## Document Revision History

<table>
<thead>
<tr>
<th>App Version</th>
<th>Build Number</th>
<th>Date</th>
<th>Document Version</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0</td>
<td>NA</td>
<td>07/10/2014</td>
<td>4.0</td>
<td>Updated the “Sending the PHR” section</td>
</tr>
<tr>
<td>2.0</td>
<td>NA</td>
<td>07/03/2014</td>
<td>3.0</td>
<td>Updated the &quot;Saving Personal Health Records&quot; section</td>
</tr>
<tr>
<td>2.0</td>
<td>NA</td>
<td>06/30/2014</td>
<td>2.0</td>
<td>General Release</td>
</tr>
<tr>
<td>2.0</td>
<td>NA</td>
<td>06/27/2014</td>
<td>1.0</td>
<td>Initial Release</td>
</tr>
</tbody>
</table>
This page is intentionally left blank.
## Contents

### Chapter 1 Introduction  
Overview .......................................................... 9
Web Browser Requirements .................................. 10
Internet Security .................................................. 10
Email Notifications .............................................. 11

### Chapter 2 NextGen Patient Portal Enrollment  
Enrolling in NextGen Patient Portal .................... 13
  Scheduling an Appointment during Enrollment .... 19
Enrolling in NextGen Patient Portal with Token .......... 19

### Chapter 3 NextGen Patient Portal Web Account Access  
Multi-Language Support ..................................... 23
Logging On to your NextGen Patient Portal Account .... 23
Locked Accounts ................................................. 25
Changing the User ............................................... 26
Logging Out of your NextGen Patient Portal Account .... 26
User Name and Password Recovery ....................... 26
  Resetting your Password .................................. 26
  Recovering your User Name ............................ 28
  Resetting Password with Reset Token ............... 30
  Creating a New Password ............................... 31

### Chapter 4 Home Page

### Chapter 5 Mail  
Inbox ............................................................ 37
  Viewing and Replying to Messages .................. 38
  Viewing Documents ....................................... 39
  Viewing Personal Health Records .................... 42
  Submitting a Template ................................... 44
  Submitting an Interactive Medical Form ............. 45
  Deleting Inbox Items .................................... 47
  Printing Inbox Items ..................................... 47
Sent Items ........................................................ 49
  Deleting Sent Items ....................................... 49
Composing Messages ........................................ 50

### Chapter 6 Schedule  
Requesting Appointments .................................. 53
  Creating an Appointment Request .................. 53
  Submitting an Appointment Request ............... 55
Booking an Appointment Online .......................... 56
Accepting a Pending Appointment Request ................................................................. 59
Replying to a Pending Appointment Request ............................................................. 60
Cancelling an Appointment Request .......................................................................... 61
Rescheduling an Appointment .................................................................................... 62
Cancelling an Appointment ......................................................................................... 63
Deleting a Pending Appointment Request ................................................................. 64
My Appointments ........................................................................................................... 64

Chapter 7 My Chart 65
Viewing the Chart .......................................................................................................... 65
Saving Personal Health Records .................................................................................. 67
  Saving PHRs as PDFs .................................................................................................... 67
  Saving PHRs as CCDA Documents .............................................................................. 67
Viewing Audit History .................................................................................................. 68
Sending the PHR ........................................................................................................... 68
Requesting PHRs ........................................................................................................... 69

Chapter 8 Payments 70
Viewing Statements ....................................................................................................... 70
Making Payments .......................................................................................................... 71

Chapter 9 Renew Medications 76
Renewing Medications .................................................................................................. 76
  Selecting your Medical Practice ................................................................................ 76
  Selecting your Medication .......................................................................................... 77
  Selecting your Pharmacy ............................................................................................ 79
  Adding a New Pharmacy ............................................................................................ 80
  Submitting your Request ........................................................................................... 81

Chapter 10 Research ........................................................................................................ 83

Chapter 11 Settings 85
Account Settings ............................................................................................................ 85
  Changing your User Name .......................................................................................... 85
  Changing your Password ............................................................................................ 86
  Changing your Security Question .............................................................................. 87
  Changing your Forgotten Password Question .......................................................... 88
Un-enrolling from the NextGen Patient Portal ............................................................... 89
My Information .............................................................................................................. 90
  Updating your Name and Date of Birth .................................................................... 90
  Managing your Addresses .......................................................................................... 91
  Managing your E-mail Addresses .............................................................................. 93
  Managing your Phone Numbers ................................................................................ 97
Managing User Grants .................................................................................................... 99
Managing Care Manager Accounts ............................................................................. 99
Managing Dependent Accounts ............................................................................... 101
Managing Practices ................................................................. 102
Enrolling to Practices in the same Enterprise ......................... 102
Confirming Pending Enrollment Requests ............................ 102
Enrolling in another Practice ........................................... 103
Un-enrolling from the NextGen Patient Portal ..................... 104
Managing Statement Notifications .................................. 106

Appendix A NextGen Patient Portal Mobile ......................... 109
Supported Devices ........................................................... 109
Supported Browsers .......................................................... 109
System Requirements ..................................................... 110
Accessing NextGen Patient Portal Mobile ......................... 110
NextGen Patient Portal Mobile Home Page ..................... 110
Navigating NextGen Patient Portal Mobile .................. 111

Index ........................................................................ 113
CHAPTER 1

Introduction

This NextGen® Patient Portal Patient User Guide explains how to use the features and functions found on NextGen Patient Portal. NextGen Patient Portal is now available for both desktop and mobile devices.

This guide is intended for patients that are enrolled in NextGen Patient Portal, and assumes readers have a basic understanding of computers, computer terminology and Internet use.

