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CHAPTER 1

Features of NextGen Enterprise Patient Portal

NextGen® Enterprise Patient Portal provides you with a fast, reliable, and easy-to-use method to communicate with your medical service provider through a convenient, safe, and secure environment. You can:

• Enroll with multiple practices
• Request, book (real-time) and/or cancel appointments
• Request medication renewals
• Send and receive secure messages to and from your provider
• Complete, submit, and review online forms
• Complete, submit, and view Interactive Medical Forms
• Request Personal Health Record (PHR)
• View the chart with health record details
• Receive and review documents
• Receive and review patient education material
• Update account information
• View statements online
• Make payments online

Note: If your practice has customized NextGen Enterprise Patient Portal, some of the features listed and described throughout this document may not be available on your NextGen Enterprise Patient Portal account.
Web Browser Requirements

NextGen Enterprise Patient Portal works best with the following:

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

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

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

The latest versions of internet browsers, support 128-bit SSL encryption (which is a way of making information secure). To determine if your browser supports 128-bit encryption, click Help on your browser's menu bar and select About. If your browser does not support 128-bit SSL encryption, visit the respective company website and upgrade.

Internet Security Considerations for NextGen Enterprise Patient Portal

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

- Never save usernames and passwords for any websites on the internet. Saving a password can be useful but can put your personal information at risk. If possible, you should disable the save password option so no one else can log on to your account.

- Select the five login security questions from the list and type your answers. All the security questions must be different. The security questions and answers are important to protect your confidential medical information and your account related security.

- For a public or shared computer, it is important that you always log off completely by clicking the Log Out option. Logging off makes it impossible for any other person (using the same computer) to view the contents of your account. Wherever possible, delete the web browser's cache and cookies. The cache maintains a copy of web pages that have been viewed recently.

- Keep your computer antivirus program up-to-date and make use of a firewall.
• Do not leave your computer unattended while logged on to NextGen Enterprise Patient Portal. If you have to leave your computer unattended, log off from all programs and close all the open windows that may display sensitive information. You are automatically logged off if there is no online activity for 20 minutes.

⚠️ CAUTION: To comply with the Health Insurance Portability and Accountability Act (HIPAA) and the Certification Commission for Healthcare Information Technology (CCHIT) requirements for security of patients’ medical information, NextGen Healthcare strongly recommends that any and all instances of patients’ Protected Health Information (PHI) that are stored on portable media devices be encrypted using the Advanced Encryption Standard (AES) – 128-bit or higher.

### Username and Password Policy

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

- Enrollment
- Logon
- Account Settings

The username and password policies are as following:

- Your username must be unique. You must provide a username in between 6 to 50 characters and it can be a combination of alpha-numeric and special characters (except any whitespace as character). The user name is not case sensitive.

- You must choose a password that is easy to remember but difficult for others to guess. The password must be in between 8 to 200 characters. The password must be a combination of upper or lower case letters, numbers, and special characters. You should not use commonly used passwords such as `password` or `password1`. To get the mostly used password details, visit the [list of most common passwords](#) page. If the password meets the password policy, then the corresponding ✗ marks for each criterion will change to ✓ mark.

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

### Email Notifications

You can receive an email notification:

- When you receive any correspondence from the practice, such as appointments, documents, statements, medications, messages, templates, interactive medical forms, and personal health record.

- When your practice locks or unlocks your accounts.

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

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

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

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

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

Enroll Using a Token

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

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

   Note: If you do not wish to provide your email address, select I do not wish to provide an email address. Then the Email address field will not be available.
5. Click Next.
**Note:** If your email address is already associated with an existing account, you will be redirected to the **Account credentials** page. If you see a message that says your email address is already associated with another account, probably you already have a NextGen Enterprise Patient Portal account using the same email address. You can either add or append the practice to your existing account or you can type a new email address to create a new account. For more information, see the Email Address Associated with an Existing Account *(on page 21)* section.

The **Account options** opens.

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

**Add to an Existing Account**

1. On the **Account credentials** page, under **Verify your account**, type the username and password for your existing account, and click **Next**.
   If you have already enabled two-step verification using Google Authenticator earlier, you will be redirected to NextGen Enterprise Patient Portal home page. Otherwise, the **Google Authenticator** page opens.
2. On the Google Authenticator page, do one of the following:
   - To set up Google authentication for your NextGen Enterprise Patient Portal account, click Get started (on page 15).
   - If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click I am not interested.

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

**Create a New Account**

1. On the Account credentials page, under Set up account, do the following:
   a. In Username, type your username.
   b. In Password, type your password.
      For more information about the latest user name and password policies, see the Username and Password Policy (on page 9) section.
   c. In Confirm Password, re-type your password.
2. Click Next.
   The Security questions page opens.
3. Under Set up security questions, select all five security questions and type the answers. Make a note of the security questions and associated answers for account recovery in future.
4. Click Submit.
   The Google Authenticator page opens.
5. On the Google Authenticator page, do one of the following:
   • To set up Google authentication for your NextGen Enterprise Patient Portal account, click Get Started (on page 15).
   • If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click I am not interested.

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

**Use Google Authenticator to Secure your Account**

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

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

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

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

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

**Enroll Using Temporary Username and Password**

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

1. On the logon page, click Create Account. The Terms and Conditions page opens.
2. Read the terms and conditions and click I Accept. The New to Patient Portal page opens.
3. Click I have a temporary username and password. The Temporary username and password page opens.
4. On the Temporary username and password page, under Enter temporary username and password, do the following:
   a. Type the temporary username provided by the practice.
   b. Type the temporary password provided by the practice.
5. Click Next.
   The Account credentials page opens.
6. On the Account credentials page, under Set up account, do the following:
   a. In Username, type your username.
   b. In Password, type your password.
   c. In Confirm Password, re-type the password.
   For more information about the latest username and password policies, see the Username and Password Policy (on page 9) section.
7. Click Next.
   The Security questions page opens.
8. Under Set up security questions, select all five security questions and type the answers. Make a note of the security questions and associated answers for account recovery in future.
9. Click Submit.
   The Google Authenticator page opens.

