



# User Guide

## for NextGen<sup>®</sup> Enterprise Patient Portal 5.0

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## CHAPTER 1

# *Features of NextGen Enterprise Patient Portal*

NextGen® Enterprise 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 Enterprise Patient Portal, some of the features listed and described throughout this document may not be available on your NextGen Enterprise Patient Portal account.

## Web Browser Requirements

NextGen Enterprise Patient Portal works best with the following:

- Microsoft® Internet Explorer® 11.0 or later

If you are using Internet Explorer 11.0 or later in the compatibility mode, few pages may not load correctly. You can remove the NextGen Enterprise Patient Portal link from the compatibility mode to load the pages correctly.

To remove the NextGen Enterprise Patient Portal link, open Internet Explorer and press **Alt**. Click **Tools > Compatibility View Settings**. Under **Website you've added to Compatibility View**, select the NextGen Enterprise Patient Portal link. Click **Remove** and clear the **Display intranet sites in Compatibility View** check box. Click **Close**. Re-open your browser.

- Microsoft Edge
- Mozilla® Firefox® 54.0 or later
- Google Chrome™ 59.0 browser or later
- Opera®
- Safari® 9.1 or later
- Android™ 4.0 or later or Apple® iOS 7.1 or later (for the mobile version)


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 select **About**. If your browser does not support 128-bit SSL encryption, visit the respective company website and upgrade.

## Internet Security Considerations for NextGen Enterprise Patient Portal

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

- Never save usernames 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.
- Select the five login security questions from the list and type your answers. All the security questions must be different. The security questions and answers are important to protect your confidential medical information and your account related security.
- 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 Enterprise 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.


## ***Username and Password Policy***

In NextGen Enterprise Patient Portal, the username and password policy has been updated for the following pages:

- Enrollment
- Logon
- Account Settings

The username and password policies are as following:

- Your username must be unique. You must provide a username in between 6 to 50 characters and it can be a combination of alpha-numeric and special characters (except any whitespace as character). The user name is not case sensitive.
- You must choose a password that is easy to remember but difficult for others to guess. The password must be in between 8 to 200 characters. The password must be a combination of upper or lower case letters, numbers, and special characters. You should not use commonly used passwords such as *password* or *password1*. To get the mostly used password details, visit the [list of most common passwords](#) page. If the password meets the password policy, then the corresponding ✕ marks for each criterion will change to ✓ mark.


 **Note:** The new username and password policy also applies to the mobile version of NextGen Enterprise Patient Portal.


## ***Email Notifications***

You can receive an email notification:

- When you receive any correspondence from the practice, such as appointments, documents, statements, medications, messages, templates, interactive medical forms, and personal health record.
- When your practice locks or unlocks your accounts.
- When you change your username, password, security questions and answers, or an account email address.

For a message with multiple attachments, you receive a notification for the message only after all the attachments linked to the message are processed. If the list of attachments has a web form, you receive a separate notification for the webform. The notification email has the webform link that is active only for fourteen calendar days from the date of receiving the email. The webform link does not appear for care managers who have **View Access** and **No Access** rights on their dependent's records.

 **CAUTION:** The webform opened from the notification email does not have a session timeout. It is recommended that you do not leave your system unattended while filling the webform.

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

## CHAPTER 2

# Enroll in NextGen Enterprise Patient Portal


Use the following information to determine the relevant enrollment method in NextGen Enterprise Patient Portal.


If you	Do this
Have a token from your practice	<a href="#">Enroll Using a Token (on page 11)</a>
Have received an enrollment link through email invitation from your practice	<a href="#">Enroll Using an Invitation Link (on page 18)</a>
Have received a temporary username and password from your practice to log on to NextGen Enterprise Patient Portal	<a href="#">Enroll Using Temporary Username and Password (on page 16)</a>
Have received a NextGen Enterprise Patient Portal website link from your practice for self-enrollment	<a href="#">Self-Enroll for NextGen Enterprise Patient Portal Account (on page 19)</a>

## Enroll Using a Token

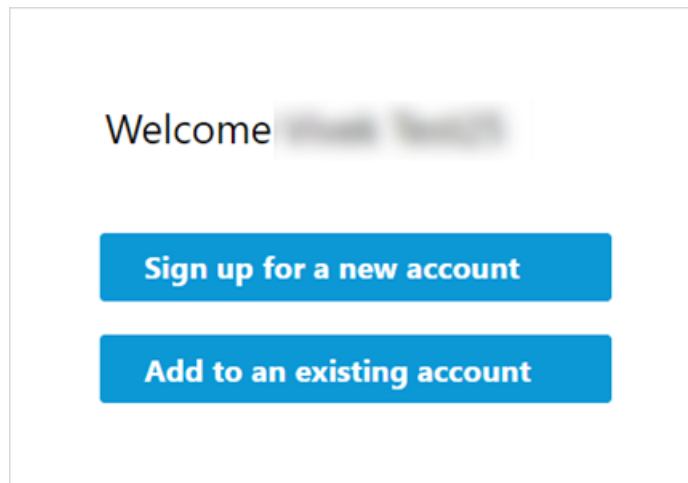
If you have received a token from your practice, follow the instructions in this section to complete the enrollment.

- On the logon page, click **Create Account**.  
The **Terms and Conditions** page opens.
- Read the terms and conditions and click **I Accept**.  
The **New to Patient Portal** page opens.
- Click **I have an enrollment token**.  
The **Token details** page opens.
- On the **Token details** page, under **Enter token details**, do the following:
  - Type the token number that you have received from your practice.
  - Type your date of birth in mm/dd/yyyy format.
  - Type your last name.
  - Type your email address. Adding an email address will help you to reset your password or recover your account when required.  
This email address is considered as [your account email address \(on page 16\)](#). If you add your email address, then after the enrollment completion, you will receive an email notification states that you have completed the NextGen Enterprise Patient Portal enrollment process successfully. Open the email and verify your email address.

 **Note:** If you do not wish to provide your email address, select **I do not wish to provide an email address**. Then the **Email address** field will not be available.
- Click **Next**.

 **Note:** If your email address is already associated with an existing account, you will be redirected to the **Account credentials** page. If you see a message that says your email address is already associated with another account, probably you already have a NextGen Enterprise Patient Portal account using the same email address. You can either add or append the practice to your existing account or you can type a new email address to create a new account. For more information, see the [Email Address Associated with an Existing Account \(on page 21\)](#) section.

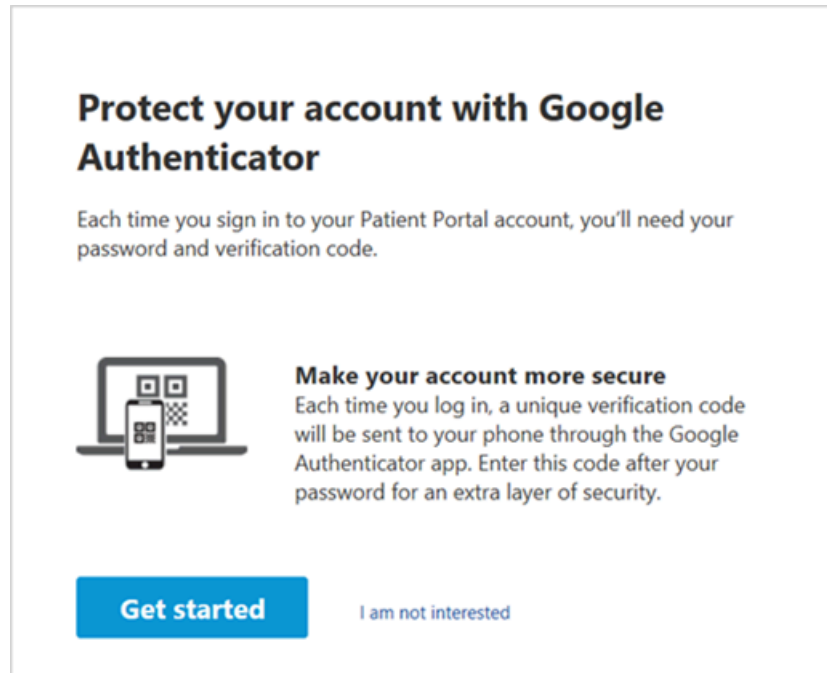
The **Account options** opens.



6. On the **Account options** page, do one of the following:
  - If you are new to NextGen Enterprise Patient Portal, click **Sign up for a new account**.
  - If you have already enrolled in NextGen Enterprise Patient Portal and you want to add another practice to your existing account, click [Add to an existing account. \(on page 12\)](#)

## **Add to an Existing Account**

1. On the **Account credentials** page, under **Verify your account**, type the username and password for your existing account, and click **Next**.  
If you have already enabled two-step verification using Google Authenticator earlier, you will be redirected to NextGen Enterprise Patient Portal home page. Otherwise, the **Google Authenticator** page opens.



2. On the **Google Authenticator** page, do one of the following:

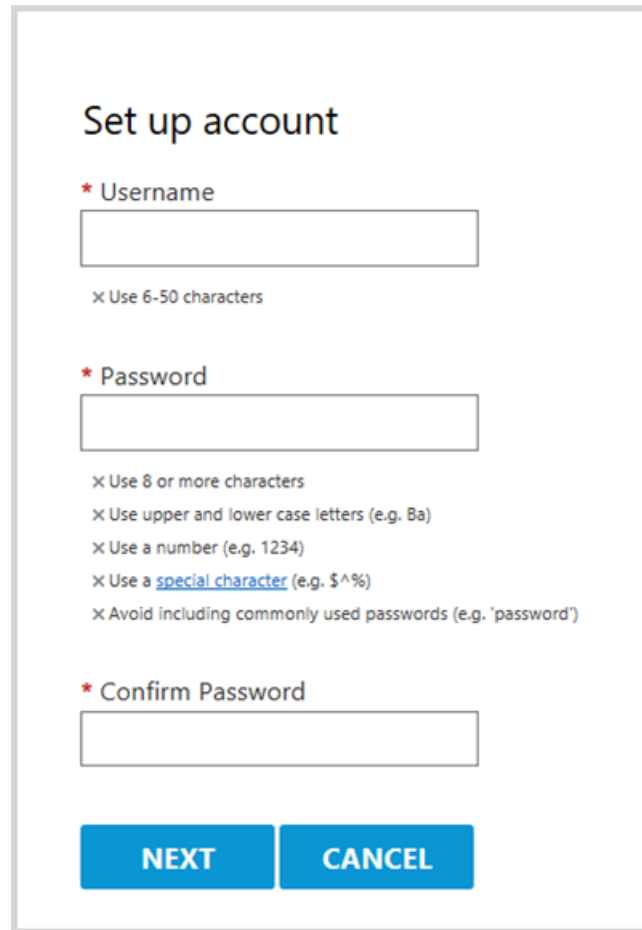
- To set up Google authentication for your NextGen Enterprise Patient Portal account, click [Get started \(on page 15\)](#).
- If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click **I am not interested**.

 **Note:** If you have enrolled without setting up Google Authenticator, you can set it up from home page . From the home page, click **Settings > Account Settings > Google Authenticator**.

## Create a New Account

1. On the **Account credentials** page, under **Set up account**, do the following:

- a. In **Username**, type your username.
- b. In **Password**, type your password.  
For more information about the latest user name and password policies, see the [Username and Password Policy \(on page 9\)](#) section.
- c. In **Confirm Password**, re-type your password.



The image shows a 'Set up account' form. It has a title 'Set up account' at the top. Below the title are three required fields: 'Username', 'Password', and 'Confirm Password'. Each field has a red asterisk icon to its left. The 'Username' field has a hint below it: '× Use 6-50 characters'. The 'Password' field has four hints below it: '× Use 8 or more characters', '× Use upper and lower case letters (e.g. Ba)', '× Use a number (e.g. 1234)', and '× Use a special character (e.g. \$^%)'. The 'Confirm Password' field has no hints. At the bottom of the form are two blue buttons: 'NEXT' and 'CANCEL'.

Set up account

\* Username

× Use 6-50 characters

\* Password

× Use 8 or more characters

× Use upper and lower case letters (e.g. Ba)

× Use a number (e.g. 1234)

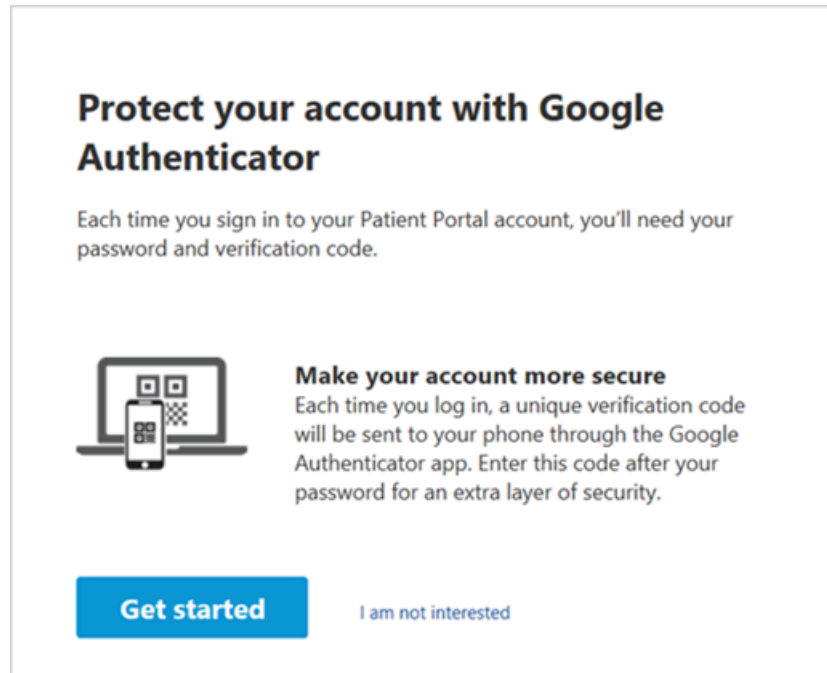
× Use a [special character](#) (e.g. \$^%)

× Avoid including commonly used passwords (e.g. 'password')

\* Confirm Password

NEXT CANCEL

2. Click **Next**.  
The **Security questions** page opens.
3. Under **Set up security questions**, select all five security questions and type the answers. Make a note of the security questions and associated answers for account recovery in future.
4. Click **Submit**.  
The **Google Authenticator** page opens.




5. On the **Google Authenticator** page, do one of the following:

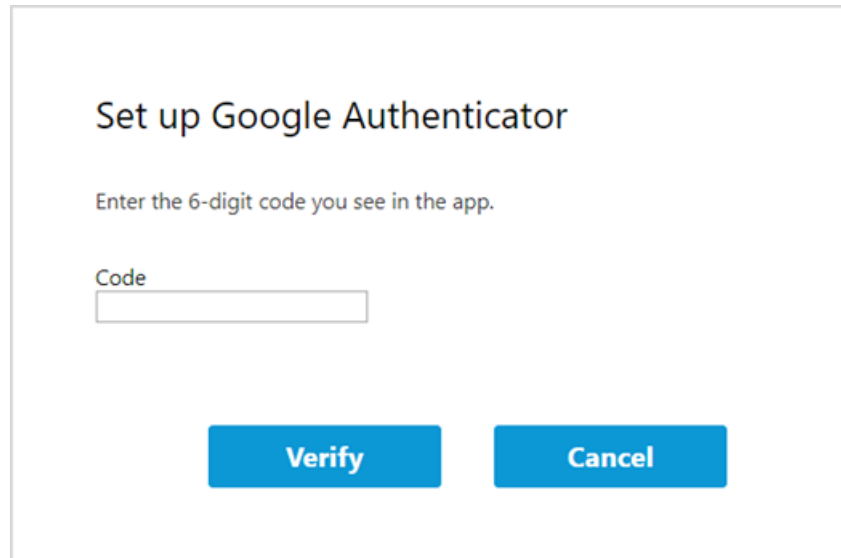
- To set up Google authentication for your NextGen Enterprise Patient Portal account, click [Get Started \(on page 15\)](#).
- If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click **I am not interested**.

 **Note:** If you have enrolled without setting up Google Authenticator, you can set it up from **Home page > Settings > Account Settings > Google Authenticator**.

## *Use Google Authenticator to Secure your Account*

1. Under **Get codes from Google Authenticator** do one of the following:
  - If you are an Android user, click **I have an Android phone**.
  - If you are an iPhone user, click **I have an iPhone**.
2. Point your Android phone or iPhone at the QR code to scan and verify Google Authenticator's connections with your account and click **Next**.  
You will receive a six-digit authentication code.

 **Note:** Whenever you log on to NextGen Enterprise Patient Portal account you have connected with Google Authenticator mobile application, you must type a six-digit verification code. If you open the Google Authenticator mobile application, it will generate a new random code each time for you to use.



Set up Google Authenticator

Enter the 6-digit code you see in the app.

Code


Verify Cancel

3. Type the verification code and click **Verify**.

The NextGen Enterprise Patient Portal home page opens.

## ***Add a Unique Account Email Address during Enrollment***

In NextGen Enterprise Patient Portal, you can associate a unique email address with your account. This is to prevent associating multiple accounts with the same email address. It also provides you with a secure way to reset password or recover your account with minimal support. It is recommended that you add an account email address and verify that email address.

 **Note:** From home page, you can view your unique account email address by clicking **Settings** > **Account Settings** > **Account Email**. You can set your unique account email address as preferred notification email method. In future, you can update your account email address, if required.

## ***Enroll Using Temporary Username and Password***

If your practice has provided you a temporary username and password, you can log on to NextGen Enterprise Patient Portal and activate your account.

1. On the logon page, click **Create Account**.  
The **Terms and Conditions** page opens.
2. Read the terms and conditions and click **I Accept**.  
The **New to Patient Portal** page opens.
3. Click **I have a temporary username and password**.  
The **Temporary username and password** page opens.
4. On the **Temporary username and password** page, under **Enter temporary username and password**, do the following:
  - a. Type the temporary username provided by the practice.
  - b. Type the temporary password provided by the practice.

5. Click **Next**.

The **Account credentials** page opens.

6. On the **Account credentials** page, under **Set up account**, do the following:

- a. In **Username**, type your username.
- b. In **Password**, type your password.
- c. In **Confirm Password**, re-type the password.

For more information about the latest username and password policies, see the [Username and Password Policy \(on page 9\)](#) section.

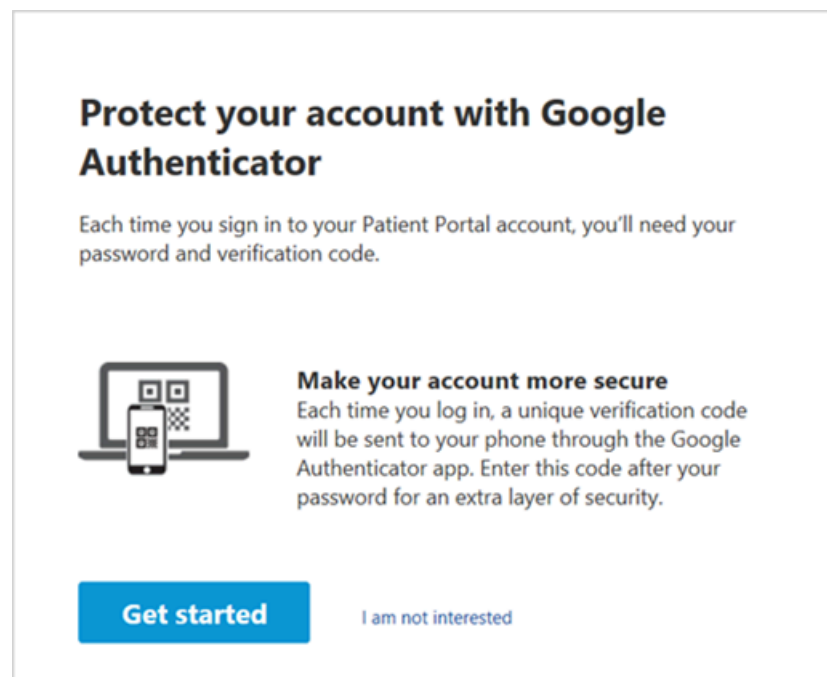
7. Click **Next**.

The **Security questions** page opens.

8. Under **Set up security questions**, select all five security questions and type the answers. Make a note of the security questions and associated answers for account recovery in future.


9. Click **Submit**.

The **Google Authenticator** page opens.