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

Overview

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

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

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

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

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

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

For a list of supported mobile devices and browsers, see Appendix A (on page Error! Bookmark not defined.).

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

**Internet Security**

Here are some suggestions to help protect your privacy and keep your information secure:
Select a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive, must be between six and 20 characters, and can include numbers and special characters.

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

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

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

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

---

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

---

**Email Notifications**

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

Spam blocking software used by email providers such as AOL and NetZero can block legitimate emails. To ensure that you are receiving NextGen Patient Portal emails, add NextMD.com to your contact list, address list, or "Do Not Block" list. If you are using your own spam filtering software, make sure you are not filtering out email from NextMD.com.
This page is intentionally left blank.
CHAPTER 2

**NextGen Patient Portal Enrollment**

The enrollment process is a means of signing up to use the NextGen Patient Portal account which provides access to your personal and medical information on the NextGen Patient Portal website. Based on your practice’s preferences, you can either register yourself or contact the practice to provide and enrollment token.

**Enrolling in NextGen Patient Portal**

You can enroll yourself and create an account for using NextGen Patient Portal using the link on their website, on in some cases, provided in an email. You can obtain one of the following links from the practice based on whether you need to enroll in a single practice or multiple practices:

- **Practice-level registration link**: Only one practice is available during enrollment.
- **Enterprise-level registration link**: Several affiliated practices are available during enrollment.

**Note**: Self-enrollment may not be available at all practices or enterprises. If you do not find this feature on the NextGen Patient Portal website, contact the practice to enroll. For information about enrolling with a token, refer to Enrolling in NextGen Patient Portal with Token (on page 19).
To register in NextGen Patient Portal:

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

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

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

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

4 Enter the requested information.

**Note:** A red asterisk (*) indicates a required field.

5 Click Next.
The *Insurance Information* page displays.

6 Optionally enter one of the following:
   ➤ If you are **self-insured**, select the **I am self-insured** check box.
   ➤ If you have insurance, enter the your **Health Insurance Information** and your **Health Insurance Claim Mailing Address**.

7 Click **Next**.
The Enrollment Credentials page displays.

8 Enter the requested information to:

- Create your username and password
  User names and passwords are case sensitive and must be between six and twenty characters. Passwords must contain at least one number. Use mixed-case letters, numbers and special characters to increase the password strength.
- Create your login security question
- Create password recovery credentials

Note: All fields are required.

9 Enter the text displayed in the CAPTCHA box.
If you cannot read the text, either click the Refresh button to change it or click the Audio button to hear the text. For additional information, click the Help button.

10 Either, click Complete Enrollment or Schedule an Appointment.

For information on scheduling an appointment, refer to the Schedule an Appointment While Registration section (see "Scheduling an Appointment While Registration" on page 18).

If you choose to complete the enrollment, a message that your request has been sent to your practice for approval displays.
Scheduling an Appointment during Enrollment

After providing your enrollment credentials (see "Enrolling in NextGen Patient Portal" on page 13), you can choose to schedule an appointment.

To schedule an appointment during enrollment:
1. On the Enrollment Credentials page, click Schedule an Appointment.
   The Schedule an Appointment page displays.

2. Select the information in the Select Provider and Location section.
   Select the information in the Submit Request section.

   Note: A red asterisk (*) indicates a required field.

3. Click Submit.

Enrolling in NextGen Patient Portal with Token

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

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

**Note:** If you already have a NextGen Patient Portal account in a practice and want to enroll in another practice within the same enterprise, refer to the procedure to enroll in multiple practices (see "Enrolling to Practices in the same Enterprise" on page 102). If you already have a NextGen Patient Portal account for a practice and try to access NextGen Patient Portal website with the reset password link provided by the practice, you will be redirected to the *Password Reset* page (see "Resetting your Password" on page 26).

**To enroll in NextGen Patient Portal:**

1. Open the welcome email sent from the practice, and click the [Click here to go to NextGen Patient Portal](#) link.

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

   **Terms and Conditions**

   

   **PRIVACY POLICY**
   
   Please review our Privacy Policy, which as between you and NextGen Healthcare Information Systems, LLC, its corporate parent Quality Systems, Inc. and their respective subsidiaries and affiliates ("NextGen Healthcare") governs your visit to NextGen® Patient Portal (formerly known as NextMD®), to understand our practices.

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

   ![Terms and Conditions](image)

   1. Accept
   2. Do Not Accept
   3. Print

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

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

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

The *Create enrollment credentials* page displays.

4. Enter the requested information to:
   - **Create your username and password**
     User names and passwords are case sensitive and must be between six and twenty characters. Passwords must contain at least one number. Use mixed-case letters, numbers and special characters to increase the password strength.
Create your login security question
Create your password recovery credentials

**Note:** All fields are required.

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

Your *NextGen Patient Portal Account* page displays.

**Tip:** For easier access next time, add the NextGen Patient Portal website to your Favorites list.
CHAPTER 3

NextGen Patient Portal Web Account Access

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

Multi-Language Support

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

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

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

Logging On to your NextGen Patient Portal Account

To log on to your NextGen Patient Portal account:

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

   ![Login Page Screenshot]

   Note: Web pages on the NextGen Patient Portal may appear differently than depicted.

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

If you do not have and account one, click **Enroll Now** to create one. For more information about enrolling, see "Enrolling in NextGen Patient Portal with Token" on page 19.

**Note:** If you fail to log on to your NextGen Patient Portal account with an incorrect password, the portal locks your account after the fourth try. It automatically unlocks your account after 20 minutes.

The *Answer Your Security Question* page displays.

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

- If you are enrolled to multiple practices in the same enterprise, the *Add new practices* page displays (see "Enrolling to Practices in the same Enterprise" on page 102).
- If a practice in which you are currently enrolled decides to provide you an option to receive only electronic statements, the *Go Paperless!* page displays.

