## Document Revision History

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CHAPTER 1

Introduction

This NextGen® Patient Portal Patient User Guide explains how to use the features and functions found on NextGen Patient Portal. NextGen Patient Portal is now available for both desktop and mobile or tablet users. For information about NextGen Patient Portal Mobile, see "NextGen Patient Portal Mobile" on page 101.

The intended users of this guide are patients enrolled to use NextGen Patient Portal.

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

This section provides an overview of NextGen Patient Portal, requirements, and other related information.

Overview

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

- 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 Instant Medical History forms
- Request Personal Health Records (PHRs)
- 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:** Because practices can customize NextGen Patient Portal to meet their requirements, some of the features listed above and described throughout this document may not be available in your NextGen Patient Portal account.
Web Browser Requirements

NextGen Patient Portal works best with the following browsers that come with 128-bit Secure Sockets Layer (SSL) encryption:

- Microsoft® Internet Explorer 8.0 and higher
- Mozilla Firefox® 2.0 and higher

**Note:** NextGen Patient Portal also supports Google Chrome and Opera.

Most browsers, which are currently available, support 128-bit SSL encryption (which is a way of making information secure). To determine if your browser supports 128-bit encryption, click **Help** on your browser's menu bar, and then select **About**. If your browser does not support 128-bit encryption, please visit the respective company website that provides upgrades to your browser software.

**Internet Security**

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

- Select a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive, must be between six and 20 characters, and can include numbers and special characters.
- Some Web browsers prompt you to save user names and passwords for various sites on the Internet. This feature can be useful, but can put your personal information at risk. If possible, you should disable this option so no one can log in to your account.
- If you use a public or shared computer, it's important that you always sign out completely at the end of each session by clicking the **Logout** option. Logging out shall make it impossible for any other person (using the same system) who is trying to view the contents of your account.
- Wherever possible, delete the Web browser's cache and cookies. The cache maintains a copy of web pages that have been viewed recently.
- Because computers are vulnerable to viruses or online attacks that seek to intercept sensitive information provided through the Internet, your computer should have an up-to-date antivirus program and make use of a firewall.
- You should not leave your system unattended while logged in to NextGen Patient Portal. If you have to leave your system unattended, log out of all programs and close all the open windows that might display sensitive information. NextGen Patient Portal automatically logs you out if there has been no online activity for 20 minutes.

**Caution:** In order 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. For more information on the security of patients’ medical information, refer to the **NextGen Security, Privacy and Confidentiality Summary While Paper**.
Email Notifications

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

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

The enrollment process is a means of signing up to the NextGen Patient Portal account which provides access to your personal and medical information on the NextGen Patient Portal website. Based on the NextGen Patient Portal configuration by the enterprise, you can either register yourself to NextGen Patient Portal or contact the practice for enrollment to NextGen Patient Portal using token.

Enrolling in NextGen Patient Portal

You can enroll yourself and create an account for using NextGen Patient Portal. You must enroll to NextGen Patient Portal using the link provided by the practice. The practice might have also embedded the self-enrolling URL on their website. If that is the case, you must click the link on the practice’s website to access the self-enrollment page. You must check with the practice to obtain access to one of the following links, based on whether you need to enroll to a single practice or multiple practices in an enterprise:

- **Practice-level registration link**: Only one practice is available during enrollment.
- **Enterprise-level registration link**: A list of practices displays during enrollment.

**Note**: This feature is available based on the practice’s configuration for NextGen Patient Portal. If you do not find this feature on the NextGen Patient Portal website, contact the practice for enrollment. For information about enrolling with a token, refer to Enrolling in NextGen Patient Portal with Token (on page 20).
To register in NextGen Patient Portal:

1. Enter the registration or enrollment link (provided by the enterprise or practice) in the Internet browser.
   The Terms and Conditions page displays.

2. Read the terms and conditions and click the Continue button.
   The Your Practice & Information page displays.
If you have a NextGen Patient Portal account, provide the user name and password under the I have a Patient Portal section and click Login.

3 If you do not have an account, select the practice from the Practice list.

Note: Multiple practices display in the list only if you enter an enterprise-level registration link.

4 Enter the following mandatory details in the respective fields:
   - First Name
   - Last Name
   - Address
   - City
   - ZIP/Code
   - Country
   - State
   - Phone number and Phone Extension
   - Date of Birth (in mm/dd/yyyy format)
   - Email Address and Confirm Email Address

Note: The Middle Name, Address2, and Address3 fields are optional.
5 Click the Next button.
The Insurance Information page displays. The insurance information is optional.

6 It is preferred that you select or enter the following details:
Select the I am self-insured check box.
Or
Enter the following insurance or payer details:
   - Insurance/Payer name
   - Policy number
   - Group number
   - Group name
   - Address
   - City
   - State
   - ZIP/Code
   - Country
   - Phone number

Note: Insurance details are optional.

7 Click the Next button.
The Enrollment Credentials page displays.

8 Complete the following details in the Create Username and Password section:
   > Username
   > Password
   > Retype Password

All fields are required. The username and password are case sensitive and must be between six and twenty characters. Passwords must contain at least one number. Use mixed-case letters, numbers and special characters to increase the password strength.

9 Complete the following details in the Create Security Question section:
   > Select a Question
   > Answer
   > Retype Answer

The question and answer are part of your login procedure to access NextGen Patient Portal.

10 Complete the following details in the Create Password Recovery Credentials section:
   > Create a Question
   > Enter your answer
   > Retype Answer
The question and answer are required to reset your password from your NextGen Patient Portal account.

11 Enter the set of words displayed in the image.

Note: If you are unable to read or not legible, click the refresh button for a different phrase or click the audio button to hear the set of words. For additional information, click the help button.

12 Either:

Click the Complete Enrollment button. The confirmation message displays.

Or

Click the Schedule an Appointment button. For additional information on scheduling appointment, refer to the Schedule an Appointment during Enrollment (see "Scheduling an Appointment during Enrollment" on page 19) section.
Scheduling an Appointment during Enrollment

After you provide your details, insurance or payer details, and enrollment credentials (see "Enrolling in NextGen Patient Portal" on page 13), you can schedule an appointment.

Note: This feature is available based on the practice’s configuration. If you do not find this feature when enrolling, you can schedule an appointment after completing enrollment. (See "Request Appointment" on page 49)

To schedule an appointment while registration:

1. Click the Schedule an Appointment button in the Enrollment Credentials page. The Appointment Request page displays.

2. Complete the following details by selecting an option from the corresponding list:
   - Select provider/group
   - Select category
   - Select location

3. Enter the reason for visit in the Reason for appointment field.

4. Select the desired option in the Priority list.

5. Complete the following details by selecting an option from the corresponding list:
   - Preferred date/time
   - Alternate date/time

6. Click the Submit button.
Enrolling in NextGen Patient Portal with Token

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

The practice will also provide you an eight-digit token number to access your NextGen Patient Portal account. The token number is valid for 30 days. If you do not enroll in NextGen Patient Portal within this period, contact your practice to obtain a new token number.

**Note:** If you already have a NextGen Patient Portal account in a practice and want to enroll in another practice in the same enterprise, refer to the procedure to enroll in multiple practices (see "Enrolling to Practices in the same Enterprise" on page 94). If you already have a NextGen Patient Portal account for a practice and try to access NextGen Patient Portal website with the reset password link provided by the practice, you will be redirected to the *Password Reset* page (see "Resetting your Password" on page 26).

**To enroll in NextGen Patient Portal:**

1. Open the welcome email sent from the practice, and click the **Click here to go to NextGen Patient Portal** link.

   The link opens in the default browser and displays the terms and conditions for using NextGen Patient Portal.

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

   **Note:** If you click **I Do Not Accept**, the *NextGen Patient Portal Login* page displays.
The *Submit your enrollment validation* page displays.

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

The *Create enrollment credential* page displays.

4 In the *Create your username and password* section, enter the NextGen Patient Portal user name and password, and then re-enter your password in the fields provided.

All fields are required. The username and password are case sensitive, and must be between six and twenty characters. Passwords must contain at least one number. Use mixed-case letters, numbers and special characters to increase the password strength.

5 In the *Create your login security authorization* section, select a security **question** and then enter and retype your **answer** in the fields provided. The question and answer are part of your login procedure to access NextGen Patient Portal.
6 In the **Create your password recovery credentials** section, enter a question and answer that you will use to reset your password and then retype your answer in the fields provided.

![Create your password recovery credentials](image)

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

Your **NextGen Patient Portal Account** page displays.

![NextGen Patient Portal](image)

**Tip**: For easier access next time, add the NextGen Patient Portal website to your Favorites list.
After you have successfully enrolled in NextGen Patient Portal, you can access your NextGen Patient Portal account.

**Multi-Language Support**

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

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

**Logging On to your NextGen Patient Portal Account**

To log on to your NextGen Patient Portal account:

1. Access the NextGen Patient Portal website. The *Login* page displays.
Note: Based on your practice, the Login page might be customized to appear with a different theme. Click Enroll Now to create a new account if you do not have one. For more information about enrolling, see "Enrolling in NextGen Patient Portal with Token" on page 20.

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

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

The Answer Your Security Question page displays.

3 Enter the requested security information, and then click Submit.
   › If you are enrolled to multiple practices in the same enterprise, the Add new practices page displays (see "Enrolling to Practices in the same Enterprise" on page 94).
   › If a practice in which you are currently enrolled decides to provide you an option to receive only electronic statements, the Go Paperless! page displays.
      
      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
      John Doe       | [ ]
      NextGen Medical Practice - Test | [x]

      To receive only electronic statements, click Go Paperless. Otherwise click Decide Later. You can enable this option later (see "Managing Statement Notifications" on page 99).

