

NextGen Patient Portal

User Guide

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Document Revision History

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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.

Already a member?

Please note that the username and password fields are case sensitive and the password must contain at least one number.

Username

Password:

Need help with your username and password?

LOG IN

I am new here

- Have you been provided an enrollment token?
- Do you have a temporary username and password?

I AM NEW HERE

- 2 Click I Am New Here.

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

New to Patient Portal?

This is your first step to the enrollment process.

Please select the option that applies to you and provide the required information.

☐ I was given an enrollment token

☐ I have a temporary username and password

NEXT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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

New to Patient Portal?

This is your first step to the enrollment process.

Please select the option that applies to you and provide the required information.

☒ I was given an enrollment token

☐ I have a temporary username and password

* Enrollment token:

[What is security token?](#)

* Date of birth (mm/dd/yyyy):

* Email address:

☐ I do not have an email address

NEXT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

- 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.

- 7 Click **Next**.

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

Create enrollment credentials

Create your username

Enter a username you want to use when you login. Asterisk (*) denotes required field.

* Username:

Username must be between 6 and 50 characters which may be a combination of letters, numbers and [special characters](#) and is case sensitive.

9 Under Create your password, do the following:

- a) Type a password.
- b) Re-type the password to confirm it.

Create your password

Enter a password you want to use when you login. Asterisk (*) denotes required field.

* Password:

Password must be between 8 and 50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype password:

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.

Create your login security authorization

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (*) denotes required field.

* Select a question:

* Enter your answer:

* Retype your 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.


Create your password recovery credentials

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (*) denotes required field.

* Create a question:

* Enter your answer:

* Retype your answer:

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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.

The screenshot shows the login interface with two tabs. The 'Already a member?' tab is active, displaying fields for Username and Password, a help link, and a 'LOG IN' button. The 'I am new here' tab contains two bullet points about enrollment tokens and temporary credentials, along with an 'I AM NEW HERE' button.

Already a member?

Please note that the username and password fields are case sensitive and the password must contain at least one number.

Username
Username

Password:
Password

? Need help with your username and password?

LOG IN

I am new here

- Have you been provided an enrollment token?
- Do you have a temporary username and password?

I AM NEW HERE

- 2 Click I Am New Here.
- 3 Read the terms and conditions, and then click I Accept.

The screenshot shows the 'New to Patient Portal?' screen. It includes instructions to select an enrollment option, two radio button choices, 'NEXT' and 'CANCEL' buttons, and a 'FRAUD WARNING' section with a warning icon and text about fraudulent acts.

New to Patient Portal?


This is your first step to the enrollment process.

Please select the option that applies to you and provide the required information.

☐ I was given an enrollment token

☐ I have a temporary username and password

NEXT **CANCEL**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

- 4 Click I have a temporary username and password.

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

New to Patient Portal?

This is your first step to the enrollment process.

Please select the option that applies to you and provide the required information.

☐ I was given an enrollment token

☒ I have a temporary username and password

* Username:

* Password:

NEXT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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

Answer Your Security Question

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

What is your favorite color?

SUBMIT

- 7 Under Create your username type a user name.

Create enrollment credentials

Create your username

Enter a username you want to use when you login. Asterisk (*) denotes required field.

* Username:

Username must be between 6 and 50 characters which may be a combination of letters, numbers and [special characters](#) and is case sensitive.

- 8 Under Create your password, do the following:

- Type a password.
- Re-type the password to confirm it.

Create your password

Enter a password you want to use when you login. Asterisk (*) denotes required field.

* Password:

Password must be between 8 and 50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype password:

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.

Create your login security authorization
Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (*) denotes required field.

*** Select a question:**

*** Enter your answer:**

*** Retype your 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.

Create your password recovery credentials
Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (*) denotes required field.

*** Create a question:**

*** Enter your answer:**

*** Retype your answer:**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

SUBMIT

CANCEL

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

YOUR PRACTICE & INFORMATION
INSURANCE INFORMATION
ENROLLMENT CREDENTIALS
SCHEDULE APPOINTMENT

1) Enter Your Health Insurance Information (Optional)

☐ I am self-insured
 Insurance/Payer name:
 Policy number:
 Group number:
 Group name:

2) Enter Your Health Insurance Claim Mailing Address (Optional)

Address:
 City: State: ZIP/Postal Code:
 Country:
 Phone number:

BACK
NEXT
CANCEL

- 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.

YOUR PRACTICE & INFORMATION
INSURANCE INFORMATION
ENROLLMENT CREDENTIALS
SCHEDULE APPOINTMENT

FRAUD WARNING
Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

1) Create Username and Password

Create a username and password you want to use when you log in. Asterisk (*) denotes required field.

* Username:

Username must be between 6-50 characters which may be a combination of letters, numbers and [special characters](#) and is case sensitive.

* Password:

Password must be between 8-50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype Password:

7 Under Create Security Question, do the following:

- a) Select a security question.
- b) Type a security answer.
- c) Re-type the security answer.

2) Create Security Question

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk () denotes required field.*

* Select a Question:

* Answer:

* Retype 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

3) Create Password Recovery Credentials

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk () denotes required field.*

* Create a Question:

* Enter your answer:

* Retype Answer:

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**.

BACK	SCHEDULE AN APPOINTMENT	COMPLETE ENROLLMENT	CANCEL
-------------	--------------------------------	----------------------------	---------------

A confirmation message for enrollment appears.

Message from Practice

Thank you!

Your request(s) have been sent to the practice and is currently pending for approval. You will receive an email once it has been approved.

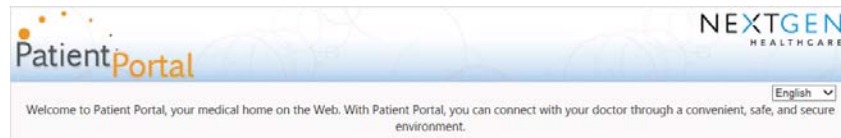
CHAPTER 3

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 log on.



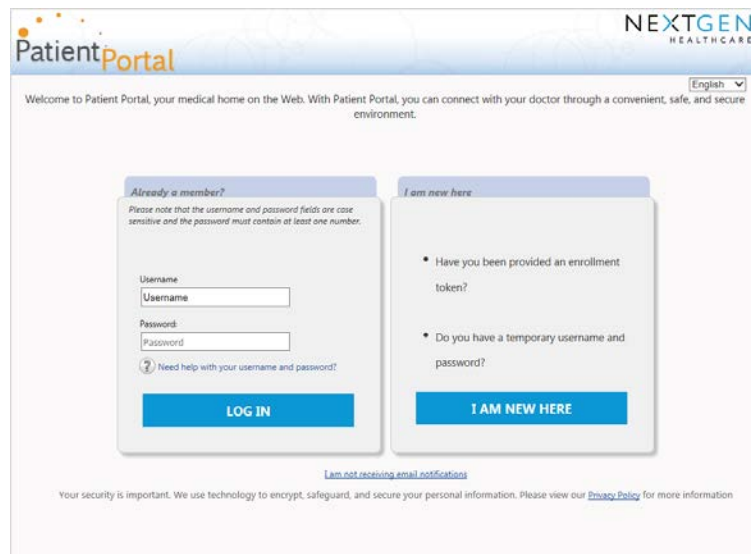
- To change the language before you log on, from the list on the top-right corner of the page, select the language.



- 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.

Answer Your Security Question



FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.


What is your mothers maiden name?

SUBMIT

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

Go Paperless!

You can choose to receive your statements online. By checking the option(s) below you can elect to receive an electronic version of your statement from your practice. Leave the option(s) below unchecked if you wish to receive both electronic and paper statements.



Practice Name	Receive only electronic statements
Ppnandev1 Ppnandev1	<input checked="" type="checkbox"/>
*****Contact Page 2	<input checked="" type="checkbox"/>

The practice in which you are currently enrolled can provide 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.

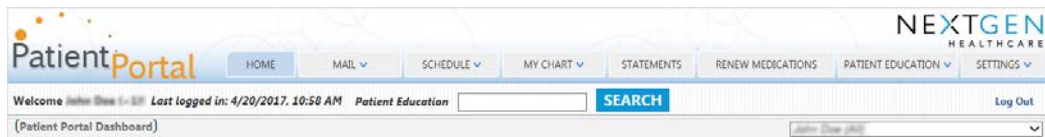
Your Home page displays your account name on the top left.

[illegible]

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

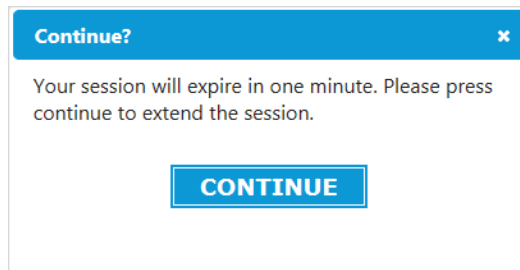
Log Off from NextGen Patient Portal Account

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.

The screenshot shows the NextGen Patient Portal login interface. At the top, the 'PatientPortal' logo is on the left and 'NEXTGEN HEALTHCARE' is on the right. Below the logo, a welcome message reads: 'Welcome to Patient Portal, your medical home on the Web. With Patient Portal, you can connect with your doctor through a convenient, safe, and secure environment.' A language dropdown menu is set to 'English'. A red warning message states: 'Account will be locked for 20 minutes after 4 failed login attempts. Please remember that username and password are case sensitive.' Below this, there are two main sections: 'Already a member?' and 'I am new here'. The 'Already a member?' section includes a note about case sensitivity, a red error message 'The credentials entered are invalid. Please remember that username and password are case sensitive. Please try again.', input fields for 'Username' and 'Password', a help link, and a 'LOG IN' button. The 'I am new here' section has two bullet points: 'Have you been provided an enrollment token?' and 'Do you have a temporary username and password?', followed by an 'I AM NEW HERE' button. At the bottom, there is a link for 'I am not receiving email notifications' and a security disclaimer.

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 login page.
- 2 Click Need help with your username and password.

Forgot your Login information?

I'm having problems signing in.

☐ I forgot my Username

☐ I forgot my Password

☐ I have my password reset token

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

FRAUD WARNING
Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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

Forgot your Login information?

I'm having problems signing in.

☒ I forgot my Username

Please enter your information below so that we can locate your account.

* Last Name:

* Email address:

* Date of Birth (mm/dd/yyyy):

☐ I forgot my Password

☐ I have my password reset token

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

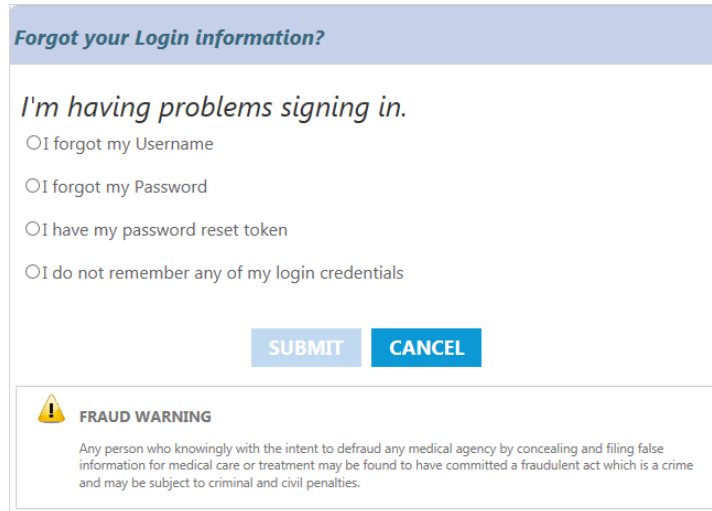
FRAUD WARNING
Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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.**


Forgot your Login information?

I'm having problems signing in.