10. In the **Google Authenticator** page, do one of the following:

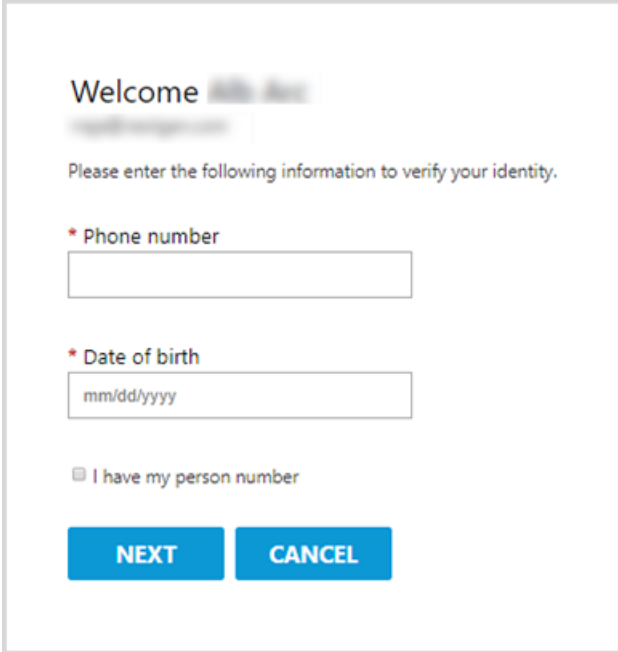
- To set up Google authentication for your NextGen Enterprise Patient Portal account, click **Get started**, and do the following:
  - If you are an Android user, click **I have an Android phone**; if you are an iPhone user, click **I have an iPhone**.
  - Point your Android phone or iPhone at the QR code to scan and verify Google Authenticator's connections with your account and click **Next**. You will receive a six-digit authentication code.
  - Type the verification code and click **Verify** to access the NextGen Enterprise Patient Portal home page.
- If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click **I am not interested**, and click **Continue** to access NextGen Enterprise Patient Portal home page.

 **Note:** If you have enrolled without setting up Google Authenticator, you can set it up from the home page. From your home page, click **Settings > Account Settings > Google Authenticator**.


## Enroll Using an Invitation Link

If your practice has sent an email and invited you to enroll in NextGen Enterprise Patient Portal, use the enrollment link in the email. You must have a phone number and date of birth registered with the practice or have a person number.

1. Click **Enroll Now** or the enrollment link you received from your practice in your email address.  
The **Terms and Conditions** page opens.
2. Read the terms and conditions and click **I Accept**.  
The **Personal information** page opens.

A screenshot of the 'Personal information' page in the NextGen Enterprise Patient Portal. The page has a light gray background. At the top, it says 'Welcome [Name]' followed by a blurred email address. Below this, it says 'Please enter the following information to verify your identity.' There are two required fields: '\* Phone number' and '\* Date of birth'. The 'Date of birth' field has a placeholder 'mm/dd/yyyy'. Below these fields is a checkbox labeled 'I have my person number'. At the bottom, there are two blue buttons: 'NEXT' and 'CANCEL'.

3. On the **Personal information** page, do one of the following:
  - If you have registered with a phone number and your date of birth, type your phone number and type your date of birth in mm/dd/yyyy format.
  - If you have only person number available, select **I have my Person Number**, and type your person number.
4. Click **Next**.

 **Note:** If your email address is already associated with an existing account, you will be redirected to the **Account credentials** page. If you see a message that says your email address is already associated with another account, probably you already have a NextGen Enterprise Patient Portal account using the same email address. You can either add the practice to your existing account or you can type a new email address to create a new account. For more information, see the [When Your Email Address is Associated with an Existing Account \(on page 21\)](#) section.

The **Account options** page opens.

5. On the **Account options** page, do one of the following:
  - If you are new to NextGen Enterprise Patient Portal, click [Sign up for a new account. \(on page 13\)](#)
  - If you have already enrolled in NextGen Enterprise Patient Portal and you want to add another practice to your existing account, click [Add to an existing account. \(on page 12\)](#)

## Self-Enroll for NextGen Enterprise Patient Portal Account

If your practice provides you with a portal website enrollment link and advises you to self-enroll, use the self-enrollment link to create a NextGen Enterprise Patient Portal account.

1. Click the enrollment link.  
The **Terms and Conditions** page opens.
2. Read the terms and conditions and click **I Accept**.  
The patient portal welcome page opens.
3. In the patient portal welcome page, do one of the following:
  - If you are new to NextGen Enterprise Patient Portal, click [Sign up for a new account. \(on page 19\)](#)
  - If you have already enrolled in NextGen Enterprise Patient Portal and you want to add another practice to your existing account, click [Add to an existing account. \(on page 21\)](#)

## Sign Up for a New Account

1. On the **Practice options** page, under **Select Medical Practice**, select your practice from the **Practice** list.
2. Click **Next**.  
The **Personal information** page opens.
3. Under **Enter personal information**, type your required information such as name, address, phone number, date of birth, and email address.
4. Click **Next**.  
The **Insurance information** page opens.
5. Under **Enter insurance information (optional)**, do the following as required:
  - Type your health insurance details
  - Type the insurance claim mailing address
6. Select **I'm not a robot** and click **Next**.  
The **Account credentials** page opens.
7. On the **Account credentials** page, under **Set up account**, do the following:
  - a. In **Username**, type your username.
  - b. In **Password**, type your password.
  - c. In **Confirm Password**, re-type your password.

For more information about the latest user name and password policies, see the [Username and Password Policy \(on page 9\)](#) section.

**Set up account**

\* Username

x Use 6-50 characters

\* Password

x Use 8 or more characters  
x Use upper and lower case letters (e.g. Ba)  
x Use a number (e.g. 1234)  
x Use a [special character](#) (e.g. \$^%)  
x Avoid including commonly used passwords (e.g. 'password')

\* Confirm Password

**NEXT** **CANCEL**

8. Click **Next**.

9. The **Security questions** page opens.

10. Under **Set up security questions**, select all five security questions and type the answers. Make a note of the five security questions and associated answers for account recovery in future.

11. Click **Next**.

A submit enrollment request appears that states that your request has been sent to the practice and pending for approval from your practice. Once approved, you will receive a confirmation email for the same.

12. Do any of the following:

- If the appointment module is enabled for the practice:
  - To send your enrollment request to the practice for approval, click **Complete enrollment**. You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
  - To request an appointment before completion of your enrollment, click **Request an appointment**. You will receive a pending approval message stating that your appointment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
- If the appointment module is not enabled for the practice, click **Complete enrollment** to send your enrollment request to the practice for approval. You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.

## Add to an Existing Account

1. Under **Verify your account**, type the username and password for your existing account, and click **Next**.  
The **Practice options** page opens.
2. On the **Practice options** page, under **Select Medical Practice**, select your practice from the **Practice** list.
3. Click **Next**.  
The **Person information** page opens.  
The demographics information will be pre-populated. Add or modify the information, if required.
4. Click **Next**.  
The **Insurance information** page opens.  
The insurance information will be pre-populated. Add or modify the information, if required.
5. Select **I'm not a robot** and click **Next**.  
A submit enrollment request appears that states that your request has been sent to the practice and pending for approval from your practice. Once approved, you will receive a confirmation email for the same.
6. Do any of the following:
  - If the appointment module is enabled for the practice:
    - To send your enrollment request to the practice for approval, click **Complete enrollment**.  
You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
    - To request an appointment before completion of your enrollment, click **Request an appointment**. You will receive a pending approval message stating that your appointment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
  - If the appointment module is not enabled for the practice, click **Complete enrollment** to send your enrollment request to the practice for approval. You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.

## Email Address Associated with an Existing Account

During enrollment, if you see a message on the **Account credentials** page that says your email address is already associated with another account, use the following information to determine the relevant method in NextGen Enterprise Patient Portal.

If	Scenario
You are enrolling in NextGen Enterprise Patient Portal using a token	<p>If your email address is already associated with an existing account and your name and date of birth matches the existing account's information, you can do one of the following:</p> <ul style="list-style-type: none"> <li>• Log on to the existing account and append or add a new practice to the existing account.</li> </ul>

If	Scenario
	<ul style="list-style-type: none"> <li>• Enter a new email address and complete the enrollment process. A new NextGen Enterprise Patient Portal account will be created. After completing enrollment, you will receive an email to verify your email address. Open the email and verify your email address.</li> </ul> <p>If your email address is already associated with an existing account and your name and date of birth does not match the existing account's information, you must type a new email address and complete the enrollment process. A new NextGen Enterprise Patient Portal account will be created. After completing enrollment, you will receive an email to verify your email address. Open the email and verify your email address.</p>
You are enrolling in NextGen Enterprise Patient Portal using an invitation link	<p>If your email address is already associated with an existing account and your name and date of birth matches the existing account's information, you can do one of the following:</p> <ul style="list-style-type: none"> <li>• Log on to the existing account and append or add a new practice to the existing account.</li> <li>• Enter a new email address to enroll. Open the email and verify your email address. After verifying the email address, you will be redirected to the <b>Terms and Conditions</b> page. Complete the enrollment.</li> </ul> <p>If your email address is already associated with an existing account and your name and date of birth does not match the existing account's information, you must type a new email address and verify the email address. After verifying the email address, you will be redirected to the <b>Terms and Conditions</b> page. Complete the enrollment.</p>

## CHAPTER 3

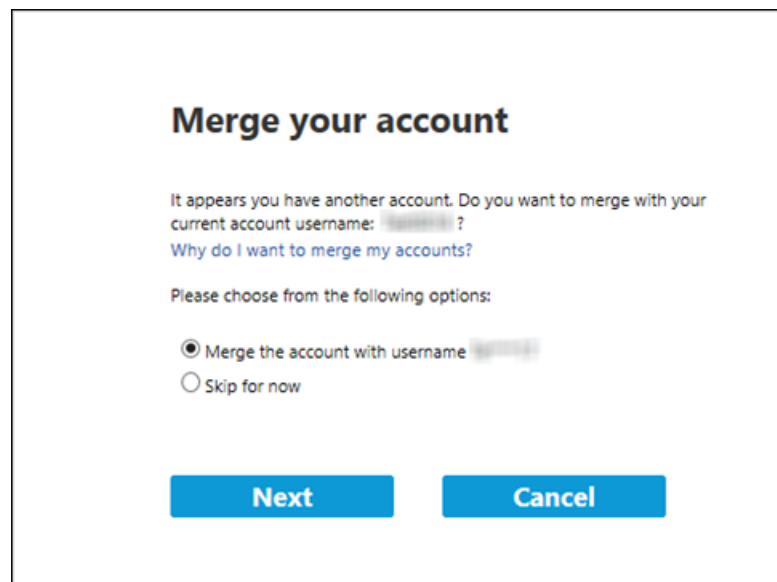
## Merge Your Multiple Accounts


If you have more than one NextGen Enterprise Patient Portal account, you can merge all your accounts to a single account from the following pages:

- [Merge your account \(on page 23\)](#) page
- [Account Settings \(on page 93\)](#) page

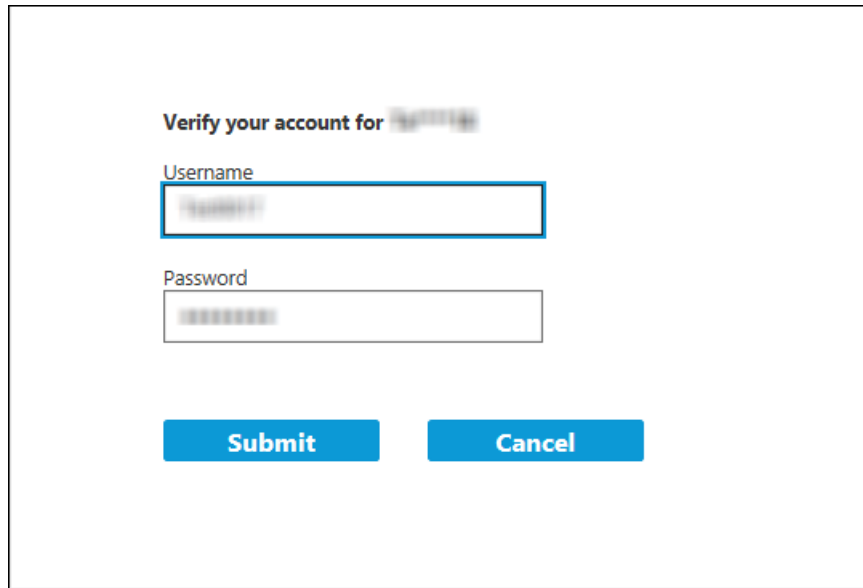
### Merge Accounts

1. Access NextGen Enterprise Patient Portal.
2. Enter your username and password and click **Log In**.  
The **Merge Your Account** window opens.
3. Select the username for the account you would like to merge with your current account and click **Next**.



 **Note:** You can merge only one account at a time. If you do not wish to merge your account, you can click **Skip Now**. Once you click **Skip Now**, you will not be prompted to the **Merge Your Account** page for next three months. After three months, the home page will display a notification to merge your accounts. In this three months, you can merge your account from the **Account Settings** page.

4. On the **Verify Account** window, type your username and password of the account you would like to merge with your current account, and click **Submit**.




Verify your account for [masked]


Username  
[masked]

Password  
[masked]

Submit Cancel


 **Note:** Three unsuccessful attempts will redirect you to your NextGen Enterprise Patient Portal home page. The home page displays a message stating that the accounts cannot be merged and you can do the same in future from the **Account Settings** page.

5. Click **Yes** to confirm for merging accounts.

 **Note:** Clicking **No** will redirect you to NextGen Enterprise Patient Portal home page and you can merge your accounts from the **Account Settings** page. In future, you will be prompted the **Merge your account** page again during log on process.

The NextGen Enterprise Patient Portal home page opens.

The home page displays a message stating that your accounts have been merged and you can access all your account information with a single logon. You will also receive an email notification to your verified account email address when you merge your accounts.

 **Note:** The additional practice name will be listed under the **Preferred Notification Method** section in the **Account Settings** page and the **Practices** list in your NextGen Enterprise Patient Portal home page. Now you can access all your medications, messages, medications from your home page.

## *Merge More than Two Accounts*

During each logon, you can merge only one account with the currently logged on account. If you have more than two accounts, you can merge the remaining account the next time you log on or merge it from the **Account settings** page immediately after the first merge.

## CHAPTER 4

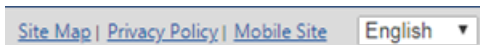
# NextGen Enterprise Patient Portal Web Account Access

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

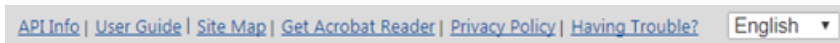
## Change NextGen Enterprise Patient Portal Language

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

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



- To change the language after you log on, from the list on the bottom-right corner of NextGen Enterprise Patient Portal, select the language.



## NextGen Patient Access API

You can access your health data through other applications and websites using NextGen™ Patient Access API. To learn more about NextGen Patient Access API, click the link provided in the following message.



If you do not want to see the message, you can close the message. To view it again, click the **API Info** link at the bottom of every page.

## Log On to NextGen Enterprise Patient Portal Account

1. Access the NextGen Enterprise Patient Portal website.

**Log into Patient Portal**

Username

[Forgot username?](#)

Password

[Forgot password?](#)

**LOG IN**

[I have my password reset token](#)

2. Enter your **Username** and **Password** and click **Log In**.

For more information about username and password policy, see [Username and Password Policy \(on page 9\)](#)

**Go Paperless!**

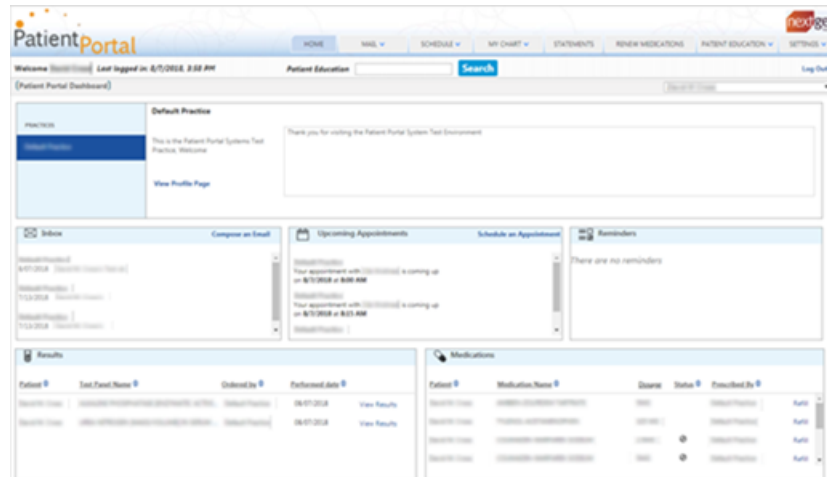
You can choose to receive your statements online. By checking the option(s) below you can elect to receive an electronic version of your statement from your practice. Leave the option(s) below unchecked if you wish to receive both electronic and paper statements.

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

The practice 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 \(on page 105\)](#) section.

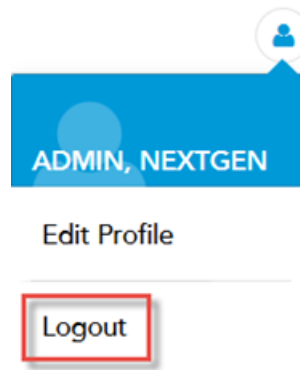
Based on the practice configuration, the portal also displays a disclaimer related to PHRs and Medications. For more information about the disclaimer, see the [Disclaimer Related to PHR and Medications \(on page 29\)](#) section.

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



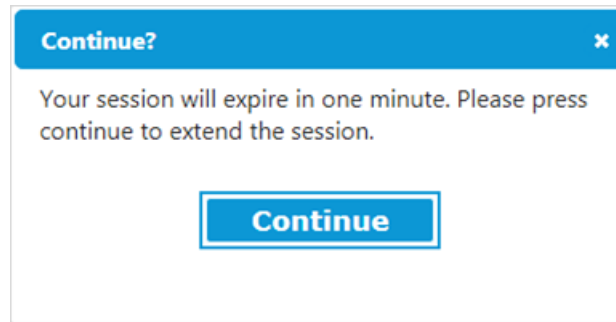
## Log Off from NextGen Enterprise Patient Portal Account

- To log off from your NextGen Enterprise Patient Portal account, click the **Log Out** link at the top of the page.



## NextGen Enterprise Patient Portal Session Time Out

If NextGen Enterprise 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.

**i Tip:** NextGen Healthcare recommends you to log off before exiting the NextGen Enterprise Patient Portal website to ensure security of your health information.

## Locked Accounts

You cannot access your NextGen Enterprise 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 log on, NextGen Enterprise Patient Portal displays an alert message stating that your account has been locked because of incorrect logon attempts.  
Your account will be automatically unlocked only after 20 minutes. You can logon using the correct credentials after this session.
- If the practice locks your account, you will receive an email stating that your account is locked and 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). After the practice unlocks your account, you will receive another email stating that the account has been unlocked.

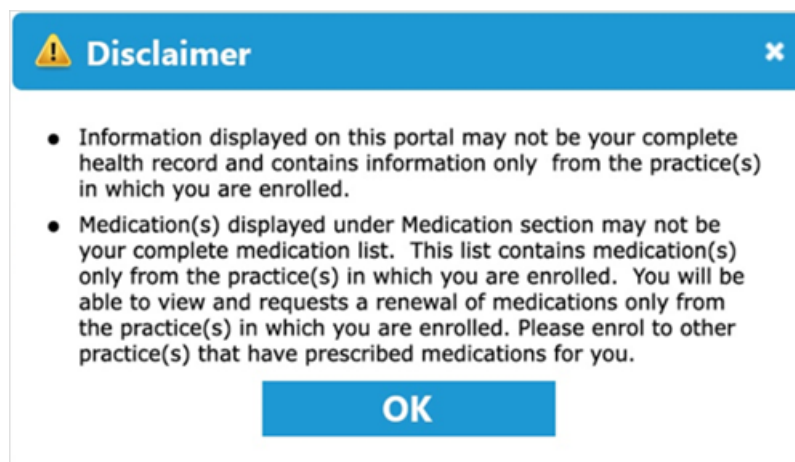
## Change the User


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 the 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.

## Disclaimer Related to PHR and Medications

Your NextGen Enterprise Patient Portal displays your health-related information only from the practices you are enrolled in. If configured by practice, NextGen Enterprise Patient Portal displays a disclaimer regarding your PHRs and medications when you log on to your portal account. You can do one of the following:

1. Read and then acknowledge the disclaimer by clicking **OK**.
2. Click **x** to dismiss the disclaimer and read it later. If you click **x** and close the disclaimer, the disclaimer will be displayed every time you log on to your portal account until you acknowledge it by clicking **OK**.




