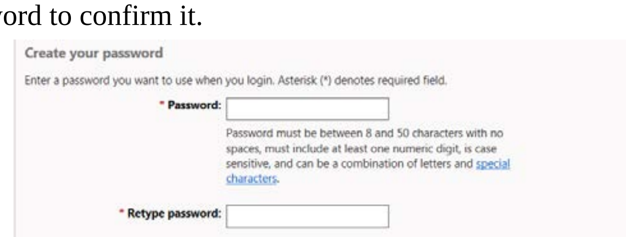
7 Under **Create your username** type a user name.



8 Under **Create your password**, do the following:

a) Type a password.

b) Re-type the password to confirm it.

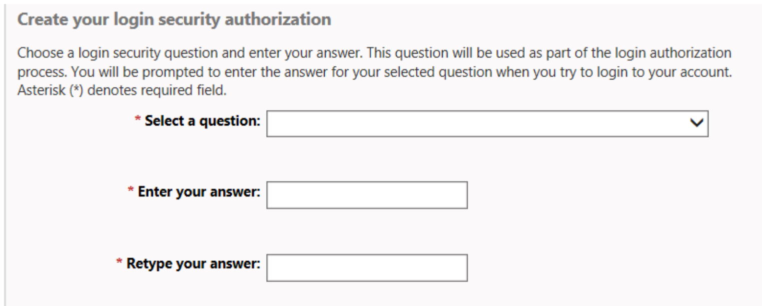


9 Under Create your login security authorization, do the following:

a) Select a security question.

b) Type a security answer.

c) Re-type the security answer.



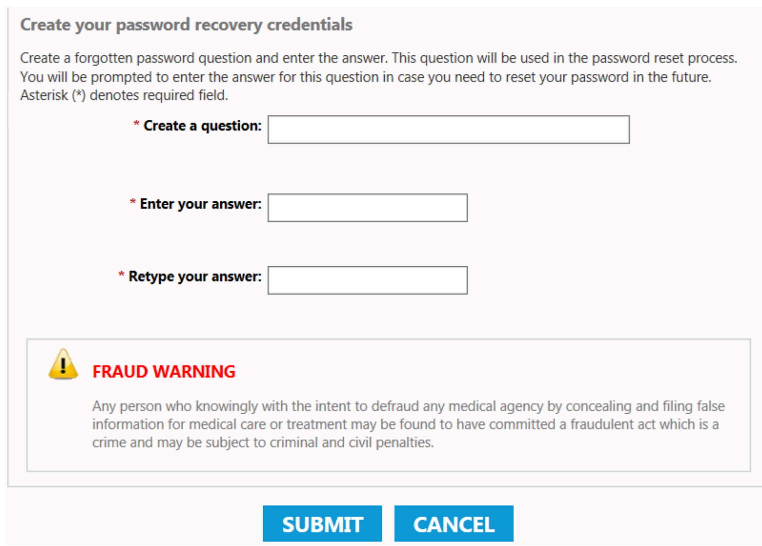
10 Under Create your password recovery credentials, do the following:

a) Type a recovery question.

b) Type an answer for the recovery question.

c) Re-type an answer for the recovery question.

Make a note of enrollment credentials details for future login or recovery.



11 Click Submit.

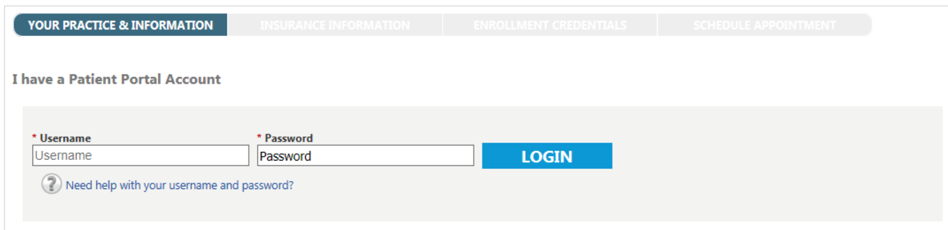
Enroll in NextGen Patient Portal by Yourself

If your practice provides you with a portal website enrollment link and asks you to enroll yourself, you can use the link to self-enroll in NextGen Patient Portal by yourself.

1 Access NextGen Patient Portal.

2 Read the terms and conditions, select I have read and agreed to the Terms and Conditions, and then click Continue.

3 Under Your Practice & Information tab, if you have an existing NextGen Patient Portal account, type your user name and password.

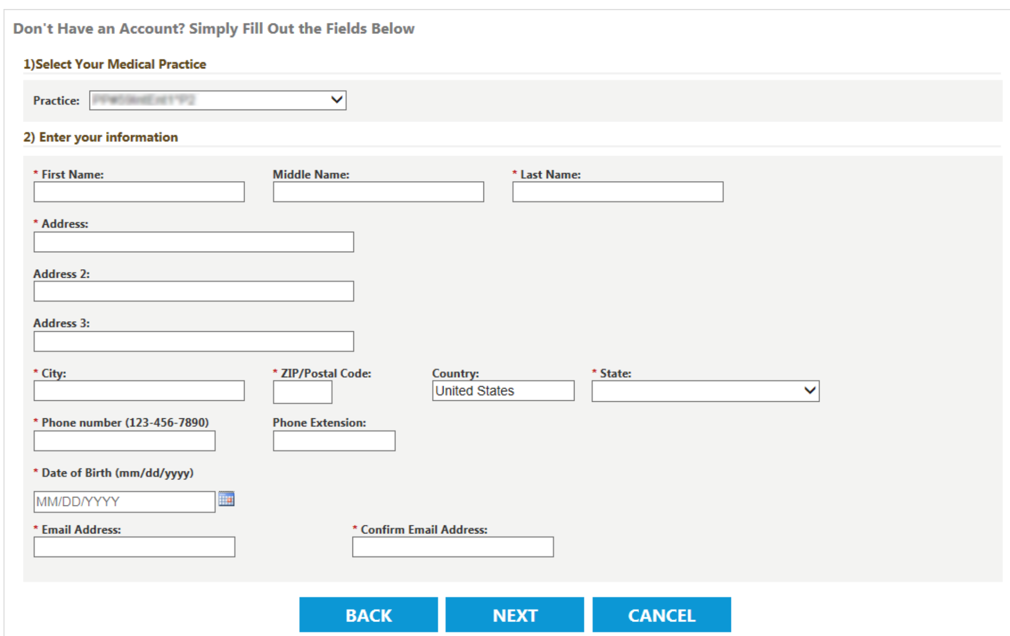


If you do not have an account, do the following:

a) Under Select Your Medical Practice, select your practice from Practice.

b) Under Enter your information, enter your information such as name, address, phone number, date of birth, and email address.

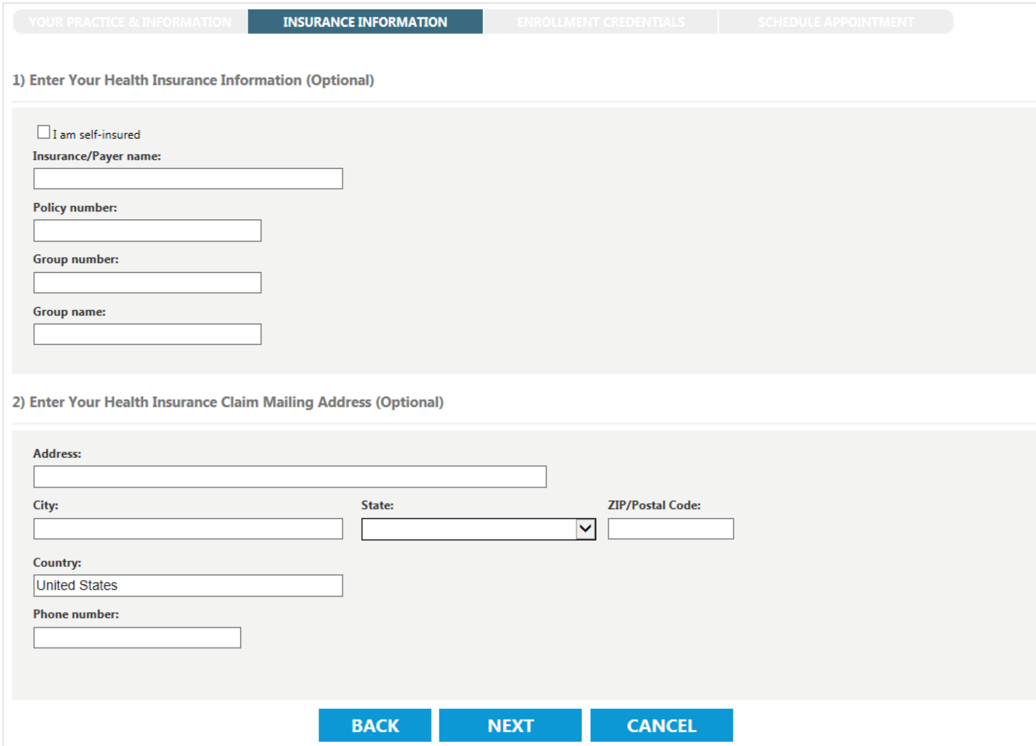
c) Click Next.



4 Under **Insurance Information**, enter the following details (these details are optional):

a) Your health insurance information

b) Your health insurance claim mailing address



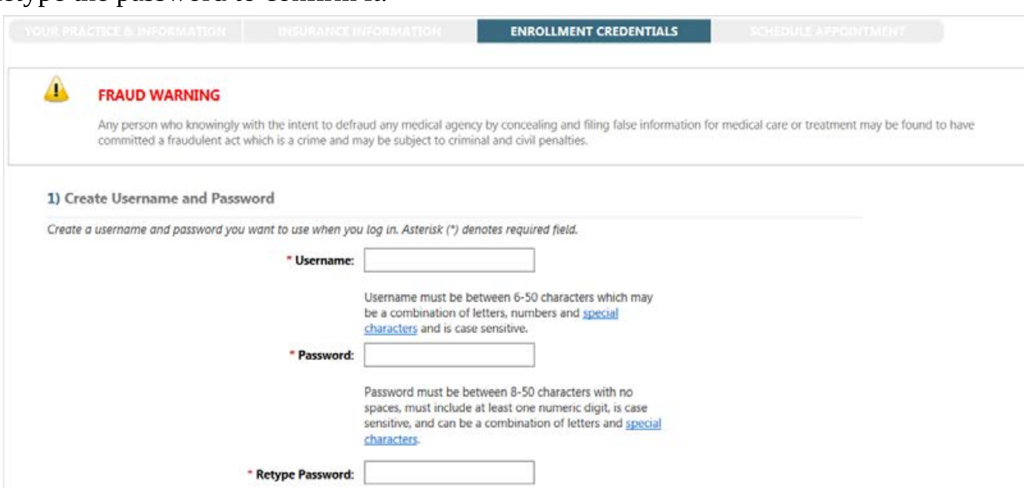
5 Click **Next**.

6 Under **Create Username and Password** enter the following details:

a) Type a user name.

b) Type a password.

c) Retype the password to confirm it.

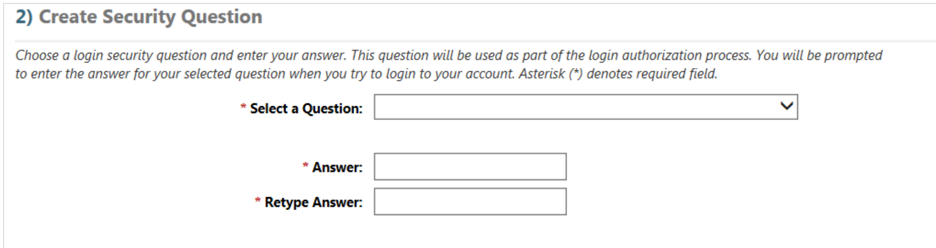


7 Under Create Security Question, do the following:

a) Select a security question.

b) Type a security answer.

c) Re-type the security answer.

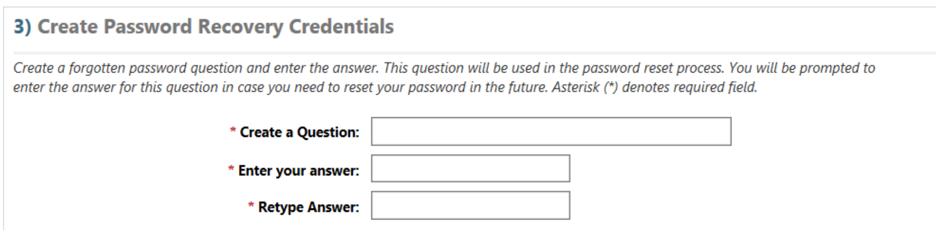


8 Under Create Password Recovery Credentials, do the following:

a) Type a recovery question.

b) Type an answer for the recovery question.

c) Re-type an answer for the recovery question

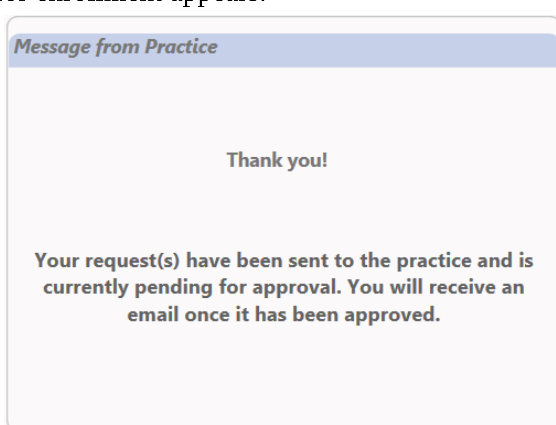


9 Perform any one of the following:

a) To schedule an appointment, click Schedule an Appointment. For more information about schedule and appointment, see the Schedule an Appointment (see "Your Appointments" on page 42) section.

b) To complete enrollment, click Complete Enrollment.

A confirmation message for enrollment appears.



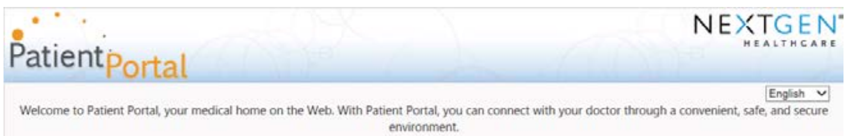
CHAPTER 3

NextGen Patient Portal Web Account Access

After you have successfully enrolled (see "Enroll in NextGen Patient Portal" on page 9) in NextGen Patient Portal, you can access your NextGen Patient Portal account.

Change NextGen Patient Portal Language

NextGen Patient Portal provides multi-language support. The website displays in English by default. You can change your preferred language before or after you logon.

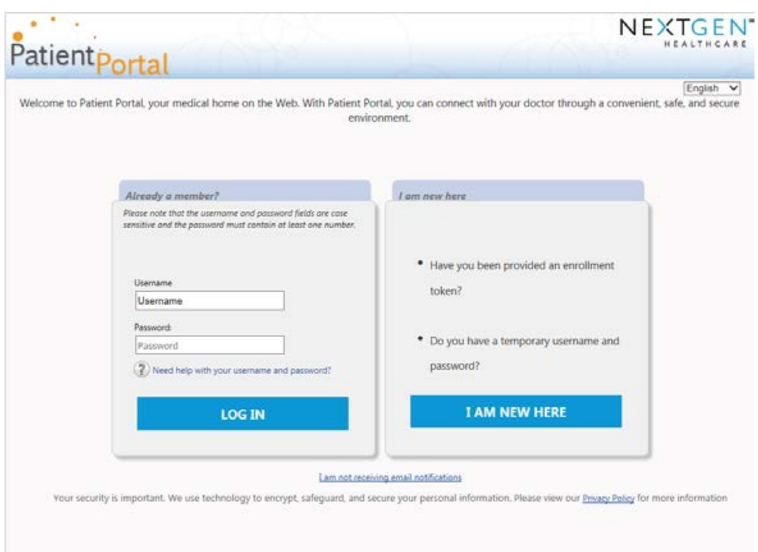


- To change the language before you log on, from the list on the top-right corner of the page, select the language.

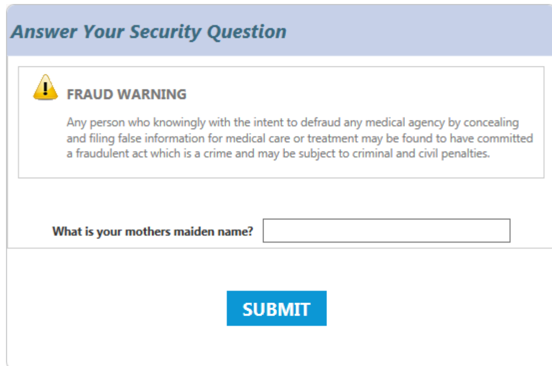
- To change the language after you log on, from the list on the bottom-right corner of the page, select the language.

Log On to your NextGen Patient Portal Account

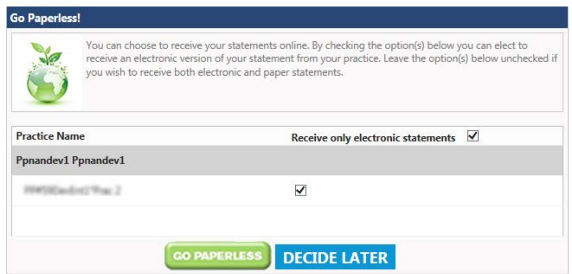
1 Access the NextGen Patient Portal website.



2 Enter your User Name and Password, and then click Log In. Both the user name and password are case sensitive.

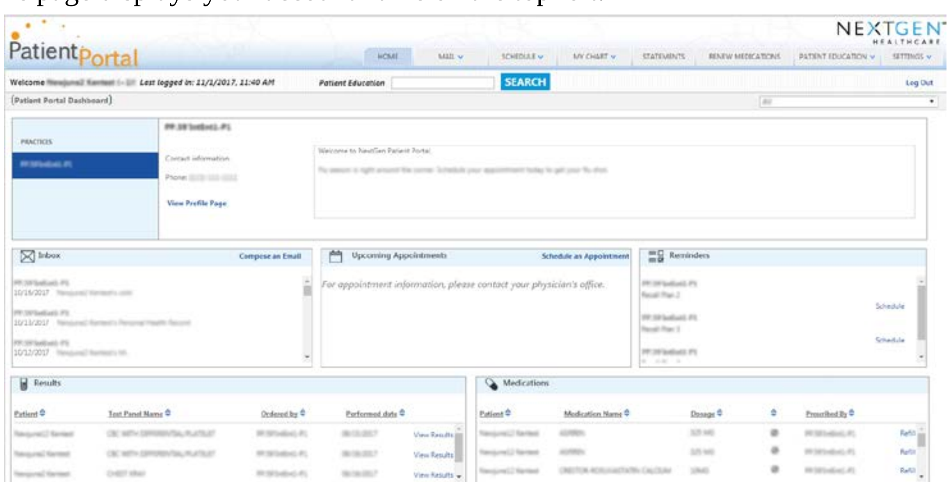


3 Enter the requested security information, and then click Submit.



The practice in which you are currently enrolled can provides you with an option to receive only electronic statements. If you are enrolled to receive only electronic statements, click Go Paperless. Otherwise click Decide Later. You can register your preference later. For more information about enabling this notification, see the Manage Statement Notifications (on page 89) section.

Your Home page displays your account name on the top left.



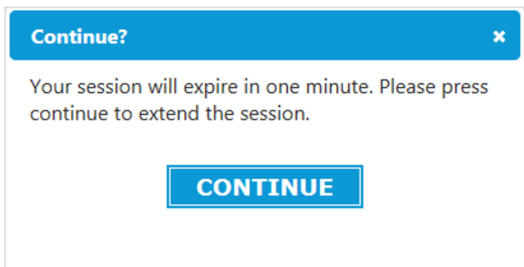
- Your Home page contains the following information:
  - Practice information
  - The most recent message from your Inbox
  - Upcoming appointments
  - Reminders
  - Recent lab results and medications

Log Off from NextGen Patient Portal Account

To logout from your NextGen Patient Portal account, click the **Log Out** link at the top of the page.

NextGen Patient Portal Session Time Out

If NextGen Patient Portal does not detect any activity for more than 20 minutes, it automatically logs you off. Before logging you off, the portal prompts you to extend the session. Click **Continue** to extend the session.

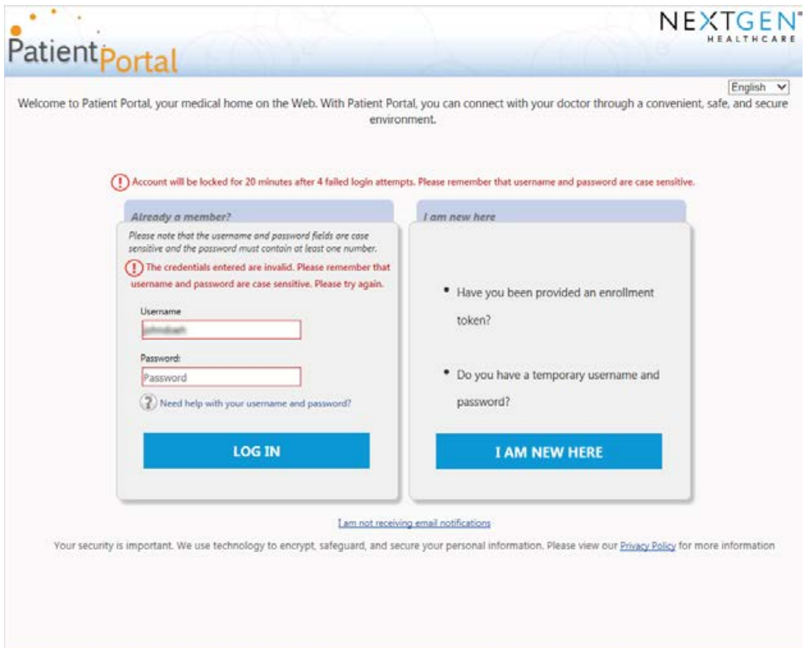


Recommendation: NextGen Healthcare recommends you to log off before exiting the NextGen Patient Portal website, it will help you to secure your health information.

Locked Accounts

You cannot access your NextGen Patient Portal account:

- If you type incorrect logon details four times consecutively, the portal locks your account. After your second and third failed attempts to logon, NextGen Patient Portal displays the following alert message.



  Your account will be automatically unlocked only after 20 minutes.

- If the practice locks your account, you will receive an email stating that you need to contact the practice to unlock your account. During this time, you will not be able to access any mail or perform any tasks (except for the Research Center). When the practice unlocks the account, you will receive another email stating that the account has been unlocked.

Change the User

The Patients list on the top right displays the name of the logged in user. If your account is associated with multiple accounts, the patients list also displays a list of the persons or dependents whose accounts you manage. You can select the name of a person or dependent from this list to view their records.

Recovering Log On Details

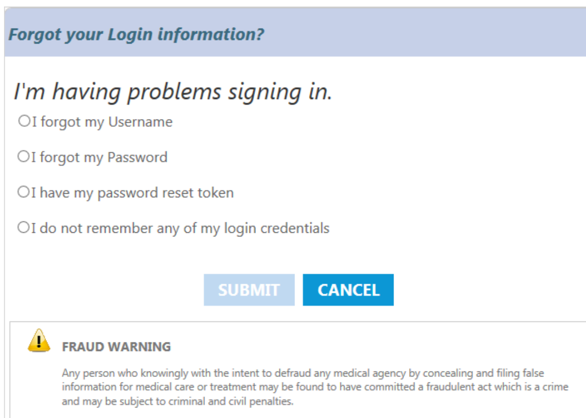
You can reset your password using:

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

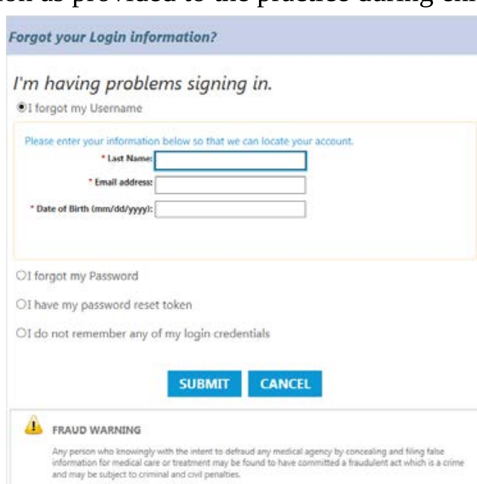
Note: You can reset your username or password yourself only if you have provided the practice with your email address for the NextGen Patient Portal account during enrollment. When you submit a password/username reset request, a notification containing the username or password reset link is sent to your registered email account. If you have not provided your email address during enrollment, you must contact your practice to have your password/username reset.

Recover your NextGen Patient Portal User Name

1. Go to the NextGen Patient Portal website logon page.
2. Click **Need help with your username and password.**



3. Click **I forgot my Username.**
4. Type the requested information as provided to the practice during enrollment.



5 Click **Submit**.

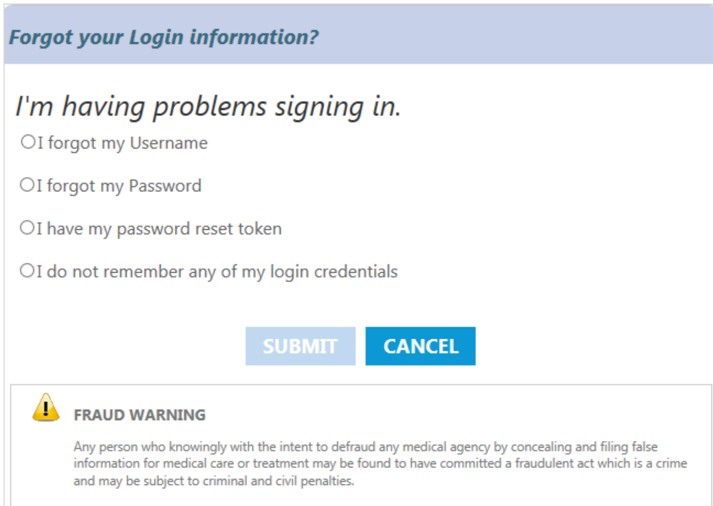
A message appears notifying you that an email containing your user-name has been successfully sent to your email.

6 Open the email to view your username.

Reset your NextGen Patient Portal Password

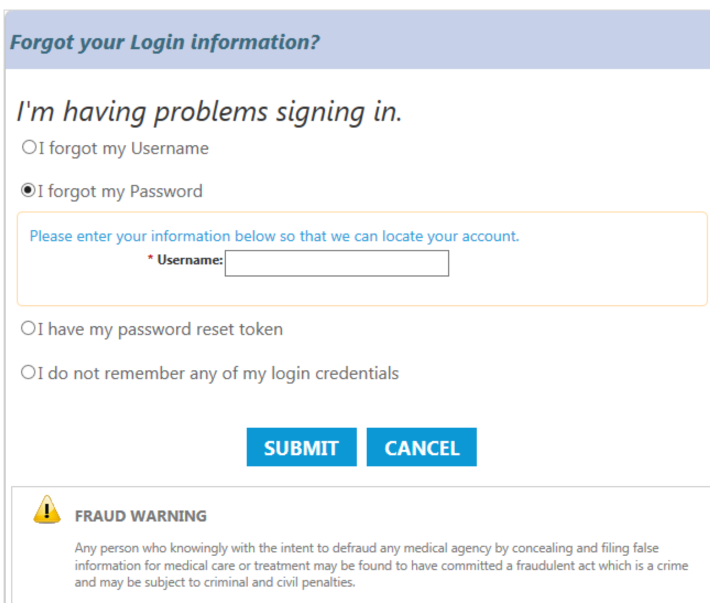
1 Go to the NextGen Patient Portal website logon page.

2 Click **Need help with your username and password**.



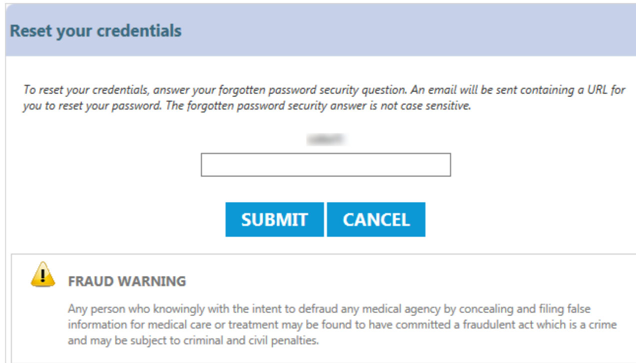
3 Click **I forgot my Password**.