- To receive only electronic statements, click **Go Paperless**. Otherwise click **Decide Later**. You can enable this option later (see "Managing Statement Notifications" on page 106).
Your Home page displays.

![Home Page Screenshot]

Your Home page opens and displays; your account name on the top left. Your Home page contains:
- The most recent mail from your Inbox
- Upcoming appointments
- Reminders
- Recent lab results and medications
- Practice information

**Locked Accounts**

You cannot access your NextGen Patient Portal account:
- If you fail to log on to your NextGen Patient Portal account with an incorrect password, the portal locks your account after the fourth try. It automatically unlocks your account after 20 minutes.
- If the practice locks your account, you will receive an email stating that you need to contact the practice to unlock your account. When the practice unlocks the account, you will receive another email stating that the account has been unlocked. You cannot access any mail or perform any tasks (except for the Research Center) when you log on to your NextGen Patient Portal account and it is locked.
Changing the User

The user list on the top right displays the name of the logged in user. The user list also displays a list of the persons or dependents whose accounts you manage. You can select the name of a person or dependent from this list to view their records.

Logging Out of your NextGen Patient Portal Account

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

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

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

User Name and Password Recovery

You can reset your password using:

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

Resetting your Password

To reset your password using your user name:

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

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

4 Enter your User Name, and click Next.

The Reset your credentials page displays.

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

A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 30).
Recovering your User Name

To reset your password with your demographic information:

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

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

3. Select I'm having problems signing in and then enter the following information:
   > First Name
   > Last Name
   > Email address
   > Date of Birth
   > Zip

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

4. Click Next.

   A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 30).
**Resetting Password with Reset Token**

To reset your password using a reset token:

1. Access the NextGen Patient Portal website.

   The *Login* page displays.

2. Click the **Need help with your user name and password?** link.

   The *Forgot your Login information?* page displays.

3. Select **I have my reset token**.

4. Enter the **Reset token** obtained from the practice.

5. Enter your **Email address**.

6. Click **Next**.

   A message displays notifying you that an email has been sent with a link to reset your password (see "Creating a New Password" on page 30).
Creating a New Password

To create a new password:

1. Open the Password Reset email and click the **Forgot Password** link. The *Reset login credentials* page opens and displays your user name.

   ![Password Reset Page](image)

2. Enter the requested information to:
   - **Reset your password**
     User names and passwords are case sensitive and must be between six and twenty characters. Passwords must contain at least one number. Use mixed-case letters, numbers and special characters to increase the password strength.
   - **Reset your login security question**
   - **Reset your password recovery credentials**

   **Note**: All fields are required.
4 Click **Submit**.
   A message displays indicating that your password has been reset.

5 Click **OK** to continue.
   The *Login* page displays.

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

Inbox
The *Inbox* section displays a list of the latest messages received from your practice.

- Click an item to open it.
- Click **Compose an Email** to compose and send an email to your practice.
- You can also click the *Inbox* tab to view all mail from your practice.

Upcoming Appointments
The *Upcoming Appointments* section displays future appointments booked with your practice.

- Click *Upcoming Appointments* to view all appointments.
- Click an appointment to open it. You can also choose to **Reschedule** or **Cancel** the appointment.
- Click **Schedule an Appointment** to schedule an appointment with your practice.
- You can also click the *Schedule* tab to view your appointments or schedule an appointment.

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

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

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

Medications
The *Medications* section displays the recent medications prescribed by your practice(s).

- Click **Refill** to send a refill request for a medication.
- You can also click the *Medications* tab to renew your medications.

Practice Information
The last section displays the practice information and the welcome message. Click View Profile Page to view the complete details.
Navigation Tabs

The navigation tabs at the top of the page provide access to the following functions:

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Select the Home tab to view your latest messages, upcoming appointments,</td>
</tr>
<tr>
<td></td>
<td>reminders, lab results, recent medications and practice information.</td>
</tr>
<tr>
<td>Mail</td>
<td>Use the commands under the Mail tab to view sent and received messages and</td>
</tr>
<tr>
<td></td>
<td>correspond with your practices.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Use the commands under the Schedule tab to manage and view appointments.</td>
</tr>
<tr>
<td>My Chart</td>
<td>Use the commands under the My Chart tab to view clinical data or request a</td>
</tr>
<tr>
<td></td>
<td>Personal Health Record (PHR) that contains your medical history at that</td>
</tr>
<tr>
<td></td>
<td>practice.</td>
</tr>
<tr>
<td>Payments</td>
<td>Use the Payment tab to view statements and make payments.</td>
</tr>
<tr>
<td>Renew Medications</td>
<td>Select the Renew Medications tab to renew medications</td>
</tr>
<tr>
<td>Research</td>
<td>Select the Research tab to view the Healthwise® Health Information</td>
</tr>
<tr>
<td></td>
<td>Knowledgebase, an online health encyclopedia.</td>
</tr>
<tr>
<td>Settings</td>
<td>Use the commands under the Settings tab to update your personal information,</td>
</tr>
<tr>
<td></td>
<td>manage user grants, practices and statement notifications.</td>
</tr>
</tbody>
</table>
CHAPTER 5

Mail

This chapter explains how to use the Mail page which provides access to your Inbox and Sent Items. It also allows you to compose and send messages.

Inbox

The Inbox displays all incoming items from all practices in which you are enrolled including those of the guardians. Inbox items include incoming messages, documents, templates, PHRs, and interactive forms from your practice.

To access your Inbox:

1. Click the Mail tab and select Inbox.

   Note: You can also access items in your Inbox from your Home page.