You can also view the disclaimer any time from the dashboard. The  icon in the following sections allow you to view the disclaimer:

- on the top-left corner of the home page for PHR related message
- in the **Medications** section for medications related message.
- in the **Renew Medications** section for medications related message.

## Recover Logon Details

You can perform any of the following:

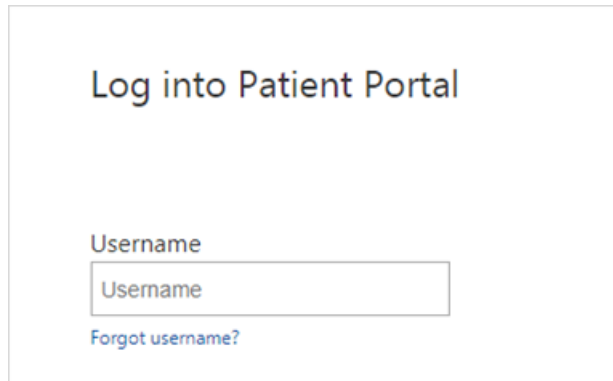
- Recover username
- Reset password
- Reset password with a reset token

 **Note:** You can recover your username or reset your password easily, if you have provided your email address during enrollment and verified your account email address. When you submit a recover username or reset password request, a notification containing the username or password reset link is sent to your account email address (verified account email address). If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username and security questions. If you are not able to recover your username or reset your password, contact your practice.

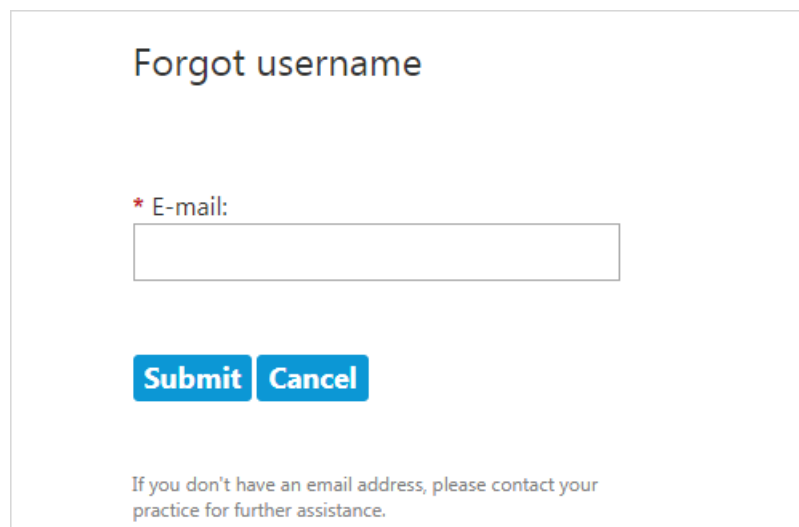
## Recover Username

If you have a verified account email address or notification email address, you can recover your username using the **Forgot username** link. If you do not have either an account email address or notification email address, you must contact your practice to recover your username.


1. Access the NextGen Enterprise Patient Portal website logon page.
2. Click **Forgot username**.



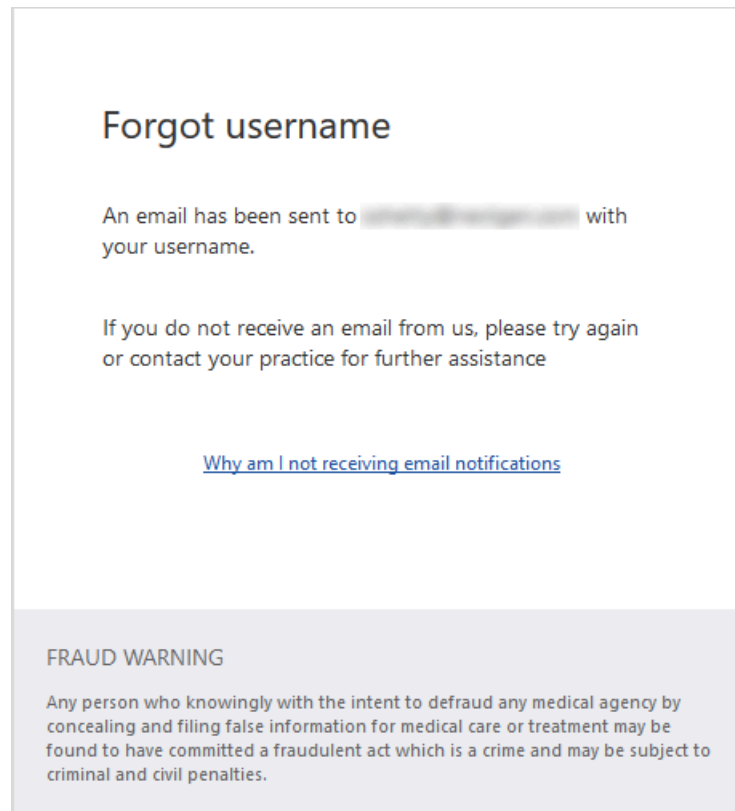
3. Type your verified account email address.



4. Click **Submit**.

 **Note:** If you do not have a verified account email address, type your notification email address and click **Submit**. Then, you must type your **Last Name**, **Date of birth (mm/dd/yyyy)**, and click **Submit**.

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



**Forgot username**

An email has been sent to [redacted] with your username.

If you do not receive an email from us, please try again or contact your practice for further assistance

[Why am I not receiving email notifications](#)

**FRAUD WARNING**

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

5. Open the email to view your username.

## Reset Password

If you have a registered email address, you can reset your password using the **Forgot Password** link. If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username and security questions.


1. Access the NextGen Enterprise Patient Portal website logon page.
2. Click **Forgot password**.

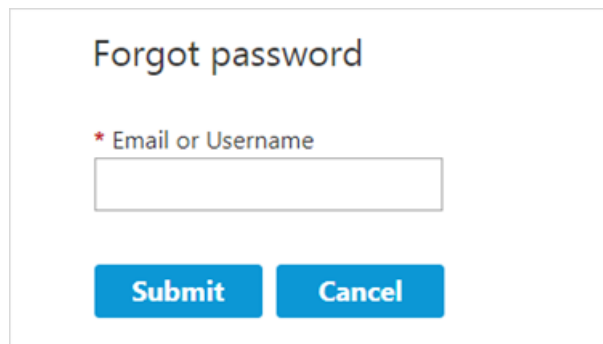


**Password**

[Forgot password?](#)

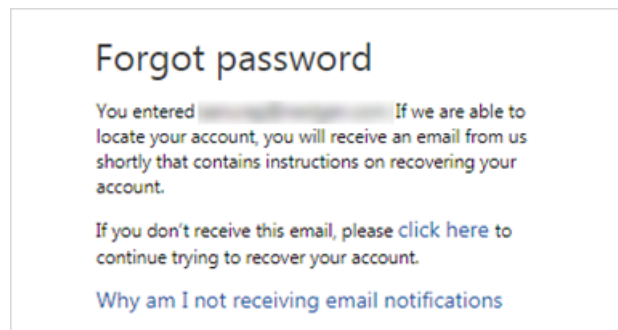
3. Type your registered verified account email address.

 **Note:** If you have not provided your email address during enrollment and have not verified your NextGen Enterprise Patient Portal account, you must remember your valid username and security questions. The system will ask you to answer *two* security questions that you have already set up. You will get *three* attempts to give the security answer for each of the *two* questions. Answering the correct answers will redirect you to the **Reset Password** page. Unsuccessful attempts will lock your account for 20 minutes. For more information about locked accounts, see the [Locked Accounts \(on page 28\)](#) section.


A screenshot of a web form titled "Forgot password". It features a red asterisk followed by the text "Email or Username" above a single-line text input field. Below the input field are two blue buttons: "Submit" and "Cancel".

4. Click **Submit**.

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

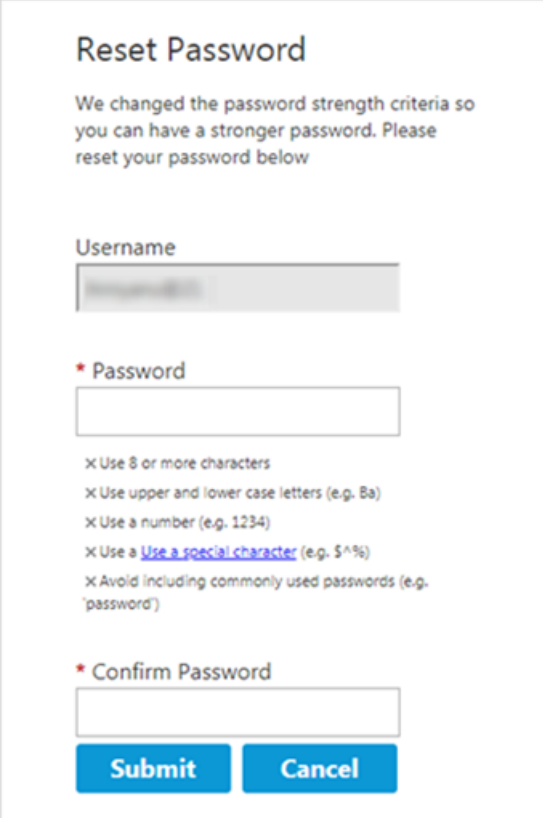
A screenshot of a confirmation message titled "Forgot password". The text reads: "You entered [redacted] If we are able to locate your account, you will receive an email from us shortly that contains instructions on recovering your account." Below this, it says: "If you don't receive this email, please [click here](#) to continue trying to recover your account." At the bottom is a link: "[Why am I not receiving email notifications](#)".

5. Open the email you received and click **Password Reset**.

 **Note:** The password link in the email expire is subject to your practice settings. Your password validity is provided in the password reset email. Password recovery email is unique to your verified account email.

6. Under the **Reset Password** page, enter the following information:

- a. Type your password
- b. Re-type your password



**Reset Password**

We changed the password strength criteria so you can have a stronger password. Please reset your password below

Username

\* Password

x Use 8 or more characters  
x Use upper and lower case letters (e.g. Ba)  
x Use a number (e.g. 1234)  
x Use a [special character](#) (e.g. \$^%)  
x Avoid including commonly used passwords (e.g. 'password')

\* Confirm Password

**Submit** **Cancel**

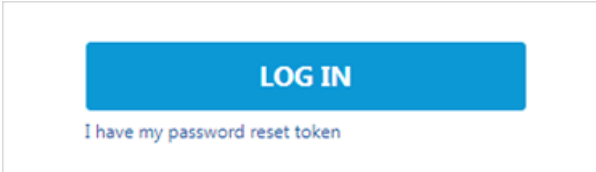
7. Click **Submit**.

The NextGen Enterprise Patient Portal home page opens.

## ***Reset Password with a Reset Token***

If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username. To get a password reset token, contact your practice.

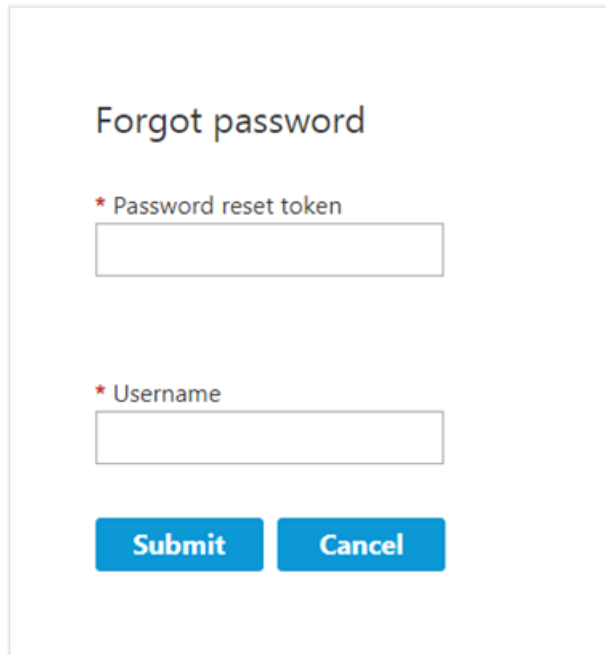
1. Go to the NextGen Enterprise Patient Portal website logon page.
2. Click **I have my password reset token**.



**LOG IN**

[I have my password reset token](#)

3. On the **Forgot password** page, do the following:
  - a. Type the token number provided by your practice.
  - b. Type your username.

A screenshot of a web form titled "Forgot password". The form is enclosed in a light gray border. It contains two text input fields. The first field is labeled with a red asterisk and the text "Password reset token". The second field is labeled with a red asterisk and the text "Username". Below the input fields are two blue buttons: "Submit" and "Cancel".


Forgot password

\* Password reset token

\* Username

Submit Cancel

4. Click **Submit**.

 **Note:** If you have not registered your email address, type your email address, and click **Submit**. If you do not wish to provide email address, select **I do not wish to provide an email address**.

5. On the **Reset Password** page, do the following:
  - a. Type your password.
  - b. Re-type your password.

## Reset Password

We changed the password strength criteria so you can have a stronger password. Please reset your password below

Username

\* Password

x Use 8 or more characters  
x Use upper and lower case letters (e.g. Ba)  
x Use a number (e.g. 1234)  
x Use a [Use a special character](#) (e.g. \$^%)  
x Avoid including commonly used passwords (e.g. 'password')

\* Confirm Password

**Submit** **Cancel**

6. Click **Submit**.

The NextGen Enterprise Patient Portal home page opens.

## CHAPTER 5


# 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 Enterprise Patient Portal home page, click the **Mail** tab, and then select **Inbox** .

The inbox opens.

From the **Inbox**, you can any of the following:

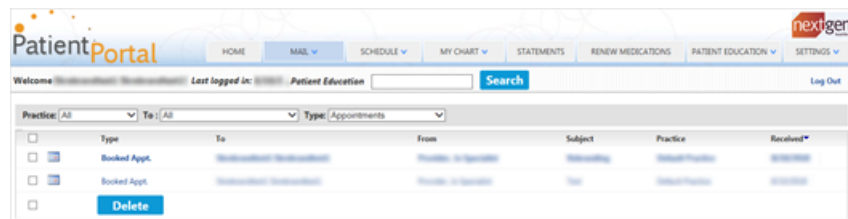
- *View your appointments from inbox:* For more information about view your appointments from inbox, see the [View Your Appointments from Inbox \(on page 37\)](#) section.
- *View attached documents:* For more information about view attached documents, see the [View Attached Documents \(on page 38\)](#) section.
- *Access statement from inbox:* For more information about access statement from inbox, see the [Access Statements from Inbox \(on page 39\)](#) section.
- *View medications:* For more information about view medications, see the [View Medications \(on page 40\)](#) section.
- *View messages:* For more information about view messages, see the [View Messages \(on page 41\)](#) section.
- *Reply to messages:* For more information about replying to messages, see the [Reply to Messages \(on page 41\)](#) section.
- *Submit a form:* For more information about submit a form, see the [Submit a Form \(on page 42\)](#) section.

- *Submit an interactive medical form:* For more information about submit an interactive medical form, see the [Submit an Interactive Medical Form \(on page 43\)](#) section.
- *View Personal Health Records:* For more information about view Personal Health Records, see the [View Personal Health Record \(PHR\) \(on page 44\)](#) section.
- *Delete inbox items:* For more information about delete inbox items, see the [Delete Inbox Items \(on page 44\)](#) section.
- *Print inbox items:* For more information about print inbox items, see the [Print Inbox Items \(on page 45\)](#) 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 Enterprise Patient Portal home page, click **Mail > Inbox**.



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



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

## View Attached Documents

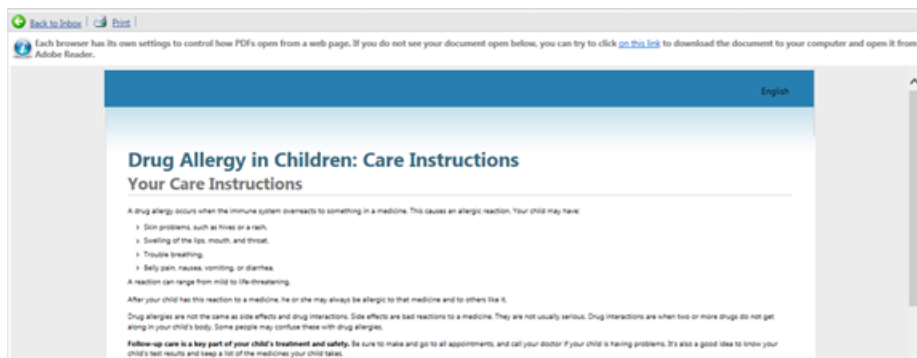
You can view documents shared by your practice. To view attached documents you require Adobe® Acrobat® Reader. If you do not have it installed, you can download and install it from the [Adobe reader website](#).

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**



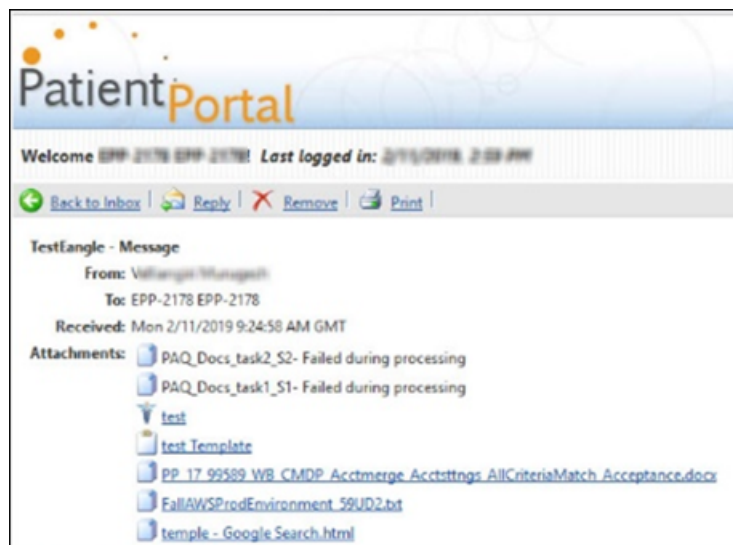
Type	To	From	Subject	Practice	Received
Documents	John H. Doe	Dr. Michael J. Smith	Sample doc	Dr. Michael J. Smith	1/15/2017
Documents	John H. Doe	Dr. Michael J. Smith	Return Patient Appointment Request	Dr. Michael J. Smith	1/15/2017
Documents	John H. Doe	Dr. Michael J. Smith	Learning About Possible Allergy	Dr. Michael J. Smith	1/15/2017
Documents	John H. Doe	Dr. Michael J. Smith	Drug Allergy in Children: Care Instructions	Dr. Michael J. Smith	1/15/2017
Documents	John H. Doe	Dr. Michael J. Smith	Lab Results	Dr. Michael J. Smith	1/15/2017

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.

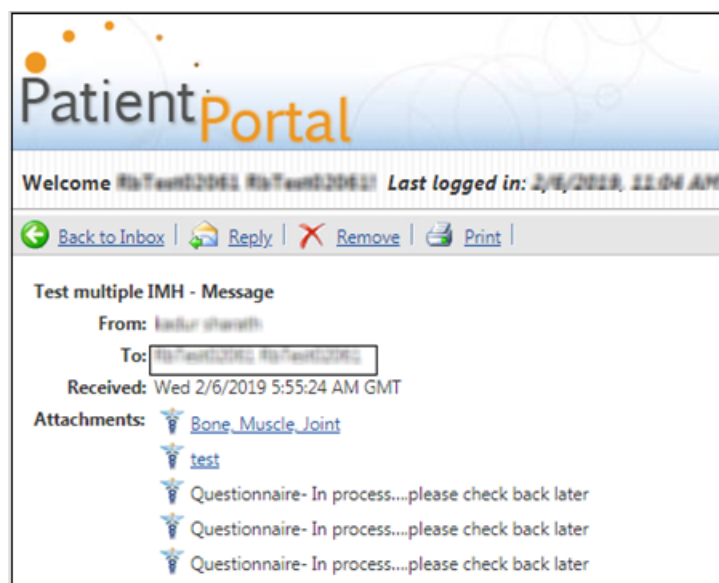


The comments entered by your practice appear on **Document Comments**. You can view your practice comment in the Document Comments window, if you are viewing the document for the first time.

3. For a message with multiple attachments, the status of the attachments is displayed in the message.
  - If an attachment has not processed successfully, its status is indicated as failed.



