NextGen Patient Portal

User Guide



Copyright © 2014-2017 QSI Management, LLC. All Rights Reserved.

The registered trademarks listed at <u>http://www.qsii.com/legal_notices.shtml</u> are the registered trademarks of QSI Management, LLC. Microsoft, SQL Server, Windows, and Windows Server are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Mozilla and Fire fox are registered trademarks of the Mozilla Foundation. CCHIT is a registered trademark of the Certification Commission for Health Information Technology. Adobe and Acrobat are either registered trademarks of Adobe Systems Incorporated in the United States and/or other countries. Apple and Safari are registered trademarks of Apple Inc. All other names and marks are the property of their respective owners.

Notice:

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

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

When required, procedures and screen shots in this guide were primarily developed using Microsoft Windows[®] 7, Windows Server[®] 2008, and SQL Server[®] 2008. In some cases, later versions of Microsoft Windows, Windows Server, and SQL Server were used. Although a Microsoft trademark may appear in certain images within this document, Microsoft Corporation is not responsible for warranty support on the NextGen software products. Note: Other Windows operating systems that support this product may work differently.

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

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

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

App Version	Date	Document Version	Summary of Changes
2.4.1	11/03/2017	14.0	Initial Release for 2.4.1
2.4	09/18/2017	13.0	General Release for 2.4
2.4	06/15/2017	12.0	Initial Release for 2.4
2.3	10/24/2016	11.0	General Release of 2.3
2.3	12/14/2015	10.0	Initial Release of 2.3
2.2.4	03/24/2016	9.0	Added a section for Results: Not Available Within My Chart feature
2.22	11/23/2015	8.0	Updated references to Password character requirements throughout the document
2.2.	06/26/2015	7.0	General Release of 2.2
2.1.1	01/30/2015	6.0	General Release
2.1	11/13/2014	5.0	General Release
2.0	07/10/2014	4.0	Updated the "Sending the PHR" section
2.0	07/03/2014	3.0	Updated the "Saving Personal Health Records" section
2.0	06/30/2014	2.0	General Release
2.0	06/27/2014	1.0	Initial Release

Document Revision History

Contents

Chapter 1 Features of NextGen Patient Portal	7
Web Browser Requirements	7
Internet Security Considerations for NextGen Patient Portal	
Email Notifications	8
Chapter 2 Enroll in NextGen Patient Portal	9
Enroll in NextGen Patient Portal with a Token	9
Enroll in NextGen Patient Portal with Temporary Username and Password	
Enroll in NextGen Patient Portal by Yourself	
Chapter 3 NextGen Patient Portal Web Account Access	18
Change NextGen Patient Portal Language	
Log On to your NextGen Patient Portal Account	
Log Off from NextGen Patient Portal Account	
NextGen Patient Portal Session Time Out	
Locked Accounts	
Change the User	
Recovering Log On Details	
Recover your NextGen Patient Portal User Name	
Reset your NextGen Patient Portal Password	
Reset Your Password with a Reset Token	
Reset your Password without Using Log On Credentials	27
Chapter 4 Your Mail	29
View Your Messages	
View Your Appointments from Inbox	
View Attached Documents	
Access Statements from Inbox	
View Medications	
View Messages	
Reply to Messages	
Submit a Form	
Submit an Interactive Medical Form	
View Personal Health Records (PHR)	
Delete Inbox Items	
Print Inbox Items	
Send Messages	40
View Sent Items	41

Chapter 5 Your Appointments	42
Chapter 5 Your Appointments Request Appointments	
Create an Appointment Request	
Submit the Request	
Book an Appointment Online	
Accept a Pending Appointment Request	
Reply to a Pending Appointment Request	
Cancel an Appointment Request	
Reschedule a Booked Appointment	
Cancel a Booked Appointment	
Delete a Pending Appointment Request	
Viewing Appointments	
Export an Appointment	
Chapter 6 Your Personal Health Records Save Your Personal Health Records	51
Download Personal Health Records as PDFs	
Download PHRs as C-CDA (XML) Documents	
Request Your Personal Health Record	
Send Your PHR	54
Search for a Provider and Send Your PHR to the Provider	
Send Your PHR to a DIRECT Address	
Send Your PHR Using an e-mail Address	
See Who Viewed Your Chart	
Chapter 7 Your Statements	59
View Statements	
View your Last Statement	
View your Statement History	
View your Online Payments	61
Make Payments	
Chapter 8 Your Lab Results	65
Viewing Lab Results on the Home Page	
Sorting Lab Results in the Results Section	
Lab Results Not Available Within My Chart	
View Lab Results Details from My Chart	
View Lab Results	
View Radiology Results	
Chapter 9 Your Medications	69
Viewing Medications on the Home Page	
Sorting Medications in the Medications Section	
Renew Medications	
Add a New Pharmacy	

Chapter 10 Health Education Materials	74
Search for Health Education Topics	75
Use the Symptom Checker	75
Read about Your Medication	76
Health Decision Tools	76
Chapter 11 Settings	77
Account Settings	77
Change your Username	77
Change your Password	78
Change your Security Question	79
Change your Forgotten Password Question	80
Cancel your NextGen Patient Portal Enrollment	
My Information	
User Grants	83
Manage Care Manager Grants	84
Manage Dependent Accounts	
Manage Practices	86
Enroll to Practices in the same Enterprise	86
Confirm Pending Enrollment Requests	86
Enroll in another Practice	
Un-enroll from the NextGen Patient Portal	88
Manage Statement Notifications	89
Chapter 12 Troubleshooting	90
Locked Accounts	
View Dependent Accounts	
Recover My NextGen Patient Portal User Name	
Recover My NextGen Patient Portal Password	
Reset My Password with a Reset Token	
Recover My NextGen Patient Portal Account	92
Chapter 13 NextGen Patient Portal Mobile	93
Supported Devices	93
Supported Browsers	93
System Requirements	93
Access NextGen Patient Portal Mobile	94
NextGen Patient Portal Mobile Home Page	94
Navigate NextGen Patient Portal Mobile	95
Index	96

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
- Solution So
- > 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 <u>PatientPortal-noreply@Nextgen.com</u> 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 <u>PatientPortal-noreply@Nextgen.com</u>.

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?	I am new here
Please note that the username and password fields are case sensitive and the password must contain at least one number.	
	 Have you been provided an enrollment
Username Username	token?
Password: Password	 Do you have a temporary username and password?
Need help with your username and password?	password:
LOG IN	I AM NEW HERE

2 Click I Am New Here.

3 Read the terms and conditions, and then click | Accept.



4 Click I was given an enrollment token.

This is yo	ur first step to the enrollment process.
Please se	lect the option that applies to you and provide the required information.
💽 I was g	iven an enrollment token
	* Freedland Address
	* Enrollment token:
	What is security token?
	* Date of birth (mm/dd/yyyy):
	* Email address:
	I do not have an email address
○ I have	a temporary username and password
	NEXT CANCEL
Â	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 subje

- **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 <u>special</u> <u>characters</u> 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 <u>special</u> <u>characters</u> .
* 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	
	his question will be used as part of the login authorization ir selected question when you try to login to your account.
* 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.

ou will be	orgotten password question and enter the answer. This question will be used in the password reset proc e prompted to enter the answer for this question in case you need to reset your password in the future.) denotes required field. * Create a question:
	* Enter your answer:
	* Retype your answer:
Â	FRAUD WARNING
	Any person who knowingly with the intent to defraud any medical agency by concealing and filing fal information for medical care or treatment may be found to have committed a fraudulent act which is crime and may be subject to criminal and civil penalties.

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.

Already a member?	I am new here
Please note that the username and password fields are case sensitive and the password must contain at least one number.	
	 Have you been provided an enrollment
Username	token?
Password:	
Password	 Do you have a temporary username and
Need help with your username and password?	password?
LOG IN	I AM NEW HERE

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



4 Click I have a temporary username and password.

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

This is your first	ep to the enrollment process.	
Please select the	otion that applies to you and provide the required information.	
O I was given an	ollment token	
I have a tempo	/ username and password	
	* Username:	
	Optimite.	
	* Password:	
	NEXT CANCEL	
FRAU	WARNING	
Anum	n who knowingly with the intent to defraud any medical agency by concealing and filing false inform	atio

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

FRAUD WARNING	
and filing false information for m	the intent to defraud any medical agency by concealing nedical care or treatment may be found to have committ 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 credentio	als
Create your username	
-	n vou login. Asterisk (*) denotes required field.
* Username	
	Username must be between 6 and 50 characters which may be a combination of letters, numbers and <u>special</u> <u>characters</u> and is case sensitive.

- **8** Under Create your password, do the following:
 - a) Type a password.
 - b) Re-type the password to confirm it.

nter 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 <u>special</u> <u>characters</u> .
* 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 w process. You will be prompted to enter the answer for your selected que 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.

ICHSK (denotes required field. Create a question:	
	* Enter your answer:	
	* Retype your answer:	
Â	FRAUD WARNING	
	Any person who knowingly with the intent to defraud any medical agency by concealing and filing i information for medical care or treatment may be found to have committed a fraudulent act which crime and may be subject to criminal and civil penalties.	

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.

YOUR PRACTICE & INFORMATION			
ave a Patient Portal Account			
* Username	* Password		
Username	Password	LOGIN	

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.

Don't Have an Account? Simply Fill Out the Fields Below
1)Select Your Medical Practice
Practice:
2) Enter your information
* First Name: *Last Name: *Last Name:
* Address:
Address 2:
Address 3:
City: *ZIP/Postal Code: Country: *State: United States
Phone number (123-456-7890) Phone Extension:
* Date of Birth (mm/dd/yyyy)
MM/DD/YYYY
* Email Address: Confirm Email Address:
BACK NEXT CANCEL

- **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		
1) Enter Your Health Insurance Inforr	nation (Optional)		
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:			
United States Phone number:			
	ВАСК	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.

			ENROLLMENT CREDENTIALS	SCHEDULE APPOINTMENT
	FRAUD WARNING			
		ith the intent to defraud any medi- hich is a crime and may be subject		for medical care or treatment may be found to have
1) Cre	ate Username and Passw	ord		
Create	a username and password you i	vant to use when you log in. Aster	isk (*) denotes required field.	
		* Username:		
			sust be between 6-50 characters which may	
			ation of letters, numbers and <u>special</u> nd is case sensitive.	
		* Password:		
		Password m	ust be between 8-50 characters with no	
			t include at least one numeric digit, is case d can be a combination of letters and <u>special</u>	
		characters.		
	30	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 o enter the answer for your selected question when you try t	s question will be used as part of the login authorization process. You will be prompted 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	Recoverv	Credentials
b) cicate	1 4334014	Recovery	CICACITCIAIS

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.