Your NextGen Patient Portal account displays. The page displays the menu to access the features and a dashboard with the following information:

 › The latest emails in the Inbox
 › The upcoming appointments
 › A list of appointment reminders
 › The recent lab results
 › The recent medications
 › The practice details

Your account name displays in the top left.
Locked Accounts

You cannot access your NextGen Patient Portal account:

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

- If the practice locks your account, you will receive an email stating that you need to contact the practice to unlock your account. When the practice unlocks the account, you will receive another email stating that the account has been unlocked. You cannot access any of the mails or tasks (except for Research Center) if you log on to your NextGen Patient Portal account when your account is locked.

Changing the User

The user list on the top-right section displays the name of the logged in user. The user list also displays a list of the persons or dependents whose accounts you manage. You can select the name of the person or dependent from the users list to view their records.
Logging Out of your NextGen Patient Portal Account

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

If NextGen Patient Portal does not detect any activity for more than 20 minutes, the system automatically logs you out. A message displays before the system automatically logs out. You must click Continue to extend the session.

**Recommendation:** NextGen Healthcare recommends that you log out before exiting the NextGen Patient Portal website. Properly logging out of the website provides better security for you, as well as your medical records.

User Name and Password Recovery

You can reset your password using:

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

Resetting your Password

To reset your password using your user name:

1. Access the NextGen Patient Portal website.
   The *Login* page displays.
2. Click the **Need help with your user name and password?** link.
   The *Forgot your Login information?* page displays.
3 If you know your user name and answer to the security question, select the I have my user name option.

4 Enter your User Name, and click Next.

   The Reset your credentials page displays.

5 Enter your answer to the forgot password question, and click Submit.

   A message displays notifying you that an email has been sent with a link to reset your password
   (see "Creating a New Password" on page 29).
Recovering your User Name

To reset your password with your demographic information:

1. Access the NextGen Patient Portal website.
   The Login page displays.

2. Click the Need help with your user name and password? link.
   The Forgot your Login information? page displays.

3. Enter the following information:
   › First Name
   › Last Name
   › Email address
   › Date of Birth
   › Zip

   **Note:** You can recover the user name and password only if the information you enter matches the information in the NextGen Patient Portal records. All fields are mandatory.

4. Click Next.
   A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 29).
Resetting Password with Reset Token

To reset your password using a reset token:

1. Access the NextGen Patient Portal website. The Login page displays.
2. Click the Need help with your user name and password? link. The Forgot your Login information? page displays.

   ![Forgot your Login information?](image)

   1. I leave my user name
   2. I'm having problems signing in
   3. I have my reset token

3. Enter the Reset token obtained from the practice.
4. Enter your Email address.
5. Click Next.

   A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 29).
Creating a New Password

To create a new password:

1. In your email application, open the Password Reset email and click the Forgot Password link. The Reset login credentials page opens and displays your user name.

2. In the Reset your password section, enter then retype your new password in the fields provided. All fields are required. Passwords are case sensitive and must be between six and 20 characters. Use mixed-case letters, numbers, and special characters to increase the password strength.

3. Scroll to the Reset your login security authorization section.

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

5. Scroll to the Reset your password recovery credentials section.

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

7. Click Submit.

A message displays indicating that your password has been reset.
8 Click **OK** to continue. The **Login** page displays.

![Login page](image)

9 Log in using your user name and the new password.
The Home page is the default page that displays when you successfully log on to the NextGen Patient Portal website. The Home page displays a menu to access the features and a dashboard with the following sections.

**Inbox**
The *Inbox* section displays a list of the latest messages, documents, and statements that you received from your practice(s).

- Click *Inbox* to view all messages from your practice(s).
- Click the message, document, or statement to view, reply, download, or process them.
- Click *Compose an Email* to compose and send an email to your practice.

**Upcoming Appointments**
The *Upcoming Appointments* section displays any future appointments booked with your practice(s).

- Click *Upcoming Appointments* to view all appointments.
- Click the appointments to view the details, reschedule, or cancel them.
- Click *Schedule an Appointment* to schedule an appointment with your practice.

**Reminders**
The *Reminders* section displays the appointment reminders sent by your practice(s).

- Click the reminders to view the details.
- Click *Schedule* to schedule an appointment.

**Lab Results**
The *Lab Results* section displays the recent lab order results. Click *View Results* to view the lab result details in the chart.

**Medications**
The *Medications* section displays the recent medications prescribed by your practice(s). Click *Refill* to send a refill request for a medication.

**Practice Information**
The last section displays the practice information and the welcome message. Click *View Profile Page* to view the complete details.
C H A P T E R  5

Mail

This chapter explains how to use the Mail page which provides access to the Inbox, Sent Items, and Compose Message pages.

Inbox

The Inbox displays all incoming items from all practices in which you are enrolled including those of the guardians.

Accessing the Inbox

The Inbox displays incoming messages, documents, templates, PHRs, and interactive forms from your practices.

To access Inbox items:

1. Select Inbox from the Mail menu.

   Note: You can also access the Inbox from the dashboard on the Home page.

   All items from all your practices and any people you are managing display. New or unread items appear in bold text. The number of items in your Inbox display at the bottom left of the page. The number of pages display at the bottom right of the page.

2. You can perform the following actions in the Inbox:
Select from the Practice, To, and Type list to filter the items that display in the Inbox.

Click the column headings to sort the items in ascending or descending order.

Select the page number from the drop-down to navigate to other pages.

Click an item in to open it.

### Viewing and Replying to Messages

NextGen Patient Portal enables you to view messages, such as appointment reminders, referrals, and so on from your practice and to send a response.

**To reply to a message:**

1. Access your Inbox (see "Accessing the Inbox" on page 35).
2. Select Messages from the Type list.

   A list of messages display.

   Unread messages appear in bold text.

3. Click a message to open.

   **Note:** You can also open a message by clicking the message in the Inbox section in the Home page.

   The message opens in a new window.

   The Reply link does not display if the provider has marked the message as do-not-reply.
4. To view any attachments (requires Adobe Acrobat Reader), click the appropriate link in the Attachments section.

The attachment opens in a new window.

5. To enter a response, click Reply.

The message displays space above the original contents to enter your reply.

6. Type in your reply and click Send.

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

7. Close the window to return to your account.
**Viewing Documents**

In order to view documents sent from your practice, you will need Adobe Acrobat Reader. If you do not have it, you can download it from the Adobe website (http://get.adobe.com/reader/).

**To view a document:**

1. Access your **Inbox** (see "Accessing the Inbox" on page 35).
2. Select **Documents** from the **Types** list.

   A list of document display.

   ![Document List](image)

   Unread documents appear in bold text.

3. Click a document to open.

   **Note:** You can also open a document by clicking the message in the **Inbox** section in the **Home** page.

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

4 You can click the here link on the page to download the document.
   The comments entered by the practice display under Document Comments.

**Viewing PHRs**

You can view the PHRs sent by the practice(s). The PHR contains your chart details.

To view PHR:
1 Access your Inbox (see "Accessing the Inbox" on page 35).
2 Select Personal Health Record from the Type list.
PHRs available in the Inbox display.

![Image of Inbox with PHRs]

Unread records appear in bold text.

3 Click a record to open.

**Note:** You can also click the message in the Inbox section in the **Home** page or click the **Download and send my chart** link in the chart (see "Viewing the Chart" on page 61) to open a PHR.

4 Select a date on the left to view the PHR.
The details of the PHR for the selected date display.

5 You can view the PHR details and perform the following tasks:
   - Click the **Download My Data** button to download and save the chart.
   - Click the **Who has viewed my chart** link to see who has viewed your chart.
   - Click the **Send** link to send the chart to another provider.
   - Click the **Go back to my chart** link to view the chart.
Submitting a Template

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

To submit a template:
1. Access your Inbox (see "Accessing the Inbox" on page 35).
2. Select Templates from the Type list.

Unread templates appear in bold text.

3. Click a template to open.

**Note:** You can also open a template by clicking the message in the Inbox section in the Home page.

The template opens in a new window.

The first page of the form includes instructions for completing it.

4. Read the instructions and click the Next button.
5 Fill out the template as instructed.
6 To print out the displayed page of the template, click the Print button.
7 To proceed to the next page, click the Next button. To go back to the previous page, click the Previous button.
8 After you have completed the template, click the Submit Completed Forms button.
   A message indicating that your information has been submitted to your practice for review displays.
9 Click the Close button to return to the list of templates.
   Your copy of the submitted form moves to Sent Items.

**Submitting an Interactive Medical Form**

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

**To submit an interactive medical form:**

1 Access your Inbox (see "Accessing the Inbox" on page 35).
2 Select Interactive Medical Forms from the Type list.
A list of interactive medical forms displays.

The Unread form items appear with bold type in the list of interactive medical forms.

3 Click a form to open.

Note: You can also open an Interactive Medical Form by clicking the message in the Inbox section in the Home page.

The form opens in a new window.

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

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

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

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

When you reach the end of the form, as summary displays.
8 Review your answers and either:
   ▶ Click **Start Over** to go back and start from the first question.
   
   **Note:** A confirmation message to go back to the first question displays. Click **OK** to start over.
   ▶ Click **Print** to print out your answers.
   ▶ Click **Back to Inbox** to go back to Inbox page.

9 Once you have completed your form, click the **Submit** button to send the form to the practice. A message indicating that your information has been submitted to your practice for review displays.

10 Click **Back to Inbox** to return to the mail box page.
   Your copy of the submitted form moves to **Sent Items**.

---

**Deleting Inbox Items**

You can delete one or more messages from the Inbox.

**To delete one or more items from the Inbox:**

1 Access your **Inbox** (see "Accessing the Inbox" on page 35).
2 Select the check box next to the item(s) you want to delete or select the check box next to the **Delete** button to remove all items.
3 Click **Delete**.
   