4 Type your username.



5 Click **Submit**.

6 Type the answer for the security question, and then click **Submit**.
A message appears notifying you that an email containing your password reset link has been sent.



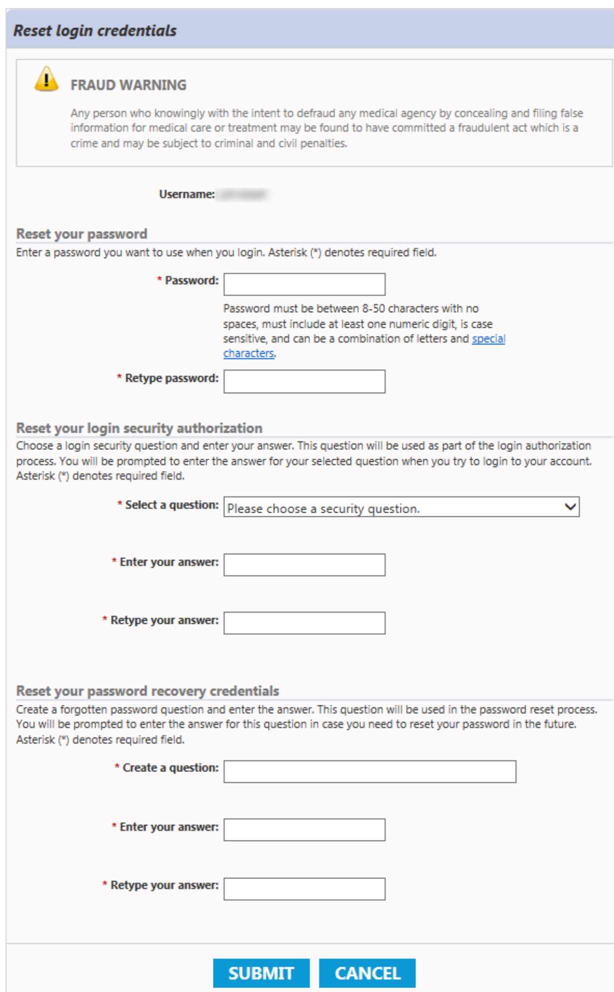
7 Open the email you received, and then click the **Forgot Password Link**.

8 Enter the following information under the following:

a) Reset your password

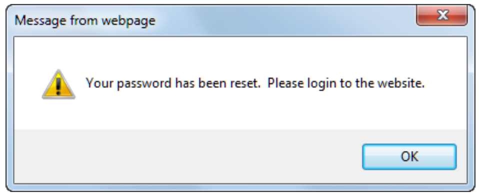
b) Reset your logon security authorization

c) Reset your password recovery credentials



9 Click **Submit**.

A message appears notifying you that an email containing your password has been sent.



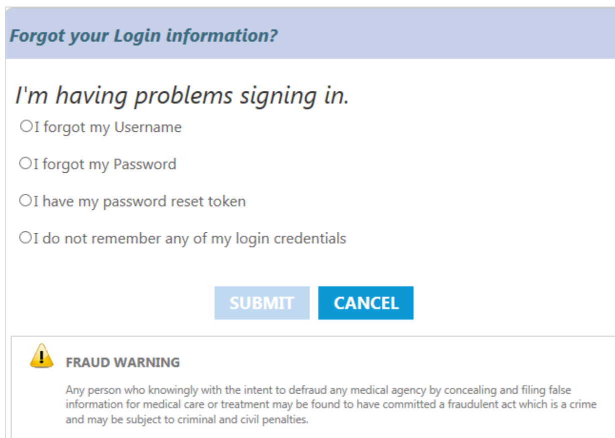
10 Click **OK** to continue. The Login page appears.

11 Log on using your username and the new password.

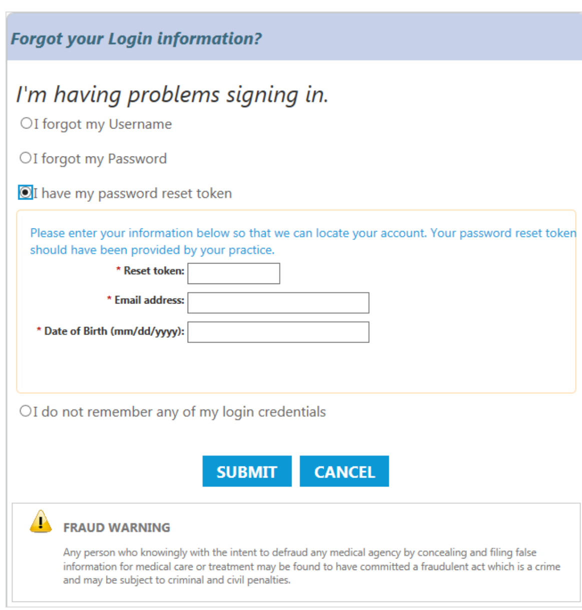
Reset Your Password with a Reset Token

1 Go to the NextGen Patient Portal website logon page.

2 Click **Need help with your username and password**, and then select **I have my password reset token**.



3 Enter the requested information.



4 Click **Submit**.

A message appears notifying you that an email containing your reset password link has been sent.

5 Open the email you received and click the **Forgot Password Link**.

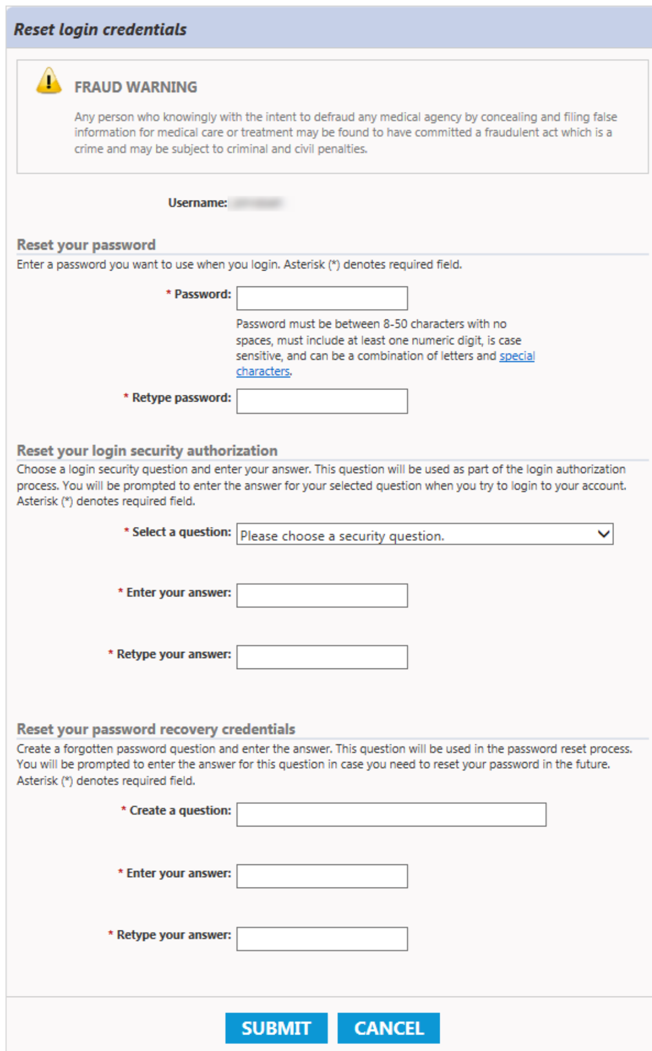
6 In the **Enter password reset token** field, enter the same reset token as the one you used in step 4, and then click **Submit**.

7 Enter the following information under the following:

a) Reset your password

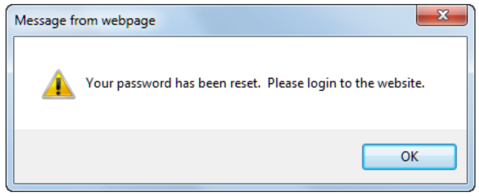
b) Reset your logon security authorization

c) Reset your password recovery credentials



8 Click Submit.

A message appears notifying you that an email containing your password has been sent.

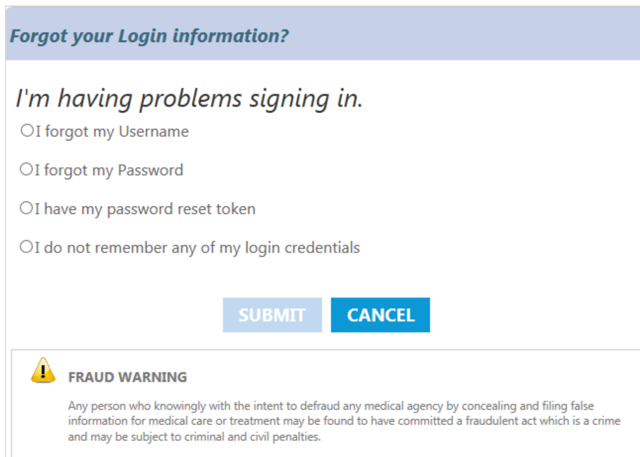


9 Click OK to continue. The Login page appears.

10 Log on using your username and the new password.

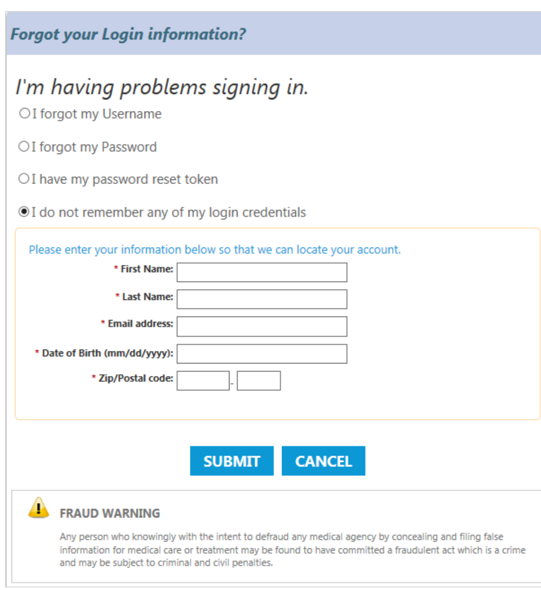
Reset your Password without Using Log On Credentials

1 Go to the NextGen Patient Portal website logon page.



2 Click I do not remember any of my login credentials.

3 Enter the requested information.



4 Click Submit.

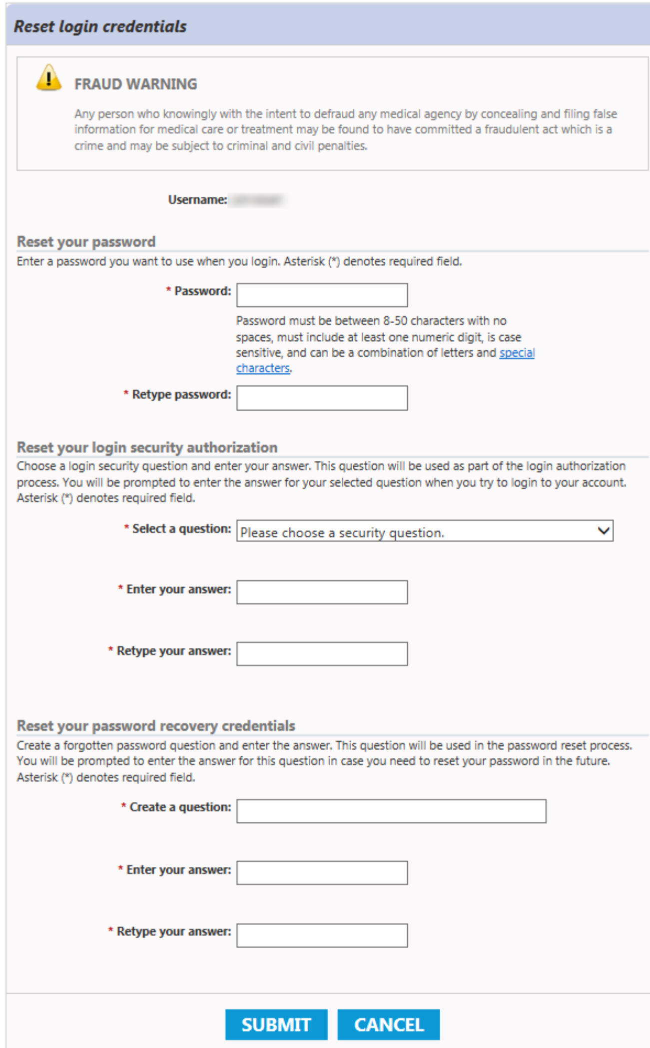
5 Open the email you received, and then click the link to reset your credentials.

6 Enter the following information under the following:

a) Reset your password

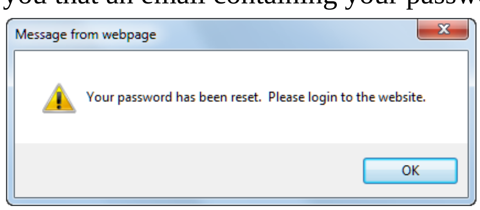
b) Reset your logon security authorization

c) Reset your password recovery credentials



7 Click **Submit**.

A message appears notifying you that an email containing your password has been sent.



8 Click **OK** to continue. The Login page appears.

9 Log on using your username and the new password.

CHAPTER 4

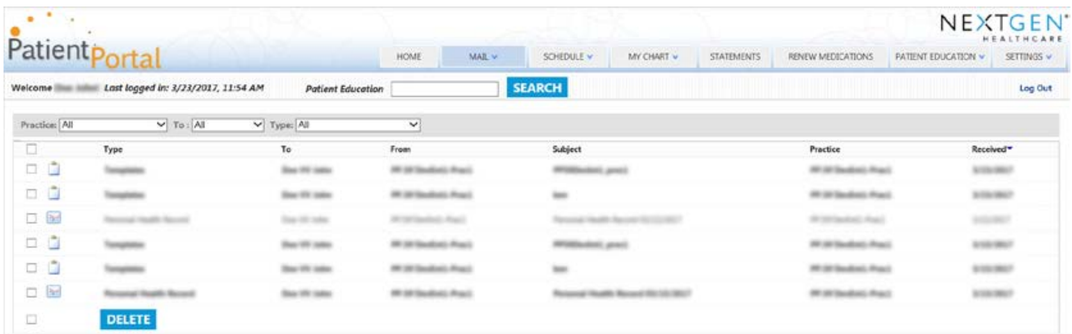
Your Mail

You can send messages, view messages, or reply to messages sent by your practice. You can also perform the following:

- View documents sent by your practice
- View appointments
- View medications
- Make payments
- Complete and submit online forms
- Complete and submit Interactive Medical History forms
- Access Personal Health Record
- Access communications regarding appointments

View Your Messages

You can view inbox messages, documents, forms, PHR, and interactive forms sent from your practice. On the NextGen Patient Portal home page, click the Mail tab, and then select Inbox.



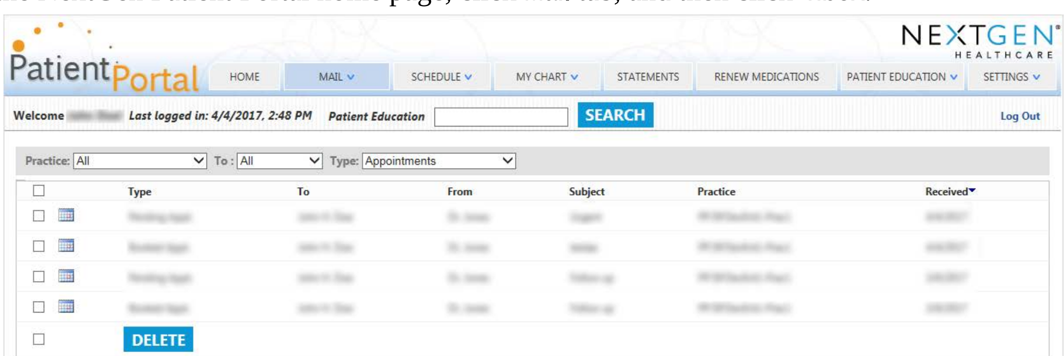
From the Inbox, you can:

- View your appointments from inbox: For more information about view your appointments from inbox, see the View Your Appointments from Inbox (on page 30) section.
- View attached documents: For more information about view attached documents, see the View Attached Documents (on page 31) section.
- Access statement from inbox: For more information about access statement from inbox, see the Access Statement from Inbox (see "Access Statements from Inbox" on page 32) section.
- View medications: For more information about view medications, see the View Medications (on page 33) section.
- View messages: For more information about view messages, see the View Messages (on page 34) section.
- Reply to messages: For more information about replying to messages, see the Reply to Messages (on page 35) section.
- Submit a form: For more information about submit a form, see the Submit a Form (on page 35) section.
- Submit an interactive medical form: For more information about submit an interactive medical form, see the Submit an Interactive Medical Form (on page 37) section.
- View Personal Health Records: For more information about view Personal Health Records, see the View Personal Health Records (PHR) (on page 38) section.
- Delete inbox items: For more information about delete inbox items, see the Delete Inbox Items (on page 39) section.
- Print inbox items: For more information about print inbox items, see the Print Inbox Items (on page 39) section.

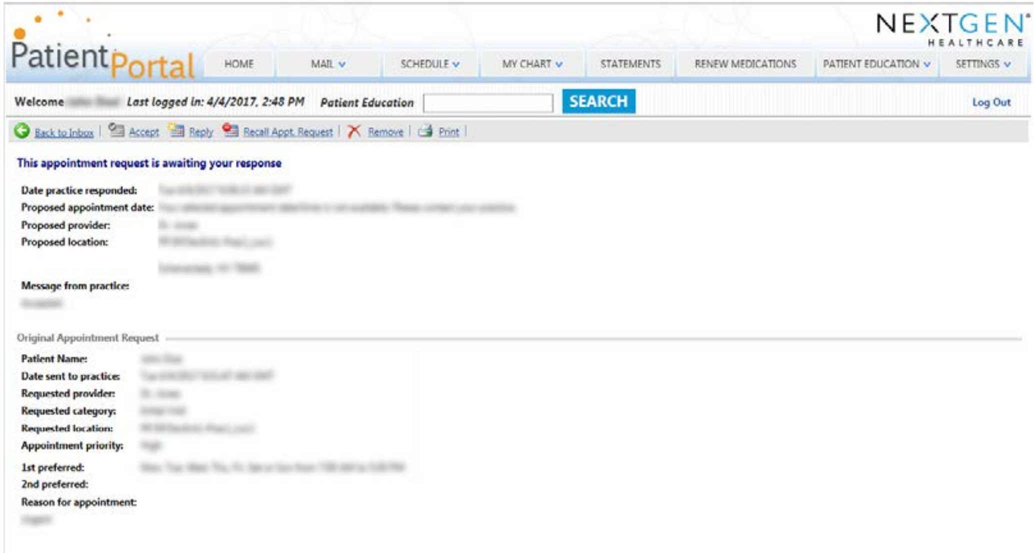
View Your Appointments from Inbox

You can view your appointments, and respond to pending appointment requests, if required. Pending appointments are those appointments that need to be accepted by you. Booked appointments are appointments which are accepted by you or an appointment scheduled with your practice.

1 On the NextGen Patient Portal home page, click Mail tab, and then click Inbox.



2 From the **Type** list, select **Appointments**, and then click an appointment communication.



3 Depending on the type of appointment, you can:

a) Accept an appointment.

b) Reply to an appointment request with a reason.

c) Recall an appointment request.

d) Print an appointment.

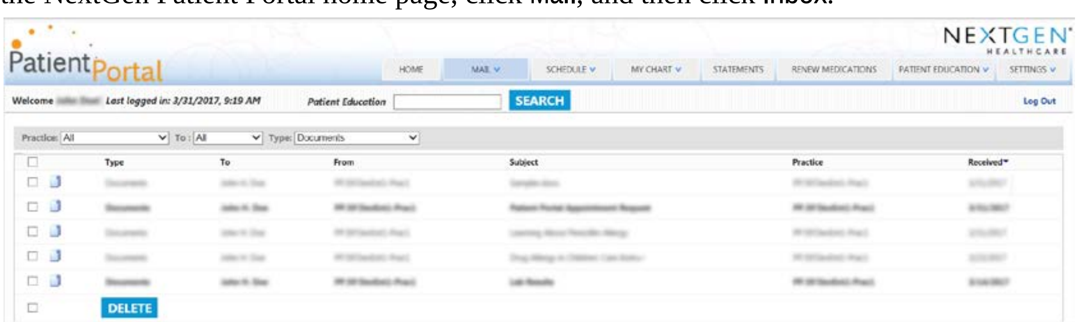
e) Export your booked appointment to a Calendar.

f) Remove an appointment. (Removing an appointment is not the same as cancelling your appointment in the practice scheduled appointment list).

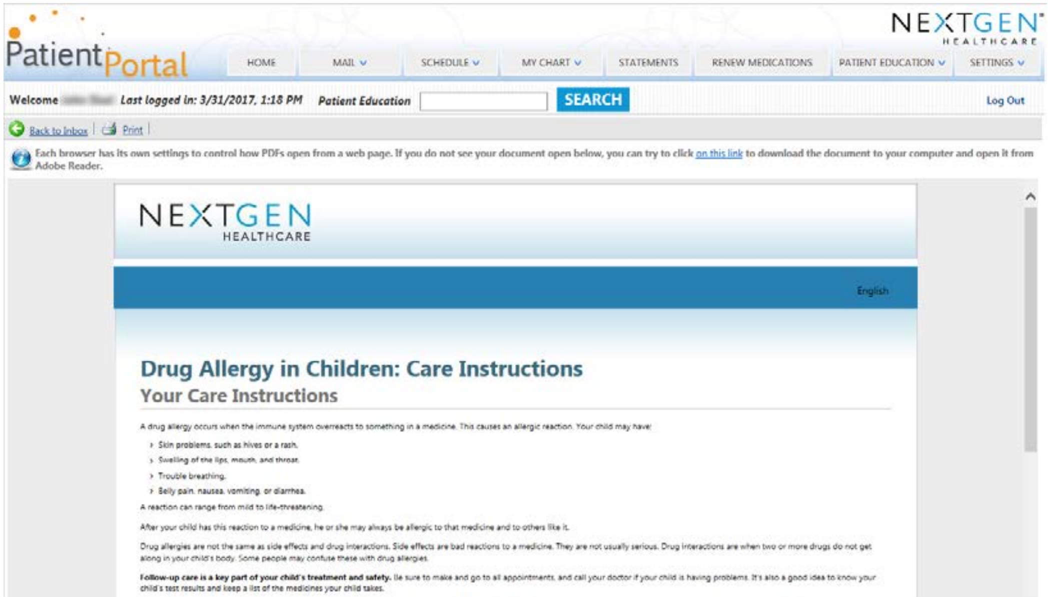
View Attached Documents

You can view documents shared by your practice. To view attached documents you require Adobe® Acrobat® Reader. If you do not have it installed, you can download and install it from the Adobe website https://get.adobe.com/reader/.

1 On the NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.



2 From the **Type** list, select **Documents**, and then click a document communication. If you are not able to view your document, click **on this link** to download the attached document and open it with Adobe Reader.

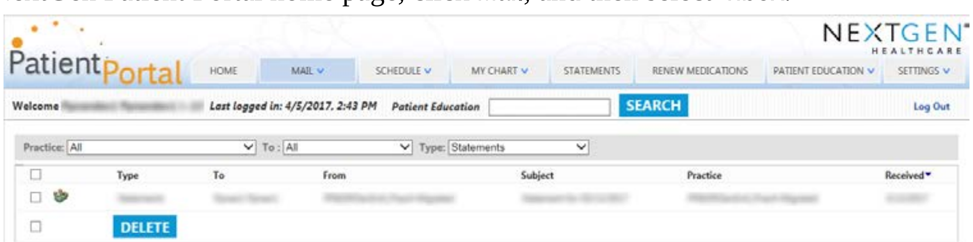


The comments entered by your practice appear on **Document Comments**. You can view your practice comment in the Document Comments window, if you are viewing the document for the first time.

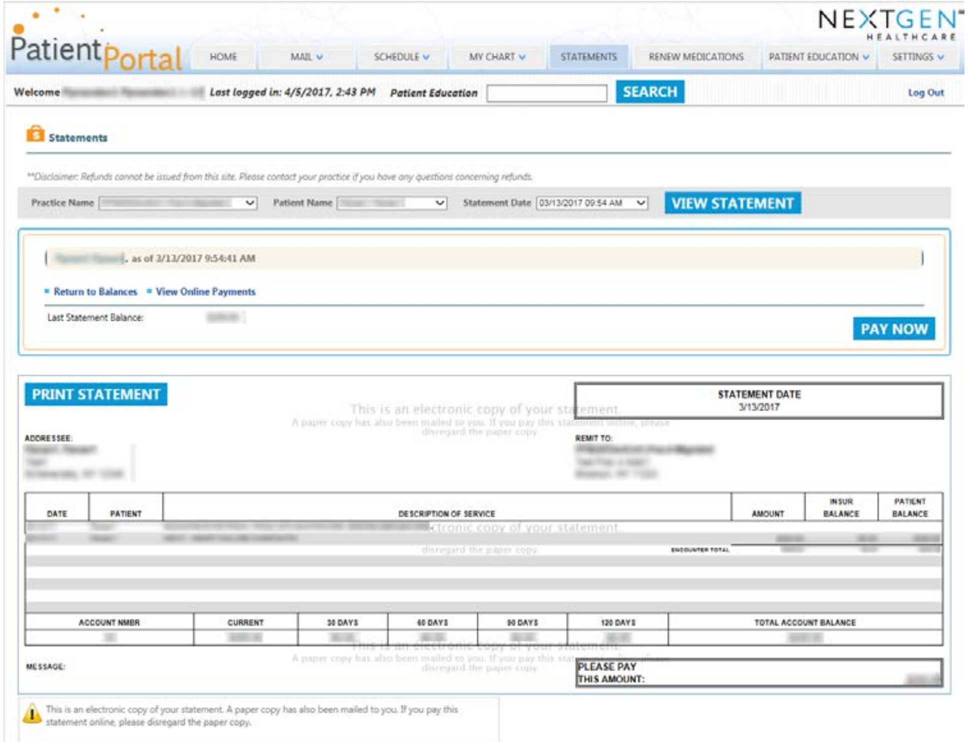
Access Statements from Inbox

You can view statements sent by your practice from your inbox.

1 On the NextGen Patient Portal home page, click **Mail**, and then select **Inbox**.



2 From the Type list, select Statements, and then click a statement communication.



3 From the statements details page, do any of the following:

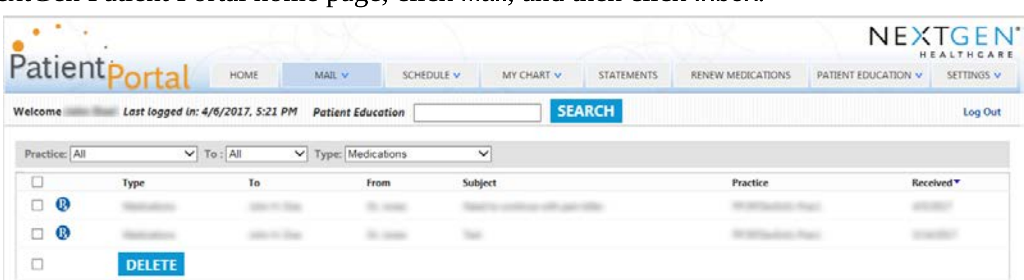
- Click View Statement to view statement.
- Click Pay Now to make a payment.

For more information about statements see the Statements section.