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

   ![Inbox screenshot]

2. From your Inbox, you can:

   - Select from the Practice, To, and Type list to filter the items that display in the Inbox.
   - Click column headings to sort the items in ascending or descending order.
   - Select a page number to navigate to other pages.
   - Click an item to open it.
**Viewing and Replying to Messages**

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

**To respond to a message:**

1. Access your **Inbox** (see Inbox page 37).
2. Select **Messages** from the **Type** list.
   - A list of messages display. Unread messages appear in bold text.
3. Click a message to open it.
   - The message opens in a new window.

**Note:** If the provider has marked the message as do-not-reply, you cannot respond.

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

5 To enter a response, click **Reply**.

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

6 Type in your reply and click **Send**.

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

7 Close the window to return to your account.

**Viewing Documents**

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

**To view a document:**

1 Access your **Inbox** (see Inbox page 37).

2 Select **Documents** from the **Types** list.
A list of documents display. Unread documents appear in bold text.

3 Click a document to open.

**Note:** Depending on your computer and Adobe Acrobat Reader settings, you may be prompted to download the file before viewing it. In some cases, Web browser settings or pop-up blocker applications can prevent documents from opening. Refer to the appropriate operating system, Adobe Acrobat Reader, browser or pop-up blocker documentation for more information.

**Note:** If the document has been recalled by the practice staff, a recall message displays instead of the actual contents. Contact your practice for more information.

4 If your document does not display in a timely manner, click the **here** link at the top of the page to download the document.
The comments entered by the practice display under **Document Comments**.
Viewing Personal Health Records

You can view a PHR (Personal Health Records) sent by your practice that contains your chart details from your Inbox. You can also view PHRs from the My Charts tab.

To view a PHR from your Inbox:

1. Access your Inbox (see Inbox page 37).
2. Select Personal Health Record from the Type list.
   
   A list of PHRs display in your Inbox. Unread records appear in bold text.

3. Click a PHR to open it.
   
   The PHR for the most recent visit date displays.

4. Select a visit date on the left to view other PHRs.
5. You can also:
   - Click the Download My Data button to download and save the chart.
   - Click the Who has viewed my chart link to see who has viewed your chart.
   - Click the Send link to send the chart to another provider.
Click the **Go back to my chart** link to view the chart.
Submitting a Template

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

To submit a template:
1. Access your Inbox (see Inbox page 37).
2. Select Templates from the Type list. Unread templates appear in bold text.
3. Click a template to open it.
   The template opens in a new window.
4. Read the instructions and click Next.
The next page of the template displays.

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

**Submitting an Interactive Medical Form**

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

**To submit an interactive medical form:**
1. Access your **Inbox** (see Inbox page 37).
2. Select **Interactive Medical Forms** from the **Type** list.
A list of interactive medical forms displays. Unread form items appear with bold type in the list of interactive medical forms.

3 Click a form to open it.

The form opens in a new window.

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

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

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

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

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

8 Review your answers and either:
   - Click **Start Over** to go back and start from the first question and when prompted to restart, click **OK**.
   - Click **Print** to print out your answers.
Click **Back to Inbox** to return to your Inbox.

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

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

---

**Deleting Inbox Items**

You can delete one or more messages from the Inbox.

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

1  Access your **Inbox** (see Inbox page 37).

2  Either select the check box next to the items you want to delete or select the check box next to the **Delete** button to remove all items.

3  Click **Delete**.

   **Note:** You can also delete a message or an appointment by opening and clicking **Remove**.
   A confirmation message displays.

4  Click **OK** to delete the item.

---

**Printing Inbox Items**

You can print out an item from the Inbox when you open it except PHRs and documents. To print out PHRs and documents, you must save it as a PDF and then print it.

**To print a message:**

1  Access your **Inbox** (see Inbox page 37).

2  Open a message.
   The message details display.

3  Click **Print**.
A new window containing the message details displays followed by the *Print* dialog box.

4 Select the printer and click **Print**.

The message is printed through the selected printer.
Sent Items

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

To access sent items:

1. Click the Mail tab and select Sent Items.

   By default, all sent items for all your practices and the people you manage display. The total number of items appears on the bottom left of the page.

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

Deleting Sent Items

You delete one or multiple messages from the Inbox.

To delete one or more sent item:

1. Click the Mail tab and select Sent Items.

2. Either select the check box next to the items you want to delete or select the check box next to the Delete button to remove all items.

3. Click Delete.

   A confirmation message displays.

4. Click OK to delete the item.
Composing Messages

Use the following procedure to send a message to your practice. To compose a message:

1. Click the Mail tab and select Compose Message.

   The Compose Message form displays.

   ![Compose Message Form](image)

   **Note:** A red asterisk (*) indicates a required field.

2. In Section 1:
   - Select the Practice you want to send the message to.
   - If you are sending the message on behalf of someone other than yourself, select that person from the corresponding list.

3. In Section 2:
   - Select the type of message you are sending from the Category list.
     Categories are specific to each practice and may vary based on your selection.
   - Select the recipient of the message from the To list.
Type the subject of the message in the **Subject** field.

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

4. Click **Submit**.

A message indicating that your message has been successfully sent displays.
This page is intentionally left blank.
This chapter provides information on how to use the **Schedule** tab to schedule and view appointments.

### Requesting Appointments

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

- Submit an appointment request by selecting a preferred date and time and wait for a response from the practice.
- Search for an available appointment schedule date and time and booking it yourself online if available from your practice.

### Creating an Appointment Request

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

**To create an appointment request:**

1. Click the **Schedule** tab and select **Request Appointment**.
   - You can also Schedule an Appointment link from your **Home** page.
   - The **Appointment Request** form displays.