☐ I forgot my Username

☐ I forgot my Password

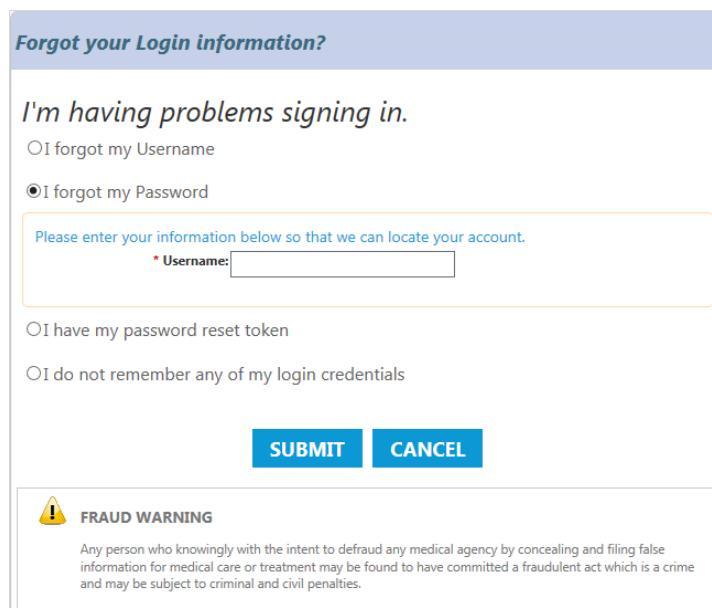
☐ I have my password reset token

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

3 Click I forgot my Password.**4 Type your username.**


Forgot your Login information?

I'm having problems signing in.

☐ I forgot my Username

☒ I forgot my Password

Please enter your information below so that we can locate your account.

* Username:

☐ I have my password reset token

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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.

Reset your credentials

To reset your credentials, answer your forgotten password security question. An email will be sent containing a URL for you to reset your password. The forgotten password security answer is not case sensitive.

SUBMITCANCEL



FRAUD WARNING
 Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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

8 Enter the following information under the following:

- Reset your password
- Reset your logon security authorization
- Reset your password recovery credentials

Reset login credentials


FRAUD WARNING
 Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Username:

Reset your password

Enter a password you want to use when you login. Asterisk (*) denotes required field.

* Password:
Password must be between 8-50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype password:

Reset your login security authorization

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (*) denotes required field.

* Select a question:

Please choose a security question.

* Enter your answer:

* Retype your answer:

Reset your password recovery credentials

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (*) denotes required field.

* Create a question:

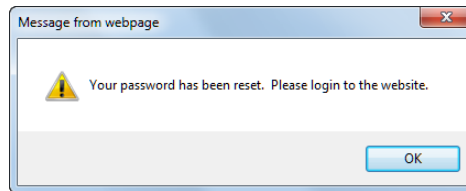
* Enter your answer:

* Retype your answer:

SUBMITCANCEL

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

Forgot your Login information?

I'm having problems signing in.

☐ I forgot my Username

☐ I forgot my Password

☐ I have my password reset token

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

3 Enter the requested information.

Forgot your Login information?

I'm having problems signing in.

☐ I forgot my Username

☐ I forgot my Password

☒ I have my password reset token

Please enter your information below so that we can locate your account. Your password reset token should have been provided by your practice.

* Reset token:

* Email address:

* Date of Birth (mm/dd/yyyy):

☐ I do not remember any of my login credentials

SUBMIT **CANCEL**

FRAUD WARNING

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

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

Reset login credentials


FRAUD WARNING
Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Username:

Reset your password

Enter a password you want to use when you login. Asterisk (*) denotes required field.

* Password:

Password must be between 8-50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype password:

Reset your login security authorization

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (*) denotes required field.

* Select a question: Please choose a security question.

* Enter your answer:

* Retype your answer:

Reset your password recovery credentials

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (*) denotes required field.

* Create a question:

* Enter your answer:

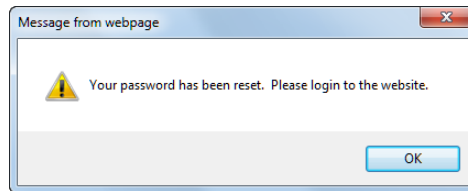
* Retype your answer:

SUBMIT

CANCEL

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

Reset login credentials

 **FRAUD WARNING**
Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Username:

Reset your password
Enter a password you want to use when you login. Asterisk (*) denotes required field.

* Password:
Password must be between 8-50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be a combination of letters and [special characters](#).

* Retype password:

Reset your login security authorization
Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (*) denotes required field.

* Select a question: ▼

* Enter your answer:

* Retype your answer:

Reset your password recovery credentials
Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (*) denotes required field.

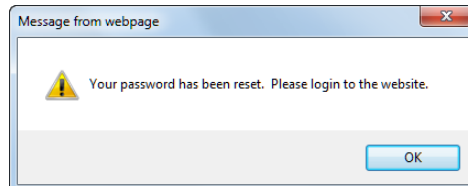
* Create a question:

* Enter your answer:

* Retype your answer:

- 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

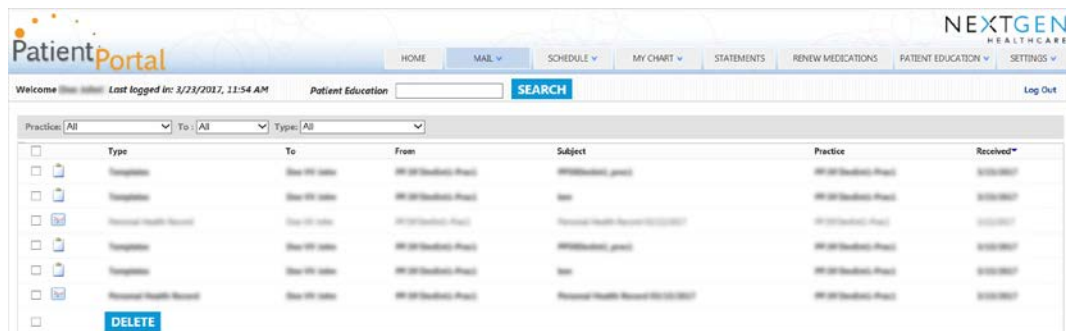
Your Mail

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**.

The screenshot shows the NextGen Patient Portal interface. At the top, there's a navigation bar with tabs: HOME, MAIL (selected), SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION, and SETTINGS. Below the navigation bar, there's a welcome message and a search bar. The main content area displays a list of appointments. The list has columns for Type, To, From, Subject, Practice, and Received. There are five rows of appointments, each with a checkbox on the left. A DELETE button is visible at the bottom left of the list.

	Type	To	From	Subject	Practice	Received*
<input type="checkbox"/>	Appointment	John Doe	Dr. Smith	Appointment	ABC Healthcare	1/1/2017
<input type="checkbox"/>	Appointment	John Doe	Dr. Smith	Appointment	ABC Healthcare	1/1/2017
<input type="checkbox"/>	Appointment	John Doe	Dr. Smith	Appointment	ABC Healthcare	1/1/2017
<input type="checkbox"/>	Appointment	John Doe	Dr. Smith	Appointment	ABC Healthcare	1/1/2017
<input type="checkbox"/>	Appointment	John Doe	Dr. Smith	Appointment	ABC Healthcare	1/1/2017

DELETE

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

The screenshot shows the 'Patient Portal' interface with the 'MAIL' tab selected. A message titled 'This appointment request is awaiting your response' is displayed. The message includes details about the appointment request, such as the date practice responded, proposed appointment date, proposed provider, and proposed location. Below the message, there is a section for the 'Original Appointment Request' with fields for Patient Name, Date sent to practice, Requested provider, Requested category, Requested location, Appointment priority, 1st preferred, 2nd preferred, and Reason for appointment.

- 3 Depending on the type of appointment, you can:
- Accept an appointment.
 - Reply to an appointment request with a reason.
 - Recall an appointment request.
 - Print an appointment.
 - Export your booked appointment to a Calendar.
 - Remove an appointment. (Removing an appointment is not the same as cancelling your appointment in the practice scheduled appointment list).

View Attached Documents

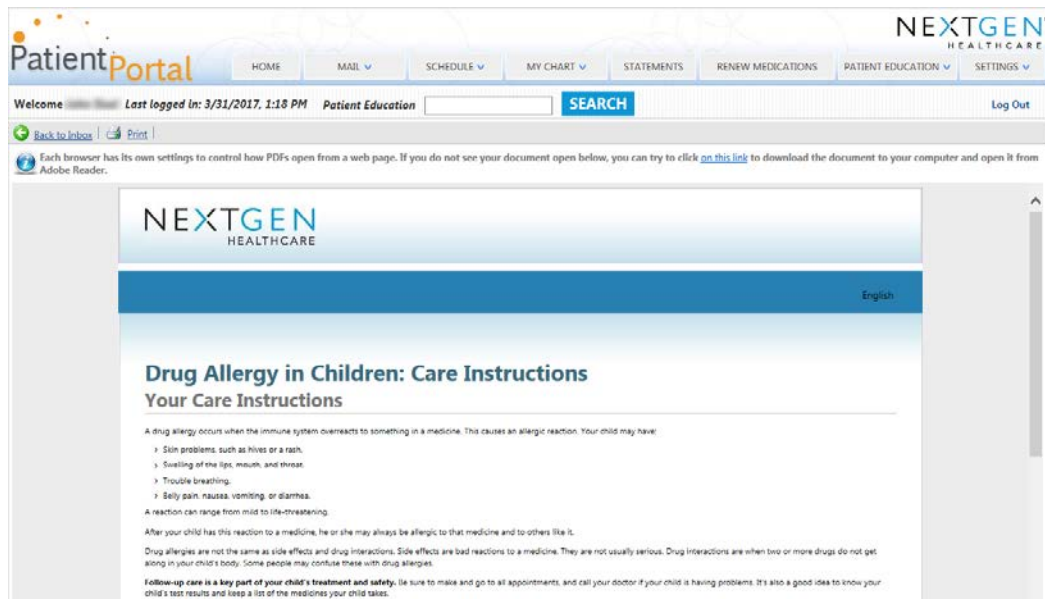
You can view documents shared by your practice. To view attached documents you require Adobe[®] Acrobat[®] Reader. If you do not have it installed, you can download and install it from the Adobe website <https://get.adobe.com/reader/>.

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

The screenshot shows the 'Patient Portal' interface with the 'MAIL' tab selected. The 'Inbox' is displayed, showing a list of documents. The table has columns for Type, To, From, Subject, Practice, and Received. There are five documents listed, each with a checkbox in the 'Type' column and a 'DELETE' button at the bottom left.

Type	To	From	Subject	Practice	Received*
<input type="checkbox"/> Documents	John A. Doe	WV HHS (NextGen) (Prac)	Simple Item	WV HHS (NextGen) (Prac)	3/13/2017
<input type="checkbox"/> Documents	John A. Doe	WV HHS (NextGen) (Prac)	Patient Portal Appointment Request	WV HHS (NextGen) (Prac)	3/13/2017
<input type="checkbox"/> Documents	John A. Doe	WV HHS (NextGen) (Prac)	Learning About Practice Mailings	WV HHS (NextGen) (Prac)	3/13/2017
<input type="checkbox"/> Documents	John A. Doe	WV HHS (NextGen) (Prac)	Drug Allergy in Children (Case Study)	WV HHS (NextGen) (Prac)	3/13/2017
<input type="checkbox"/> Documents	John A. Doe	WV HHS (NextGen) (Prac)	Lab Results	WV HHS (NextGen) (Prac)	3/13/2017

- 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.

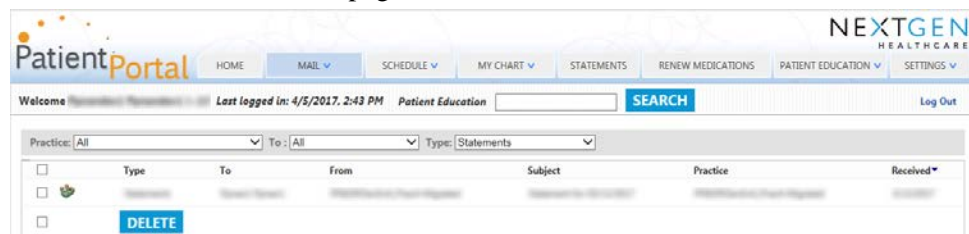


The comments entered by your practice appear on **Document Comments**. You can view your practice comment in the Document Comments window, if you are viewing the document for the first time.

Access Statements from Inbox

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

- 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**.