ľ	lessage 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 logon.

Patientportal	NEXTGEN"
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.	

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

User Guide | Site Map | Get Acrobat Reader | Privacy Policy | Having Trouble? English 🗸

> 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.

atientport	al	HE HE	TGEN
Welcome to Patient Portal,		fortal, you can connect with your doctor through a convenient, safe ronment.	English V e, and secure
Alre	ady a member?	I om new here	
sensit Us U Par	enante that the username and parsword fields are case use and the parsword must contain at least one number. enanne sevend: 	 Have you been provided an enrollment token? Do you have a temporary username and password? 	
		ining email notifications secure your personal information. Please view our <u>Privacy Policy</u> for more i	information

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



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

receive an electronic ver	e your statements online. By checking the option(s) below you can elect to ion of your statement from your practice. Leave the option(s) below unchecked if electronic and paper statements.
Practice Name	Receive only electronic statements 🗹
Ppnandev1 Ppnandev1	
INVSIDard rel Proc 2	$\mathbf{\nabla}$
GO	PAPERLESS DECIDE LATER

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

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

Patientpo	ortal		нем	um v	SCHEDULE V	MY CHART w	STATEMENT	BENEW ME	IDICATIONS	PATIENT EDUCATION	SETTINGS
		11:40 AM	Patient Education		SEARCH						Leg Di
(Patient Portal Dashbo	sard)								80		
PEACTICIS PETTERINGUEL PL	PP 38 Settlers P; Contact information Phone View Prefile Page		Watcome to Neutlien Par		ne estimati intel	n get yner Te dres					
Inbox		Compose an Email		ggchitments njormation, plea	se contact your phy:	thedule as Appointment sician's office.	PERCENT AND IN COLUMN				
	eneris des estate des et	- 1					Real Parts Real Parts	1.01			Schedule
10/12/2017	arrespond to the						PERMIN	111			
Results					Medications						
Extient ©	Test Panel Name	Ordered by \$	Performed data	e	Estient \$	Medication Name		Doosge ©	٥	Preseribed By C	
Respond Series	CRC MEN-COMMENTIAL PLACES	Without PL	8/3.057	View Roudes	Nerganal2 factors	ALTER:		327.045		PETRONIC PL	Refit
Nangaral Second	(a) who compression, musical	10.00 Aug. 21	10110-0027	View Results	Respond Street	401000		25.940		10 (d) (d) (d) (d)	Refit
Inspect formet	C-B27 share	10.011abro 41	101007	View Results +	Respond2 formed	CHECTOR ADDURATED	NOLDA	1040		$H^{1}(\mathbb{R}) \otimes [\infty], \mathcal{X})$	Reful

- > 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.

PatientPortal	HOME	MAIL V	SCHEDULE 🗸	MY CHART V	STATEMENTS	RENEW MEDICATIONS	 SETTINGS V
Welcome and Des 1-13 Last logged	in: 4/20/2017. 10	:58 AM Patient	Education		SEARCH		Log Out

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.

atientportal	HEALTH
elcome to Patient Portal, your medical home on the Web. With Patient Por environ () Account will be locked for 20 minutes after 4 failed login attemp	
Already a member?	I am new here
Present note that the username and parsured fields are care sensible and the possword must contain at least one number. The codentials entered are invalid. Prease temember that username and password are case sensitive. Please try again. Username Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Parsword: Pars	 Have you been provided an enrollment token? Do you have a temporary username and password? 1 AM NEW HERE
	ng email notifications sure your personal information. Please view our <u>Privacy Policy</u> for more informati
rear evening is improving the use, its into up to the pp, sategoard, and see	and your personal meaningers, reary delification <u>transprotection</u> for more more manager

Your account will be automatically unlocked only after 20 minutes.

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

Change the User

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

Recovering Log On Details

You can reset your password using:

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

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

Recover your NextGen Patient Portal User Name

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

	naving problems signing in. got my Username
OI for	got my Password
OI hav	re my password reset token
OI do	not remember any of my login credentials
	SUBMIT CANCEL
	FRAUD WARNING

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

"m h	aving problems signing in.
I for	got my Username
Please	enter your information below so that we can locate your account.
	* Last Name:
	* Email address:
* Dat	e of Birth (mm/dd/yyyy):
OI hav	jot my Password e my password reset token not remember any of my login credentials
0100	not remember any or my login crebentials
	SUBMIT CANCEL
4	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 crin

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.

	<i>having problems signing in.</i> ^{rgot my Username}
OI fo	rgot my Password
OI ha	ave my password reset token
OI do	o not remember any of my login credentials
	SUBMIT CANCEL
	FRAUD WARNING

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



5 Click Submit.

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

leset	your credentials
	t your credentials, answer your forgotten password security question. An email will be sent containing a URL ; reset your password. The forgotten password security answer is not case sensitive.
you to	reset your passwora. The lorgottern passwora security answer is not case sensitive.
	SUBMIT CANCEL
<u> </u>	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

- 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

	Any person who knowingly with the intent to defraud any medical agency by concealing and filing fails 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: bur password
	our password
Enter a pa	
	ssword 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 yo	pur login security authorization
	login security question and enter your answer. This question will be used as part of the login authorization
	ou will be prompted to enter the answer for your selected question when you try to login to your accou) denotes required field.
	* Select a question: Please choose a security question.
	* Enter your answer:
	* Retype your answer:
Reset vo	our password recovery credentials
Create a fo	proteen password question and enter the answer. This question will be used in the password reset proc
	e 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:

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



- **10** Click **OK** to continue. The Login page appears.
- **11** Log on using your username and the new password.

Reset Your Password with a Reset Token

- **1** Go to the NextGen Patient Portal website logon page.
- 2 Click Need help with your username and password, and then select I have my password reset token.

	t my Username
OI forgo	t my Password
○I have I	my password reset token
OI do no	t remember any of my login credentials
	SUBMIT CANCEL
<u> </u>	AUD WARNING

3 Enter the requested information.

Forgot y	your Login information?
	aving problems signing in. ot my Username
OI forg	ot my Password
💽 I have	my password reset token
should	enter your information below so that we can locate your account. Your password reset token have been provided by your practice. * Reset token: * Email address: of Birth (mm/dd/yyyy):
OI do n	ot remember any of my login credentials
	SUBMIT CANCEL
Α	RAUD WARNING my person who knowingly with the intent to defraud any medical agency by concealing and filing false directions for executing are not proteined areas to force and to have committed a forcedures are tabled in a crime
	formation for medical care or treatment may be found to have committed a fraudulent act which is a crime nd may be subject to criminal and civil penalties.

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

	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 yo	our password
Enter a pas	ssword 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 <u>special</u> <u>characters</u> .
	* Retype password:
	our login security authorization
process. Yo	ogin security question and enter your answer. This question will be used as part of the login authorization to will be promoted to enter the answer for your selected question when you try to login to your accound denotes required field.
	* Select a question: Please choose a security question.
	* Enter your answer:
	* Retype your answer:
	- Ketype your answer:
Reset vo	our password recovery credentials
You will be	orgotten password question and enter the answer. This question will be used in the password reset proce prompted to enter the answer for this question in case you need to reset your password in the future.) denotes required field.
	* Create a question:
	* Enter your answer:
	* Retype your answer:

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.

	naving problems signing in. got my Username
OI for	got my Password
OI hav	re my password reset token
O <mark>I do</mark>	not remember any of my login credentials
	SUBMIT CANCEL
Â	FRAUD WARNING

- 2 Click I do not remember any of my login credentials.
- **3** Enter the requested information.

2	my Username
I forgot	my Password
I have m	ny password reset token
I do not	remember any of my login credentials
Please en	ter your information below so that we can locate your account.
	* First Name:
	* Last Name:
	* Email address:
* Date of	Birth (mm/dd/yyyy):
	* Zip/Postal code:
	SUBMIT CANCEL

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

<u> </u>	FRAUD WARNING	
	Any person who knowingly wi	th the intent to defraud any medical agency by concealing and filing false r treatment may be found to have committed a fraudulent act which is a riminal and civil penalties.
	Username:	21 Mar
Reset y	our password	
inter a p	assword you want to use when y	rou 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 <u>special</u> <u>characters</u> .
	* Retype password:	
	our login security author	
rocess.		er your answer. This question will be used as part of the login authorization the answer for your selected question when you try to login to your account.
	* Select a question:	Please choose a security question.
	* Enter your answer:	
	* Retype your answer:	
	our password recovery cr	redentials d enter the answer. This question will be used in the password reset process
You will t		r for this question in case you need to reset your password in the future.
	* Create a question:	
	* Enter your answer:	
	* Retype your answer:	

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 lnbox.

atien	t Portal		HOME MAIL *	SCHEDULE ¥	MY CHART 👻	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION ¥	SETTINGS 🛩
Welcome	Last logged in: 3/23/2017, 11:54 A	M Patient Educat	lon 🔤	EARCH					Log Out
Practice: All	V To: Al	Y Type: All	~]						
	Туре	То	From	Subject			Practice	Rece	wed*
	Templeten	line IV inter-	Will Statistic Parts	weather, a	-		With Section). Pro-	4 50	0007
	Templeter	Dec 17. miles	With Substitution Provide	-			With Statistic Par		1967
	Record Half-Record	Day 10 June	Withheld Aug	Personal Parallel			Wittenson Aug		100
	Temptotes	they WE John	With Statute Paul	Production, or	-		With Statistic Page		-
	Terription	Day W. Islan	WOODshitch Paul	-			Mill Index. Pa		-
	Research Report	fine Witness	Withdati Paul	Proved Really	Acres (10.10.00.)		With Statistic Page		-
	DELETE								

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.

	in a						
Patient	t Portal H	DME MAIL V	SCHEDULE V M	Y CHART V STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome	Last logged in: 4/4/2	017, 2:48 PM Patient Educe	ntion	SEARCH			Log Out
Practice: All	✓ To:	All 🗸 Type: Appoin	tments 🗸				
	Туре	То	From	Subject	Practice	Received	•
	The strengt Page 8	parts of State	(in 1998)	1997	Wittenhold Pract.	100.007	
	Research State	100 CT (100	10.000	1000	Wittenson Press	100.007	
	Non-House Pages	10010-000	10. inter-	Total and a second seco	Williams Aug	100,000	
	Second State	1001-1004	(1	10000	Wittenson Press	10000	
	DELETE						