   ![Appointment Request Form](image)

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

3. If you are requesting an appointment from someone other than yourself, select that person from the **Patient** list.
4 Select the following information in **Select Provider and Location** section.

- Provider or group for your appointment.
- Category or type of appointment you want to schedule.
  
  **Note**: Categories are specific to the practice and vary based on the practice settings.
- Office or facility location where you want to schedule the appointment.
  
  When you select a location, the hours of operations display.

**Note**: If the hours of operation do not display, contact your practice.

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

- If required, click the **Map** icon to view the location on a map. The map opens in a new window.

5 Either submit the request and wait for a response (see "Submitting an Appointment Request" on page 55) or book your own appointment (see "Booking an Appointment" on page 56).
Submitting an Appointment Request

When you submit an appointment based on your preferred date and time, you must wait for a response from the practice. You must then reply to the response in order for the practice to schedule your appointment or suggest another time.

Submitting an appointment request does not guarantee an actual appointment with your physician. It must be confirmed by the medical practice before it is considered a booked appointment. Allow at least 24 hours to receive a response.

To submit an appointment request:
1. Create an Appointment Request. (see "Creating an Appointment Request" on page 53)
2. Scroll to the Submit Request section.

3. Enter or select the following information:
   - **Reason for appointment**: Enter the reason for the appointment.
   - **Priority**: Select the level of urgency (Low, Normal or High).
   - **Make appointment for**: Select the time frame for your appointment, such as next week or next month.
   - **Preferred date/time**: Select a time within the hours of operation, and then select a corresponding check box for the day when you would like to schedule the appointment.
   - **Alternate date/time**: If available, select an alternate date and time when you would like to schedule the appointment. You can also select a corresponding check box for the day when you would like to schedule the appointment.

4. 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.
5 Open the request response to see if the appointment was booked or is pending (see "Accepting a Pending Appointment Request" on page 63).

6 If the suggested time is not suitable, you need to either cancel (see "Cancelling a Booked Appointment" on page 62) or reschedule (see "Rescheduling a Booked Appointment" on page 58) the appointment and then create a new request.

**Booking an Appointment Online**

Based on your practice’s portal settings, you can have the ability to book an appointment online.

To book an appointment:

1. Create an Appointment Request. (see "Creating an Appointment Request" on page 53)
2. Scroll to the **Search Appointment** section.

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

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

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.

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

7 If required, you can click the corresponding links to **Make another appointment** or **Print for your records**.
Accepting a Pending Appointment Request

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

To accept a pending appointment request:

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

   ![Appointment Request Details]

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

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

To send a reply from a pending appointment request:

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

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

3. Enter the reason to change the appointment.

4. Click Send.
   
   A message that your appointment response has been successfully submitted displays.
Cancelling an Appointment Request

You can cancel a pending appointment request.

To cancel a pending appointment request:
1. Open the pending appointment from the **Inbox**.
   The **Appointment Request** details display.

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

3. Click **OK**.
   The pending appointment request is canceled.
Rescheduling an Appointment

You can reschedule a booked appointment before the appointment date.

To reschedule a booked appointment:

1. Click the My Appointments link and open a booked appointment.
   The Appointment Detail form displays.

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

   A list of reasons to reschedule displays.

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

3. Select a Reason and click Submit.
   The My Appointment page opens. The selected appointment's status is now set to Cancelled.

4. You can now start a new appointment request (see "Creating an Appointment Request" on page 53).
Cancelling an Appointment

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

To cancel an appointment:

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

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

   A list of reasons to cancel displays.

   **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.

3. Select a Reason and click Submit.
   
   The My Appointment page opens. The selected appointment's status is now set to Cancelled.
Deleting a Pending Appointment Request

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

To remove a pending appointment request:

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

2. Click Remove.
   A confirmation message displays.

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

My Appointments

The My Appointments page displays a list of all the booked and cancelled appointments. You access the My Appointments page from the Mail tab or by clicking Upcoming Appointments on the Home page. You can open and print (see "Printing Inbox Items" on page 47), cancel (see "Cancelling a Booked Appointment" on page 62), reschedule (see "Rescheduling a Booked Appointment" on page 58), or delete (see "Deleting Inbox Items" on page 47) appointments.
CHAPTER 7

My Chart

Use the commands under the My Chart tab to view clinical data or request a Personal Health Record (PHR) that contains your medical history at a practice

Viewing the Chart

You can view your chart from the My Chart tab.

To view the chart:
1. On the My Chart menu, click View My Chart.

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

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

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

3 Click the Download and send my chart link to save your chart as a PDF.
Saving Personal Health Records

A Patient Health Record (PHR) is a document that contains information from your chart and 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 CCDA document.

Saving PHRs as PDFs

Use the following procedure download and save your PHR as a PDF. To view the file, you must have Adobe® Acrobat® Reader installed to open and view the file.

To save a PHR as a PDF:
1. Open your chart (see "Viewing the Chart" on page 65).
2. Click the Download and send my chart link.
3. Select your Visit Date on the left.
   The PHR details display.
4. Click the Download My Data button.
   The File Download dialog box displays.
5. Click Save to save the file.
6. Select a location and click Save.

Saving PHRs as CCDA Documents

A CCDA (Consolidated Clinical Document Architecture) document is similar to a PHR, but uses a healthcare industry standard to organize information and 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.

To save the personal health record as XML:
1. Open your chart (see "Viewing the Chart" on page 65).
2. Click the Download and send my chart link.
3. Select your Visit Date on the left.
   The PHR details display.
4. Click the Save CCDA button.
The *File Download* dialog box displays.