10. In the Google Authenticator page, do one of the following:
    • To set up Google authentication for your NextGen Enterprise Patient Portal account, click Get started, and do the following:
      • If you are an Android user, click I have an Android phone; if you are an iPhone user, click I have an iPhone.
      • Point your Android phone or iPhone at the QR code to scan and verify Google Authenticator's connections with your account and click Next. You will receive a six-digit authentication code.
      • Type the verification code and click Verify to access the NextGen Enterprise Patient Portal home page.
      • If you do not want to enable Google authentication for your NextGen Enterprise Patient Portal account, click I am not interested, and click Continue to access NextGen Enterprise Patient Portal home page.
Note: If you have enrolled without setting up Google Authenticator, you can set it up from the home page. From your home page, click Settings > Account Settings > Google Authenticator.

**Enroll Using an Invitation Link**

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

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

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

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

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

### Self-Enroll for NextGen Enterprise Patient Portal Account

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

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

### Sign Up for a New Account

1. On the **Practice options** page, under **Select Medical Practice**, select your practice from the **Practice** list.
2. Click **Next**.
   The **Personal information** page opens.
3. Under **Enter personal information**, type your required information such as name, address, phone number, date of birth, and email address.
4. Click **Next**.
   The **Insurance information** page opens.
5. Under **Enter insurance information (optional)**, do the following as required:
   - Type your health insurance details
   - Type the insurance claim mailing address
6. Select **I'm not a robot** and click **Next**.
   The **Account credentials** page opens.
7. On the **Account credentials** page, under **Set up account**, do the following:
   a. In **Username**, type your username.
   b. In **Password**, type your password.
   c. In **Confirm Password**, re-type your password.
For more information about the latest user name and password policies, see the Username and Password Policy (on page 9) section.

8. Click Next.
10. Under Set up security questions, select all five security questions and type the answers. Make a note of the five security questions and associated answers for account recovery in future.
11. Click Next.
   A submit enrollment request appears that states that your request has been sent to the practice and pending for approval from your practice. Once approved, you will receive a confirmation email for the same.
12. Do any of the following:
   • If the appointment module is enabled for the practice:
     • To send your enrollment request to the practice for approval, click Complete enrollment. You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
     • To request an appointment before completion of your enrollment, click Request an appointment. You will receive a pending approval message stating that your appointment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
   • If the appointment module is not enabled for the practice, click Complete enrollment to send your enrollment request to the practice for approval. You will receive a pending approval message stating that your enrollment request has been submitted and approval is pending from your practice. Once approved, you will receive a confirmation email for the same.
Add to an Existing Account

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

Email Address Associated with an Existing Account

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

| If You are enrolling in NextGen Enterprise Patient Portal using a token | Scenario If your email address is already associated with an existing account and your name and date of birth matches the existing account's information, you can do one of the following: • Log on to the existing account and append or add a new practice to the existing account. |
If [Scenario]

<table>
<thead>
<tr>
<th>If</th>
<th>Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a new email address and complete the enrollment process. A new NextGen Enterprise Patient Portal account will be created. After completing enrollment, you will receive an email to verify your email address. Open the email and verify your email address. If your email address is already associated with an existing account and your name and date of birth does not match the existing account’s information, you must type a new email address and complete the enrollment process. A new NextGen Enterprise Patient Portal account will be created. After completing enrollment, you will receive an email to verify your email address. Open the email and verify your email address.</td>
<td></td>
</tr>
</tbody>
</table>

You are enrolling in NextGen Enterprise Patient Portal using an invitation link

If your email address is already associated with an existing account and your name and date of birth matches the existing account’s information, you can do one of the following:

- Log on to the existing account and append or add a new practice to the existing account.
- Enter a new email address to enroll. Open the email and verify your email address. After verifying the email address, you will be redirected to the Terms and Conditions page. Complete the enrollment. If your email address is already associated with an existing account and your name and date of birth does not match the existing account’s information, you must type a new email address and verify the email address. After verifying the email address, you will be redirected to the Terms and Conditions page. Complete the enrollment.
CHAPTER 3

Merge Your Multiple Accounts

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

• Merge your account (on page 23) page

• Account Settings (on page 93) page

Merge Accounts

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

![Merge your account window]

Note: You can merge only one account at a time. If you do not wish to merge your account, you can click Skip Now. Once you click Skip Now, you will not be prompted to the Merge Your Account page for next three months. After three months, the home page will display a notification to merge your accounts. In this three months, you can merge your account from the Account Settings page.
4. On the Verify Account window, type your username and password of the account you would like to merge with your current account, and click Submit.
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Note: Three unsuccessful attempts will redirect you to your NextGen Enterprise Patient Portal home page. The home page displays a message stating that the accounts cannot be merged and you can do the same in future from the Account Settings page.

5. Click Yes to confirm for merging accounts.

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

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

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

Merge More than Two Accounts

During each logon, you can merge only one account with the currently logged on account. If you have more than two accounts, you can merge the remaining account the next time you log on or merge it from the Account settings page immediately after the first merge.
CHAPTER 4

NextGen Enterprise Patient Portal Web Account Access

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

Change NextGen Enterprise Patient Portal Language

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

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

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

NextGen Patient Access API

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

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

Log On to NextGen Enterprise Patient Portal Account

1. Access the NextGen Enterprise Patient Portal website.
2. Enter your **Username** and **Password** and click **Log In**. For more information about username and password policy, see **Username and Password Policy (on page 9)**

The practice which you are currently enrolled can provides you with an option to receive only electronic statements. If you are enrolled to receive only electronic statements, click **Go Paperless**. Otherwise click **Decide Later**. You can register your preference later. For more information about enabling this notification, see the **Manage Statement Notifications (on page 105)** section.