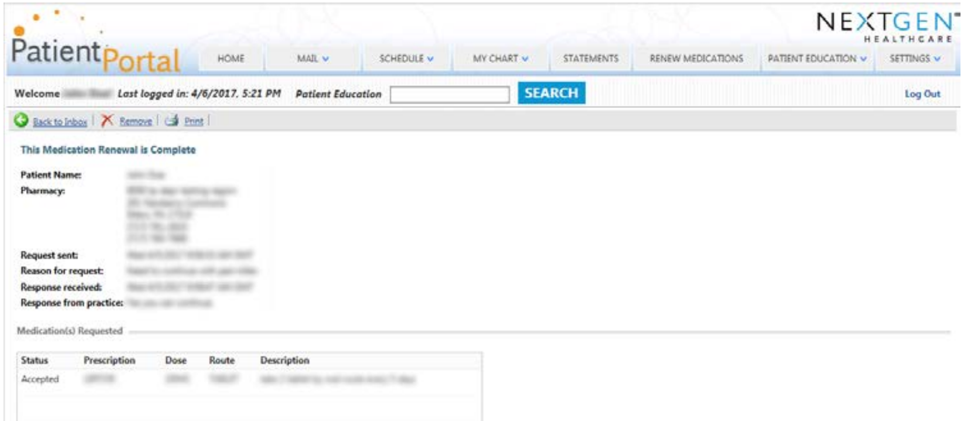
View Medications

You can view your medications sent by the practice from your inbox.

1 On NextGen Patient Portal home page, click Mail, and then click Inbox.



2 From the **Type** list, select **Medications**, and then click a medication communication.

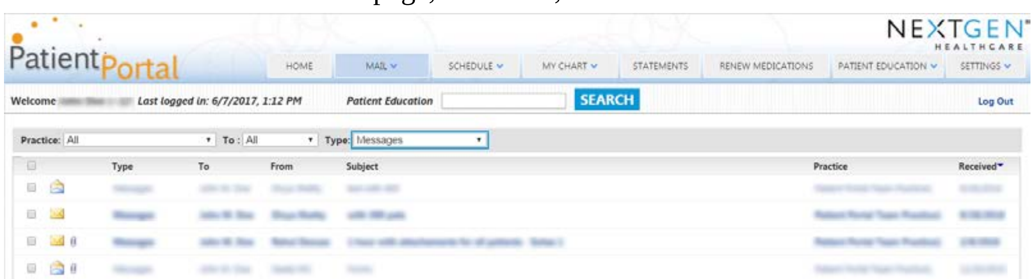


For more information about medication see the Renew Medication (see "Your Medications" on page 69) section.

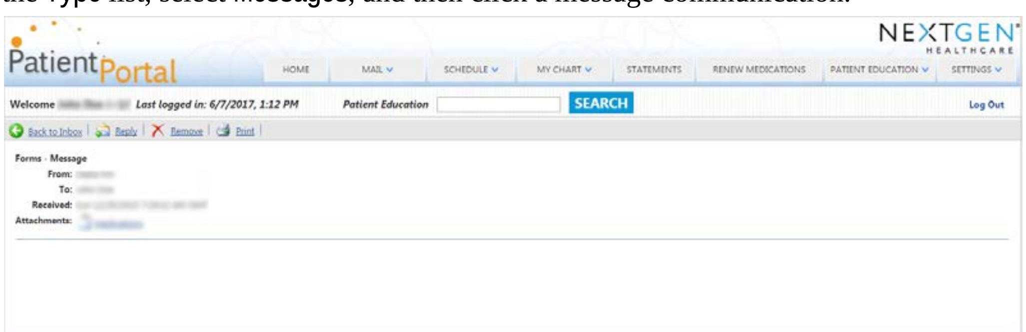
View Messages

You can view your Messages from your practice from your inbox. You can also view your PHR from My Chart.

1 On the NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.



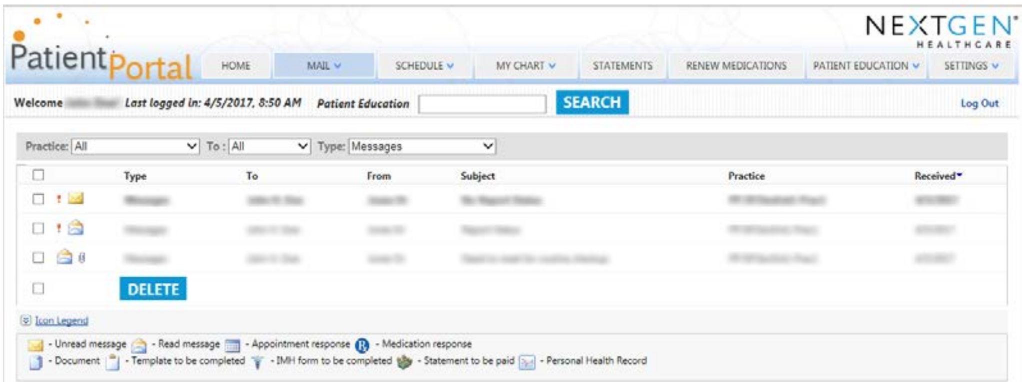
2 From the **Type** list, select **Messages**, and then click a message communication.



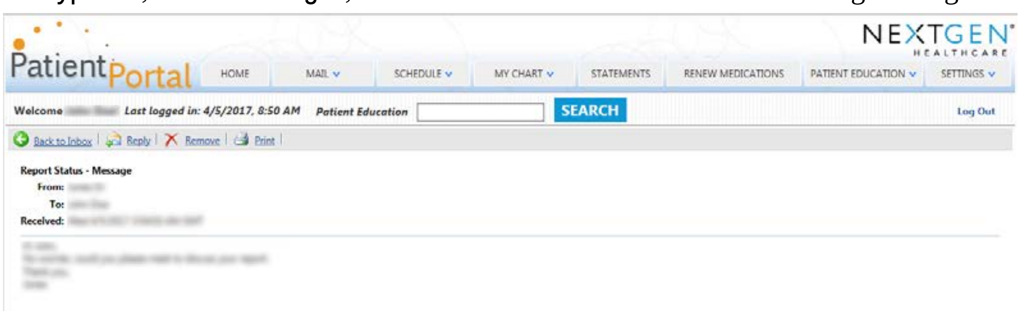
Reply to Messages

You can respond to messages sent by practice based on your practice configurations for patient portal. If the provider has marked the message as do-not-reply, you cannot reply to message

1 On NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.



2 From the **Type** list, select **Messages**, and then click a communication containing message.



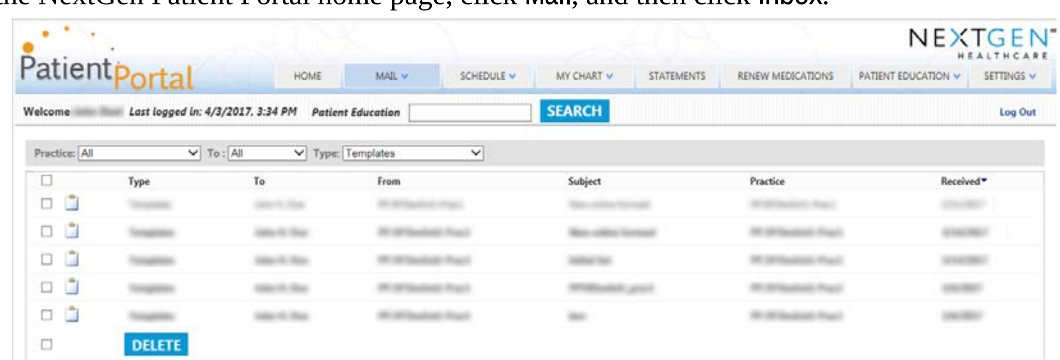
3 From the message details, you can:

- Click **Reply** to reply to a message.
- Click **Remove**, to remove a message
- Click **Print**, to print a message.

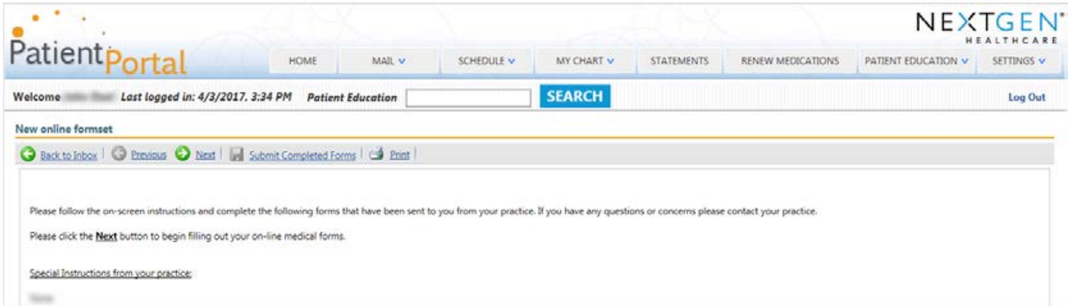
Submit a Form

If your practice has sent you forms, you can complete and submit them online.

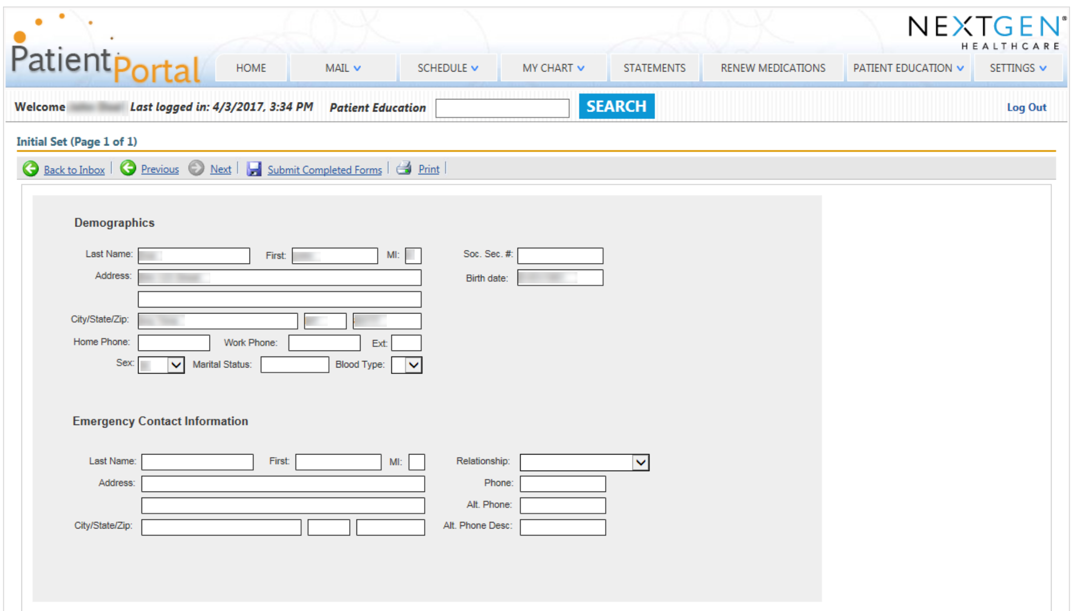
1 On the NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.



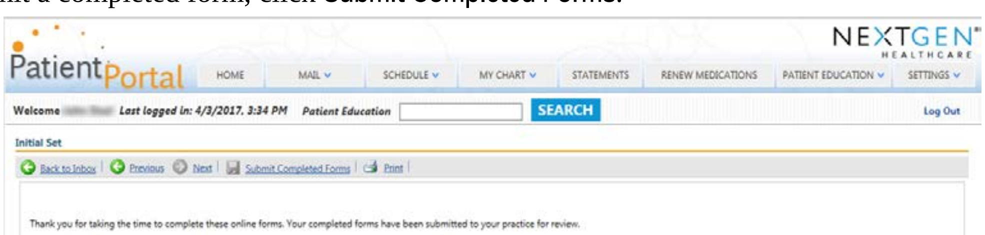
2 From the Type list, select Templates, and then click a communication containing template or templates.



3 Read the instruction, and provide the required information on the template.
Click Next if form contains more than one page.



4 To submit a completed form, click Submit Completed Forms.

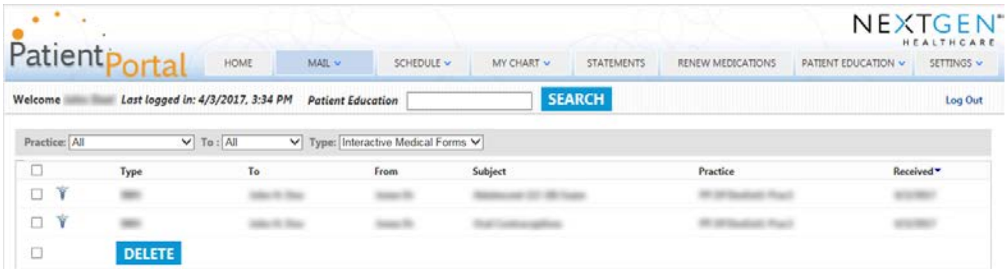


Submit an Interactive Medical Form

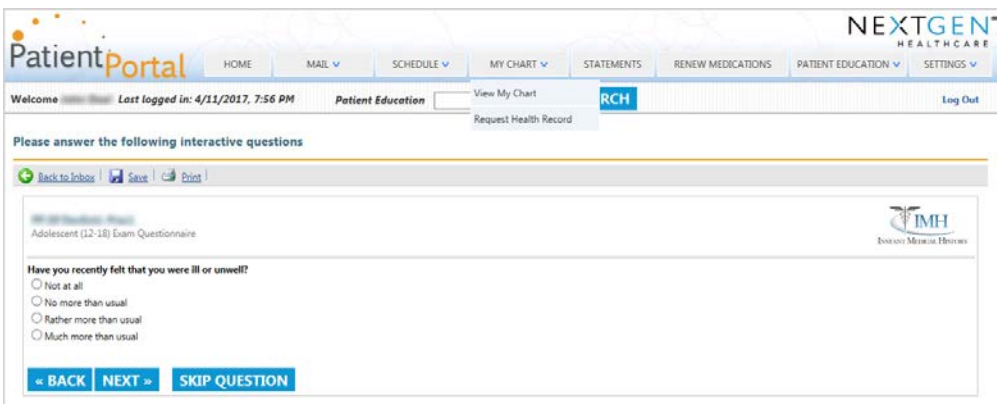
Interactive Medical History forms are questionnaires designed to record medical history and diagnostic information prior to your visit.

If your practice sends you interactive medical forms, you can complete and submit them online.

1 On the NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.

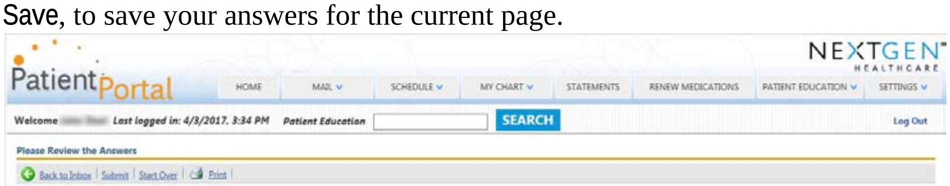


2 From the **Type** list, select **Interactive Medical Form**, and then click communication containing IMH.



3 From interactive medical form, you can:

- Click **Next**, to proceed to the next question. Click **Back**, to return to the previous question. Click **Skip Question**, to skip the question.
- Click **Save**, to save your answers for the current page.



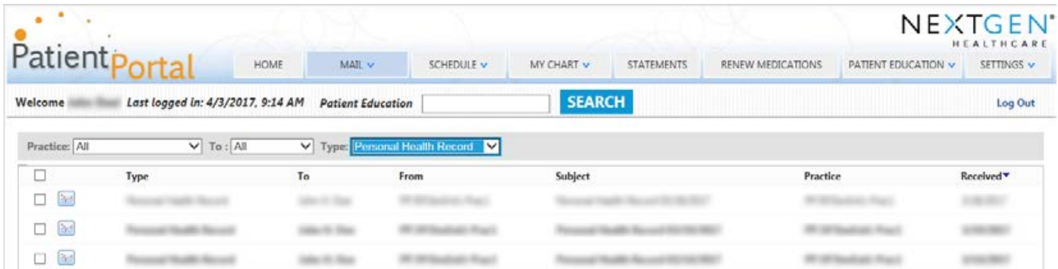
4 Review your information and perform any one of the following:

- Click **Start Over**, to go back and start from the first question.
- Click **Submit**, to send the completed form to the practice.

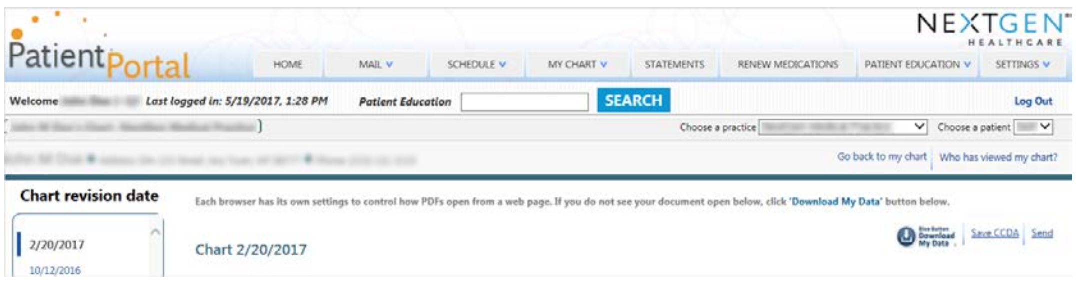
View Personal Health Records (PHR)

You can view your PHR by your practice from your inbox. You can also view your PHR from My Chart.

1 On the NextGen Patient Portal home page, click **Mail**, and then click **Inbox**.



2 From the **Type** list, select **Personal Health Record**, and then click a PHR communication.



Most recent PHR update appears on the top of the message list.

3 From the PHR message page, you can:

- Click **Download My Data**, to download and save the chart.
- Click **Save CCDA**, to save the medical chart in your local drive.
- Click **Send**, to send the chart to another provider.
- Click **Go back to my chart**, to go back to your chart.
- Click **Who has viewed my chart**, to find viewers for your chart.

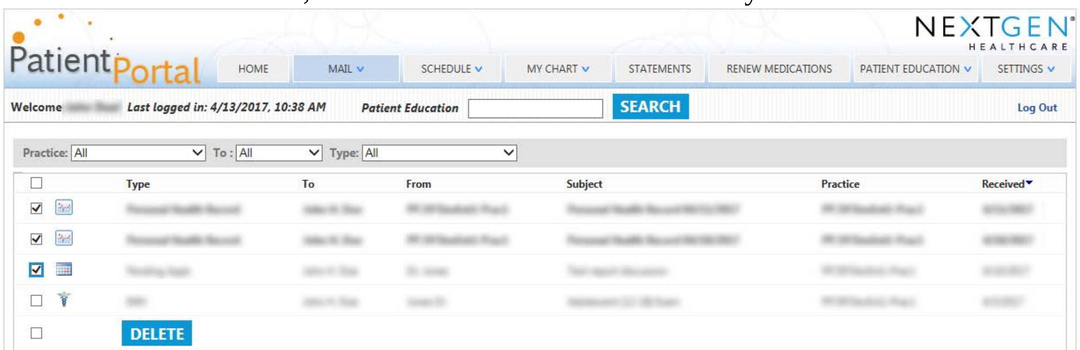
Delete Inbox Items

You can delete inbox items from your inbox.

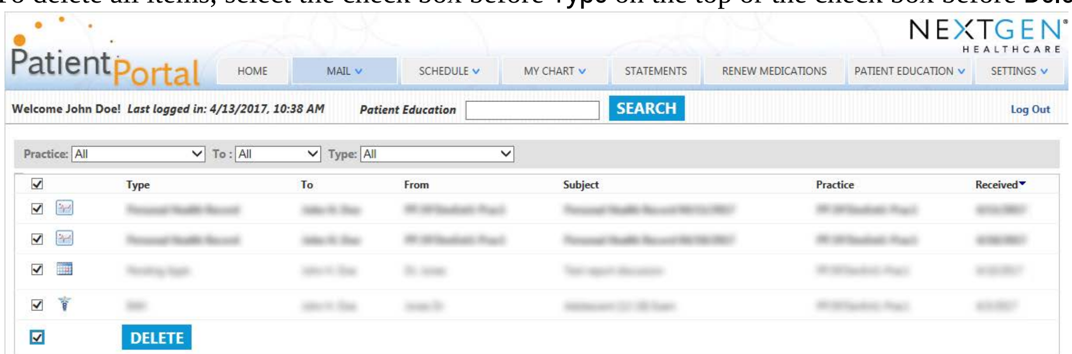
1 On the NextGen Patient Portal home page, click Mail, and then select Inbox.

2 Perform one of the following actions:

- To delete individual items, select the check box next to an item you want to delete.



- To delete all items, select the check box before Type on the top or the check box before Delete.



3 Click Delete and then click OK.

Print Inbox Items

You can print your inbox items after opening them from your inbox. To print PHRs and documents, you must first save them as PDF files and then print them.

1 On the NextGen Patient Portal home page, click Mail, and then click Inbox.

2 Open a message.

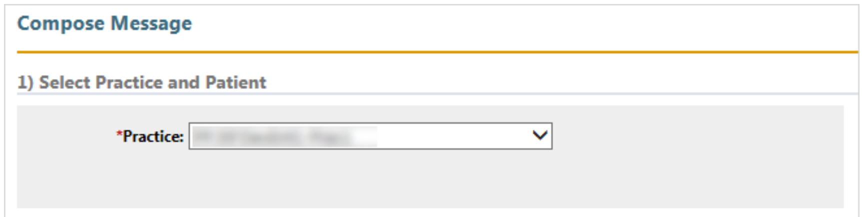
3 Click Print.

4 Select a printer, and then click Print.

Send Messages

You can send messages to your practice.

1 On the NextGen Patient Portal home page, click Mail, and then select Compose Message. Red asterisk indicates the required information.



Note: By default the last selected practice will appear in the Practice field.

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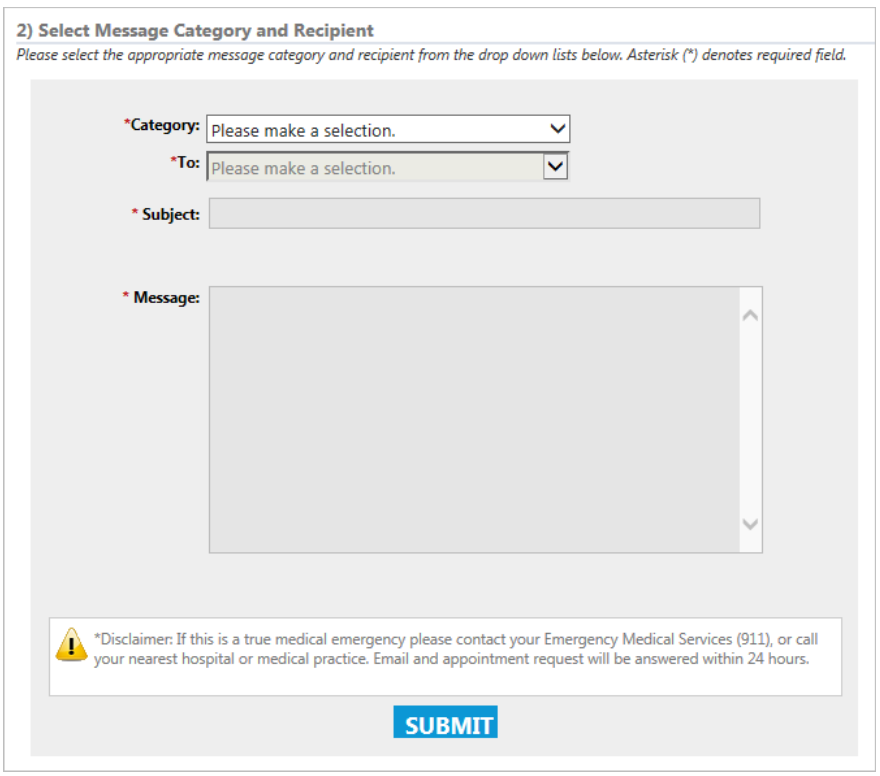
2 Under Select Practice and Patient, from the Practice list select a practice to which you want to send the message if you are enrolled to multiple practice.



3 In the Select Message Category and Recipient section:

a) From the Category list, select the type of message you want to send.

b) From the To list, select the recipient of the message.

c) In Subject, type the subject of the message.

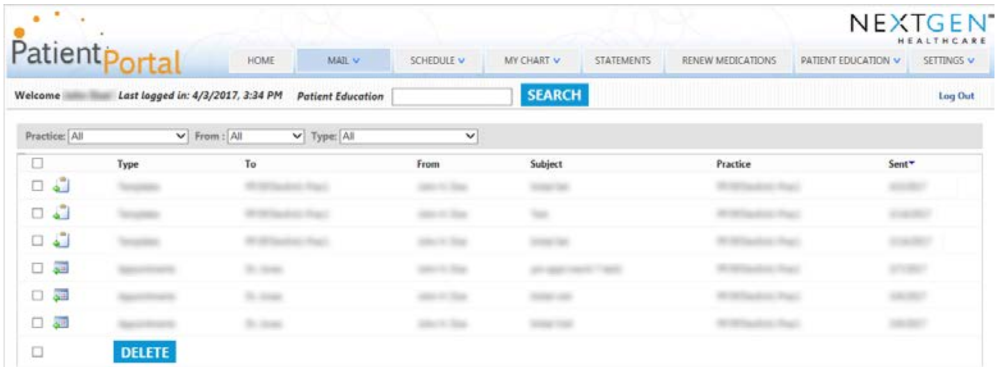
d) in Message, type your message.

4 Click Submit. A confirmation message appears for your sent message.

View Sent Items

You can view all your sent messages.

1 On the NextGen Patient Portal home page, click Mail, and then click Sent Items.



2 From the sent item, you can:

- Filter the messages.
- Sort the messages in ascending or descending order.
- View the messages in the next page or select the page number.
- To open a messages click an item from sent items.

CHAPTER 5

Your Appointments

This section provides information about using the **Schedule** tab to schedule and view appointments.

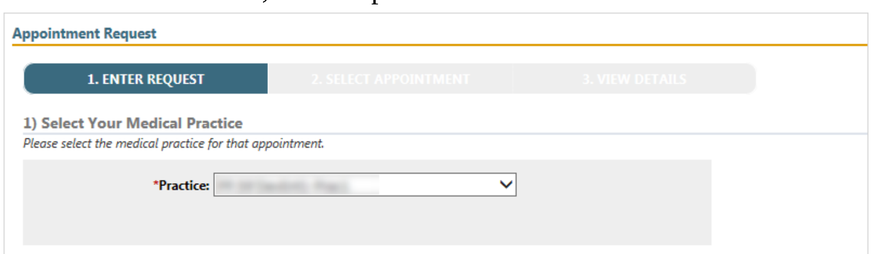
Request Appointments

Depending on how your practice schedules and books appointment requests received from NextGen Patient Portal, you can:

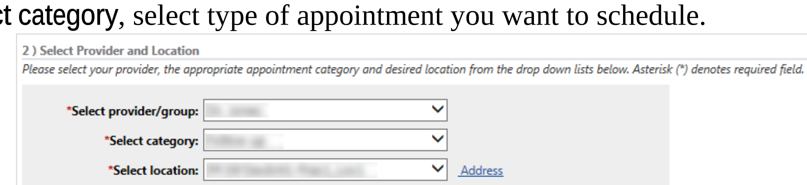
- Submit an appointment request by selecting a preferred date and time and wait for a response from the practice.
- Book an appointment yourself, by searching online for an available appointment schedule date and time.

Create an Appointment Request

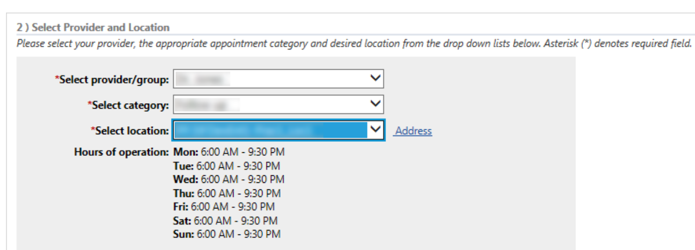
1. On the NextGen Patient Portal home page, click **Schedule**, and then click **Request Appointment.**
2. Under **Select Your Medical Practice**, select a practice.