5. Click **Save**.
6. Select a location and click **Save**.

## Viewing Audit History

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

**To view the audit history:**

1. Open the chart (see "Viewing the Chart" on page 65).
2. Click the **Who has viewed my chart** link.

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

   ![Audit History Table](image)

## Sending the PHR

You can send your PHR to any provider or healthcare entity using their direct address (which is similar but not the same as a standard email address). You can contact them for the direct address or perform a search to obtain it.

**To send a PHR:**

1. Open the chart (see "Viewing the Chart" on page 65).
2. Click the **Download and send my chart** link to view the details in the PDF format.

   The PHR for the selected visit displays.
3. Click the **Send** link.

   The **Send Chart** page displays.
4 If you know the direct address, enter it in the **Provider's direct address** text box, and click **Send My Chart**.

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

A list of results display.

5 Select a result and send the PHR.

### Requesting PHRs

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

To request a PHR:

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

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

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

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

4 Click **Submit**.

   A message that your request has been successfully submitted displays. When the health record is sent to you, it shows up as a new item in your Inbox.
If enabled by your practice and you have opted to receive electronic statement, you can receive statements and make payments.

**Viewing Statements**

To view statements:

1. Select the **Payments** tab or open a statement from your Inbox.
   A list of your statements display.

2. To view a statement for a particular date, click the corresponding **click to view this statement** link.

3. To print the statement, click **Print**

4. To return to the statement list, click **Close**.
5 If your practice accepts electronic payments, click **Make a Payment** (see "Making Payments" on page 71).

### Making Payments

You can pay statements that you receive from your practice online through NextGen Patient Portal. Provided that practice has enabled the portal to accept online payments.

**To make payments:**

1. Select the **Payments** tab or open a statement from your Inbox.
   
   Your latest statement summaries display.

2. Click **Make a Payment**.
The *Make a Payment* form displays.

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

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

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

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

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

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

6 Select either Pay Total Due or Pay Other Amount
   When choosing Pay Other Amount, enter the payment amount. All amounts are in US dollars.

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

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

![Payment Submitted]

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

9. To print your payment receipt, click the **Print this receipt** link.
Renew Medications

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

Renewing Medications

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

To access medications for renewal:
Select Renew Medication from the Medications tab or click the Refill link for a medication listed on your Home page.

The Renew Medications form displays.

Selecting your Medical Practice

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

To select your medical practice:

1 On the Renew Medications form, scroll to the Select Your Medical Practice section.

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

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

4 You can now select your medications (see "Selecting your Medication" on page 77).
Selecting your Medication

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

**To select your medication:**

1. After selecting your practice (see "Selecting your Medical Practice" on page 76), scroll to the **Select Medications** section.
   
   A list of medications available for renewal display.

2. If no medications are listed, or you want to select another medication, click the **Select different medications** link.
   
   A list of alternative medications display.
3 Select the **Display any inactive medications that may be available for renewal** check box to view inactive medications.

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

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

5 Click **Select**.

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

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

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

8 You can now select your pharmacy (see "Selecting your Pharmacy" on page 78).
Selecting your Pharmacy

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

To select a pharmacy:
1. After selecting your medication, scroll to the Select Pharmacy section.
   Your preferred pharmacy displays.

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

3. Enter the search criteria (pharmacy name, address, city, state, or zip code) to locate a pharmacy and click Search.
   To return a list of all available pharmacies, leave the Pharmacy search field blank and click Search.
   The top 100 pharmacies that meet the search criteria display.

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

5 Click the pharmacy's name to select it.

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

7 Click Select.

8 You can now submit your renewal request (see "Submitting your Request" on page 81).

Adding a New Pharmacy

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

To add a new pharmacy:

1 In the Select Pharmacy section, click the Select different pharmacy link.

A search form displays.

2 Click Add New.

The Add New Pharmacy form displays.

3 Enter the pharmacy details and click Save.

Note: A red asterisk next to a field name indicates a required entry.
The pharmacy that was just added displays at the top of the list. A Modify Pharmacy icon displays before the pharmacy’s name.

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

**Submitting your Request**

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

**To submit the renewal request:**

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

2. Click **Submit** to complete the process.
   A message that your medication renewal request has been successfully submitted displays.
Note: If the Yes, I would like to request the above inactive medication check box is not selected when renewing inactive medications, the following warning message displays when you click Submit.

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

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

To access the Healthwise Knowledgebase:

1. Click the Research tab.
   The Healthwise Knowledgebase Home page displays.

2. From this page you can:
   - **Perform a Search:** The search function enables you to research health topics. If you received a Healthwise Patient Instruction handout at the office, you can enter the code number at the bottom of the page in the Search field to view that topic or other related topics.
     While the Patient Instruction handout covers high level topics and provides clear instructions (such as "What to do after your visit for Heart Disease"), the Knowledgebase provides additional detail about the condition and covers other relevant topics to educate you.
   - **Use Interactive Tools:** The interactive tools in the Healthwise Knowledgebase provide you with tailored health information just by answering a few questions about your health. You can assess your risk for a heart attack, learn what contributes to stress, or even calculate the calories you burn during a particular activity. Links to these interactive tools appear
throughout relevant topics and in the Health Tools section of topics.

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

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

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

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

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

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

Information from this website does not replace the advice of a doctor. Healthwise disclaims any warranty or liability for your use of this information. Your use of this information means that you agree to the Terms of Use. Healthwise is a Utilization Review Accreditation Commission (URAC) accredited health website content provider. How this information was developed (https://www.healthwise.net/nextgen/Content/StdDocument.aspx?DOCHWID=support-abouthw#support-abouthw-editorial) to help you make better health decisions.
Chapter 11

Settings

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

Account Settings

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

Changing your User Name

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

To change your user name:
1. Click the Settings tab and select Account Settings.
   The Account Settings page displays.