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

Your home page displays your account name on the top left.
Log Off from NextGen Enterprise Patient Portal Account

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

NextGen Enterprise Patient Portal Session Time Out

If NextGen Enterprise Patient Portal does not detect any activity for more than 20 minutes, it automatically logs you off.
• Before logging you off, the portal prompts you to extend the session. Click **Continue** to extend the session.

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

### Locked Accounts

You cannot access your NextGen Enterprise Patient Portal account, if:

• You type incorrect logon details four times consecutively, the portal locks your account. After your second and third failed attempts to log on, NextGen Enterprise Patient Portal displays an alert message stating that your account has been locked because of incorrect logon attempts.

Your account will be automatically unlocked only after 20 minutes. You can logon using the correct credentials after this session.

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

### Change the User

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

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

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

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

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

Recover Logon Details

You can perform any of the following:

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

Recover Username

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

1. Access the NextGen Enterprise Patient Portal website logon page.
2. Click Forgot username.
3. Type your verified account email address.
4. Click Submit.
**Note:** If you do not have a verified account email address, type your notification email address and click **Submit**. Then, you must type your **Last Name, Date of birth (mm/dd/yyyy)**, and click **Submit**. A message appears notifying you that an email containing your username has been successfully sent.

5. Open the email to view your username.

**Reset Password**

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

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

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

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

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

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

6. Under the **Reset Password** page, enter the following information:
   a. Type your password
   b. Re-type your password
7. Click **Submit**.
   The NextGen Enterprise Patient Portal home page opens.

### Reset Password with a Reset Token

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

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

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

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

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

   The NextGen Enterprise Patient Portal home page opens.
CHAPTER 5

Your Mail

You can send messages, view messages, or reply to messages sent by your practice. You can also perform the following:
• View documents sent by your practice
• View appointments
• View medications
• Make payments
• Complete and submit online forms
• Complete and submit Interactive Medical History forms
• Access Personal Health Record
• Access communications regarding appointments

View Your Messages

You can view inbox messages, documents, forms, PHR, and interactive forms sent from your practice.

• On the NextGen Enterprise Patient Portal home page, click the Mail tab, and then select Inbox. The inbox opens.

From the Inbox, you can any of the following:
• View your appointments from inbox: For more information about view your appointments from inbox, see the View Your Appointments from Inbox (on page 37) section.

• View attached documents: For more information about view attached documents, see the View Attached Documents (on page 38) section.

• Access statement from inbox: For more information about access statement from inbox, see the Access Statements from Inbox (on page 39) section.

• View medications: For more information about view medications, see the View Medications (on page 40) section.

• View messages: For more information about view messages, see the View Messages (on page 41) section.

• Reply to messages: For more information about replying to messages, see the Reply to Messages (on page 41) section.

• Submit a form: For more information about submit a form, see the Submit a Form (on page 42) section.
• Submit an interactive medical form: For more information about submit an interactive medical form, see the Submit an Interactive Medical Form (on page 43) section.

• View Personal Health Records: For more information about view Personal Health Records, see the View Personal Health Record (PHR) (on page 44) section.

• Delete inbox items: For more information about delete inbox items, see the Delete Inbox Items (on page 44) section.

• Print inbox items: For more information about print inbox items, see the Print Inbox Items (on page 45) section.

View Your Appointments from Inbox

You can view your appointments, and respond to pending appointment requests, if required. Pending appointments are those appointments that need to be accepted by you. Booked appointments are appointments which are accepted by you or an appointment scheduled with your practice.


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

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

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

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

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

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

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

Access Statements from Inbox

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

1. On the NextGen Enterprise Patient Portal home page, click Mail > Inbox
2. From the **Type** list, select **Statements**, and then click a statement communication.

![Image of Patient Portal]

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

3. From the statements details page, do any of the following:
   - Click **View Statement** to view statement.
   - Click **Pay Now** to make a payment.

   For more information about statements see the **Statements (on page 70)** section.

### View Medications

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

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

![Image of Mail Inbox]

2. From the **Type** list, select **Medications**, and then click a medication communication.
For more information about medication see the Renew Medication (on page 81) section.

View Messages

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

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

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

Reply to Messages

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

1. On the NextGen Enterprise Patient Portal home page, click Mail > Inbox
2. From the Type list, select **Messages**, and then click a communication containing message.

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

**Submit a Form**

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

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

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

3. Read the instruction and provide the required information on the template.

4. Click **Next** if form contains more than one page.
5. To submit a completed form, click **Submit Completed Forms**.

### Submit an Interactive Medical Form

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

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

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

3. From interactive medical form, you can:
   - Click **Next** to proceed to the next question.
   - Click **Back** to return to the previous question.
   - Click **Skip Question** to skip the question.
4. Review your information and perform any one of the following:
   • Click **Start Over** to go back and start from the first question.
   • Click **Submit** to send the completed form to the practice.

**View Personal Health Record**

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

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

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

![Screen capture of Patient Portal inbox]

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

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

**Delete Inbox Items**

You can delete inbox items from your inbox.

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

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

**View Sent Items**

You can view all your sent messages.

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

2. From the sent item, you can:
   • Filter the messages.
   • Sort the messages in ascending or descending order.
   • View the messages in the next page or select the page number.
   • To open a message, click an item from sent items.

**Print Inbox Items**

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

1. On the NextGen Enterprise Patient Portal home page, click **Mail > Inbox**
2. Open a message.
3. Click **Print**.
4. Select a printer and then click **Print**.

**Download Inbox Items**

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

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

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

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

3. To set the filter criteria for the download, do the following:
   a. Select the practice.
      
      The **Practice** list displays the names of all the practices that have sent messages to the patient. **All** is selected by default.

   b. From **Sent To**, select the patient's name.
      