3. Under **Select Provider and Location**, do the following:
   - From **Select provider/group**, select the provider or group for your appointment.
   - From **Select category**, select type of appointment you want to schedule.

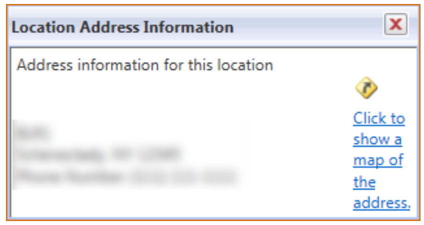


   - From **Select location**, select office or facility location where you want to schedule the appointment.



- To view the address of the selected location, click the **Address** link.

If required, use the **Click to show a map of the address** link to view the location on a map. The map opens in a new window.



4 Submit the request and wait for a response.

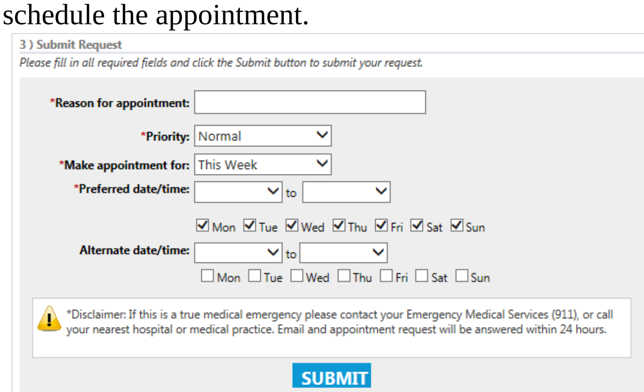
Submit the Request

If you have selected a category that allows you only to submit a request for appointment, you can send a request with your preferred date and time. You must wait for a response from the practice. You must then reply to the response to confirm the appointment or suggest another time.

1 Create an Appointment Request (see "Request Appointments" on page 42).

2 Under **Submit Request**, enter or select the following information:

- Enter the reason for the appointment in **Reason for appointment**.
- From **Priority**, select the level of urgency (Low, Normal or High).
- From **Make appointment for**, select the time frame for your appointment.
- In **Start date** and **End date**, select the start date and end date when you would like to schedule the appointment.
- From **Preferred date/time**, select a time within the hours of operation, and then select a corresponding check box for the day when you would like to schedule the appointment.
- From **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.



3 Click **Submit**. A message indicating that your appointment request has been successfully submitted displays.

When the practice responds to your request, you will receive an email notifying you to log on to your account to review the appointment request response.

4 Open the request response to view if the appointment was booked or is pending.

5 If the suggested time is not suitable, you must either cancel or reschedule the appointment, and then create a new request.

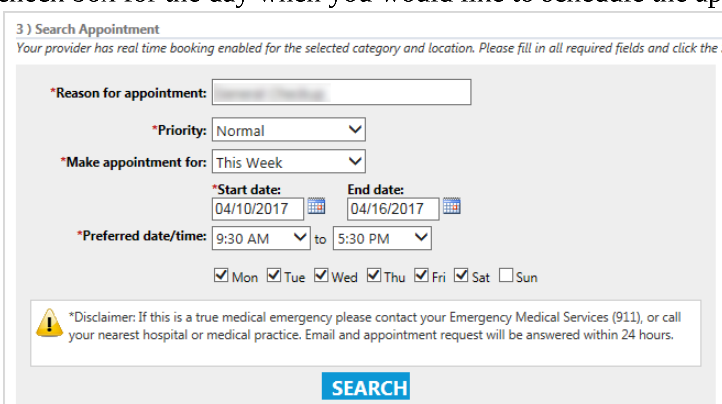
Book an Appointment Online

Based on your practice's portal preferences, you can book an appointment online.

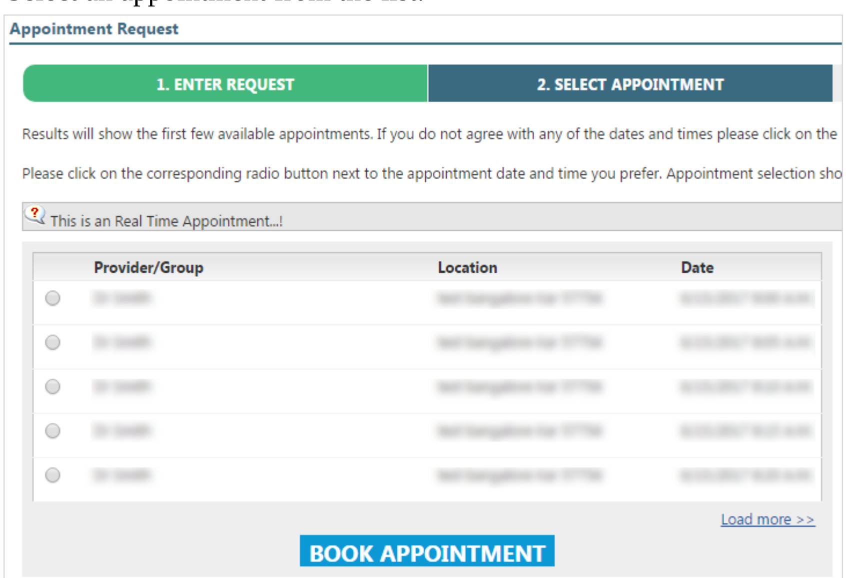
1 Create an Appointment Request.

2 Under Search Appointment, enter or select the following information:

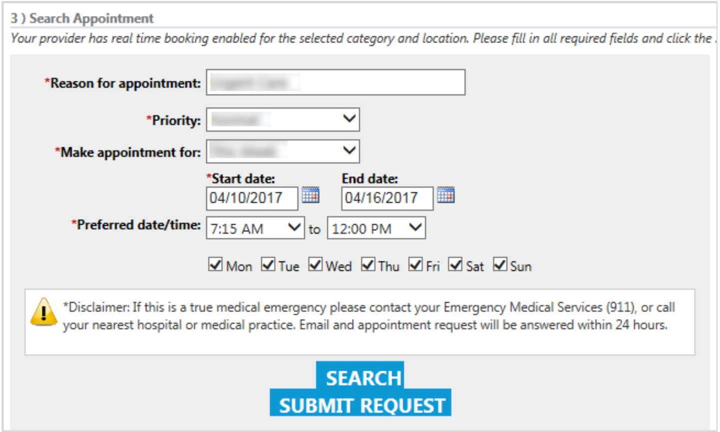
- Enter the reason for the appointment in Reason for appointment.
- From Priority, select the level of urgency.
- From Make appointment for, select the time frame for your appointment, such as next week or next month.
- In Start date and End date, select the start date and end date when you would like to schedule the appointment.
- In Preferred date/time, select a time within the hours of operation, and then select a corresponding check box for the day when you would like to schedule the appointment.



3 Click Search. Select an appointment from the list.

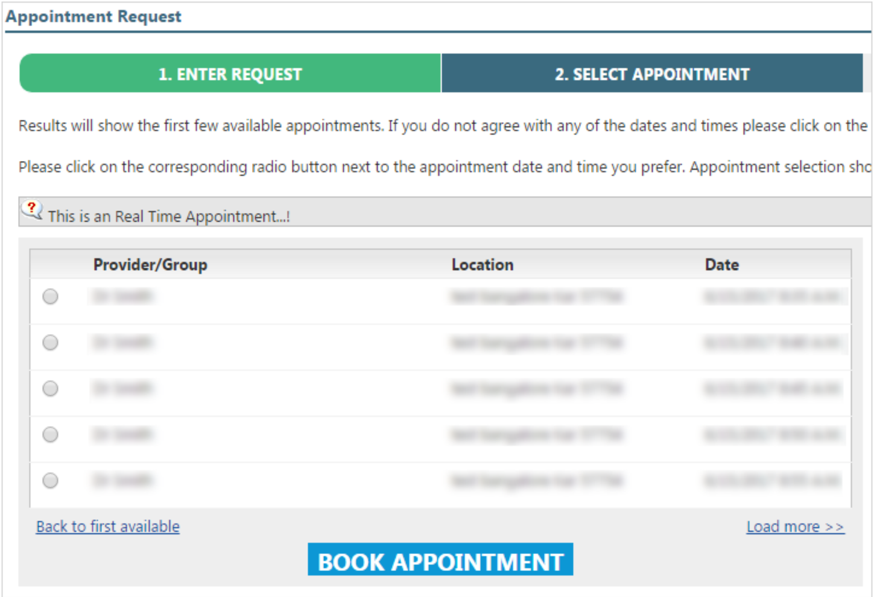


Note: If there are no appointments available for the date and time you selected, either select a different date and time and search again, or click Submit Request to have the practice respond.

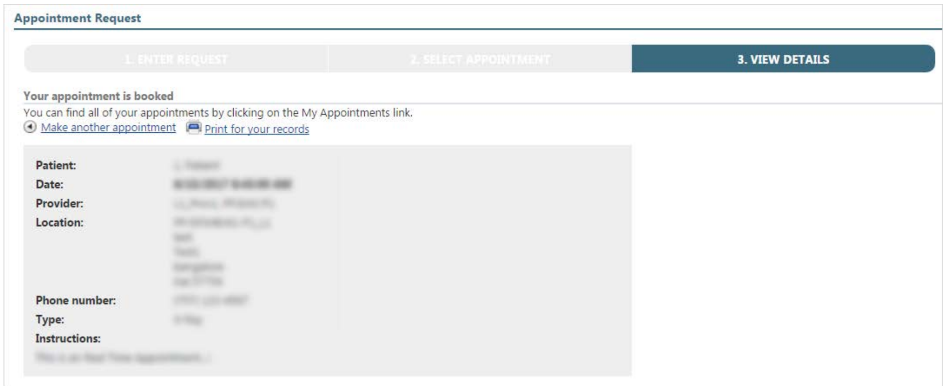


4 To view more available appointments, click Load more. To go back to view more available appointment, click Back to first available.

5 Select an appointment, click Book Appointment.



6 Click Make another appointment, to make another appointment.

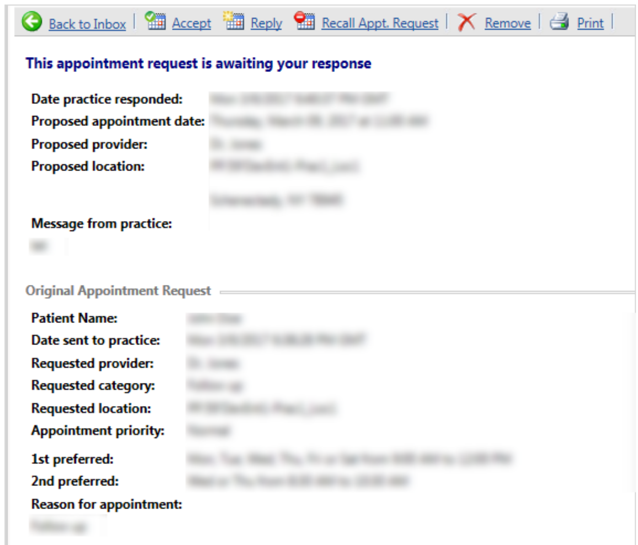


7 Click Print for your records, to take a print of booked appointment.

Accept a Pending Appointment Request

When you send an appointment request, the practice can book the appointment or reply with an available schedule. A pending appointment request appears in your Inbox when the practice replies to your appointment request with a scheduled time. When you receive a pending appointment request from a practice you must accept the request to schedule the appointment.

1 Open the pending appointment from the Inbox.

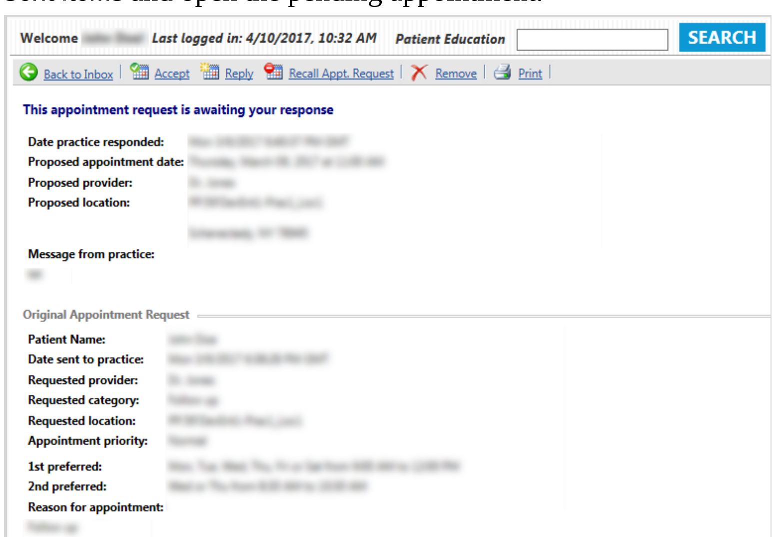


2 Click Accept. A message notifies that your appointment response has been successfully submitted.

Reply to a Pending Appointment Request

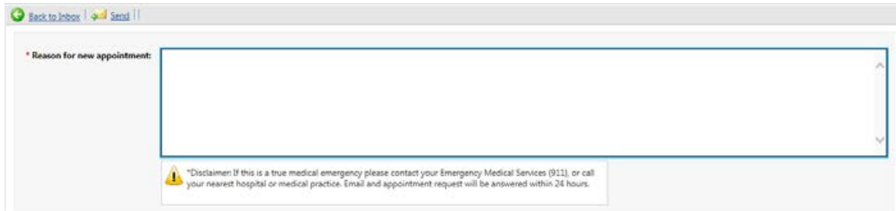
You can send a reply to a pending appointment request if required.

1 From Mail, click Sent Items and open the pending appointment.



2 Click **Reply**.

3 In **Reason for new appointment**, enter the reason to change the appointment.



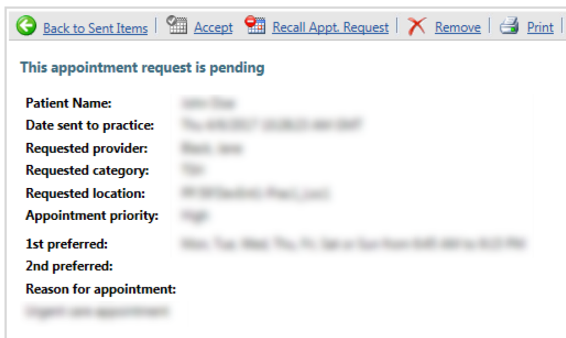
4 Click **Send**. A message notifies that your appointment reply has been successfully submitted.

Cancel an Appointment Request

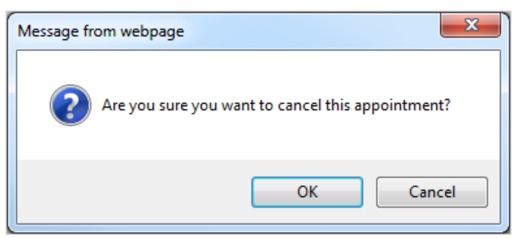
You can cancel a pending appointment request.

1 From **Mail**, click **Sent Items**, and then open a pending appointment.

2 Click **Recall Appt. Request**.



3 Click **OK**.

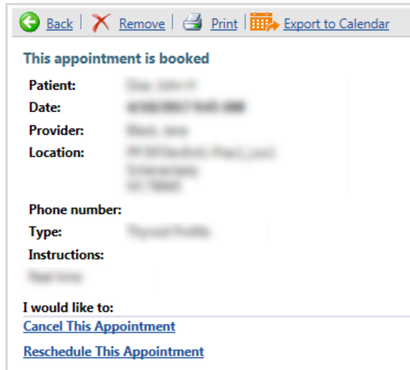


The pending appointment request is canceled.

Reschedule a Booked Appointment

You can reschedule a booked appointment before the appointment date.

1 From Schedule, click My Appointments, and then open a booked appointment.
2 Click Reschedule This Appointment.



3 You can also click Reschedule for the appointment in the Upcoming Appointments section in the Home page dashboard.

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

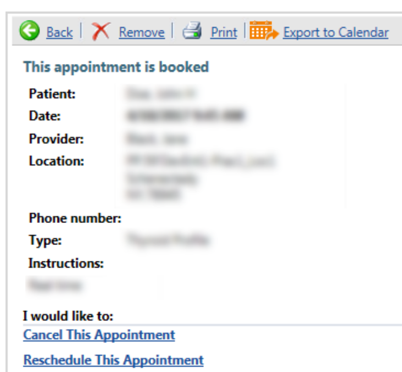
Select a Reason, and then click Submit. The selected appointment's status is set to Cancelled.

4 You can now start a new appointment request.

Cancel a Booked Appointment

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

1 From the Schedule tab, click My Appointments, and then open a booked appointment.
2 Click Cancel This Appointment.



3 From the **Reason** list, select a reason, and then click **Submit**.

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.

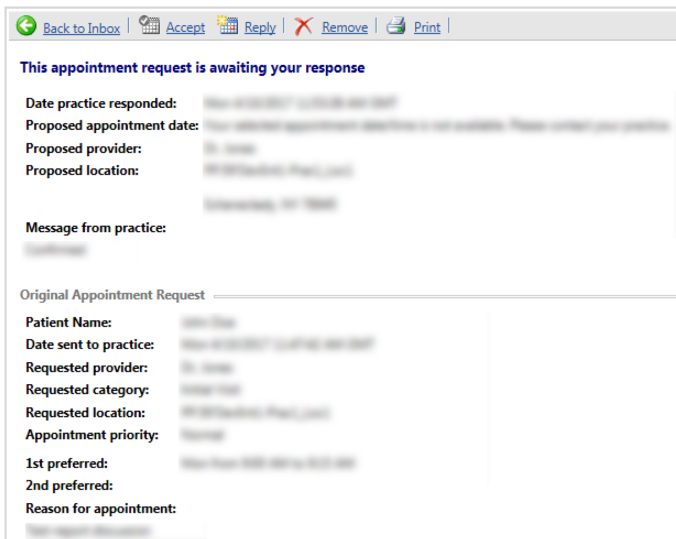
4 The selected appointment's status is set to **Cancelled.** You can also click **Cancel** for the appointment in the **Upcoming Appointments** section in the Home page dashboard.

Delete a Pending Appointment Request

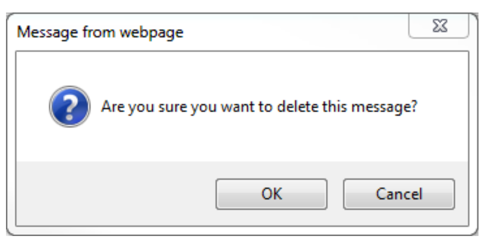
You can remove a pending appointment request that is redundant or elapsed.

1 From **Mail**, click **Inbox**, and then open a pending appointment.

2 Click **Remove**.



3 Click **OK**.



Note: The removal of an appointment is the removal of the item from your Inbox. It does not notify the practice and it therefore is not a cancel, reschedule, or remove off the practice appointment list.

The pending appointment request is removed from the patient account.

Viewing Appointments

The My Appointments page displays a list of all the booked and canceled appointments. You access the My Appointments page from the **Mail** tab or by clicking **Upcoming Appointments** on the Home page. You can open and print, cancel, reschedule, or delete appointments.

Export an Appointment

You can export booked appointments as .ics files and import them into any calendar or scheduling application that supports the .ics format. For example, Apple® Calendar or Microsoft® Outlook®. This helps you view your appointment details on any device that has a calendar application, without opening your NextGen Patient Portal account.

Note: You can export and save only the future appointments in the .ics format.

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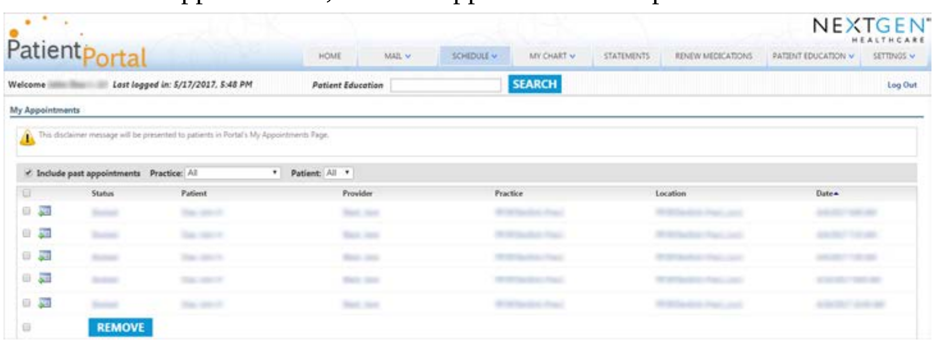
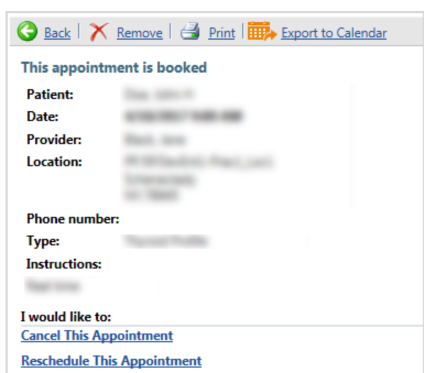
1 From **Schedule**, select **My Appointments.**
2 From the list of booked appointments, click an appointment to export.



3 Click **Export to Calendar.**



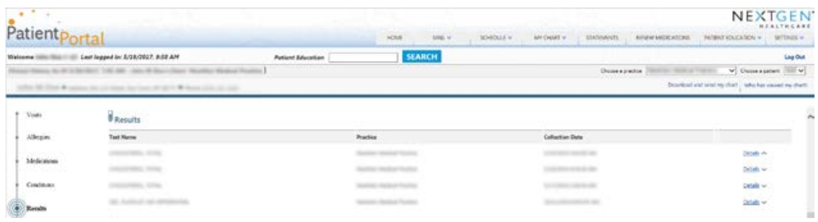
4 The appointment is saved as a .ics file. When prompted, you can open it directly or save it to your device.

CHAPTER 6

Your Personal Health Records

You can view your clinical data or request a PHR that contains your medical history from your practice.

1 On the NextGen Patient Portal home page, click **My Chart**, and then click **View My Chart**.



2 Click a chart item on the left to view the details.

The following table provides a description of the various sections of a patient's chart.

Chart Item	Displays...
Visits	The provider name, encounter type, medications from the latest visits
Allergies	Names of the substances the patient is allergic to, reaction, severity, and status of the known allergies recorded at the practice
Medications	Medication names, instructions, dosage, effective date, status, and comments of the medication prescribed at the practice
Conditions	Names of conditions, effective dates, last related visit, and status of the health condition
Results	Test names, practice name, collection date, and lab results. Click the **Details** link or the row to view the lab result details.
Vitals	The date vital signs were taken, vital signs, and measure results of all vitals recorded at the practice
Immunizations	Immunization names, date, comments, and status of the immunization ordered at the practice
Procedures	The date and name of the procedure performed at the practice
Medical Equipment	The medical description, devices, universal device identifier, and start date for any medical equipment used by practice
Insurance	The name, insurance type, covered party Id, and payer group Id of your health insurance
Social History	The type, description, quantity, and date captured of any social habits
Family History	The names of the family members along with diagnosis, age at onset, and status of family's medical history
Advanced Directives	The advance healthcare directives, results, and effective date recorded at the practice
Instructions	The instructions entered by the providers at the practice

Chart Item	Displays...
Referral Reason	NA
Plan Of Treatment	The date, type, action, and status of the plan of care recorded at the practice
Goals	The date, type, action and status recorded for goals
Demographic Info	Patient name, date of birth (DOB), gender, ethnicity, and preferred language entered at the practice
Functional Status	The functional status recorded at the practice

3 Click **Download and send my chart** to save your chart as a PDF. For more information about downloading and sending your chart details, see the topic, Download My Chart as PDF (see "Download Personal Health Records as PDFs" on page 52).

4 Click **Who has viewed my chart** to view the activity log of a patient chart. For more information about viewing your chart activity log, see the topic Who Viewed My Chart (see "See Who Viewed Your Chart" on page 58).

Save Your Personal Health Records

A Patient Health Record (PHR) is a document that contains information from your chart. It can include allergies, medications, conditions, lab results, vital signs, immunizations, procedures, insurance, social history, family history, advanced directives, instructions, referral reasons, plan of care, demographic info and functional status. You must have Adobe® Acrobat® Reader installed to open and view the file on your computer. You can save and download your PHR as a PDF or C-CDA document.

Download Personal Health Records as PDFs

To view the file, you must have Adobe® Acrobat® Reader installed.

1 From **My Chart**, click **View My Chart**.

2 Click **Download and send my chart**.

3 From **Chart revision date**, select the visit date.

4 Click **Download My Data** 

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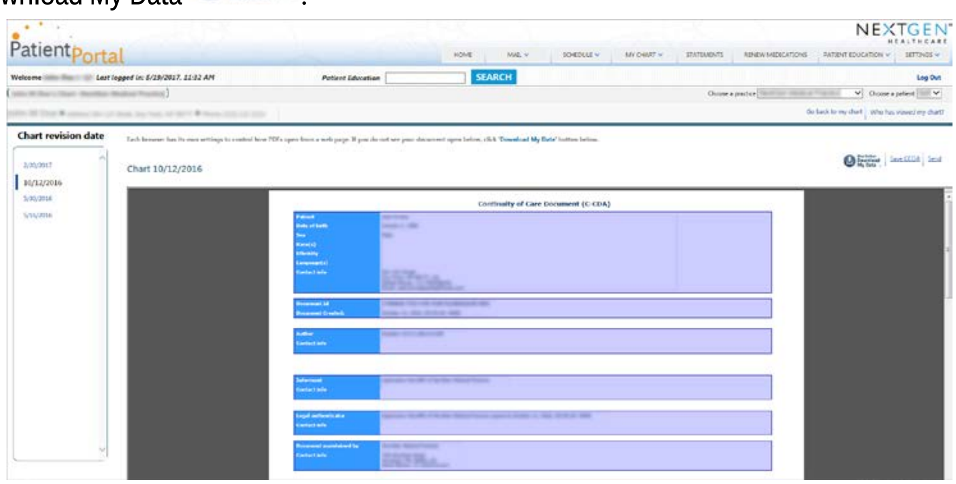


5 Click Save and select a folder location.

6 Click Save.

Download PHRs as C-CDA (XML) Documents

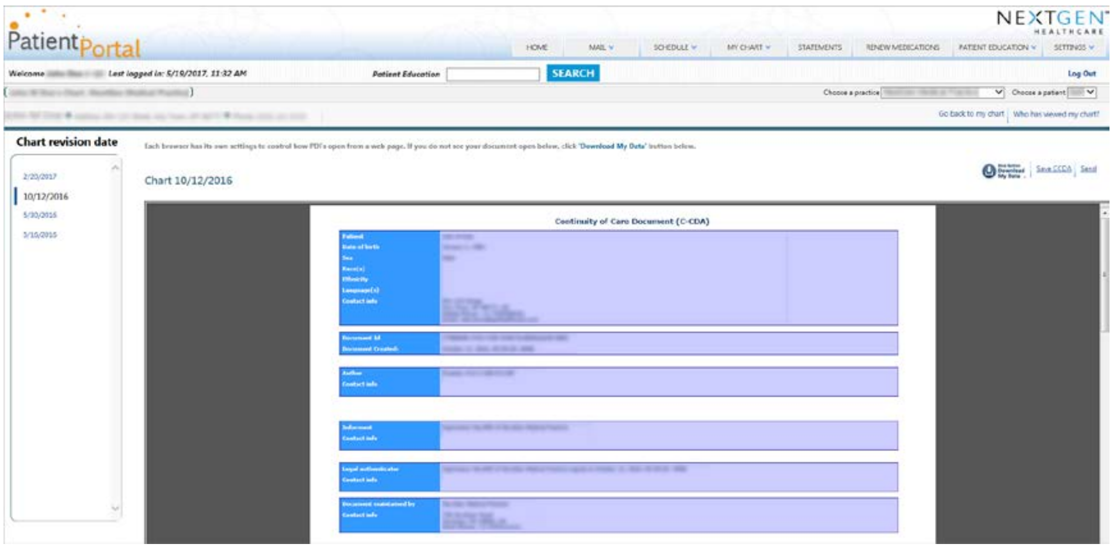
A C-CDA (Consolidated Clinical Document Architecture) document is similar to a PHR, but it uses a healthcare industry standard to organize information and it is formatted in XML. You can take this file to other practices or healthcare entities and they can import the information from this file into their system.