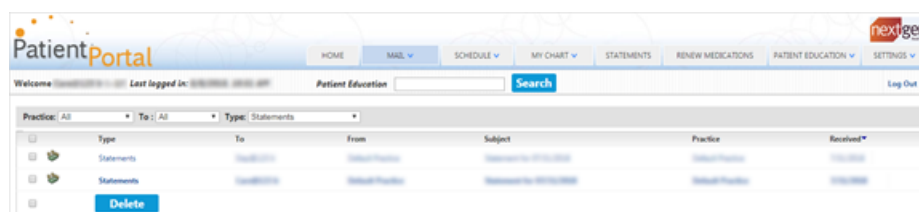
- If an attachment is being processed, its status is indicated as in process.



## Access Statements from Inbox

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

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**



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

The screenshot shows the 'Statements' page in the NextGen Enterprise Patient Portal. At the top, there is a navigation bar with links like HOME, MAIL, SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION, and SETTINGS. Below the navigation bar, there is a search bar and a 'Log Out' link. The main content area is titled 'Statements' and includes a disclaimer about refunds. Below the disclaimer, there is a section for 'View Statement' with fields for Practice Name, Patient Name, and Statement Date. A 'View Statement' button is next to these fields. Below this, there is a section for 'Pay Now' with a 'Pay Now' button. At the bottom, there is a 'Print Statement' button and a table of account balances.

DATE	PAYMENT	DESCRIPTION OF SERVICE	AMOUNT	PAID BALANCE	PAYMENT BALANCE														
This is an electronic copy of your statement. A paper copy has also been mailed to you. If you pay this statement online, please disregard the paper copy.																			
STATEMENT DATE: 7/1/2018																			
SEND TO: Default Practice, HOSPITAL, PA 19044																			
<table border="1"> <thead> <tr> <th>ACCOUNT NUMBER</th> <th>CURRENT</th> <th>30 DAYS</th> <th>60 DAYS</th> <th>90 DAYS</th> <th>120 DAYS</th> <th>TOTAL ACCOUNT BALANCE</th> </tr> </thead> <tbody> <tr> <td>1234567890</td> <td>100.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>100.00</td> </tr> </tbody> </table>						ACCOUNT NUMBER	CURRENT	30 DAYS	60 DAYS	90 DAYS	120 DAYS	TOTAL ACCOUNT BALANCE	1234567890	100.00	0.00	0.00	0.00	0.00	100.00
ACCOUNT NUMBER	CURRENT	30 DAYS	60 DAYS	90 DAYS	120 DAYS	TOTAL ACCOUNT BALANCE													
1234567890	100.00	0.00	0.00	0.00	0.00	100.00													

**Note:** The **Pay Now** button is disabled for Care Managers with **View Only** access for their dependent's NextGen Enterprise Patient Portal account and the Care Managers are not allowed to pay bills on behalf of their dependents. If the **Pay Now** button is not active, it may indicate that you have opted to use an APC plan. For more information about automatic payment plan, see the [Automatic Payment Collection Plan \(on page 72\)](#) section.

- 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 \(on page 70\)](#) section.

## View Medications

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

- On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**

The screenshot shows the 'Mail > Inbox' page in the NextGen Enterprise Patient Portal. At the top, there is a navigation bar with links like HOME, MAIL, SCHEDULE, MY CHART, STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION, and SETTINGS. Below the navigation bar, there is a search bar and a 'Log Out' link. The main content area is titled 'Mail > Inbox' and includes a section for 'Medications'. Below this, there is a table of medication communications with columns for Type, To, From, Subject, Practice, and Received. A 'DELETE' button is visible at the bottom of the table.

Type	To	From	Subject	Practice	Received*
<input type="checkbox"/>	Medication	12/1/2017	Dr. Smith	Medication communication with patient	12/1/2017
<input type="checkbox"/>	Medication	12/1/2017	Dr. Smith	Medication communication with patient	12/1/2017

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

Back to Inbox Remove Print

**This Medication Renewal is Complete**

Patient Name: [Redacted]  
 Pharmacy: [Redacted]

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

Medication(s) Requested

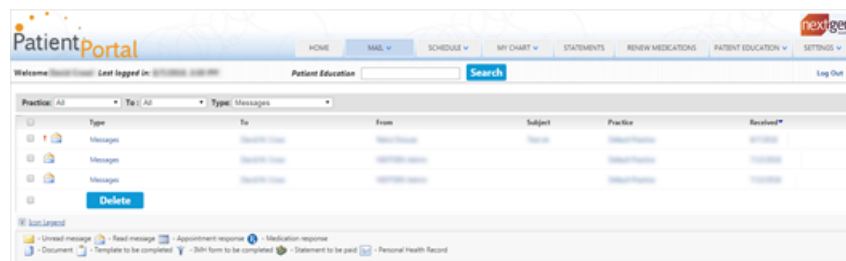
Status	Prescription	Dose	Route	Description
Accepted	[Redacted]	[Redacted]	[Redacted]	[Redacted]

For more information about medication see the [Renew Medication \(on page 81\)](#) section.

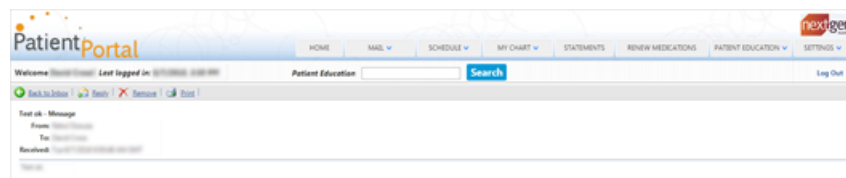
## View Messages

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

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**



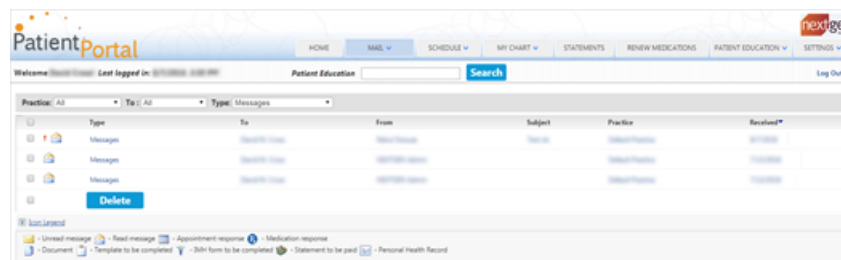
2. From the **Type** list, select **Messages**, and then click a message communication.



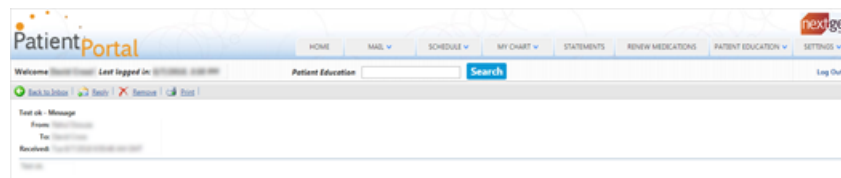
## Reply to Messages

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

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**



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

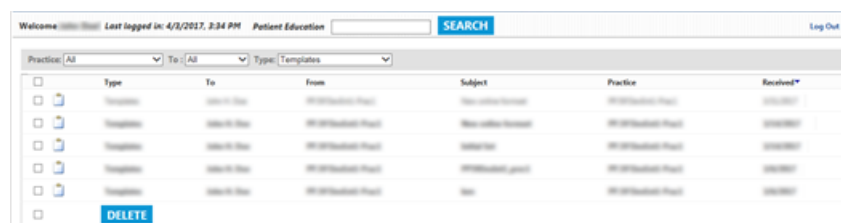


- From the message details, you can:
  - Click **Reply** to reply to a message.
  - Click **Remove** to remove a message
  - Click **Print** to print a message.

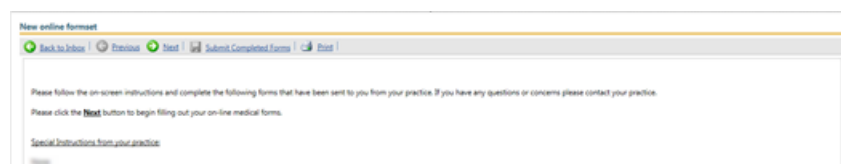
## Submit a Form

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

- On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**.



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



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

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

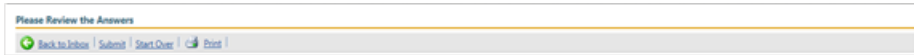
## Submit an Interactive Medical Form

Interactive Medical History forms are questionnaires designed to record medical history and diagnostic information prior to your visit. If your practice sends you interactive medical forms, you can complete and submit them online.

- On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**.

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

- 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.

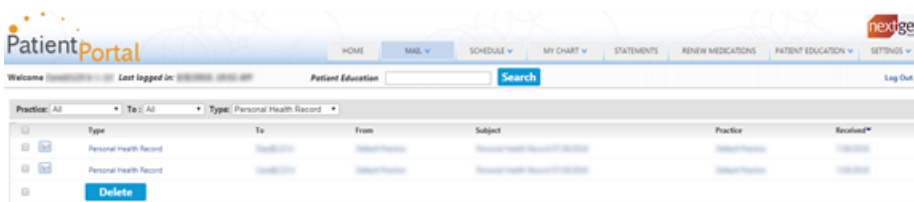


4. Review your information and perform any one of the following:
  - Click **Start Over** to go back and start from the first question.
  - Click **Submit** to send the completed form to the practice.

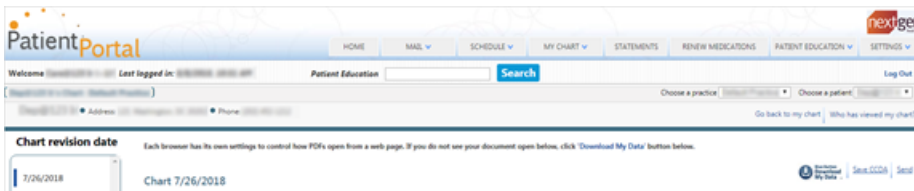
## View Personal Health Record

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

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**



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



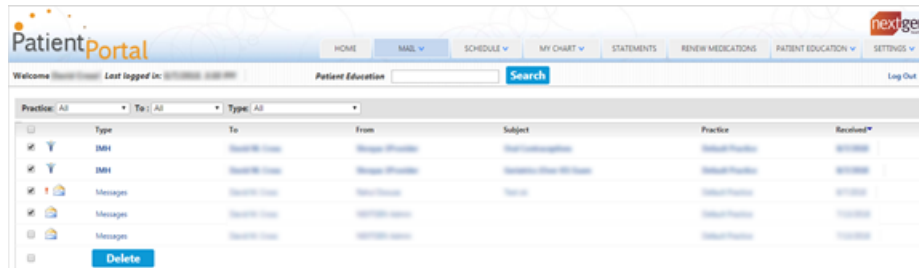
Most recent PHR update appears on the top of the message list.

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

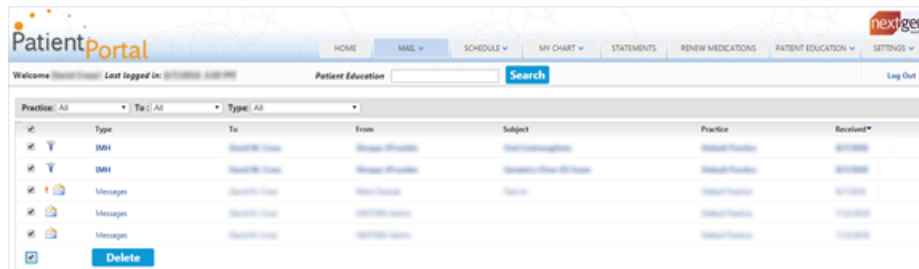
## Delete Inbox Items

You can delete inbox items from your inbox.

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



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

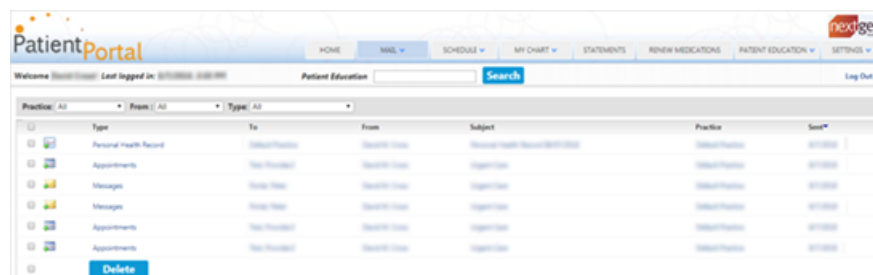


3. Click **Delete** and click **OK**.

## View Sent Items

You can view all your sent messages.

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Sent Items**



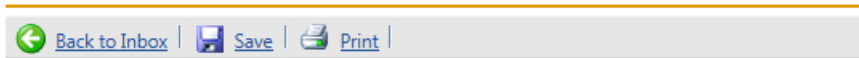
2. From the sent item, you can:

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

## 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 Enterprise Patient Portal home page, click **Mail > Inbox**
2. Open a message.



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

## Download Inbox Items

You can download the following inbox items from NextGen Enterprise Patient Portal to your system.

- Documents
- Statements
- Medications
- Messages
- Personal Health Records

While downloading, the inbox items and their attachments are converted to PDF files, and packaged as a zip file.

1. [Log on to NextGen Enterprise Patient Portal \(on page 25\)](#).
2. On the NextGen Enterprise Patient Portal home page, click **Mail > Export Messages**.  
The **Export Messages** page opens.

3. To set the filter criteria for the download, do the following:
  - a. Select the practice.  
The **Practice** list displays the names of all the practices that have sent messages to the patient. **All** is selected by default.
  - b. From **Sent To**, select the patient's name.  
The **Sent To** list displays the names of the patient and dependents. **All** is selected by default.
  - c. From **Type**, select the inbox item type which you want to download.  
**All** is selected by default.
  - d. To set a date range, use the **From** and **To** calendars

4. Click **Download Messages**.


A message appears indicating that it may take some time to complete the download, and that patient portal activities might be interrupted while the download is in progress.

5. Do one of the following:

- Click **Cancel** to stop the download.
- Click **OK** to download the inbox items.

A zip file with the name ExportedMessages\_<date of download><time of download> is downloaded to your system.

The zip file is password protected. The password hint appears on the filters page.

 **CAUTION:** You can download up to 100 inbox items at a time. If the number of inbox items for the set filter criteria is more than 100, a message appears on a separate tab indicating that there are more than 100 items for the set filter criteria and prompting you to modify the filter criteria to download the items.

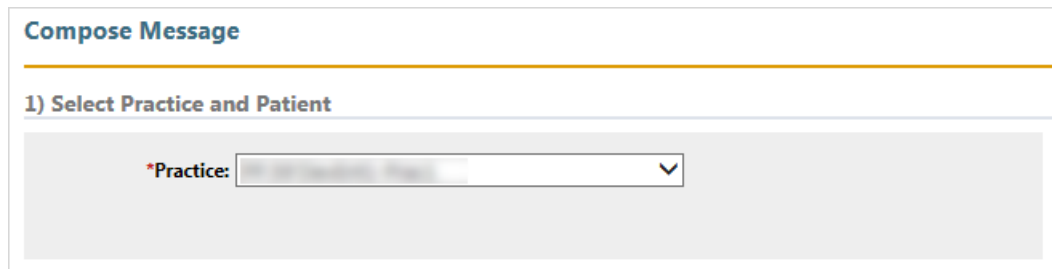
 **Note:** When a download is in progress, the **Download Messages** button on the **Export Messages** page is disabled.


## Send Messages

You can send messages to your practice.

1. On the NextGen Enterprise Patient Portal home page, click **Mail > 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:  ▼

\*To:  ▼

\*Subject:

\*Message:

 \*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.

## CHAPTER 6

# 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 Enterprise 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

On the NextGen Enterprise Patient Portal home page, click **Schedule**, and then click **Request Appointment**.

1. Under **Select Your Medical Practice**, select a practice.

The screenshot shows the 'Appointment Request' form with three tabs: '1. ENTER REQUEST' (active), '2. SELECT APPOINTMENT', and '3. VIEW DETAILS'. Below the tabs, the heading '1) Select Your Medical Practice' is followed by the instruction 'Please select the medical practice for that appointment.' A dropdown menu labeled '\*Practice:' is shown with a downward arrow.

2. 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.

The screenshot shows the '2) Select Provider and Location' section with the instruction 'Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (\*) denotes required field.' There are three dropdown menus: '\*Select provider/group:', '\*Select category:', and '\*Select location:'. A link labeled 'Address' is visible next to the location dropdown.

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

2) Select Provider and Location

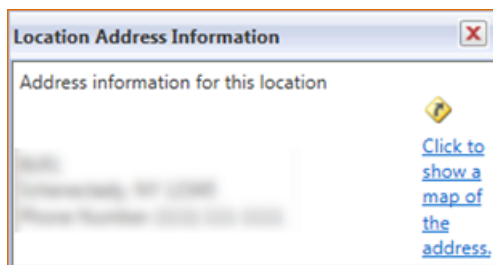
Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (\*) denotes required field.

\*Select provider/group: [dropdown]  
 \*Select category: [dropdown]  
 \*Select location: [dropdown] [Address](#)

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

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

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



3. 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 [Request Appointments \(on page 49\)](#).
2. Under **Submit Request**, enter or select the following information:
  - Enter the reason for the appointment in **Reason for appointment**.
  - From **Priority**, select the level of urgency (Low, Normal, or High).
  - From **Make appointment for**, select the time frame for your appointment.
  - In **Start date** and **End date**, select the start date and end date when you would like to schedule the appointment.
  - From **Preferred date/time**, select a time within the hours of operation, and then select a corresponding check box for the day when you would like to schedule the appointment.
  - From **Alternate date/time**, if available, select an alternate date and time when you would like to schedule the appointment. You can also select a corresponding check box for the day when you would like to schedule the appointment.

**3 ) Submit Request**  
Please fill in all required fields and click the Submit button to submit your request.

\*Reason for appointment:

\*Priority:


\*Make appointment for:

\*Preferred date/time:  to

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

Alternate date/time:  to

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

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

**SUBMIT**

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 [Accept a Pending Appointment Request \(on page 54\)](#).

5. If the suggested time is not suitable, you must either [cancel \(on page 55\)](#) or [reschedule \(on page 56\)](#) 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 \(on page 49\)](#).

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

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

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

\*Reason for appointment:


\*Priority: Normal

\*Make appointment for: This Week

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

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

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

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


**SEARCH**

3. Click **Search** and select an appointment from the list.

**Appointment Request**

1. ENTER REQUEST 2. SELECT APPOINTMENT

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

 This is an Real Time Appointment...

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

[Load more >>](#)

**BOOK APPOINTMENT**

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



**Appointment Request**

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

Your appointment is booked  
You can find all of your appointments by clicking on the My Appointments link.  
[Make another appointment](#)   [Print for your records](#)

Patient: [Name]  
 Date: [Date]  
 Provider: [Name]  
 Location: [Location]  
 Phone number: [Number]  
 Type: [Type]  
 Instructions: [Instructions]

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

## Accept a Pending Appointment Request

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

1. Open the pending appointment from the Inbox.

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

**This appointment request is awaiting your response**

**Date practice responded:** [Date]  
**Proposed appointment date:** [Date]  
**Proposed provider:** [Name]  
**Proposed location:** [Location]

**Message from practice:**  
[Message]

**Original Appointment Request**

**Patient Name:** [Name]  
**Date sent to practice:** [Date]  
**Requested provider:** [Name]  
**Requested category:** [Category]  
**Requested location:** [Location]  
**Appointment priority:** [Priority]  
**1st preferred:** [Date]  
**2nd preferred:** [Date]  
**Reason for appointment:** [Reason]

2. Click **Accept**.

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

## Reply to a Pending Appointment Request

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

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

Welcome | Last logged in: 4/10/2017, 10:32 AM | Patient Education |  **SEARCH**

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

**This appointment request is awaiting your response**

Date practice responded: [blurred]  
 Proposed appointment date: [blurred]  
 Proposed provider: [blurred]  
 Proposed location: [blurred]

Message from practice: [blurred]

Original Appointment Request

Patient Name: [blurred]  
 Date sent to practice: [blurred]  
 Requested provider: [blurred]  
 Requested category: [blurred]  
 Requested location: [blurred]  
 Appointment priority: [blurred]  
 1st preferred: [blurred]  
 2nd preferred: [blurred]  
 Reason for appointment: [blurred]

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

[Back to Inbox](#) | [Send](#)

\* Reason for new appointment:

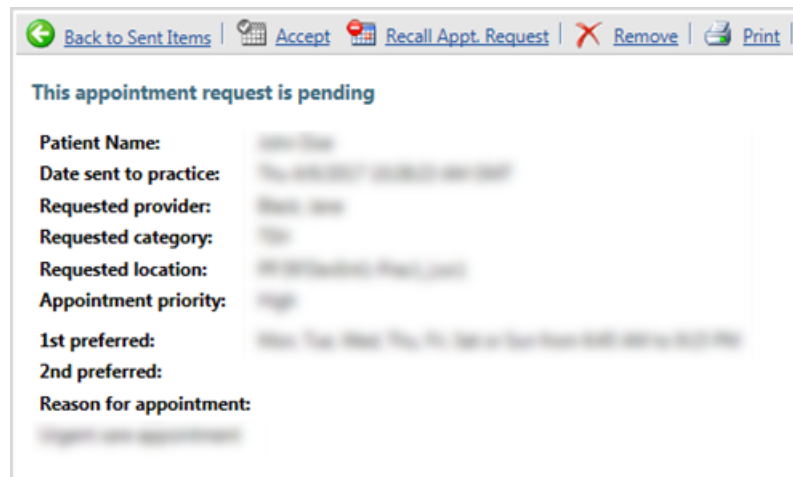
⚠️ Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911) or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.