      The **Sent To** list displays the names of the patient and dependents. **All** is selected by default.

   c. From **Type**, select the inbox item type which you want to download.
      
      **All** is selected by default.

   d. To set a date range, use the **From** and **To** calendars.
4. Click **Download Messages**.
   A message appears indicating that it may take some time to complete the download, and that patient portal activities might be interrupted while the download is in progress.

5. Do one of the following:
   - Click **Cancel** to stop the download.
   - Click **OK** to download the inbox items.

   A zip file with the name `ExportedMessages_<date of download><time of download>` is downloaded to your system.

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

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

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

**Send Messages**

You can send messages to your practice.

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

   Red asterisk indicates the required information.

   ![Compose Message](Image)

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

2. Under **Select Practice and Patient**, from the **Practice** list select a practice to which you want to send the message if you are enrolled to multiple practice.
3. In the **Select Message Category and Recipient** section:
   a. From the **Category** list, select the type of message you want to send.
   b. From the **To** list, select the recipient of the message.
   c. In **Subject**, type the subject of the message.
   d. In **Message**, type your message.
4. Click **Submit**.
   A confirmation message appears for your sent message.
CHAPTER 6

Your Appointments

This section provides information about using the Schedule tab to schedule and view appointments.

Request Appointments

Depending on how your practice schedules and books appointment requests received from NextGen Enterprise Patient Portal, you can:

- Submit an appointment request by selecting a preferred date and time and wait for a response from the practice.
- Book an appointment yourself, by searching online for an available appointment schedule date and time.

Create an Appointment Request

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

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

2. Under Select Provider and Location, do the following:
   - From Select provider/group, select the provider or group for your appointment.
   - From Select category, select type of appointment you want to schedule.
   - From Select location, select office or facility location where you want to schedule the appointment.
• To view the address of the selected location, click the **Address** link.

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

3. Submit the request and wait for a response.

**Submit the Request**

If you have selected a category that allows you only to submit a request for appointment, you can send a request with your preferred date and time. You must wait for a response from the practice. You must then reply to the response to confirm the appointment or suggest another time.

1. Create an Appointment Request **Request Appointments (on page 49)**.
2. Under **Submit Request**, enter or select the following information:
   • Enter the reason for the appointment in **Reason for appointment**.
   • From **Priority**, select the level of urgency (Low, Normal, or High).
   • From **Make appointment for**, select the time frame for your appointment.
   • In **Start date** and **End date**, select the start date and end date when you would like to schedule the appointment.
   • From **Preferred date/time**, select a time within the hours of operation, and then select a corresponding check box for the day when you would like to schedule the appointment.
   • From **Alternate date/time**, if available, select an alternate date and time when you would like to schedule the appointment. You can also select a corresponding check box for the day when you would like to schedule the appointment.
3. Click **Submit**.
   A message indicating that your appointment request has been successfully submitted displays.
   When the practice responds to your request, you will receive an email notifying you to log on to
   your account to review the appointment request response.

4. Open the request response to view if the [Accept a Pending Appointment Request (on page 54)](#).

5. If the suggested time is not suitable, you must either [cancel (on page 55)](#) or [reschedule (on page 56)](#) the appointment, and then create a new request.

**Book an Appointment Online**

Based on your practice’s portal preferences, you can book an appointment online.

1. Create an Appointment Request *(on page 49)*.
2. Under **Search Appointment**, enter or select the following information:
   - Enter the reason for the appointment in **Reason for appointment**.
   - From **Priority**, select the level of urgency.
   - From **Make appointment for**, select the time frame for your appointment, such as next week or
     next month.
   - In **Start date** and **End date**, select the start date and end date when you would like to schedule the
     appointment.
   - In **Preferred date/time**, select a time within the hours of operation, and then select a corresponding
     check box for the day when you would like to schedule the appointment.
3. Click **Search** and select an appointment from the list.

![Appointment Request](image)

**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.
4. To view more available appointments, click **Load more**. To go back to view more available appointment, click **Back to first available**.
5. Select an appointment, click **Book Appointment**

6. Click **Make another appointment** to make another appointment.
7. Click **Print for your records** to take a print of booked appointment.

**Accept a Pending Appointment Request**

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

1. Open the pending appointment from the Inbox.

2. Click **Accept**.
   
   A message notifies that your appointment response has been successfully submitted.
**Reply to a Pending Appointment Request**

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

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

2. Click **Reply**.

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

4. Click **Send**.
   
   A message notifies that your appointment reply has been successfully submitted.

**Cancel an Appointment Request**

You can cancel a pending appointment request.

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

2. Click **Recall Appt. Request**.
3. Click **OK**.

The pending appointment request is canceled.

**Reschedule a Booked Appointment**

You can reschedule a booked appointment before the appointment date.

1. From **Schedule**, click **My Appointments**, and then open a booked appointment.
2. Click **Reschedule This Appointment**.
3. You can also click **Reschedule** for the appointment in the **Upcoming Appointments** section in the home page dashboard.

   ![Reschedule Appointment](image)

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

4. Select a **Reason** and then click **Submit**.
   The selected appointment's status is set to canceled.

5. You can now start a new appointment request.

### Cancel a Booked Appointment

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

1. From the **Schedule** tab, click **My Appointments**, and then open a booked appointment.
2. Click **Cancel This Appointment**
3. From the **Reason** list, select a reason, and then click **Submit**.

![Reason selection screen](image)

**Note:** The **Cancel This Appointment** link will not be available when reasons to cancel are not set up at the practice. Contact the practice to cancel the appointment. The selected appointment's status is set to **Canceled**.

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

**Delete a Pending Appointment Request**

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

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

![Appointment Request](image)

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

The pending appointment request is removed from the patient account.

**Viewing Appointments**

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

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

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

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

3. Click Export to Calendar.

The appointment is saved as a .ics file. When prompted, you can open it directly or save it to your device.
Chapter 7

View your Personal Health Records

You can view your clinical data or request a PHR that contains your medical history from your practice.