1 From My Chart, click View My Chart.

2 Click Download and send my chart.

3 From Chart revision date, select the visit date.

4 Click Save CCDA.



5 Click Save and select a folder location.

6 Click Save.

Request Your Personal Health Record

You can request a PHR 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.

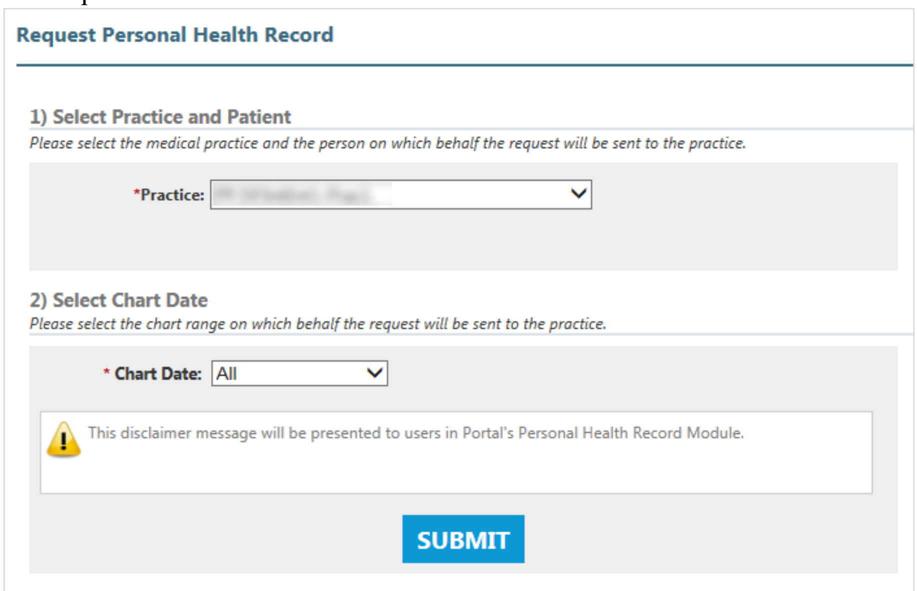
1 From My Chart, click Request Health Record.

> Note: If you are a care manager, the Patient appears in Select Practice and Patient. To request the PHR on behalf of a dependent, select the name of the dependent from the Patient list. To request the PHR for yourself, select Self from the Patient list.

2 If you are enrolled in multiple practices, select the Practice to which the request is to be sent.

3 From **Chart Date**, select the chart date range from the following options:

- **All**: to request full PHR or consolidated PHR.
- **Last 30 Days**: to request PHR for last 30 days.
- **Last 60 Days**: to request PHR for last 60 days.
- **This Year**: to request PHR for current year.
- **Previous Year**: to request PHR for previous year.
- **Custom**: to request PHR between from and to date.



4 Click **Submit**.

A message appears notifying you that your Personal Health Record request has been successfully submitted.

Send Your PHR

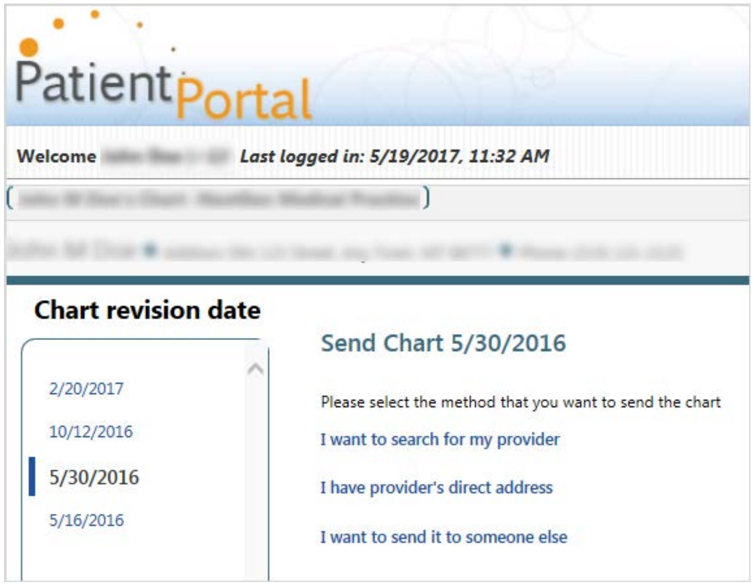
You can send your PHR to any provider or healthcare entity using their DIRECT address (a DIRECT address is not the same as a regular email address). You can contact your provider for the DIRECT address or perform a search to obtain it. You can:

- Search for a provider and send the PHR.
- Send your PHR to a provider using the DIRECT address
- Send the PHR to a third-party using their email address.

Search for a Provider and Send Your PHR to the Provider

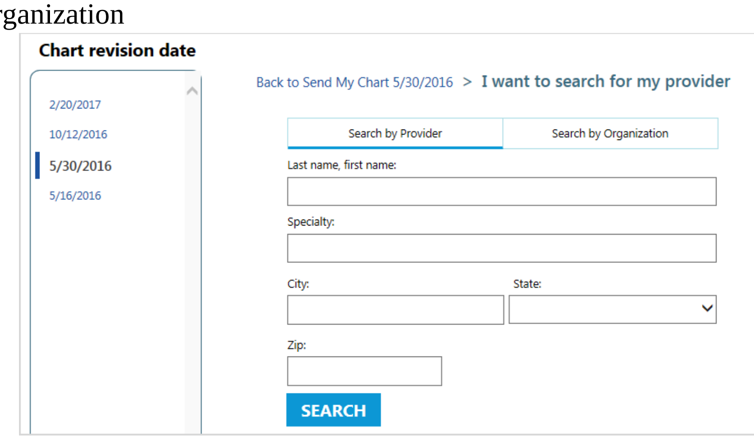
You can search for the provider and send the PHR.

1 From Send Chart, click I want to search for my provider.

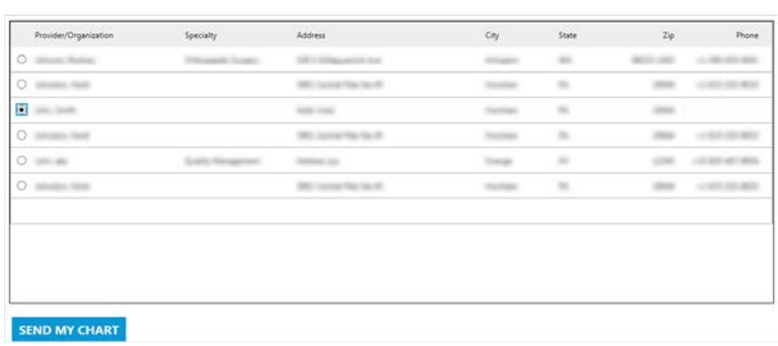


2 Search for your provider in any of the following ways:

- Search by Provider
- Search by Organization



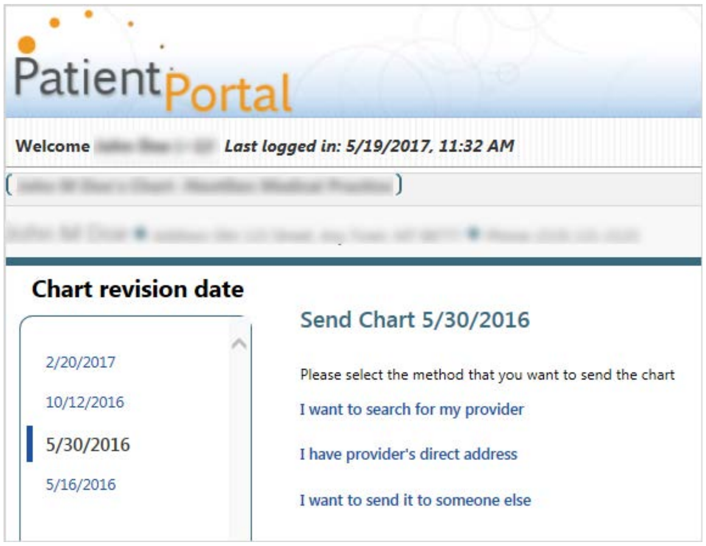
3 From the search results, select the provider to whom you want to send the PHR, and then click Send My Chart.



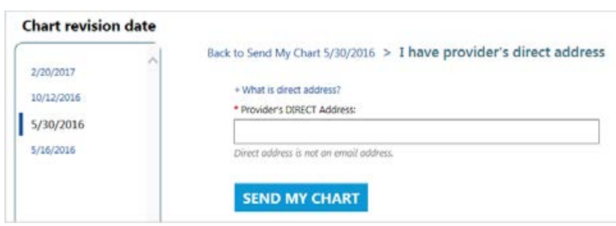
Send Your PHR to a DIRECT Address

Ensure that you have the DIRECT address of the provider.

1. From **My Chart**, click **View My Chart.**
2. Click **Download and send my chart.**
3. From **Chart revision date**, select the date.
4. Click **Send.**
5. Click **I have provider's direct address.**

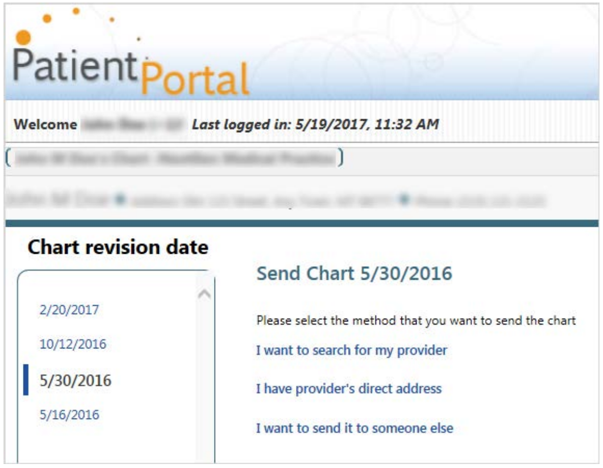


6. In **Provider's DIRECT Address**, enter the provider's DIRECT address, and then click **Send My Chart.**



Send Your PHR Using an e-mail Address

1 From Send Chart, click I want to send it to someone else.

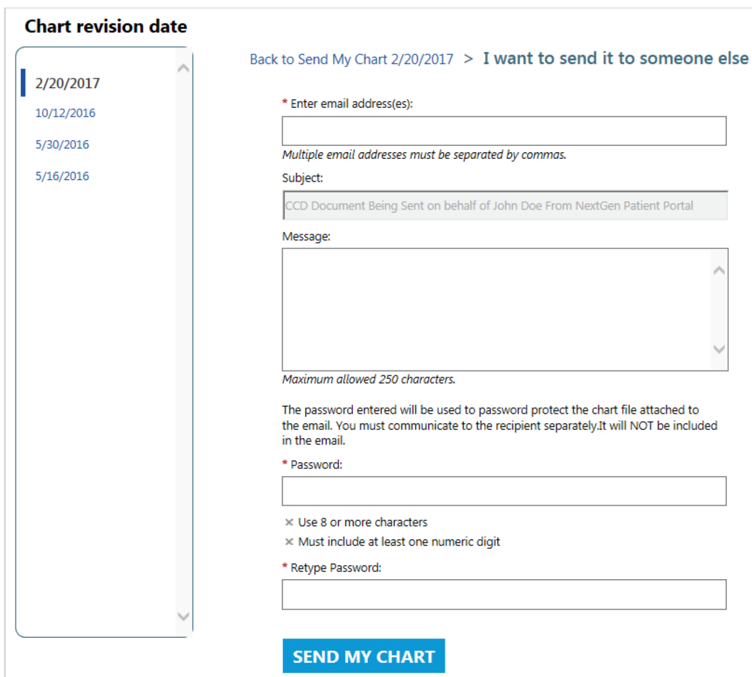


2 Type the following details:

a) Recipient's e-mail addresses.

b) Your message.

c) Your password and re-type your password.



3 Click Send My Chart.

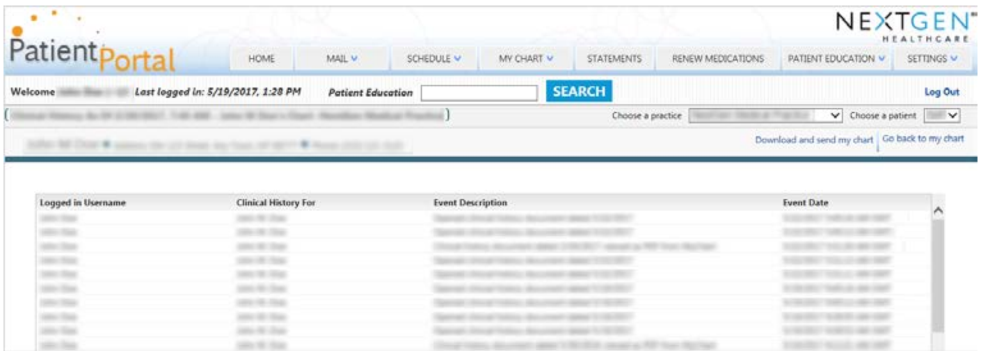
A message appears notifying that your request has been successfully submitted.

See Who Viewed Your Chart

You can view activity log such as logged in username, clinical history for, event description, and event date for your NextGen Patient Portal account.

1 From My Chart, click View My Chart.

2 Click Who has viewed my chart.



CHAPTER 7

Your Statements

You can view your statements or make payments against the statements from the Statements tab.

View Statements

You can opt to receive electronic statements that can be accessed from the NextGen Patient Portal.

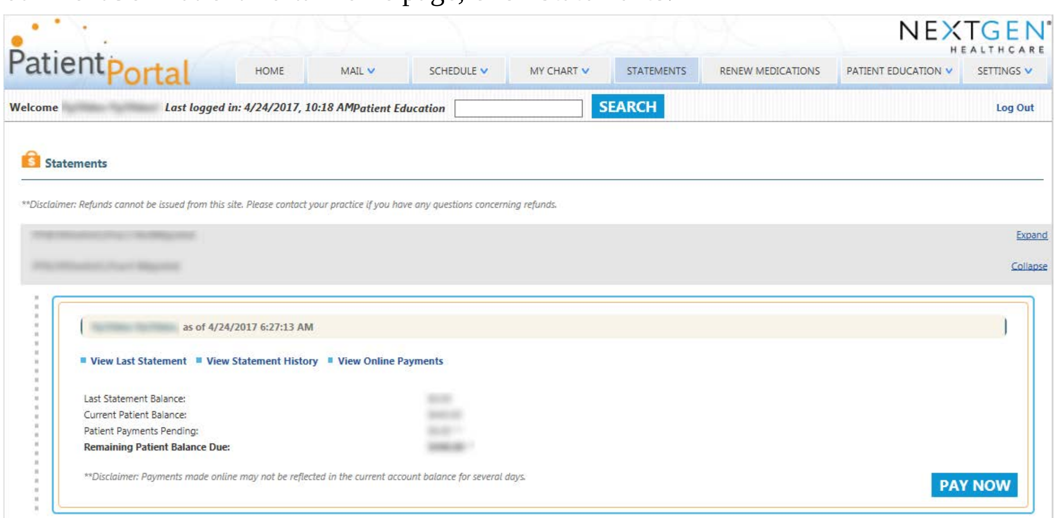
The Statements page displays your or your dependent balances, if any.

Also, you can view the following details:

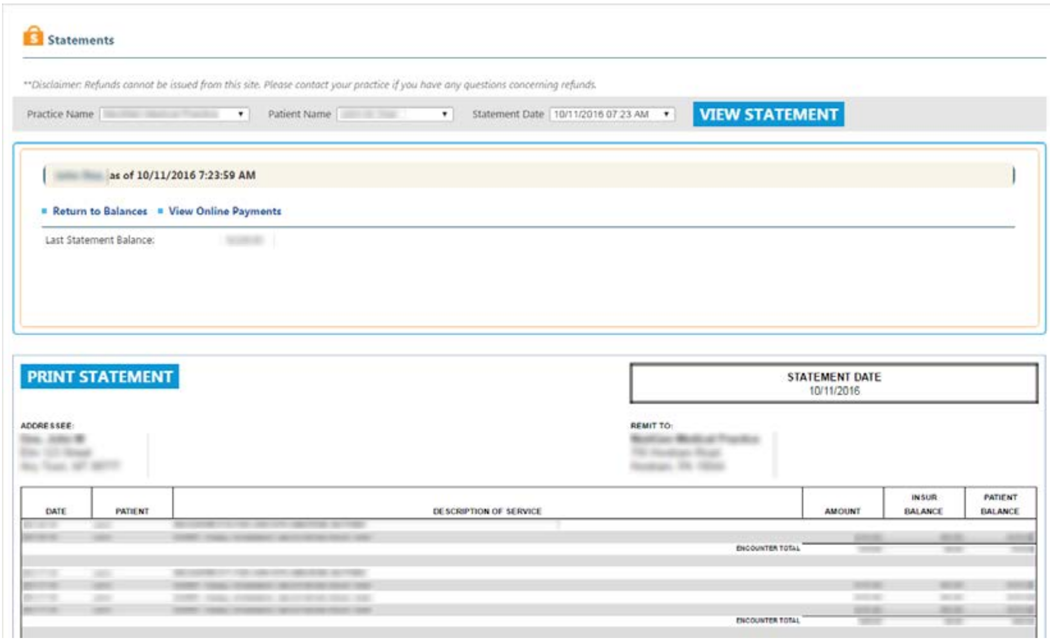
- Last statement: Your last statements.
- Statement history: Your statement history.
- Online payments: You can view online payment details and you can make online payment from the statement home page, the account balance page, or the view statement page.
- Real time account balance: If your practice has opted, real-time account balance allows you to receive your updated statement whenever you make a payment. This allows you to make multiple partial payments, if required.

View your Last Statement

1 On your NextGen Patient Portal home page, click **Statements**.



2 Click **View Last Statement**.



3 To view your statement history based on filters, select from the following options:

- If you are enrolled to more than one practice, select the relevant practice.
- If you are a care manager, select the patient name.
- If you want to view statement for a specific date, select the date.

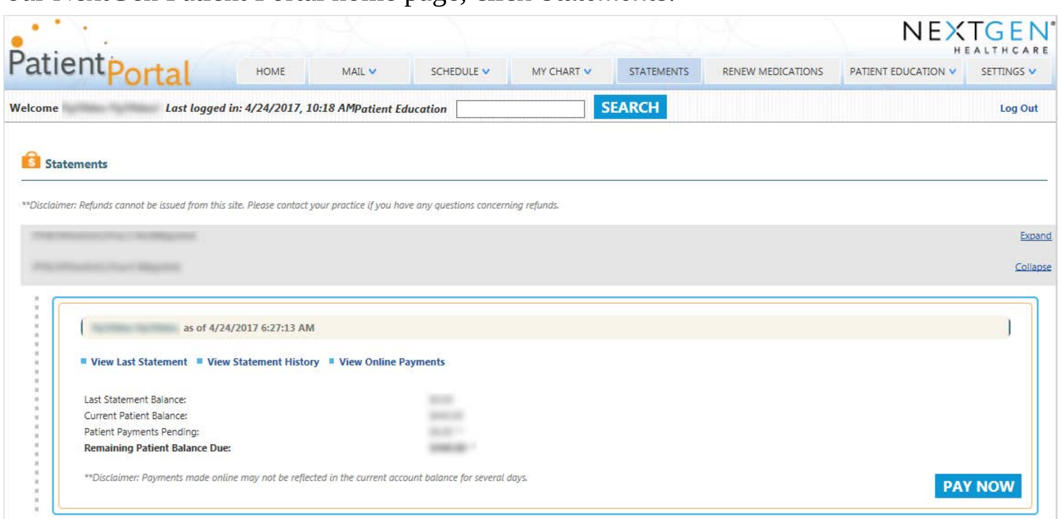
4 Click **View Statement**.

5 To return to statement page, click the **Return to Balances** link.

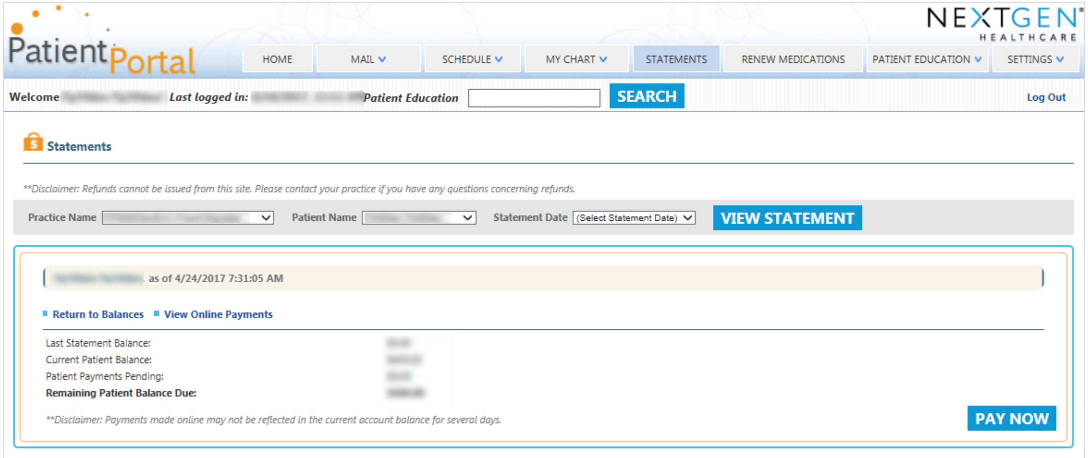
6 To print the statement, click **Print Statement**.

View your Statement History

1 On your NextGen Patient Portal home page, click **Statements**.



2 Click **View Statement History**.



3 To view your statement history based on filters, select from the following options:

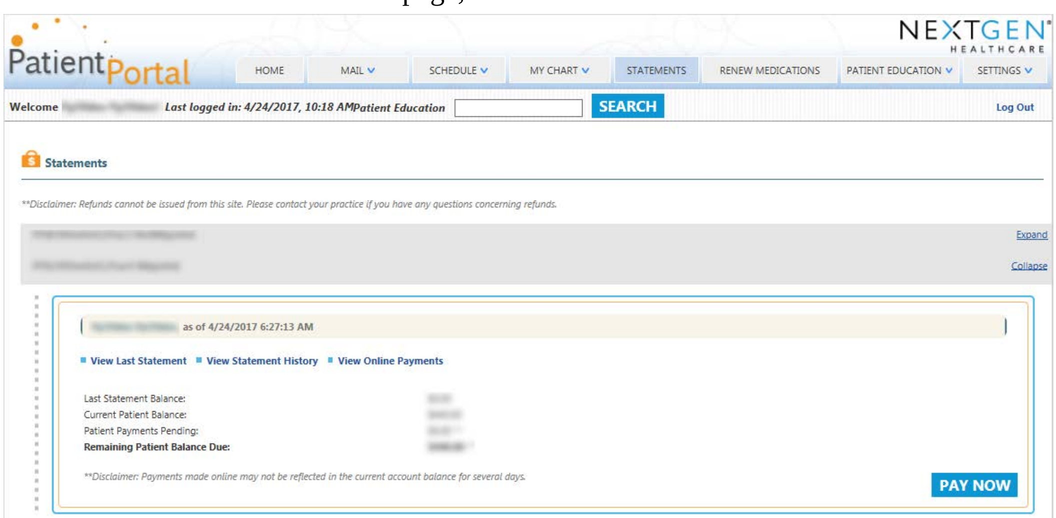
- If you are enrolled to more than one practice, select the relevant practice.
- If you are a care manager and you are managing the dependent account, select the relevant patient.
- If you want to view statement for a specific date, select the date.

4 Click **View Statement**.

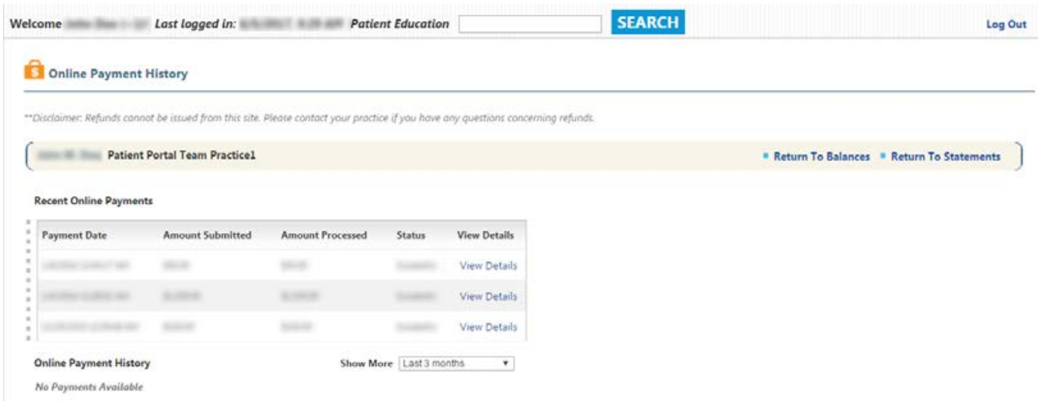
5 To return to statement page, click **Return to Balances**.

View your Online Payments

1 On your NextGen Patient Portal home page, click **Statement**.



2 Click **View Online Payments.**



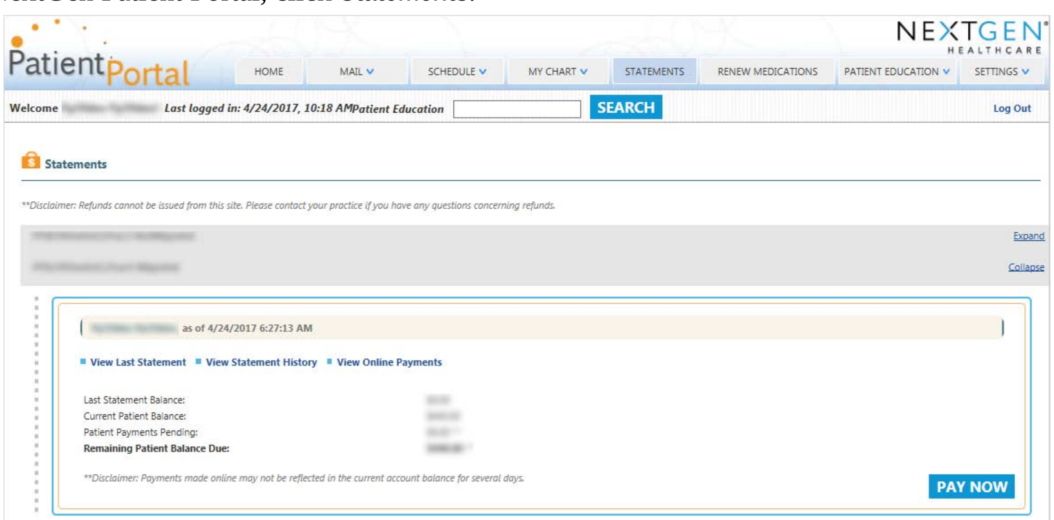
3 From the online details, view the following information:

- Payment Date: date and time the payment was made
- Amount Submitted: amount of submitted payment
- Amount Processed: amount that was processed by the credit card vendor
- Status: status of the payment
- View Details: payment receipt details

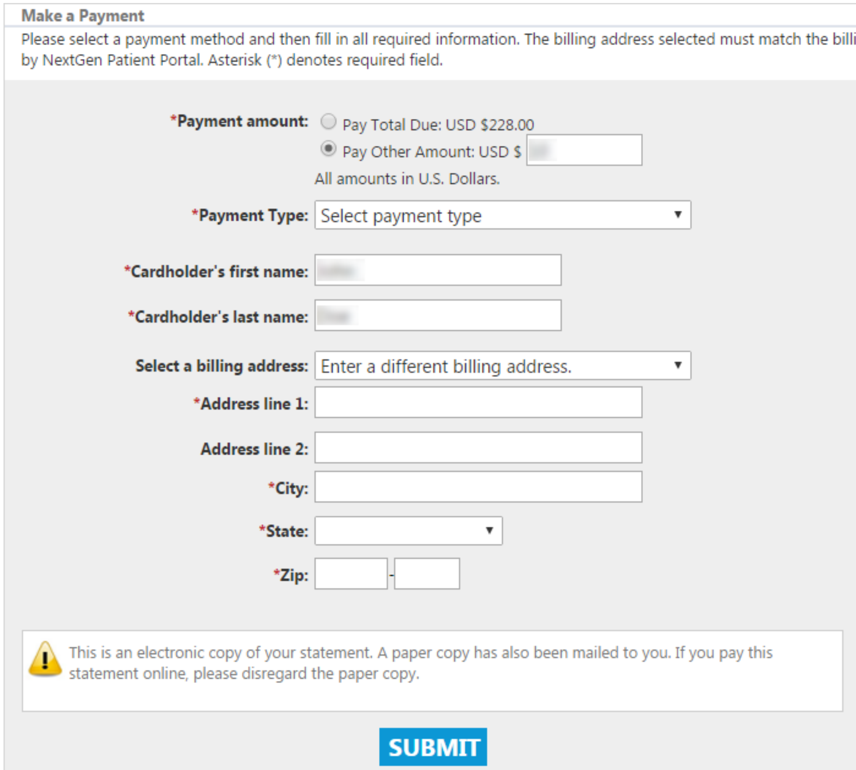
Make Payments

If your practice has enabled the online payment feature, you can make payments through the NextGen Patient Portal for the statements you receive. Refunds are not issued on the portal. Contact your practice for any refund related queries.