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.

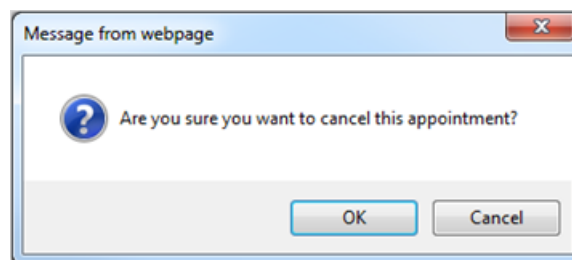
1. From **Mail**, click **Sent Items**, and then open a pending appointment.
2. Click **Recall Appt. Request**.



A screenshot of a web application window showing a pending appointment request. The window has a title bar with several buttons: 'Back to Sent Items', 'Accept', 'Recall Appt. Request', 'Remove', and 'Print'. Below the title bar, the text 'This appointment request is pending' is displayed. The form contains the following fields:

- Patient Name:
- Date sent to practice:
- Requested provider:
- Requested category:
- Requested location:
- Appointment priority:
- 1st preferred:
- 2nd preferred:
- Reason for appointment:

3. Click **OK**.



The pending appointment request is canceled.

## ***Reschedule a Booked Appointment***

You can reschedule a booked appointment before the appointment date.

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

Back | Remove | Print | Export to Calendar

**This appointment is booked**

Patient: [blurred]  
 Date: [blurred]  
 Provider: [blurred]  
 Location: [blurred]  
 Phone number: [blurred]  
 Type: [blurred]  
 Instructions: [blurred]

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

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

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

Reason:  **SUBMIT**

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

- Select a **Reason** and then click **Submit**.  
 The selected appointment's status is set to canceled.
- You can now start a new appointment request.

## Cancel a Booked Appointment

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

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

Back | Remove | Print | Export to Calendar

**This appointment is booked**

Patient: [blurred]  
 Date: [blurred]  
 Provider: [blurred]  
 Location: [blurred]  
 Phone number: [blurred]  
 Type: [blurred]  
 Instructions: [blurred]

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

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

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

Reason:  **SUBMIT**

[Reschedule 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. The selected appointment's status is set to **Canceled**.

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

## Delete a Pending Appointment Request

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

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

[Back to Inbox](#) | [Accept](#) | [Reply](#) | [Remove](#) | [Print](#)

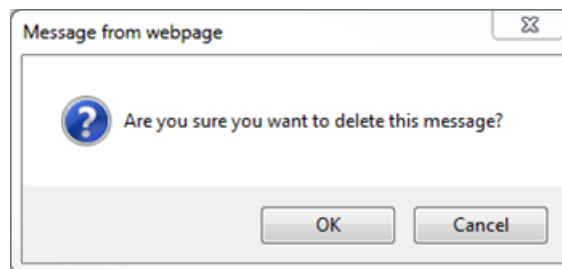
**This appointment request is awaiting your response**

Date practice responded: [blurred]  
 Proposed appointment date: [blurred]  
 Proposed provider: [blurred]  
 Proposed location: [blurred]  
 Message from practice: [blurred]

Original Appointment Request

Patient Name: [blurred]  
 Date sent to practice: [blurred]  
 Requested provider: [blurred]  
 Requested category: [blurred]  
 Requested location: [blurred]  
 Appointment priority: [blurred]  
 1st preferred: [blurred]  
 2nd preferred: [blurred]  
 Reason for appointment: [blurred]

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

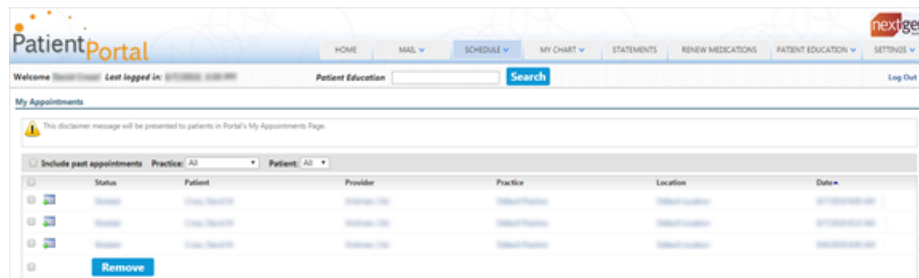
The My Appointments page displays a list of all the booked and canceled appointments. You access the My Appointments page from the **Mail** tab or by clicking **Upcoming Appointments** on the Home page. You can open and print, [cancel \(on page 57\)](#), [reschedule \(on page 56\)](#), or [delete appointments \(on page 58\)](#).

## Export an Appointment

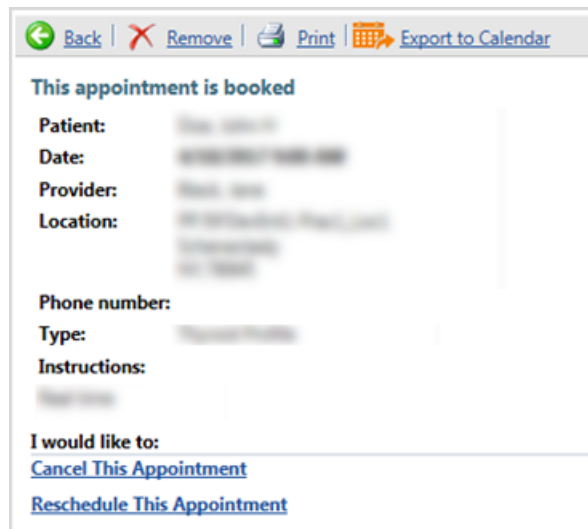
You can export booked appointments as .ics files and import them into any calendar or scheduling application that supports the .ics format. For example, Apple® Calendar or Microsoft® Outlook®. This helps you view your appointment details on any device that has a calendar application, without opening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

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

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



3. Click **Export to Calendar**.



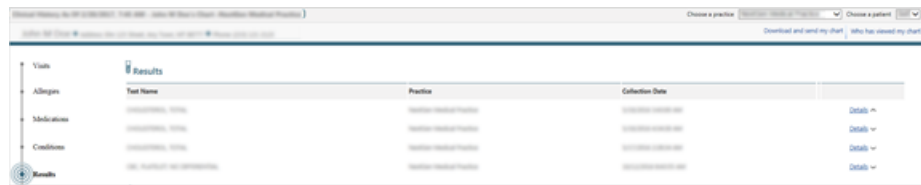
The appointment is saved as a .ics file. When prompted, you can open it directly or save it to your device.

## CHAPTER 7

## View 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 Enterprise Patient Portal home page, click **My Chart > View My Chart**.



2. Click a chart item on the left to view the [chart details](#). (on page 61)
3. Do any of the following:
  - 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](#) (on page 63).
  - 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 [See Who Viewed Your Chart](#) (on page 69).

## Sections in Personal Health Record

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

Chart Item	Displays
Health Overview	Height, weight and the current Body Mass Index(BMI).
Basic Information About You	Information like date of birth, address, phone number, sex, marital status, race and ethnicity.
Care Team Members	Name and address of providers.
Visits	The provider name, encounter type, medications from the latest visits.
Allergies, Adverse Reactions, Alerts	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.
Problems	Names of conditions, effective dates, last related visit, and status of the health condition.
Procedures	The date and name of the procedure performed at the practice.

Chart Item	Displays
Results	Test names, collection date, and lab results.
Advanced Directives	The advance healthcare directives, results, and effective date recorded at the practice.
Encounters	Encounter description, name and location of practice, reason for visit, date of visit, name of provider, and providers copied on encounter.
Family History	The names of the family members along with diagnosis, age at onset, and status of family's medical history.
Immunizations	Immunization names, date, comments, and status of the immunization ordered at the practice.
Payers	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.
Vital Signs	The date vital signs were taken, vital signs, and measure results of all vitals recorded at the practice.
Chief Complaint And Reason for Visit	Chief complaint and the history of present illness
Reason For Referral	NA
Plan Of Treatment	The date, type, action, and status of the plan of care recorded at the practice.
History Of Present Illness	The encounter date, complaint and the history of present illness recorded at practice.
Functional Status	The functional status recorded at the practice.
Medications Administered	Medication name, instructions, dosage, effective date and status.
Instructions	The instructions entered by the providers at the practice.
Assessments	Type of assessment, description and date.
Goals	The date, type, action and status recorded for goals.
Medical Equipment	Description of medical equipment, name of the device, universal device identifier, and start date for any medical equipment used by practice.
Mental Status	Date and cognitive assessment.
Health Concerns	Observations, Concerns, status and date of observation.
General Status	Findings and details.
Review of Systems	Name of the body system, status (Positive or Negative) and findings.
Past Medical History	Condition, effective date and outcome.

## 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

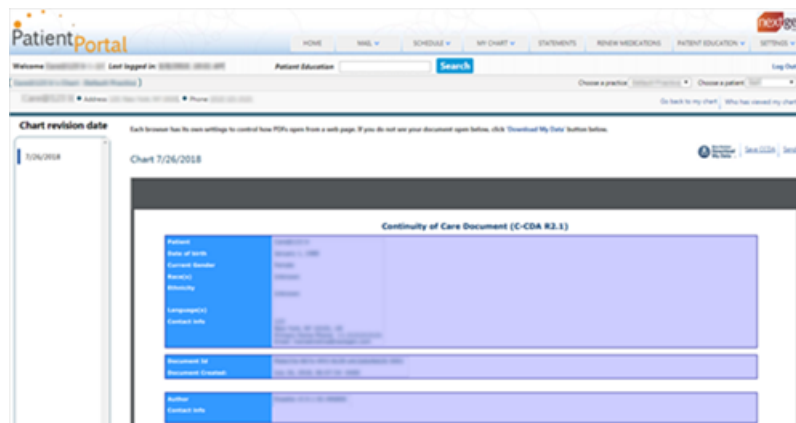
#### Before You Begin

You must have Adobe® Acrobat® Reader installed to view the file.

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**

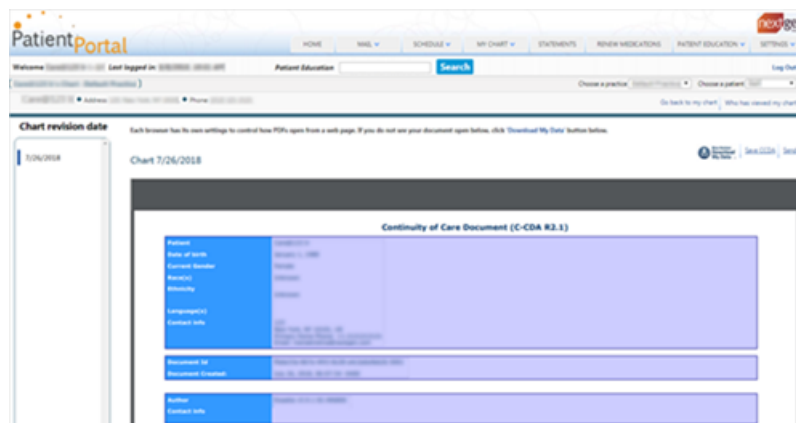


5. Click **Save** and select a folder location.
6. Click **Save**.

### Download PHRs as C-CDA (XML) Documents

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

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




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

## Request Your Personal Health Record

You can request a PHR from a practice. When you receive your PHR, you can view it and save it to a storage device such as a CD, smart card, or USB flash drive.

1. From **My Chart**, click **Request Health Record**.

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

2. If you are enrolled in multiple practices, select the **Practice** to which the request is to be sent.
3. From **Chart Date**, select the chart date range from the following options:
  - To request full PHR or consolidated PHR, select **All**.
  - To request PHR for last 30 days, select **Last 30 Days**.
  - To request PHR for last 60 days, select **Last 60 Days**.
  - To request PHR for current year, select **This Year**.
  - To request PHR for previous year, select **Previous Year**.
  - To request PHR between from and to date, select **Custom**.

**Request Personal Health Record**

**1) Select Practice and Patient**  
Please select the medical practice and the person on which behalf the request will be sent to the practice.

\*Practice:

**2) Select Chart Date**  
Please select the chart range on which behalf the request will be sent to the practice.

\*Chart Date:

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

**SUBMIT**

4. Click **Submit**.

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

## Sending 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. The following links are available for sending PHR:

- I want to search for my provider
- I have my provider's DIRECT access
- I want to send to someone else

**Note:** The links to search for provider and send PHR, send PHR to provider using direct access, and send PHR to third-party using email address are disabled for **Care Managers with View Only** access for their dependents NextGen Enterprise Patient Portal account and an alert message *You have View Only access for your dependent PHR module* appears.

### 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**.

**Patient Portal**

Welcome [User Name] Last logged in: 5/19/2017, 11:32 AM

( [Link to Home] [Link to My Chart] [Link to My Health] [Link to My Profile] )

[Link to My Chart] [Link to My Health] [Link to My Profile] [Link to My Account]

**Chart revision date**

2/20/2017  
10/12/2016  
**5/30/2016**  
5/16/2016

**Send Chart 5/30/2016**

Please select the method that you want to send the chart

I want to search for my provider  
I have provider's direct address  
I want to send it to someone else

2. Search for your provider in any of the following ways:
  - Search by Provider
  - Search by Organization

**Chart revision date**

2/20/2017  
10/12/2016  
**5/30/2016**  
5/16/2016

Back to Send My Chart 5/30/2016 > I want to search for my provider

Search by Provider Search by Organization

Last name, first name:

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**.

Provider/Organization	Specialty	Address	City	State	Zip	Phone
<input type="radio"/> Johnson Family	Orthopedic Surgeon	100 N. Main Street, Suite 100	Chicago	IL	60601-1234	+1-312-555-1234
<input type="radio"/> Johnson Health		200 S. Central Ave, Suite 200	Houston	TX	77002	+1-281-555-5678
<input checked="" type="radio"/> John Smith		300 E. Main	Houston	TX	77002	
<input type="radio"/> Johnson Health		400 S. Central Ave, Suite 300	Houston	TX	77002	+1-281-555-9012
<input type="radio"/> John Doe	Quality Management	500 Main St	Chicago	IL	60601	+1-312-555-3456
<input type="radio"/> Johnson Health		600 S. Central Ave, Suite 400	Houston	TX	77002	+1-281-555-7890

**SEND MY CHART**

## Send Your PHR to a DIRECT Address

### Before You Begin

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**.

The screenshot shows the Patient Portal interface. At the top, it says "Patient Portal" with a logo. Below that, it says "Welcome John Doe MD" and "Last logged in: 5/19/2017, 11:32 AM". There is a navigation bar with links like "Home", "My Chart", "My Health", "My Profile", and "My Account". The main content area is titled "Chart revision date" and shows a list of dates: 2/20/2017, 10/12/2016, 5/30/2016 (selected), and 5/16/2016. To the right of the date list, it says "Send Chart 5/30/2016" and "Please select the method that you want to send the chart". There are three options: "I want to search for my provider", "I have provider's direct address" (which is highlighted), and "I want to send it to someone else".

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  
5/16/2016

Back to Send My Chart 5/30/2016 > I have provider's direct address

+ What is direct address?

\* Provider's DIRECT Address:

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**.

**PatientPortal**

Welcome [User Name] Last logged in: 5/19/2017, 11:32 AM

( Home | My Health | My Chart | My Profile | My Account | My Settings | My Tools | My Alerts | My Messages | My Appointments | My Referrals | My Test Results | My Immunizations | My Medications | My Allergies | My Family | My Social | My Support | My Feedback )

**Chart revision date**

2/20/2017  
10/12/2016  
5/30/2016  
5/16/2016

**Send Chart 5/30/2016**

Please select the method that you want to send the chart

I want to search for my provider

I have provider's direct address

I want to send it to someone else

2. Type the following details:
  - Recipient's e-mail addresses
  - Your message
  - Your password and re-type your password

**Chart revision date**

2/20/2017  
10/12/2016  
5/30/2016  
5/16/2016

Back to Send My Chart 2/20/2017 > I want to send it to someone else

\* Enter email address(es):  
  
*Multiple email addresses must be separated by commas.*

Subject:

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.

\* Password:

× Use 8 or more characters  
 × Must include at least one numeric digit

\* Retype Password:

**SEND MY CHART**

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 Enterprise Patient Portal account.

1. From **My Chart**, click **View My Chart**.
2. Click **Who has viewed my chart**.

Event Date	Logged in Username	Clinical History For	Event Description
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe
12/29/2019	jdoe@nextgen.com	John Doe	Viewed chart history for John Doe

## CHAPTER 8

# Your Statements

You can view your statements or make payments against the statements from the **Statements** tab in NextGen Enterprise Patient Portal.

## Viewing Statements

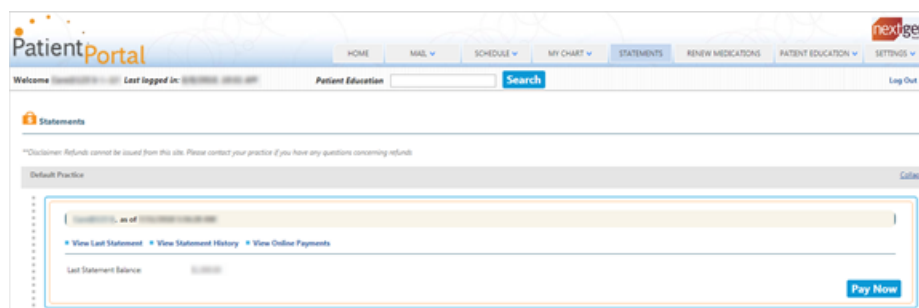
You can opt to receive electronic statements that can be accessed from NextGen Enterprise Patient Portal.

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 Last Statement

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



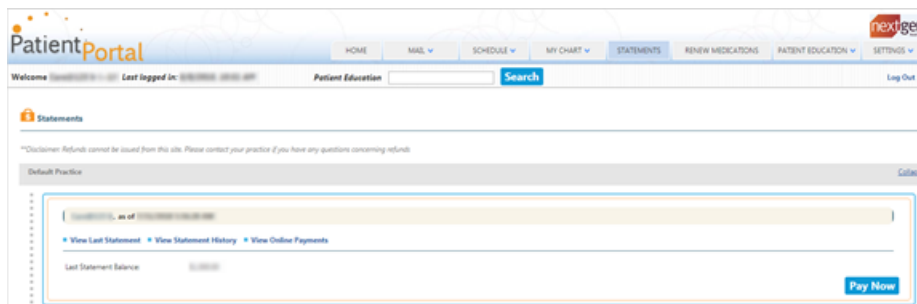
2. Click **View Last Statement**.



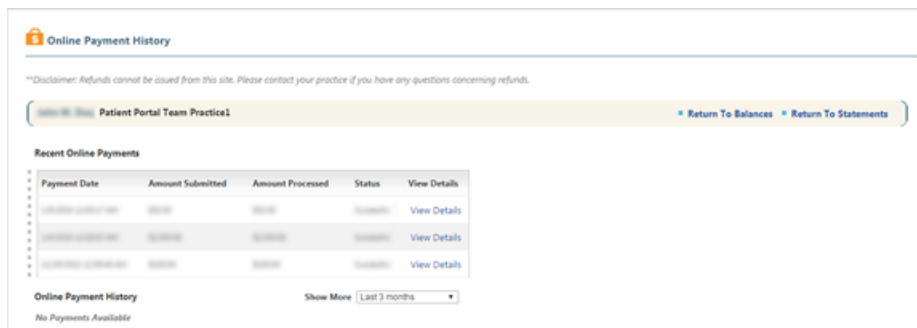
- If you are a care manager and you are managing the dependent account, select the relevant patient.
  - If you want to view statement for a specific date, select the date.
4. Click **View Statement**.
  5. To return to statement page, click **Return to Balances**.