2. In the User Name section, click the Edit link.
The User Name section expands.

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

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

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

**Changing your Password**

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

**To change your password:**

1. Click the **Settings** tab and select **Account Settings**.
   
   The **Account Settings** page displays.

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

---

Confidential – Proprietary Information – For Use By Authorized NextGen Healthcare Clients Only. Do Not Distribute 07/11/2014
The Password section expands.

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

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

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

**Changing your Security Question**

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

**To change your security question:**

1 Click the **Settings** tab and select **Account Settings**.
   The **Account Settings** page displays.

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

3 Select a new question from the list.
4 Enter and confirm your new answer in the fields provided.
   
   **Note:** All fields are required.

5 Enter your current password in the field provided.
6 Click Submit.

A message that your security question has been updated displays.

**Changing your Forgotten Password Question**

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

To change your forgotten password question:

1 Click the Settings tab and select Account Settings.
   
   The Account Settings page displays.

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

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

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

5 Click **Submit**.

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

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

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

To un-enroll from the NextGen Patient Portal:

1 Click the **Settings** tab and select **Account Settings**.

   The **Account Settings** page displays.

2 In the **Un-enroll from Patient Portal** section, click the **Delete your Patient Portal account** link.
A form to un-enroll from NextGen Patient Portal displays.

1. Select the **Reason** from the corresponding list.
2. Click **Un-enroll**.
   
   A confirmation message displays.

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

**My Information**

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

**Updating your Name and Date of Birth**

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

**Note:** The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.
To update your name and date of birth:

1. Click the Settings tab and select My Information.
   Information about your account displays.

   ![My Information](image)

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

   ![My Information](image)

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

Managing your Addresses

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

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

1. Click the Settings tab and select My Information. Information about your account displays.
2. Scroll down to the Addresses section.
3. To add a new address:
   > Click the Add link. A blank address form displays.
   > Enter the requested information (field names with red asterisks are required).
   > Click Add. A message that your address has been added displays.
4. To update an address:
   > Click the Edit link next to the address you want to change.
Information about the selected address displays.

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

Click Update.

A message that your address has been updated displays.

5 To delete a mailing address:

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

Information about the selected address displays.

Click Delete.

A confirmation message displays.

Click OK.

A message that your address has been deleted displays.

Managing your E-mail Addresses

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

Note: The information listed here is used by the NextGen Patient Portal only. The changes are not sent to the practice.
To manage your e-mail addresses:

1. Click the **Settings** tab and select **My Information**.
   The information about your account displays.

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

3. To add another e-mail address:
   - Click the **Add** link.
     A blank e-mail address form displays.
     
     > Enter the new **E-mail address** in the field provided.

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

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

- **E-mail HTML**: Displays text formatting, bullets, numbers, pictures, etc.
- **E-mail Text**: Displays only un-formatted text
- **Text Message**: Displays abbreviated messages (approximately 200 characters) for mobile devices.

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

**Click Add.**

A message that your e-mail has been added.

#### To update an e-mail address:

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

  Information about the selected e-mail displays.

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

  **Click Update.**

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

#### To delete an e-mail address:

---

**Table**

<table>
<thead>
<tr>
<th>Name</th>
<th>Gateway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unicel</td>
<td>@utext.com</td>
</tr>
<tr>
<td>USA Mobility</td>
<td>@usamobility.net</td>
</tr>
<tr>
<td>Verizon</td>
<td>@vtext.com</td>
</tr>
<tr>
<td>Virgin Mobile (Canada)</td>
<td>@vmobile.ca</td>
</tr>
<tr>
<td>Virgin Mobile (USA)</td>
<td>@vmobl.com</td>
</tr>
</tbody>
</table>

---
Click the Edit link next to the e-mail you want to change.
Information about the selected e-mail displays

Click Delete.
A confirmation message displays.

Click OK.

**Managing your Phone Numbers**

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

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

**To manage your phone numbers:**

1. Click the Settings tab and select My Information.
   Information about your account displays.

2. Scroll to the Phone section.

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

![Phone Number Form](image)

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

Click **Add**.

A message that your phone number has been added displays.

4 To update a phone number:

   - Click the **Edit** link next to the phone number you want to change.
   
   Information about the selected phone number displays.

   ![Edit Link](image)

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

   Click **Update**.

   A message that your phone number has been updated displays.

5 To delete a phone number:

   - Click the **Edit** link next to the phone number you want to change.
The information about the selected phone displays.

Press **Delete**.

A confirmation message displays.

A message that your phone number has been deleted displays.

---

**Managing User Grants**

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

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

**Managing Care Manager Accounts**

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

**To manage people managing your account:**

1. Click the **Settings** tab and select **Manage User Grants**.

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

![Manage User Grants](image)

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

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

4 To set an expiration date when the selected person can no longer manage your account:
   - Click the button next to "Access expires."
   - Click the **Calendar** icon to select the date.

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

5 To remove a care manager from your account:

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

   A confirmation message displays.
   - Click **OK**.
Managing Dependent Accounts

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

To remove a dependent from your account:

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

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

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

   A confirmation message displays.

4. Click OK.
Managing Practices

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

Enrolling to Practices in the same Enterprise

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

To enroll to practices in the same enterprise:

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

   The Add new practices page displays if your practice has enrolled you to NextGen Patient Portal in the same enterprise.

2. Select the check box provided for the practice name.

   Note: Select the Add Practice check box to select all practices.

3. Click Add Selected Practice(s).

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

   You can perform the following additional actions:

   › Click Decide Later to complete enrollment at a later point in time.

   › Click Decline Pending Enrollment if you do not want to enroll to a practice(s).

