NextGen® Patient Portal User Guide

Version 5.7

NEXTGEN

HEALTHCARE

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- NextGen® Optical Management
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The following terms may be used interchangeably throughout this document:

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

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App Version	Build Number	Date	Document Version	Summary of Changes
5.7	5.7.2.105	02/15/2013	4.0	Removed Reporting Problems and Frequently Asked Questions sections
5.7	5.7.2.105	10/29/2012	3.0	Included mobile gateway information while choosing an e-mail communication format as a text message
5.7	5.7.2.105	07/09/2012	2.0	General Release

 02/15/2013

Contents

C H A P T E R 1

Introduction

This chapter provides an overview of the NextGen® Patient Portal Web site and its requirements and other related information.

To better define products offered by NextGen Healthcare to our clients, NextMD has been rebranded as NextGen® Patient Portal. The rebranding process will span over a number of NextGen releases through a series of continued enhancements to this product. Some of the references and screen shots, both within the product and those depicted in this manual may refer to either NextMD or Patient Portal.

About This Guide

The *NextGen Patient Portal Patient User Guide* explains how to use the features and functions found on the NextGen Patient Portal Web site. It is intended for patients enrolled to use the NextGen Patient Portal Web site.

Assumptions

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

Overview

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

> Request, book and/or cancel appointments

> Receive and review documents

> View online statements

> Make online payments

> Request medication renewals

> Send and receive secure messages to and from your provider

> Complete, submit and review online forms

> Complete, submit and view Instant Medical History forms

> Request Personal Health Records (PHRs)

> Update account information

> Sign up with multiple practices

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

Web Browser Requirements

NextGen Patient Portal works best with Microsoft® Internet Explorer 6.0 and higher or Mozilla Firefox® 2.0 and higher versions with 128-bit Secure Sockets Layer (SSL) encryption.

Most browsers which are currently available support the 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 the About option. If your browser does not support 128-bit encryption, please visit the respective company Web site that provides upgrades to your browser software.

Internet Security

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

> Choose a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive, must be between 6 and 20 characters and can include numbers and characters

> Some Web browsers prompt you to save user names and passwords for various sites on the Internet. This feature can be useful, but can put your personal information at risk. If possible, you should disable this option so no one can log in as you.

> If you use a public or shared computer, it's important that you always sign out completely at the end of each session by clicking the Logout link at the top-right corner of the NextGen Patient Portal Web site. Logging out shall make it impossible for any other person (using the same system) who is trying to view the contents of your account. Wherever possible, delete the Web browser's cache and cookies. The cache maintains a copy of web pages that have been viewed recently.

> Because computers are vulnerable to viruses or online attacks that seek to intercept sensitive information provided through the Internet, your computer should have an up-to-date anti-virus program and make use of a firewall.

> You should not leave your system unattended while logged in. If you have to leave your system unattended, log out of all programs and close all windows that might display sensitive information. NextGen Patient Portal automatically logs you out if there has been no online activity for 20 minutes.

Email Notifications

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

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

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CHAPTER 2

NextGen Patient Portal Enrollment

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

Enrolling in NextGen Patient Portal

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

At the office, the practice provides you with an eight-digit token number to access your NextGen Patient Portal account, which is valid for 30 days. If you have not enrolled in NextGen Patient Portal within this period, contact your practice to obtain a new token number.

Note: If you already have a NextGen Patient Portal account and are enrolling in another practice, log in to your existing NextGen Patient Portal account and click the Manage Practices link under the My Account tab.

Note: If you already have a NextGen Patient Portal account and trying to enroll with the reset password provided by the practice, you shall be redirected to the *Password Reset* page of the NextGen Patient Portal site.

To enroll in NextGen Patient Portal:

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

Your Internet browser opens and displays the terms and conditions for using the NextGen Patient Portal Web site.

Terms and Conditions

PRIVACY
Please review our Privacy Policy, which also governs your visit to NextGen® Patient Portal (formerly known as NextMD®), to understand our practices.

ELECTRONIC COMMUNICATIONS
When you visit NextGen® Patient Portal or send e-mails to us, you are communicating with us electronically. You consent to receive communications from us electronically. We will communicate with you by e-mail or by posting notices on this site. You agree that all agreements, notices, disclosures and other communications that we provide you electronically satisfy any legal requirements that such communications be in writing.

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[I Accept]   [I Do Not Accept]   [Print]

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

Note: Clicking **I Do Not Accept** directs you to the *My Health Login* page.

The *Submit your Enrollment Validation* form displays.

Submit your enrollment validation

⚠ **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.

Please enter your security token and your email address. Your enrollment token is an eight digit number provided by your practice. Once security token and email address have been validated, you will be able to create your NextGen Patient Portal account. If you have not received an enrollment notification email, please contact your practice. Asterisk (*) denotes required field.

* Enter security token: ____-__-____
ⓘ What is security token?

* Enter email address: _____

[Submit]   [Cancel]

3   Enter your security token number (without dashes) and your email address in the fields provided and then click **Submit**.

The *Create enrollment credential form* displays.

4   In the **Create your username and password** section, type the user name and password you will use to log in to NextGen Patient Portal and then retype your password in the fields provided

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

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

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

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

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

Your *NextGen Patient Portal Account page* displays. It consists of two main elements: a navigation pane (on the left) and a contents pane (on the right).
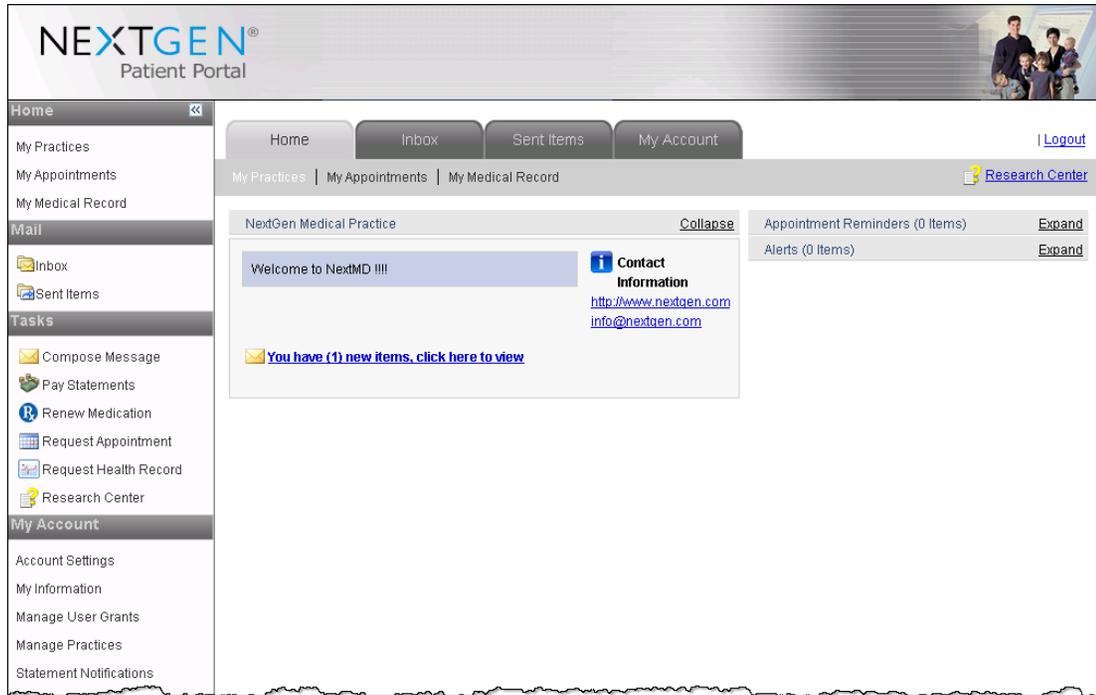
Tip: For easier access next time, add the NextGen Patient Portal Web site to your Favorites list.

C H A P T E R 3

NextGen Patient Portal Web Account Access

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

Logging In to Your NextGen Patient Portal Account

To log in to your NextGen Patient Portal account:

1 Access the NextGen Patient Portal Web site.

The *My Health Login* form displays.

2 Enter your User Name and Password in the fields provided and click Log In. Both user name and password are case sensitive.

Note: If you fail to log in to your NextGen Patient Portal account after four times with an incorrect password, the system locks your account. However, the system automatically unlocks your account after 20 minutes.

The *Answer your security question* form displays.

3   Enter the requested security information and then click Submit.

> If a practice in which you are currently enrolled decides to provide you an option to only receive online versions of your statement, the *Go Paperless!* form displays.

> To only receive online versions of your statement, click Go Paperless. Otherwise, click Decide Later.

