



# User Guide

for NextGen<sup>®</sup> PxP Portal, 21.5.2

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## CHAPTER 1

# NextGen PxP Portal Features

NextGen<sup>®</sup> PxP Portal is a fast, reliable, and easy-to-use platform where patients can view health information anytime. It is a convenient, safe, and secured environment through which patient can communicate with you.

NextGen PxP Portal enables patient to do the following:

- Manage messages
- Submit a question to you
- Request for an appointment
- Schedule an appointment
- Request for prescription renewal
- Pay bills
- Access health forms
- Access health records

## Web Browser Requirements

NextGen PxP Portal works best with the following browsers.

- Microsoft Edge
- Mozilla<sup>®</sup> Firefox<sup>®</sup> (latest 2 versions)
- Google Chrome<sup>™</sup> (latest 2 versions)
- Apple Safari<sup>®</sup> (latest 2 versions)
- Mobile Apple Safari (IOS)
- Mobile Google Chrome (Android)

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

## CHAPTER 2

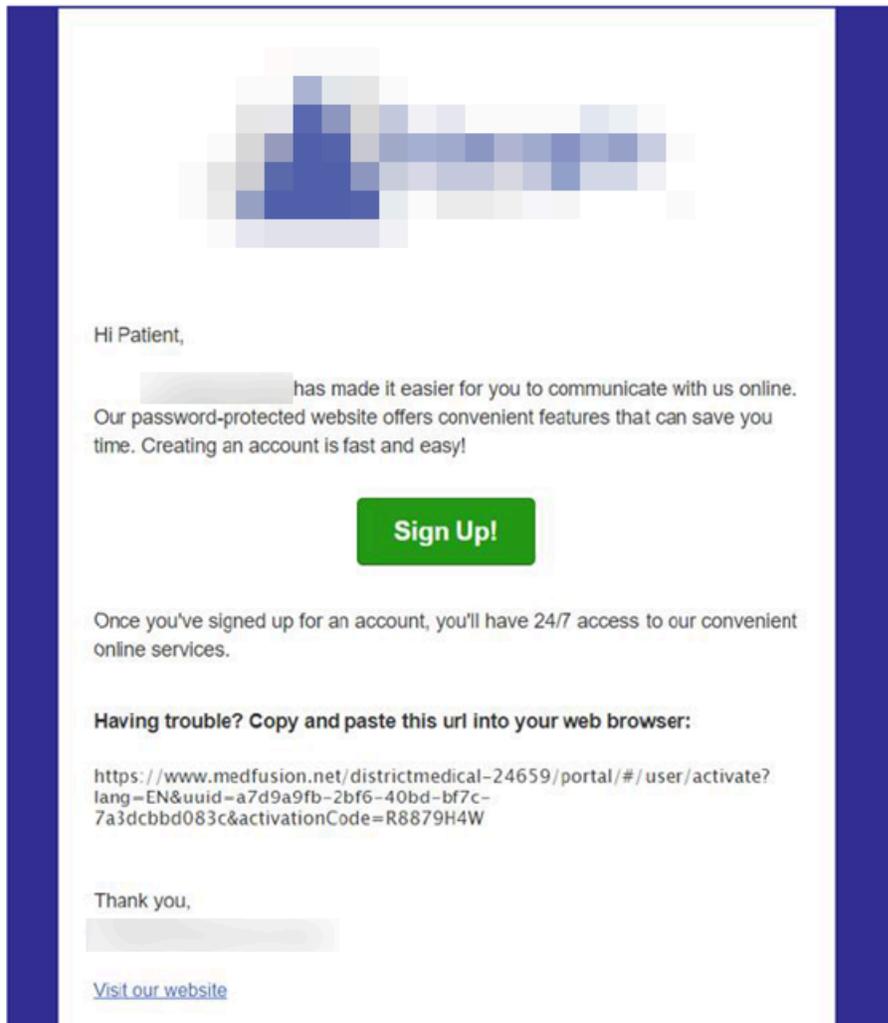
# *Activating NextGen PxP Portal Account*

When a patient visits your practice, you must create an account for the patient in NextGen<sup>®</sup> Enterprise EHR or NextGen<sup>®</sup> Enterprise PM, and send the enrollment invitation to the patient's registered email address. The patient must activate their NextGen PxP Portal account to access their health records and communicate with you through the platform.