## View Online Payments

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



2. Click **View Online Payments**.

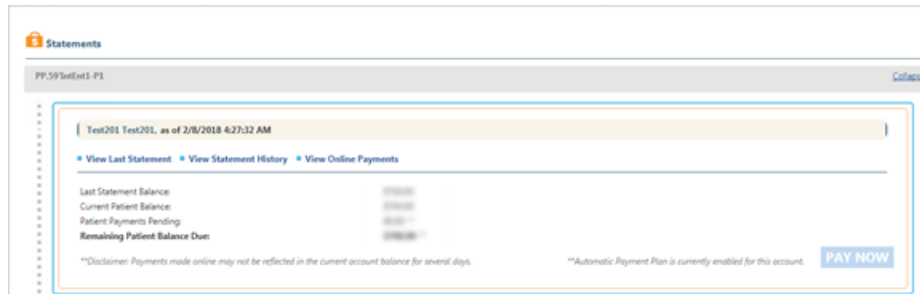


3. From the online details, view the following information:
  - **Payment Date:** date and time the payment was made
  - **Amount Submitted:** amount of submitted payment
  - **Amount Processed:** amount that was processed by the credit card vendor
  - **Status:** status of the payment
  - **View Details:** payment receipt details

## Automatic Payment Collection Plan

Automatic Payment Collection (APC) allows you to make payments automatically on a monthly basis. After the APC plan is approved by your practice, you cannot make payments using the Pay Now feature.

The Automatic Payment Plan is currently enabled for this account message appears on the Statements page to inform you about the status of APC plan.



**Note:** If the credit card used for the APC plan is expired or blocked, then you can make payments using the **Pay Now** feature.

## Opt for an APC Plan

To opt for an APC plan, you must contact the practice and provide your credit card details.

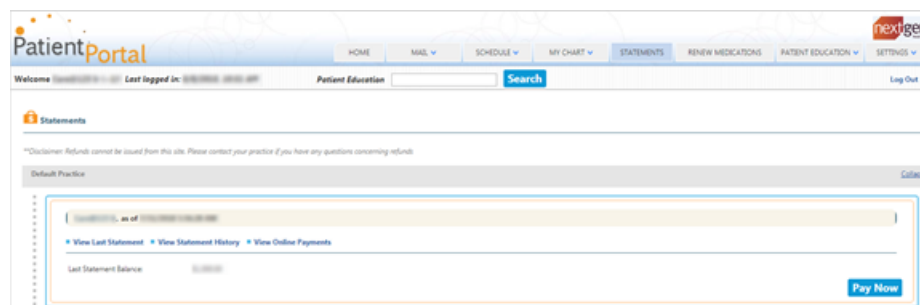
## Making Payments

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

**Note:** The **Pay Now** button is disabled for Care Managers with **View Only** access for their dependent's NextGen Enterprise Patient Portal account and they are not allowed to make payments on behalf of their dependents. If the Pay Now button is not active, it may indicate that you have opted to use an APC plan. For more information about automatic payment plan, see the [Automatic Payment Collection Plan \(on page 72\)](#) section.

## Make Payments

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








2. Click **Pay Now**.

**Make a Payment**

Please select a payment method and then fill in all required information. The billing address selected must match the billing credit card information is not saved or stored by NextGen Patient Portal. Asterisk (\*) denotes required field.

**\*Payment amount:** ☒ Pay Total Due: USD \$5,200.00  
☐ Pay Other Amount: USD \$   
 All amounts in U.S. Dollars.

We accept the following payment methods:

**\*Payment Type:** Select payment type

**\*Cardholder's first name:**

**\*Cardholder's last name:**

**Select a billing address:**


**\*Address line 1:**

**Address line 2:**

**\*City:**


**\*State:**

**\*Zip:**  -

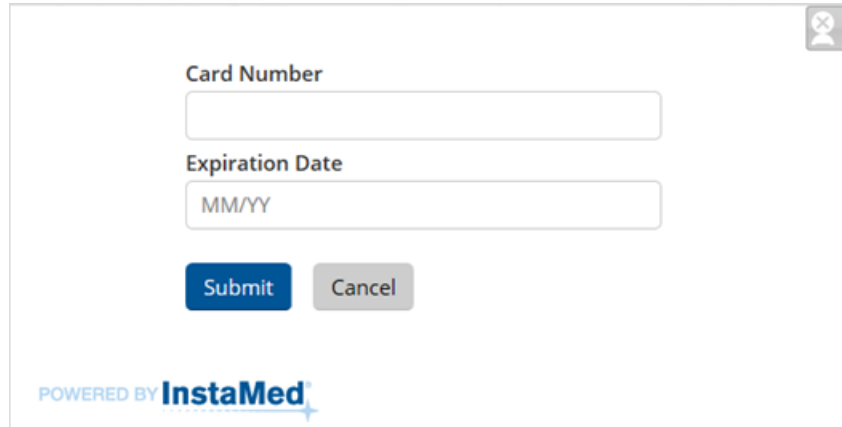
 This is an electronic copy of your statement. A paper copy has also been mailed to you. If you pay this statement online, please disregard the paper copy.

**Submit**

powered by Instamed

 **Note:** Based on your practice configuration, you can make payment using TSYS-Central , TSYS - Transaction Express, or InstaMed® 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 from **Credit Card** or **Echeck**.
  - If you have selected **Credit Card**, enter the following information and click **Submit**.
    - Credit Card Number
    - Expiration Date



Card Number

Expiration Date


MM/YY

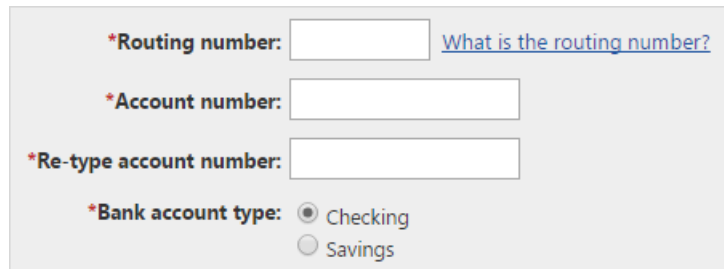
Submit Cancel

POWERED BY InstaMed

- If you have selected **Echeck**, type the following information:

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

 **Note:** The bank routing number is the nine digits 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. 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


By default, the system displays the logged in user's first and last name in the Cardholder's name fields.

Also, you can also perform any of the following:

- If you want to update your first name and last name, type your first name and last name.
- If you want to change your billing address, from **Select a billing address**, select **Enter a different billing address**, and type the following details:
  - Address lines
  - City
  - State
  - Zip

5. 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 the transaction to be posted and appear on your statement.

6. To print the receipt, click **Print this receipt**.

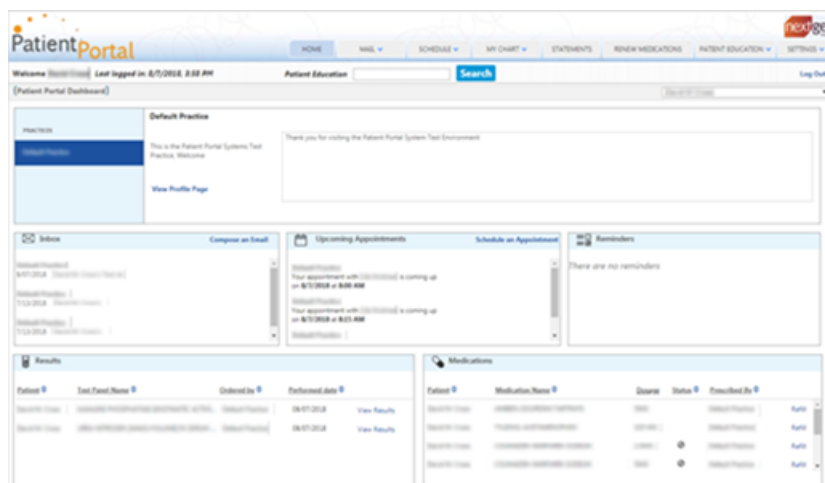
## CHAPTER 9

## Your Lab Results

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

### Viewing Lab Results Details from the Home Page

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



### Sorting Lab Results in the Results Section

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

### Sorting data on home page

Additionally, you can also click the arrow next to each column header to sort the information in the section.

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

Icon	Description
▼	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** opens, providing a direct link (View Document) to the PHR document that contains the selected lab results.

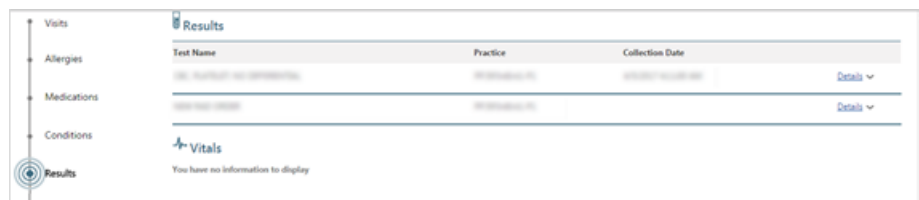
The following information appears in **Results: Not Available Within My Chart**:

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

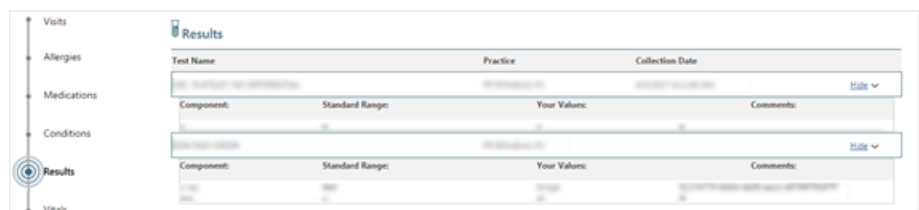
## View Lab Results Details from My Chart

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 Enterprise Patient Portal home page, click **My Chart**, and then click **View My Chart**.



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

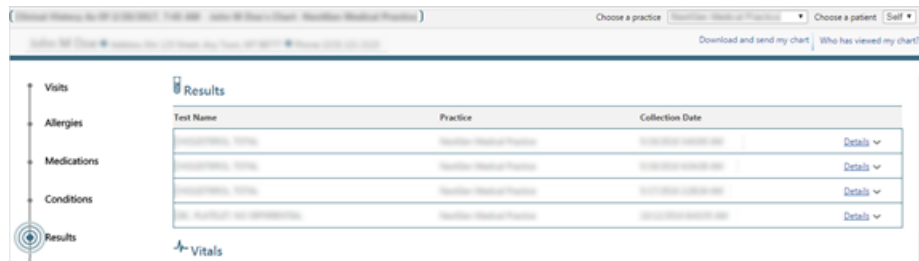


You can view your consolidated lab results details.

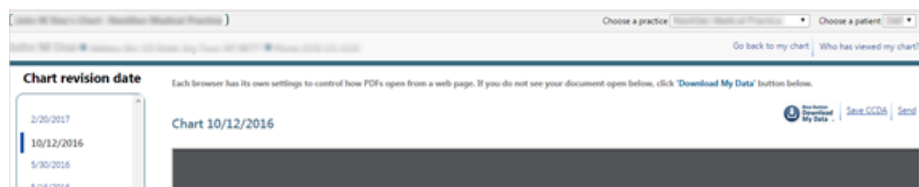
## View Lab Results

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

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



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



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

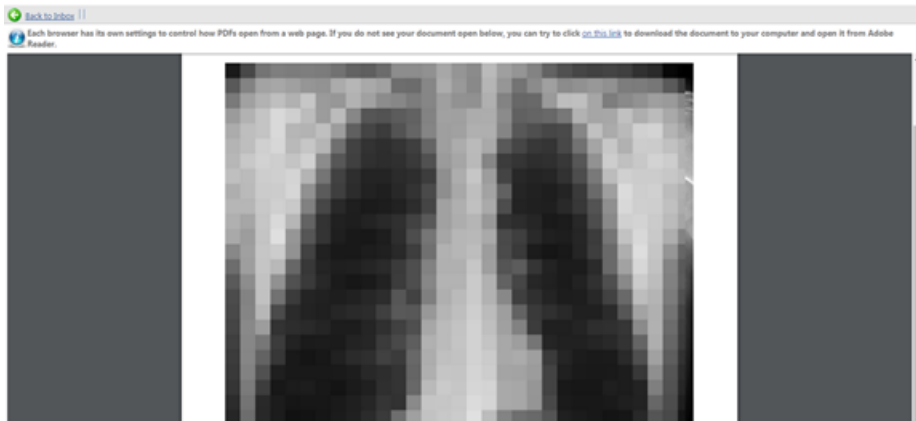
## View Radiology Results

You can view your radiology results from 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 Enterprise Patient Portal home page, click **Mail** tab, and then click **Inbox**.



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



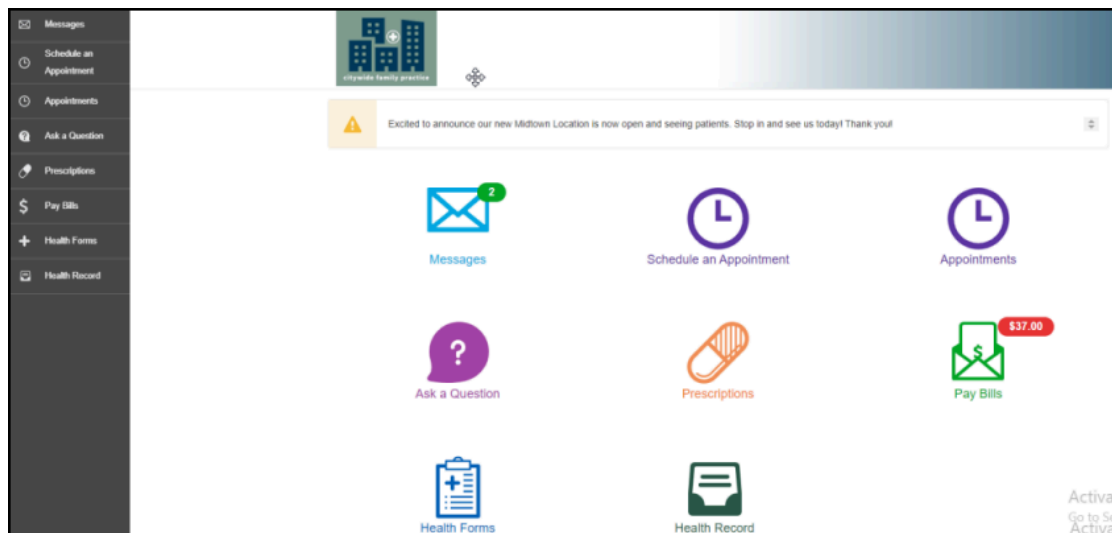
## CHAPTER 10

## Your Medications

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

### Viewing Medications on the Home Page

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



### Sorting Medications in the Medications Section

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

### Renew Medications

NextGen Enterprise 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 Enterprise Patient Portal home page, do one of the following:
  - Click **Renew Medication**.
  - Under **Medications**, click **Refill**.
2. On the **Renew Medications** form, under **Select Your Medical Practice** perform the following tasks:

- a. From **Practice**, select the practice to renew your medication.
- b. From **Patient**, select any one of the following:
  - Self: to request medication renewal on your own behalf
  - Dependent name: to request medication renewal on behalf of a dependent, select the name of the dependent

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

\*Practice:

\*Patient:

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

[Print Medications](#)

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

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

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

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

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

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

**Selected Medication(s):**

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

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

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

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

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

**SELECT** **CANCEL**

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

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

**Selected Medication(s):**

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

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

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


	Prescription Name	Dose	Description	Start Date	Stop Date
<input type="checkbox"/>	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	12/15/2019	12/15/2020
<input type="checkbox"/>	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	12/15/2019	12/15/2020
<input type="checkbox"/>	AMOXICILLIN	500MG	AMOXICILLIN 500MG TABLETS	12/15/2019	12/15/2020

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

**SELECT** **CANCEL**

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

☐ **Yes, I would like to request the above inactive medication**

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

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

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

**Selected Pharmacy:**

Pharmacy Name:

Address:

Phone Number:


Fax Number:

[Select different pharmacy](#)

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

[Select different pharmacy](#)

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

 **Note:** If you want to add new pharmacy, see [Add a new Pharmacy \(on page 85\)](#).

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

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

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

- Indicates a pharmacy that can be modified

Search Results (4 record returned)

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

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

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

11. Click the pharmacy's name to select it.
12. To set the default pharmacy, select **Set as your NextGen Patient Portal preferred pharmacy**.
13. Click **Select**.
14. Under **Submit Renewal**, perform the following:
  - 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.

4) Submit Renewal

Select Reason and Provider for this medication refill.

\*Reason:

\*Send to:

Comments:

Maximum length: 500 characters

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

**SUBMIT**

15. Click **Submit**.

**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**.

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

## Add a New Pharmacy

You can add a new pharmacy if the pharmacy of your choice does not appear in the pharmacies list.

1. Under **Select Pharmacy**, click **Select different pharmacy**.

2. Click **Add New**.

3. Enter the pharmacy details, and click **Save**.

### Note:

- The **Pharmacy name** field can contain maximum 70 characters.
- A field name with a red asterisk is a required field.

The newly added pharmacy appears at the top of the list. The **Modify Pharmacy** icon appears next to the pharmacy name.


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

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

## CHAPTER 11

# Health Education Materials

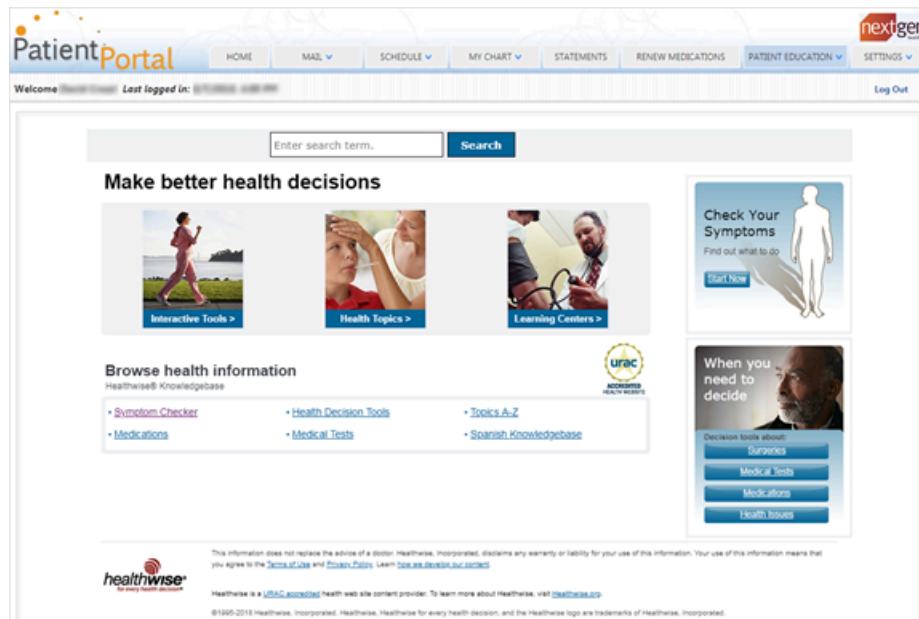
You can get health education material from the **Patient Education** tab. The patient education provides you access to Healthwise® Health Information Knowledgebase, which is an online health encyclopedia. You can access educational materials on a variety of patient education, symptom checker, medications,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

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

## Search for Health Education Topics

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

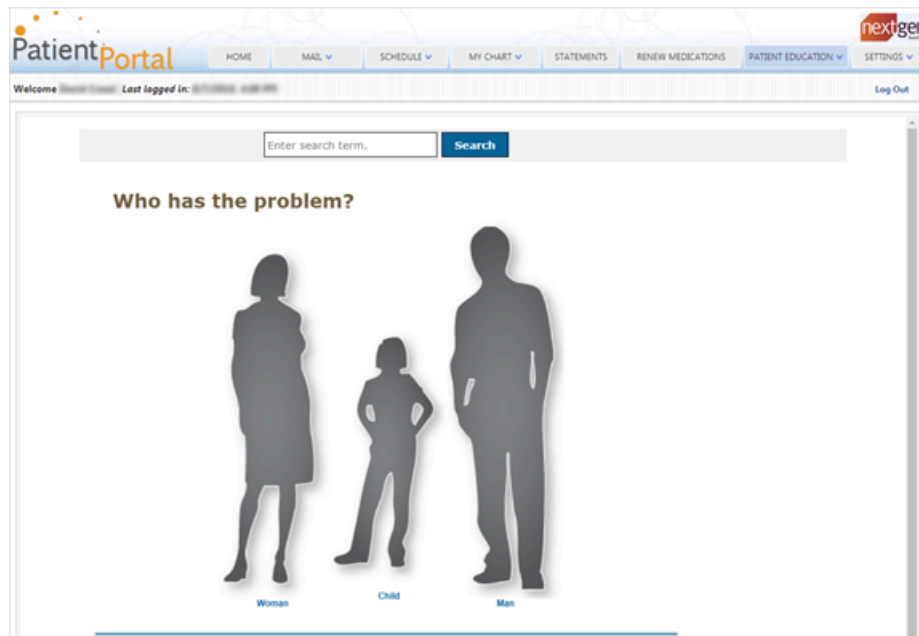
1. On the NextGen Enterprise Patient Portal home page, click **Patient Education**, and then select **Patient Education**.
2. You can perform the following tasks:
  - *Search health topics:* The search feature enables you to research health topics. If you received a Healthwise Patient Instruction handout 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.