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Your NextGen Patient Portal Account page displays. It consists of two main elements: a navigation pane (on the left) and a contents pane (on the right). Your "logged in" name appears in the upper right corner along with the last logged in time.
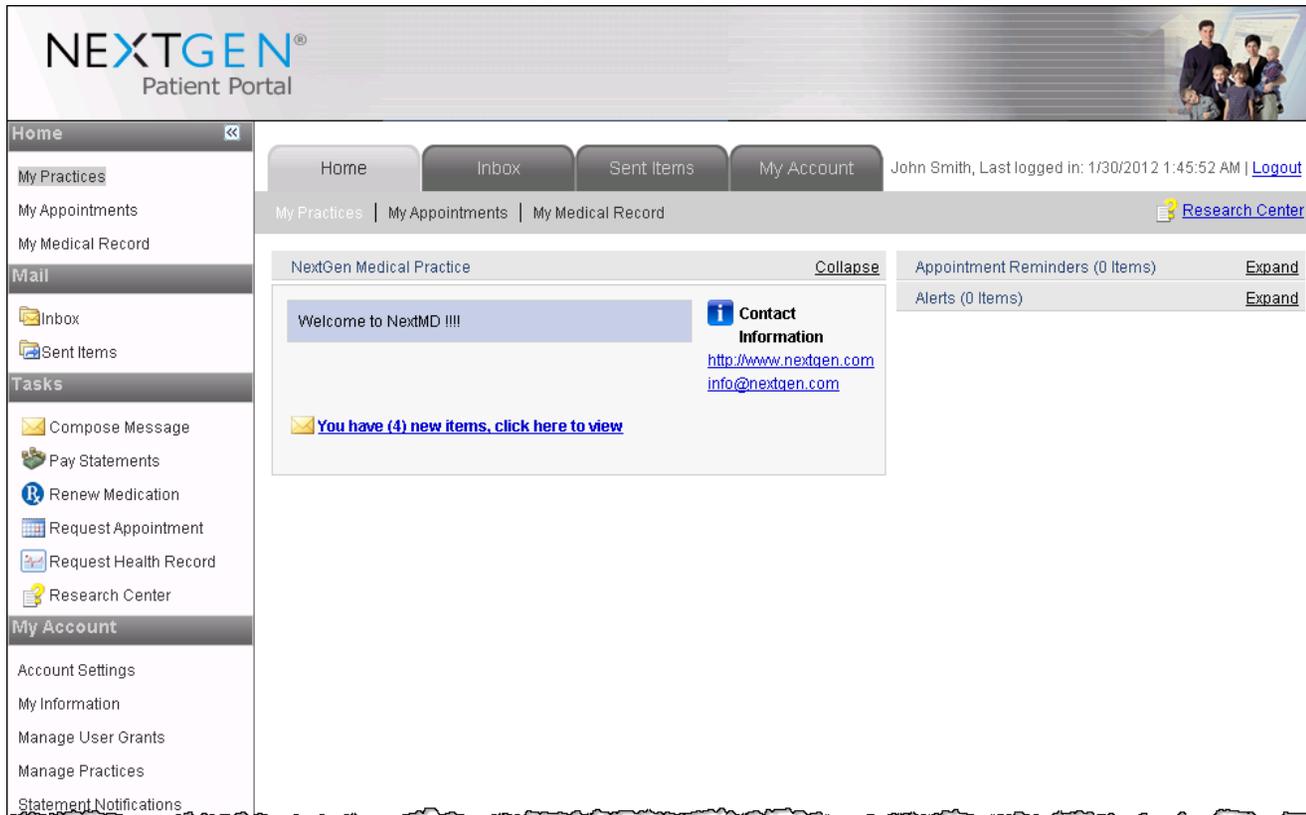
Contents Pane

The NextGen Patient Portal Web site contains a Contents pane on the right side that enables you to access all the pages in the NextGen Patient Portal Web site using the tabs and links located at the top of each page.
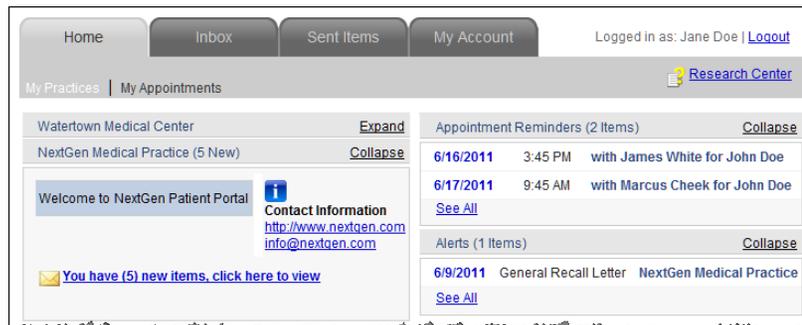
The tabs are organized into the following categories:

Home

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

Inbox

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

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

Sent Items

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

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

My Account

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

Practice Headers

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

Navigation Pane

The NextGen Patient Portal Web site contains a navigation pane on the left side that enables you to access all the pages on the Web site.
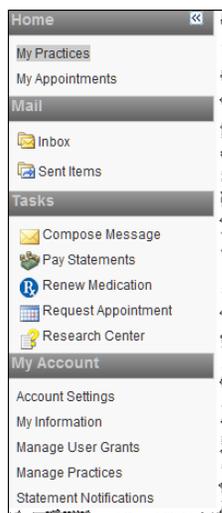
The links are grouped by functionality into the following categories:

Home

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

Mail

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

Tasks

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

My Account

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

Showing/Hiding the Navigation Pane

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

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

Icon	Function
⟫	Click this icon to show the Navigation pane
⟪	Click this icon to hide the Navigation pane

Locked Accounts

You cannot access your NextGen Patient Portal account:

> If you fail to log in to your NextGen Patient Portal account with four continuous failed attempts (with an incorrect password), the system locks your account. However, the system automatically unlocks your account after 20 minutes.

> If the practice locks your account, you receive an email stating that you need to contact the practice to unlock your account. When the practice unlocks the account, you receive another email stating that the account has been unlocked. If you try to log on to your NextGen Patient Portal account when your account is locked, you cannot access any of the mails or tasks (except for Research Center).
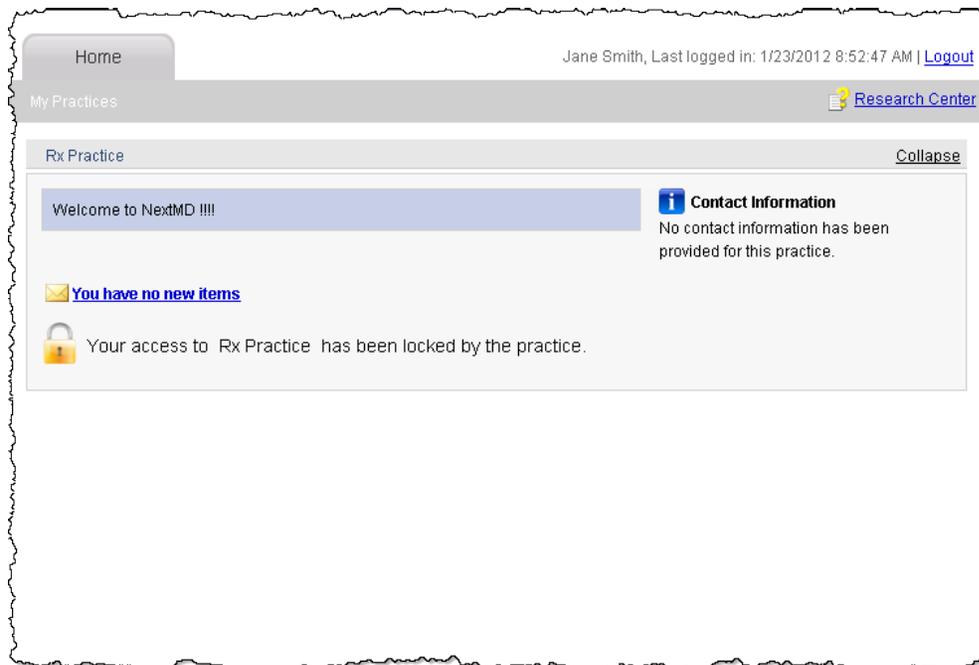
> If you cannot remember your user name and/or password, click the **Don't remember your user name or password?** and follow the instructions.

Logging Out of Your NextGen Patient Portal Account

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

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

Recommendation: NextGen recommends that you log out before exiting the NextGen Patient Portal Web site. Logging out of the Web site properly shall provide better security for you, as well as your medical records.

User Name and Password Recovery

If you cannot log on your NextGen Patient Portal account site because you forgot your user name and/or password, click the Don't remember your user name or password? link to:

> Reset your password (see "Resetting Your Password" on page 22)

> Recover a forgotten user name (see "Recovering Your User Name" on page 25)

Note: If you have already registered on the NextGen Patient Portal site and try to use the token in the *Enroll Patient (see "Enrolling in NextGen Patient Portal" on page 11)* page to register, the following message displays and on clicking Continue, you shall be redirected to *Password Reset* page in the NextGen Patient Portal site.

The security token you are using was issued by medical practice to enable a password reset process. Please continue to reset your account's credentials or cancel the operation and log in to your account.

Resetting Your Password

To reset a forgotten password:

1 Access the NextGen Patient Portal Web site.

The *My Health Login* page displays.

2 Click the Don't remember your user name or password? link.

The *Forgot your password?* form displays.

3   Enter your **User name** and click **Submit**.

Note: If you cannot remember your user name, click the **Forgot user name?** link and follow the instructions (see "Recovering Your User Name" on page 25) to obtain it.

A message displays, notifying you that an email has been sent with a link to reset your password.
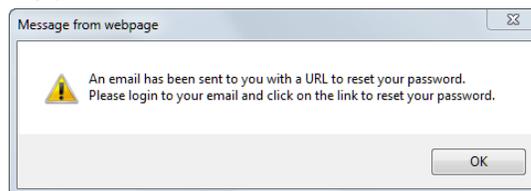
4   Click **OK** to continue.

5   In your email application, open the Password Reset email and click the **Forgot Password** link.

The *Reset login credentials* form opens and displays your user name.

6   In the **Reset your password** section, enter then retype your new **password** in the fields provided.

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

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

7   Scroll to the Reset your login security authorization section.

8   Select a security question and then enter and retype your answer in the fields provided. The question and answer is part of your login procedure to access the NextGen Patient Portal.

9   Scroll to the Reset your password recovery credentials section.

10 Enter a question and answer and then retype your answer in the fields provided to enable to you to reset your password.

11 Click Submit.

A message displays indicating that your password has been reset.
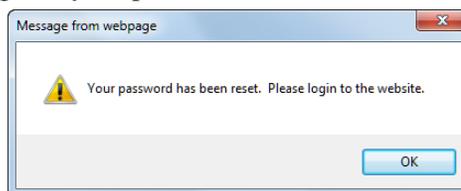
12 Click OK to continue.

The *My Health Login* page displays.

13 Log in using your user name and the new password.

Recovering Your User Name

To recover your user name:

1 Access the NextGen Patient Portal Web site.

The *My Health Login* page displays.

2 Click the **Don't remember your user name or password?** link.

The *Forgot your password?* form displays.

3 Click the **Forgot user name?** link.

The *Forgot your user name?* form displays.
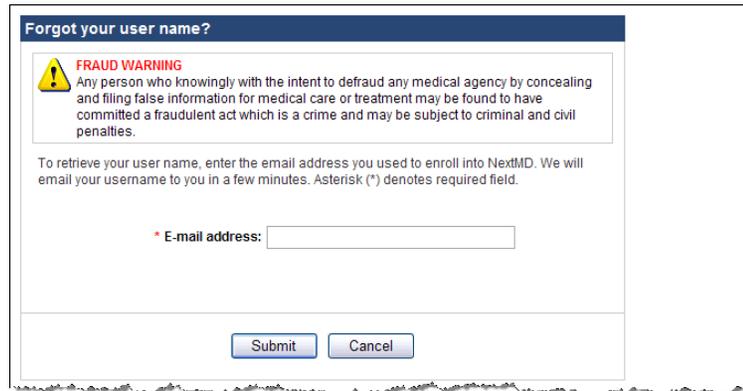
4   Enter your email address in the field provided and click Submit.