1 On NextGen Patient Portal, click **Statements.**



2 Click **Pay Now**.



Note: Based on your practice configuration, you can make payment using InstaMed or TransFirst payment gateway.

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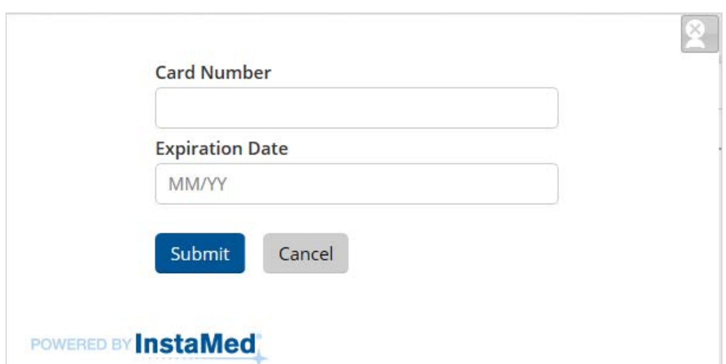
3 From **Payment amount**, select one from the following:

- To pay your total due, click **Pay Total Due**.
- To pay partial amount, click **Pay Other Amount** and enter the amount.

4 From **Payment Type**, select the preferred payment method, and then perform any of the followings:

- If you have selected **Visa**, **MasterCard**, **Amex**, or **Discover**, enter the following information:
  - Credit Card Number
  - Expiration Date



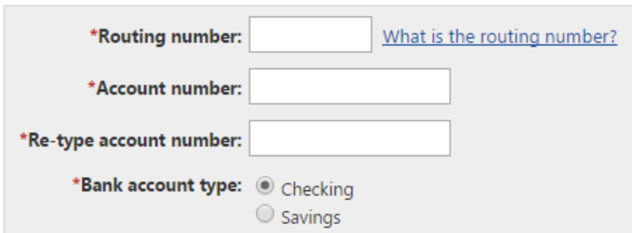
  - Click **Submit**.

- If you have selected **eCheck Payments**, type the following information:
  - Routing number

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.

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

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



5. In **Cardholder's first name**, type the card-holder first name.
6. In **Cardholder's last name**, type the card-holder last name.

   By default, the system displays the logged in user’s first and last name in the Cardholder’s name fields.
7. Type your billing address details in **Select a billing address** with the following details:
   a) Address lines
   b) City
   c) State
   d) Zip
8. 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.

9. Click **Print this receipt**.

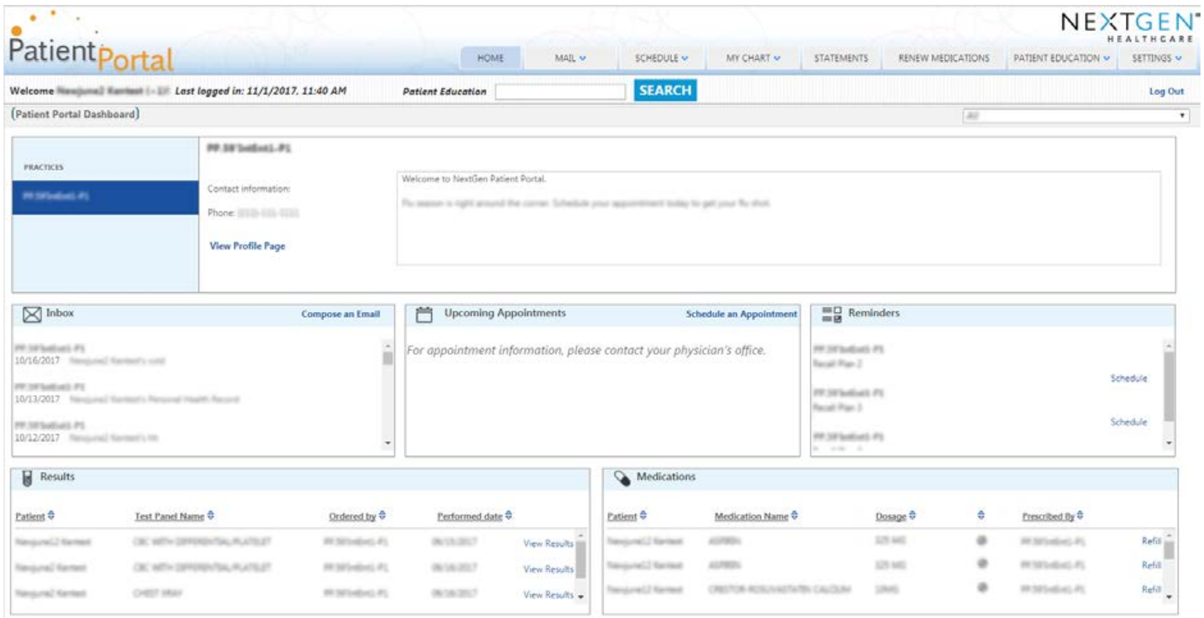
CHAPTER 8

Your Lab Results

You can view your lab and radiology results from the NextGen Patient Portal.

Viewing Lab Results on the Home Page

You can view your results from the **Results** section on the home page.



Sorting Lab Results in the Results Section

You can sort your lab results in ascending or descending order by clicking a column header in the **Results** section. Additionally, you can also click the arrow next to each column header to sort the information in the section.

Icon	Description
⇕	This is the default icon for each column header. When you click this icon, the information is sorted in ascending order.
▲	This icon indicates that the information is sorted in ascending order. When you click this icon, the information is sorted in descending order.
▼	This icon indicates that the information is sorted in descending order. When you click this icon, the information is sorted in ascending order.

Lab Results Not Available Within My Chart

The Lab Results section on the Home page appears differently if aggregation of PHRs fails for a patient. A new section called Results: Not Available Within My Chart appears, providing a direct link (View Document) to the PHR document that contains the selected lab results.

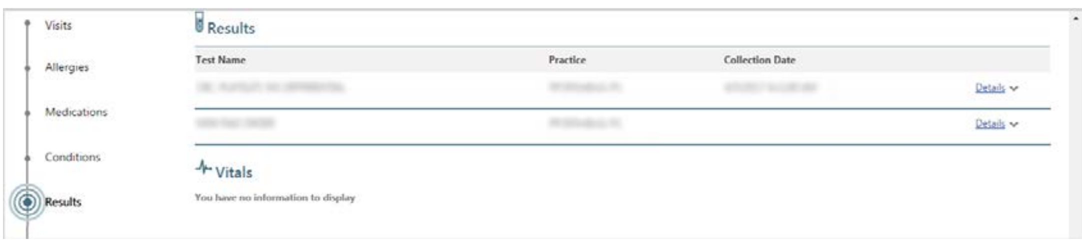
The following information appears in Results: Not Available Within My Chart:

- Patient Name
- Name of the practice that ordered the tests
- Date the patient received the result on the portal

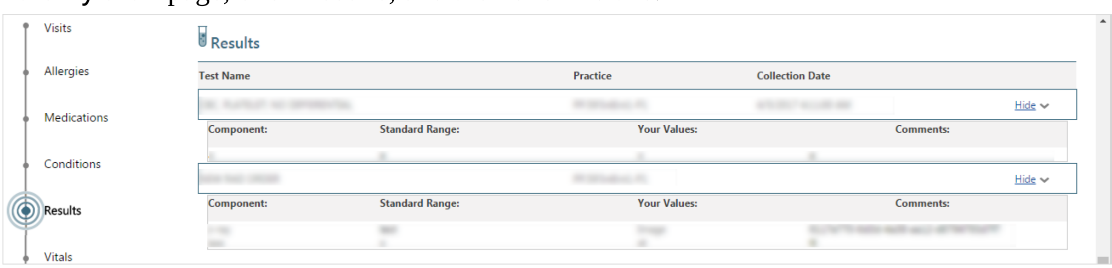
View Lab Results Details from My Chart

The My Chart page provides the consolidated information from all PHRs. The Results section on the My Chart page provides all consolidated lab results.

1 On the NextGen Patient Portal home page, click My Chart, and then click View My Chart.



2 On the My chart page, click Results, and then click Details.

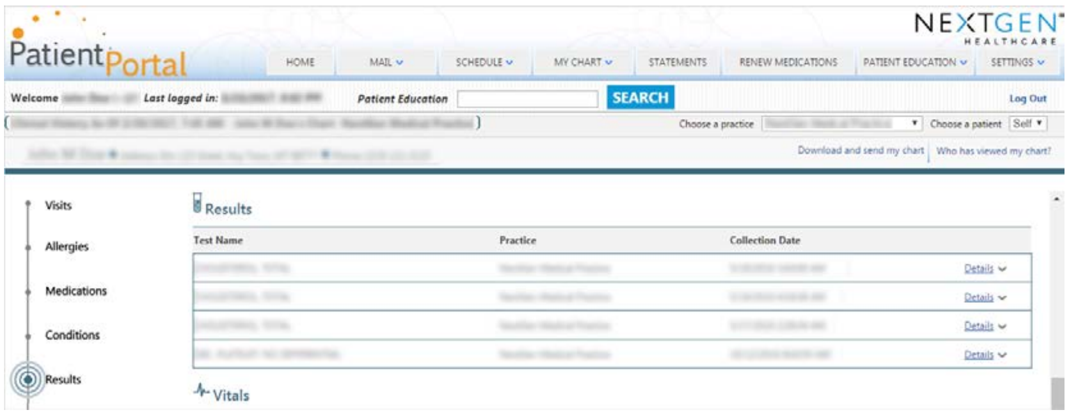


You can view your consolidated lab results details.

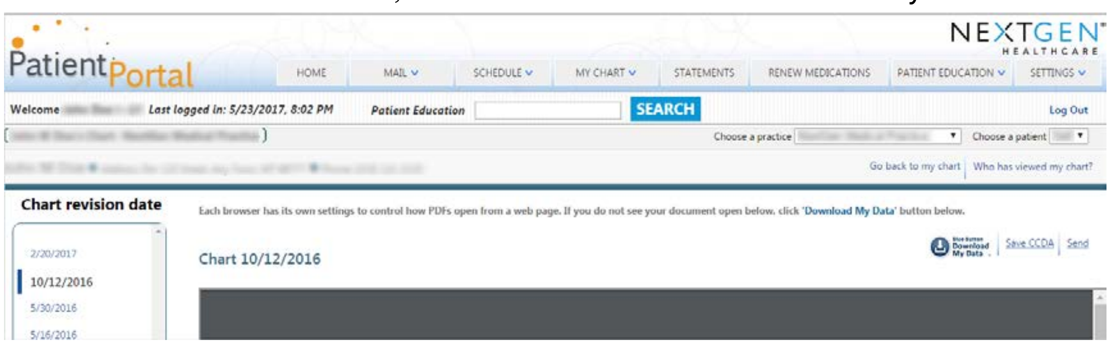
View Lab Results

You can open a PHR in the Download and Send My PHR page, and then view the results in PDF.

1. On the NextGen Patient Portal home page, click **My Chart**, and then click **View My Chart**.
2. On the **My chart** page, click **Download and send my chart**.



3. Select chart revision date on the left, and then click the **Blue Button Download My Data**.

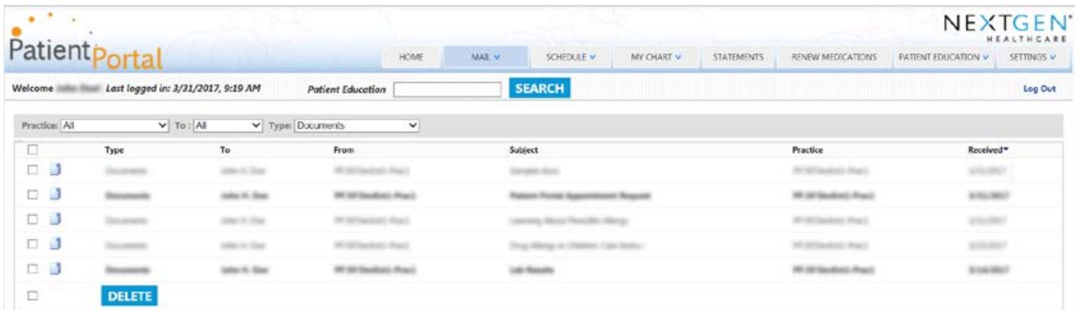


4. Click **Save** and select a location.
5. Click **Save**. Open the saved file and view the result in PDF.

View Radiology Results

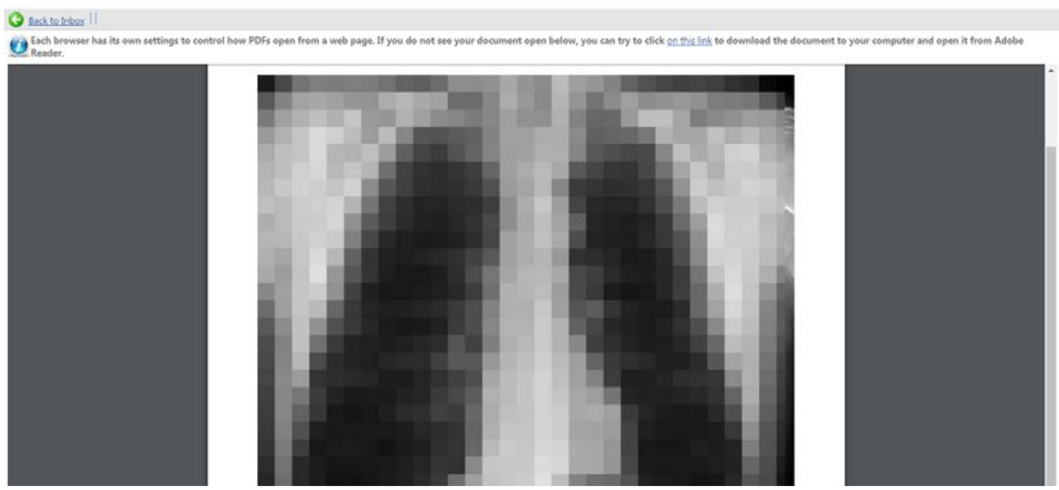
You can view your Radiology results from the from the Lab results section on the My Chart page. If the practice has sent you images pertaining to your radiology results, you can view these images in the Inbox as a document.

1 On the NextGen Patient Portal home page, click **Mail** tab, and then click **Inbox**.



2 From the **Type** list, select **Documents**.

3 Click the message to view the radiology image.



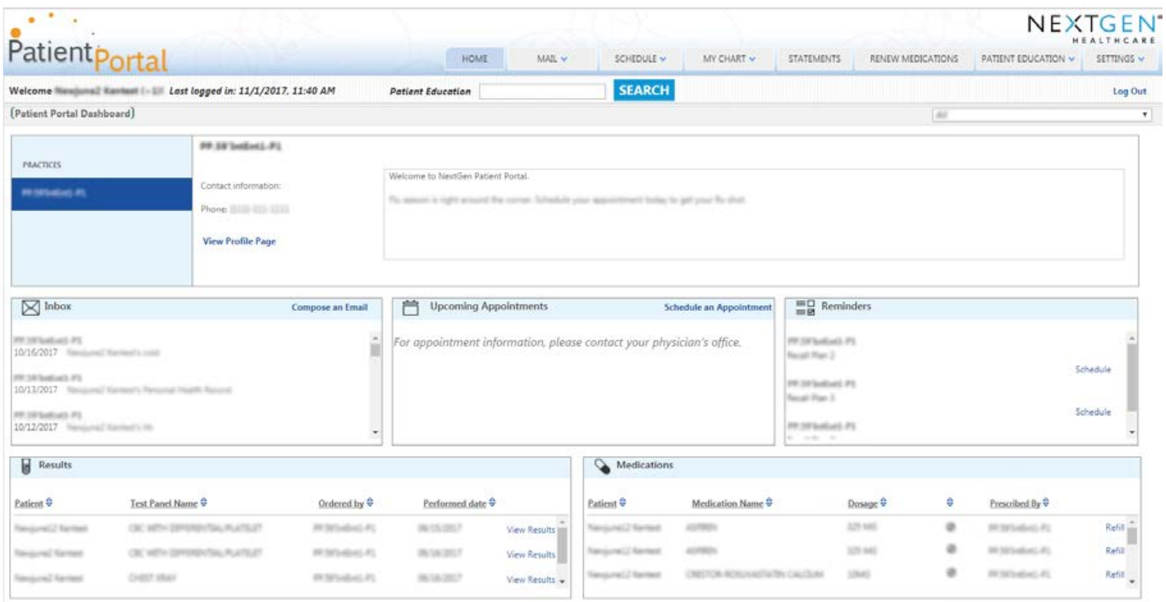
CHAPTER 9

Your Medications

The medications prescribed at the practice display in your NextGen Patient Portal account. You can send a request to your practice to renew your medications online.

Viewing Medications on the Home Page

The **Medications** section on the home page lists all your medications.



Sorting Medications in the Medications Section

You can sort your prescribed medications in ascending or descending order by clicking a column header in the **Medications** section. Additionally, you can also click the arrow next to each column header to sort the information in the section.

Icon	Description
⇕	This is the default icon for each column header. When you click this icon, the information is sorted in ascending order.
▲	This icon indicates that the information is sorted in ascending order. When you click this icon, the information is sorted in descending order.
▼	This icon indicates that the information is sorted in descending order. When you click this icon, the information is sorted in ascending order.

Renew Medications

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

1 On the NextGen Patient Portal home page, and then select Renew Medication.

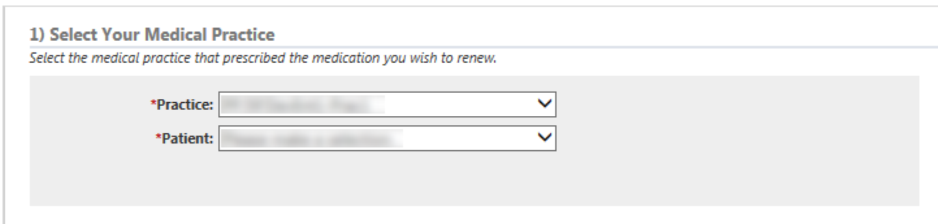
Or, From the NextGen Patient Portal home page, under Medications, click Refill.

2 On the Renew Medications form, under Select Your Medical Practice perform the following tasks:

a) From Practice, select the practice to renew your medication.

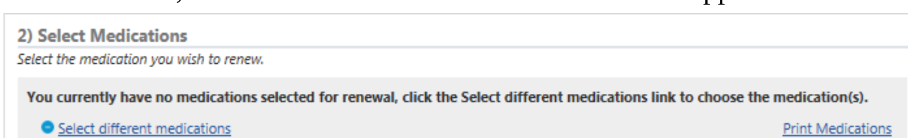
b) From Patient, select any one of the following:

- Self: to request medication renewal on your own behalf
- Dependent name: to request medication renewal on behalf of a dependent, select the name of the dependent

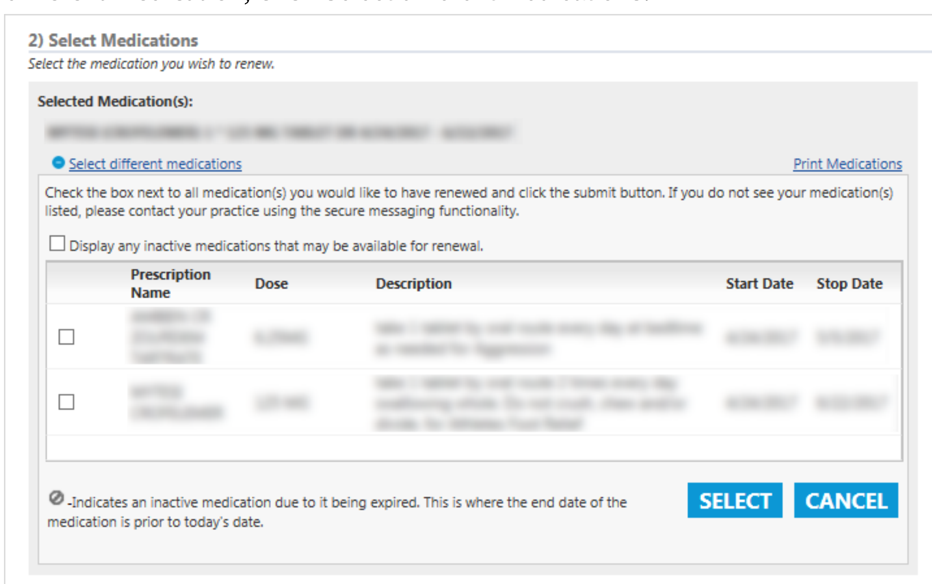


Note: If you are a care manager, the Patient list is displayed in the Select Your Medical Practice section.

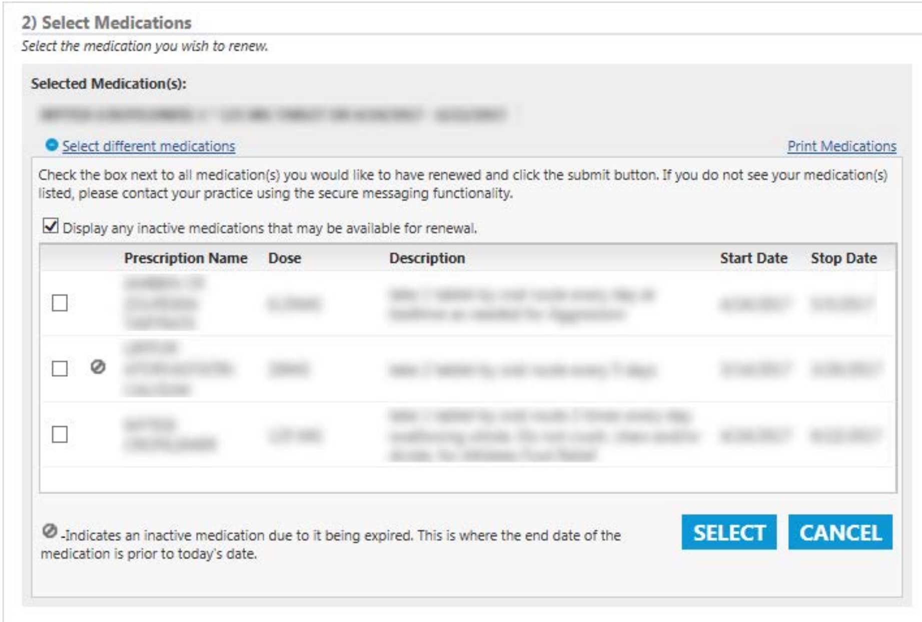
3 Under Select Medications, a list of medications available for renewal appears.



4 To select different medication, click Select different medications.

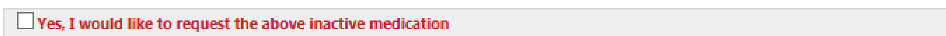


5 To view inactive medications, select Display any inactive medications that may be available for renewal.



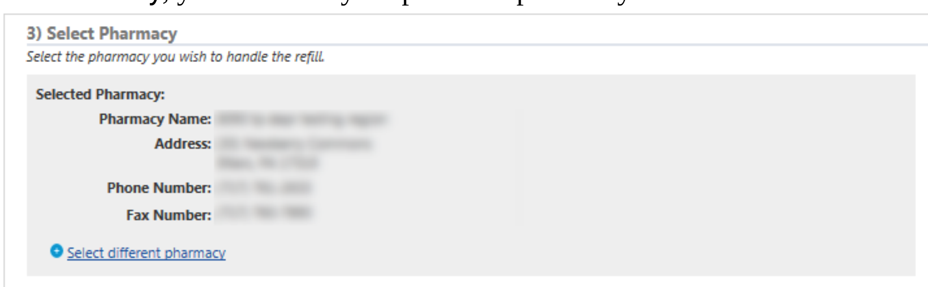
6 Select medication that you want to renew, and then click Select.

7 If you select inactive medications, select Yes, I would like to request the above inactive medication.

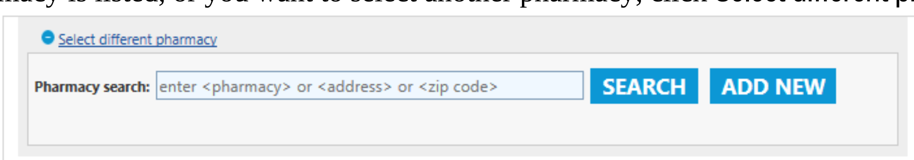


Note: If you are not selecting Yes, I would like to request the above inactive medication when renewing inactive medications, a warning message appears, click Submit.

8 Under Select Pharmacy, you can view your preferred pharmacy.



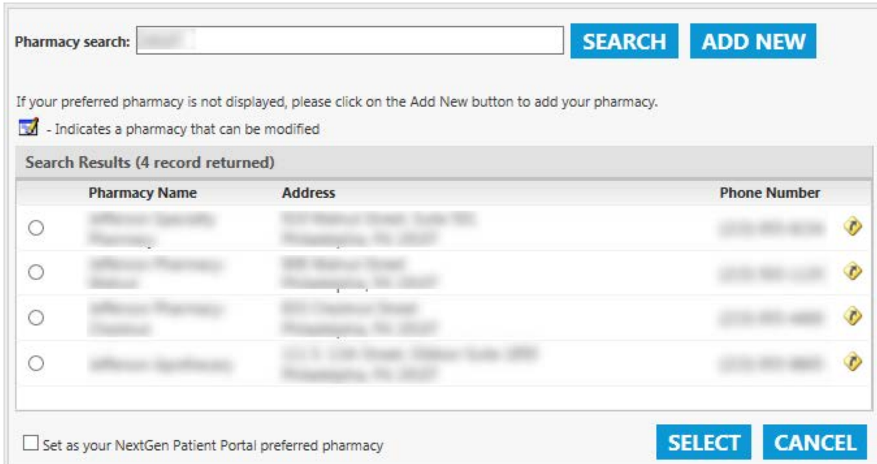
9 If no pharmacy is listed, or you want to select another pharmacy, click Select different pharmacy.



Note: If you want to add new pharmacy, see Add a new Pharmacy (on page 73).

10 To search all available pharmacies, click Search.

To locate a pharmacy, enter the search criteria (pharmacy name, address, city, state, or zip code), and then click Search.



If required, click the Map icon next to the pharmacy's phone number to view the location in a new window.