   **Note:** You can also delete a message or an appointment by opening and clicking **Remove**.
   A confirmation message displays.
4 Click **OK** to delete the item.

---

**Printing Inbox Items**

You can print all the Inbox items except PHRs and documents. PHRs and documents can be downloaded in PDF format and printed.

**To print a message:**

1 From the **Inbox** tab, open the message.
   The message details display.
2 Click **Print**.
A new window containing the message details displays followed by the Print dialog box.

![Print dialog box](image)

3. Select the printer and click Print.
   The message is printed through the selected printer.

**Sent Items**

The Sent Items page displays all messages and items you sent to all practices.

**Accessing Sent Items**

You can access the sent items from the Mail menu.

To access sent items:

1. Select Sent Items from the Mail menu.
   By default, all sent items for all your practices and the people you manage display. The total number of items appears on the bottom left of the page.

   ![Sent Items list](image)

2. You can perform the following actions in the Sent Items page:
   - Select from the Practice, To, and Type list to filter the items that display in the Inbox.
   - Click the column headings to sort the items in ascending or descending order.
   - Select the page number from the drop-down to navigate to other pages.
   - Click an item in to open it.
Deleting Sent Items

You delete one or multiple messages from the Inbox.

To delete one or more sent item:
3 Select Sent Items from the Mail menu.
4 Select the check box next to the item(s) you want to delete or select the check box next to the Delete button to remove all items.
5 Click Delete.
   A confirmation message displays.
6 Click OK to delete the item.

Composing Messages

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

To compose a message:
1 Select Compose Message from the Mail menu.

   Note: You can also click the Compose an Email link in the Inbox section in the Home page.

   The Compose Message form displays.

   1) Select Practice and Patient

   *Practice: NextGen Healthcare Medical Practice
   *Send on behalf of: Self

2 Select the Practice to which you want to send the message.
3 Select the type of message you are sending from the **Category** list.

![Image of message category and recipient selection]

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

4 Select the recipient of the message from the **To** list.

5 Type the subject of the message in the **Subject** field.

6 Type your message in the **Message** field.

7 Click **Submit**.

An alert indicating that your message has been successfully sent displays.
This page is intentionally left blank.
CHAPTER 6

Schedule

This chapter provides information to schedule and view appointments.

Request Appointment

There are three types of appointments depending on how your practice’s settings:

- **Non-Integrated** - you can submit an appointment request by selecting a preferred and optionally an alternate date and time
- **Integrated** - you can submit an appointment request by selecting a preferred date and time
- **Real Time** - you can search for an available appointment schedule by selecting a preferred date and time and book an appointment

Creating an Appointment Request

Use the following procedure to create an appointment request. A red asterisk next to a field name indicates a required entry.

To create an appointment request:

1. Select **Request Appointment** from the **Schedule** menu.

   **Note:** You can also click the **Schedule an Appointment** link in the **Upcoming Events** section in the **Home** page.

   The **Appointment Request** form displays.

2. Select the **Practice** with which you want to schedule an appointment.

3. Select a name from the **Patient** list on whose behalf you want to schedule an appointment.
Select the following details in the **Select Provider and Location** section.

- Select the provider or group for your appointment.
- Select the category or type of appointment you want to schedule.
- Select the office or facility location where you want to schedule the appointment.
  
  The hours of operations display when you select a location.

**Note:** Categories are specific to the practice and vary based on the practice settings.

- To view the address of the selected location, click the **Address** link.
- If required, click the **Map** icon to view the location on a map. The map opens in a new window.

Depending on how your practice process appointments, submit (see "Submitting an Appointment Request" on page 51) the request and wait for a response from the practice or book (see "Booking an Appointment" on page 52) your own appointment.
Submitting a Non-Integrated Appointment Request

A non-integrated appointment is a category of appointments that allows you to send an appointment request to your provider. The provider will schedule an appointment based on your preferred date and time or suggest an alternate schedule. Submitting an appointment request does not guarantee an actual appointment with your physician. It must be confirmed by the medical practice before it is considered a booked appointment. Allow at least 24 hours to receive a response.

To submit an appointment request:

1. Create an Appointment Request. (see "Creating an Appointment Request" on page 49)
2. Select the category for non-integrated appointments.
   - Note: The non-integrated appointment category is available only if your practice has set up non-integrated appointments.
3. Scroll to the Submit Request section.
4. Enter or select the following information:
   - Reason for appointment: Enter the reason for the appointment.
   - Priority: Select the level of urgency (Low, Normal or High).
   - Make appointment for: Select the time frame for your appointment, such as next week or next month.
   - 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.
   - 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.
   - Note: The Alternate date/time is available only when the appointment type is non-integrated.
5. Click Submit.
   - A message indicating that your appointment request has been successfully submitted displays.
6. 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.
7 Open the request response to see if the appointment was booked or is pending (see "Accepting a Pending Appointment Request" on page 59).

8 If the suggested time is not suitable, you need to either cancel (see "Cancelling a Booked Appointment" on page 58) or reschedule (see "Rescheduling a Booked Appointment" on page 55) the appointment and then create a new request.

**Submitting an Integrated Appointment Request**

An integrated appointment is a category of appointments that allows you to send an appointment request to your provider. The integrated appointment category integrates with the practice’s appointment scheduler and allows the provider to schedule an appointment directly from your request. The provider schedules an appointment based on your preferred date and time or suggest an alternate schedule. Submitting an appointment request does not guarantee an actual appointment with your physician. It must be confirmed by the medical practice before it is considered a booked appointment. Allow at least 24 hours to receive a response.

**To submit an appointment request:**

1 Create an Appointment Request. (see "Creating an Appointment Request" on page 49)

2 Select the category for integrated appointments.

**Note:** The integrated appointment category is available only if your practice has set up integrated appointments.

3 Scroll to the **Submit Request** section.

4 Enter or select the following information:
   - **Reason for appointment:** Enter the reason for the appointment.
   - **Priority:** Select the level of urgency (Low, Normal or High).
   - **Make appointment for:** Select the time frame for your appointment, such as next week or next month.
   - **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.

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

6 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.

7 Open the request response to see if the appointment was booked or is pending (see "Accepting a Pending Appointment Request" on page 59).

8 If the suggested time is not suitable, you need to either cancel (see "Cancelling a Booked Appointment" on page 58) or reschedule (see "Rescheduling a Booked Appointment" on page 55) the appointment and then create a new request.

**Booking an Appointment**

Based on your practice’s settings you can book an appointment in real-time. The real-time appointment category allows you to select and book an appointment for an available timeslot. Use the following procedure to book an appointment.

To book an appointment:

1 Create an Appointment Request. (see "Creating an Appointment Request" on page 49)

2 Select the category for integrated appointments.

   **Note:** The real-time appointment category is available only if your practice has enabled and set up real-time appointments.

3 Scroll to the **Search Appointment** section.

```
4 Enter or select the following information:
   - **Reason for appointment:** Enter the reason for the appointment.
   - **Priority:** Select the level of urgency (Low, Normal or High).
   - **Make appointment for:** Select the time frame for your appointment, such as this week, next week, or next month.
   - **Preferred date/time:** Select the preferred date and time, and then select the corresponding check box for the day when you would like to schedule the appointment.

5 Click **Search**.
```
Chapter 6  Schedule

NextGen Patient Portal displays the first five available appointments.

6 Select an appointment from the list. If the appointments listed are not suitable, click the Load more link. Click the Back to first available link to view the first five appointments.

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.

7 Once you have selected an appointment, click Book Appointment.
The details of the appointment display.

8 If required, you can click the corresponding links to **Make another appointment** or **Print for your records**.

**Accepting a Pending Appointment Request**

When you send a non-integrated appointment request, the practice can book the appointment or reply with an available schedule. A pending appointment request displays in your Inbox when the practice replies to a non-integrated 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.

**To accept a pending appointment request:**

1 Open the pending appointment from the **Inbox**.

   The **Appointment Request** details display.

   ![Appointment Request Details](image)

   **This appointment request is awaiting your response**

   Click **here** to view your appointment.

   **Date practice responded:** Tue 6/3/2014 11:34:52 AM GMT
   **Proposed appointment date:** Thursday, June 05, 2014 at 08:30 AM
   **Proposed provider:** Smith, John
   **Proposed location:** Nextgen Medical Practice
   **Message from practice:**
   Your appointment schedule

   **Original Appointment Request**
   **Patient Name:** Doe, John
   **Date sent to practice:** Tue 6/3/2014 11:33:09 AM GMT
   **Requested provider:** Smith, John
   **Requested category:** Appointment Request
   **Requested location:** Nextgen Medical Practice
   **Appointment priority:** Normal
   **1st preferred:** Mon, Tues, Wed, Thurs, Fri, Sat or Sun from 10:00 AM to 1:00 PM
   **2nd preferred:** Mon, Tues, Wed, Thurs, Fri from 1:00 PM to 2:00 PM
   **Reason for appointment:** Flu Shot

2 Click **Accept** to accept the appointment.

   A message that your appointment response has been successfully submitted displays.
**Replying to a Pending Appointment Request**

You can send a reply to change the appointment from a pending appointment request message.

**To send a reply from a pending appointment request:**

1. Open the pending appointment from the **Inbox**.
   
   The *Appointment Request* details display.

   ![Appointment Request Details](image1)

2. Click **Reply**.
   
   The *Reason for new appointment* box displays.

3. Enter the reason to change the appointment.

4. Click **Send**.
   
   A message that your appointment response has been successfully submitted displays.

   ![Reason for new appointment](image2)
Cancelling an Appointment Request

You can cancel a pending appointment request.

**To cancel a pending appointment request:**

1. Open the pending appointment from the **Inbox**.
   
   The *Appointment Request* details display.

2. Click **Recall Appt. Request**.
   
   A confirmation message displays.