A message displays notifying you that an email has been sent to your email address with your user name.
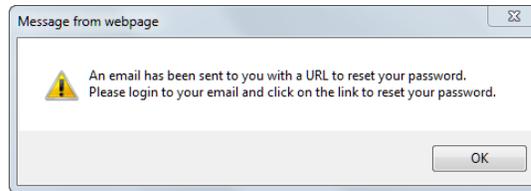
5   Click OK to continue.

6   Access the NextGen Patient Portal Web site to log in.

C H A P T E R   4

Home

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

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

Alerts and Appointment Reminders

Your practice can send you alerts and appointment reminders that appear on the **Home** page.
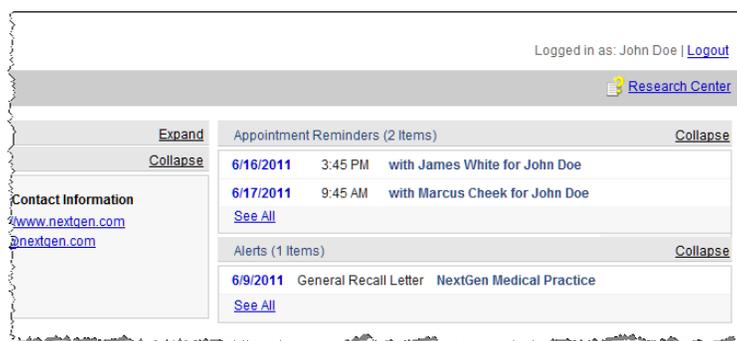
Note: If your NextGen Patient Portal Web account is locked by the practice, the appointment reminders for the corresponding practice is NOT displayed.

Appointments scheduled within the next seven days appear in the **Appointment Reminders** section. Click on a reminder to view the details. Click **See All** to view all appointments (see "Appointments" on page 50).
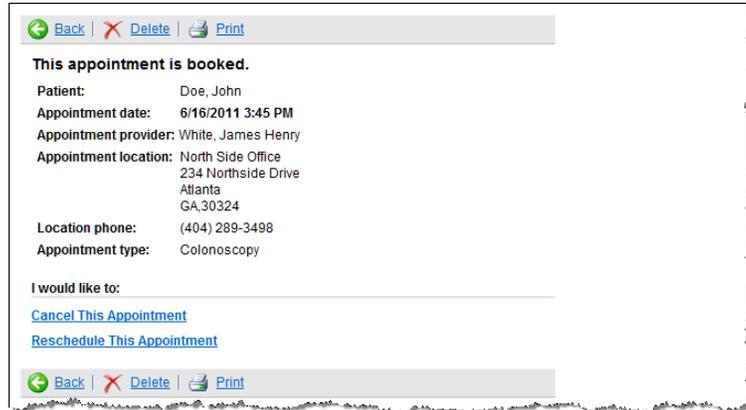
Event notices or events (such as yearly exams or upcoming lab tests) appear in the **Alerts** section. Click on an alert to view the details. Click **See All** to view all documents in the **Inbox** (see "**Accessing Inbox items**" on page 31).
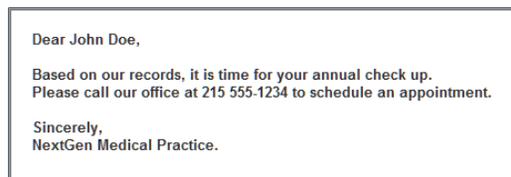
You can show or hide the **Appointment Reminders** and/or **Alerts** sections as needed by clicking the corresponding **Expand** and **Collapse** links that appear next to each header.

My Appointments

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

To use the My Appointments feature:

1 From either the Home page or navigation pane, click the My Appointments link.

A list of upcoming appointments displays by default.
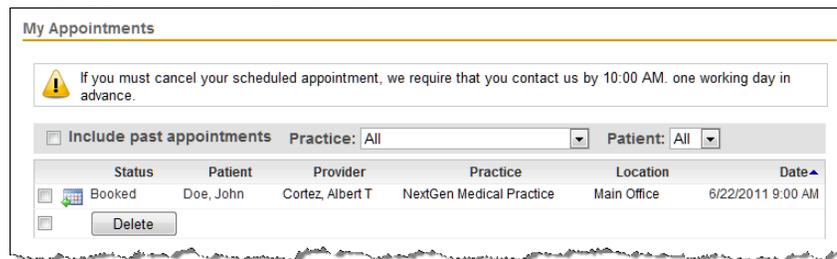
2 To refine the number of items displayed, use the Practice and Patient drop-down lists.

3 To view previous appointments, check the Include past appointments check box.

4 Click a column name (Status, Patient, Provider, etc.) to sort the list in ascending or descending order.

5 To navigate to other pages, click the page number (if available) at the bottom right of the page.

6 Click an appointment to view the details.

7 To delete appointments from the list:

> Select either the check box next to each appointment you want to remove or the select check box next to the Delete button to remove all items.

> Click Delete.

A confirmation message displays.
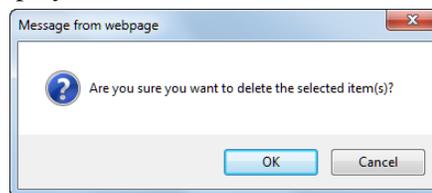
> Click OK to delete the item.

My Medical Record

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

To view and export your most recent personal health record:

1   From either the Home page or navigation pane, click the My Medical Record link.

The *Request Personal Health* form displays.

If you have not requested a health record before, you can submit a request (see "Tasks" on page 45). Otherwise, the form displays the clinical history from your last request.

2   If needed, select a person/practice from the Select Patient list.

3   Select a category in the left pane (problems, family history, etc.) to view additional information.

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C H A P T E R   5

Mail

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

Inbox

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

› Compose messages

› View and/or pay statements

› Generate Personal Health Records

› Renew medications

› Request appointments

› View health topics

Accessing Inbox items

To access Inbox items:

1 From your Home page, click the You have new items, click here to view link.

2 The number of new items appears in parenthesis.

3 You can also select the Inbox tab or click the Inbox link on the navigation pane.

4   By default all items from all practices for you and any people you are managing displays. New items appear in bold type. The total number of items in your Inbox appears on the bottom left of the page.
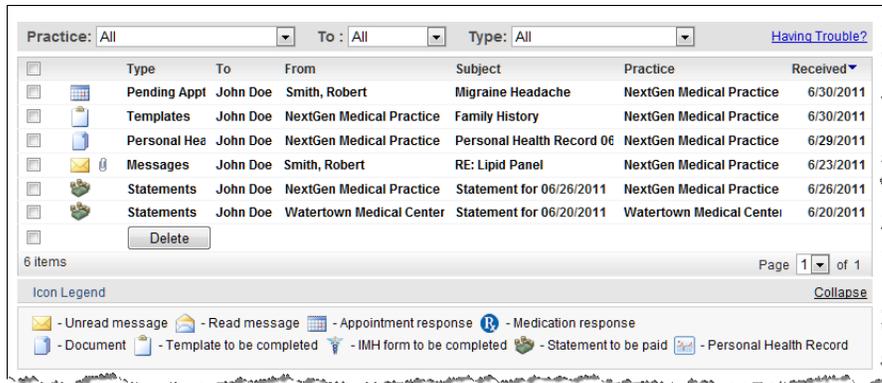
5   To refine the number of items displayed in the Inbox, use the Practice, To, and Type filters located at the top of the Inbox.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

6   Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.

7   To navigate to other pages, select the page number from the drop-down list or click the Previous or Next links on the bottom right of the page.

8   Click an item in the list to open it.

Replying to Messages

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

To reply to a message:

1   Access your Inbox (see "Accessing Inbox items" on page 31).

2   Select Messages from the Types list.

A list of messages display.
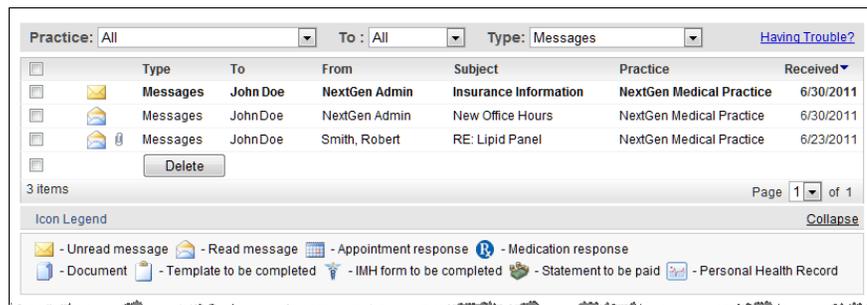
Unread messages appear in bold type.

3   Click a message to open it.

The message opens in a new window.
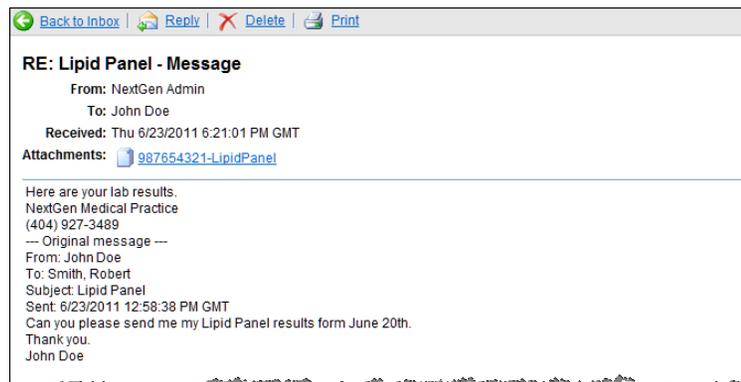
4   To view any attachments (requires Adobe Acrobat Reader), click the appropriate link in the Attachments section.