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

PatientPortal HOME MAIL SCHEDULE MY CHART STATEMENTS RENEW MEDICATIONS PATIENT EDUCATION SETTINGS

Welcome [User Name] Last logged in: 4/6/2017, 5:21 PM Patient Education SEARCH Log Out

Back to Inbox Remove Print

This Medication Renewal is Complete

Patient Name: [Name]
 Pharmacy: [Pharmacy Name]

Request sent: [Date]
 Reason for request: [Reason]
 Response received: [Date]
 Response from practice: [Date]

Medication(s) Requested

Status	Prescription	Dose	Route	Description
Accepted	[Prescription]	[Dose]	[Route]	[Description]

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.

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

PatientPortal HOME MAIL SCHEDULE MY CHART STATEMENTS RENEW MEDICATIONS PATIENT EDUCATION SETTINGS

Welcome [User Name] Last logged in: 6/7/2017, 1:12 PM Patient Education SEARCH Log Out

Practice: All To: All Type: Messages

Type	To	From	Subject	Practice	Received*
Message	[To]	[From]	[Subject]	[Practice]	[Received]
Message	[To]	[From]	[Subject]	[Practice]	[Received]
Message	[To]	[From]	[Subject]	[Practice]	[Received]
Message	[To]	[From]	[Subject]	[Practice]	[Received]

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

PatientPortal HOME MAIL SCHEDULE MY CHART STATEMENTS RENEW MEDICATIONS PATIENT EDUCATION SETTINGS

Welcome [User Name] Last logged in: 6/7/2017, 1:12 PM Patient Education SEARCH Log Out

Back to Inbox Reply Remove Print

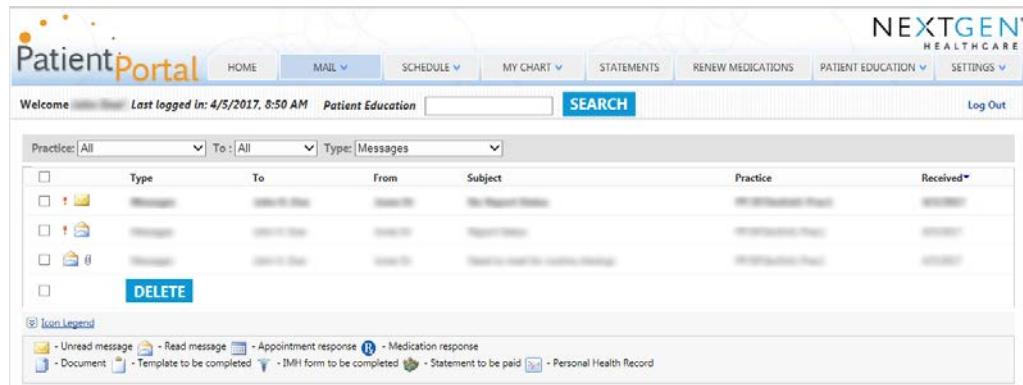
Forms - Message

From: [From]
 To: [To]
 Received: [Received]
 Attachments: [Attachments]

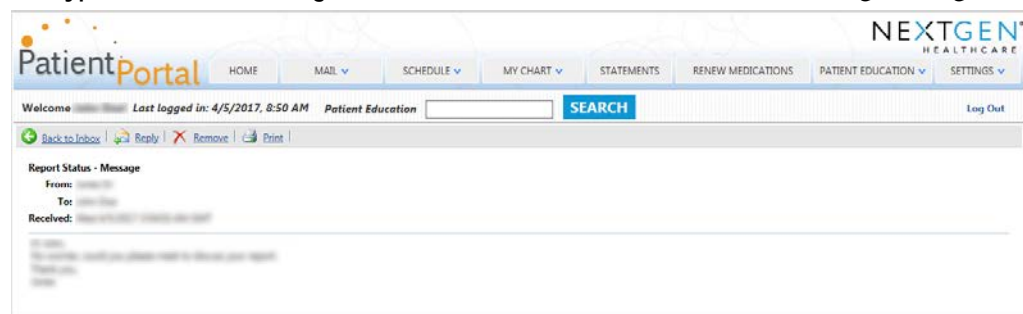
Reply to Messages

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.

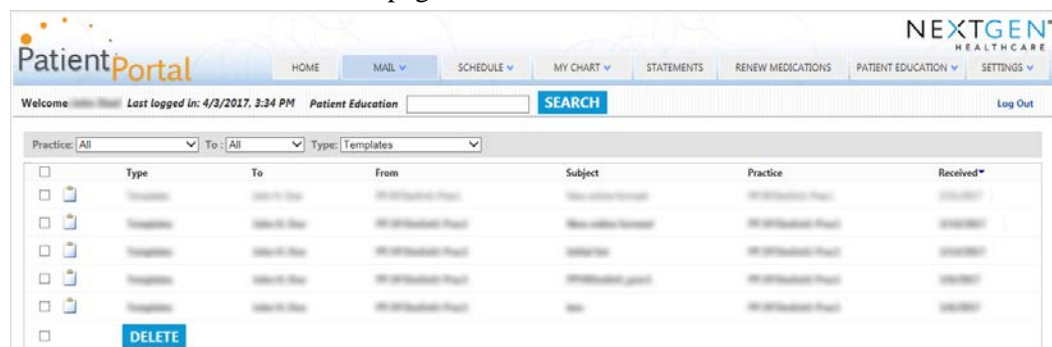


- 3 From the message details, you can:
 - Click **Reply** to reply to a message.
 - Click **Remove**, to remove a message
 - Click **Print**, to print a message.

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**.

The screenshot shows the NextGen Patient Portal interface. At the top, there's a navigation bar with links: HOME, MAIL (selected), SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION, and SETTINGS. Below the navigation bar, there's a welcome message and a search bar. The main content area displays a list of messages under the heading 'Interactive Medical Forms'. The list has columns for Type, To, From, Subject, Practice, and Received. There are two messages listed, both from 'NextGen Health' to 'Patient Education'. A 'DELETE' button is visible at the bottom left of the list.

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

The screenshot shows the NextGen Patient Portal interface with the 'MAIL' tab selected. Below the navigation bar, there's a 'Please answer the following interactive questions' section. It includes a 'Back to Inbox' button, a 'Save' button, and a 'Print' button. The questionnaire is titled 'Adolescent (12-18) Exam Questionnaire'. The first question is 'Have you recently felt that you were ill or unwell?' with four radio button options: 'Not at all', 'No more than usual', 'Rather more than usual', and 'Much more than usual'. At the bottom of the questionnaire, there are three buttons: 'BACK', 'NEXT', and 'SKIP QUESTION'.

- 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.

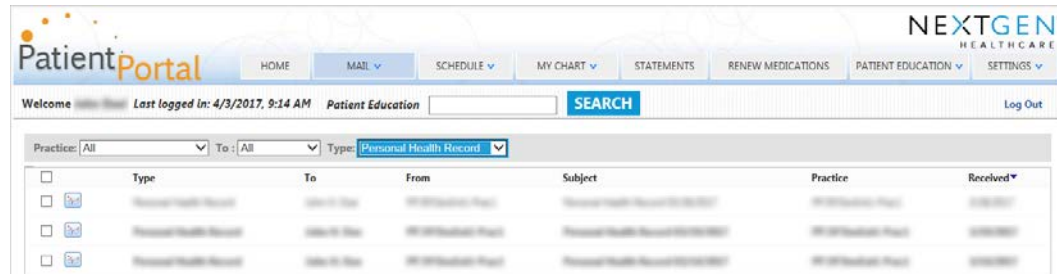
The screenshot shows the NextGen Patient Portal interface with the 'MAIL' tab selected. Below the navigation bar, there's a 'Please Review the Answers' section. It includes a 'Back to Inbox' button, a 'Submit' button, a 'Start Over' button, and a 'Print' button. The section is titled 'Please Review the Answers'.

- 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.

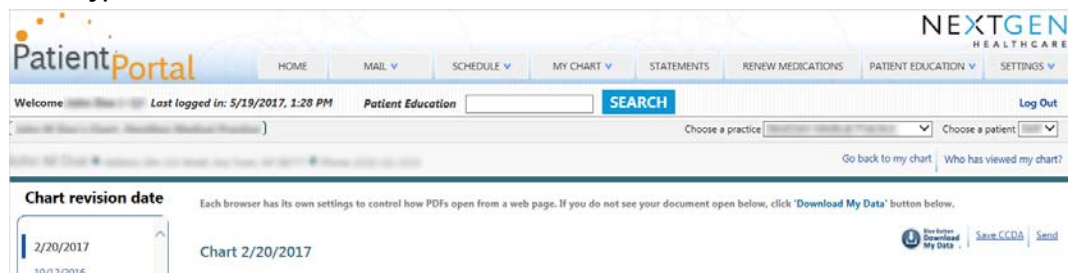
View Personal Health Records (PHR)

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.



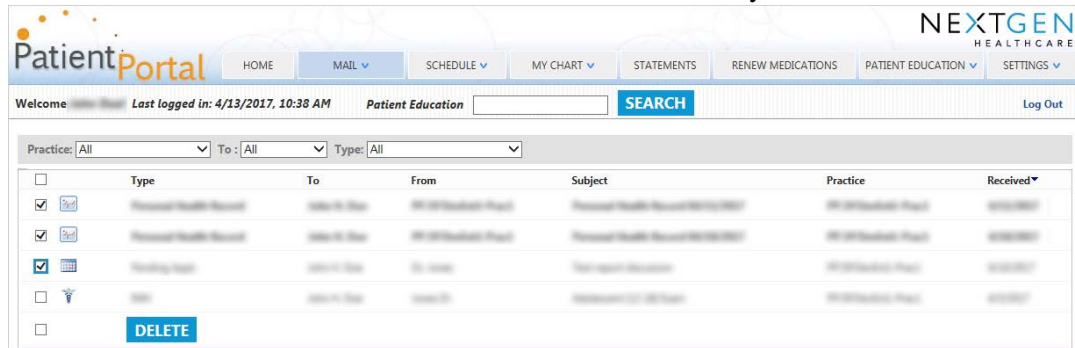
Most recent PHR update appears on the top of the message list.

- 3 From the PHR message page, you can:
 - > Click **Download My Data**, to download and save the chart.
 - > Click **Save CCD**, 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.

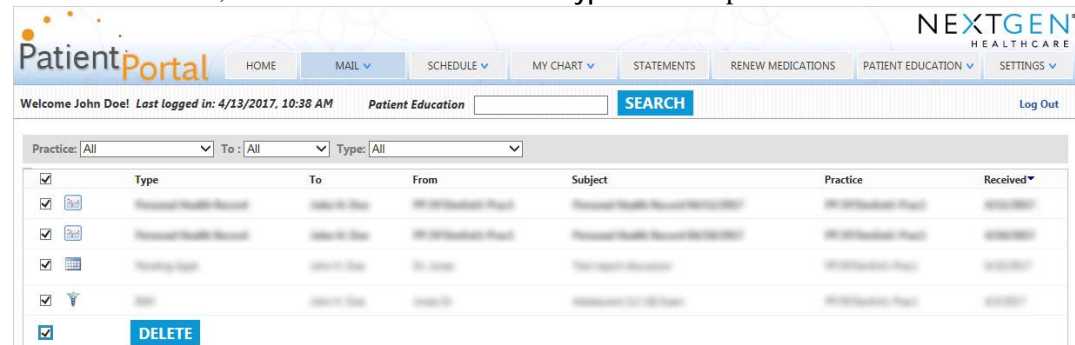
Delete Inbox Items

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.

The screenshot shows the 'Compose Message' form. At the top, it says 'Compose Message' in blue. Below that is a section header '1) Select Practice and Patient'. Under this header, there is a label '*Practice:' followed by a dropdown menu with a downward arrow.

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

- 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.