3. Click **OK**.
   
   The pending appointment request is canceled.

Rescheduling an Appointment

You can reschedule a booked appointment before the appointment date.

**To reschedule a booked appointment:**

1. Click the **My Appointments** link and open a booked appointment.
Chapter 6  Schedule

The Appointment Detail form displays.

Click Reschedule This Appointment.

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

A list of reasons to reschedule displays.

Select a Reason and click Submit.

The My Appointment page opens. The selected appointment's status is now set to Cancelled.

You can now start a new appointment request (see "Creating an Appointment Request" on page 49).

Cancelling an Appointment

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

To cancel an appointment:

1 From either the Inbox or the My Appointments link, open a booked appointment.
The Appointment Detail form displays.

2 Click Cancel This Appointment.

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

A list of reasons to cancel displays.

3 Select a Reason and click Submit.

The My Appointment page opens. The selected appointment's status is now set to Cancelled.

Deleting a Pending Appointment Request

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

To remove a pending appointment request:

1 Open the pending appointment from the Inbox.
The Appointment Request details display.

The appointment request is awaiting your response

Click here to view your appointment.

Date practice responded: Tue 6/3/2014 11:34:52 AM GMT
Proposed appointment date: Thursday, June 06, 2014 at 10:30 AM
Proposed provider: Smith, John
Proposed location: Nextgen Medical Practice
Justplace
Anytown, MI 88777
(770) 555-0110

Message from practice:
Your appointment schedule.

The appointment is scheduled.

Original Appointment Request

Patient Name: John Doe
Date sent to practice: Tue 6/3/2014 11:33:09 AM GMT
Requested provider: Smith, John
Requested category: Appointment Request
Requested location: Nextgen Medical Practice
Appointment priority: Normal
1st preferred: Mon, Tue, Wed, Thu, Fri, Sat or Sun from 10:00 AM to 1:00 PM
2nd preferred: Mon, Wed, Thu or Fri from 1:00 PM to 2:00 PM
Reason for appointment: Flu Shot

2 Click Remove.
A confirmation message displays.

3 Click OK.
The pending appointment request is removed from the account.

My Appointments

The My Appointments page displays a list of all the booked and cancelled appointments. You access the My Appointments page from the Mail menu or by clicking Upcoming Appointments from the dashboard on the Home page. You can open and print (see "Printing Inbox Items" on page 44), cancel (see "Cancelling a Booked Appointment" on page 58), reschedule (see "Rescheduling a Booked Appointment" on page 55), or delete (see "Deleting Inbox Items" on page 44) appointments.
My Chart

The chart on NextGen Patient Portal provides you the chart information available at your practice.

Viewing the Chart

You can view the chart from the My Chart menu.

To view the chart:

1. In the My Chart menu, click View My Chart.

   **Note:** You can also click the Go back to my chart link when viewing a PHR (see "Viewing PHRs" on page 39) to open the chart.

   The chart displays the details of the latest visits and the chart information. A list of items available in the chart display on the left.

   2. Click a chart item on the left to view the details.
The following table provides the details of the chart items.

<table>
<thead>
<tr>
<th>Chart Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits</td>
<td>Displays details including the provider name, encounter type, and medications from the latest visits.</td>
</tr>
<tr>
<td>Allergies</td>
<td>Displays the details including substance, reaction, severity, and status of the known allergies recorded at the practice.</td>
</tr>
<tr>
<td>Medications</td>
<td>Displays the details including the medication name, sig instructions, dosage, effective date, and status of the medication prescribed at the practice.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Displays the details including the name, added date, last related visit date, and status of the health condition.</td>
</tr>
<tr>
<td>Labs</td>
<td>Displays the details including the test name, ordered practice name, ordered date, and lab results. Click the Details link or the row to view the lab result details.</td>
</tr>
<tr>
<td>Vitals</td>
<td>Displays the details including the date, vital signs, and measure results of all vitals recorded at the practice.</td>
</tr>
<tr>
<td>Immunizations</td>
<td>Displays the details including the name, date, comments, and status of the immunization ordered at the practice.</td>
</tr>
<tr>
<td>Procedures</td>
<td>Displays the details including the date and name of the procedure performed at the practice.</td>
</tr>
<tr>
<td>Insurance</td>
<td>Displays the details including the name, insurance type, covered party Id, and payer group Id of your health insurance.</td>
</tr>
<tr>
<td>Social History</td>
<td>Displays the details including the type, recorded date, description, and quantity of any social habits.</td>
</tr>
<tr>
<td>Family History</td>
<td>Displays the details including the family member, diagnosis, age at onset, and status of family’s medical history.</td>
</tr>
<tr>
<td>Advanced Directives</td>
<td>Displays the details of the advance healthcare directives recorded at the practice.</td>
</tr>
<tr>
<td>Instructions</td>
<td>Displays the details of the instructions entered by the providers at the practice.</td>
</tr>
<tr>
<td>Referral Reason</td>
<td>Displays the details of the referral if you are referred to another practice or provider.</td>
</tr>
<tr>
<td>Plan Of Care</td>
<td>Displays the details including the date, type, action, and status of the plan of care recorded at the practice.</td>
</tr>
<tr>
<td>Demographic Info</td>
<td>Displays the details including your name, date of birth (DOB), gender, ethnicity, and preferred language entered at the practice.</td>
</tr>
<tr>
<td>Functional Status</td>
<td>Displays the details of the functional status recorded at the practice.</td>
</tr>
</tbody>
</table>

3 Click the Download and send my chart link to view the details in the PDF format.

**Downloading and Saving PHRs**

A PHR is a document that contains all the information from your chart. You can download and save the PHRs as a PDF file. You need the Adobe Acrobat Reader to view the PDF file.
To save the PHRs as a PDF file:
1. Open the chart (see "Viewing the Chart" on page 61).
2. Click the **Download and send my chart** link to view the details in the PDF format.
   
   **Note:** You can also open the PHR from the **Inbox** (see "Viewing PHRs" on page 39).

   The PHR details display.

3. Click the **Download My Data** button.
   The **File Download** dialog box displays.
4. Click **Save** to save the file.
   
   **Note:** you can also click **Open** to view the record and then save.

---

**Viewing Audit History**

The audit history enables you to see who has accessed your chart.

**To view the audit history:**

1. Open the chart (see "Viewing the Chart" on page 61).
2. Click the **Who has viewed my chart** link.
   
   **Note:** You can also open the PHR from the **Inbox** (see "Viewing PHRs" on page 39), and then click the **Who has viewed my chart** link.

   The audit history displays with the user name, event description, and event date.

---

**Sending the PHR**

You can send your PHR to another provider.

**To send PHR:**

1. Open the chart (see "Viewing the Chart" on page 61).
2 Click the **Download and send my chart** link to view the details in the PDF format.

**Note:** You can also open the PHR from the **Inbox** (see "Viewing PHRs" on page 39).

The PHR details display.

3 Click the **Send** link.

   The **Send Chart** page displays.

4 If you know the provider’s email address, enter the same in the **Provider’s direct address** text box, and click **Send My Chart**.

5 If you do not know the provider’s email address, enter any of the provider’s details in the **I don't have the provider's direct address** section, and click **Search**.

   A list of matching provider names display if they are found in the system.

6 Select the provider and send the PHR.

---

### Requesting PHRs

The following procedure describes how to 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.

**To request a PHR:**

1 From the **My Chart** menu, select **Request Health Record**.

   The **Request Personal Health Record** form displays.

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

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

4 Click **Submit**.

   A message that your request has been successfully submitted displays. When the health record is sent to you, it shows up as a new item in your Inbox.
Statements are sent from the practice to your NextGen Patient Portal account if you have opted to receive electronic statements. You can view and pay your statements online.

**Viewing Statements**

**To view statements:**

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

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

   The latest statement details display.
To view a statement for a particular date, click the corresponding click to view this statement link.

To print the statement, click Print.

To return to the statement list, click Close.

If your practice accepts electronic payments, click Make a Payment (see "Making Payments" on page 66).

**Making Payments**

You can pay the statements you receive from your practice online through NextGen Patient Portal.

*Note:* Some practices may not accept online payments. Contact your practice to check if they accept online payments.

To make payments:

1. From the Inbox tab, Sent Items tab or the navigation pane, click the Pay Statements link.
   
   Your latest statement summaries display.
2 Click **Make a Payment**.

The **Make a Payment form** displays.

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

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

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

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

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

For **eCHECK Payments**, enter or select the following information:

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

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

6 Select either **Pay Total Due** or **Pay Other Amount**

When choosing **Pay Other Amount**, enter the payment amount.

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

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.

![Payment Submitted](image)

**Note**: It may take 24 to 48 hours for this transaction to be posted and appear on your statement.

To print your payment receipt, click the **Print this receipt** link.
This page is intentionally left blank.
Renew Medications

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

Renewing Medications

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

To renew your medication(s):
1. In the Medications menu, select Renew Medication.
   - **Note:** You can click the Refill link for the medication in the Medications section in the Home page.
2. Select your medical practice (see "Selecting your Medical Practice" on page 71).
3. Select your medication(s) (see "Renewing Medications" on page 64).
4. Select your pharmacy (see "Selecting your Pharmacy" on page 73).
5. Submit your renewal request (see "Submitting your Request" on page 76).

Selecting your Medical Practice

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

To select your medical practice:
1. From the Inbox tab, Sent Items tab or the navigation pane, click the Renew Medications link.
   - The Renew Medications form displays.
2. Scroll to the Select Your Medical Practice section.
   - **Note:** A red asterisk next to a field name indicates a required entry
3. If you are enrolled in multiple practices, select the Practice you want to renew your medication from the corresponding list.
4. If you are managing other people's accounts, select the Patient on whose behalf you are making the request.
5. You can now select your medication(s) (see "Selecting your Medication" on page 72).
Selecting your Medication

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

To select your medication:

1. After selecting your practice (see "Selecting your Medical Practice" on page 71), scroll to the Select Medications section.