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



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

View Attached Documents

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

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

atient	Portal		HOME	MAE V SCHEDULE V MY CHART V	STATEMENTS RENEW MEDICATIONS	NEXTGEN HEALTHCARE PATIENT EDUCATION V SETTINGS V
Welcome and the	Last logged in: 3/3	31/2017, 9:19 AM	Patient Education	SEARCH		Log Out
Practice: All	✓ To	:[All V] Type:[[Documents V			
	Туре	То	From	Subject	Practice	Received*
	Description.	intern line	Williams Part	Tampin-Steel	Withdata Nati	solution
	theorem in the	interit free	M (Finite) Peril	Patient Parist Appointment Report	With Statistic Party	875.007
	Distances of	100-110-0	on principal data	Lorenzy March Teacher Marga	Withdata Aud	101.001
	(Incoments)	100010-004	WORLDWICE Parts	Drug Himpy in Chillent Can Anny-	HOUSENED PAGE	10000
	Description in contract of	intert-liter	With Statistic Park	Lati Reado	With States And	8146367
	DELETE					

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



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

Access Statements from Inbox

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

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

Patien	Portal	HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS V
Welcome	ales) Spanifest () (Last logged	1 in: 4/5/2017, 2:4:	3 PM Patient Edu	ication	s	EARCH		Log Out
Practice: All		v] 1	l'o : [All	✓ Туре:	Statements	~			
	Туре	То	From		Subje	set	Practice		Received *
	Texas and the second se	Service Service		Sector Sectors		-	The second s	and Physical Control of Control o	
	DELETE								

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

• • •							NEX	
atientporta	HOME	MAIL • SC	HEDULE V M	V CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS
elcome	Last logged in: 4	1/5/2017, 2:43 PM	Patient Education		SE/	RCH		Log Ou
Statements								
"Disclaimer: Refunds cannot be iss	ed from this site. Please conto	ct your practice if you ha	we any questions conce	ming refunds.				
Practice Name	♥] Pat	ient Name	❤ Sta	tement Date 03/13	V2017 09:54 AM	VIEW STATE	MENT	
as of 3/1	3/2017 9:54:41 AM)
= Return to Balances = Vie	w Online Payments							
Last Statement Balance:	10000						P	AY NOW
PRINT STATEMENT							IENT DATE 3/2017	
ORE SSEE		A paper copy has als	s an electronic o been mailed to yo disregard th		REMIT TO:		32011	
CRESSEE.					THE PARTY AND			
1000 00 10 1000					Report P. 1	-	INSUR	PATIENT
			DESCRIPTION OF SER	NCE	statement		AMOUNT BALANCE	BALANCE
DATE PATIENT							100	
DATE PATIENT	and the second second	-				ENCOUNTER TOTAL		
DATE PATIENT		-				ENGOUNTER TOTAL		
DATE PATIENT	CURRENT	30 DAYS	60 DAYS	BO DAYS	120 DAYS		TOTAL ACCOUNT BALANCE	
	CURRENT	36 DAYS		/	120 DAY 5		TOTAL ACCOUNT BALANCE	

- **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.

. · ·								
Patient	Portal	HOME	All 👻 SCHED	ULE V MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS V
Welcome			ntient Education	SE	ARCH			Log Out
Practice: All	~]	To : All 💙 T	ype: Medications	~				
	Туре	Το	From	Subject		Practice	Rece	ived
• •	The second second	1010-0010	10. mm	NAME OF COMPANY OF A	100	10.000	141. HE	80 C
0	Number of Concession, Name	100000000000000000000000000000000000000	10.000	144		in stracture of	10 U U	alar -
	DELETE							

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

and a start								TGEN
atient	ortal	HOME	MAIL 👻	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	SETTINGS 🗸
	ast logged in: 4/	6/2017, 5:	21 PM Patient Edu	cation	SE/	ARCH		Log Out
3 Back to Inbox 🛛 🗙 B	emove 🖼 Print							
This Medication Rene	val is Complete							
Patient Name:	and in the							
Pharmacy:		1.27						
Request sent:	No. 17.001 (19)							
	And in column							
Reason for request:								
Reason for request: Response received:	Bar 41,007 (18							
Reason for request: Response received:	And COLORY ON							
Reason for request:								
Reason for request: Response received: Response from practice:		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.

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

	•										
a	tien	Porta	6 - 1	HOME	MAB, 🕶	SCHEDULE 🛩	MY CHART 👻	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION -	SETTINGS 🐱
Velcor	me	Last log	ged in: 6/7/2017,	1:12 PM	Patient Education		SEAR	RCH			Log Out
Pract	tice: All		• To : All	• Ту	pe: Messages	•					
		Туре	То	From	Subject				р	ractice	Received*
		Conceptual de la concep	1000	State States	-					say had been being	-
	100	Manager.	And the Real	Providence in	10.00.00					March Party Task Reality	****
ш.											
	0	The state of the s	sales of the local	And here	They will strategy	and to of persons	Better 1			etter fore fair Parties	10.000

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

PatientPortal	HOME	MAIL ¥	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	SETTINGS V
Welcome Last logged in: 6/7/2013	7, 1:12 PM	Patient Education	SEAR	сн		Log Out
🗿 Back to Inbox 🚵 Beply 🗙 Bemove 🎿 Prin	t] [
Form: Message From: To: Received: Attachmenta:						

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.

Patient	Portal	HOME MAIL	SCHEDU	LE V MY CHART V STATE	EMENTS RENEW MEDICATIONS	PATIENT EDUCATION V SETTINGS V
Velcome			ient Education	SEARCH		Log Out
Practice: All	~]	To : [All 🗸] Typ	e: Messages	~		
	Туре	То	From	Subject	Practice	Received *
. • 🔤	Manager .	100011-000	1000170	the Report Testion	W. Witsonson	Nati 10000
0 1 🚔	The second se	10000	10000	Name of Contrast.	With States 1	100 Million (1997)
0 🚔 0	The second	1000-0-204	1000	Teatro institution mengi	101000-001	10.00
	DELETE					
(a) Icon Legend						

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

Patientportal		KON.			1 and	2054	NEXTGE	
PatientPortal	HOME	MAIL 🗸	SCHEDULE V	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION ¥	SETTINGS 🗸
Welcome Last logged in:	4/5/2017, 8:50	AM Patient Edi	ucation	S	EARCH			Log Out
😋 Back to Inbox 🚵 Reply 🗙 Rem	ove i 🎒 Print)ř						
Report Status - Message From:								
To:								
Received:								
n one No origina and an above root to the Notices See	11.000 Mpc4							

- **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.

atient	Portal						ALTHCARE
Velcome	• Portal Last logged in: 4/	HOME /3/2017, 3:34 PM Patien	MAIL SCHEDULI t Education	EV MY CHART V STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS V
Practice: All	~] T	o : [All 💙 Type:	Templates 🗸				
0	Туре	To	From	Subject	Practice	Received	1-
	Transmission (interior data	WORKSHIELD, PARK	The other Second	Without Aug	10.00	P
0 📋	Integration	interfe line	ROUTERS AND	Non-collectioneed	WORKSHIP AND	1100	ar 1
	Income	1000-1110-0	Withheld Public	100410	In principal lines	110.00	
	Inspect	table 11 films	WOMEN Test	section and	Withheld Part	instead of the second	1
0	Transmission in contract of the local division of the local divisi	Inter-C. New	With Statistic Proc.	-	With Indiana Providence	10.00	P
	DELETE						

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.

								TGEN
Patientpo	rtal HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome Last	logged in: 4/3/2017, 3:34	PM Patient Educa	ion	SE	ARCH			Log Out
Initial Set (Page 1 of 1)								
S Back to Inbox	evious 🔘 Next 🛃 Subn	nit Completed Forms 🖨	Print					
Demographics	s First	Blood Type:	Soc. Se]			
Emergency Co	ontact Information							
Last Name:Address:	First	MI:		one:				
City/State/Zip:			Alt. Phone D	esc:]			

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

							TGEN
Patientportal HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome Last logged in: 4/3/2017, 3:34	PM Patient Educatio	2017	SE	EARCH			Log Out
Diritial Set	a Constituted Service 198	Drint					
SEXTOLOGY Services S and S year	it Lompieted Forms Ca	KONS (
Thank you for taking the time to complete these online fo	rms. Your completed forms	have been submit	tted to your practice for	review.			
Submit an Interactive Medical Form

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

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

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



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

MY CHART ¥	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS V
View My Chart	RCH			Log Out
Request Health Record				
			1	IMH
			Don over M	INIH tenena History
	Request Health Record	KCH	RCN .	Request Health Record

- **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.

								TGEN
PatientPortal	HOME	MABL 🗸	SCHEDULE V	MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Nelcome Last logged in: 4/3/201	7. 3:34 PM	Patient Education		SEARCH	E Carlos de la			Log Out

- **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.

Patient	Portal	HOME MAIL •	SCHEDULE V	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome	Last logged in: 4/3/201	7, 9:14 AM Patient Ed	lucation	SEARC	H			Log Out
Practice: All	V) To:[All	V Type: Per	sonal Health Record					
Practice: All	✓] To :[All	✓ Type: Per	sonal Health Record 🔽	Subject		Practi	ce	Received
Practice: All	9673332999			Subject	A 100-11 10 10	Practi	ce	Received *
	9673332999			Subject	e 1	Practi	ce	Received*

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

Patient's							TGEN
PatientPortal	HOME MAIL V	SCHEDULE ¥	MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION ¥	SETTINGS ¥
Welcome Last logged in:	5/19/2017, 1:28 PM Patient Ed	ucation	SE	ARCH			Log Out
into Al Bart - Tant. Manifest Medica No.)			Choose a	practice	✓ Choose a	patient 💙
(for Mi Chill # Intersy die 111 Marsh) og	1999, 10' (10') • House (10') (10')				Ge	back to my chart Who has	viewed my chart?
Chart revision date Each b	rowser has its own settings to control ho	v PDFs open from a we	b page. If you do not s	se your document op	en below, click 'Download N	ly Data' button below.	
2/20/2017 Char	t 2/20/2017					O Soundard My Data	eve CCDA Send

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

- **3** From the PHR message page, you can:
 - > Click **Download My Data**, to download and save the chart.
 - > Click Save CCDA, to save the medical chart in your local drive.
 - > Click Send, to send the chart to another provider.
 - > Click **Go back to my chart**, to go back to your chart.
 - > Click Who has viewed my chart, to find viewers for your chart.