11 Click the pharmacy's name to select it.

12 To set the default pharmacy, select Set as your NextGen Patient Portal preferred pharmacy.

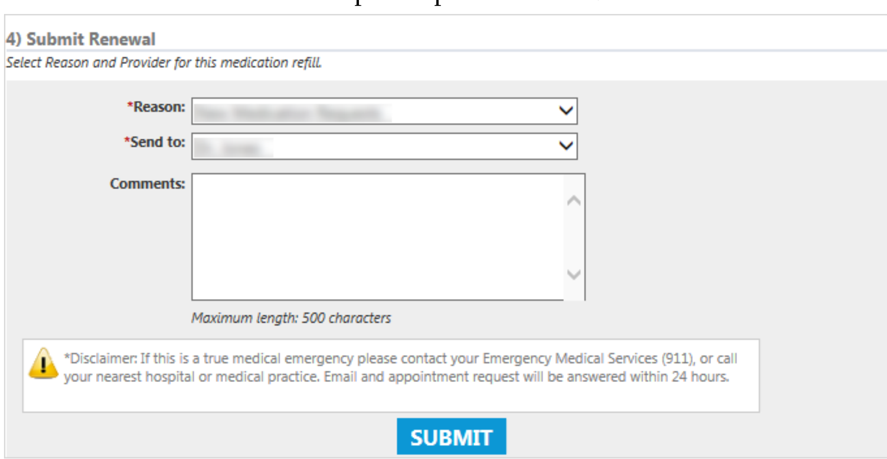
13 Click Select.

14 Under Submit Renewal, perform the following:

a) Select the Reason for renewal.

b) Select the Provider to whom you are sending the medication renewal.

c) In Comments enter the reason for the prescription renewal.



15 Click Submit.

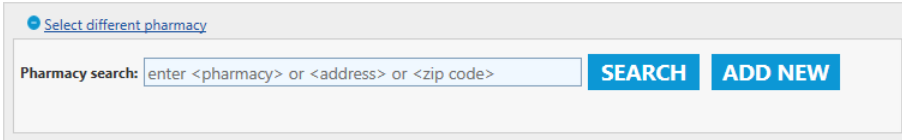
A message appears notifying you that your medication renewal request has been successfully submitted.

Note: If you do not select Yes, I would like to request the above inactive medication when renewing inactive medications, a warning message appears, click Submit.

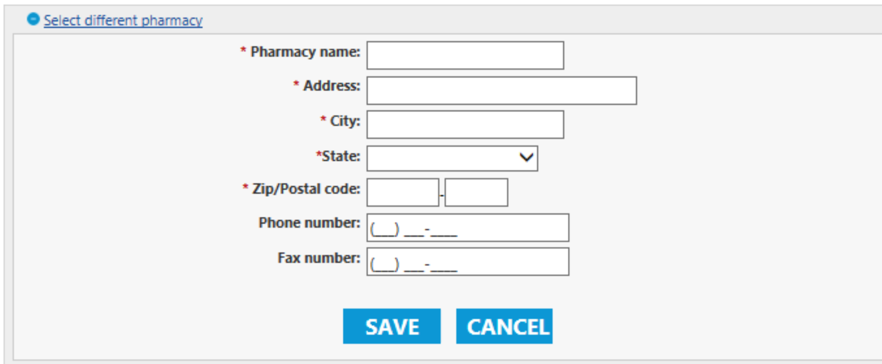
Add a New Pharmacy

You can add a new pharmacy if the pharmacy you want to use does not appear in the pharmacies list.

1 Under Select Pharmacy, click Select different pharmacy.



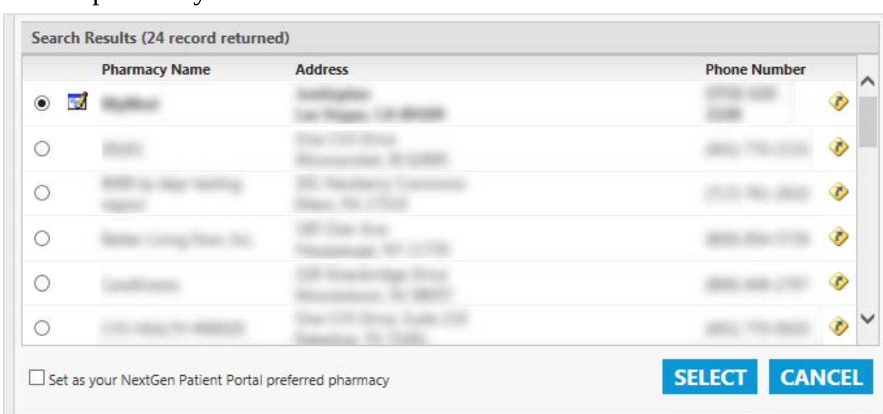
2 Click Add New.



3 Enter the pharmacy details, and then click Save.

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

The pharmacy that was just added appears at the top of the list. A Modify Pharmacy icon displays before the pharmacy's name.



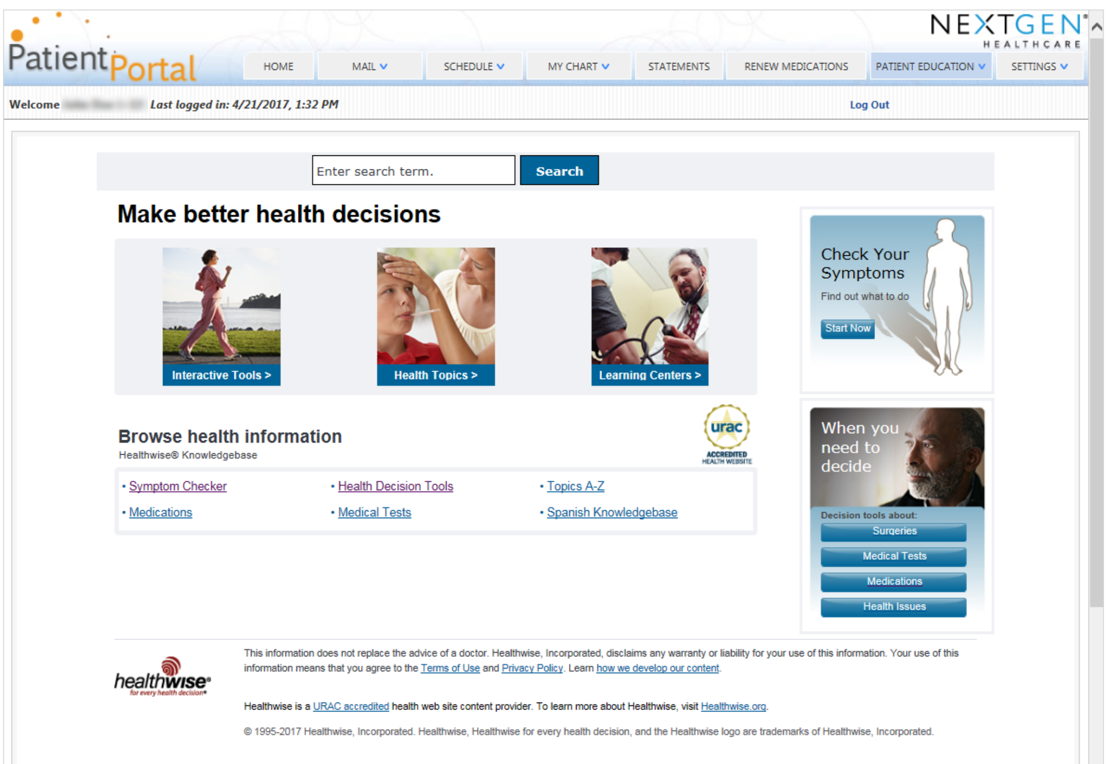
4 To change the pharmacy information, click the pharmacy's name and modify the details.

CHAPTER 10

Health Education Materials

You can get heath education material from the **Patient Education** tab. The patient education provides you access to Healthwise® Health Information Knowledgebase, which is an online health encyclopedia. You can access educational materials on a variety of patient education, symptom checker, medications, and health decision tools.

Note: 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 Utilization Review Accreditation Commission (URAC) accredited health website content provider. Click the following link to find out how this information was developed to help you make better health decisions: (https://www.healthwise.net/nextgen/Content/StdDocument.aspx?DOCHWID=support-abouthw#support-abouthw-editorial).



Search for Health Education Topics

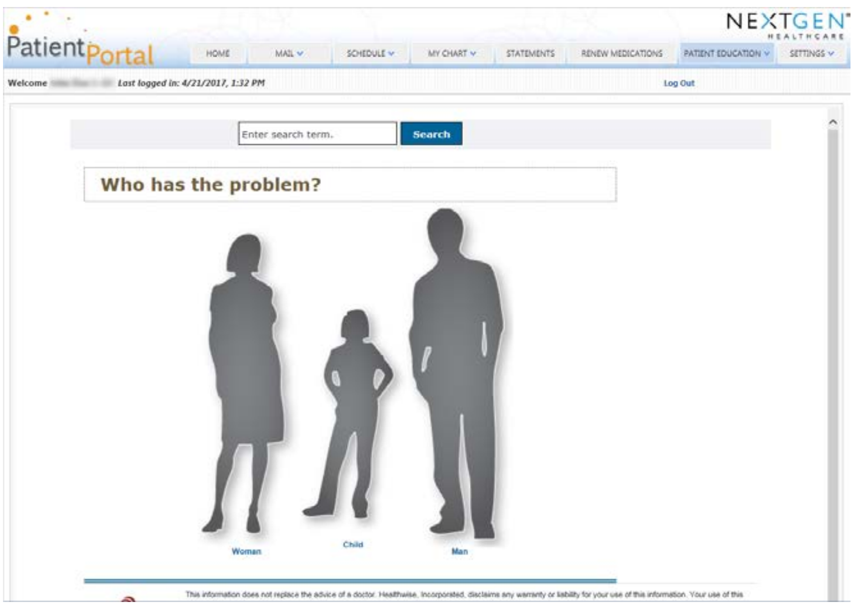
You can search for health educational topics that cover a variety of health topics.

1. On the NextGen Patient Portal home page, click Patient Education, and then select Patient Education.
2. You can perform the following tasks:
   - Search health topics: The search feature 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.
   - Access 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.

Use the Symptom Checker

You can check your symptoms by using the interactive tool that enables you to pick an area of the body, select your symptoms, and view related topics.

1. On the NextGen Patient Portal home page, click Patient Education, and then select Symptom Checker.
2. You can type the symptom and find the symptom related problems.

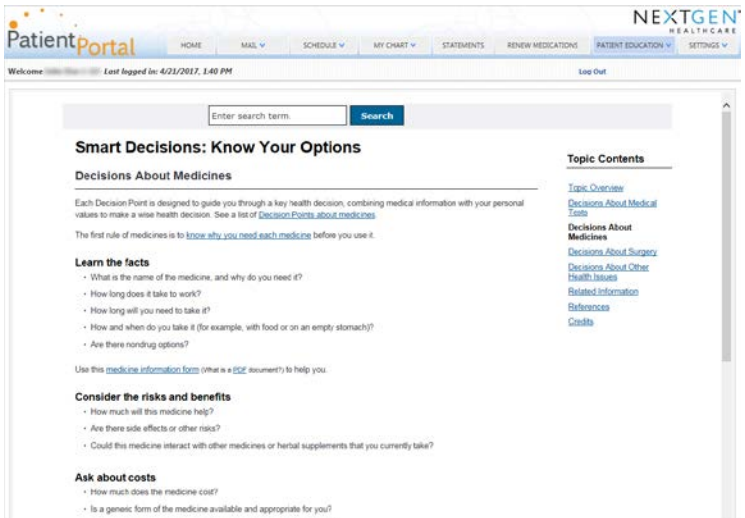


Read about Your Medication

You can get information about medications and take wise health decision.

1 On the NextGen Patient Portal home page, click Patient Education, and then click Medications.

2 Type the medication search term, and then click Search.

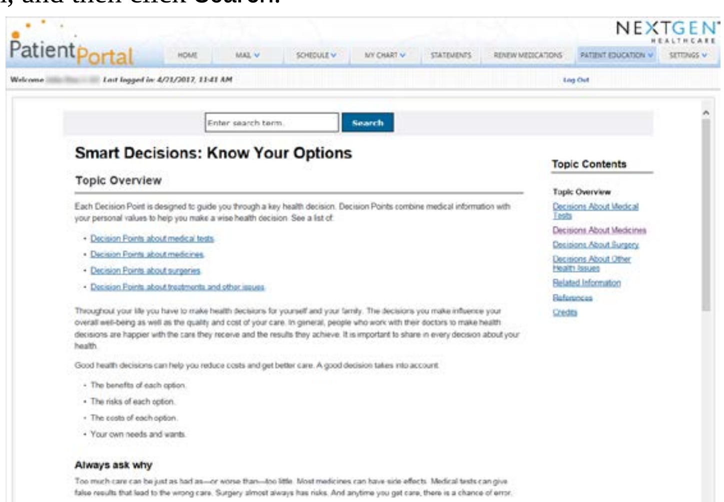


Health Decision Tools

You can search for related problems and you can get details. It helps you to make decision about your medicines and also duration of intake.

1 On the NextGen Patient Portal home page, click Patient Education, and then select Health Decision Tools.

2 Type your problem, and then click Search.



CHAPTER 11

Settings

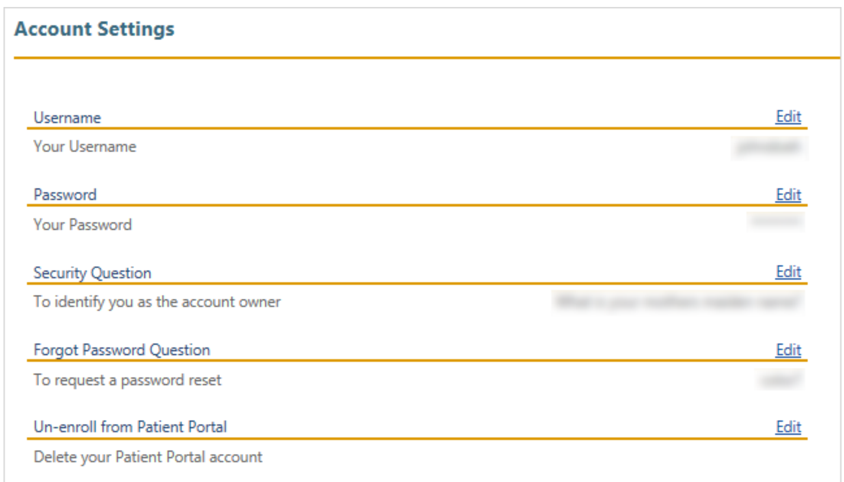
You can change your account settings, account information, manage user grants, and add additional practices to your NextGen Patient Portal account.

Account Settings

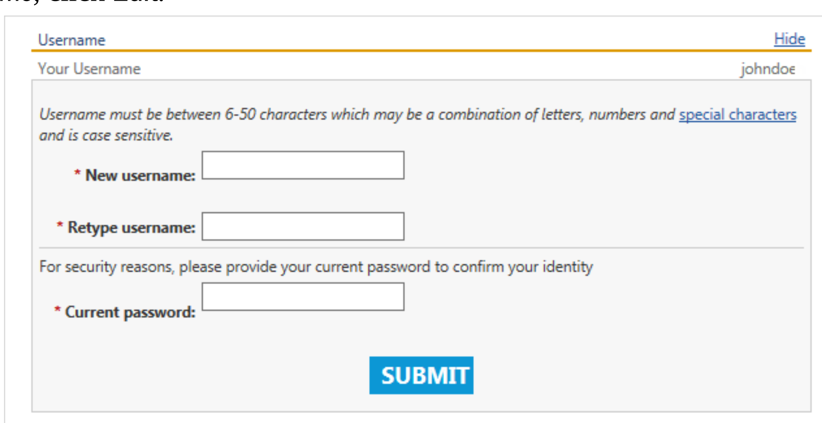
You can change your user name, password, security questions, forgot password question, and un-enroll from patient portal through account settings in your NextGen Patient Portal account.

Change your Username

1 On the NextGen Patient Portal home page, click Settings, and then select Account Settings.



2 Under Username, click Edit.



3 Under **Username**, do the following:

a) In **New username**, type your new user name.

b) In **Retype username**, re-type your new user name.

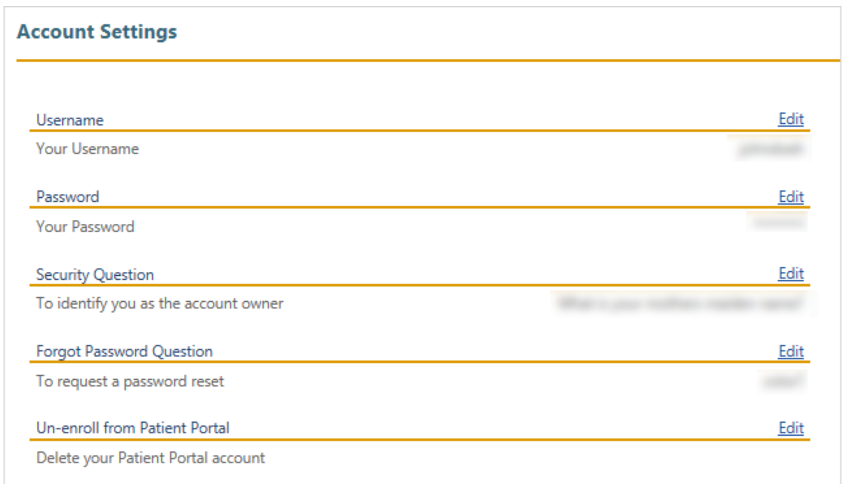
c) In **Current password**, type your current password.

4 Click **Submit**.

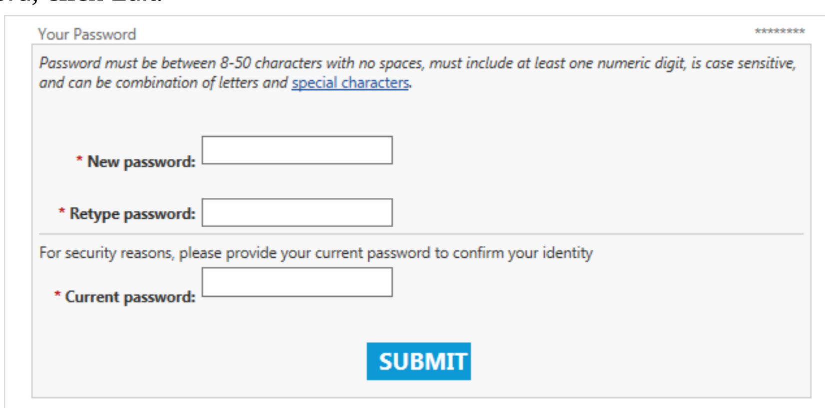
A message appears notifying you that your user name has been changed. Refresh the page to view your new user name.

Change your Password

1 On the NextGen Patient Portal home page, click **Settings**, and then select **Account Settings**.



2 Under **Password**, click **Edit**.



3 Under the **Password** details, do the following:

a) In **New password**, type your new password.

b) In **Retype password**, re-type the new password.

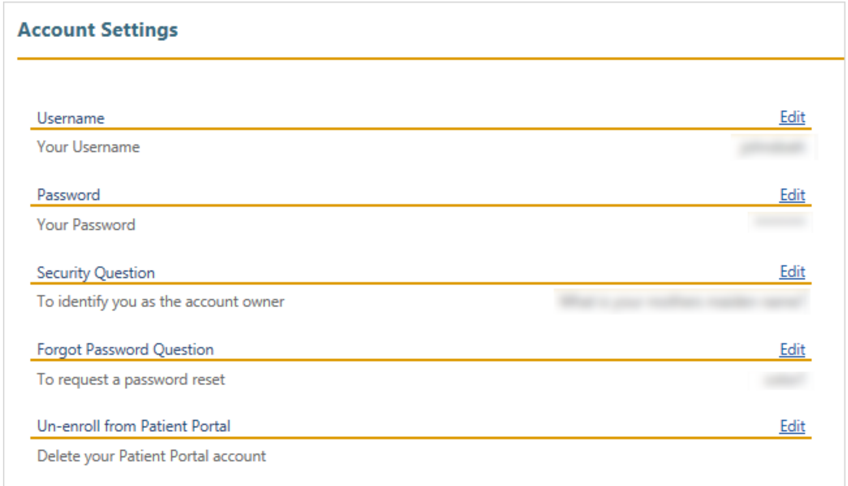
c) In **Current password**, type your current password.

4 Click **Submit**.

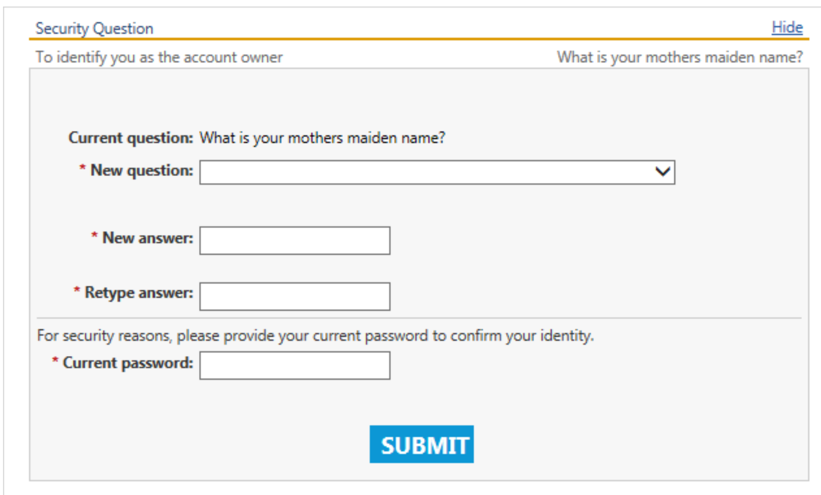
A message appears notifying you that password was updated. The next time you log on to the NextGen Patient Portal, you must use your new password.

Change your Security Question

1 On the NextGen Patient Portal home page, click Settings, and then select Account Settings.



2 Under Security Question, click Edit.



3 From the Security Question details, do the following:

a) From the New question list, select a new question.

b) In New answer, type an answer.

c) In Retype answer, re-type the answer.

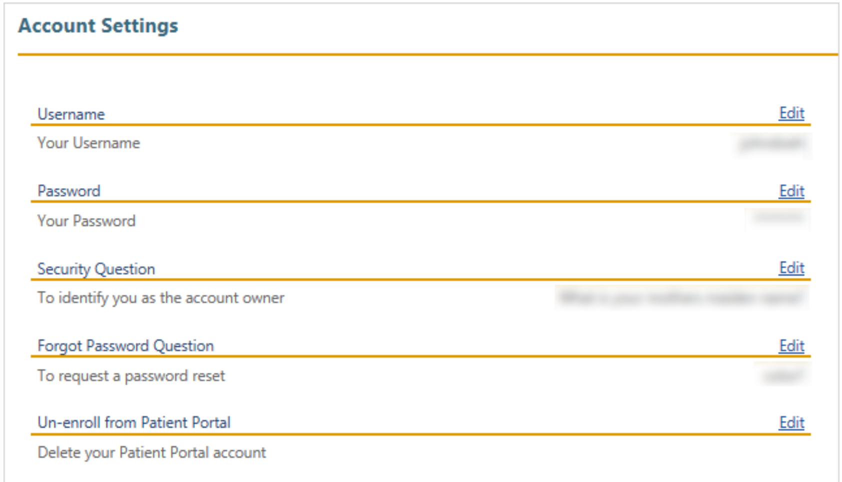
d) In Current password, type your current password.

4 Click Submit.

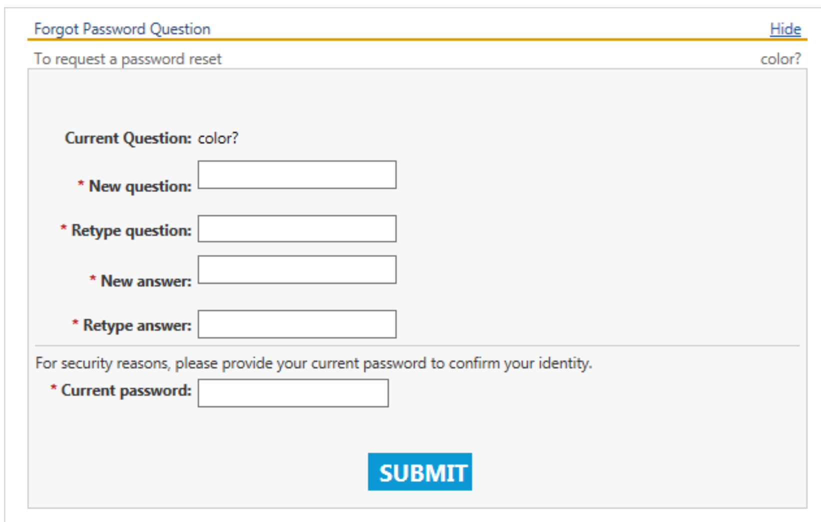
A message appears notifying you that your security question was updated.

Change your Forgotten Password Question

1 On the NextGen Patient portal home page, click Settings, and then select Account Settings.



2 From Forgot Password Question, click Edit.



3 Under Forgot Password Question, do the following:

a) In New question, type a new question.

b) In Retype question, re-type the new question.

c) In New answer, type an answer for the new question.

d) In Retype answer, re-type the answer.

e) In Current password, enter your current password.

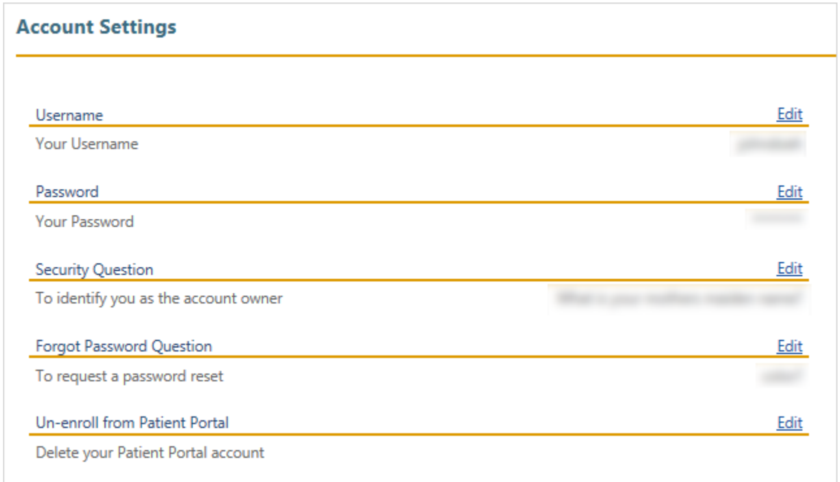
4 Click Submit.

The message appears notifying you that your forgotten password question has been updated.

Cancel your NextGen Patient Portal Enrollment

You can cancel your NextGen Patient enrollment at any time.

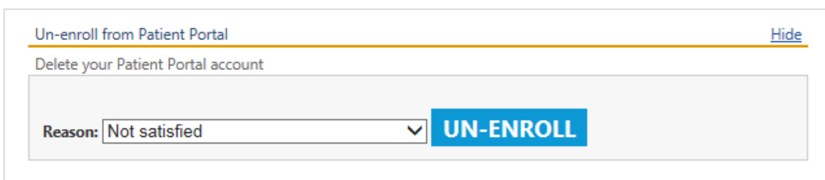
1 On the NextGen Patient Portal home page, click Settings, and then select Account Settings.



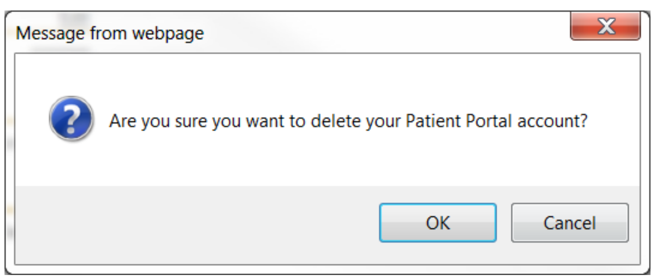
2 From Un-enroll from Patient Portal, click Edit.

3 From Reason, select a reason for un-enrolling from NextGen Patient Portal.

4 Click the Un-enroll button.



5 Click OK.



6 Click OK to un-enroll your NextGen Patient Portal account.

My Information

The My Information page displays your personal information such as your first and last name, date of birth, address, email address, and mobile numbers that you provide while visiting the practice.