   A list of medications available for renewal display.

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

   A list of alternative medications display.
3 Select the **Display any inactive medications that may be available for renewal** check box to view inactive medications.

### Select Medications

Select the medication you wish to renew.

**Selected Medication(s):**

- **PAIN RELIEVER (ACETAMINOPHEN) 0 * 500MG CAPSULE 6/2/2014 - No End Date**

- **DOLAPHINE HCL METHADONE HCL**
  - Dose: 10MG
  - Description: take 1 tablet by oral route every 8 hours
  - Start Date: 6/2/2014
  - Stop Date: 6/4/2014

- **IBU-PROFEN COLD & SINUS**
  - Description: take 1 tablet by oral route every 4 - 6 hours as needed; do not exceed 6 tablets in 24hrs
  - Start Date: 6/2/2014
  - Stop Date: 6/4/2014

- **PAIN RELIEVER ACETAMINOPHEN**
  - Dose: 500MG
  - Description: take 2 capsule by oral route every 6 hours as needed
  - Start Date: 6/2/2014

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

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

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

5 Click **Select**.

6 If you select inactive medications, a new check box **Yes, I would like to request the above inactive medication** displays. Select the check box.

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

You have selected one or more inactive medication(s) for renewal. Please acknowledge this request by checking the 'Yes, I would like to request the above inactive medication(s)'.

7 To make any changes, repeat Steps 1 to 5.

8 You can now select your pharmacy (see "Selecting your Pharmacy" on page 73).

### Selecting your Pharmacy

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

**To select a pharmacy:**

1 After selecting your medication, scroll to the **Select Pharmacy** section.
Chapter 9  Renew Medications

Your preferred pharmacy displays.

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

A search form displays.

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

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

The top 100 pharmacies that meet the search criteria display.

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

5 Click the pharmacy's name to select it.

6 Select the Set as your NextGen Patient Portal preferred pharmacy check box to set the default pharmacy.

7 Click Select.

8 You can now submit your renewal request (see "Submitting your Request" on page 76).
Adding a New Pharmacy

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

To add a new pharmacy:

1. In the Select Pharmacy section, click the Select different pharmacy link.
   A search form displays.

2. Click Add New.
   The Add New Pharmacy form displays.

3. Enter the pharmacy details and click Save.

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

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

   To change the pharmacy information, click the pharmacy’s name and modify the details.
Submitting your Request

After selecting the practice, medication and pharmacy you must submit the renewal request.

To submit the renewal request:

1. In the Submit Renewal section:
   - Select the Reason for renewal.
   - Select the Person to whom you are sending the medication renewal
   - Enter the reason for the prescription renewal in the Comments field.

2. Click Submit to complete the process.

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

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

You have selected one or more inactive medication(s) for renewal. Please acknowledge this request by checking the "Yes, I would like to request the above inactive medication(s)."
Chapter 10

Research

The Research gives you access to the Healthwise® Health Information Knowledgebase, which is an online health encyclopedia.

To access the Healthwise Knowledgebase:

1. In the menu, click **Research**.
   - The Healthwise Knowledgebase Home page displays.

2. From this page you can:
   - **Perform a Search:** The search function enables you to research health topics. If you received a Healthwise Patient Instruction handout at the office, you can enter the code number at the bottom of the page in the Search field to view that topic or other related topics.

   While the Patient Instruction handout covers high level topics and provides clear instructions (such as "What to do after your visit for Heart Disease"), the Knowledgebase provides additional detail about the condition and covers other relevant topics to educate you.
Use Interactive Tools: The interactive tools in the Healthwise Knowledgebase provide you with tailored health information just by answering a few questions about your health. You can assess your risk for a heart attack, learn what contributes to stress, or even calculate the calories you burn during a particular activity. Links to these interactive tools appear throughout relevant topics and in the Health Tools section of topics.

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

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

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

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

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

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

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. How this information was developed (https://www.healthwise.net/nextgen/Content/StdDocument.aspx?DOCHWID=support-abouthw#support-abouthw-editorial) to help you make better health decisions.
Chapter 11

Settings

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

Account Settings

This section describes how to use the functions to change your user name, password, security question, and forgotten password question.

Changing your User Name

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

To change your user name:

1. In the Settings menu, select Account Settings.
   The Account Settings page displays.

   Account Settings

<table>
<thead>
<tr>
<th>User Name</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your User Name</td>
<td>JohnDoe</td>
</tr>
<tr>
<td>Password</td>
<td>Edit</td>
</tr>
<tr>
<td>Your Password</td>
<td>******</td>
</tr>
<tr>
<td>Security Question</td>
<td>Edit</td>
</tr>
<tr>
<td>To identify you as the account owner</td>
<td>What is your favorite color?</td>
</tr>
<tr>
<td>Forgot Password Question</td>
<td>Edit</td>
</tr>
<tr>
<td>To request a password reset</td>
<td>UGM Year?</td>
</tr>
<tr>
<td>Un-enroll from Patient Portal</td>
<td>Edit</td>
</tr>
<tr>
<td>Delete your Patient Portal account</td>
<td>Edit</td>
</tr>
</tbody>
</table>

2. In the User Name section, click the Edit link.
Chapter 11  Settings

The User Name section expands.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>Enter your new user name and then retype it in the fields provided.</td>
</tr>
<tr>
<td>Your User Name</td>
<td>All fields are required. User names are case sensitive and must be between six and 20 characters.</td>
</tr>
<tr>
<td>New user name</td>
<td></td>
</tr>
<tr>
<td>Retype user name</td>
<td></td>
</tr>
<tr>
<td>Current password</td>
<td>Enter your current password in the field provided.</td>
</tr>
<tr>
<td>Submit</td>
<td></td>
</tr>
</tbody>
</table>

3 Enter your **new user name** and then retype it in the fields provided. All fields are required. User names are case sensitive and must be between six and 20 characters.

4 Enter your **current password** in the field provided.

5 Click **Submit**.

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

**Changing your Password**

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

**To change your password:**

1 In the **Settings** menu, select **Account Settings**.

   The **Account Settings** page displays.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td></td>
</tr>
<tr>
<td>Your User Name</td>
<td>JohnDoe</td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Your Password</td>
<td>xxxxxxx</td>
</tr>
<tr>
<td>Security Question</td>
<td></td>
</tr>
<tr>
<td>Forgot Password Question</td>
<td></td>
</tr>
<tr>
<td>Un-enroll from Patient Portal</td>
<td>Delete your Patient Portal account</td>
</tr>
</tbody>
</table>

2 In the **Password** section, click the **Edit** link.
The Password section expands.

3 Enter your new password and then retype it in the fields provided. All fields are required. Passwords are case sensitive, must be between 6 and 20 characters and contain at least one number. As you type your password, a password strength indicator displays. Use mixed-case alphabets, numbers and punctuation characters to increase the password strength.

4 Enter your current password in the field provided.

5 Click Submit.

A message that your password has been updated displays. The next time you log in to the NextGen Patient Portal, use your new password.

**Changing your Security Question**

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

To change your security question:

1 In the Settings menu, select Account Settings.

   The Account Settings page displays.

2 In the Security Question section, click the Edit link.
The Security Question section expands and displays your current security question.

1. Select a new question from the list.
2. Enter and confirm your new answer in the fields provided.

   Note: All fields are required.

3. Enter your current password in the field provided.
4. Click Submit.
   
   A message that your security question has been updated displays.

**Changing your Forgotten Password Question**

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

To change your forgotten password question:

1. In the Settings menu, select Account Settings.
   
   The Account Settings page displays.

2. In the Forgot Password Question section, click the Edit link.
The Forgot Password section expands and displays your current question.

3 Enter and confirm a new question to help you remember your password in the fields provided.
4 Enter and confirm a new answer to your new question in the fields provided.
5 Click Submit.

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

**Un-enrolling from the NextGen Patient Portal**

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

**To un-enroll from the NextGen Patient Portal:**

1 In the Settings menu, select Account Settings.
   The Account Settings page displays.
2 In the Un-enroll from Patient Portal section, click the Delete your Patient Portal account link.
A form to un-enroll from NextGen Patient Portal displays.

3 Select the Reason from the corresponding list.
4 Click Un-enroll.
   A confirmation message displays.

5 Click OK to delete your NextGen Patient Portal account.

My Information

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

Updating your Name and Date of Birth

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

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

To update your name and date of birth:
1 In the Settings menu, select My Information.
Information about your account displays.

2. Next to your user name and birth date, click the **Edit** link. Your name and date of birth fields display.

3. Modify the details as required.
4. If needed, click the **Calendar** icon to select a date.
5. Click **Update**. A message that your information has been updated displays.

### Managing your Addresses

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

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

**To manage your mailing addresses:**
1. In the **Settings** menu, select **My Information**.
   Information about your account displays.
2. Scroll down to the **Addresses** section.
3. To add a new address:
   
   - Click the **Add** link.
A blank address form displays.

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

Click Add.

A message that your address has been added displays.

4 To update an address:

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

Information about the selected address displays.

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

› Click Update.

A message that your address has been updated displays.

5 To delete a mailing address:

› Click the Edit link next to the address you want to change.
Information about the selected address displays.

➢ Click **Delete**.

A confirmation message displays.

➢ Click **OK**.

A message that your address has been deleted displays.

**Managing your E-mail Addresses**

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

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

**To manage your e-mail addresses:**

1. In the **Settings** menu, select **My Information**.
   
The information about your account displays.

2. Scroll to the **E-mail Address** section.

3. To add another e-mail address:

   ➢ Click the **Add** link.
   