2. Click a chart item on the left to view the chart details. (on page 61)

3. Do any of the following:
   - Click Download and send my chart to save your chart as a PDF. For more information about downloading and sending your chart details, see the topic, Download My Chart as PDF (on page 63).
   - Click Who has viewed my chart to view the activity log of a patient chart. For more information about viewing your chart activity log, see the topic See Who Viewed Your Chart (on page 69).

Sections in Personal Health Record

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

<table>
<thead>
<tr>
<th>Chart Item</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Overview</td>
<td>Height, weight and the current Body Mass Index(BMI).</td>
</tr>
<tr>
<td>Basic Information About You</td>
<td>Information like date of birth, address, phone number, sex, marital status, race and ethnicity.</td>
</tr>
<tr>
<td>Care Team Members</td>
<td>Name and address of providers.</td>
</tr>
<tr>
<td>Visits</td>
<td>The provider name, encounter type, medications from the latest visits.</td>
</tr>
<tr>
<td>Allergies, Adverse Reactions, Alerts</td>
<td>Names of the substances the patient is allergic to, reaction, severity, and status of the known allergies recorded at the practice.</td>
</tr>
<tr>
<td>Medications</td>
<td>Medication names, instructions, dosage, effective date, status, and comments of the medication prescribed at the practice.</td>
</tr>
<tr>
<td>Problems</td>
<td>Names of conditions, effective dates, last related visit, and status of the health condition.</td>
</tr>
<tr>
<td>Procedures</td>
<td>The date and name of the procedure performed at the practice.</td>
</tr>
<tr>
<td>Chart Item</td>
<td>Displays</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Results</td>
<td>Test names, collection date, and lab results.</td>
</tr>
<tr>
<td>Advanced Directives</td>
<td>The advance healthcare directives, results, and effective date recorded at the practice.</td>
</tr>
<tr>
<td>Encounters</td>
<td>Encounter description, name and location of practice, reason for visit, date of visit, name of provider, and providers copied on encounter.</td>
</tr>
<tr>
<td>Family History</td>
<td>The names of the family members along with diagnosis, age at onset, and status of family's medical history.</td>
</tr>
<tr>
<td>Immunizations</td>
<td>Immunization names, date, comments, and status of the immunization ordered at the practice.</td>
</tr>
<tr>
<td>Payers</td>
<td>The name, insurance type, covered party Id, and payer group Id of your health insurance.</td>
</tr>
<tr>
<td>Social History</td>
<td>The type, description, quantity, and date captured of any social habits.</td>
</tr>
<tr>
<td>Vital Signs</td>
<td>The date vital signs were taken, vital signs, and measure results of all vitals recorded at the practice.</td>
</tr>
<tr>
<td>Chief Complaint And Reason for Visit</td>
<td>Chief complaint and the history of present illness</td>
</tr>
<tr>
<td>Reason For Referral</td>
<td>NA</td>
</tr>
<tr>
<td>Plan Of Treatment</td>
<td>The date, type, action, and status of the plan of care recorded at the practice.</td>
</tr>
<tr>
<td>History Of Present Illness</td>
<td>The encounter date, complaint and the history of present illness recorded at practice.</td>
</tr>
<tr>
<td>Functional Status</td>
<td>The functional status recorded at the practice.</td>
</tr>
<tr>
<td>Medications Administered</td>
<td>Medication name, instructions, dosage, effective date and status.</td>
</tr>
<tr>
<td>Instructions</td>
<td>The instructions entered by the providers at the practice.</td>
</tr>
<tr>
<td>Assessments</td>
<td>Type of assessment, description and date.</td>
</tr>
<tr>
<td>Goals</td>
<td>The date, type, action and status recorded for goals.</td>
</tr>
<tr>
<td>Medical Equipment</td>
<td>Description of medical equipment, name of the device, universal device identifier, and start date for any medical equipment used by practice.</td>
</tr>
<tr>
<td>Mental Status</td>
<td>Date and cognitive assessment.</td>
</tr>
<tr>
<td>Health Concerns</td>
<td>Observations, Concerns, status and date of observation.</td>
</tr>
<tr>
<td>General Status</td>
<td>Findings and details.</td>
</tr>
<tr>
<td>Review of Systems</td>
<td>Name of the body system, status (Positive or Negative) and findings.</td>
</tr>
<tr>
<td>Past Medical History</td>
<td>Condition, effective date and outcome.</td>
</tr>
</tbody>
</table>
Save Your Personal Health Records

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

Download Personal Health Records as PDFs

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

1. From My Chart, click View My Chart.
2. Click Download and send my chart.
3. From Chart revision date, select the visit date.
4. Click Download My Data
5. Click Save and select a folder location.
6. Click Save.

Download PHRs as C-CDA (XML) Documents

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

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

**Request Your Personal Health Record**

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

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

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

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

3. From **Chart Date**, select the chart date range from the following options:
   - To request full PHR or consolidated PHR, select **All**.
   - To request PHR for last 30 days, select **Last 30 Days**.
   - To request PHR for last 60 days, select **Last 60 Days**.
   - To request PHR for current year, select **This Year**.
   - To request PHR for previous year, select **Previous Year**.
   - To request PHR between from and to date, select **Custom**.
4. Click **Submit**.
   A message appears notifying you that your Personal Health Record request has been successfully submitted.

**Sending Your PHR**

You can send your PHR to any provider or healthcare entity using their DIRECT address (a DIRECT address is not the same as a regular email address). You can contact your provider for the DIRECT address or perform a search to obtain it. The following links are available for sending PHR:

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

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

**Search for a Provider and Send Your PHR to the Provider**

You can search for the provider and send the PHR.