## *Activate NextGen PxP Portal Account*

A patient can activate the NextGen PxP Portal account by clicking **Sign Up!** in the enrollment invitation email sent by the Practice.

1. Open the enrollment invitation email.



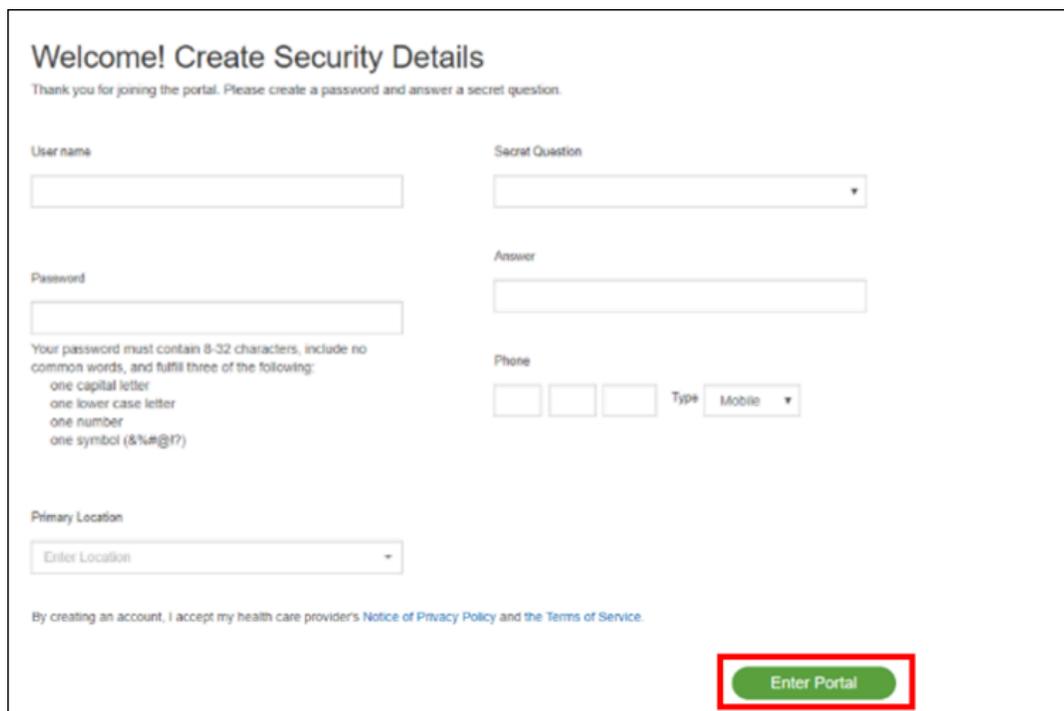
2. Do one of the following:

- Click **Sign Up!**
- Copy the URL in the email and paste it in your web browser.

A verification page opens.



3. Enter the zip code and date of birth.
4. Click **Continue**.  
The **Welcome! Create Security Details** page opens.



5. To set up the account security details, do the following:
  - a. Type the desired user name.  
The user name must be unique and can contain 6-256 characters. It can be a combination of alpha numeric and special characters (without any space). The user name is not case sensitive.
  - b. Type the desired password.  
The patient must choose a password that is easy to remember, but difficult for others to guess. The password can contain 8-32 characters, but should not include common words. The password should have at least three of the following:

- One uppercase letter (A-Z)
  - One lower case letter (a-z)
  - One digit (0-9)
  - One special character (&%#@!?)
- c. Select a security question and type the answer for the security question.
-  **Note:** The selected security question is used for account verification while resetting the password.
- d. Enter the phone number, and select the phone type.
- e. From the **Primary Location** list, select patient's location.
6. Click **Enter Portal**.
- The NextGen PxP Portal account is activated and the NextGen PxP Portal home page opens.

## CHAPTER 3

# Create Patient Account in NextGen PxP Portal

Patients can create an account in NextGen PxP Portal to access their health records and communicate with you.