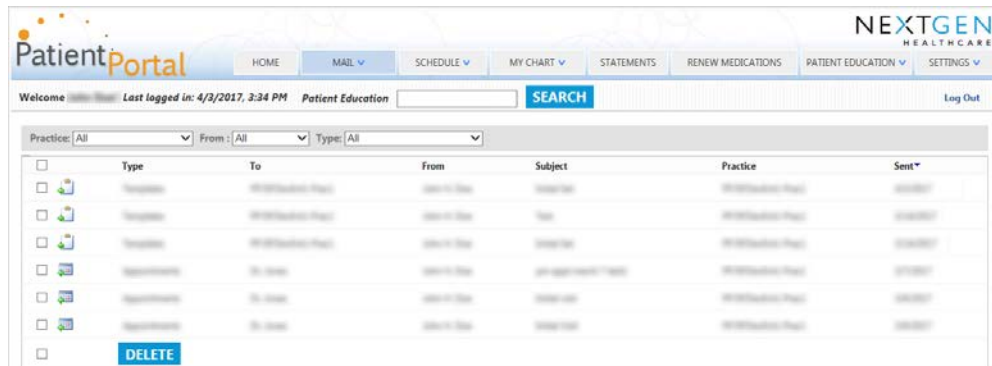
The screenshot shows the '2) Select Message Category and Recipient' section of the form. It includes a sub-header '2) Select Message Category and Recipient' and a note: 'Please select the appropriate message category and recipient from the drop down lists below. Asterisk (*) denotes required field.' Below this, there are four fields: '*Category:' with a dropdown menu showing 'Please make a selection.', '*To:' with a dropdown menu showing 'Please make a selection.', '*Subject:' with a text input field, and '*Message:' with a large text area. At the bottom of the form, there is a blue 'SUBMIT' button. A disclaimer box with a warning icon is also present, stating: '*Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.'

- 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.

Appointment Request

1. ENTER REQUEST 2. SELECT APPOINTMENT 3. VIEW DETAILS

1) Select Your Medical Practice
Please select the medical practice for that appointment.

*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.

2) Select Provider and Location
Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (*) denotes required field.

*Select provider/group:

*Select category:

*Select location: [Address](#)

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

2) Select Provider and Location
Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (*) denotes required field.

*Select provider/group:

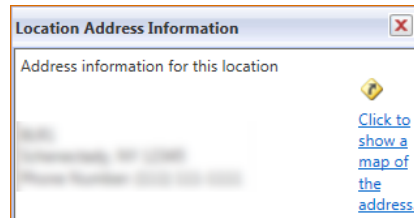
*Select category:

*Select location: [Address](#)

Hours of operation:
 Mon: 6:00 AM - 9:30 PM
 Tue: 6:00 AM - 9:30 PM
 Wed: 6:00 AM - 9:30 PM
 Thu: 6:00 AM - 9:30 PM
 Fri: 6:00 AM - 9:30 PM
 Sat: 6:00 AM - 9:30 PM
 Sun: 6:00 AM - 9:30 PM

- 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) Search Appointment
Your provider has real time booking enabled for the selected category and location. Please fill in all required fields and click the SEARCH button.

*Reason for appointment:


*Priority: Normal

*Make appointment for: This Week

*Start date: 04/10/2017 End date: 04/16/2017

*Preferred date/time: 9:30 AM to 5:30 PM

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☐ Sun

 *Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.


SEARCH

- 3 Click Search. Select an appointment from the list.

Appointment Request

1. ENTER REQUEST 2. SELECT APPOINTMENT

Results will show the first few available appointments. If you do not agree with any of the dates and times please click on the **Submit Request** button. Please click on the corresponding radio button next to the appointment date and time you prefer. Appointment selection shows the first few available appointments.

 This is an Real Time Appointment...!

Provider/Group	Location	Date
<input type="radio"/> Dr. Smith	West Longview - 17750	04/10/2017 9:30 AM
<input type="radio"/> Dr. Smith	West Longview - 17750	04/10/2017 10:00 AM
<input type="radio"/> Dr. Smith	West Longview - 17750	04/10/2017 10:30 AM
<input type="radio"/> Dr. Smith	West Longview - 17750	04/10/2017 11:00 AM
<input type="radio"/> Dr. Smith	West Longview - 17750	04/10/2017 11:30 AM

[Load more >>](#)

BOOK APPOINTMENT

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.

3) Search Appointment

Your provider has real time booking enabled for the selected category and location. Please fill in all required fields and click the .

*Reason for appointment:


*Priority:

*Make appointment for:

*Start date: End date:

*Preferred date/time: to

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

 *Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.

SEARCH

SUBMIT REQUEST


- 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**.

Appointment Request

1. ENTER REQUEST 2. SELECT APPOINTMENT

Results will show the first few available appointments. If you do not agree with any of the dates and times please click on the

Please click on the corresponding radio button next to the appointment date and time you prefer. Appointment selection sho

 This is an Real Time Appointment...!

Provider/Group	Location	Date
<input type="radio"/> Dr. Smith	West Wing/Room 100	04/10/2017 10:00 AM
<input type="radio"/> Dr. Smith	West Wing/Room 100	04/10/2017 11:00 AM
<input type="radio"/> Dr. Smith	West Wing/Room 100	04/10/2017 12:00 PM
<input type="radio"/> Dr. Smith	West Wing/Room 100	04/10/2017 1:00 PM
<input type="radio"/> Dr. Smith	West Wing/Room 100	04/10/2017 2:00 PM

[Back to first available](#) [Load more >>](#)

BOOK APPOINTMENT

- 6 Click **Make another appointment**, to make another appointment.

Appointment Request

1. ENTER REQUEST 2. SELECT APPOINTMENT 3. VIEW DETAILS

Your appointment is booked

You can find all of your appointments by clicking on the My Appointments link.

[Make another appointment](#) [Print for your records](#)

Patient:

Date:

Provider:

Location:

Phone number:

Type:

Instructions:

This is an Real Time 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.

[Back to Inbox](#) | [Accept](#) | [Reply](#) | [Recall Appt. Request](#) | [Remove](#) | [Print](#)

This appointment request is awaiting your response

Date practice responded: [View Details](#)
 Proposed appointment date: [View Details](#)
 Proposed provider: [View Details](#)
 Proposed location: [View Details](#)

Message from practice:
 Hi,

Original Appointment Request

Patient Name: [View Details](#)
 Date sent to practice: [View Details](#)
 Requested provider: [View Details](#)
 Requested category: [View Details](#)
 Requested location: [View Details](#)
 Appointment priority: [View Details](#)
 1st preferred: [View Details](#)
 2nd preferred: [View Details](#)
 Reason for appointment: [View Details](#)

- 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.

Welcome | Last logged in: 4/10/2017, 10:32 AM | Patient Education | [SEARCH](#)

[Back to Inbox](#) | [Accept](#) | [Reply](#) | [Recall Appt. Request](#) | [Remove](#) | [Print](#)

This appointment request is awaiting your response

Date practice responded: [View Details](#)
 Proposed appointment date: [View Details](#)
 Proposed provider: [View Details](#)
 Proposed location: [View Details](#)

Message from practice:
 Hi,

Original Appointment Request

Patient Name: [View Details](#)
 Date sent to practice: [View Details](#)
 Requested provider: [View Details](#)
 Requested category: [View Details](#)
 Requested location: [View Details](#)
 Appointment priority: [View Details](#)
 1st preferred: [View Details](#)
 2nd preferred: [View Details](#)
 Reason for appointment: [View Details](#)

- 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**.

Back | Remove | Print | Export to Calendar

This appointment is booked

Patient: [blurred]
 Date: [blurred]
 Provider: [blurred]
 Location: [blurred]

Phone number: [blurred]
 Type: [blurred]
 Instructions: [blurred]

I would like to:
[Cancel This Appointment](#)
[Reschedule This Appointment](#)

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

I would like to:
[Cancel This Appointment](#)
[Reschedule This Appointment](#)

Reason: **SUBMIT**

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**.

Back | Remove | Print | Export to Calendar

This appointment is booked

Patient: [blurred]
 Date: [blurred]
 Provider: [blurred]
 Location: [blurred]

Phone number: [blurred]
 Type: [blurred]
 Instructions: [blurred]

I would like to:
[Cancel This Appointment](#)
[Reschedule This Appointment](#)

- 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.

- 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.

- From Mail, click **Inbox**, and then open a pending appointment.
- Click **Remove**.

- 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

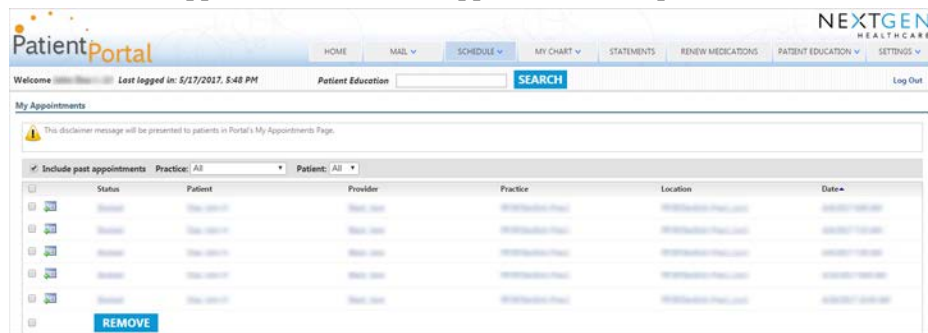
The My Appointments page displays a list of all the booked and canceled appointments. You access the My Appointments page from the Mail tab or by clicking **Upcoming Appointments** on the Home page. You can open and print, cancel, reschedule, or delete appointments.

Export an Appointment

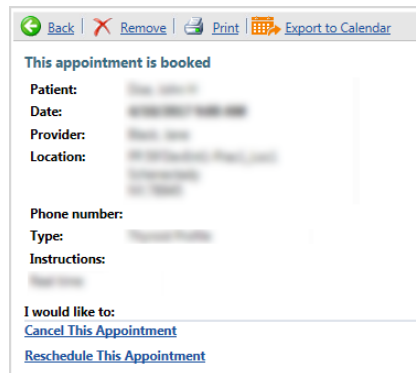
You can export booked appointments as .ics files and import them into any calendar or scheduling application that supports the .ics format. For example, Apple® Calendar or Microsoft® Outlook®. This helps you view your appointment details on any device that has a calendar application, without opening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

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

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



- 3 Click **Export to Calendar**.



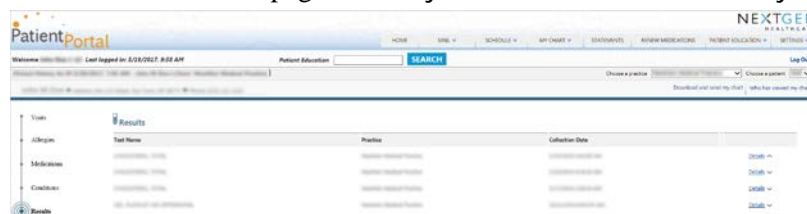
- 4 The appointment is saved as a .ics file. When prompted, you can open it directly or save it to your device.

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


- 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).
- 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).

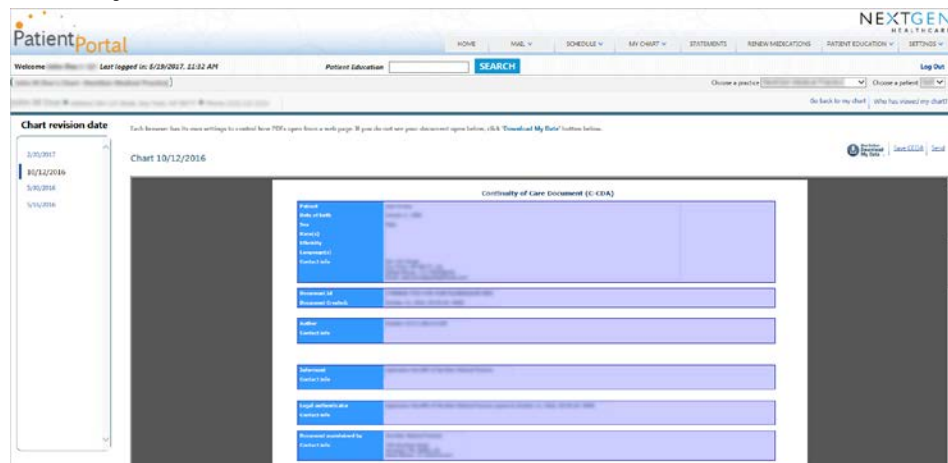
Save Your Personal Health Records

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.

- From My Chart, click **View My Chart**.
- Click **Download and send my chart**.
- From Chart revision date, select the visit date.
- Click **Download My Data** .