Delete Inbox Items

You can delete inbox items from your inbox.

- 1 On the NextGen Patient Portal home page, click Mail, and then select Inbox.
- **2** Perform one of the following actions:
 - To delete individual items, select the check box next to an item you want to delete.

Patient	Portal HOME	MAIL V	SCHEDULE V	MY CHART V STATEMENTS	RENEW MEDICATIONS		EALTHCAR SETTINGS V
Velcome	Last logged in: 4/13/2017,	10:38 AM Pati	ent Education	SEARCH			Log Out
Practice: All	V To : All	V Type: All	✓		.		
	Туре	To the	From	Subject	Prac	tice	Received *
	Personal Teadle Texand	sales in the	WORKSHITTER	Person Roll Rever 10		Photo: Nacl	-
V	Territory Teach	100111-000	10 mm	Test oppint this second		Plantes (Pres)	
	-	10000	1000	Internet (17.20 horses		Chatter Press	******
	DELETE						

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

Patient	Portal HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸 STAT	TEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome John D	oe! Last logged in: 4/13/2017, 1	.0:38 AM Pati	ent Education	SEA	RCH			Log Out
Practice: All	V To : All	✓ Type: All	~					
	Туре	То	From	Subject		Prac	tice	Received *
	Property NaME Record	100-110-0	Withhand Paul	Personal Paulity			Plantati Page	100.000
	Pressed Table Second	100-1216	With Industry Providence	Personal Paulity I			Plantati Pauli	1000000
	No. May York	10010-004	1.00	The spot these			Carlot Paci	1000
V			100.0	1000 core (1110	line.		Carlos Fact	1000
7	DELETE							

3 Click Delete and then click OK.

Print Inbox Items

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

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



- **3** Click Print.
- 4 Select a printer, and then click **Print**.

Send Messages

You can send messages to your practice.

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

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

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.

2) Select Message Category and Recipient	
Please select the appropriate message category and recipient from the drop down lists below. Asterisk (*) denotes required field.	
*Category: Please make a selection.	
* Subject:	
* Message:	
A A A A A A A A A A A A A A A A A A A	
↓ · · · · · · · · · · · · · · · · · · ·	
*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	

- **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.

Datiant									
Patient	Portal	HOME	MAJL 💙	SCHEDULE V	MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Welcome and the	Last logged in: 4/3/	2017, 3:34 PM	Patient Education		SEARCH				Log Out
Practice: All	♥] From	m : [All 🗸	/ Type:[All	~]					
	Туре	То		From	Subject		Practice	Sent	
	Territoria.	and the local dist	(field	10011-000	10000104		this was a second se		W
	Terrapean .	of the local division of	the contract	100-100	14		we window the		107
	Terration (With Street or	(Test)	10111-004	10000		With Street and Pro-		10 C
	Spectrum 1	1.04		100111-000		10.100	With Street and Street		
0 🛤	-	1.00			1000-00		William Pa		
D 💭	Sector Street	(1. inst		10011-004	10000		WORKS, NA		
	DELETE								

- **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.

lect Your Medical Practice select the medical practice for that appointment. Practice:	1. ENTER REQUEST	2. SELECT APPOINTMENT	
	ect Your Medical Practice		
*Practice:		ppointment.	
	*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 app	ropriate appointment category and desired locat	ion from the drop down lists below. Asterish	k (*) 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 app	propriate appointment category and desired locati	ion from the drop down lists below. Asteris	k (*) denotes required field
*Select provider/group:			
*Select category:	×		
*Select location:	×	Address	
	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.

Location Address Information	X
Address information for this location	
	1
	Click to
	show a
	<u>map of</u>
The second se	the
	address.

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.

*Reason for ap	Priority: Normal
*Make appoir	ntment for: This Week
*Preferred	date/time: vto v
Alternate	✓ Mon I Tue I Wed I Thu I Fri I Sat I Sun date/time:
	If this is a true medical emergency please contact your Emergency Medical Services (911), or ca hospital or medical practice. Email and appointment request will be answered within 24 hours.

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.

*Reason for appointment:	Carned Darky
*Priority:	Normal
*Make appointment for:	This Week 🗸
*Preferred date/time:	*Start date: 04/10/2017 Ⅲ 04/16/2017 Ⅲ 9:30 AM ↓ to 5:30 PM ↓ ✓ Mon ✓ Tue ✓ Wed ✓ Thu ✓ Fri ✓ Sat □ Sun
*Disclaimer: If this is a tru	ue medical emergency please contact your Emergency Medical Services (911), or call

3 Click Search. Select an appointment from the list.

	1. ENTER REQUEST	2. SELECT AP	POINTMENT
sults v	vill show the first few available appoin	ntments. If you do not agree with any of the date	es and times please click o
	. 2	n next to the appointment date and time you pr	efer. Appointment selectio
This	is an Real Time Appointment!		
	Provider/Group	Location	Date
\bigcirc	1.110	tel largeline tar 1776	
\bigcirc	21-22-00	test transplices for 1776	
\bigcirc	1	101 Tangation 141 TT 18	
\bigcirc	1-1-0	tel largette to 1758	
\bigcirc	10.000	101 Tangatan 1ar 1778	
			Load more >

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: 04/10/2017 III 04/16/2017 IIII
*Preferred date/time: 7:15 AM V to 12:00 PM V
🖉 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**.

	nent Request 1. ENTER REQUEST	2. SELECT A	PPOINTMENT
		ntments. If you do not agree with any of the da	
	lick on the corresponding radio butto is an Real Time Appointment!	n next to the appointment date and time you	prefer. Appointment selection s
	Provider/Group	Location	Date
0	10.000	ter brighter by 1778	
0	1	ter tangetos tar 1778.	10.001
0	11.1148	ter target in 1778.	
0	11 11 10	ter target in to 1778	
0	21.2148	tel largeline for 1778.	
Back	to first available	BOOK APPOINTMENT	Load more >>

6 Click Make another appointment, to make another appointment.

		2. SELECT APPOINTMENT	3. VIEW DETAILS
ir appointment is b	ooked		
can find all of your a Make another appoin	appointments by clicking on the My Appoin atment Print for your records	tments link.	
atient:	L Tabard		
ate:	\$100,000 Telephone and		
rovider:	Co., Marcol, Millione My.		
ocation:	an annaichte August Statis Statis Statis		
hone number:	CONTRACTOR AND ADDRESS		
ype:	1100		
structions:			

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 ථ Prir	<u>nt</u>
This appointment request is awaiting your response	
Date practice responded:	
Proposed appointment date:	
Proposed provider:	
Proposed location:	
Constants of Table	
Message from practice:	
Original Appointment Request	
Patient Name:	
Date sent to practice:	
Requested provider:	
Requested category:	
Requested location:	
Appointment priority:	
1st preferred:	
2nd preferred:	
Reason for appointment:	
Tolline up	

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 La	nst logged in: 4/10/2017, 10:32 AM Patient Education	SEARCH
🚱 Back to Inbox 1 🗛	ccept 🔚 Reply 쮦 Recall Appt. Request 🗙 Remove 🛃 Print	
This appointment reque	est is awaiting your response	
Date practice responded:	No. 10.007 Md.2 No.047	
Proposed appointment d	ate:	
Proposed provider:	D. Some	
Proposed location:	Withhelm Part, (a)	
	Concepts of Table	
Message from practice:		
Original Appointment Req	juest	
Patient Name:	and Tax	
Date sent to practice:	Nov 10,007 1,000 No.047	
Requested provider:	D. Dom	
Requested category:	follow-pa	
Requested location:	# STadot Part (st	
Appointment priority:	No. 14	
1st preferred:	No. Tay May Top True Spinsor WE All the COMPANY	
2nd preferred:	Ref or The Ison 620 Million 2020 MR	
Reason for appointment:		
Tollow up		

- 2 Click Reply.
- 3 In Reason for new appointment, enter the reason to change the appointment.

Sack to Inbox 斗 Send		
* Reason for new appointment:		^
		Ý
	"Disclaimen! If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical positions. Email and appointment request will be answered within 24 hours.	

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.

G Back to Sent Items	Accept	Recal	Appt. Reques	X	Remove	4	Print
This appointment requ	est is pend	ling					
Patient Name:	100.000						
Date sent to practice:	No. 100		-				
Requested provider:	Ball and						
Requested category:	100						
Requested location:	-	-					
Appointment priority:							
1st preferred:	100	-		-			
2nd preferred:							
Reason for appointment							
light on government							

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:
Date:
Provider:
Location:
Contract Contra
Phone number:
Туре:
Instructions:
Teat time
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	

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:
Date:
Provider:
Location:
Concernance of the second seco
Phone number:
Туре:
Instructions:
Real local
I would like to:
Cancel This Appointment
Reschedule This Appointment

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

I would l	ike to:		
Cancel TI	his Appointment		
Reason: [Please select a reason	~	SUBMIT
Reschad	ule This Appointment		

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

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

Delete a Pending Appointment Request

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

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

Date practice responded	E Har a to the last and the
Proposed appointment	date:
Proposed provider:	D. Some
Proposed location:	# 305adot, Pari, pri
	Literating, 11 1848
Message from practice:	
Continues in the	
Original Appointment Re	quest
Patient Name:	and the
Date sent to practice:	No. 4131307 (1474) 48-387
Requested provider:	D. LONG
Requested category:	totage that
Requested location:	W SPlantet, Parl, Ltd.
Appointment priority:	No.14
1st preferred:	Nuclear NE Mile 12 Mil
2nd preferred:	
Reason for appointment	t
The second second	

3 Click OK.



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

The pending appointment request is removed from the patient account.

Viewing Appointments

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

Export an Appointment

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

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

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

atien	Portal		HOME MAIL ~	SCHIDULE V MY CHART V	STATEMENTS RENEW MEDICATIONS	PATIENT EDUCATION V SETTINGS
/elcome		ln: 5/17/2017, 5:48 PM	Patient Education	SEARCH		Log Or
ty Appointmen	vts					
This discle	imer message will be prese	nted to patients in Portal's My Appo	intments Page.			
🛃 Include p	ast appointments Pra	etice: Al ·	Patient: All •			
	Status	Patient	Provider	Practice	Location	Date-
						And and the second second
	(Contract of Contract of Contr	Ten 101-1	Start, Sec.	With Standard, Proc.		and the second second
	-	Darmer .	Test into	Parala ha	All Street of Local Division of Local	and the second
0 20				A REAL PARTY	An annual an annual an	
0 20	The set	la ser	Test inc	and the second second		
		The second	No. inc	A Martin Part	Contraction (Sec. or other	-

3 Click Export to Calendar.

Patient:	
Date:	ACCESSION AND ADDRESS OF
Provider:	State law
Location:	With Street and Arts
	Contraction Contraction
	10. Table
Phone numb	r:
Type:	The second se
Instructions:	
Teach Street	
would like to	

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

C H A P T E R 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.