The attachment opens in a new window.
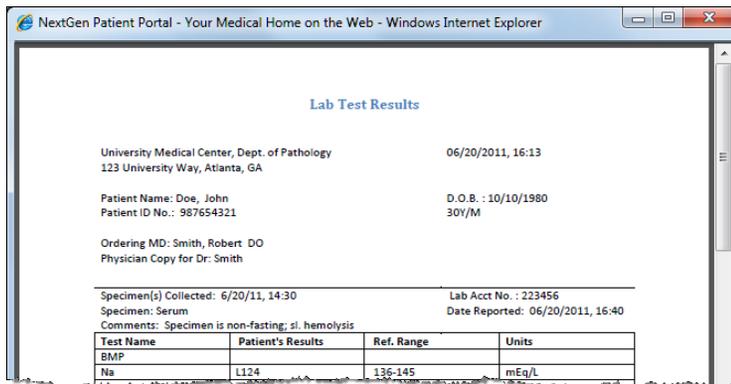
5   To enter a response, click Reply.

The message displays space above the original contents to enter your reply.
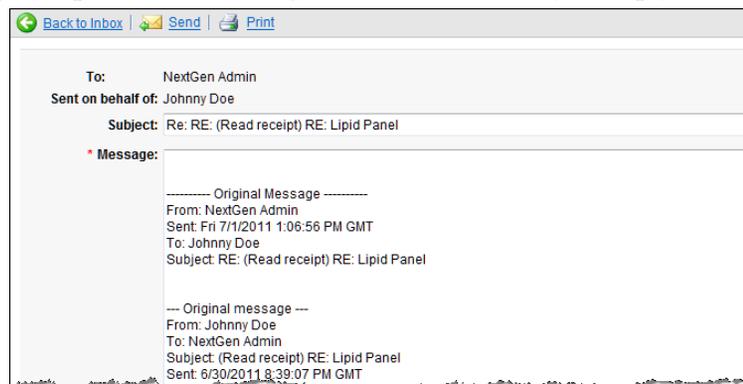
6   Type in your reply and click Send.

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

7   Close the window to return to your account.

Viewing Documents

In order to view documents sent from your practice, you must use the Adobe® Acrobat™ Reader application. If you do not have it installed in your system, you can download it from the Adobe Web site (http://get.adobe.com/reader/).

To view a document:

1   Access your Inbox (see "Accessing Inbox items" on page 31).

2   Select Documents from the Types list.

A list of document displays.
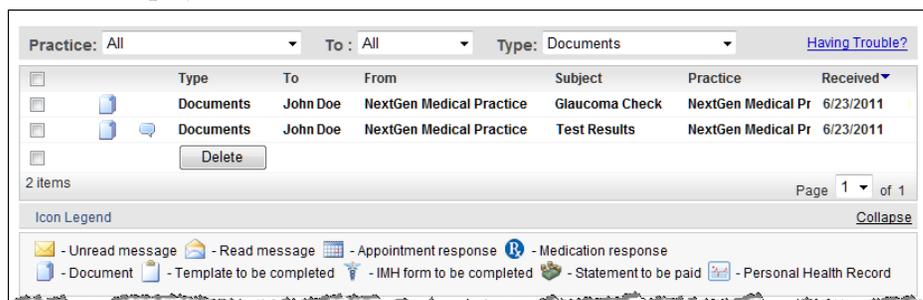
Unread documents appear in bold type.

3 To view comments sent from the practice regarding the document click the **Balloon** 💬 icon.

4 Click a document to view it.

Notes: Depending on your operating system, computer settings, and Adobe Acrobat Reader settings, you may be prompted to download the file before viewing it. In some cases, Web browser settings or pop-up blocker applications can prevent documents from opening. Refer to the appropriate operating system, Adobe Acrobat Reader, browser or pop-up blocker documentation for more information.
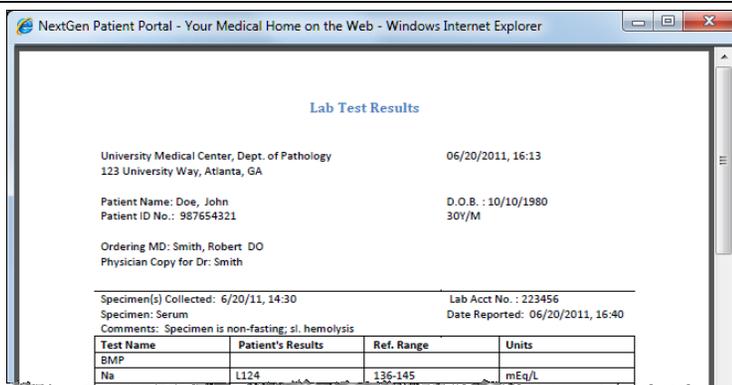
Note: If the document has been recalled by the practice staff, you can see a message indicating that the document has been recalled by practice staff and actual contents are not displayed. The message displayed depends on the configuration done in **File Maintenance** > *Online Practice Settings* window.

Viewing Personal Health Records

When you receive a personal health record in your Inbox, you can view it, print it, or save it.

To view your personal health record:

1   Access your Inbox (see "Accessing Inbox items" on page 31).

2   Select Personal Health Records from the Types list.

A list of personal health records displays.
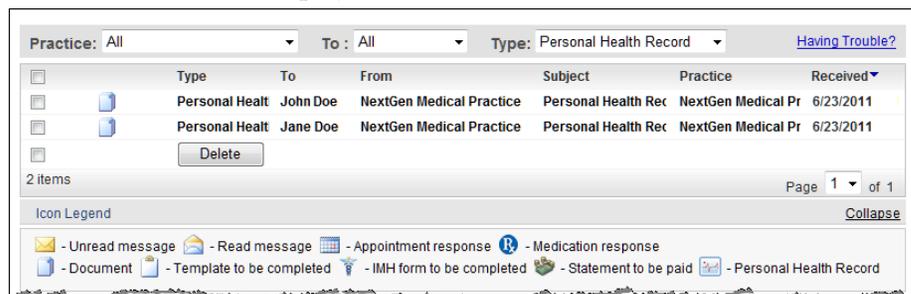
Unread records appear in bold type.

3   Click a record to view it.
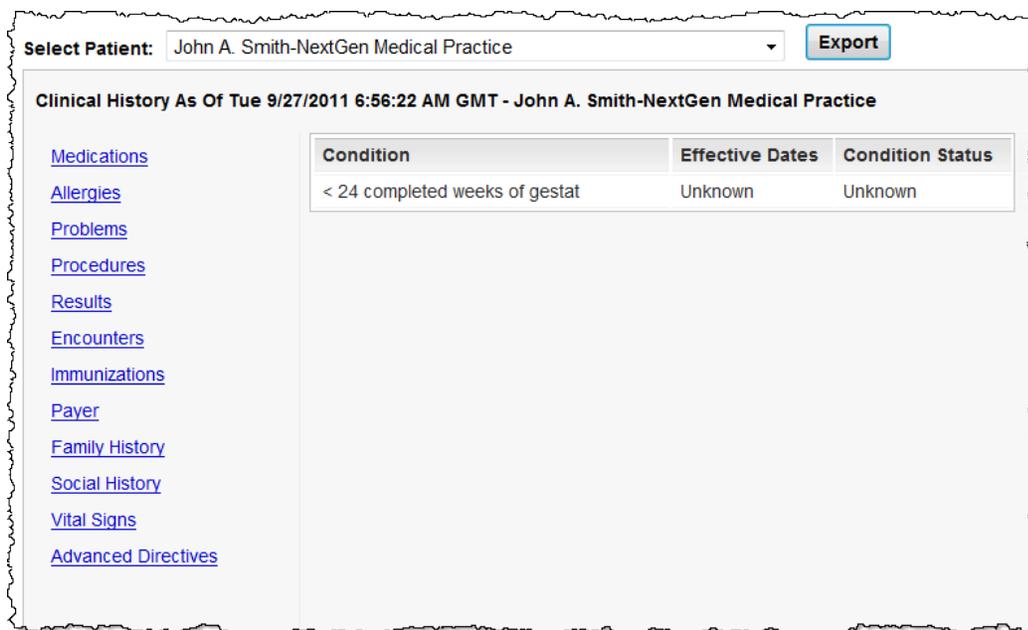
4   Select a category (such as problems or procedures) on the left to view additional information.

5   To save the record as a PDF file (requires Adobe Acrobat Reader to view):

> Click Save.

The *File Download* dialog box displays.
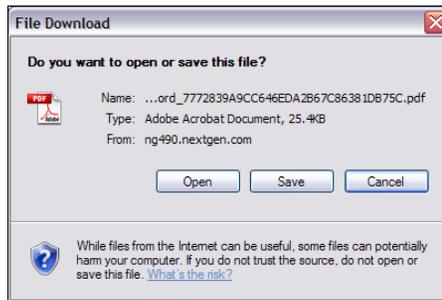
> Click Save.

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

The Save As dialog box displays.
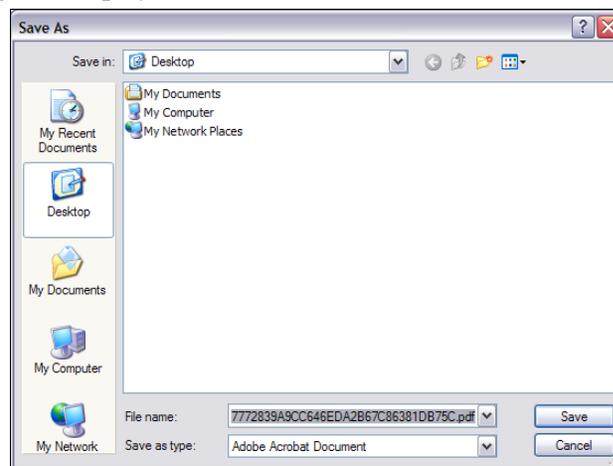
> If needed, select a location, enter a filename and click Save.

6 To print the record:

> Click Print.
> Select a printer.

The *Print* dialog box displays.
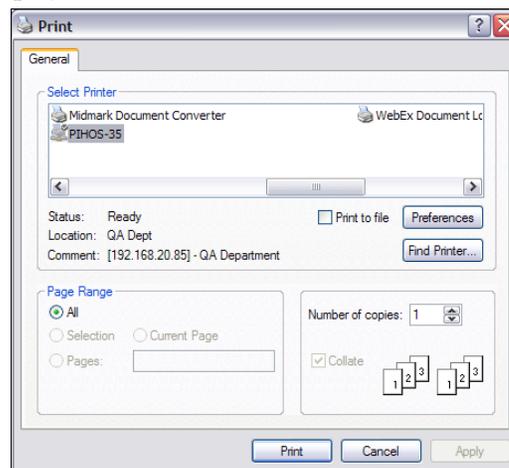
> Click Print.