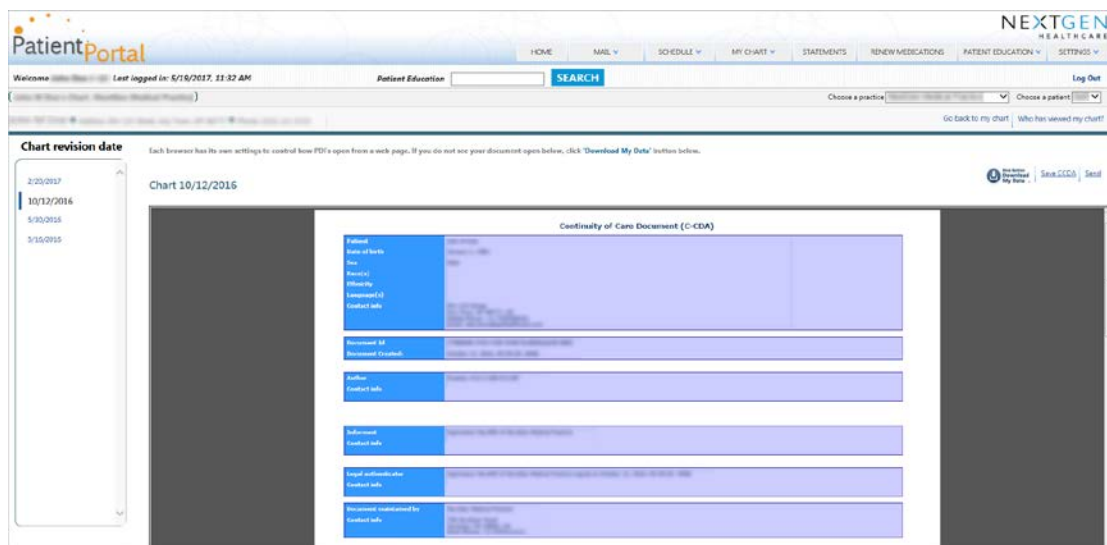


- 5 Click Save and select a folder location.
- 6 Click Save.

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.

Request Personal Health Record

1) Select Practice and Patient


Please select the medical practice and the person on which behalf the request will be sent to the practice.

*Practice:

2) Select Chart Date

Please select the chart range on which behalf the request will be sent to the practice.

* Chart Date:


This disclaimer message will be presented to users in Portal's Personal Health Record Module.

SUBMIT

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.

Provider/Organization	Specialty	Address	City	State	Zip	Phone
<input type="radio"/> Jackson Health	Orthopaedic Surgery	500 N. Main Street, Suite 100	Memphis	TN	38102-1000	(901) 525-1000
<input type="radio"/> Jackson Health	Internal Medicine	500 N. Main Street, Suite 100	Memphis	TN	38102	(901) 525-1000
<input checked="" type="radio"/> Jackson Health	Internal Medicine	500 N. Main Street, Suite 100	Memphis	TN	38102	(901) 525-1000
<input type="radio"/> Jackson Health	Internal Medicine	500 N. Main Street, Suite 100	Memphis	TN	38102	(901) 525-1000
<input type="radio"/> Jackson Health	Quality Management	500 N. Main Street, Suite 100	Memphis	TN	38102	(901) 525-1000
<input type="radio"/> Jackson Health	Internal Medicine	500 N. Main Street, Suite 100	Memphis	TN	38102	(901) 525-1000

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.

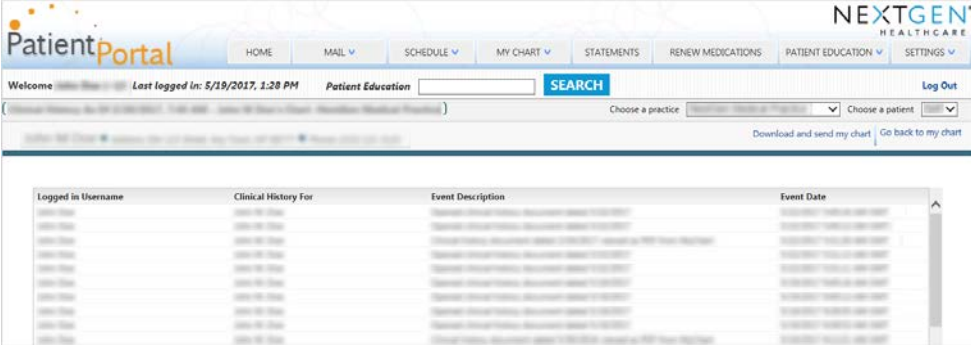
- 3 Click Send My Chart.

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.



The screenshot shows the NextGen Patient Portal interface. At the top, there's a navigation bar with links: HOME, MAIL, SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION, and SETTINGS. Below this is a welcome message and a 'Last logged in' timestamp. A search bar is also present. The main content area displays a table titled 'Who has viewed my chart' with the following columns: Logged in Username, Clinical History For, Event Description, and Event Date. The table contains several rows of data, each representing a login event.

Logged in Username	Clinical History For	Event Description	Event Date
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM
John Doe	John Doe	Viewed Patient History - Account opened 11/15/2017	11/15/2017 11:15:00 AM

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.

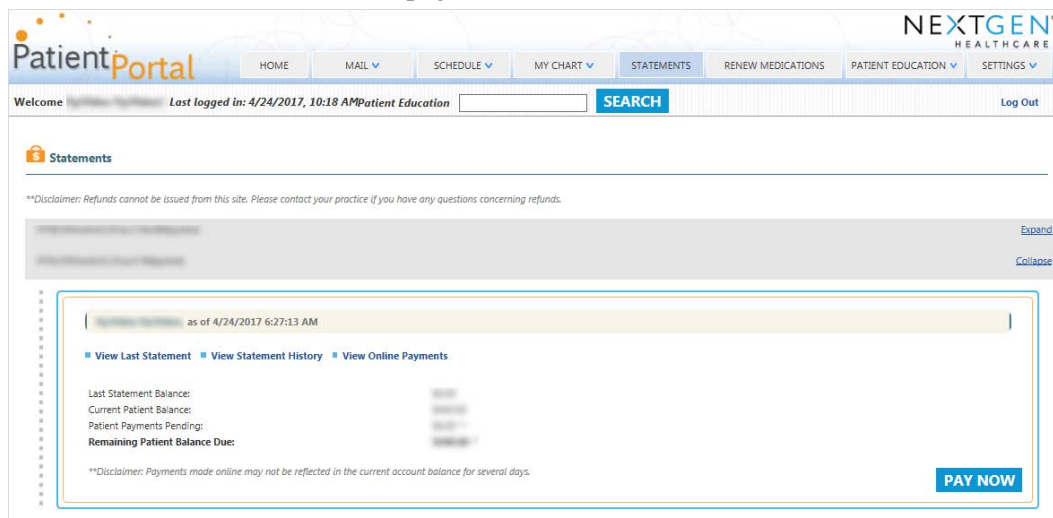
The Statements page displays your or your dependent balances, if any.

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**.



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11/03/2017

Patient Portal

HOME MAIL SCHEDULE MY CHART STATEMENTS RENEW MEDICATIONS PATIENT EDUCATION SETTINGS

Welcome [Name] Last logged in: 4/24/2017, 10:18 AM Patient Education SEARCH Log Out

Statements

**Disclaimer: Refunds cannot be issued from this site. Please contact your practice if you have any questions concerning refunds.

[Statement Summary]

as of 4/24/2017 6:27:13 AM

- View Last Statement
- View Statement History
- View Online Payments

Last Statement Balance:	\$0.00
Current Patient Balance:	\$0.00
Patient Payments Pending:	\$0.00
Remaining Patient Balance Due:	\$0.00

**Disclaimer: Payments made online may not be reflected in the current account balance for several days.

PAY NOW

2 Click View Statement History.

Statements

**Disclaimer: Refunds cannot be issued from this site. Please contact your practice if you have any questions concerning refunds.

Practice Name: [Dropdown] Patient Name: [Dropdown] Statement Date: [Select Statement Date] **VIEW STATEMENT**

[Statement Title] as of 4/24/2017 7:31:05 AM

[Return to Balances](#) [View Online Payments](#)

Last Statement Balance:	[Amount]
Current Patient Balance:	[Amount]
Patient Payments Pending:	[Amount]
Remaining Patient Balance Due:	[Amount]

**Disclaimer: Payments made online may not be reflected in the current account balance for several days.

PAY NOW

- 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.

Statements

**Disclaimer: Refunds cannot be issued from this site. Please contact your practice if you have any questions concerning refunds.

Practice Name: [Dropdown] Patient Name: [Dropdown] Statement Date: [Select Statement Date] **VIEW STATEMENT**

[Statement Title] as of 4/24/2017 6:27:13 AM

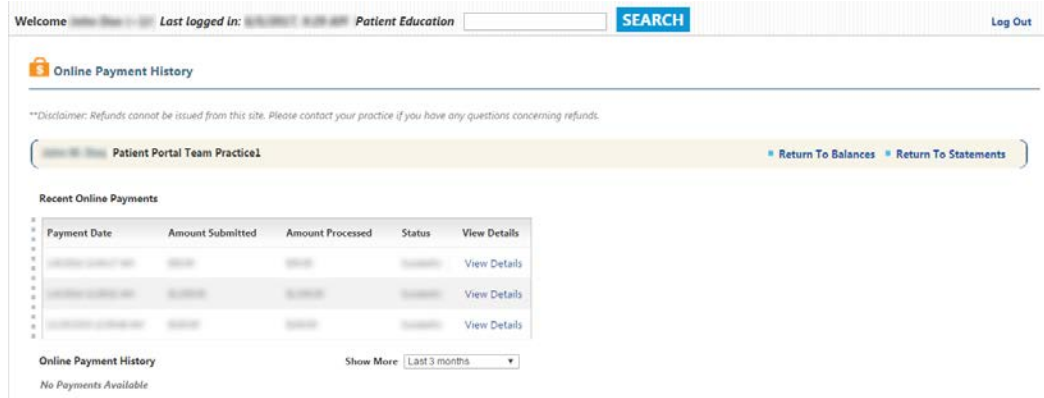
[View Last Statement](#) [View Statement History](#) [View Online Payments](#)

Last Statement Balance:	[Amount]
Current Patient Balance:	[Amount]
Patient Payments Pending:	[Amount]
Remaining Patient Balance Due:	[Amount]

**Disclaimer: Payments made online may not be reflected in the current account balance for several days.

PAY NOW

2 Click View Online Payments.



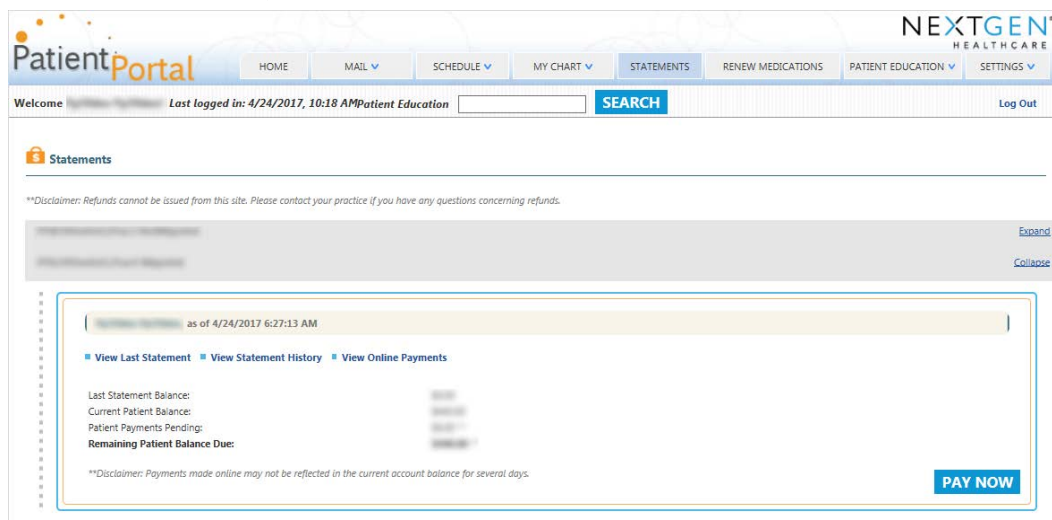
3 From the online details, view the following information:

- 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.

Make a Payment

Please select a payment method and then fill in all required information. The billing address selected must match the billing by NextGen Patient Portal. Asterisk (*) denotes required field.