Patientpor	rtal		HOME SING V	SCHOLE + MY CHART + BARDWATE ADAM MERCATOR	NEXTGEN
Waterma Tille Till III III	Last lagged in: \$/33/2027, \$133 AM	Patient Education	SEARCH		Lug Out
Anna 1999, N. W. 199	that the second from the basis of	1		Done s pectos	V Crosse a patient
				Durin	at each seriest my chief which has used any chief
Vote	Results				
Allegies	Test Nerve		Practice	Collection Date	
Medicanon	(1000) Table 1000		Name and Address of South	100000000000000000000000000000000000000	District in
 Medications 	CONTRACTOR OF A		Number Instant Product	CONTRACTOR AND A DESCRIPTION	Delatin 🛩
Codeau.			manufacture in the second	Territoria contra data	petele w

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

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

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

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

- **3** Click **Download and send my chart** to save your chart as a PDF. For more information about downloading and sending your chart details, see the topic, Download My Chart as PDF (see "Download Personal Health Records as PDFs" on page 52).
- 4 Click Who has viewed my chart to view the activity log of a patient chart. For more information about viewing your chart activity log, see the topic Who Viewed My Chart (see "See Who Viewed Your Chart" on page 58).

Save Your Personal Health Records

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

Download Personal Health Records as PDFs

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

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

Patientport	al		NON	Mut, v	SOHOULE -	MY CHURT -	PATIMENT	ABNEW MEDICATIONS		TGEN
	c11, it legged in: 5/19/2017, 11:32 AM	Potient Educat		EARCH	ionica e	an cease a	and and a	APRIL PROFILE		Log Out
VOICO PRE LED	(loggere in: 2/29/2017, 22:22 MP1	Potare Lauca		EAUKCH			Onne	e predice	♥] 0:000 ± 1	
								6	a back to my chart who has a	ravel my chart
Chart revision date	Tach because has its own arttings to control	how PDFs open from a web page. If you	in the state of th	-S.S. Transford My I	Neter Instance Designs					
3/20/2017	Chart 10/12/2016								Oter	e GEOA Secol
5/30/2016 5/30/2016				ortholity of Care	Document (C CDA)					1
		France Dataset of Lands Tran	And							
		Roma (s) Risearchy Language(s)								
		Contact Info	William.							
		Browniad M Browniad Double	Canada and a state of the state					2		
		Andree Sambert ante	Same or a second							
		Selected Evolution								
		Logal anti-only at a Context with	procession and a state description	-						
		Received purchased by Earlier Lade	CALCE PLANE							

- **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.

PatientPorta				
Velcome Lest la	agged in: 5/19/2017, 11:32 AM	Patient Educat	SEARCH	Log On Choose a practice
one is the college, therefore it				
to be the set of some does to	100 m 10 m 10 m 10 m 10 m 10 m			Go back to my drain Who has served my cha
Chart revision date	Each browser has its own actilings to costrol how PD	's open from a web page. If you	not see your document open below, click 'Download My Data' button below.	
2/20/20127	Chart 10/12/2016			O torter Section Section Section
5/30,0915 3/15,0915			Continuity of Caro Document (C-CDA)	
		Falsed Sate of both	States - Mr.	
		See Receivi	-	
		Effective Language(1)		
		Contact info	in b. Litter.	
		Reconnect M December Controls	THERE IS A DECEMBER OF THE	
		Author Contact into	Tang and a state of the state o	
		Electric and		
		Informati	NAME AND POST OF TAXABLE PARTY.	
		Constant inde		
		Logal activation day	NAMES AND COMPANY ADDRESS OF A DOLLARSH AND ADDRESS OF	
		Constant and		

- **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: All
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

10/12/2016	Search by Provider	Search by Organization
5/30/2016	Last name, first name:	
5/16/2016		
	Specialty:	
	City:	State:
		~
	Zip:	
	SEARCH	

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

	rovider/Organization	Specialty	Address	City	State	Zip	Phone
0	train failing	Weater Land	STOCKED IN	and the second sec	-	801.00	1.00.00
0 1	Property Park		1981 Sector Teacher H.	Territory.	100	1000	
•	in the		NUM CONT	Testine .	- 19	1004	
0	rouge, field		MC Server Tex Tex 4	(inclusion)	-	100	
0	-	Sails Neigereet	Territory of	Treat		100	
0	distant. Intelli		Million and March 1994	(Incompany)	100	1000	

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.

Patient	ortal
Welcome	Last logged in: 5/19/2017, 11:32 AM
sets W. Der v. Daut	Maathan Madhar Practice)
the lat loss \$	the lot of the sector of the sector of the sector of the
ci ,	1.
Chart revision	n date Send Chart 5/30/2016
Chart revision	Send Chart 5/30/2016
	Send Chart 5/30/2016
2/20/2017	Send Chart 5/30/2016 Please select the method that you want to send the cha

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

Chart revision date	
2/20/2017 10/12/2016 5/30/2016	Back to Send My Chart 5/30/2016 > I have provider's direct address + What is direct address? + Provider's DIRECT Address:
5/16/2016	Direct address is not an email address.
	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.

	* Enter email address(es):
10/12/2016	* Enter email address(es):
5/30/2016	Multiple email addresses must be separated by commas.
5/16/2016	Subject:
	CCD Document Being Sent on behalf of John Doe From NextGen Patient Portal
	Message:
	· · · · · · · · · · · · · · · · · · ·
	Maximum allowed 250 characters.
	The password entered will be used to password protect the chart file attached to
	the email. You must communicate to the recipient separately. It will NOT be included in the email.
	in the email.
	in the email.
	in the email. • Password:
	in the email. Password: Use 8 or more characters
	in the email. Password: Use 8 or more characters Must include at least one numeric digit

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.

• • •					NEX	
atientportal	HOME MAIL V	SCHEDULE V MY CHART V	STATEMENTS	RENEW MEDICATIONS		SETTINGS 🛩
lcome Last logged	In: 5/19/2017, 1:28 PM Patient	Education SE	ARCH			Log Out
matching to Williams 14	All interview from the line i	was a frank)	Choose a p	actice	Y Choose a p	atient 🔽 🗸
Salar Million & second documents				Dow	nload and send my chart Go	back to my chart
Logged in Username	Clinical History For	Event Description			Event Date	
Later Star	cost in the	Specifi State States	100 C		A REPORT OF A REPORT	<u>^</u>
patter film	and the second second	Tarriel Programming Research	And a second second		Longer March 1997	
control Times	and the loss	Through Trading - Microsoft Address 17	NUMBER AND ADDRESS OF	True Rectant	A DESCRIPTION OF AN ADDRESS	
Longer Thing	converte from	Specific Programmers, Managers	And Address of the Ad		THE R. LEWIS CO., LANSING MICH.	
International Contract of Cont	100110-004	Taxanti Deservativa, Bassing	and the second second		Transformer and the second	
come lines						
	canal dis Const					- 1
Later Star	and the loss	Specie Stray Street Barray	and the second		100000000000000000000000000000000000000	-
conciliant conciliant	1001 W. Dan 1001 W. Dan 1001 W. Dan	Speciel And Total Annual Speciel Annual Annual Speciel Annual Annual Annual			A REAL PROPERTY AND AND A	
and the second second	AND THE THE AND THE AN					

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.

								TGEN"
entPortal	HOME	MAIL 🗸	SCHEDULE 💙	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
Last logg	ed in: 4/24/2017, 1	10:18 AMPatient E	ducation		SEARCH			Log Out
ements								
er: Refunds cannot be issued from 1	his site. Please contact	your practice if you ha	ive any questions concer	ning refunds.				
and the second second								Expand
Instant Court Magneter								Collapse
as of 4	/24/2017 6:27:13 AM	л						1
View Last Statement	iew Statement Histo	ry 📕 View Online F	ayments					
	Due:		interest of					
**Disclaimer: Payments made	online may not be refle	cted in the current acc	ount balance for several	days.			PA	NOW
	Last logg ements er Refunds cannot be issued from t (as of 4 View Last Statement Balance: Current Patient Balance: Remaining Patient Balance I	Last logged in: 4/24/2017, 1 ements r: Refunds cannot be issued from this site. Please contact as of 4/24/2017 6:27:13 AM View Last Statement Texture Last Statement Texture Current Patient Balance: Patient Banance: Patient Banance: Remaining Patient Balance Due:	Last logged in: 4/24/2017, 10:18 AMPatient Ed ements r: Refunds cannot be issued from this site. Please contact your practice (f you ha as of 4/24/2017 6:27:13 AM View Last Statement = View Statement History = View Online F Last Statement Buiance: Current Patient Buiance: Remaining Patient Bending:	Last logged in: 4/24/2017, 10:18 AMPatient Education ments r Refunds cannot be issued from this site. Please contact your practice if you have any questions concer as of 4/24/2017 6:27:13 AM View Last Statement = View Statement History = View Online Payments Last Statement = Buiance: Current Patient Baiance: Patient Specific; Remaining Patient Baiance: Current Pati	Last logged in: 4/24/2017, 10:18 AMPatient Education ments as of 4/24/2017 6:27:13 AM View Last Statement View Statement History View Online Payments Last Statement Balance: Current Patient Balance: Current Patient Balance: Patient Payments Pending:	Last logged in: 4/24/2017, 10:18 AMPatient Education SEARCH ements	Last logged in: 4/24/2017, 10:18 AMPatient Education SEARCH aments as of 4/24/2017 6:27:13 AM View Last Statement View Statement History View Online Payments Last Statement View Statement History View Concerning View Statement	Last logged in: 4/24/2017, 10:18 AMPatient Education SEARCH mments r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. r: Refunds cannot be issued from this site. Please contact your practice (f you have any questions concerning refunds. Last Statement # View Statement History # View Online Payments Last Statement Balance: Patient Payments Bending: Remaining Patient Balance Patient Payments Bending: Remaining Patient Balance Patient Payments Bending: Remaining Patient Balance Patient Payments Bending: Pati