1. From **Send Chart**, click **I want to search for my provider**.

![Request Personal Health Record](image)

This disclaimer message will be presented to users in Portal's Personal Health Record Module.
2. Search for your provider in any of the following ways:
   - Search by Provider
   - Search by Organization

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

Before You Begin
Ensure that you have the DIRECT address of the provider.

1. From My Chart, click View My Chart.
2. Click Download and send my chart.
3. From Chart revision date, select the date.
4. Click Send.
5. Click I have provider’s direct address.

6. In Provider’s DIRECT Address, enter the provider’s DIRECT address, and then click Send My Chart.
Send Your PHR Using an e-mail Address

1. From **Send Chart**, click **I want to send it to someone else**.

2. Type the following details:
   - Recipient's e-mail addresses
   - Your message
   - Your password and re-type your password
3. Click **Send My Chart**.
   A message appears notifying that your request has been successfully submitted.

**See Who Viewed Your Chart**

You can view activity log such as logged in username, clinical history for, event description, and event date for your NextGen Enterprise Patient Portal account.

1. From **My Chart**, click **View My Chart**.
2. Click **Who has viewed my chart**.
CHAPTER 8

Your Statements

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

Viewing Statements

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

The Statements page displays your or your dependent balances, if any. Also, you can view the following details:

- Last statement. Your last statements
- Statement history. Your statement history
- Online payments. You can view online payment details and you can make online payment from the statement home page, the account balance page, or the view statement page
- Real time account balance. If your practice has opted, real-time account balance allows you to receive your updated statement whenever you make a payment. This allows you to make multiple partial payments, if required.

View Last Statement


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

**View Statement History**


2. Click View Statement History.

3. To view your statement history based on filters, select from the following options:
   • If you are enrolled to more than one practice, select the relevant practice.
• If you are a care manager and you are managing the dependent account, select the relevant patient.
• If you want to view statement for a specific date, select the date.

4. Click View Statement.
5. To return to statement page, click Return to Balances.

**View Online Payments**


2. Click View Online Payments.

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

**Automatic Payment Collection Plan**

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

The Automatic Payment Plan is currently enabled for this account message appears on the Statements page to inform you about the status of APC plan.
Note: If the credit card used for the APC plan is expired or blocked, then you can make payments using the Pay Now feature.

**Opt for an APC Plan**

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

**Making Payments**

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

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

**Make Payments**

2. Click Pay Now.
**Note:** Based on your practice configuration, you can make payment using TSYS-Central, TSYS - Transaction Express, or InstaMed® payment gateway.

3. From **Payment amount**, select one from the following:
   - To pay your total due, click **Pay Total Due**.
   - To pay partial amount, click **Pay Other Amount** and enter the amount.

4. From **Payment Type**, select the preferred payment method from **Credit Card** or **Echeck**.
   - If you have selected **Credit Card**, enter the following information and click **Submit**.
     - Credit Card Number
     - Expiration Date
• If you have selected **Echeck**, type the following information:
  • Routing number
  • Account number
  • Re-type account number
  • Bank account type (Checking or Savings)

* **Note:** The bank routing number is the nine digits number located on the lower left of your check between the |: |: symbols. The bank account number is located to the right of the routing number and can be up to 17 digits long. There is no specific number of characters for a bank account number. Do not include the check number in either the account or routing numbers. Since each practice has its own payment rules, some of the payment methods may not be available.

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

Also, you can also perform any of the following:

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

5. Click **Submit**.
After successfully processing your payment, the system displays your payment receipt, places a copy of the payment in the **Sent Items** folder and sends an email to notify you that your payment was delivered to practice.

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

6. To print the receipt, click **Print this receipt**.
Your Lab Results

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

Viewing Lab Results Details from the Home Page

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

Sorting Lab Results in the Results Section

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

Sorting data on home page

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✋</td>
<td>This is the default icon for each column header. When you click this icon, the information is sorted in ascending order.</td>
</tr>
<tr>
<td>▲</td>
<td>This icon indicates that the information is sorted in ascending order. When you click this icon, the information is sorted in descending order.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>▼</td>
<td>This icon indicates that the information is sorted in descending order. When you click this icon, the information is sorted in ascending order.</td>
</tr>
</tbody>
</table>

**Lab Results Not Available Within My Chart**

The **Lab Results** section on the home page appears differently if aggregation of PHRs fails for a patient. A new section called **Results: Not Available Within My Chart** opens, providing a direct link (View Document) to the PHR document that contains the selected lab results.

The following information appears in **Results: Not Available Within My Chart**:
- Patient Name
- Name of the practice that ordered the tests
- Date the patient received the result on the portal

**View Lab Results Details from My Chart**

The **My Chart** page provides the consolidated information from all PHRs. The **Results** section on the **My Chart** page provides all consolidated lab results.

1. On the NextGen Enterprise Patient Portal home page, click **My Chart**, and then click **View My Chart**.

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

You can view your consolidated lab results details.

**View Lab Results**

You can open a PHR in the Download and Send My PHR page, and then view the results in PDF.
1. On the NextGen Enterprise Patient Portal home page, click **My Chart**, and then click **View My Chart**.
2. On the **My chart** page, click **Download and send my chart**.

![Screen Shot](image1.png)

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

![Screen Shot](image2.png)

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

### View Radiology Results

You can view your radiology results from lab results section on the **My Chart** page. If the practice has sent you images pertaining to your radiology results, you can view these images in the **Inbox** as a document.

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

![Screen Shot](image3.png)

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

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

**Viewing Medications on the Home Page**

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

**Sorting Medications in the Medications Section**

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

**Renew Medications**

NextGen Enterprise Patient Portal provides an easy method of requesting medication renewals. You must allow at least 24 hours to receive a response.

1. On the NextGen Enterprise Patient Portal home page, do one of the following:
   - Click **Renew Medication**.
   - Under **Medications**, click **Refill**.

2. On the **Renew Medications** form, under **Select Your Medical Practice** perform the following tasks:
a. From Practice, select the practice to renew your medication.