Submitting a Template

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

To submit a template:

1   Access your Inbox (see "Accessing Inbox items" on page 31),

2   Select Templates from the Types list.
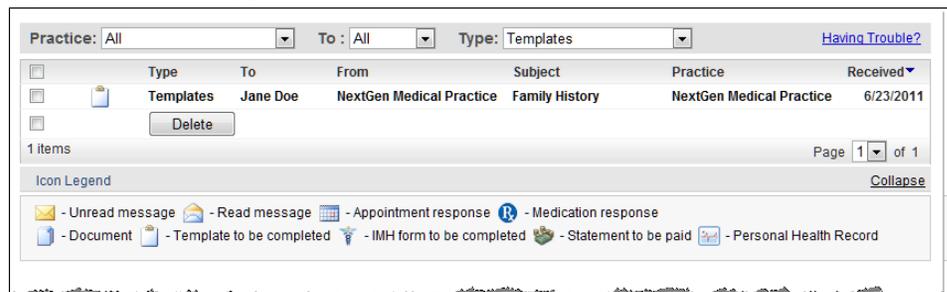
Unread templates appear in bold type.

3   Click a template to open it.

The template opens in a new window.
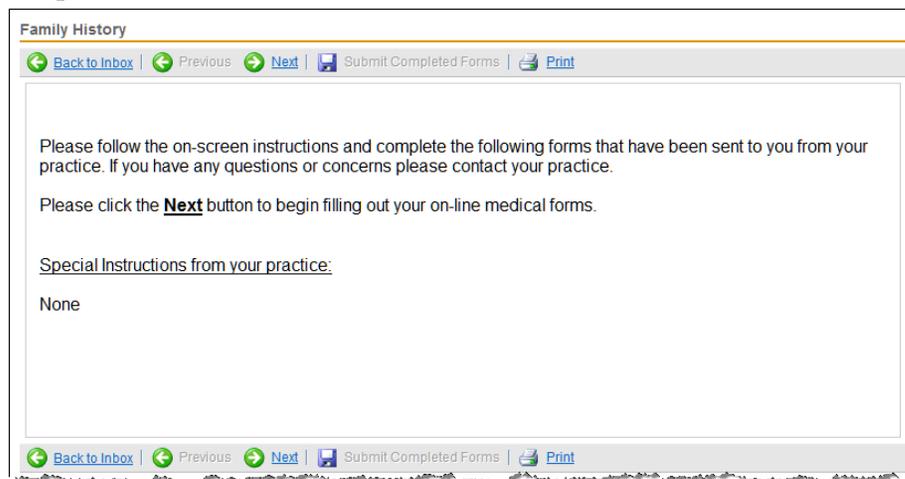
The first page of the form includes instructions for completing it.

4   Read the instructions and click the Next button.

The next page of the template displays.

5 Fill out the template as instructed.

6 To print out the displayed page of the template, click the Print button.

7 To proceed to the next page, click the Next button. To go back to the previous page, click the Previous button.

8 After you have completed the template, click the Submit Completed Forms button.

A message indicating that your information has been submitted to your practice for review displays.

9 Click the Close button to return to the list of templates.

Your copy of the submitted form moves to Sent Items.

Submitting an Interactive Medical Form

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

To submit an interactive medical form:

1 Access your Inbox (see "Accessing Inbox items" on page 31).

2 Select Interactive Medical Forms from the Types list.

A list of interactive medical forms displays.

The Unread forms appear in bold font face.

3   Click a form to open it.

The form opens in a new window.

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

5   To print out the displayed page of the template, click the Print button.

6   To proceed to the next question, click the Next button. To return to the previous question, click the Back button.

7   To save your answers and return to the list of forms, click the Save and Close button.

When you reach the end of the form, the summary displays.

8   Review your answers and either:
   › Click Start Over to get back and start from the first question
   › Click Print to print out your answers
   › Click Back to Inbox to go back to Inbox page.

9   Once you have completed your form, click the Submit button to send the form to the practice.

A message indicating that your information has been submitted to your practice for review displays.

10 Click Back to Inbox to return to the mail box page.

Your copy of the submitted form moves to Sent Items.

Deleting Inbox Items

To delete one or more items from the Inbox:

1   Access your Inbox (see "Accessing Inbox items" on page 31).

By default all items from all practices for you and any people you are managing displays.

2   To refine the number of items displayed, use the Practice, To, and Type filters located at the top of the Inbox.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

3   Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.

4   To navigate to other pages, select the page number from the list or click the Previous or Next links on the bottom right of the page.

5   Either select the check box next to each item you want to remove or select the check box next to the Delete button to remove all items.

6   Click Delete.

A confirmation message displays.

7   Click OK to delete the item.

Sent Items

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

›   Compose messages

›   View and/or pay statements

›   Generate Personal Health Records

›   Renew medications

›   Request appointments

›   Research health topics

Accessing Sent Items

To access sent items:

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

By default all sent items from all practices for you and any people you are managing displays. The total number of items appears on the bottom left of the page.
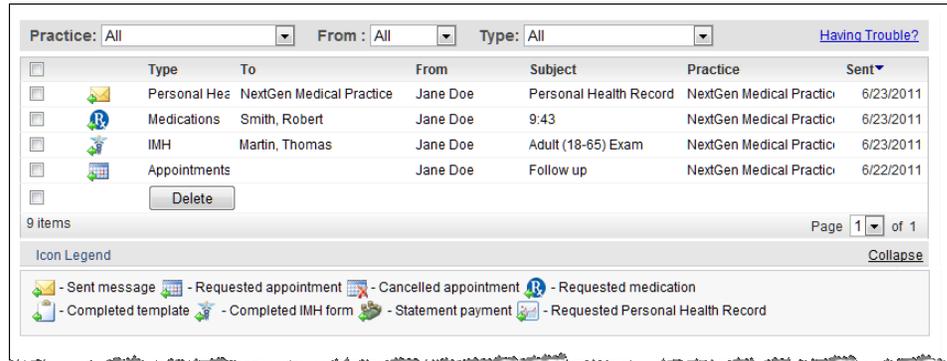
2   To refine the number of sent items displayed, use the Practice, To, and Type filters located above the list of sent items.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

3   Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.

4   To navigate to other pages, select the page number from the list or click the Previous or Next links on the bottom right of the page.

5   Click an item in the list to open it.

Deleting Sent Items

To delete one or more sent item:

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

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

2   To refine the number of items displayed, use the Practice, To, and Type filters located above the list of sent items.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

3   Click a column name (Type, To, From, etc.) to sort the list in ascending or descending order.

4   To navigate to other pages, select the page number from the list or click the Previous or Next links on the bottom right of the page.

5   Either select the check box next to each item you want to remove or select the check box next to the Delete button to remove all items.

6   Click Delete.

A confirmation message displays.

7   Click OK to delete the item.

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 02/15/2013

C H A P T E R   6

Tasks

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

Composing Messages

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

To compose a message:

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

The *Compose Message* form displays.

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

3   If you are managing other people's accounts, select the Patient on whose behalf you are making the request.

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

> ❯   Select the type of message you are sending from the Category list.

Note: Categories are specific to each practice and may vary based on your selection.

> Select the recipient of the message from the To list.
> Type the Subject of the message in the corresponding field.
> Type your Message in the corresponding field.

5   Click Submit.

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

Viewing Statements

To view a statement:

1   From the Inbox tab or the navigation pane, click the View Statements link.

If your practice accepts electronic payments through the NextGen Patient Portal Web site, click the Pay Statements link.

The current amount due and a list of your statements displays.
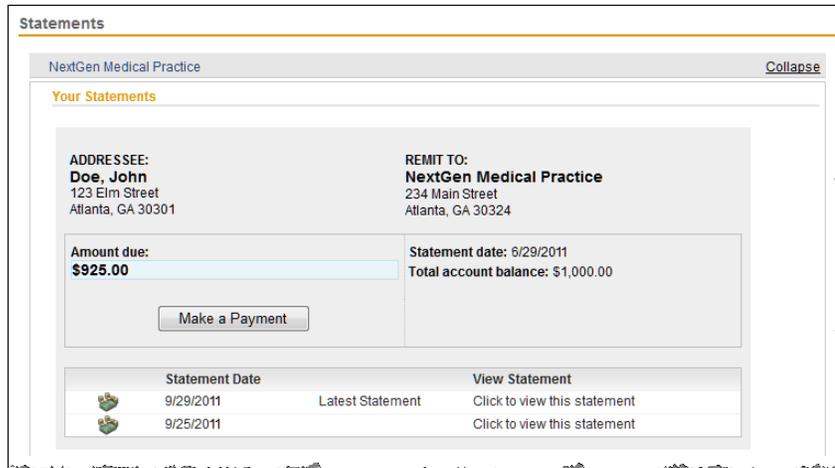
2   To view a statement for a particular date, click the corresponding click to view this statement link.
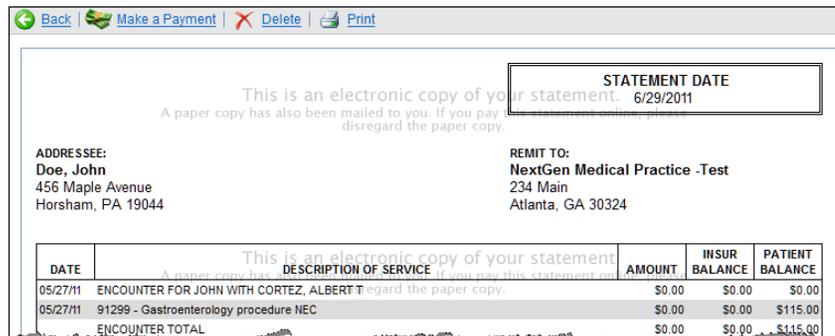
3   To print the statement, click Print

4   To return to the statement list, click Close.

5 If your practice accepts electronic payments, click Make a Payment (see "Making Payments" on page 47).

Making Payments

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

To make payments:

1 From the Inbox tab, Sent Items tab or the navigation pane, click the Pay Statements link.

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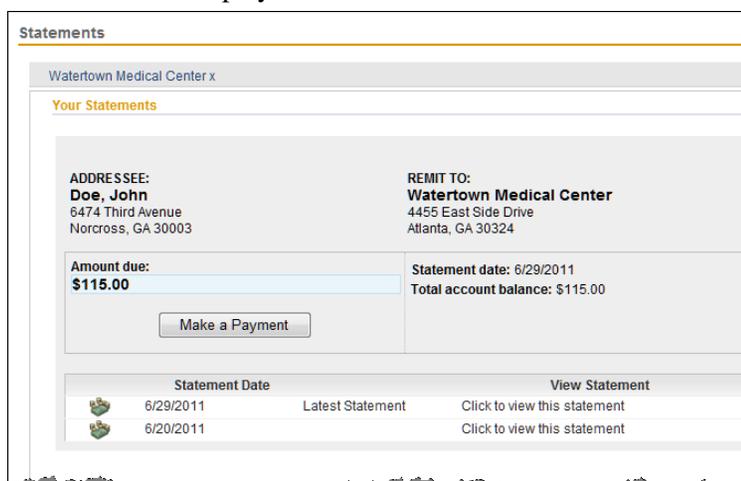
2 To view a statement for a specific date, click the corresponding click to view this statement link. Otherwise proceed to the next step to make a payment.