2 Click View Last Statement.

Statements								
Disclaimer: Refunds cannot l	e issued from this site. Please contact	your practice if you have o	any questions concerning refu	ids.				
actice Name	 Patient Name 	1000 (B. 2000)	Statement Date 10/11/	2016 07 23 AM 🔹	VIEW STATEM	ENT		
as of 10/1	1/2016 7:23:59 AM)
Return to Balances	View Online Payments							
Last Statement Balance:	10000							
						TEMENT DATE		
RINT STATEMEN	т							
RINT STATEMEN	п					10/11/2016		
	Π							
RINT STATEMEN	Т			REMIT TO				
RESSEE	Т			Bullion B	and the first of t			
	П				alian Promo			
RESSEE:	Т			Section 8	alian Promo			
NE 6 6 6 6 6				Section 8	alian Promo	10/11/2016	INSUR	PATIENT
DATE PATIENT		DE	SCRIPTION OF SERVICE	Section 8	alian Promo		INSUR BALANCE	
DATE PATIENT		DE 1	SCRIPTION OF SERVICE	Section 8	interfreeter 1 tot	10/11/2016 AMOUNT	BALANCE	BALANCE
DATE PATIENT		DE	SCRIPTION OF SERVICE	Section 8	alian Promo	10/11/2016	BALANCE	BALANCI
DATE PATIENT		DE :	SCRIPTION OF SCRIPTION	Section 8	interfreeter 1 tot	10/11/2016 AMOUNT	BALANCE	BALANCI
DATE PATIENT		DE:	SCRIPTION OF SCRIPTION	Section 8	interfreeter 1 tot	AMOUNT	BALANCE	BALANCI
DATE PATIENT		00	SCRPTION OF SERVICE	Section 8	interfreeter 1 tot	10/11/2016 AMOUNT	BALANCE	BALANC

- **3** To view your statement history based on filters, select from the following options:
 - > If you are enrolled to more than one practice, select the relevant practice.
 - > If you are a care manager, select the patient name.
 - > If you want to view statement for a specific date, select the date.
- 4 Click View Statement.
- **5** To return to statement page, click the Return to Balances link.
- **6** To print the statement, click **Print Statement**.

View your Statement History

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

							NEX	TGEN
tientPortal	HOME	MAIL ⊻	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
	ged in: 4/24/2017, 1	10:18 AMPatient Educ	cation		SEARCH			Log Out
Statements								
statements								
laimer: Refunds cannot be issued from	this site. Please contact j	your practice if you have	any questions concerr	ning refunds.				
Contractory Contractory								Ext
Construction of the International State								
n maaraa in aa dhii Maanaa ah Maanaa in ah Maanaa								_
	4/24/2017 6-27-13 AM							_
as of	4/24/2017 6:27:13 AN	4						Ext Coll
(as of			ments					_
View Last Statement			ments					_
View Last Statement Last Statement Balance:			ments					
View Last Statement Last Statement Balance: Current Patient Balance:			ments					
View Last Statement	View Statement Histor		ments					_
View Last Statement Last Statement Balance: Current Patient Balance:	View Statement Histor		ments					_
View Last Statement	View Statement Histor	ry 🔋 View Online Payı	11. 11.1 11.1 11.1	adays.				_

2 Click View Statement History.

\.:								TGEN
tientPortal	HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
ome Last logg	ed in:	Patient Ed	lucation	s	SEARCH			Log Out
Statements								
isclaimer: Refunds cannot be issued from	this site. Please contact	your practice if you hav	ve any questions concerr	ning refunds.				
actice Name	✓ Patier	nt Name	✓ Stater	nent Date (Select Sta	tement Date) 🗸	VIEW STATEMENT		
(nt Name	✓ Stater	nent Date (Select Sta	tement Date) 🗸	VIEW STATEMENT		
actice Name as of 4/24/201		nt Name	✓ Stater	nent Date (Select Sta	tement Date) V	VIEW STATEMENT)
(L7 7:31:05 AM	nt Name	▼ Stater	nent Date (Select Sta	tement Date) V	VIEW STATEMENT)
as of 4/24/201	L7 7:31:05 AM	nt Name	▼ Stater	nent Date (<u>Select Sta</u>	tement Date) V	VIEW STATEMENT		
as of 4/24/201	L7 7:31:05 AM	it Name	✓ Stater	nent Date [(Select Sta	tement Date) 🗸	VIEW STATEMENT)
as of 4/24/201 Return to Balances View Onlin Last Statement Balance:	L7 7:31:05 AM	it Name	▼ Stater	nent Date (Select Sta	tement Date) 🗸	VIEW STATEMENT)
as of 4/24/201 Return to Balances View Onlin Last Statement Balance: Current Patient Balance:	L7 7:31:05 AM	tt Name	▼ Stater	nent Date (Select Sta	tement Date) 🗸	VIEW STATEMENT)

- **3** To view your statement history based on filters, select from the following options:
 - > If you are enrolled to more than one practice, select the relevant practice.
 - > If you are a care manager 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.

N:						TGEN
ientportal HOME	MAIL V SCHED	ULE V MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS 🗸
e Last logged in: 4/24/2017, 10	:18 AMPatient Education		SEARCH			Log Out
tatements						
aimer: Refunds cannot be issued from this site. Please contact yo	our practice if you have any question	ons concerning refunds.				
The second se						Expa
						Expa Collar
anana ing kabupatén Milandari Ang Kabupatén Can						
as of 4/24/2017 6-27:13 AM						
as of 4/24/2017 6:27:13 AM • View Last Statement = View Statement History	View Online Payments					
	View Online Payments					
View Last Statement View Statement History	* View Online Payments					
View Last Statement View Statement History Last Statement Balance:	* View Online Payments					
View Last Statement View Statement History Last Statement Balance: Current Patient Balance:	View Online Payments					_

2 Click View Online Payments.

	History					
sclaimer: Refunds canno	ot be issued from this site.	Please contact your practic	e if you have	any questions concerning re	lunds.	
Patient	Portal Team Practice1					Return To Balances Return To Statements
ecent Online Payment	\$					
			Status	View Details		
^P ayment Date	Amount Submitted	Amount Processed	Status	view Decailo		
Payment Date	Amount Submitted	Amount Processed	Status	View Details		
Payment Date	Amount Submitted	Amount Processed	Status			

- **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.

• • • • •								TGEN
atientPortal	HOME	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION V	SETTINGS V
	gged in: 4/24/2017,	10:18 AMPatient Edu	cation	s	EARCH			Log Out
3 Statements								
Disclaimer: Refunds cannot be issued fro	m this site. Please contact	your practice if you have	any questions concern	ning refunds.				
								Expan
Property and the second s								Expan Collap
	of 4/24/2017 6:27:13 A	И						
	of 4/24/2017 6:27:13 AI	И						
e View Last Statement			rments					
View Last Statement			ments					
View Last Statement Last Statement Balance:			ments					
View Last Statement Last Statement Balance: Current Patient Balance:	View Statement Histo		ments					
View Last Statement Last Statement Balance:	View Statement Histo		ments					
View Last Statement Last Statement Baiance: Current Patient Balance: Patient Payments Pending:	View Statement Histo	ry E View Online Pay	11 111 111 111					

2 Click Pay Now.

*D	
	Pay Total Due: USD \$228.00 Pay Other Amount: USD \$ All amounts in U.S. Dollars.
	Select payment type
*Cardholder's first name:	
*Cardholder's last name:	
Select a billing address: *Address line 1:	Enter a different billing address.
Address line 2:	
*City:	
*State:	
*Zip:	lH
This is an electronic copy of your st statement online, please disregard	atement. A paper copy has also been mailed to you. If you pay this the paper copy.

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	
	MM/YY	
	Submit Cancel	
POWERE	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.

*Routing number:	What is the routing number?
*Account number:	
*Re-type account number:	
*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.

Patient	ortal		HOME	MAIL 🗸	SCHEDULE 🐱	MY CHART 🐱	STATEMENTS	RENEW MEDICATI	ONS PATIENT EDUC	CATION V SETTINGS V
	Last logged in: 11/1/2017	. 11:40 AM	Patient Education		SEARCH					Log Out
Patient Portal Dashi	ooard)							[]	8	
PRACTICIS PRODUCIONE PL	Contact information: Phone: View Profile Page		Welcome to NextGen Pati		ar apportant takes t	get and Te shot.				
111box	Second 1 - cont	Compose an Email	For appointment in			nedule an Appointment	Remin	n		Schedule
P. 1073-0046 PS	Sartuari's Neurond Haalth Record	-					Provide Page 3			Schedule +
10/12/2017					Medications					
Results	<u>Iest Panel Name</u>	Ordered by 🗘	Performed date	•	Patient 0	Medication Name		Dosage 🗘	Prescribed 0	¢ x
Results Patient ♦	<u>Iest Panel Name</u> ≎	Ordered by 🗢	Performed date	View Results	Patient ©	Medication Name		Dosage 🗢	Prescribed B Rescribed B	10 A
Io/12/2017 Results									6	Refit

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.

lcon	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.

 Visits 	Results			
Allergies	Test Name	Practice	Collection Date	
a (1997) - 199	(a) Aurila's an orrestoria.	101000-001-01	1000010-00000	Details ~
 Medications 	100 fac 2420	100401		Details ~
a Conditions	A- Vitals			
Results	You have no information to display			

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

Visits	Results				
Allergies	Test Name		Practice	Collection Date	
Medications	the surface of the second	100	With the Art	11.11.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.	<u>Hide</u> 🗸
Medications	Component:	Standard Range:	Your Values:	Comr	nents:
Conditions					
conditions	term that contain		All strategies in		<u>Hide</u> 🗸
Results	Component:	Standard Range:	Your Values:	Comr	nents:
/	- 10	-	1.00	1.7177 1010 1010 10	1. ACTIVITY 11
Vitals					

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.

atientpor	tal HOME MAIL~	SCHEDULE V MY CHART V ST	TATEMENTS RENEW MEDICATIONS PATIENT	EDUCATION - SETTINGS
	ast logged in: Patient Ed	fucation SEARC	н	Log Ou
Inter States, Scill 2188	1927, Toll 481, Jane W Darry Dark Machine We		Choose a practice	Choose a patient Self
Andrew Million & summ	a for the local star from the first the formation of		Download and send my	chart Who has viewed my cha
* Visits	Results			
• Visits • Allergies	Results Test Name	Practice	Collection Date	
		Practice	Collection Date	Details 🛩
	Test Name	Practice	Collection Date	Details ↔ Details ↔
 Allergies 	Test Name			

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

PatientPorta	al номе	MAIL 🗸	SCHEDULE 🗸	MY CHART 🗸	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION ~	SETTINGS 👻
Welcome Last	logged in: 5/23/2017, 8:02 PM	Patient Education	1	SE	ARCH			Log Out
into # Naco Dark Hartfiller					Choose	a practice	Choose a	patient 📃 🔻
the Real Print & succession in the	Construction of the Owner, where					G	back to my chart Who has	viewed my chart?
Chart revision date				2.2.			1	
Chart revision date	Each browser has its own setting	gs to control how PDFs o	pen from a web pag	je. If you do not see y	our document open l	below, click 'Download My D	ata' button below.	
2/20/2017	Chart 10/12/2016						Bownload My Data	ave CCDA Send
10/12/2016	-							_
5/30/2016								
5/16/2016								

- 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.