***Payment amount:** ☐ Pay Total Due: USD \$228.00
☒ Pay Other Amount: USD \$
 All amounts in U.S. Dollars.

***Payment Type:**

***Cardholder's first name:**

***Cardholder's last name:**

Select a billing address:


***Address line 1:**

Address line 2:

***City:**

***State:**


***Zip:** -

 This is an electronic copy of your statement. A paper copy has also been mailed to you. If you pay this statement online, please disregard the paper copy.

SUBMIT

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

- 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



Card Number

Expiration Date

Submit **Cancel**

POWERED BY **InstaMed**

- 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.

The screenshot shows a form with the following fields and options:

- *Routing number: [text input box] [What is the routing number?](#)
- *Account number: [text input box]
- *Re-type account number: [text input box]
- *Bank account type: ☒ Checking ☐ Savings

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**.

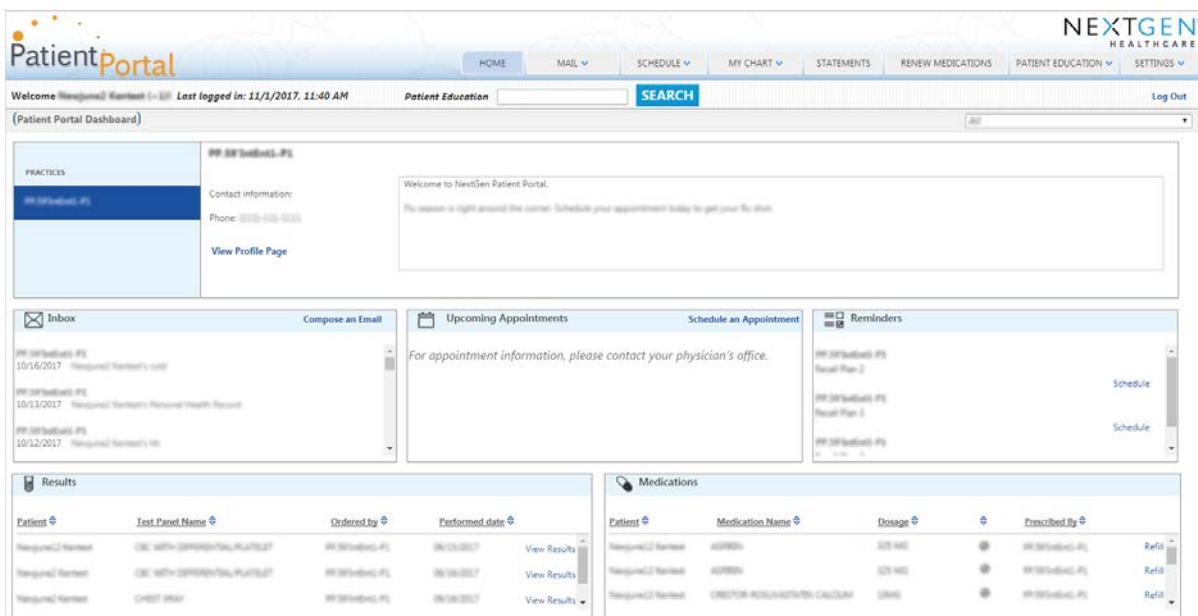
CHAPTER 8

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.

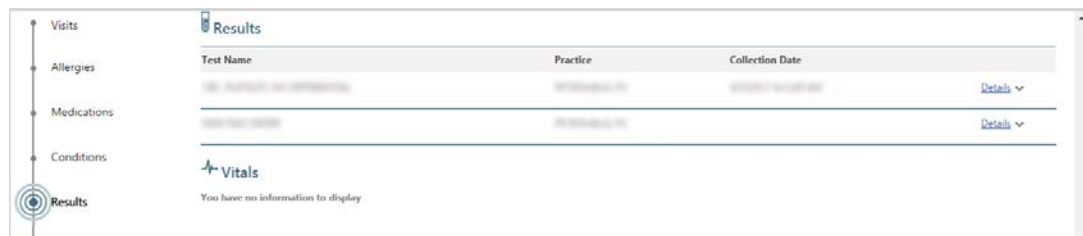
The following information appears in **Results: Not Available Within My Chart**:

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

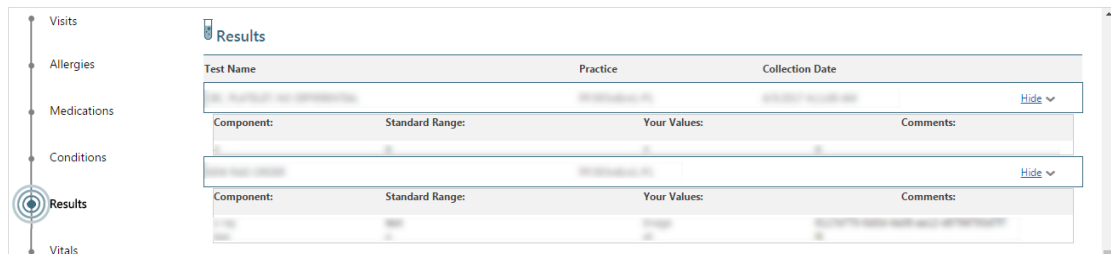
View Lab Results Details from My Chart

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**.

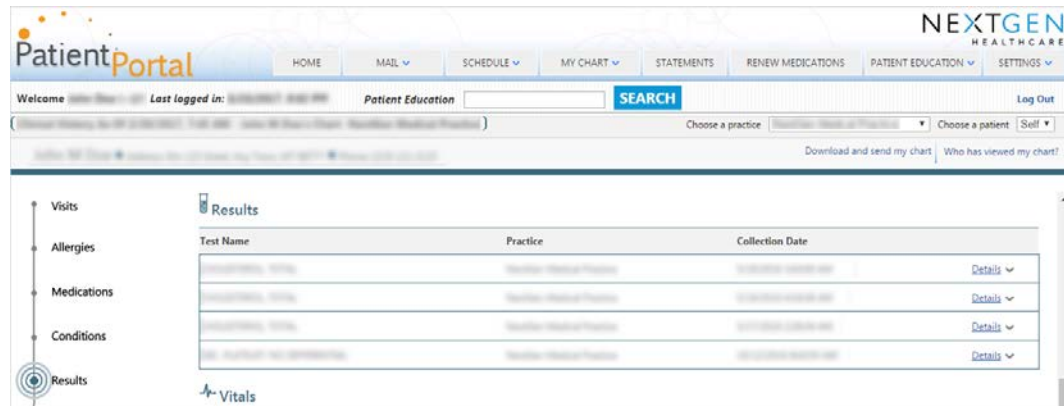


You can view your consolidated lab results details.

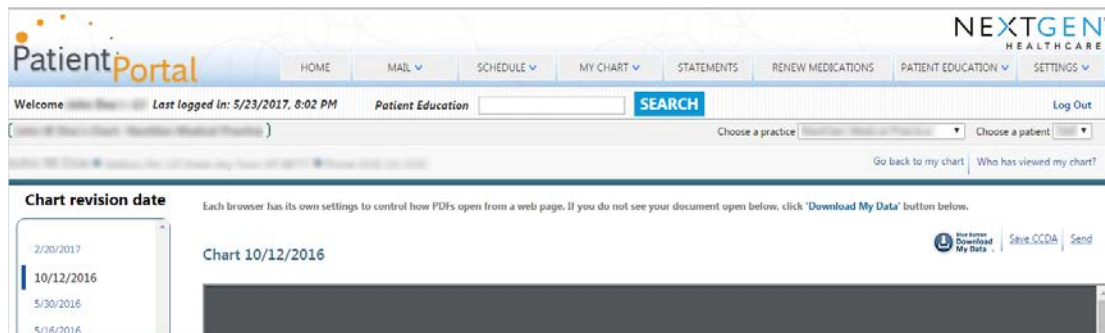
View Lab Results

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**.

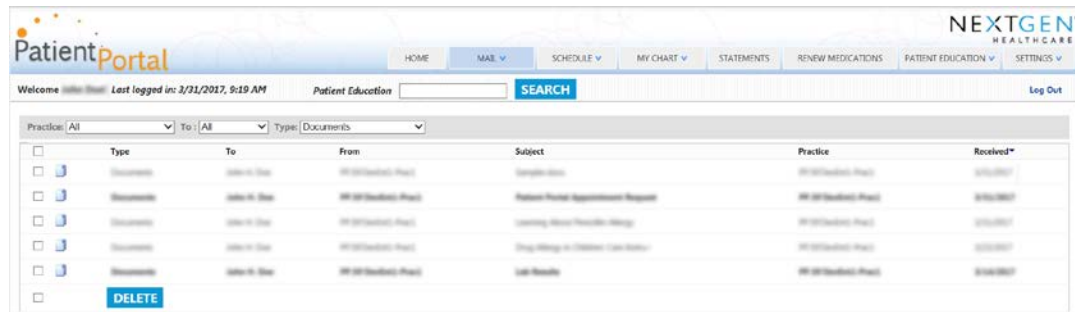


- 4 Click **Save** and select a location.
- 5 Click **Save**. Open the saved file and view the result in PDF.

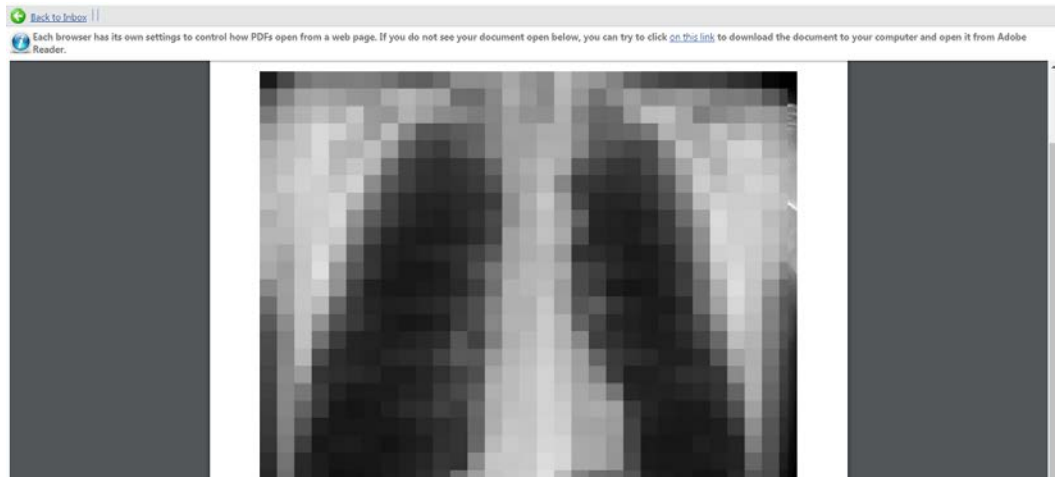
View Radiology Results

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.