   A blank e-mail address form displays.

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Gateway</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-11 Speakout</td>
<td>@cingularme.com</td>
</tr>
<tr>
<td>Alaska Communications Systems</td>
<td>@msg.acsalaska.com</td>
</tr>
<tr>
<td>Alltel Wireless</td>
<td>@message.alltel.com</td>
</tr>
<tr>
<td>American Messaging</td>
<td>@amsmsg.net</td>
</tr>
<tr>
<td>AT&amp;T Enterprise Paging</td>
<td>@page.att.net</td>
</tr>
<tr>
<td>AT&amp;T Mobility</td>
<td>@cingularme.com</td>
</tr>
<tr>
<td>AT&amp;T Wireless</td>
<td>@txt.att.net</td>
</tr>
<tr>
<td>BeepOne</td>
<td>@beepone.net</td>
</tr>
<tr>
<td>Bell Mobility &amp; Solo Mobile</td>
<td>@txt.bell.ca</td>
</tr>
<tr>
<td>Boost Mobile</td>
<td>@myboostmobile.com</td>
</tr>
<tr>
<td>Cellular One</td>
<td>@mobile.celloneusa.com</td>
</tr>
<tr>
<td>Cellular South</td>
<td>@csouth1.com</td>
</tr>
<tr>
<td>Centennial Wireless</td>
<td>@cwemail.com</td>
</tr>
<tr>
<td>Cingular</td>
<td>@cingularme.com</td>
</tr>
<tr>
<td>Cricket</td>
<td>@mms.mycricket.com</td>
</tr>
<tr>
<td>Fido</td>
<td>@fido.ca</td>
</tr>
<tr>
<td>Globalstar</td>
<td>@msg.globalstarusa.com</td>
</tr>
<tr>
<td>Helio</td>
<td>@myhelio.com</td>
</tr>
<tr>
<td>Illinois Valley Cellular</td>
<td>@ivctext.com</td>
</tr>
<tr>
<td>Indiana Paging Network</td>
<td>@ipnpaging.com</td>
</tr>
<tr>
<td>Iridium</td>
<td>@msg.irdium.com</td>
</tr>
<tr>
<td>MetroPCS</td>
<td>@mymetropcs.com</td>
</tr>
<tr>
<td>MTS</td>
<td>@text.mtsmobility.com</td>
</tr>
<tr>
<td>Ntelos</td>
<td>@nteloswireless.com</td>
</tr>
<tr>
<td>Page1</td>
<td>@page1email.com</td>
</tr>
<tr>
<td>President's Choice</td>
<td>@txt.bell.ca</td>
</tr>
<tr>
<td>ProPage Inc.</td>
<td>@page.propage.net</td>
</tr>
<tr>
<td>Qwest</td>
<td>@qwestmp.com</td>
</tr>
<tr>
<td>Rogers</td>
<td>@pcs.rogers.com</td>
</tr>
<tr>
<td>Rogers Paging</td>
<td>@paging.rogers.com</td>
</tr>
<tr>
<td>Name</td>
<td>Gateway</td>
</tr>
<tr>
<td>--------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Sasktel</td>
<td>@sms.sasktel.com</td>
</tr>
<tr>
<td>Shentel</td>
<td>@shentel.net</td>
</tr>
<tr>
<td>Sprint (Nextel)</td>
<td>@page.nextel.com</td>
</tr>
<tr>
<td>Sprint (PCS)</td>
<td>@messaging.sprintpcs.com</td>
</tr>
<tr>
<td>Suncom</td>
<td>@tms.suncom.com</td>
</tr>
<tr>
<td>Telus Mobility</td>
<td>@msg.telus.com</td>
</tr>
<tr>
<td>Thumb Cellular</td>
<td>@sms.thumbcellular.com</td>
</tr>
<tr>
<td>T-Mobile</td>
<td>@tmomail.net</td>
</tr>
<tr>
<td>Tracfone</td>
<td>@cingularme.com</td>
</tr>
<tr>
<td>Unicel</td>
<td>@utext.com</td>
</tr>
<tr>
<td>USA Mobility</td>
<td>@usamobility.net</td>
</tr>
<tr>
<td>Verizon</td>
<td>@vtext.com</td>
</tr>
<tr>
<td>Virgin Mobile (Canada)</td>
<td>@vmobile.ca</td>
</tr>
<tr>
<td>Virgin Mobile (USA)</td>
<td>@vmobil.com</td>
</tr>
</tbody>
</table>

- From the **Format** list, select how the e-mail appears on your screen:
  - **E-mail HTML**: Displays text formatting, bullets, numbers, pictures, etc.
  - **E-mail Text**: Displays only un-formatted text
  - **Text Message**: Displays abbreviated messages (approximately 200 characters) for mobile devices.

- Select the **Receive notifications at this e-mail address** check box if you want NextGen Patient Portal to send notifications to this e-mail address.
- Click **Add**.
- A message that your e-mail has been added.

4 To update an e-mail address:
- Click the **Edit** link next to the e-mail you want to change.
Information about the selected e-mail displays.

Edit the details (field names with red asterisks are required).

Click Update.

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

5 To delete an e-mail address:

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

Information about the selected e-mail displays

Click Delete.

A confirmation message displays.

Click OK.

Managing your Phone Numbers

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

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

To manage your phone numbers:

1 In the Settings menu, select My Information.

Information about your account displays.

2 Scroll to the Phone section.

3 To add another phone number:
Click the Add link.
A blank phone number form displays.

Enter the requested information (field names with red asterisks are required).
Click Add.
A message that your phone number has been added displays.

4 To update a phone number:
Click the Edit link next to the phone number you want to change.
Information about the selected phone number displays.

Make your changes as needed (field names with red asterisks are required).
Click Update.
A message that your phone number has been updated displays.

5 To delete a phone number:
Click the Edit link next to the phone number you want to change.
The information about the selected phone displays.
Click Delete.
A confirmation message displays.

![Message from webpage](image)

A message that your phone number has been deleted displays.

**Managing User Grants**

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

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

**Managing Care Manager Accounts**

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

**To manage people managing your account:**

1. In the **Settings** menu, select **Manage User Grants**.

The **Manage User Grants** page opens and displays a list of people associated with your account.
2 In the **Who Manages My Account** section, click **Edit** link next to the person to view their rights and permissions.

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

3 To set individual view and access rights:
   - Clear the **Allow full access to my account** check box.
   - In the **View** column, select the check box next to each module to enable the person managing your account to view related information. For example, open and read documents.
   - In the **Send/Complete** column, select the check box next to each module to enable the person managing your account to perform a related action. For example, make and confirm appointment requests.

4 To set an expiration date when the selected person can no longer manage your account:
   - Click the button next to "Access expires."
   - Click the **Calendar** icon to select the date.
   - If you do not want the rights for selected person managing your account to expire, click **Never expires**.

5 To remove a care manager from your account:

   **Note:** This action does not delete the user, but only the access permissions to the account.
   - Click **Delete**.
     - A confirmation message displays.
   - Click **OK**.
Managing Dependent Accounts

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

To remove a dependent from your account:

1. In the Settings menu, select Manage User Grants.
   
   The Manage User Grants page opens and displays a list of people associated with your account.

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

3. Click Delete.
   
   **Note:** This action does not delete the user, but only the access permissions to the account.
   
   A confirmation message displays.

4. Click OK.

Managing Practices

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

Enrolling to Practices in the same Enterprise

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

1. Log on to your NextGen Patient Portal account (see "Logging On to your NextGen Patient Portal Account" on page 23).
   
The *Add new practices* page displays if your practice has enrolled you to NextGen Patient Portal in the same enterprise.

2. Select the check box provided for the practice name.
   
   **Note:** Select the *Add Practice* check box to select all practices.

3. Click *Add Selected Practice(s).*

   The selected practices are added to your account and appear in the *Home* page and *Manage Practices* page.

   You can perform the following additional actions:

   - Click *Decide Later* to complete enrollment at a later point in time.
   - Click *Decline Pending Enrollment* if you do not want to enroll to a practice(s).

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

### Confirming Pending Enrollment Requests

This procedure will help you to enroll to a practice from the *Manage your practices* page.

To confirm pending enrollment requests:

1. Log on to your NextGen Patient Portal account (see "Logging On to your NextGen Patient Portal Account" on page 23).

2. In the *My Account* tab or navigation pane, click the *Manage Practices* link.

   The pending enrollments display.

   - Click the *Add this practice to my account* link for the practice.
Chapter 11  Settings

The buttons to complete or decline enrollment display.

4 Click **Complete Enrollment**.

The enrolled practice displays in the currently enrolled practices list and on the *Home* page.

**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.

### Enrolling in another Practice

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

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

**To set up an account with another practice:**

1. Log on to your NextGen Patient Portal account (see "Logging On to your NextGen Patient Portal Account" on page 23).
2. In the *My Account* tab or navigation pane, click the *Manage Practices* link.
An enrollment form displays and list the practices where you are currently enrolled.

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

4 Click **Submit**.

A confirmation message displays if you are enrolled.

5 Click **OK** to continue.

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

---

**Un-enrolling from the NextGen Patient Portal**

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

**To un-enroll from the NextGen Patient Portal:**

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

**Note:** You can also un-enroll from the **Account Settings** (see "Un-enrolling from the NextGen Patient Portal" on page 83) tab.
An enrollment form displays and list the practices where you are currently enrolled.

2  Click the **Un-enroll me from this practice** link.
A form to un-enroll from NextGen Patient Portal displays.

3  Select the **Reason** you are un-enrolling from the corresponding list.
4 Click the **Un-enroll** button.
   A confirmation message displays.

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

### Managing Statement Notifications

If enabled by your practice, you can select to receive only electronic statements through NextGen Patient Portal. If you do not select this option, you will receive both electronic and paper statements.