Patient	Dental V							HI	TGEN
Welcome	runai		HOME	MAIL V SCHEDULE	MY CHART V	STATEMENTS	RENEW MEDICATIONS	PATIENT EDUCATION ¥	SETTINGS V
weicome		31/2017, 9:19 AM	Patient Education	SEARCH					Log Out
Practice: All	✓ Te	o : [All →] Type: [I	Documents 🗸						
	Туре	To	From	Subject			Practice	Receive	d•
	Description .	inter-ti-line	Williamshire, Proc.	Surgita data			William Nucl. Proc.	10.0	er]
	(Incoments)	interio des	M (P (Index) Pro)	Patient Ported Appell	mare begant		With Statistic Paul	111.0	60
	Distances in	100-1120	on property Aug.	Louising Many Press	-		WORKSHIP Prod	10.0	u
	December 1	1000 10 204	WORKSHOLMS.	Drug Minig in China	Can here -		10.000 and 10.000	1000	
	Second Second	interit. See	With Statistic Presi	Lati Reado			With Statistic Parts	1000	
	DELETE								

- **2** From the Type list, select Documents.
- **3** Click the message to view the radiology image.

S Back to Inbox		
Each browser has its own settings to contro Reader.	how PDFs open from a web page. If you do not see your document open below, you can try to click on this link to download the docu	ment to your computer and open it from Adobe
	the second s	
	Comparison in the second se Second second s Second second sec	
	A REAL PROPERTY AND ADDRESS OF TAXABLE PARTY.	

C hapter 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.

Patientp	Portal		HOME	MAE	SCHEDULE ~	MY CHART -	STATEMENTS	RENEW MED	DICATIONS		
	UILCLL Last logged in: 11/1/2017	, 11:40 AM	Patient Education		SEARCH						Log Out
Patient Portal Dashi	board)										
PRACTICES	Contact information: Phone: View Profile Page		Welcome to NextGen Pate		ne gestimet leigt	o get pour Ro shot.					
Inbox 10/16/2017	Seried Land	Compose an Email	For appointment in			thedule an Appointment	Remi				Schedule
10/13/2017 10/12/2017	Server's Perund Halfs Read						PE SPisaliset i Recal Par 3 PE SPisaliset i L = L = L				Schedule -
Results					Medications	1					
Patient O	Test Panel Name 🗢	Ordered by 🗘	Performed date	•	Batient 🗢	Medication Name		Dosage 🗢	0	Prescribed By 🗘	
	OC MEN DEPUNENTIAL PLATEST	2013/16-06-01	0655282	View Results	Nergunal2 Rented	A07801		125 MI		#395-6-c-P1	Refit
Surgerst2 Revised											
Respond Rented	CIC HER DEFERRING ALCOURT	PERMIT	0616207	View Results	Nanjural (Aartest	40/901		1(5.94)		100 (325 off or C. P.).	Refil

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.

lcon	Description
Ş	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

Select the m	ealcal proclice that pre	scribed the medication you wish	to renew.	
	*Practice:	Witness Press	~	
	*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.



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

lected N	Aedication(s):				
				_	
Select	different medication	ns		<u>Pi</u>	int Medication
			Id like to have renewed and click the submit button. If you	do not see your	medication(s)
ted, ple	ase contact your pra	ictice using the see	cure messaging functionality.		
Displa	ay any inactive medio	cations that may b	e available for renewal.		
	Prescription Name	Dose	Description	Start Date	Stop Date
			Min 1 (Min' I), and and any Sp. 2 (Min') a a method by Space	****	
	****		the second secon	****	
			_	_	
Indica	ates an inactive med	ication due to it b	eing expired. This is where the end date of the	SELECT	CANCEL

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

ication you wish to rene	W.			
dication(s):				
And Address of the A	6 180 F	COURSE STREET		
ifferent medications			P	rint Medication
e contact your practice	using the secure	e messaging functionality.	lo not see your	medication(s)
Prescription Name	Dose	Description	Start Date	Stop Date
		Mar 1 Marcola, and analysis for all matters as established for Specific		
ACCESSION NO.		300 (100001), col 1000 col 1000		
		the second second second second by a second	****	
es an inactive medicatio	n due to it bein	g expired. This is where the end date of the S	ELECT	CANCEL
	dication(s): ifferent medications ox next to all medication e contact your practice any inactive medication Prescription Name	dication(s): ifferent medications ox next to all medication(s) you would e contact your practice using the secun any inactive medications that may be a Prescription Name Dose	dication(s): ifferent medications ox next to all medication(s) you would like to have renewed and click the submit button. If you de contact your practice using the secure messaging functionality. any inactive medications that may be available for renewal. Prescription Name Dose Description	dication(s):

- 6 Select medication that you want to renew, and then click Select.
- 7 If you select inactive medications, select Yes, I would like to request the above inactive medication.

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

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

 Select Pharmacy Select the pharmacy you wish to han 	dle the refill.		
Selected Pharmacy:			
Pharmacy Name:			
Address:			
Phone Number:			
Fax Number:			
 <u>Select different pharmacy</u> 			

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



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

10 To search all available pharmacies, click Search.

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

S	preferred pharmacy is not di ndicates a pharmacy that car	played, please click on the Add New button to be modified	add your pharmacy.
Searc	ch Results (4 record retu	ned)	
	Pharmacy Name	Address	Phone Number
0	and a second sec		pinto este este e
0	Maria Marian	AND ADDRESS TO AND ADDRESS ADDRESS ADDRESS ADDRESS ADD	(2010) Maria (2010)
0	And and a second	All Contract State	(0.01 million and 1.00
0	Manual Intelligence	ALL OF THE OWNER ADDRESS AND	1 (11) (11) (11)

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

- **11** Click the pharmacy's name to select it.
- **12** To set the default pharmacy, select **Set as your NextGen Patient Portal preferred pharmacy**.
- 13 Click Select.
- **14** Under Submit Renewal, perform the following:
 - a) Select the Reason for renewal.
 - b) Select the **Provider** to whom you are sending the medication renewal.
 - c) In Comments enter the reason for the prescription renewal.

elect Reason and Provider fo	· · · · · · · · · · · · · · · · · · ·
*Reason:	▲
*Send to:	
Comments	
	~
	Maximum length: 500 characters
*Disclaimer: If this is	s a true medical emergency please contact your Emergency Medical Services (911), or call
your nearest hospit	al or medical practice. Email and appointment request will be answered within 24 hours.

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.

Select different	pharmacy		
Pharmacy search:	enter <pharmacy> or <address> or <zip code=""></zip></address></pharmacy>	SEARCH	ADD NEW

2 Click Add New.

Select different ph	armacy	
	* Pharmacy name:	
	* Address:	
	* City:	
	*State:	✓
	* Zip/Postal code:	-
	Phone number:	(
	Fax number:	(
		SAVE CANCEL

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 \mathbf{s} icon displays before the pharmacy's name.

	Pharmacy Name	Address	Phone Number		
• 🖬	Replica .	Los Traps. 10 Million	100	Ø	í
0	1000	New York Street, Marcaletter, M	1012-00120	ø	-
0	And in case of the second			ø	
0	Rene Long No. 14	Children State	80.0410	Ø	
0			500,000,000	Ø	
0	111-101-10100	One COLORAD Auto COL		٢	1

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

CHAPTER 10

Health Education Materials

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

Note: Information from this website does not replace the advice of a doctor. Healthwise disclaims any warranty or liability for your use of this information. Your use of this information means that you agree to the Terms of Use. Healthwise is a Utilization Review Accreditation Commission (URAC) accredited health website content provider. Click the following link to find out how this information was developed to help you make better health decisions:

(https://www.healthwise.net/nextgen/Content/StdDocument.aspx?DOCHWID=supportabouthw#support-abouthw-editorial).



Search for Health Education Topics

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

- 1 On the NextGen Patient Portal home page, click Patient Education, and then select Patient Education.
- **2** You can perform the following tasks:
 - > Search health topics: The search feature enables you to research health topics. If you received a Healthwise Patient Instruction handout at the office, you can enter the code number at the bottom of the page in the Search field to view that topic or other related topics.
 - > Access interactive tools: The interactive tools in the Healthwise Knowledgebase provide you with tailored health information just by answering a few questions about your health. You can assess your risk for a heart attack, learn what contributes to stress, or even calculate the calories you burn during a particular activity. Links to these interactive tools appear throughout relevant topics and in the Health Tools section of topics.
 - > View health topics: With more than 8,000 topics on health conditions, medical tests and procedures, medications, and everyday health and wellness issues, the Healthwise Knowledgebase helps you become informed about your health to enhance partnerships with your doctors for better health decisions.
 - > Access learning centers: Use this feature to learn about medical conditions, how the body works, and other health-related topics.

Use the Symptom Checker

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

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



Read about Your Medication

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

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



Health Decision Tools

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

- 1 On the NextGen Patient Portal home page, click Patient Education, and then select Health Decision Tools.
- **2** Type your problem, and then click **Search**.



CHAPTER 11

Settings

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

Account Settings

You can change your user name, password, security questions, forgot password question, and unenroll 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.

ccount Settings	
Username	Edi
Your Username	10000
Password	Edi
Your Password	
Security Question	<u>Edi</u>
To identify you as the account owner	
Forgot Password Question	<u>Edi</u>
To request a password reset	
Un-enroll from Patient Portal	Edi
Delete your Patient Portal account	

2 Under Username, click Edit.

/our Username	johndoe
Username must be between 6-50 characters which may be a combination of letters, no and is case sensitive. * New username:	umbers and <u>special character</u>
* 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.