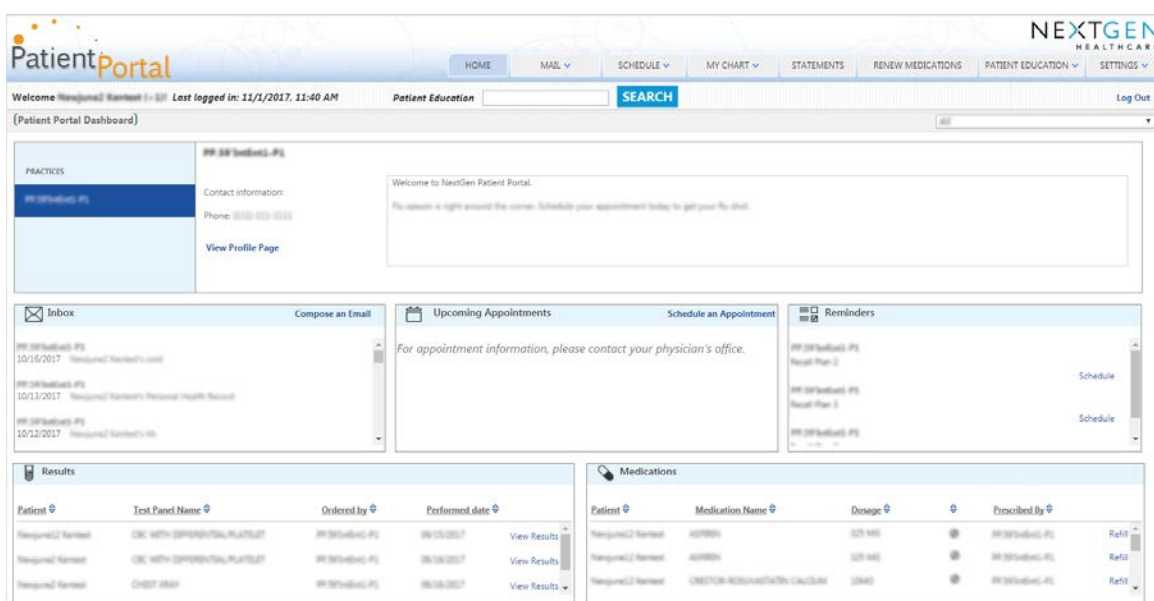
CHAPTER 9

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

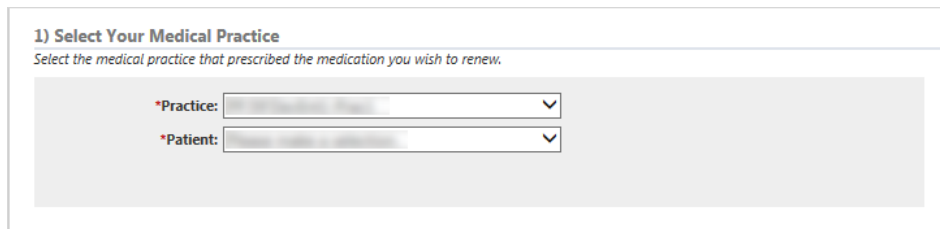
You can sort your prescribed medications in ascending or descending order by clicking a column header in the Medications section. Additionally, you can also click the arrow next to each column header to sort the information in the section.

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



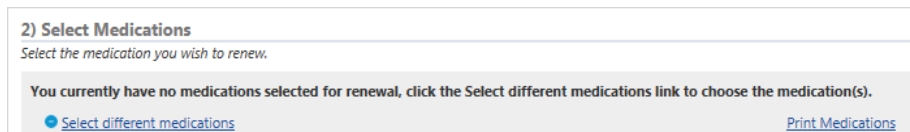
1) Select Your Medical Practice
Select the medical practice that prescribed the medication you wish to renew.

*Practice:

*Patient:

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.

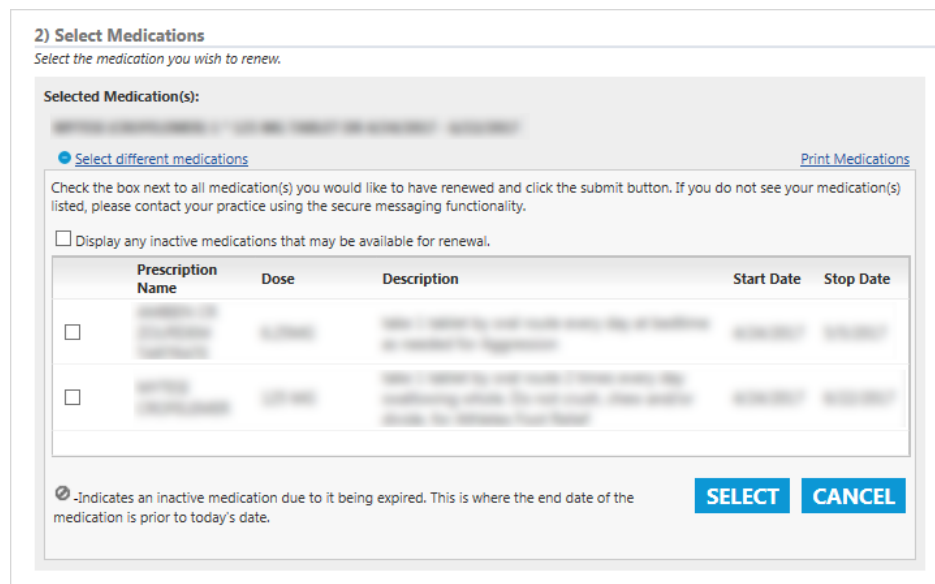


2) Select Medications
Select the medication you wish to renew.

You currently have no medications selected for renewal, click the [Select different medications](#) link to choose the medication(s).

[Select different medications](#) [Print Medications](#)

- 4 To select different medication, click **Select different medications**.



2) Select Medications
Select the medication you wish to renew.

Selected Medication(s):

[Select different medications](#) [Print Medications](#)

Check the box next to all medication(s) you would like to have renewed and click the submit button. If you do not see your medication(s) listed, please contact your practice using the secure messaging functionality.

☐ Display any inactive medications that may be available for renewal.

	Prescription Name	Dose	Description	Start Date	Stop Date
<input type="checkbox"/>
<input type="checkbox"/>

-Indicates an inactive medication due to it being expired. This is where the end date of the medication is prior to today's date.

SELECT **CANCEL**

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


2) Select Medications
Select the medication you wish to renew.


Selected Medication(s):

[Select different medications](#) [Print Medications](#)

Check the box next to all medication(s) you would like to have renewed and click the submit button. If you do not see your medication(s) listed, please contact your practice using the secure messaging functionality.

☒ Display any inactive medications that may be available for renewal.

	Prescription Name	Dose	Description	Start Date	Stop Date
<input type="checkbox"/>	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	11/15/2017	11/15/2017
<input type="checkbox"/> 	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	11/15/2017	11/15/2017
<input type="checkbox"/>	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	11/15/2017	11/15/2017

 -Indicates an inactive medication due to it being expired. This is where the end date of the medication is prior to today's date.

SELECT **CANCEL**

- 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**.

☐ **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.

3) Select Pharmacy
Select the pharmacy you wish to handle the refill.

Selected Pharmacy:

Pharmacy Name: **AMERICAN PHARMACY**

Address: **1234 MAIN ST**

Phone Number: **555-555-5555**

Fax Number: **555-555-5555**

[Select different pharmacy](#)

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

[Select different pharmacy](#)

Pharmacy search: **SEARCH** **ADD NEW**

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**.

Pharmacy search: **SEARCH** **ADD NEW**

If your preferred pharmacy is not displayed, please click on the Add New button to add your pharmacy.

- Indicates a pharmacy that can be modified

Search Results (4 record returned)

	Pharmacy Name	Address	Phone Number	
<input type="radio"/>	[Blurred]	[Blurred]	[Blurred]	
<input type="radio"/>	[Blurred]	[Blurred]	[Blurred]	
<input type="radio"/>	[Blurred]	[Blurred]	[Blurred]	
<input type="radio"/>	[Blurred]	[Blurred]	[Blurred]	

☐ Set as your NextGen Patient Portal preferred pharmacy **SELECT** **CANCEL**

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:

- Select the **Reason** for renewal.
- Select the **Provider** to whom you are sending the medication renewal.
- In **Comments** enter the reason for the prescription renewal.

4) Submit Renewal

Select Reason and Provider for this medication refill.

*Reason:

*Send to:

Comments:

Maximum length: 500 characters

*Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.

SUBMIT

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.

Pharmacy Name	Address	Phone Number
  Pharmacy Name	Address	Phone Number
 Pharmacy Name	Address	Phone Number
 Pharmacy Name	Address	Phone Number
 Pharmacy Name	Address	Phone Number
 Pharmacy Name	Address	Phone Number
 Pharmacy Name	Address	Phone Number

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

CHAPTER 10

Health Education Materials

You can get health 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>).

The screenshot shows the Patient Portal website. At the top, there's a navigation bar with links: HOME, MAIL, SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION (highlighted), and SETTINGS. Below the navigation bar, a welcome message says "Welcome [Name] Last logged in: 4/21/2017, 1:32 PM" and a "Log Out" link. The main content area features a search bar with the placeholder "Enter search term." and a "Search" button. Below the search bar, there's a section titled "Make better health decisions" with three interactive tool cards: "Interactive Tools", "Health Topics", and "Learning Centers". To the right of these cards is a "Check Your Symptoms" section with a "Start Now" button. Below the "Make better health decisions" section is a "Browse health information" section with a grid of links: Symptom Checker, Health Decision Tools, Topics A-Z, Medications, Medical Tests, and Spanish Knowledgebase. To the right of this grid is a "When you need to decide" section with buttons for Surgeries, Medical Tests, Medications, and Health Issues. At the bottom of the page, there's a disclaimer: "This information does not replace the advice of a doctor. Healthwise, Incorporated, 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 and Privacy Policy. Learn how we develop our content." and a copyright notice: "© 1995-2017 Healthwise, Incorporated. Healthwise, Healthwise for every health decision, and the Healthwise logo are trademarks of Healthwise, Incorporated."

Search for Health Education Topics

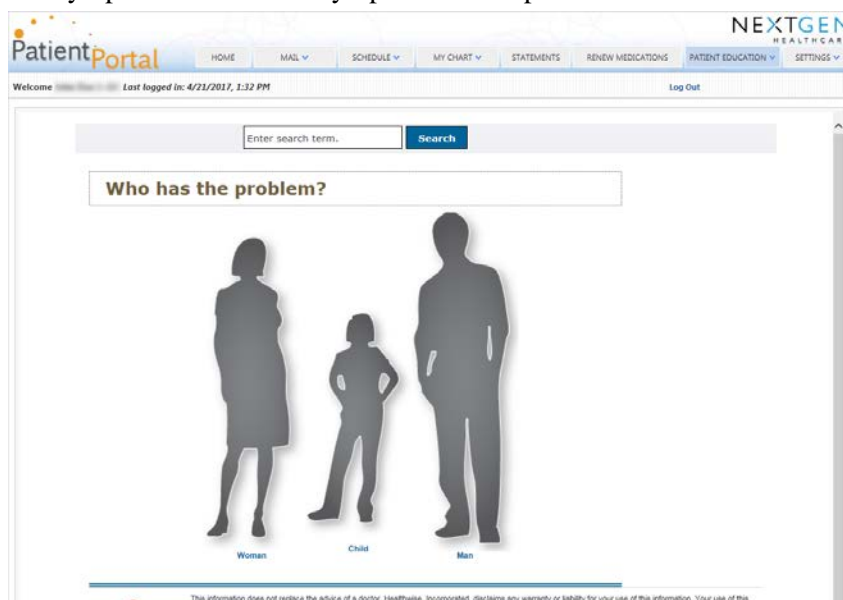
You can search for health educational topics that cover a variety of health topics.

- 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.

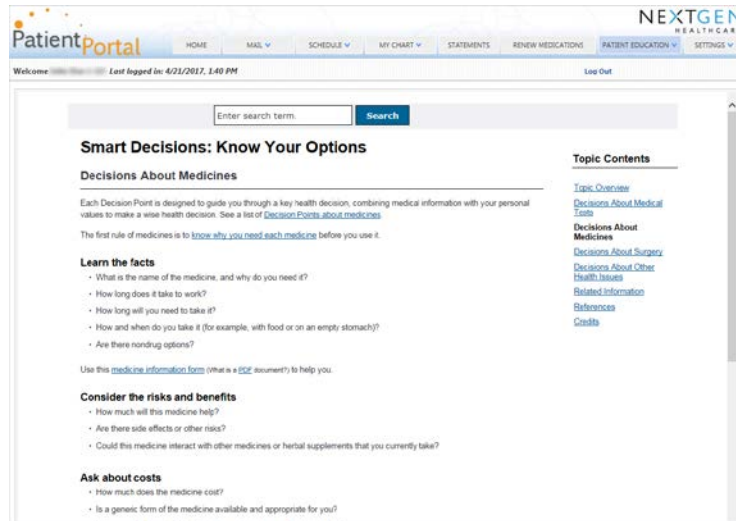
- 1 On the NextGen Patient Portal home page, click **Patient Education**, and then select **Symptom Checker**.
- 2 You can type the symptom and find the symptom related problems.