To add or update any personal information, contact your practice. You can choose your preferred method of receiving the notifications.

Note: Depending on the practice configurations, this page may allow you to edit the information on this page. If the edit option is available, you can edit your name, date of birth, mobile phone number, and the email addresses.

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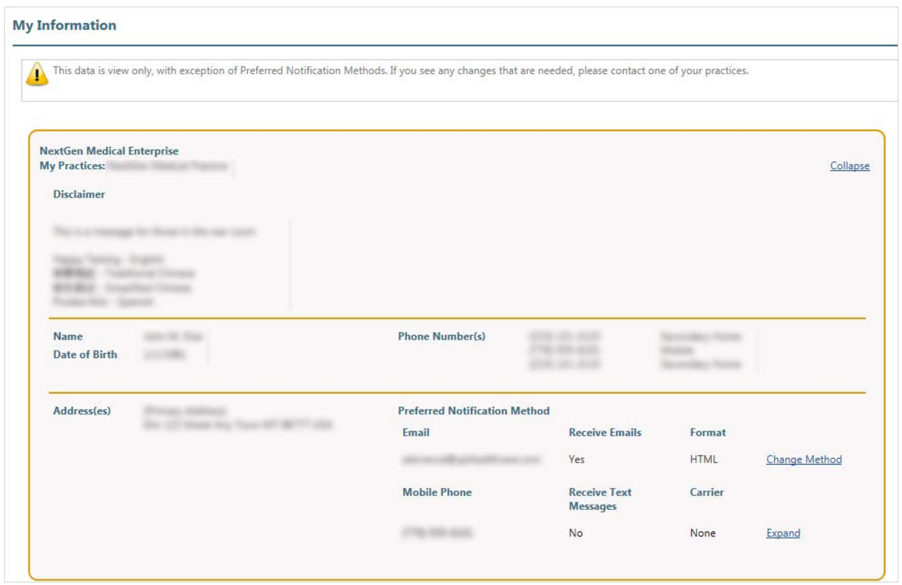
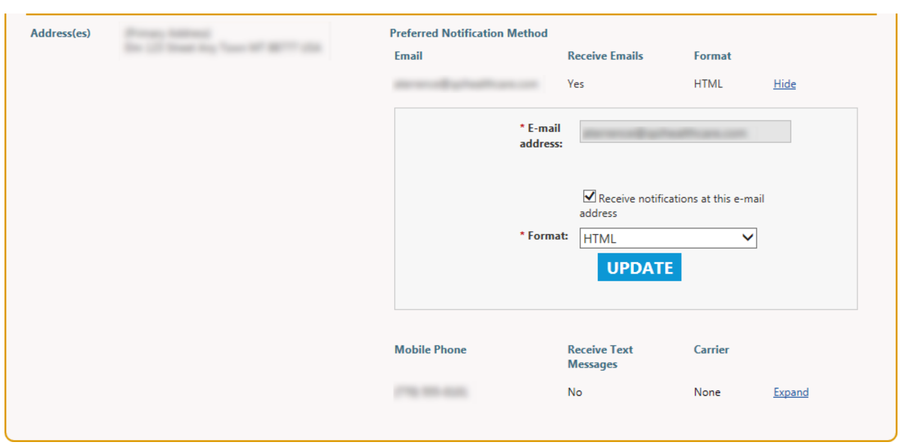
1. On the NextGen Patient Portal home page, click **Settings**, and then select **My Information**.
2. Under **Preferred Notification Method**, click **Change Method**.



3. Select **Receive notifications at this e-mail address** to receive notifications to your registered email address.

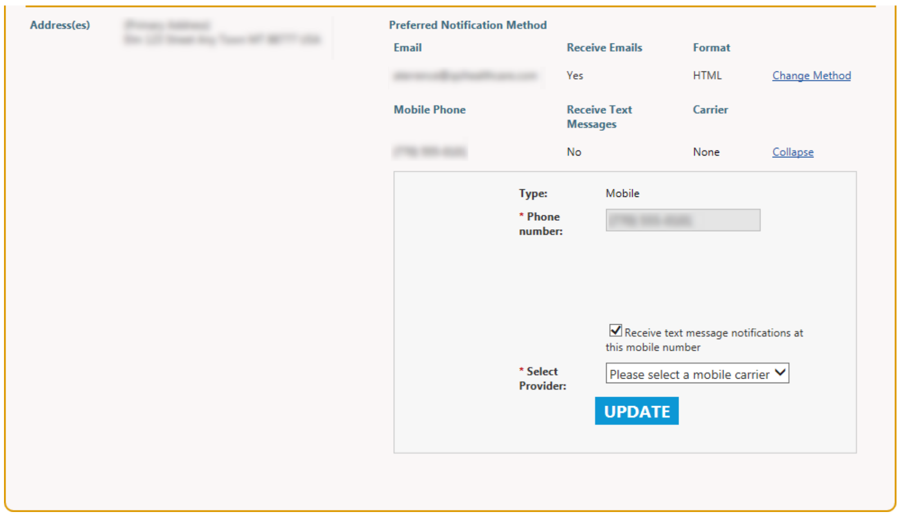


4 From the **Format** list, select **HTML** or **Plain Text** to set the email notification format.

5 Click **Update**.

6 To receive notifications via SMS, click **Change Method**.

7 Select **Receive text message notifications at this mobile number** to receive notifications on your registered number.



8 From the **Select Provider** list, select a network provider, and then click **Update**.

User Grants

The practice can set up relationships and assign care managers for dependents. As a care manager, you will have full or partial access of another user's account (dependent). If you are a dependent, you can 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. On NextGen Patient Portal, you can view the accounts of your dependents, such as child or a parent.

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. As a dependent, you can manage the rights and permissions provided to the care manager at any time on 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.

Care manager and dependent relationships can be terminated at any time by the dependent, or the practice. The dependent can terminate the relationship by corresponding with the practice and the practice then terminates, or the dependent can remove all access from the care manager on the site.

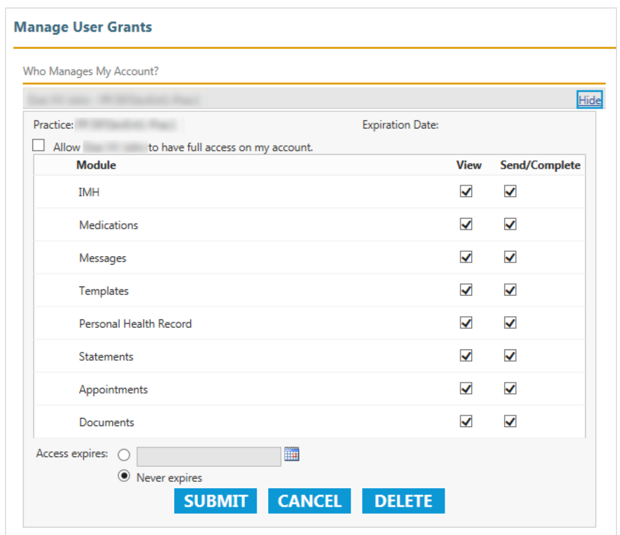
Manage Care Manager Grants

If your account has a care manager, you can provide the rights to view or complete selected information (such as appointments and medications) on your behalf.

You can also set an expiration date for the rights, or remove a care manager from your account.

1 On the NextGen Patient Portal home page, click Settings, and then select Manage User Grants.

2 Under Who Manages My Account, click Edit next to the person.



If a person managing your account has full access, all module will be unavailable on Manage User Grants.

3 To assign Care Manager access to individual modules, perform the following:

- Clear Allow full access to my account.
- To give view permission, for a particular module, select View.
- To give permission to complete or send a module on Manage User Grants, select Send/Complete column next to Module name.

4 To set a user grant date for your account:

a) Click Access expires.

b) Click Calendar and 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:

a) Click Delete. A confirmation message appears.

b) Click OK.

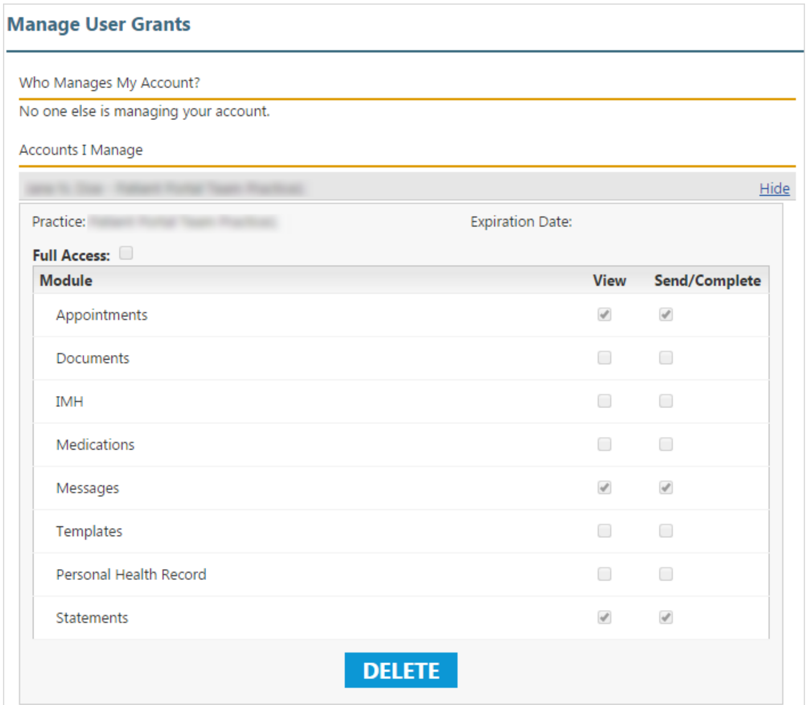
Manage Dependent Accounts

If configured by the practice, a care manager can view, send, or complete selected information, such as appointments and medications, on behalf the patient (dependent).

As a care manager, you can only view information based on the user rights that are provided to you. Only the patient (dependent) or the practice can provide or modify the access rights.

1 On the NextGen Patient Portal home page, click **Settings**, and then select **Manage User Grants**.

2 Under **Account I Manage**, click **Edit** 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 appears.

4 Click **OK**.

Manage Practices

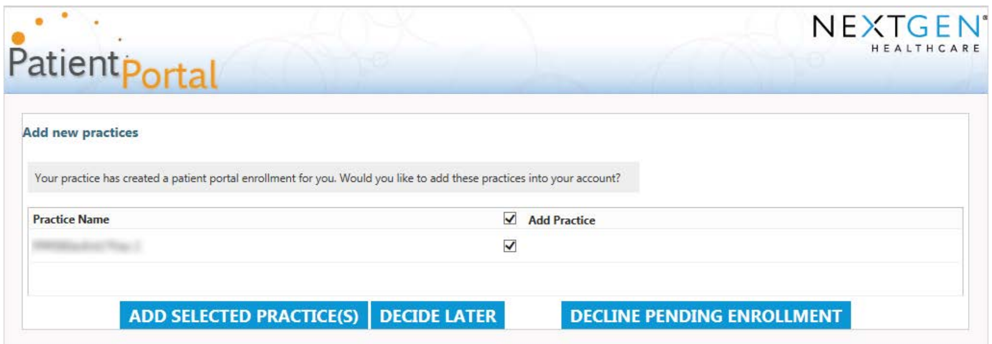
You can add additional practices to your NextGen Patient Portal account. You can also un-enroll from a practice.

Enroll to Practices in the same Enterprise

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

1 Log on to your NextGen Patient Portal account.

2 Select a new practice name.



3 Click Add Selected Practice(s). The selected practices are added to your account and you can view your practice on the Home page and Manage Practices page.

You can perform the following additional actions:

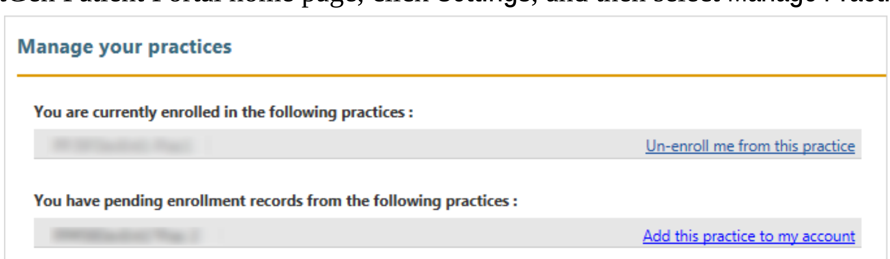
- Click Decide Later to complete enrollment.
- Click Decline Pending Enrollment if you do not want to enroll in a practice.

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

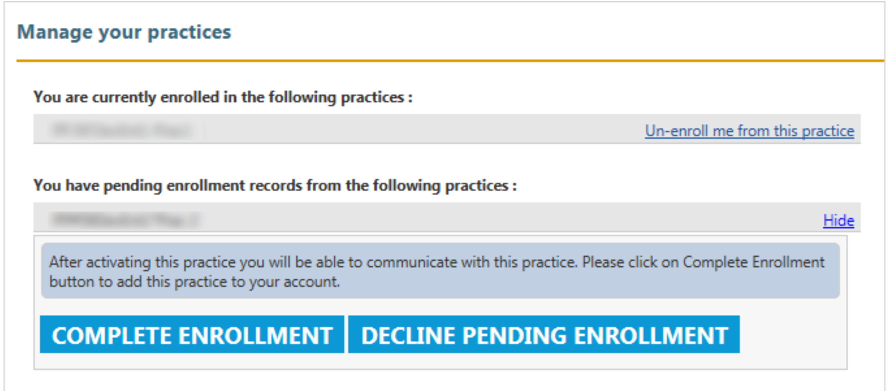
Confirm Pending Enrollment Requests

If you chose to add practices for same enterprises later, you can confirm pending enrollment request.

1 On the NextGen Patient Portal home page, click Settings, and then select Manage Practices.



2 Click Add this practice to my account.



3 Click Complete Enrollment.

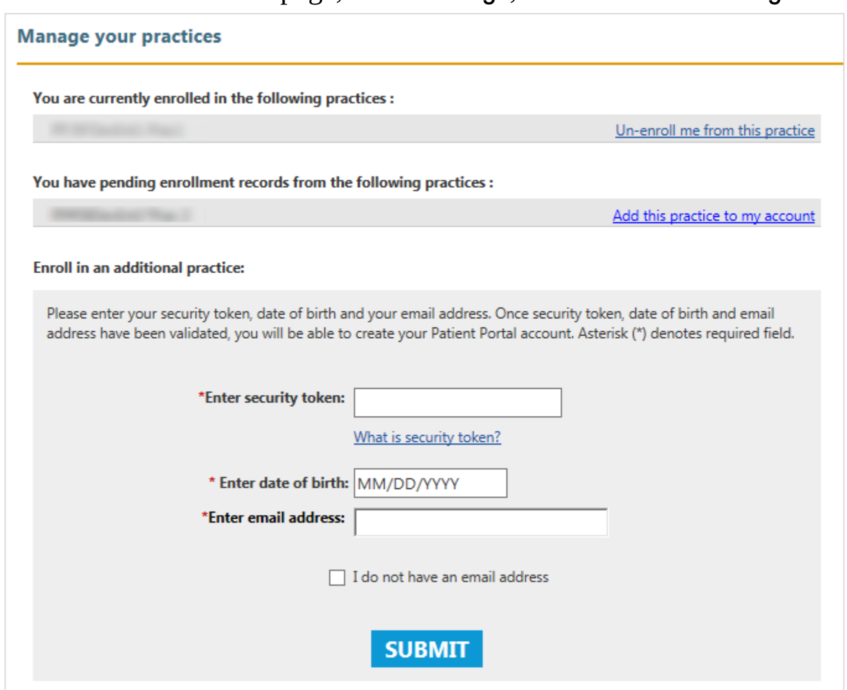
Note: Click Decline Pending Enrollment if you do not want to enroll to a practice(s). If you decline enrollment, you must request the practice to provide a security token to enroll again.

Enroll in another Practice

After completing your enrollment process with your practice, you can add another practice without performing the enrollment process. You do not need to use the link provided in the enrollment notification email sent by the new practice instead, use the following procedure.

Note: The patient should inform the new practice that they already have a NPP account.

1 On the NextGen Patient Portal home page, click Settings, and then select Manage Practices.



2 Enter the token number, and your date of birth.

3 Enter your email address in **Email Address**.

Note: If you do not have an email address click **I do not have an email address**, and then enter your last name.

---

4 Click **Submit**.

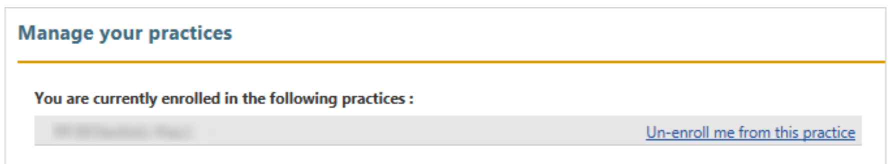
A confirmation message appears.

5 Click **OK** to continue.

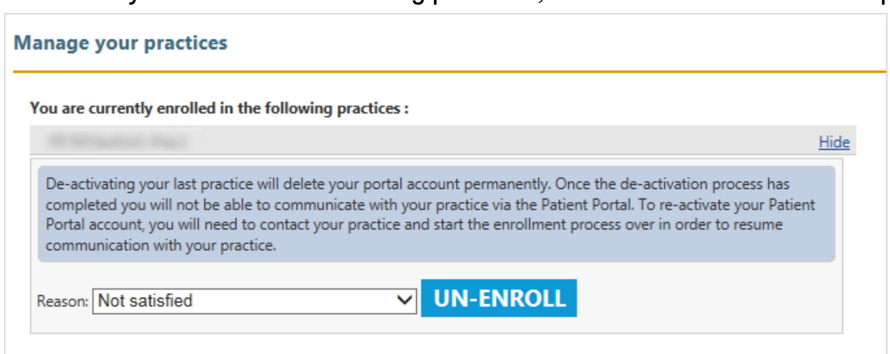
Un-enroll from the NextGen Patient Portal

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

1 On the NextGen Patient Portal home page, click **Settings**, and then select **Manage Practices**.



2 Under **You are currently enrolled in the following practices**, click **Un-enroll me from this practice**.



3 From **Reason**, select an applicable reason for un-enrolling from the practice.

4 Click **Un-enroll**.

A confirmation message appears.

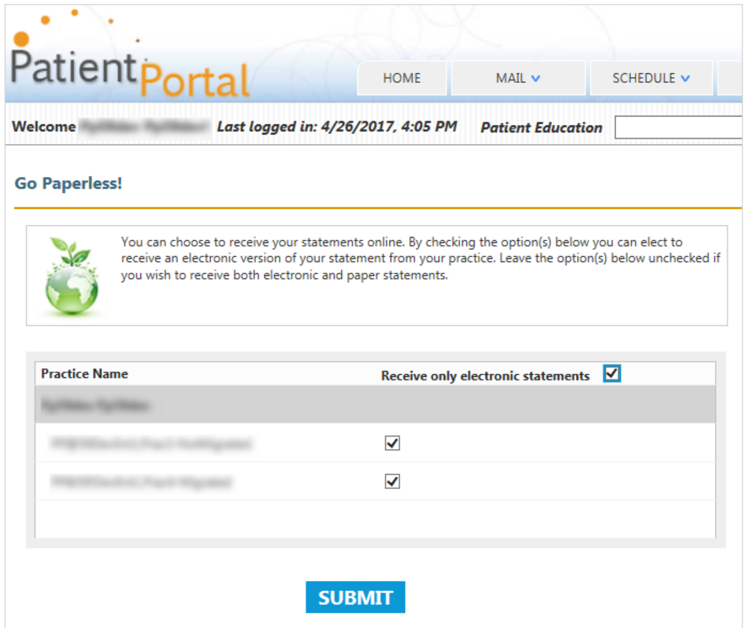
5 Click **OK** to remove your NextGen Patient Portal account.

Manage Statement Notifications

Based on your practice, you can receive only electronic statements through NextGen Patient Portal.

If you want to receive both electronic and paper statements, do not select the option.

1 On the NextGen Patient portal home page, click Settings, and then select Statement Notifications.



2 Perform one of the followings:

- Select Receive only electronic statements to receive only online statements for all practices that provide this service.
- Clear Receive only electronic statements to receive both electronic and paper statements for all practices.

For multiple practices that provide this service and if you want to select different options for each practice, select or clear the corresponding practice as needed.

3 Click Submit.

CHAPTER 12

Troubleshooting

Use this troubleshooting section when you need answers to common problems that you may encounter.

Locked Accounts

The portal locks your account after four unsuccessful log on attempts. After your second and third failed attempts to log on, a message appears notifying you that your account will be locked for 20 minutes after 4 unsuccessful attempts.

You cannot access your NextGen Patient Portal account once your account is locked. You can click **Need help with your username and password** to recover your logon details from your NextGen Patient Portal logon page. Your account will be automatically unlocked only after 20 minutes.

If the practice locks your account, you will receive an email stating that you need to contact the practice to unlock your account. During this time, you will not be able to access any mail or perform any tasks. Only the practice can unlock your account. You will receive another email stating that the account has been unlocked.

View Dependent Accounts

If your account is associated with dependent accounts, the user list appears with a list of the persons or dependents whose accounts you manage on the top right. You can select the name of a person or dependent from this list to view their records.

Recover My NextGen Patient Portal User Name

You can recover NextGen Patient Portal User name with the following steps:

1. Go to the NextGen Patient Portal website logon page.
2. Click **Need help with your username and password.**
3. Click **I forgot my Username.**
4. Type the requested information as provided to the practice during enrollment.
5. Click **Submit.**

   A message appears notifying you that an email containing your user-name has been successfully sent.
6. Open the email to view your user-name.

Recover My NextGen Patient Portal Password

You can recover your NextGen Patient Portal password with the following steps:

1 Go to the NextGen Patient Portal website logon page.

2 Click Need help with your username and password.

3 Click I forgot my Password.

4 Type your user-name.

5 Click Submit.

6 Type the answer for the security question, and then click Submit.

A message appears notifying you that an email containing your password reset link has been sent.

7 Open the email you received, and then click the Forgot Password Link.

8 Enter the following information under the following:

a) Reset your password

b) Reset your logon security authorization

c) Reset your password recovery credentials

9 Click Submit.

A message appears notifying you that an email containing your password has been sent.

10 Click OK to continue. The Login page appears.

11 Log on using your user-name and the new password.

Reset My Password with a Reset Token

You can reset your password with a reset token with the following steps:

1 Go to the NextGen Patient Portal website logon page.

2 Click Need help with your username and password, and then select I have my password reset token.

3 Enter the requested information.

4 Click Submit.

A message appears notifying you that an email containing your reset password link has been sent.

5 Open the email you received and click the Forgot Password Link.

6 In the Enter password reset token field, enter the same reset token as the one you used in step 4, and then click Submit.

7 Enter the following information under the following:

a) Reset your password

b) Reset your logon security authorization

c) Reset your password recovery credentials

8 Click Submit.

A message appears notifying you that an email containing your password has been sent.

9 Click OK to continue. The Login page appears.

10 Log on using your user-name and the new password.

Recover My NextGen Patient Portal Account

You can recover your NextGen Patient Portal account with the following steps:

1. Go to the NextGen Patient Portal website logon page.
2. Click **I do not remember any of my login credentials**.
3. Enter the requested information.
4. Click **Submit**.
5. Open the email you received, and then click the link to reset your credentials.
6. Enter the following information under the following:
   a) Reset your password
   b) Reset your logon security authorization
   c) Reset your password recovery credentials
7. Click **Submit**.

   A message appears notifying you that an email containing your password has been sent.
8. Click **OK** to continue. The Login page appears.
9. Log on using your user-name and the new password.

CHAPTER 13

NextGen Patient Portal Mobile

The NextGen Patient Portal mobile website is similar in functionality and provides most features that are available on the NextGen Patient Portal desktop website.

Supported Devices

For the mobile website, mobile devices running on Android™ 4.0 or higher, or Apple iOS 7.1 or higher are supported. A warning message appears, if the device is not compliant with the NextGen Patient Portal Mobile's security policies.

Supported Browsers

For mobile websites, the following browsers are supported:

- Microsoft Internet Explorer 9 and 10
- Android
- Apple Safari®
- Mozilla Firefox
- Google Chrome browser

System Requirements

To view PDF documents sent from the practice, you need the Adobe® Acrobat® Reader. You can download the latest version of the Adobe Acrobat Reader from the Adobe website: (http://get.adobe.com/reader/)

Note: Depending on your operating system and Adobe Acrobat Reader settings, you may be prompted to download the PDF documents to view them. In some cases, the browser settings or pop-up blocker applications can prevent documents from opening. You must also enable cookies and JavaScript in the browser for smooth functioning. Refer to the appropriate operating system, Adobe Acrobat Reader, browser, or pop-up blocker documentation for more information.

Access NextGen Patient Portal Mobile

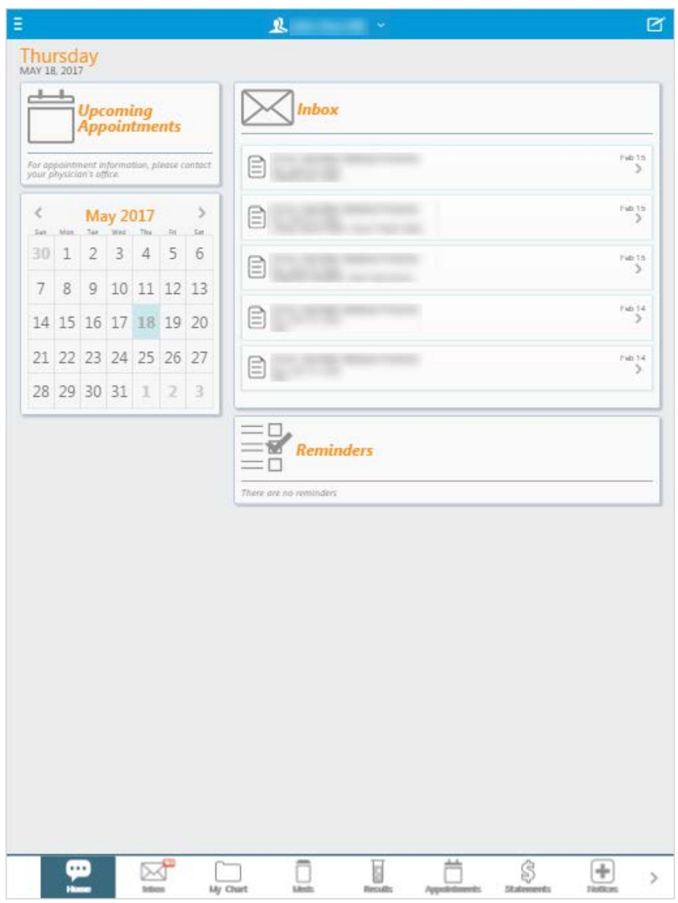
The NextGen Patient Portal mobile website is accessible, if you are enrolled in the NextGen Patient Portal.

You do not have to download any mobile application to access the NextGen Patient Portal. On your mobile device, either open your enrollment email and tap the Patient Portal link, or enter the link in your mobile browser to access the NextGen Patient Portal mobile site.

A link at the bottom of the NextGen Patient Portal desktop website is available to the Log In page to take you to the mobile site and vice versa.

NextGen Patient Portal Mobile Home Page

The NextGen Patient Portal mobile home page works similar to the NextGen Patient Portal desktop website's home page. Additionally, a calendar is available to view the appointments for the day.



Navigate NextGen Patient Portal Mobile

Use the following options to navigate the NextGen Patient Portal Mobile:

- Tap the menu at the bottom of the page.
- Tap menu on the top-left corner, and then tap a menu item.
- Tap back to return to the previous page.
- Tap left or right to display the previous and next view.
- Tap down or up to expand or collapse a section.
- Tap down or up to expand or collapse a list.
- Tap the compose message button to send an email to the practice.
- Tap the book appointment button to book an appointment with the practice.
- Tap the send chart button to send your PHR.
- Tap the renew medication button to renew your medication.

Index