The selected detailed statement displays.
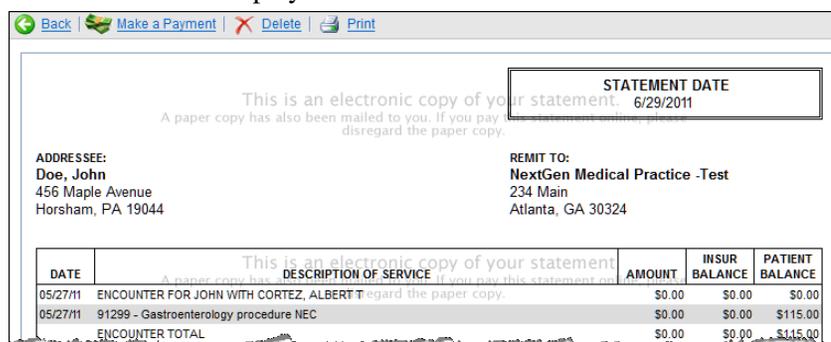
3 Click Make a Payment.

The *Make a Payment form* displays

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

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

5   By default, the system displays the logged in user's first and last name in the **Cardholder's name** fields. If this name is different than the name that appears on your credit card or account, update the first and last name fields accordingly.

6   For **Credit Card Payments**, enter or select the following information:
   > Credit Card Number
   > Expiration Date
   > CVV2

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

For **eCHECK Payments**, enter or select the following information:
   > Routing number
   > Account number
   > Bank account type (Checking or Savings)

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

7   Choose either Pay Total Due or Pay Other Amount

When choosing Pay Other Amount, enter the payment amount.

All amounts displayed are in US dollars.

8   If the Billing Address is different than the one displayed, select Enter a different billing address and then enter the information in the fields below (all fields are required).

9   Click Submit.

After successfully processing your payment, the system displays your payment receipt, places a copy of the payment in the Sent Items folder, and sends an email to notify you that your payment was delivered to practice.
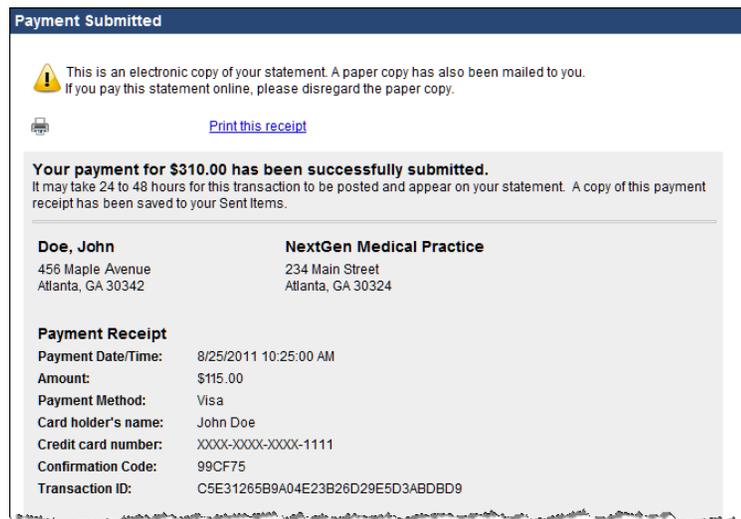
Note: It may take 24 to 48 hours for this transaction to be posted and appear on your statement.

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

Requesting Personal Health Records

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

To request a personal health record:

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

The *Request Personal Health Record* form displays.

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

3   If you are managing other people's accounts, select the Patient on whose behalf you are making the request.

4   Click Submit.

A message that your request has been successfully submitted displays. When the health record is sent to you, it shows up as a new item in your Inbox.

5   Click on the record to view it or go to your Home page and select the My Medical Record link.

The active medications are displayed on the top part of the page and they are listed in the reverse chronological order (with the most recent items at the top).

Appointments

Depending on how your practice processes appointments, you can complete an appointment request, submit it and wait for a response from the practice or schedule your own appointments.

Starting an Appointment Request

Use the following procedure to begin an appointment request. Depending on how your practice processes appointments, After completing this section you can either submit the request and wait for a response or book your own appointment. These options are determined by your practice. A red asterisk next to a field name indicates a required entry.

To start an appointment request:

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

The *Appointment Request* form displays.

2   If you are enrolled in multiple practices, select the Practice from the corresponding list.

3   If you are managing other people's accounts, select the Patient on whose behalf you are making the request.

4   Scroll to the Select Provider and Location section and complete as follows:

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

The hours of operations display when you select a location.

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

> If needed, click the Map ⚙ icon to view the address information for a selected location in a new window.
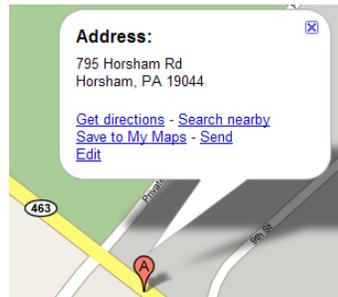
5   Depending on how your practice process appointments, either submit (see "Submitting an Appointment Request" on page 52) the request and wait for a response from the practice or book (see "Booking an Appointment Request" on page 53) your own appointment.

Submitting an Appointment Request

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

To submit an appointment request:

1   Complete Sections 1 and 2 of the Appointment Request form. (see "Starting an Appointment Request" on page 51)

2   Scroll to the 3) Submit Request section.

3   Enter or select the following information:

- › Reason for appointment: Enter the reason for the appointment.
- › Priority: Choose the level of urgency (Low, Normal, or High).
- › Make appointment for: Choose the time frame for your appointment, such as next week or next month.
- › Preferred date/time: Choose a time within the hours of operation (displayed beneath the selected location) and then check a corresponding box for the day when you would like to schedule the appointment.
- › Alternate date/time: If available, choose an alternate day and time when you would like to schedule the appointment if the preferred time is not available and then check a corresponding box for the day when you would like to schedule the appointment.

4   Click Submit.

A message indicating that your appointment request has been successfully submitted displays.

5   When the practice responds to your request, it sends an email notifying you to log on to your account to review the appointment request response.

6   Open the request response to see if the appointment was booked or is pending (see "Responding to an Appointment Request" on page 55).

7   If the suggested time is not suitable, you need to either cancel (see "Cancelling a Booked Appointment" on page 59) or reschedule (see "Rescheduling a Booked Appointment" on page 58) the appointment and then create a new request.

Booking an Appointment Request

Use the following procedure to interactively book your own appointments (if allowed by your practice).

To book an appointment request:

1   Complete Sections 1 and 2 of the Appointment Request form (see "Starting an Appointment Request" on page 51).

2   Scroll to the 3) Submit Request section.

3   Enter or select the following information:

> Reason for appointment: Enter the reason for the appointment.

> Priority: Choose the level of urgency (Low, Normal, or High).

> Make appointment for: Choose the time frame for your appointment, such as this week, next week, or next month.

> Preferred date/time: Choose a time within the hours of operation (displayed beneath the selected location) and then check a corresponding box for the day when you would like to schedule the appointment.

4   Click Search.

NextGen Patient Portal displays the first five available appointments.

---

5   Select an appointment from the list.

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

	Provider/Group	Location	Date
○	Robert Smith DO	795 Horsham Road Horsham PA 19044	9/16/2011 9:30 A.M.
○	Robert Smith DO	795 Horsham Road Horsham PA 19044	9/16/2011 11:00 A.M.
○	Robert Smith DO	795 Horsham Road Horsham PA 19044	9/16/2011 11:15 A.M.
○	Robert Smith DO	795 Horsham Road Horsham PA 19044	9/16/2011 11:30 A.M.
○	Robert Smith DO	795 Horsham Road Horsham PA 19044	9/19/2011 9:30 A.M.

Back to first available   Next available >>

[Book Appointment]

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.

There is no available appointment time slots returned for your search. Please adjust your search criteria and try again or send this request to your doctor using the "Submit Request" button.

[Search]   [Submit Request]

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

The details of the appointment display.

Appointment Request

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

Your appointment is booked

You can find all of your appointments in My Appointments page.

◀ Make another appointment   🖶 Print for your records

Patient:	Doe, John
Appointment date:	**9/15/2011 11:30:00 AM**
Appointment provider:	Robert Smith, DO
Appointment location:	Main Office
	795 Horsham Road
	Horsham
	PA, 19044
Location phone:	(215) 795-0101
Appointment type:	ECG
Appointment Instructions:	

7   If needed, you can click the corresponding links to **make another appointment** or **print the appointment details**.

Responding to an Appointment Request

When you receive a pending appointment from a practice, it means that further action is required on your part to complete the request.

To respond to a pending appointment request:

1   From the Inbox tab, open a pending appointment.

The *Appointment Request* form displays.

2   To accept the appointment:

> Click Accept.

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

3   To request a new appointment:

> Click New.