1. On the NextGen PxP Portal logon page, click **Create new account**.  
The **Patient Information** page opens.

**Patient Information**  
Please enter the patient's information to create a secure account.

Patient first name:

Last name:

Email address:

Gender:  Female  Male

Date of birth:  /  /

Address:

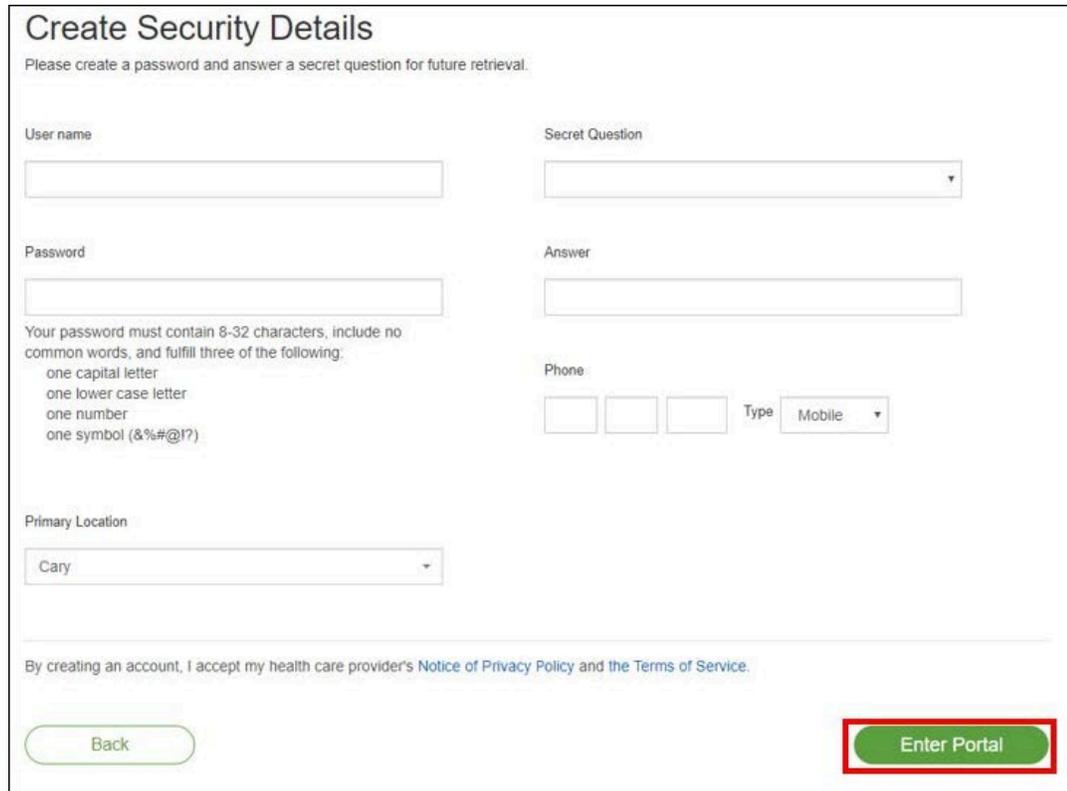
Address (second line):

City:

State:  ZIP code:

Date of birth:  /  /

2. Enter the patient details and click **Next**.  
The **Create Security Details** page opens.



**Create Security Details**

Please create a password and answer a secret question for future retrieval.

User name

Secret Question

Password

Answer

Your password must contain 8-32 characters, include no common words, and fulfill three of the following:

- one capital letter
- one lower case letter
- one number
- one symbol (&%#@!?)

Phone    Type

Primary Location

By creating an account, I accept my health care provider's [Notice of Privacy Policy](#) and the [Terms of Service](#).

3. To set up the account security details, do the following:

a. Type the desired user name.

The user name must be unique and can contain 6-256 characters. It can be a combination of alpha numeric and special characters (without any space). The user name is not case sensitive.

b. Type the desired password.

The patient must choose a password that is easy to remember, but difficult for others to guess. The password can contain 8-32 characters, but should not include common words. The password should have at least three of the following:

- One uppercase letter (A-Z)
- One lower case letter (a-z)
- One digit (0-9)
- One special character (&%#@!?)

c. Select a security question and type the answer for the security question.

 **Note:** The selected security question is used for account verification while resetting the password.

d. Enter the phone number, and select the phone type.

e. From the **Primary Location** list, select patient's location.