Read about Your Medication

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

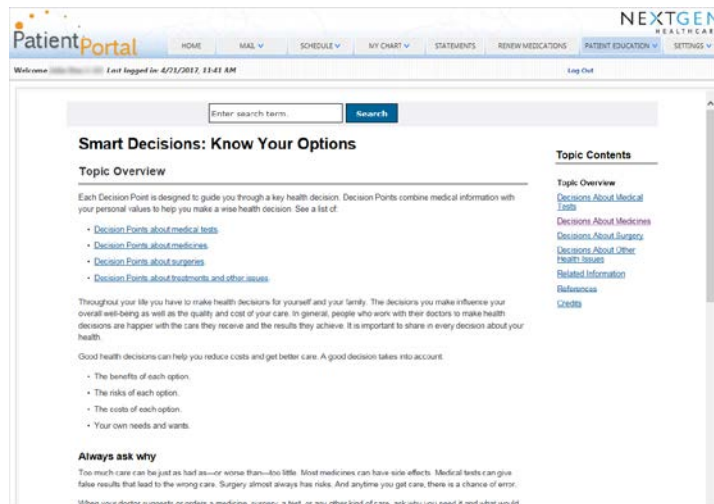
- 1 On the NextGen Patient Portal home page, click Patient Education, and then click Medications.
- 2 Type the medication search term, and then click Search.



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**.

Account Settings

Username Your Username	Edit
Password Your Password	Edit
Security Question To identify you as the account owner	Edit
Forgot Password Question To request a password reset	Edit
Un-enroll from Patient Portal Delete your Patient Portal account	Edit

- 2 Under Username, click **Edit**.

Username [Hide](#)

Your Username johndoe

Username must be between 6-50 characters which may be a combination of letters, numbers and [special characters](#) and is case sensitive.

* New username:

* Retype username:

For security reasons, please provide your current password to confirm your identity

* Current password:

SUBMIT

- 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**.

Account Settings	
Username	Edit
Your Username	
Password	Edit
Your Password	
Security Question	Edit
To identify you as the account owner	
Forgot Password Question	Edit
To request a password reset	
Un-enroll from Patient Portal	Edit
Delete your Patient Portal account	

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

Your Password *****

Password must be between 8-50 characters with no spaces, must include at least one numeric digit, is case sensitive, and can be combination of letters and [special characters](#).

* New password:

* Retype password:

For security reasons, please provide your current password to confirm your identity

* Current password:

SUBMIT

- 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**.

Account Settings

Username Your Username	Edit
Password Your Password	Edit
Security Question To identify you as the account owner	Edit
Forgot Password Question To request a password reset	Edit
Un-enroll from Patient Portal Delete your Patient Portal account	Edit

- 2 Under **Security Question**, click **Edit**.

Security Question [Hide](#)

To identify you as the account owner

What is your mothers maiden name?

Current question: What is your mothers maiden name?

* New question:

* New answer:

* Retype answer:

For security reasons, please provide your current password to confirm your identity.

* Current password:

SUBMIT

- 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**.

Account Settings

<u>Username</u>	Edit
Your Username	
<u>Password</u>	Edit
Your Password	
<u>Security Question</u>	Edit
To identify you as the account owner	
<u>Forgot Password Question</u>	Edit
To request a password reset	
<u>Un-enroll from Patient Portal</u>	Edit
Delete your Patient Portal account	

- 2 From **Forgot Password Question**, click **Edit**.

Forgot Password Question [Hide](#)

To request a password reset color?

Current Question: color?

* New question:

* Retype question:

* New answer:

* Retype answer:

For security reasons, please provide your current password to confirm your identity.

* Current password:

SUBMIT

- 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**.

Account Settings

Username [Edit](#)
Your Username

Password [Edit](#)
Your Password

Security Question [Edit](#)
To identify you as the account owner

Forgot Password Question [Edit](#)
To request a password reset

Un-enroll from Patient Portal [Edit](#)
Delete your Patient Portal account

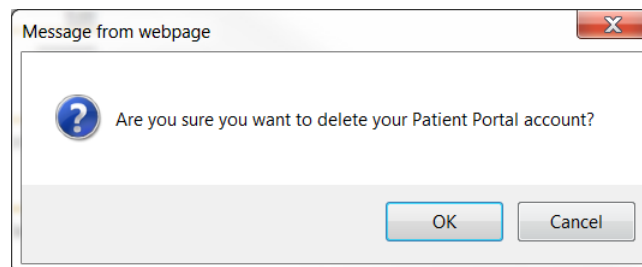
- 2 From **Un-enroll from Patient Portal**, click **Edit**.
- 3 From **Reason**, select a reason for un-enrolling from NextGen Patient Portal.
- 4 Click the **Un-enroll** button.

Un-enroll from Patient Portal [Hide](#)

Delete your Patient Portal account

Reason: Not satisfied [v](#) **UN-ENROLL**

- 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.

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

My Information

This data is view only, with exception of Preferred Notification Methods. If you see any changes that are needed, please contact one of your practices.

NextGen Medical Enterprise
My Practices: [View My Practices](#) [Collapse](#)

Disclaimer

This is a message to those in the system.

Name **Phone Number(s)**

Date of Birth

Address(es)

Preferred Notification Method

Email	Receive Emails	Format
<input type="text"/>	Yes	HTML Change Method
Mobile Phone	Receive Text Messages	Carrier
<input type="text"/>	No	None Expand

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

Address(es)

Preferred Notification Method

Email	Receive Emails	Format
<input type="text"/>	Yes	HTML Hide

*** E-mail address:**

☒ **Receive notifications at this e-mail address**

*** Format:**

UPDATE

Mobile Phone **Receive Text Messages** **Carrier**

[Expand](#)

- 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.

The screenshot shows a form for updating notification preferences. On the left, there is a field for 'Address(es)' with a blurred value. The main section is titled 'Preferred Notification Method' and contains two rows of settings:

	Receive Emails	Format
Email	Yes	HTML Change Method
Mobile Phone	No	Carrier Collapse

Below this table is a section for mobile phone settings:

- Type:** Mobile
- * Phone number:** [Text input field]
- ☒ **Receive text message notifications at this mobile number**
- * Select Provider:** [Dropdown menu showing 'Please select a mobile carrier']
- UPDATE** button

- 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.

Module	View	Send/Complete
IMH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Messages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Personal Health Record	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Manage User Grants

Who Manages My Account?

No one else is managing your account.

Accounts I Manage

Practice: [Select Practice From Practice]

Expiration Date:

Full Access: ☐

Module	View	Send/Complete
Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>
IMH	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Templates	<input type="checkbox"/>	<input type="checkbox"/>
Personal Health Record	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

DELETE

- 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.

Manage your practices

You are currently enrolled in the following practices :

[Practice Name] [Un-enroll me from this practice](#)

You have pending enrollment records from the following practices :

[Practice Name] [Hide](#)

After activating this practice you will be able to communicate with this practice. Please click on Complete Enrollment button to add this practice to your account.

COMPLETE ENROLLMENT **DECLINE PENDING ENROLLMENT**

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.

Manage your practices

You are currently enrolled in the following practices :

[Practice Name] [Un-enroll me from this practice](#)

You have pending enrollment records from the following practices :

[Practice Name] [Add this practice to my account](#)

Enroll in an additional practice:

Please enter your security token, date of birth and your email address. Once security token, date of birth and email address have been validated, you will be able to create your Patient Portal account. Asterisk (*) denotes required field.

*Enter security token: [What is security token?](#)

* Enter date of birth:

*Enter email address:

☐ I do not have an email address

SUBMIT

- 2 Enter the token number, and your date of birth.
- 3 Enter your email address in **Email Address**.

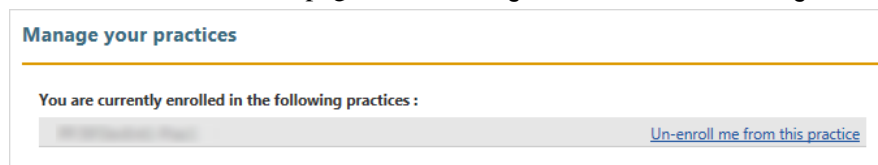
Note: If you do not have an email address click **I do not have an email address**, and then enter your last name.

- 4 Click **Submit**.
A confirmation message appears.
- 5 Click **OK** to continue.

Un-enroll from the NextGen Patient Portal

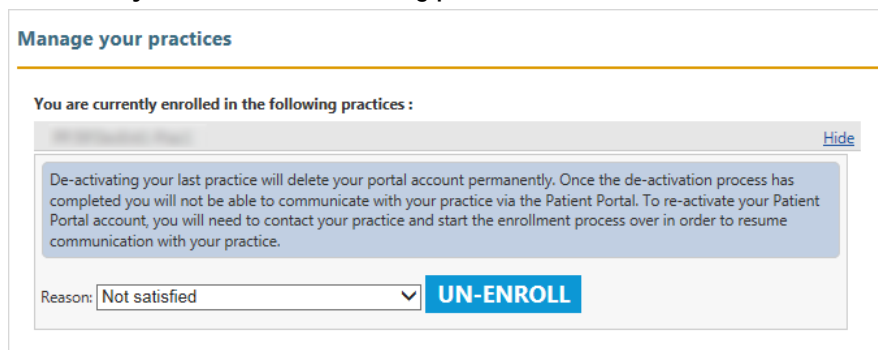
You can un-enroll from the NextGen Patient Portal at any time.

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



The screenshot shows a web interface titled "Manage your practices". Below the title, it says "You are currently enrolled in the following practices :". There is a table with one row containing a practice name and a link "Un-enroll me from this practice".

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



The screenshot shows the "Manage your practices" section with the "Un-enroll me from this practice" link clicked. A modal box appears with the text: "De-activating your last practice will delete your portal account permanently. Once the de-activation process has completed you will not be able to communicate with your practice via the Patient Portal. To re-activate your Patient Portal account, you will need to contact your practice and start the enrollment process over in order to resume communication with your practice." Below this text is a "Reason:" dropdown menu with "Not satisfied" selected, and a blue "UN-ENROLL" button.

- 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**.

Go Paperless!

You can choose to receive your statements online. By checking the option(s) below you can elect to receive an electronic version of your statement from your practice. Leave the option(s) below unchecked if you wish to receive both electronic and paper statements.

Practice Name	Receive only electronic statements <input checked="" type="checkbox"/>
My Practice	<input checked="" type="checkbox"/>
My Practice	<input checked="" type="checkbox"/>
My Practice	<input checked="" type="checkbox"/>

SUBMIT

- 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

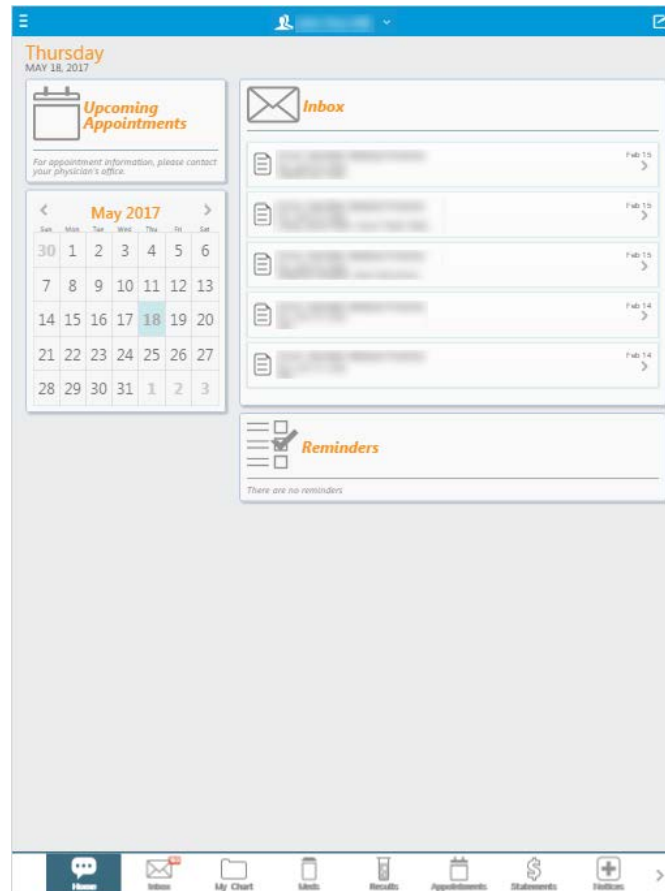
The NextGen Patient Portal mobile website is accessible, if you are enrolled in the NextGen Patient Portal.

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.

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