**To manage your statement notifications:**

1 From either the **My Account** tab or navigation pane, click the **Statement Notifications** link.
   The *Go Paperless!* page displays.

2 If you want to receive only online statements for all practices that provide this service, select the **Receive only electronic statements** check box.
   If you want to receive both electronic and paper statements for all practices, clear the **Receive only electronic statements** check box.
   If you are enrolled in multiple practices that provide this service and want to select different options for each practice, select or clear the corresponding check box as needed.

3 Click **Submit**.
NextGen Patient Portal Mobile

NextGen Patient Portal Mobile provides most of all the features available on the NextGen Patient Portal Website and is very similar in functionality.

**Prerequisite**

NextGen Patient Portal Mobile supports the following devices and browsers.

**Supported Devices**

Supports the following mobile phones and tablet devices:

- Samsung Galaxy S3
- Samsung Galaxy S4
- Apple iPod Touch
- Nexus 7
- Windows 8 Tablet
- Apple iPhone

The system displays a warning message if the device is not compliant with the NextGen Patient Portal Mobile’s security policies.

**Supported Browsers**

NextGen Patient Portal Mobile works with the following browsers on iPhone and Android devices:

- Microsoft® Internet Explorer 9 and 10
- Android Browser
- Safari (iPhone)
- Mozilla Firefox
- Google Chrome
- Opera

The system displays a warning message when the browser does not meet the minimum requirements to use NextGen Patient Portal Mobile.
**System Requirements**

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

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

**Getting Started**

This section provides information to access NextGen Patient Portal Mobile and register.

**Accessing NextGen Patient Portal Mobile**

You can access NextGen Patient Portal Mobile if you are enrolled in the NextGen Patient Portal Website. You can access NextGen Patient Portal Mobile using the URL provided by the practice.

**To access NextGen Patient Portal Mobile:**

1. Open a supported browser.
2. Enter the URL provided by the practice or click the link provided in the enrollment success email.

The login screen displays.

You can view the privacy policy, change the language, or access the NextGen Patient Portal Mobile Website from the login page.
3 Enter your user name and password.
4 Click **Login**.
   The page for the security question displays.
5 Enter the answer for the security, and click **Submit**.
   The home page displays.

**Recovering Username or Resetting Password**

The procedure to recover username or reset password is the same as NextGen Patient Portal Website. Click the **I forgot my username/password** link on the login page to access the following options to recover username or reset password:

- I have my username
- I’m having problems signing in
- I have my reset token

For more information about recovering username or resetting password, see "User Name and Password Recovery" on page 26.

**Registering in NextGen Patient Portal Mobile**

You need not register again in NextGen Patient Portal Mobile if you are enrolled in the NextGen Patient Portal Website. The procedure for registering in NextGen Patient Portal Mobile is the same as enrolling in the NextGen Patient Portal Website with the following differences:

- During self-enrollment (see "Enrolling in NextGen Patient Portal" on page 13), the CAPTCHA displays first after you accept the license agreement.
- For token-based enrollment (see "Enrolling in NextGen Patient Portal with Token" on page 20), you must click **Register Now** on the NextGen Patient Portal Mobile login page.

For more information, see "NextGen Patient Portal Enrollment" on page 13.

**Home Page**

The NextGen Patient Portal Mobile home page works similar to the NextGen Patient Portal Website’s home page (see "Home Page" on page 33) with the following differences:

- Medications and Lab Results do not display
- A calendar displays. Click a date in the calendar to view the appointments for the day.
A date that has appointments displays with a colored top-right corner. The Home page displays differently based on the screen size of the device.
Changing the User

The user icon on the top section displays the name of the logged in user. The user icon also displays a list of the persons or dependents whose accounts you manage. You can select the name of the person or dependent from the list to view their records. Click the down arrow to display the list of users.

NextGen Patient Portal Mobile Menus

The NextGen Patient Portal Mobile provides two menus for easy access on a mobile device:

1. The menu at the bottom of the page provides access to the following pages:
   - Home page
   - Inbox
   - My Chart
   - Meds
   - Schedule
   - Labs
   - Statements
   - Notices
   - Feedback

   The Inbox icon on the menu displays the number of unread messages. The Notices page displays the practice information and welcome message. The Feedback page displays a feedback form to assess the usability of NextGen Patient Portal Mobile.

2. A sliding menu displays on the left when you click the menu button on the top-left corner. In addition to the features displayed in the menu at the bottom of the page, this sliding menu provides access to the following pages:
   - Sent Mail
   - Request Health Record
   - Logout
   - Settings
     - Language
     - Profile
     - My Practices

Navigating NextGen Patient Portal Mobile

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

- Click an item on the menu at the bottom of the page.
- Click the menu button on the top-left corner, and click a menu item.
- Click the back button to return to the previous page.
- Click the left or right arrows to display the previous and next view.
- Click the down or up arrow to expand or collapse a section.
Click the down or up arrow to expand or collapse a list.
Click the compose button to send an email to the practice.

**Filtering Items**

You can filter the list of items that display in the Inbox, Sent Items, and Meds pages. Enter text in the Search field to filter the items. The items filter as you enter the text. For example, enter “message” to view only the messages or enter “pdf” to view only the PDF documents in the Inbox. Enter the medication name in the Search field to filter the medications.

**Inbox**

The Inbox displays all incoming items from all practices in which you are enrolled including those of the guardians.

**Accessing the Inbox**

You can access all incoming items by clicking Inbox from:

- The menu at the bottom of the page
- The sliding menu on the left
- The Inbox section on the Home page dashboard

The following table provides the list of icons that display for the messages in the Inbox and their description.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✉️</td>
<td>Message</td>
</tr>
<tr>
<td>📅</td>
<td>Appointment</td>
</tr>
<tr>
<td>📄</td>
<td>Document</td>
</tr>
<tr>
<td>🦷</td>
<td>Interactive Medical Form</td>
</tr>
<tr>
<td>🌡️</td>
<td>Medication</td>
</tr>
<tr>
<td>📂</td>
<td>Template</td>
</tr>
<tr>
<td>📧</td>
<td>Personal health record</td>
</tr>
<tr>
<td>⚖️</td>
<td>Statement</td>
</tr>
</tbody>
</table>

**Note:** This version of NextGen Patient Portal Mobile does not support Interactive Medical Forms and Templates. Use the NextGen Patient Portal Website for accessing Interactive Medical Forms (see "Submitting an Interactive Medical Form" on page 42) and Templates (see "Submitting a Template" on page 41).
Viewing and Replying to Messages

The Inbox displays all the read and unread items. Unread items appear in bold text. The NextGen Patient Portal Mobile enables you to view messages from your practice and send a response.

**To view and reply to a message:**

1. Access the Inbox.
2. Click the message in the Inbox.
   - The message opens.
3. Click the reply button.
4. Enter your response, and click **Send**.

**Note:** Click the delete button to delete a message, medication request, or an appointment request.

Sent Mail

The Sent Mail page displays all messages, appointment requests, and medication renewals you sent to the practices. The PHRs that you sent to other providers also display in sent items.

To access a sent mail item:

1. Select **Sent Mail** from the sliding menu.
2. Click an item to open.
   - The message details display.

**Note:** Click the delete button to delete a message, medication request, or an appointment request.

Request Health Record

The health record is a document that contains all the information from your chart. The following procedure describes how to request a health record from the practice.

To send a request for health record:

1. Select **Request Health Record** from the sliding menu.
   - A disclaimer displays.
2. Click **OK**.
   - The health record request page displays.
3. If enrolled in multiple practices, select the practice name from the practice list.
4. Click **Submit**.
**My Chart**

The chart on NextGen Patient Portal Mobile provides you the chart information available at your practice.

**Viewing the Chart**

The chart displays the details of the latest visits and the chart information from the practice.

**To view the chart:**

1. Click **My Chart** in the menu at the bottom of the page or from the sliding menu.

   **Note:** The charts with names of the persons you manage display if you are managing your dependents accounts. Click the name of the person to view the chart.

   The chart displays.

2. Click an item in the chart to view the details.

   For more information about the details in the chart, see "Viewing the Chart" on page 61.
Sending a Chart to a Provider

You can send your PHR to another provider.

To send the chart:
1. Click My Chart in the menu at the bottom of the page or from the sliding menu. The chart displays.
2. Click the chart options button.
3. If you are enrolled in multiple practices, select the practice name from the practice list.
4. Select the chart date for the chart that you want to send.
5. If you know the provider’s email address, enter the same in the Provider’s email address text box, and click Send My Chart.
6. If you do not know the provider’s email address, click I don’t have the provider’s direct address.
7. Enter any of the provider’s details, and click Search. A list of matching provider names display if they are found in the system.
8. Select the provider, and click Send My Chart.

Downloading and Saving PHRs

A PHR is a document that contains all the information from your chart. You can download and save the PHRs as a PDF file. You need the Adobe Acrobat Reader to view the PDF file.

To save the PHRs as a PDF file:
1. Click My Chart in the menu at the bottom of the page or from the sliding menu. The chart displays.
2. Click the chart options button.
3. Click View/Download Chart (PDF) to view the details in the PDF format.

Note: You can also open the PHR from the Inbox (see “Viewing PHRs” on page 39).

The PHR details display in a new window as a PDF document.
4. Save or print the document using the PDF options.

Meds

The medications prescribed at the practice display in your NextGen Patient Portal Mobile.

Viewing Medications

You can view the medications prescribed at your practice.

To view the medications:
1. Click Meds in the menu at the bottom of the page or from the sliding menu on the left. A disclaimer message displays.
2. Click OK. The active medications display.
3 Select the Include inactive medications check box to view the inactive medications.

Renewing Medications

You can send a request to your practice to renew your medications online.