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

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

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

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

5. To view inactive medications, select Display any inactive medications that may be available for renewal.
6. Select medication that you want to renew, and then click Select.
7. If you select inactive medications, select Yes, I would like to request the above inactive medication.

![Image]

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

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

![Image]

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

![Image]

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

10. To search all available pharmacies, click Search.

   To locate a pharmacy, enter the search criteria (pharmacy name, address, city, state, or zip code), and then click Search.
If required, click the Map icon next to the pharmacy's phone number to view the location in a new window.

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

15. Click Submit.

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

A message appears notifying you that your medication renewal request has been successfully submitted.
Add a New Pharmacy

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

1. Under Select Pharmacy, click Select different pharmacy.

2. Click Add New.

3. Enter the pharmacy details, and click Save.

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

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

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

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

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

Search for Health Education Topics

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

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

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

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

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

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

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

2. Type your problem, and then click Search.
CHAPTER 12

Settings

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

Account Settings

Account Settings allow you to:

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

Change Username

2. From Username, click Edit.
3. Under **Username**, do the following:
   a. Type your new username.
   b. Re-type your new username.

   ![Account Settings](image)

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

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

**Change Password**

1. On the NextGen Enterprise Patient Portal home page, click **Settings > Account Settings**.
2. From **Password**, click **Edit**.
3. Under the **Password** details, do the following:
   a. Type your new password.
   b. Re-type the new password.
   c. Type your current password.

   ![Password Details]

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

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

**Merge Accounts from Account Settings**

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

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

   ![Account Settings](image)

2. From Merge Accounts, click **Edit**.
3. Select the account that you wish to merge with your current account and click **Next**.
4. Type the username and password for the account you wish to merge with your current account and click **Submit**.

![Merge Accounts](image)

- **Note**: You will get three attempts to provide your credentials of the account you would like to merge with the current account. Unsuccessful attempts will redirect you to your NextGen Enterprise Patient Portal home page. You will get a notification message stating that the accounts cannot be merged and you can reset your account credentials of the account you wish to merge with your current account.
5. Click **Yes** to confirm for merging accounts.
   The **Merge Accounts** section displays that your accounts have been merged. You will also receive an email notification to your verified account email address when you merge your accounts.
Note: The additional practice name will be listed under the Preferred Notification Method section in the Account Settings page and the Practices list in your NextGen Enterprise Patient Portal home page. Now you can access all your medications, messages, medications from your home page.

Change Security Questions

2. From Security Question, click Edit.

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

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

**Change Preferred Notification Method**

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

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

3. Do any one of the following:
   - Click **Delete** next to an existing email address or mobile number.
4. Click **Update**.

**Verify Email Address for Account Settings Notification**

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

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

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

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

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

4. You can set the following options:
• To set the email address as preferred notification method, select **Add it to Preferred Notification Method**.
• To set the email address to receive notification for any updates related to account settings, select **Receive notification at this email address**.

5. Click **Update**.

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

### Cancel your NextGen Enterprise Patient Portal Enrollment

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

![Account Settings](image)

4. Click **Un-enroll**.

![Un-enroll from Patient Portal](image)

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

**Google Authenticator**

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

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

2. Under **Google Authenticator**, click **Edit**.
For more information about Google Authenticator, see the Use Google Authenticator to Secure your Account (on page 15) section.

User Grants

The practice can set up relationships and assign care managers for dependents. As a care manager, you will have full or partial access of another user's account (dependent). If you are a dependent, you can allow another user to have full or partial access to your account. For example, a husband can grant his wife permissions to schedule appointments or a patient can allow his/her mother to renew medications. On NextGen Enterprise Patient Portal, you can view the accounts of your dependents, such as child or a parent.

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

Care manager and dependent relationships can be terminated at any time by the dependent, or the practice. The dependent can terminate the relationship by corresponding with the practice and the practice then terminates, or the dependent can remove all access from the care manager on the site.

Manage Care Manager Grants

If your account has a care manager, you can provide the rights to view or complete selected information (such as appointments and medications) on your behalf. You can also set an expiration date for the rights or remove a care manager from your account.
1. On the NextGen Enterprise Patient Portal home page, click **Settings**, and then select **Manage User Grants**.

![Manage User Grants](image)

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

![Manage User Grants](image)

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

3. To assign Care Manager access to individual modules, perform the following:
   - Clear **Allow full access to my account**.
   - To give view permission, for a particular module, select **View**.
   - To give permission to complete or send a module on Manage User Grants, select **Send/Complete** column next to **Module** name.

4. To set a user grant date for your account:
   - a. Click **Access expires**.
   - b. Click **Calendar** and select the date.

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

5. To remove a care manager from your account:
   - a. Click **Delete**.
A confirmation message appears.

b. Click OK.

Delete Dependent Accounts as a Care Manager

If configured by the practice, a care manager can view, send, or complete selected information, such as appointments and medications, on behalf the patient (dependent).

As a care manager, you can only view information based on the user rights that are provided to you. Only the patient (dependent) or the practice can provide or modify the access rights.

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

3. Click Delete.

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

A confirmation message appears.

4. Click OK.

Manage Practices

You can add additional practices to your NextGen Enterprise Patient Portal account. You can also un-enroll from a practice.
**Enroll in Multiple Practices Within an Enterprise**

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

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

3. Click **Add Selected Practice(s)**. The selected practices are added to your account and you can view your practice on the home page and Manage Practices page.

4. You can perform the following additional actions:
   - Click **Decide Later** to complete enrollment.
   - Click **Decline Pending Enrollment** if you do not want to enroll in a practice. If you decline enrollment the first time, you must request the practice to provide a security token to enroll again.

**Confirm Pending Enrollment Requests**

If you chose to add practices for same enterprises later, you can confirm pending enrollment request.