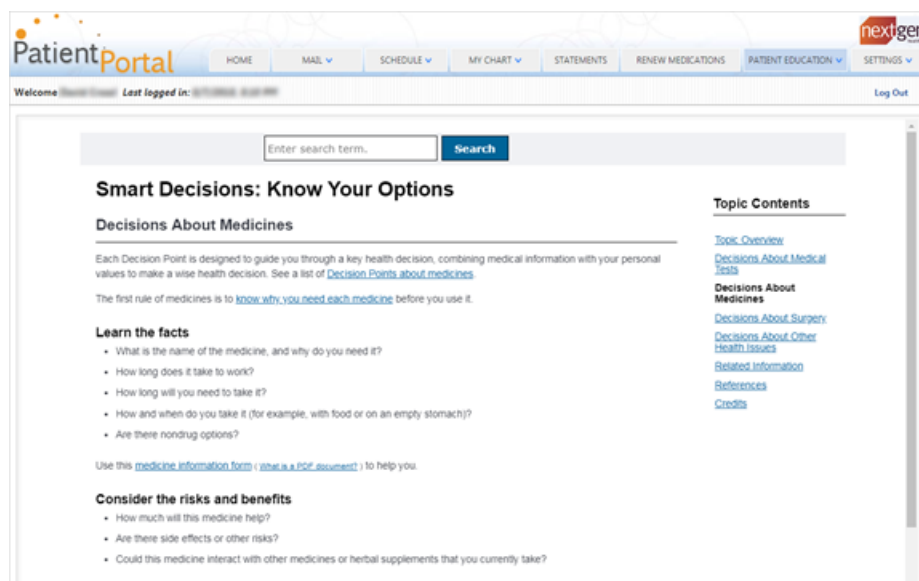
1. On the NextGen Enterprise Patient Portal page, click **Patient Education**, and then select **Symptom Checker**.
2. You can type the symptom and find the symptom related problems.



## Read about Your Medication

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

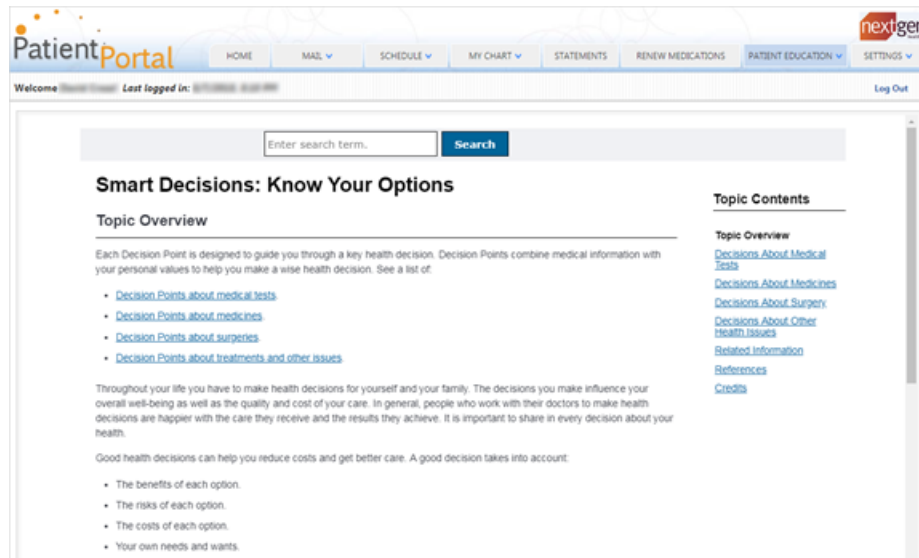
1. On the NextGen Enterprise Patient Portal home page, click **Patient Education**, and then click **Medications**.
2. Type the medication search term, and then click **Search**.



## 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 Enterprise Patient Portal home page, click **Patient Education**, and then select **Health Decision Tools**.
2. Type your problem, and then click **Search**.



## CHAPTER 12

# Settings

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

## Account Settings

**Account Settings** allow you to:

- Change the username
- Change the password
- Select security questions and provide answers for them
- Choose preferred notifications method
- View and update the account email address
- Unenroll from NextGen Enterprise Patient Portal
- Verify your account using Google Authenticator

## Change Username

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.
2. From **Username**, click **Edit**.

**Account Settings**

Username	<a href="#">Edit</a>
Your Username	
Password	<a href="#">Edit</a>
Your Password	
Security Question	<a href="#">Edit</a>
Preferred Notification Method	
+ [Practice Name]	Practice: [Practice Name] <a href="#">Edit</a>
Account Email	<a href="#">Edit</a>
Verified Email	
Un-enroll from Patient Portal	<a href="#">Edit</a>
Delete your Patient Portal account	
Google Authenticator	<a href="#">Edit</a>
Protect your account with Google Authenticator	

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

- Type your new username.
- Re-type your new username.

**Account Settings**

Username	<a href="#">Hide</a>
Your Username	
Username must be between 6 and 50 characters.	
* New username:	<input type="text"/>
* Retype username:	<input type="text"/>
<a href="#">Submit</a>	

**Note:** Your current username should comply with the [latest username policy \(on page 9\)](#).

4. Click **Submit**.

You will receive a notification email to your verified email address that notifies you that the username for your account has been changed.

## Change Password

- On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.
- From **Password**, click **Edit**.

**Account Settings**

Username	<a href="#">Edit</a>
Your Username	
Password	<a href="#">Edit</a>
Your Password *****	
Security Question	<a href="#">Edit</a>
Preferred Notification Method	
+ [Notification Method]	Practice: [Practice Name] <a href="#">Edit</a>
Account Email	<a href="#">Edit</a>
Verified Email	
Un-enroll from Patient Portal	<a href="#">Edit</a>
Delete your Patient Portal account	
Google Authenticator	<a href="#">Edit</a>
Protect your account with Google Authenticator	

3. Under the **Password** details, do the following:
  - a. Type your new password.
  - b. Re-type the new password.
  - c. Type your current password.

**Password** [Hide](#)

Your Password \*\*\*\*\*

\* New password:

x Use 8 or more characters  
 x Use upper and lower case letters (e.g. Ba)  
 x Use a number (e.g. 1234)  
 x Use a [special character](#) (e.g. \$^%)  
 x Avoid including commonly used passwords (e.g. 'password')

\* Retype password:

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

\* Current password:

**Submit**

**Note:** Your current password should comply with the [latest password policy \(on page 9\)](#).

4. Click **Submit**.

You will receive a notification email to your verified email address that notifies you that the password for your account has been changed. The next time when you log on to NextGen Enterprise Patient Portal, you must use your new password.

## Merge Accounts from Account Settings

Merging your account helps you to access all your account details with a single logon. If you have not merged your accounts at the logon process, you can do it from the **Account Settings** page. At a time, you can merge only one account with the current account (which you are logged on to).

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.

**Account Settings**

---

Username [Edit](#)  
Your Username

---

Password [Edit](#)  
Your Password

---

Security Questions [Edit](#)

---

Preferred Notification Method [Edit](#)  
☐ Email ☐ Text ☐ Push ☐ Phone

---

Account Email [Add](#)  
Verified Email

---

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

---

Google Authenticator [Edit](#)  
Protect your account with Google Authenticator

---


Merge Accounts [Edit](#)  
If you have more than one account with Patient Portal, you can merge the accounts here.

2. From **Merge Accounts**, click **Edit**.

3. Select the account that you wish to merge with your current account and click **Next**.
4. Type the username and password for the account you wish to merge with your current account and click **Submit**.

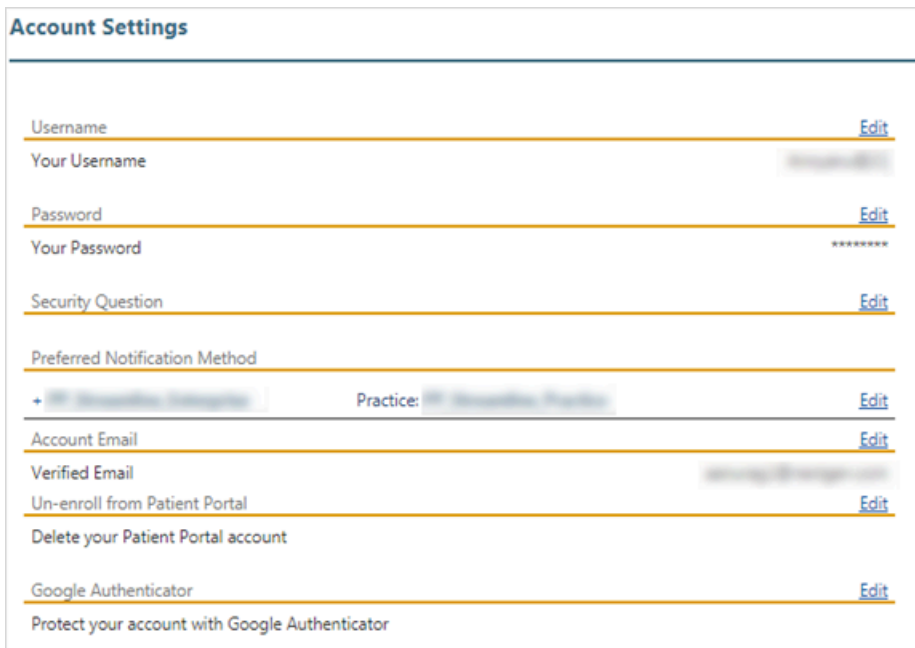
**Note:** You will get three attempts to provide your credentials of the account you would like to merge with the current account. Unsuccessful attempts will redirect you to your NextGen Enterprise Patient Portal home page. You will get a notification message stating that the accounts cannot be merged and you can reset your account credentials of the account you wish to merge with your current account.

5. Click **Yes** to confirm for merging accounts.  
The **Merge Accounts** section displays that your accounts have been merged. You will also receive an email notification to your verified account email address when you merge your accounts.

 **Note:** The additional practice name will be listed under the **Preferred Notification Method** section in the **Account Settings** page and the **Practices** list in your NextGen Enterprise Patient Portal home page. Now you can access all your medications, messages, medications from your home page.

## Change Security Questions

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.
2. From **Security Question**, click **Edit**.



The screenshot shows the 'Account Settings' page with the following sections and links:

- Username**: [Edit](#)
- Your Username
- Password**: [Edit](#)
- Your Password
- Security Question**: [Edit](#)
- Preferred Notification Method**:
  - + [Add Additional Contact](#) Practice: [Add Additional Practice](#) [Edit](#)
- Account Email**: [Edit](#)
- Verified Email**
- Un-enroll from Patient Portal**: [Edit](#)
- Delete your Patient Portal account
- Google Authenticator**: [Edit](#)
- Protect your account with Google Authenticator

3. Under the **Security Question** details, select each security questions and type the relevant answer and update, as needed.

Security Question [Hide](#)

Please select five unique security questions, then enter your answers for each.

\* Security question 1: What is your maternal grandmother's first name? ▼

\* Answer 1:

\* Security question 2: In what city were you born? ▼

\* Answer 2:

\* Security question 3: In what city was your high school? ▼

\* Answer 3:

\* Security question 4: What is your mother's middle name? ▼

\* Answer 4:

\* Security question 5: In what city is your vacation home? ▼

\* Answer 5:

**Submit**

4. Click **Submit**.

You will receive an email notification to your verified account email address that notifies you that your security questions related information has been changed.

## Change Preferred Notification Method

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.

Account Settings

Username [Edit](#)

Your Username

Password [Edit](#)

Your Password

Security Question [Edit](#)

Preferred Notification Method

+ Add New Notification Method Practice: [Edit](#)

Account Email [Edit](#)

Verified Email

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

Delete your Patient Portal account

Google Authenticator [Edit](#)

Protect your account with Google Authenticator

2. From **Preferred Notification Method**, click **Edit**.

3. Do any one of the following:

- Click **Delete** next to an existing email address or mobile number.

- Select **Receive notifications at this e-mail address** to set your email for preferred notifications.

4. Click **Update**.

## Verify Email Address for Account Settings Notification

You can get notifications related to your account such as username, password reset, and other account management activities through account email.

In addition, you can perform any one of the following:

- Add your account email address
- Update your existing account email address
- Set email as Preferred Notification Method
- Set email address to receive notification for any updates

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.


2. From **Account Email**, click **Edit**.

3. From **E-mail address**, you can view and update your email address.

4. You can set the following options:

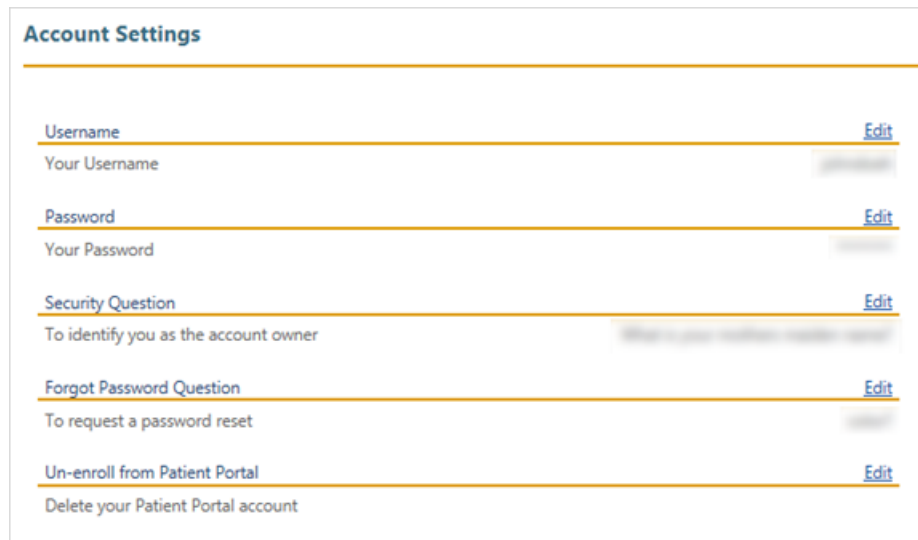
- To set the email address as preferred notification method, select **Add it to Preferred Notification Method**.
- To set the email address to receive notification for any updates related to account settings, select **Receive notification at this email address**

5. Click **Update**.

 **Note:** If you are adding an account email address or updating your existing account email address, a notification appears on the top of the page indicating an email has been sent to your email address. Open the email and validate your email address.

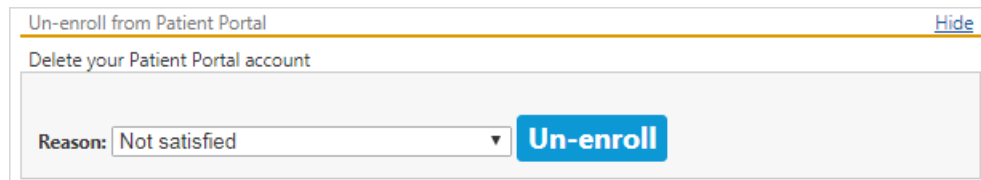
## Cancel your NextGen Enterprise Patient Portal Enrollment

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.
2. From **Un-enroll from Patient Portal**, click **Edit**.



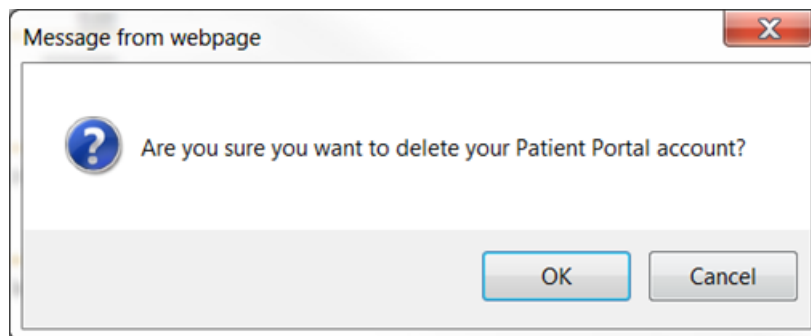
Account Settings	
Username Your Username	<a href="#">Edit</a>
Password Your Password	<a href="#">Edit</a>
Security Question To identify you as the account owner	<a href="#">Edit</a>
Forgot Password Question To request a password reset	<a href="#">Edit</a>
Un-enroll from Patient Portal Delete your Patient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

3. From **Reason**, select a reason for un-enrolling from NextGen Enterprise Patient Portal.
4. Click **Un-enroll**.



Un-enroll from Patient Portal [Hide](#)  
Delete your Patient Portal account  
Reason: Not satisfied ▼ Un-enroll

5. Click **OK**.

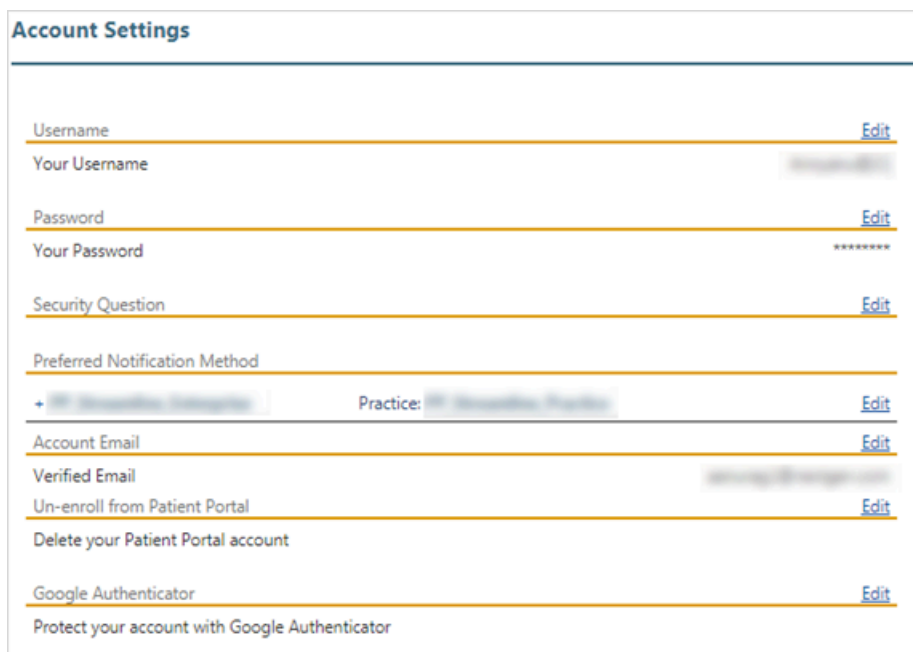


6. Click **OK** to un-enroll your NextGen Enterprise Patient Portal account.

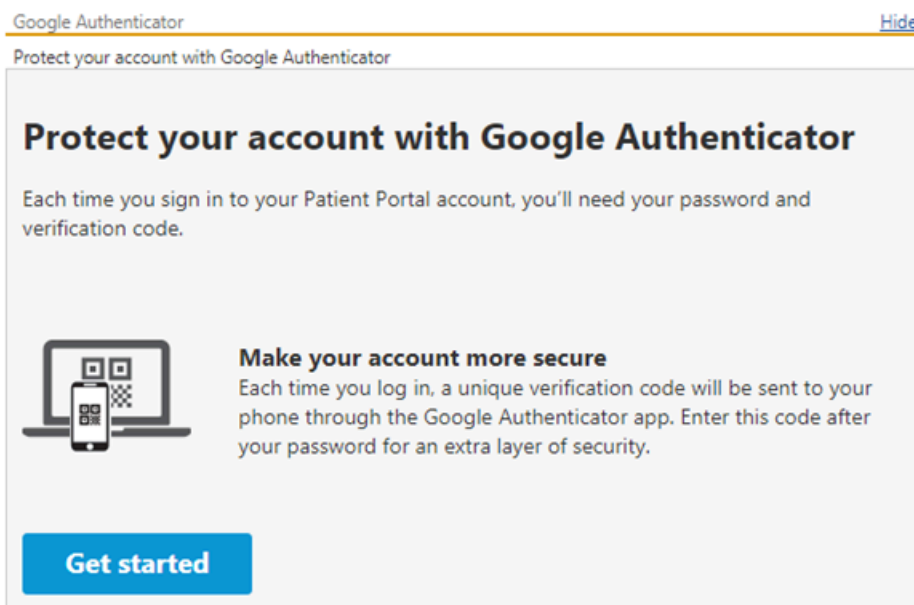
## Google Authenticator

You can secure your NextGen Enterprise Patient Portal account using Google Authenticator.