The *Request New Appointment* form displays:

> Enter the reason for the new appointment and click **Send.**

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

> Click the **Request Appointment** link to submit a new request.

4 To cancel the appointment:

> Click **Cancel Appt Request.**

A confirmation message displays.

> Click **OK.**

5 To delete the appointment:

> Click **Delete.**

A confirmation message displays.

> Click **OK.**

6 To print out the appointment:

> Click **Print.**

A new window containing your request details opens followed by the *Print* dialog box.
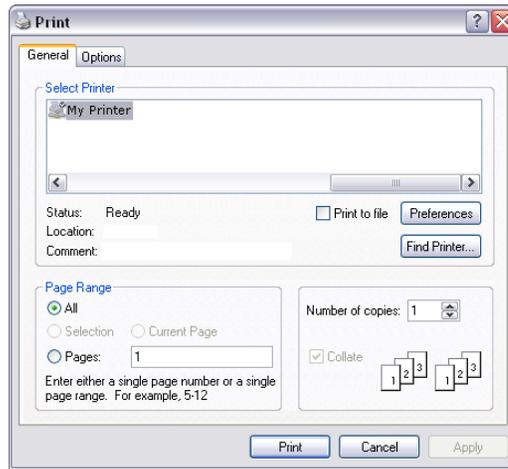
> ❭ If needed, select a printer and click **Print**.

7   To exit the *Appointment Response* form, click the **Back to Inbox** button.

Rescheduling a Booked Appointment

If you have privileges, you can reschedule a booked appointment.

To reschedule a booked appointment:

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

The *Appointment Detail* form displays.

2 Click Rescheduled Appointment.

A drop down list of reasons to reschedule displays.
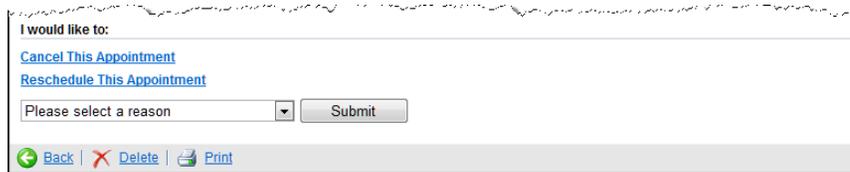
3 Select a Reason and click Submit.

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

4 You can now start a new appointment request (see "Starting an Appointment Request" on page 51).

Cancelling a Booked Appointment

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

To cancel an appointment:

1   From either the Inbox or, the My Appointments link, open a booked appointment.

The *Appointment Detail* form displays.

2   Click Cancel Appointment.

A drop down list of reasons to cancel displays.
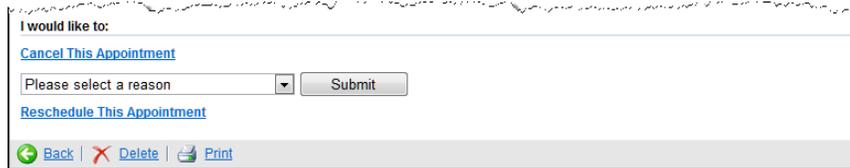
3   Select a Reason and click Submit.

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

Renewing Medications

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

To renew your medication(s):

1   Select your medical practice (see "Selecting Your Medical Practice" on page 60).

2   Select your medication(s) (see "Renewing Medications" on page 60).

3   Select your pharmacy (see "Selecting Your Pharmacy" on page 63).

4   Submit your renewal request (see "Submitting Your Request" on page 65).

Selecting Your Medical Practice

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

To select your medical practice:

1   From the Inbox tab, Sent Items tab or the navigation pane, click the Renew Medications link.

The *Renew Medications* form displays.

2   Scroll to the Select Your Medical Practice section.

Renew Medications

1) Select Your Medical Practice

Select the medical practice that prescribed the medication you wish to renew.

*Practice: NextGen Medical Practice

*Patient: Self

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

3   If you are enrolled in multiple practices, select the Practice you want to renew your medication from the corresponding list.

4   If you are managing other people's accounts, select the Patient on whose behalf you are making the request.

5   You can now select your medication(s) (see "Renewing Medications" on page 60).

Selecting Your Medication

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

To select your medication:

1   After selecting your practice (see "Selecting Your Medical Practice" on page 60), scroll to the Select Medications section.

A list of medications available for renewal display.

2) Select Medications

Select the medical practice that prescribed the medication you wish to renew.

Selected Medication(s):

TYLENOL (ACETAMINOPHEN) 12 * 325MG TABLET 8/4/2009 - 8/5/2009

Select different medications

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

A list of alternative display.

3   To **display inactive medications that may be available for renewal**, select the corresponding check box.

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

4   Select the check box next to all medication(s) you want to renew.

5   Select the **Yes, I would like to request the above inactive medication** check box to confirm.

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

6   To make any changes repeat Steps 1 through 4.

7   Click the **Select** button.

8   You can now select your pharmacy (see "Selecting Your Pharmacy" on page 63).

Selecting Your Pharmacy

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

To select a pharmacy:

1   After selecting your medication, scroll down to the Select Pharmacy section.

Your preferred pharmacy displays.

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

A search form displays.

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

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

The top 100 pharmacies that meet the search criteria display.

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

5 Click the button next the pharmacy's name to select it.

6 If the pharmacy you want to use does not appear, click Add New (at the top of the form).

The *Add New Pharmacy* form displays.

7 Enter the requested information and click Save.

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

The pharmacy that was just added displays at the top of the list. A Modify Pharmacy 📝 icon appears next to the entry.
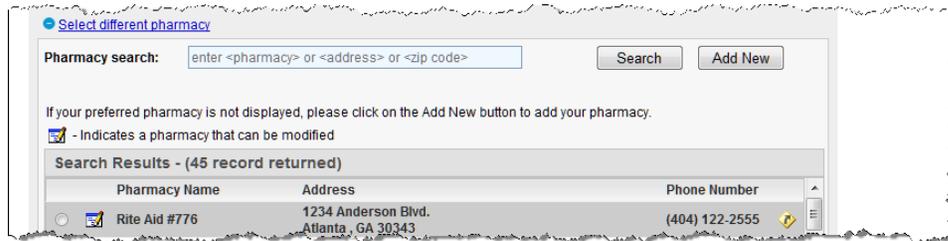
8 To change information about the pharmacy you just created, click it.

9 To set the selected pharmacy as your preferred NextGen Patient Portal pharmacy that displays each time you renew medications for the selected practice, select the corresponding check box.

10 You can now submit your renewal request (see "Submitting Your Request" on page 65).

Submitting Your Request

1 In the Submit Renewal section:

> Select the Reason (which appears in the Subject field of your request) for the renewal.
> Select the Person to whom you are sending the medication renewal
> Enter the reason for the prescription renewal in the Comments field.

2 Click Submit to complete the process.

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

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

Research Center

Use the Research Center link to view the Healthwise® Health Information Knowledgebase, an online health encyclopedia.

To access the Healthwise® Knowledgebase:

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

The *Healthwise Knowledgebase Home* page displays.
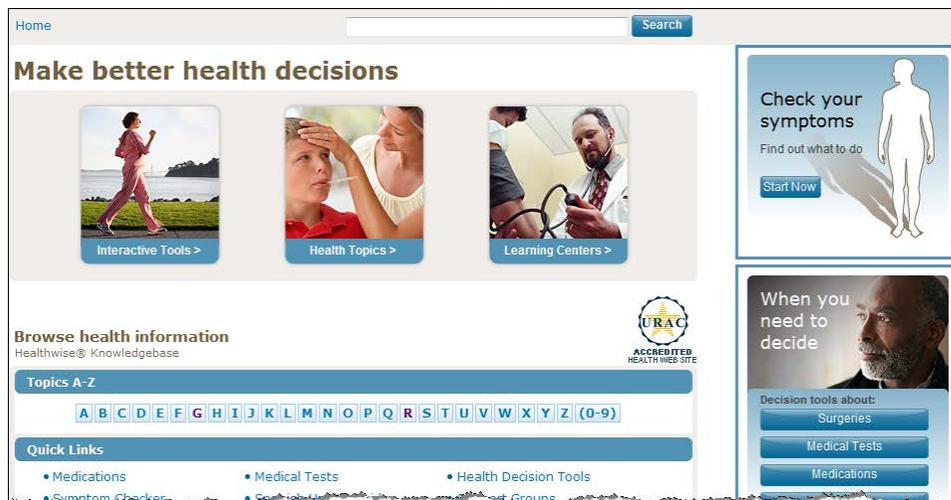
2   From this page you can:

›   Perform a Search: The search function enables you to research health topics.

If you received a Healthwise Patient Instruction handout at the office, you can enter the code number at the bottom of the page in the Search field to view that topic or other related topics.

While the Patient Instruction handout covers high level topics and provides clear instructions (such as "What to do after your visit for Heart Disease"), the Knowledgebase provides additional detail about the condition and covers other relevant topics to educate you.
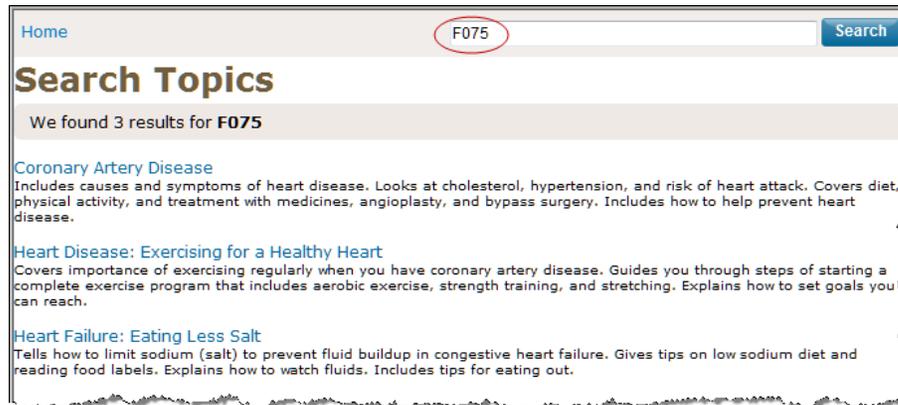
In the case of F075 to address "A Healthy Heart: After Your Visit," the Knowledgebase addresses what Heart Disease is, how to treat it, lifestyle changes to improve the condition, classes of medicines to be taken, procedures that can be performed, etc.