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

Confirming Pending Enrollment Requests

This procedure will help you to enroll to a practice from the Manage your practices page.
To confirm pending enrollment requests:

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

2. In the My Account tab or navigation pane, click the Manage Practices link.
   The pending enrollments display.

3. Click the Add this practice to my account link for the practice.
   The buttons to complete or decline enrollment display.

4. Click Complete Enrollment.
   The enrolled practice displays in the currently enrolled practices list and on the Home page.

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

Enrolling in another Practice

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

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

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

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

2. In the **My Account** tab or navigation pane, click the **Manage Practices** link.
   An enrollment form displays and list the practices where you are currently enrolled.

   ![Manage Practices](image)

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

4. Click **Submit**.
   A confirmation message displays if you are enrolled.

5. Click **OK** to continue.
   The added practice appears on the Enter new practice enrollment information form.

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

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

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

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

   **Note:** You can also un-enroll from the **Account Settings** (see "Un-enrolling from the NextGen Patient Portal" on page 89) tab.
An enrollment form displays and list the practices where you are currently enrolled.

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

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

3 Select the **Reason** you are un-enrolling from the corresponding list.
4 Click the **Un-enroll** button.
   A confirmation message displays.
5 Click **OK** to delete your NextGen Patient Portal account.

**Managing Statement Notifications**

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

**To manage your statement notifications:**

1 Click the **Settings** tab and select **Statement Notifications**.
   The **Go Paperless!** page displays.

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

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

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

3 Click **Submit**.
Appendix A

NextGen Patient Portal Mobile

The NextGen Patient Portal mobile site is similar in functionality and provides most features that are available on the NextGen Patient Portal full site.

Supported Devices

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

Supported Browsers

For mobile websites, the following browsers are supported:

› Microsoft® Internet Explorer® 9 and 10
› Android
› Apple Safari®
› Mozilla® Firefox®
› Google® Chrome™

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

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

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

Accessing NextGen Patient Portal Mobile

You can access NextGen Patient Portal Mobile if you are enrolled in the NextGen Patient Portal Website.

There is no special mobile app that you need to download. On your mobile device, either open your enrollment email and click the Patient Portal link, or enter the link in your mobile browser to access the NextGen Patient Portal mobile site.

You can also click a link at the bottom of the Log In page on the full site to take you to the mobile site and vice versa.

NextGen Patient Portal Mobile Home Page

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

› Medications and Lab Results do not display
› A calendar displays. Click a date in the calendar to view the appointments for the day.
Navigating NextGen Patient Portal Mobile

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

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

## A
- Accepting a Pending Appointment Request • 61
- Account Settings • 87

## B
- Booking an Appointment • 58

## C
- Cancelling a Booked Appointment • 65
- Cancelling an Appointment Request • 63
- Changing Your Forgotten Password Question • 90
- Changing Your Password • 88
- Changing Your Security Question • 89
- Changing Your User Name • 87
- Composing Messages • 52
- Confirming Pending Enrollment Requests • 104
- Creating a New Password • 33

## D
- Deleting a Pending Appointment Request • 66
- Deleting Inbox Items • 49
- Deleting Sent Items • 51
- Document Revision History • 3

## E
- Email Notifications • 13
- Enrolling in Another Practice • 105
- Enrolling in NextGen Patient Portal • 15
- Enrolling in NextGen Patient Portal with Token • 21
- Enrolling to Practices in the same Enterprise • 104

## H
- Home Page • 35

## I
- Inbox • 39
- Internet Security • 12
- Introduction • 11

## L
- Locked Accounts • 27
- Logging On to Your NextGen Patient Portal Account • 25
- Logging Out of Your NextGen Patient Portal Account • 28

## M
- Mail • 39
- Making Payments • 73
- Managing Care Manager Accounts • 101
- Managing Dependent Accounts • 103
- Managing Practices • 104
- Managing Statement Notifications • 108
- Managing User Grants • 101
- Managing Your Addresses • 93
- Managing Your E-mail Addresses • 95
- Managing Your Phone Numbers • 99
- My Account • 87
- My Information • 92

## N
- Navigating NextGen Patient Portal Mobile • 113
- NextGen Patient Portal Enrollment • 15
- NextGen Patient Portal Mobile • 111
- NextGen Patient Portal Mobile Home Page • 112
- NextGen Patient Portal Web Account Access • 25

## O
- Overview • 11

## P
- Printing a Message • 49

## R
- Recovering Your User Name • 30
- Renewing Medications • 78
- Replying to Messages • 40
- Requesting Personal Health Records • 71
Index

Rescheduling a Booked Appointment • 64
Research Center • 85
Resetting Password with Reset Token • 32
Resetting Your Password • 28

W
Web Browser Requirements • 12

S
Saving Personal Health Records • 69
Saving PHRs as CCDA Documents • 69
Saving PHRs as PDF • 69
Scheduling an Appointment during Enrollment • 21
Selecting Your Medical Practice • 78
Selecting Your Medication • 79
Selecting Your Pharmacy • 81
Sending a New Appointment Request from Pending Requests • 62
Sent Items • 51
Starting an Appointment Request • 55
Submitting a Template • 46
Submitting an Appointment Request • 57
Submitting an Interactive Medical Form • 47
Submitting Your Request • 83
Supported Browsers
   NextGen Patient Portal Mobile • 111

Supported Devices
   NextGen Patient Portal Mobile • 111

System Requirements
   NextGen Patient Portal Mobile • 112

T
Tasks • 55

U
Un-enrolling from the NextGen Patient Portal • 91, 106
Updating Your Name and Date of Birth • 92
User Name and Password Recovery • 28

V
Viewing Audit History • 70
Viewing Documents • 41
Viewing Personal Health Records • 44
Viewing Statements • 72