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

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

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

## Enroll in another Practice

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

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

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

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

   **Note:** If you do not have an email address click **I do not have an email address**, and then enter your last name.
4. Click **Submit**.
   
   A confirmation message appears.
5. Click **OK** to continue.
Un-enroll from NextGen Enterprise Patient Portal

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

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

![Manage your practices]

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

![Manage your practices]

3. From **Reason**, select an applicable reason for un-enrolling from the practice.
4. Click **Un-enroll**.
   A confirmation message appears.
5. Click **OK** to remove your NextGen Enterprise Patient Portal account.

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

**Manage Statement Notifications**

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

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

1. On the NextGen Enterprise Patient Portal home page, click **Settings**, and then select **Statement Notifications**.
2. Perform one of the followings:
   • Select **Receive only electronic statements** to receive only online statements for all practices that provide this service.
   • Clear **Receive only electronic statements** to receive both electronic and paper statements for all practices.

   **Note**: For multiple practices that provide this service and if you want to select different options for each practice, select or clear the corresponding practice as needed.

3. Click **Submit**.
Chapter 13

Troubleshooting

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

- **Locked Accounts (on page 107)**
- **Recover Username (on page 107)**
- **Reset Password (on page 108)**
- **Reset Password with a Reset Token (on page 108)**

Locked Accounts

The portal locks your account after four unsuccessful log on attempts. After your second and third failed attempts to log on, a message appears notifying you that your account will be locked for 20 minutes after 3 unsuccessful attempts.

You cannot access your NextGen Enterprise Patient Portal account once your account is locked. You can click **Forgot username, Forgot password, or I have my password reset token** to recover your logon details from your NextGen Enterprise Patient Portal logon page. Your account will be automatically unlocked after 20 minutes.

If the practice locks your account, you will receive an email stating that you need to contact the practice to unlock your account. During this time, you will not be able to access any mail or perform any tasks. Only the practice can unlock your account. You will receive another email stating that the account has been unlocked.

Viewing Dependent Accounts

If your account is associated with dependent accounts, the user list appears with a list of the persons or dependents whose accounts you manage on the top right. You can select the name of a person or dependent from this list to view their records.

Recover Username

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

1. On the logon page, click **Forgot username**.
2. Type your verified account email address.
3. Click Submit.

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

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

4. Open the email to view your username.

## Reset Password

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

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

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

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

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

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

   The NextGen Enterprise Patient Portal home page opens.

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

## Reset Password with a Reset Token

If you have not provided your email address during enrollment and have not verified your account, you must remember your valid username. To get a password reset token, contact your practice.
1. On the logon page, click **I have my password reset token**.
2. In the **Forgot Password** page, do the following:
   a. Type the token number provided by your practice
   b. Type your username
3. Click **Submit**.

   **Note:** If you have not registered your email address, type your email address, and click **Submit**. If you do not wish to provide email address, select **I do not wish to provide an email address**.
4. On the **Reset Password** page, do the following:
   a. Type your password
   b. Re-type your password
5. Click **Submit**.

   The NextGen Enterprise Patient Portal home page opens.

### Reset Password without a UAE and Security

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

1. On the logon page, click **Forgot Password**.
2. In **Email** or **Username**, type your username or email address.
3. Click **Submit**.
4. On the **Verify your Account** page, enter the following:
   • Username
   • Date of birth in mm/dd/yyyy format
   • Last name
   • First name
   • Home phone number

   **Note:** If home phone number is not available, you can enter any phone number provided during enrollment.
5. Click **Next**.
6. On the **Address Verification** page, select your correct address, and click **Next**.
7. On the **Reset Password** page, do the following:
   • Type your password
   • Re-type your password
8. Click **Submit**.

   The NextGen Enterprise Patient Portal logon page opens. You can log on using the new password.
Chapter 14

NextGen Enterprise Patient Portal Mobile

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

Supported Devices

For the mobile website, mobile devices running on Android™ 4.0 or higher, or Apple iOS 7.1 or higher are supported. A warning message appears, if the device is not compliant with the NextGen Enterprise Patient Portal Mobile’s security policies.

Supported Browsers

For mobile websites, the following browsers are supported:

- Microsoft® Internet Explorer® 11.0 or later
- Apple Safari
- Mozilla Firefox
- Google Chrome browser

System Requirements

To view PDF documents sent from the practice, you need the Adobe® Acrobat® Reader. You can download the latest version of the Adobe Acrobat Reader from the Adobe reader website.

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

Accessing NextGen Enterprise Patient Portal Mobile

The NextGen Enterprise Patient Portal mobile website is accessible, if you are enrolled in the NextGen Enterprise Patient Portal.
You do not have to download any mobile application to access the NextGen Enterprise Patient Portal. On your mobile device, either open your enrollment email and tap the Patient Portal link, or enter the link in your mobile browser to access the NextGen Enterprise Patient Portal mobile site.

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

**NextGen Enterprise Patient Portal Mobile Home Page**

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

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

• Tap the menu at the bottom of the page.

• Tap menu button on the top-left corner, and then tap a menu item.

• Tap back button to return to the previous page.

• Tap left or right to display the previous and next view.

• Tap down or up to expand or collapse a section.

• Tap down or up to expand or collapse a list.

• Tap the compose message button to send an email to the practice.

• Tap the book appointment button to book an appointment with the practice.

• Tap the send chart button to send your PHR.

• Tap the renew medication button to renew your medication.

Download Inbox Items from NextGen Enterprise Patient Portal Mobile

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

• Documents

• Statements

• Medications

• Messages

• Personal Health Records

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

1. Log on to the NextGen Enterprise Patient Portal mobile site. (on page 110)
   The NextGen Enterprise Patient Portal mobile home page opens. For more information, see NextGen Enterprise Patient Portal Mobile Home Page (on page 111).

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

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

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

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

   **Note:** When a download is in progress, the Download Messages button on the filters page is disabled.
### Document Revision History

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