> **Use Interactive Tools**: The interactive tools in the Healthwise Knowledgebase provide you with tailored health information just by answering a few questions about your health. You can assess your risk for a heart attack, learn what contributes to stress, or even calculate the calories you burn during a particular activity. Links to these interactive tools appear throughout relevant topics and in the Health Tools section of topics.

> **View Health Topics**: With more than 8,000 topics on health conditions, medical tests and procedures, medications, and everyday health and wellness issues, the Healthwise Knowledgebase helps you become informed about your health to enhance partnerships with your doctors for better health decisions.

> **Access Learning Centers**: Use this feature to learn about medical conditions, how the body works, and other health-related topics.

> **Check Your Symptoms**: This interactive tool enables you to pick an area of the body, select your symptoms, and view related topics.

> **Access Decision Tools**: Decision Points are designed to guide you through key health decisions (such as surgeries, medical tests, medicines, and health issues), combining medical information with your personal values to make a health decision right for you.

> **Browse Health Information**: This option allows you to search for topics and content alphabetically by entering the first letter of the topic or condition. A list of relevant topics displays if you are unsure of the exact topic name.

> **Use Quick Links**: The Quick Links option provides short cuts to information on medications, medical tests, health decision tools, and the symptom checker and support groups. It also provides a link to a Spanish Health Guide.

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 02/15/2013

C H A P T E R   7

My Account

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

Account Settings

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

Changing Your User Name

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

To change your user name:

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

The *Account Settings* page displays.

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

The User Name section expands.

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

All fields are required. User names are case sensitive and must be between 6 and 20 characters.

4   Enter your current password in the field provided.

5   Click Submit.

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

Changing Your Password

You can change your password used to log on the NextGen Patient Portal Web site that was provided while you registered in NextGen Patient Portal when required.

To change your password:

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

The *Account Settings* page displays.

2   In the Password section, click the Edit link.

The Password section expands.

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

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

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

4 Enter your current password in the field provided.

5 Click Submit.

A message that your password has been updated displays.

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

Changing Your Security Question

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

To change your security question:

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

The *Account Settings* page displays.

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

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

3   Select a new question from the list.

4   Enter and confirm your new answer in the fields provided.

Note: All fields are required.

5   Enter your current password in the field provided.

6   Click Submit.

A message that your security question has been updated displays.

Changing Your Forgotten Password Question

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

To change your forgotten password question:

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

The *Account Settings* page displays.

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

The Forgot Password section expands and displays your current question.

3 Enter and confirm a new question to help you remember your password in the fields provided.

4 Enter and confirm a new answer to your new question in the fields provided.

5 Click Submit.

The message that your forgotten password question has been updated displays.

Un-enrolling from the NextGen Patient Portal

You can un-enroll from the NextGen Patient Portal when required.

To un-enroll from the NextGen Patient Portal:

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

Note: You van also un-enroll from the Manage Practices (see "Un-enrolling from the NextGen Patient Portal" on page 86) tab.

The *Account Settings* page displays.

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

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

3   Select the Reason you are un-enrolling from the corresponding list.

4   Click Un-enroll.

A confirmation message displays.
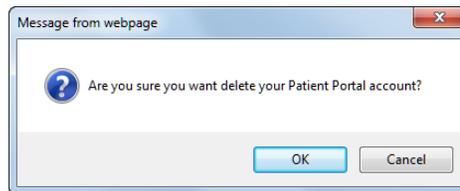
5   Click OK to delete your NextGen Patient Portal account.

My Information

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

Updating Your Name and Date of Birth

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

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

To update your name and date of birth:

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

    Information about your account displays.

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

    Your name and date of birth fields display.

3   Make the changes as needed.

4   If needed, click the Calendar 🔳 icon to select a date.

5   Click Update.

    A message that your information has been updated displays.

Managing Your Addresses

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

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

To manage your mailing addresses:

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

Information about your account displays.

2   Scroll down to the Addresses section.

3   To add a new address:

> Click the Add link.

A blank address form displays.

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

A message that your address has been added displays.

4   To update an address:

> Click the Edit link next to the address you want to change.

Information about the selected address displays.

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

A message that your address has been updated displays.

5 To delete a mailing address:

> Click the Edit link next to the address you want to change.

Information about the selected address displays.

> Click Delete.

A confirmation message displays.
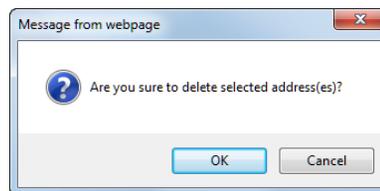
> Click OK.

A message that your address has been deleted displays.

Managing Your E-mail Addresses

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

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

To manage your e-mail addresses:

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

The information about your account displays.

My Information	
The information on this screen is used by the portal only. The changes are not sent to the practice.	
John Jay, Doe 10/10/1980	Edit
Addresses	Add
123 Elm Street , Atlanta GA 30301	Edit
E-mail Address	Add
jjdoe123@email.com	Edit
Phone	Add
(404) 555-3455	Edit

2   Scroll to the E-mail Address section.

3   To add another e-mail address:

›   Click the Add link.

A blank e-mail address form displays.

E-mail Address	Add
*E-mail Address	
Format: E-mail HTML	
☐ Receive notifications at this e-mail address	
[Add]	
jjdoe123@email.com	Edit

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

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

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

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

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

> From the **Format** list, select how the e-mail appears on your screen:

> > **E-mail HTML**: Displays text formatting, bullets, numbers, pictures, etc.

> > **E-mail Text**: Displays only un-formatted text

> > **Text Message**: Displays abbreviated messages (approximately 200 characters) for mobile devices

> Check the **Receive notifications at this e-mail address box** if you want NextGen Patient Portal to send notifications to this e-mail address.

> Click **Add**.

> A message displays that your e-mail has been added.

4   To update an e-mail address:

> Click the **Edit** link next to the e-mail you want to change.

> Information about the selected e-mail displays.

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

> Click **Update**.

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

5   To delete an e-mail address:

> Click the **Edit** link next to the e-mail you want to change.

> Information about the selected e-mail displays

> Click **Delete**.

> A confirmation message displays.

> Click **OK**.

Managing Your Phone Numbers

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

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

To manage your phone numbers:

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

Information about your account displays.

2 Scroll to the Phone section.

3 To add another phone number:

> Click the Add link.

A blank phone number form displays.

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

A message that your phone number has been added displays.

4 To update a phone number:

> Click the Edit link next to the phone number you want to change.

Information about the selected phone number displays.

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

A message that your phone number has been updated displays.

5 To delete a phone number:

> Click the **Edit** link next to the phone number you want to change.

The information about the selected phone displays.

> Click **Delete**.

A confirmation message displays.
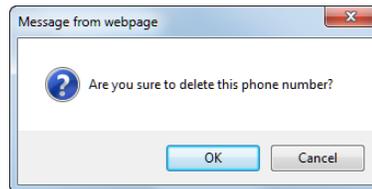
A message that your phone number has been deleted displays.

Managing User Grants

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

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

Managing Care Manager Accounts

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

To manage people managing your account:

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

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

Manage User Grants	
Who Manages My Account?	
John Doe - NextGen Medical Practice	Edit
Accounts I Manage	
Mary Doe - NextGen Medical Practice	Edit

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

Manage User Grants			
Who Manages My Account?			
John Doe - NextGen Medical Practice			Hide
Practice: NextGen Medical Practice		Expiration Date:	
☑ Allow full access on my account		Why are the check boxes disabled?	
Module		**View**	**Send/Complete**
Appointments		☑	☑
Documents		☑	☑
Statements		☑	☑
Medications		☑	☑
Messages		☑	☑
Templates		☑	☑
Instant Medical History		☑	☑
PHR		☑	☑

Access expires: ○ [   ] 📅
◉ Never expires

[Submit] [Cancel] [Delete]

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

3 To set individual view and access rights:

> Clear the Allow full access to my account check box.

> In the View column, select the check box next to each module that to enable the person managing your account to view related information. For example, open and read documents.

> In Send/Complete column, select the check box next to each module that to enable the person managing your account to perform a related action. For example, make and confirm appointment requests.

4 To set an expiration date when the selected person can no longer manage your account:

> Click the button next to "Access expires."

> Click the Calendar ▦ icon to select the date.

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

5   To remove a care manager from your account:

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

> Click Delete.

A confirmation message displays.
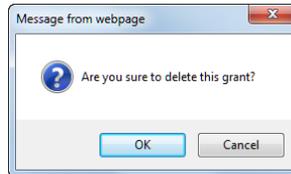
> Click OK.

Managing Dependent Accounts

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

To remove a dependent from your account:

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

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

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

3   Click Delete.

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

A confirmation message displays.
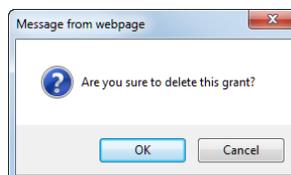
4   Click OK.

Managing Practices

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

Enrolling in Another Practice

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

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

To set up an account with another practice:

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

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

2 Enter the Security Token number (without dashes) provided by the additional practice and your email address in the fields provided (both fields are required).

3 Click Submit.

Upon successful enrollment a confirmation message displays.

4 Click OK to continue.

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

Un-enrolling from the NextGen Patient Portal

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

To un-enroll from the NextGen Patient Portal:

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

> Note: You van also un-enroll from the Account Settings (see "Un-enrolling from the NextGen Patient Portal" on page 73) tab.

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

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

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

3   Select the Reason you are un-enrolling from the corresponding list.

4   Click Un-enroll.

A confirmation message displays.

5   Click OK to delete your NextGen Patient Portal account.

Managing Statement Notifications

If enabled by your practice, you can choose to receive your statements online through the NextGen Patient Portal only or to receive both electronic and paper statements.

To manage your statement notifications:

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

The *Go Paperless!* form displays.

2   If you want to receive online statements only for all practices that provide this service, select the Receive only electronic statements check box.

If you want to receive both electronic and paper statements for all practices that provide this service, clear the Receive only electronic statements check box.

If you are enrolled in multiple practices that provide this service and want to select different options for each practice, select or clear the corresponding check box as needed.

3   Click Submit.

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