To renew your medications:
1 Access the medications page. (See "Viewing Medications" on page 109)
2 Select the check box next to Renew for the medications that you want to renew.

3 Click Continue.
**Note:** The icon on the top-right of the page displays the number of the medications that you select for renewal. You can click the icon to renew the medications.

The medications renewal page displays.

The page displays the selected medications at the top.

4 Click **Edit** if you want to view and select different medications.

The preferred pharmacy displays by default under the selected medications.

5 Enter the pharmacy name, address, or zip code, and click the search button to display a list of pharmacies.

6 Click the pharmacy's name to select a pharmacy.

7 Select the **Save as my preferred pharmacy** check box to set the selected pharmacy as the default pharmacy.

8 Click **Directions** to view the location of the pharmacy in a map, in a new window.

9 Select the provider’s name from the provider list.

10 Enter any comments, and click **Send Request**.

**Appointments**

The Appointments page displays the list of existing appointments and enables you to request or book new appointments.

**Accessing Appointments**

NextGen Patient Portal Mobile provides multiple options to access your appointments.

- Click **Appointments** from:
  - The menu at the bottom of the page
  - The sliding menu on the left
› Click **Upcoming Appointments** on the Home page dashboard.
› Click a date in the calendar on the Home page dashboard.

**Viewing Appointments**

In NextGen Patient Portal Mobile, you can view a list of all appointments or appointments for a particular date in a calendar.

The calendar view displays by default when you click a date in the calendar on the Home page dashboard. The present date is highlighted in blue. A date that has appointments displays with a colored top-right corner. The display of appointments depends on your previous selection when you click **Appointments** in the menu at the bottom of the page or the sliding menu. For example, the calendar view displays if you had selected the calendar view the last time you viewed the appointments. Move the slider to the left to view the list of all appointments. Move the slider to the right to view the appointments in a calendar.
You must click the down arrow to view the details of the appointment.

**Requesting an Appointment**

Requesting appointments in NextGen Patient Portal Mobile is similar to NextGen Patient Portal Website with the following differences:

- Click the add appointment button to create an appointment request.
- The names of the person on whose behalf you want to schedule an appointment displays first, and then the practice.
- The hours of operation do not display when you select a non-integrated appointment category.
- The preferred date range displays as a list with the following options:
  - This Week
  - Next Week
  - This Month
  - Next Month
  - Within 3 Months
- The preferred and alternate time display as a list with the following options:
  - Early Morning
  - Afternoon
  - Evening
Accepting or Confirming a Pending Appointment

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

To accept or confirm a pending appointment request:

1. Open the appointment from the Inbox.
   The appointment request details display.

   ![Appointment Request Screenshot]

2. Click Accept/Confirm Appointment to accept the appointment.
   A message that your appointment response has been successfully submitted displays.
Replying to a Pending Appointment

You can send a reply to change the appointment from a pending appointment request message.

**To send a reply from a pending appointment request:**
1. Open the pending appointment from the Inbox. The appointment request details display.
2. Click the reply button. The **Reason for new Appointment** box displays.
3. Enter the reason to change the appointment.
4. Click **Send**. A message that your appointment response has been successfully submitted displays.

Rescheduling an Appointment

You can reschedule a booked appointment before the appointment date.

**To reschedule an appointment:**
1. Access the appointments. (See "Accessing Appointments" on page 111)
2. View the appointment details. (See "Viewing Appointments" on page 112)
The appointment details display.

3 Click **Reschedule**.

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

A list of reasons to reschedule displays.

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

4 Select a **Reason**, and click **Submit**.

A disclaimer message displays.

5 Click **OK**.

The page to create a new appointment displays.

6 You can now start a new appointment request (see "Requesting an Appointment" on page 113). The message that this appointment has been canceled displays in the appointment details.
**Cancelling an Appointment**

You cancel an appointment that was booked using your NextGen Patient Portal account. You can cancel a booked appointment before the appointment date. You can also cancel an appointment request from the Sent Mail.

**To cancel an appointment:**

1. Access the appointments. (See "Accessing Appointments" on page 111)
2. View the appointment details. (See "Viewing Appointments" on page 112)
3. Click **Cancel**.

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

A list of reasons to cancel displays.

![Cancel Appointment](image)

**Note:** The **Cancel** link is not available when reasons to cancel are not set up at the practice. Contact the practice to cancel the appointment.

4. Select a **Reason**, and click **Submit**.
   
   The message that this appointment has been canceled displays in the appointment details.

**Labs**

The Labs page allows you to view the lab results.

**Viewing Lab Results**

You can view the lab results sent by the practice.

**To view the lab results:**

1. Click **Labs** in the menu at the bottom of the page or the sliding menu.
   
   The lab results display.
2 Click the down arrow to view the details.

**Statements**

You can view and pay statements in NextGen Patient Portal Mobile similar to the NextGen Patient Portal Website.

**Making Payments**

You can pay the statements you receive from your practice online through NextGen Patient Portal Mobile.

*Note:* Some practices may not accept online payments. Contact your practice to check if they accept online payments.

**To make payments:**

1 Click **Statements** in the menu at the bottom of the page or the sliding menu.
   Your latest statement details display.

2 Click the down arrow to view the details.

3 Click **Pay**.
The page to make the payment displays.

4 Select a payment method in the **Card Type list** (Visa, MasterCard, American Express, Discover or eCHECK).

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

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

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

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

For **eCHECK Payments**, enter or select the following information:
   - Routing number
   - Account number
   - Bank account type (Checking or Savings)
Note: The bank routing number is the nine digit number located on the lower left of your check between the |: |: symbols. The bank account number is located to the right of the routing number and can be up to 17 digits long. There is no specific number of characters for a bank account number. Do not include the check number in either the account or routing numbers.

6 Select the billing address from the Select a billing address list.
If the billing address is different than the one displayed, select Other and then enter the information in the fields below (all fields are required).

7 Click Pay.
After successfully processing your payment, the system displays your payment receipt, places a copy of the payment in the Sent Mail page and sends an email to notify you that your payment was delivered to practice.

Note: It might take 24 to 48 hours for this transaction to be posted and appear on your statement.
**Settings**

Settings in NextGen Patient Portal Mobile enable you to change the language and modify the account’s security information, personal information, and practice information.

**Accessing Settings**

You can access the following settings from the sliding menu:

- Language
- Profile
- My Practices

**Changing the Language**

NextGen Patient Portal Mobile provides multi-language support.

**To change the language:**

1. Select **Language** under **Settings** from the sliding menu.
   - The list of available languages display.

2. Select a language.
   - The display changes and a check mark displays for the selected language.

**Updating the Profile**

Updating settings in NextGen Patient Portal Mobile is similar to NextGen Patient Portal Website. Account Settings in the NextGen Patient Portal Website combines the setting for username, password, and security question. NextGen Patient Portal Mobile displays each setting in a separate page.

**Changing your Username**

You can change your user name that was created when registering in NextGen Patient Portal. (See "Changing your User Name" on page 79).

**Changing your Password**

You can change your password that was created when registering in NextGen Patient Portal. (See "Changing your Password" on page 80).
Changing the Security Question
You can change the account’s security question that was created when registering in NextGen Patient Portal. (See "Changing your Security Question" on page 81).

Changing the Forgot Password Question
You can change the account’s forgot password question that was created when registering in NextGen Patient Portal. (See "Changing your Forgotten Password Question" on page 82).

Changing Personal Information
You can change the following information that was entered when registering in NextGen Patient Portal. (See "My Information" on page 84).
  › Name
  › Date of birth
  › Address
  › Email address
  › Phone number
Click the edit button to modify the information. Click the Add link to add information.

Managing User Grants
You can view and update the following information:
  › Who Manages My Account (See "Managing Care Manager Accounts" on page 92)
  › Accounts I Manage (See "Managing Dependent Accounts" on page 94)

Managing Statement Notifications
  › You can change how you receive statements. (See "Managing Statement Notifications" on page 99)

Managing Practices
Managing the practice information in NextGen Patient Portal Mobile is similar to NextGen Patient Portal Website.

Enrolling to Practices
You can enroll to multiple practices in the same enterprise in NextGen Patient Portal Mobile similar to NextGen Patient Portal Website. (See "Enrolling to Practices in the same Enterprise" on page 94)

Managing Pending Enrollments
You can accept or decline enrollment to a practice in NextGen Patient Portal Mobile similar to NextGen Patient Portal Website. (See "Confirming Pending Enrollment Requests" on page 95)
**Enrolling in another Practice**

You can enroll in a practice in a different enterprise in NextGen Patient Portal Mobile similar to NextGen Patient Portal Website.

To enroll to a practice:

1. Select **My Practices** under **Settings** from the sliding menu.
2. Click the **Add** link.
   
   The page to enroll to a practice displays.

3. Enter the security token (with dashes in the format xxx-xx-xxx) provided by the practice.
4. Enter your email address.
5. Click **Submit**.

**Un-enrolling from a Practice**

You can un-enroll from a practice in NextGen Patient Portal Mobile similar to NextGen Patient Portal Website.

To un-enroll from a practice:

6. Select **My Practices** under **Settings** from the sliding menu.
7. Click the ** flee** button for the practice.
   
   The page to un-enroll from the practice displays.

8. Select the reason to un-enroll form the **Select a reason** list.
9. Click **Submit**.
**Feedback**

You can provide feedback about the usability of NextGen Patient Portal Mobile. This feature might be available only for a limited time.

**Providing Feedback**

NextGen Patient Portal Mobile provides a feedback form where you can select your ratings for different parameters.

**To provide your feedback:**

1. Click **Feedback** in the menu at the bottom of the page or the sliding menu. The feedback form displays.

2. Select your rating for each parameter.

3. Click **Send Feedback**.

OR e-mail us at mobilepatientportal@nextgen.com
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