<u>Edit</u>
<u>Edit</u>
Edit
<u>Edit</u>
<u>Edit</u>

2 Under Password, click Edit.

Your Password		
	en 8-50 characters with no spaces, must include at le of letters and special characters.	east one numeric digit, is case sensitive
	of tetters and <u>special characters</u> .	
* New password:		
* Retype password:		
For security reasons, ple	ase provide your current password to confirm your	identity
* Current password:		
current passiona.		
	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.

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

2 Under Security Question, click Edit.

Security Question	<u>Hide</u>
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.

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

2 From Forgot Password Question, click Edit.

<u>Hide</u>
color?

- **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.

Ed
Ed
Ed
<u>Ed</u>

- 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	VIN-ENR	ROLL	

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.

This data is view	v only, with exception of Preferred Notification Meti	hods. If you see any changes th	at are needed, please contact o	ine of your practices.	
lextGen Medical					
lextGen Medical ly Practices:	Enterprise				Colla
Disclaimer					
Disclaimer					
-	a for financia din sur casa				
and the second	Recent Constant				
	dina ing ang ang ang ang ang ang ang ang ang a				
AND CONTRACTOR	And a second				
Name	And the second s	Phone Number(s)	00000	Secondary Social	
Name Date of Birth	Alex Cone Alex Alex Alex Alex Alex Alex Alex Ale	Phone Number(s)	311	Secolary Seco Secolary Secolary Recolary Secolary	
	And Conservations and Conservations and Conservations and Conservations	Phone Number(s) Preferred Notification	205.00.000	Sanaka fara Bata Nandar, fara	
Date of Birth	And Conservation and Conservation and Conservation and Conservation And Conservation And Conservation And Conservation		205.00.000	Format	
Date of Birth	And the second s	Preferred Notification	Method	Format HTML	Change Method
Date of Birth		Preferred Notification	Method Receive Emails		Change Method

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

Address(es)	Property Andread Street of Street and	Preferred Notification Met			
		Email	Receive	Emails Format	
		and a fail and	Yes	HTML	Hide
			E-mail ddress:	n de la factura est	
			Rea addres		mail
			l	JPDATE	
		Mobile Phone	Receive Message		
		1790-000-010	No	None	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.

Address(es)	Name and Address of the other states and	Preferred Notification Method			
		Email	Receive Emails	Format	
		and the second second second	Yes	HTML	Change Method
		Mobile Phone	Receive Text Messages	Carrier	
		1798-000-010	No	None	Collapse
		Тур	pe: Mobile		
			hone mber:		
			Recei	ve text message noti	fications at
				le number	
			elect Please s	elect a mobile car	rier 🗸
			UPDA	TE	
			OT DA		

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.

Nanage User Grants	
Who Manages My Account?	
San II also: W Withdow Paul	<u>Edit</u>
Accounts I Manage	
	<u>Edit</u>

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

and the same of the local data in the same			
Practice:	Expiration Date:		
Allow to have full access on my acco	ount.		
Module		View	Send/Complete
IMH		✓	\checkmark
Medications		✓	
Messages		✓	\checkmark
Templates		✓	\checkmark
Personal Health Record		✓	\checkmark
Statements		\checkmark	\checkmark
Appointments		\checkmark	\checkmark
Documents		\checkmark	\checkmark
Access expires:	3		

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 \blacksquare 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.

ho Manages My Account?		
o one else is managing your account.		
counts I Manage		
are 5. Day . Addant Hung Team Practical.		1
Practice:	Expiration Date:	
Full Access:		
Module	View	Send/Complete
Appointments	I.	4
Documents		
IMH		
Medications		
Messages	×.	×.
Templates		
Personal Health Record		
Statements	¢.	S.

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.

• • • • •		
PatientPortal		HUARL
Add new practices		
Your practice has created a patient portal	ollment for you. Would you like to add these practices into your account?	
Practice Name	Add Practice	
President Proc. 1		
ADD SELECTER	PRACTICE(S) DECIDE LATER DECLINE PENDING ENROLLMENT	

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.

Manage your practices	
You are currently enrolled in the following practices :	
PERSONAL PARTY	Un-enroll me from this practice
You have pending enrollment records from the following practices :	
Received on the T	Add this practice to my account

2 Click Add this practice to my account.

ou are currently enrolled in the following	practices :
	Un-enroll me from this prac
	<u>H</u>
After activating this practice you will be able button to add this practice to your account.	to communicate with this practice. Please click on Complete 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.

from this practice
tice to my accour
h and email required field.

- 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.

Manage your practices	
You are currently enrolled in the following practices :	
Restriction Const.	Un-enroll me from this practice

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

ou are currently enrolled in the following	practices :	
		H
completed you will not be able to commun	your portal account permanently. Once the de-activation process has nicate with your practice via the Patient Portal. To re-activate your Pa ur practice and start the enrollment process over in order to resume	
Reason: Not satisfied		

- **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.

lcome	Last logged	l in: 4/26/2017, 4:05 PM	Patient Education	
Paperless!				
receive an ele	ctronic version of	r statements online. By checkir f your statement from your pra ronic and paper statements.		
Practice Name		Receive only e	lectronic statements	V
The second se				
PRODUCT AND ADDRESS OF THE		\checkmark		

- **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: (<u>http://get.adobe.com/reader/</u>)

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.

							2	L	•				R
Thu MAY 1	rsd	ay											
	Upcoming Appointments							Inbo	•				
For ap	spainte bysicie	nent ir In's of	iforma fice.	tion, p	lease c	ontect						1 vit	15 >
< 500	Max	Ma	y 20	017	RI	>						1 se	15
30	1	2	3	4	5	6						rie.	18
7	8	9	10	11	12	13							>
14	15	16	17	18	19	20	E					Pab	2
21	22	23	24	25	26	27						ŕie	14
28	29	30	31	1	2	3							>
	Ģ	•	r		3 "	(Out		Recalls	Ö	Statements	+ Notes	>

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 \blacksquare on the top-left corner, and then tap a menu item.
- Tap back 너 to return to the previous page.
- > Tap left \leq or right \geq to display the previous and next view.
- > Tap down or up to expand or collapse a section.
- Tap down v or up to expand or collapse a list.
- Tap the compose message \square button to send an email to the practice.
- Tap the book appointment $\stackrel{\text{\tiny{$1$}}}{=}$ button to book an appointment with the practice.
- Tap the send chart \square button to send your PHR.
- > Tap the renew medication $\textcircled{\otimes}$ button to renew your medication.

Index

A

Accept a Pending Appointment Request • 46 Access NextGen Patient Portal Mobile • 94 Access Statements from Inbox • 32 Account Settings • 77 Add a New Pharmacy • 73

В

Book an Appointment Online • 44

С

Cancel a Booked Appointment • 48 Cancel an Appointment Request • 47 Cancel your NextGen Patient Portal Enrollment • 81 Change NextGen Patient Portal Language • 18 Change the User • 21 Change your Forgotten Password Question • 80 Change your Password • 78 Change your Security Question • 79 Change your Username • 77 Confirm Pending Enrollment Requests • 86 Create an Appointment Request • 42

D

Delete a Pending Appointment Request • 49 Delete Inbox Items • 39 Document Revision History • 3 Download Personal Health Records as PDFs • 52 Download PHRs as C-CDA (XML) Documents • 53

Ε

Email Notifications • 8 Enroll in another Practice • 87 Enroll in NextGen Patient Portal • 9 Enroll in NextGen Patient Portal by Yourself • 15 Enroll in NextGen Patient Portal with a Token • 9 Enroll in NextGen Patient Portal with Temporary Username and Password • 12 Enroll to Practices in the same Enterprise • 86 Export an Appointment • 50

F

Features of NextGen Patient Portal • 7

Н

Health Decision Tools • 76 Health Education Materials • 74

I

Internet Security Considerations for NextGen Patient Portal • 8

L

Lab Results Not Available Within My Chart • 66 Locked Accounts • 21, 90 Log Off from NextGen Patient Portal Account • 20 Log On to your NextGen Patient Portal Account • 18

Μ

Make Payments • 62 Manage Care Manager Grants • 84 Manage Dependent Accounts • 85 Manage Practices • 86 Manage Statement Notifications • 89 My Information • 82

Ν

Navigate NextGen Patient Portal Mobile • 95 NextGen Patient Portal Mobile • 93 NextGen Patient Portal Mobile Home Page • 94 NextGen Patient Portal Session Time Out • 20 NextGen Patient Portal Web Account Access • 18

Ρ

Print Inbox Items • 39

R

Read about Your Medication • 76

Recover My NextGen Patient Portal Account • 92

Recover My NextGen Patient Portal Password • 91

Recover My NextGen Patient Portal User Name • 90

Recover your NextGen Patient Portal User Name • 22

Recovering Log On Details • 22 Renew Medications • 70 Reply to a Pending Appointment Request • 46 Reply to Messages • 35 Request Appointments • 42 Request Your Personal Health Record • 53 Reschedule a Booked Appointment • 48 Reset My Password with a Reset Token • 91 Reset your NextGen Patient Portal Password • 23 Reset Your Password with a Reset Token • 25 Reset your Password without Using Log On

Credentials • 27

S

Save Your Personal Health Records • 52 Search for a Provider and Send Your PHR to the Provider • 55 Search for Health Education Topics • 75 See Who Viewed Your Chart • 58 Send Messages • 40 Send Your PHR • 54 Send Your PHR to a DIRECT Address • 56 Send Your PHR Using an e-mail Address • 57 Settings • 77 Sorting Lab Results in the Results Section • 65 Sorting Medications in the Medications Section • 69 Submit a Form • 35 Submit an Interactive Medical Form • 37 Submit the Request • 43 Supported Browsers • 93 Supported Devices • 93 System Requirements • 93

Т

Troubleshooting • 90

U

Un-enroll from the NextGen Patient Portal • 88 Use the Symptom Checker • 75 User Grants • 83

V

View Attached Documents • 31 View Dependent Accounts • 90 View Lab Results • 67 View Lab Results Details from My Chart • 66 View Medications • 33 View Messages • 34 View Personal Health Records (PHR) • 38 View Radiology Results • 68 View Sent Items • 41 View Statements • 59 View Your Appointments from Inbox • 30 View your Last Statement • 59 View Your Messages • 29 View your Online Payments • 61 View your Statement History • 60 Viewing Appointments • 50 Viewing Lab Results on the Home Page • 65 Viewing Medications on the Home Page • 69

W

Web Browser Requirements • 7

Y

Your Appointments • 42 Your Lab Results • 65 Your Mail • 29 Your Medications • 69 Your Personal Health Records • 51 Your Statements • 59