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.



2. Under **Google Authenticator**, click **Edit**.



For more information about Google Authenticator, see the [Use Google Authenticator to Secure your Account \(on page 15\)](#) section.

## 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 Enterprise 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 Enterprise 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 Enterprise Patient Portal home page, click **Settings**, and then select **Manage User Grants**.

**Manage User Grants**

Who Manages My Account?

[User Name]	<a href="#">Edit</a>
-------------	----------------------

Accounts I Manage

[User Name]	<a href="#">Edit</a>
-------------	----------------------

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

**Manage User Grants**

Who Manages My Account?

[User Name] [Hide](#)

Practice: [Practice Name] Expiration Date: [Expiration Date]

☐ Allow [User Name] to have full access on my account.

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

Access expires: ☐ [Calendar Icon] ☒ Never expires

**SUBMIT CANCEL DELETE**

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

3. To assign Care Manager access to individual modules, perform the following:
    - Clear **Allow full access to my account**.
    - To give view permission, for a particular module, select **View**.
    - To give permission to complete or send a module on Manage User Grants, select **Send/Complete** column next to **Module** name.
  4. To set a user grant date for your account:
    - a. Click **Access expires**.
    - b. Click **Calendar** and select the date.
- Note:** 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**.

## Delete Dependent Accounts as a Care Manager

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 Enterprise Patient Portal home page, click **Settings**, and then select **Manage User Grants**.
2. Under **Account I Manage**, click **Edit** to view their rights and permissions.

**Manage User Grants**

Who Manages My Account?

No one else is managing your account.

Accounts I Manage [Hide](#)

Practice:  Expiration Date:

Full Access: ☐

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

**DELETE**

3. Click **Delete**.

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

A confirmation message appears.

4. Click **OK**.

## Manage Practices

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

## Enroll in Multiple Practices Within an Enterprise

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

1. Log on to your NextGen Enterprise Patient Portal account .
2. Select a new practice name.

3. Click **Add Selected Practice(s)**. The selected practices are added to your account and you can view your practice on the home page and Manage Practices page.
4. 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. 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 Enterprise Patient Portal home page, click **Settings**, and then select **Manage Practices**.


2. Click **Add this practice to my account**.

3. Click **Complete Enrollment**.

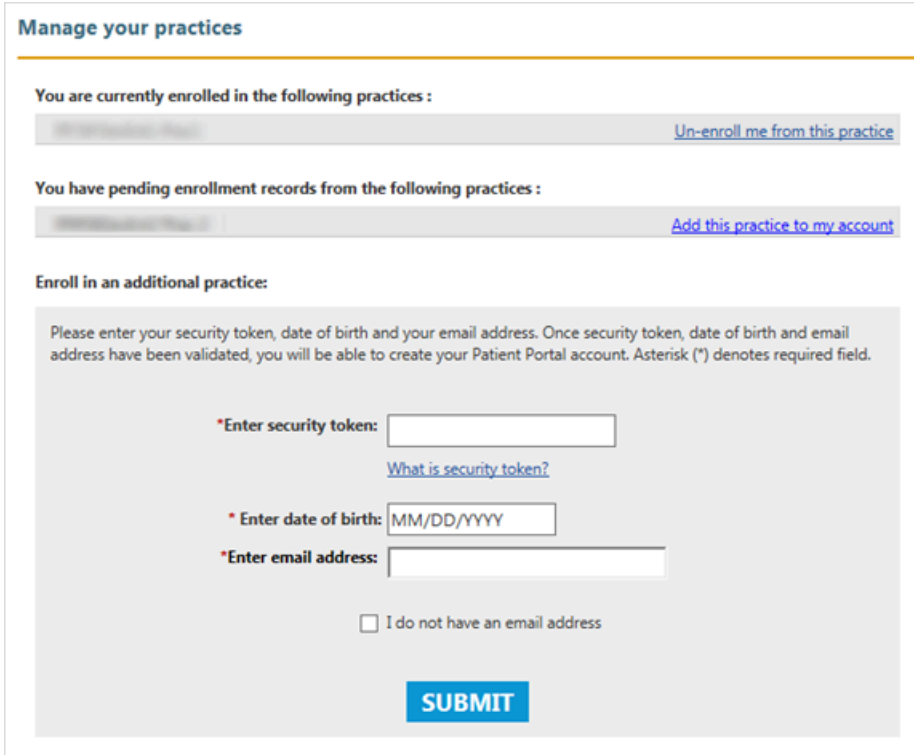
 **Note:** Click **Decline Pending Enrollment** if you do not want to enroll to a practice(s). If you decline enrollment, you must request the practice to provide a security token to enroll again.

## Enroll in another Practice

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

 **Note:** The patient should inform the new practice that they already have a NextGen Enterprise Patient Portal account.

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



**Manage your practices**

---

You are currently enrolled in the following practices :

Practice Name	<a href="#">Un-enroll me from this practice</a>
---------------	---

You have pending enrollment records from the following practices :

Practice Name	<a href="#">Add this practice to my account</a>
---------------	---

**Enroll in an additional practice:**

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

\*Enter security token:

[What is security token?](#)


\* Enter date of birth:

\*Enter email address:

☐ I do not have an email address

**SUBMIT**

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

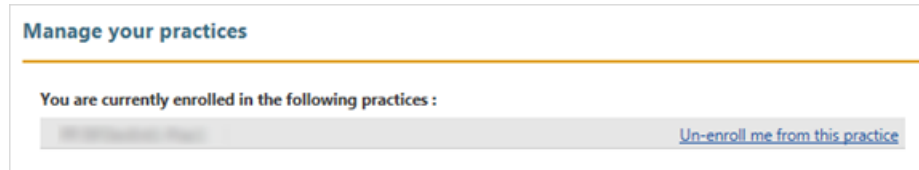
 **Note:** If you do not have an email address click **I do not have an email address**, and then enter your last name.

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

## Un-enroll from NextGen Enterprise Patient Portal

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

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



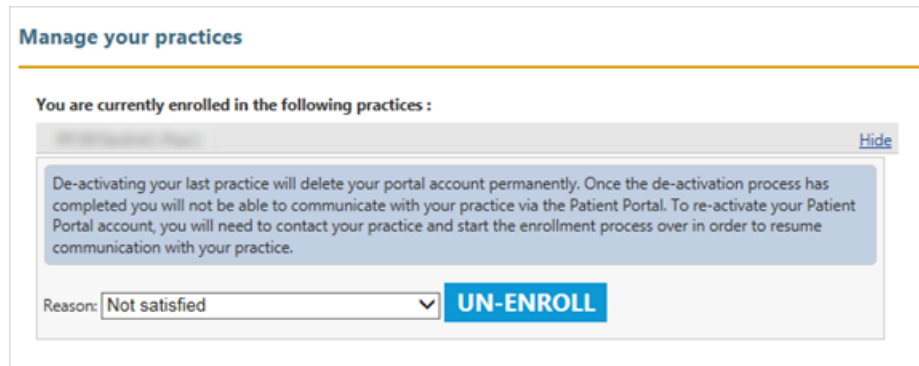
**Manage your practices**

---

You are currently enrolled in the following practices :

Practice Name	<a href="#">Un-enroll me from this practice</a>
---------------	---

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



**Manage your practices**

---

You are currently enrolled in the following practices :

Practice Name	<a href="#">Hide</a>
---------------	----------------------

De-activating your last practice will delete your portal account permanently. Once the de-activation process has completed you will not be able to communicate with your practice via the Patient Portal. To re-activate your Patient Portal account, you will need to contact your practice and start the enrollment process over in order to resume communication with your practice.

Reason:  **UN-ENROLL**

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 Enterprise Patient Portal account.

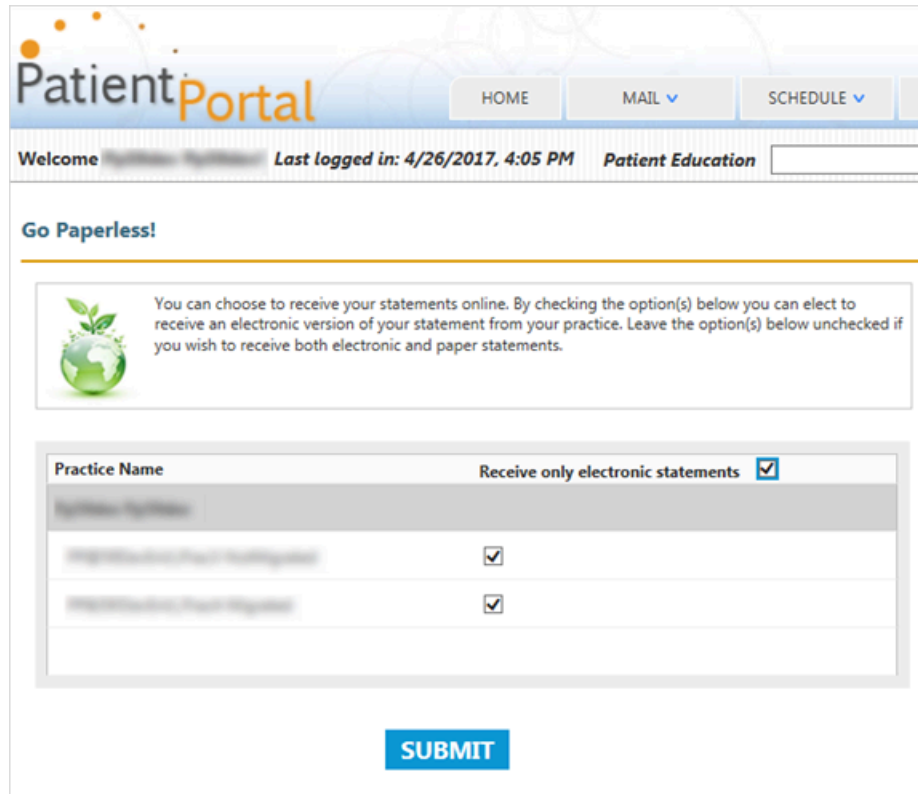
**Note:** A practice can unenroll you if you have not visited your practice for a long time or you have not logged on to your NextGen Enterprise Patient Portal account for long time. If your practice un-enrolls you, you would receive an email notification for the unenrollment to your verified account email address. You must contact the practice to re-activate your account.

## Manage Statement Notifications

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

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

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



**PatientPortal** HOME MAIL SCHEDULE

Welcome [Name] Last logged in: 4/26/2017, 4:05 PM Patient Education

**Go Paperless!**


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

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

**SUBMIT**

2. Perform one of the followings:

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

 **Note:** 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 13

## Troubleshooting

Use this troubleshooting section when you need answers to common problems that you may encounter for the following:

- [Locked Accounts \(on page 107\)](#)
- [Recover Username \(on page 107\)](#)
- [Reset Password \(on page 108\)](#)
- [Reset Password with a Reset Token \(on page 108\)](#)

### 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 3 unsuccessful attempts.

You cannot access your NextGen Enterprise Patient Portal account once your account is locked. You can click **Forgot username**, **Forgot password**, or **I have my password reset token** to recover your logon details from your NextGen Enterprise Patient Portal logon page. Your account will be automatically unlocked 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.

### Viewing 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 Username

If you have a verified account email address or notification email address, you can recover your username using the **Forgot username** link. If you do not have either a verified account email address or notification email address, you must contact your practice to recover your username.

1. On the logon page, click **Forgot username**.

2. Type your verified account email address.
3. Click **Submit**.

 **Note:** If you do not have a verified account email address, type your notification email address and click **Submit**. Then, you must type your **Last Name, Date of birth (mm/dd/yyyy)** and click **Submit**.


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

4. Open the email to view your username.

## Reset Password


If you have a registered email address, you can reset your password using the **Forgot Password** link. If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username and security questions.

1. On the logon page, click **Forgot password**.
2. In **Email or Username**, type your username or verified email address.

 **Note:** If you have not provided your email address during enrollment and have not verified your NextGen Enterprise Patient Portal account, you must remember your valid username and security questions. The system will ask you to answer *two* security questions that you have already set up. You will get *three* attempts to give the security answer for each of the *two* questions. Answering the correct answers will redirect you to the **Reset Password** page. Unsuccessful attempts will lock your account for 20 minutes. For more information about locked account, see the [Locked Accounts \(on page 107\)](#) section.


3. Click **Submit**.

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

 **Note:** If you are using email address to recover your password but you are not receiving email, computer will ask to type your username.

4. Open the email you received and click **Password Reset**.
5. On the **Reset Password** page, do the following:
  - a. Type your password
  - b. Re-type your password
6. Click **Submit**.


The NextGen Enterprise Patient Portal home page opens.

 **Note:** The reset password link in the email expiration is subject to your practice settings. Your password validity is provided in the password reset email. Password recovery email is unique to your verified account email.

## Reset Password with a Reset Token

If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username. To get a password reset token, contact your practice.


1. On the logon page, click **I have my password reset token**.
2. In the **Forgot Password** page, do the following:
  - a. Type the token number provided by your practice
  - b. Type your username
3. Click **Submit**.

 **Note:** If you have not registered your email address, type your email address, and click **Submit**. If you do not wish to provide email address, select **I do not wish to provide an email address**.

4. On the **Reset Password** page, do the following:
    - a. Type your password
    - b. Re-type your password
  5. Click **Submit**.
- The NextGen Enterprise Patient Portal home page opens.

## *Reset Password without a UAE and Security*

If you have not verified your email address or set up the five security questions, then you can reset your password only once by validating your identity using the **Forgot Password?** link. If you have reset your password using this option already but have not logged on to authenticate your account then, the system will direct you to obtain a password reset token from your practice.

1. On the logon page, click **Forgot Password**.
  2. In **Email** or **Username**, type your username or email address.
  3. Click **Submit**.
  4. On the **Verify your Account** page, enter the following:
    - Username
    - Date of birth in mm/dd/yyyy format
    - Last name
    - First name
    - Home phone number
-  **Note:** If home phone number is not available, you can enter any phone number provided during enrollment.
5. Click **Next**.
  6. On the **Address Verification** page, select your correct address, and click **Next**.
  7. On the **Reset Password** page, do the following:
    - Type your password
    - Re-type your password
  8. Click **Submit**.

The NextGen Enterprise Patient Portal logon page opens. You can log on using the new password.

## CHAPTER 14

# *NextGen Enterprise Patient Portal Mobile*

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

## *Supported Devices*

For the mobile website, mobile devices running on Android <sup>™</sup> 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 Enterprise Patient Portal Mobile's security policies.


## *Supported Browsers*

For mobile websites, the following browsers are supported:

- Microsoft<sup>®</sup> Internet Explorer<sup>®</sup> 11.0 or later
- Apple Safari
- Mozilla Firefox
- Google Chrome browser

## *System Requirements*

To view PDF documents sent from the practice, you need the Adobe<sup>®</sup> Acrobat<sup>®</sup> Reader. You can download the latest version of the Adobe Acrobat Reader from the [Adobe reader website](#).

 **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.

## *Accessing NextGen Enterprise Patient Portal Mobile*

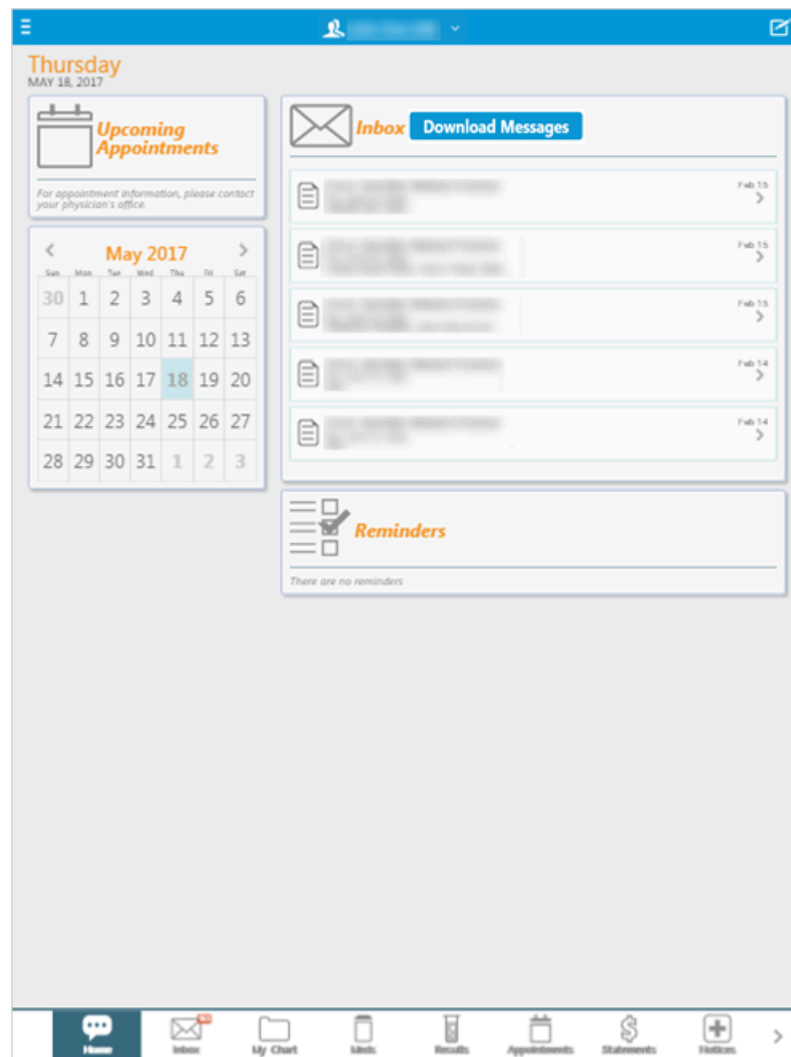
The NextGen Enterprise Patient Portal mobile website is accessible, if you are enrolled in the NextGen Enterprise Patient Portal.

You do not have to download any mobile application to access the NextGen Enterprise 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 Enterprise Patient Portal mobile site.

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













## NextGen Enterprise Patient Portal Mobile Home Page

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



## Navigate NextGen Enterprise Patient Portal Mobile

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

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

## Download Inbox Items from NextGen Enterprise Patient Portal Mobile

You can download the following inbox items from the NextGen Enterprise Patient Portal mobile site to your mobile.

- Documents
- Statements
- Medications
- Messages
- Personal Health Records

While downloading, the inbox items and their attachments are converted to PDF files, and packaged as a zip file.

1. [Log on to the NextGen Enterprise Patient Portal mobile site. \(on page 110\)](#)  
The NextGen Enterprise Patient Portal mobile home page opens. For more information, see [NextGen Enterprise Patient Portal Mobile Home Page \(on page 111\)](#).
2. Tap **Download Messages**.  
A page opens with the filters for downloading the inbox items.

3. To set the filter criteria for the download, do the following:
  - a. Select the practice.  
The **Practice** list displays the names of all the practices in which the patient has enrolled. **All** is selected by default.
  - b. From the **To** list, select the patient's name.  
The **To** list displays the names of the patient and dependents. **All** is selected by default.
  - c. From **Type**, select the inbox item type which you want to download.  
**All** is selected by default.
  - d. To set a date range, use the **From** and **To** calendars.
4. Tap **Download Messages**.  
A message appears indicating that it may take some time to complete the download, and that patient portal activities might be interrupted while the download is in progress.
5. Do one of the following:
  - Tap **No** to stop the download.
  - Tap **Yes** to download the inbox items.

A zip file with the name ExportedMessages\_<date of download><time of download> is downloaded to your mobile.

The zip file is password protected. The password hint appears on the filters page.

**⚠ CAUTION:** You can download up to 100 inbox items at a time. If the number of inbox items for the set filter criteria is more than 100, a message appears on a separate tab indicating that there are more than 100 items for the set filter criteria, and prompting you to modify the filter criteria to download again.

**📄 Note:** When a download is in progress, the **Download Messages** button on the filters page is disabled.

## *Document Revision History*

Release Name	Date	Document Version	Summary of Changes
5.0	01/07/2021	1.0	Initial Release