4. Click **Enter Portal**.

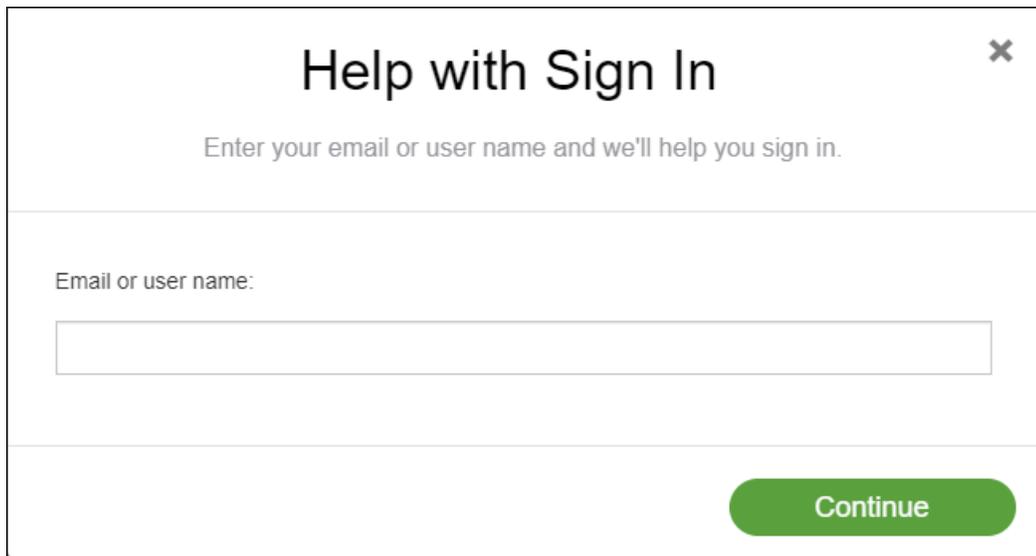
The NextGen PxP Portal account is created and the NextGen PxP Portal home page opens.

## CHAPTER 4

# Reset Password

A patient can reset their NextGen PxP Portal password.

1. On the NextGen PxP Portal logon page, click **I forgot my user name and/or password**.  
The **Help with Sign In** page opens.



Help with Sign In

Enter your email or user name and we'll help you sign in.

Email or user name:

Continue

2. Type the email address or user name, and then click **Continue**.  
The patient receives an email containing the user name and a button to reset the password.



We understand that you need help signing in.

Your user name is **27609NC**. If you know your password, you can [Sign In](#) now.

If not, you can sign in once you've reset your password.

[Reset Password Now](#)

Thank you,

3. Click **Reset Password Now**.  
The **Help with Sign In** page opens.

Help with Sign In

Hello, Jessicascott

Your user name is: **27609NC**  
If you know your password, you can [Sign In Now.](#)

In order to reset your password, please answer your security question.

What was the name of your first pet?

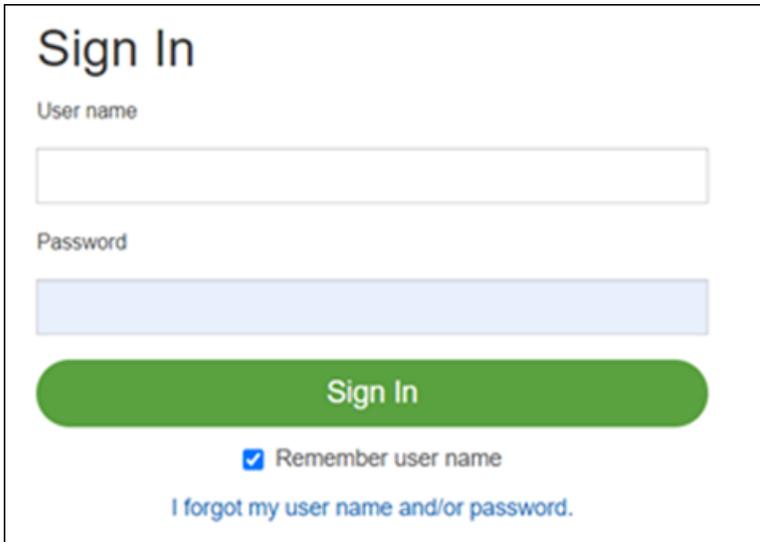
4. Type the answer to the security question selected during account activation.
5. Click **Continue to Reset Password**.  
The **Reset your Password** page opens.
6. Type a new password in the **New password** and **Confirm password** fields.  
The password must be easy to remember, but difficult for others to guess. The password can contain 8-32 characters, include no common words, and have at least three of the following:
  - One upper case letter (A-Z)
  - One lower case letter (a-z)
  - One digit (0-9)
  - One special character (&%#@!?)
7. Click **Save and Enter Portal**.  
The patient's password is reset.

## CHAPTER 5

# Retrieve Username

A patient can retrieve their NextGen PxP Portal user name.

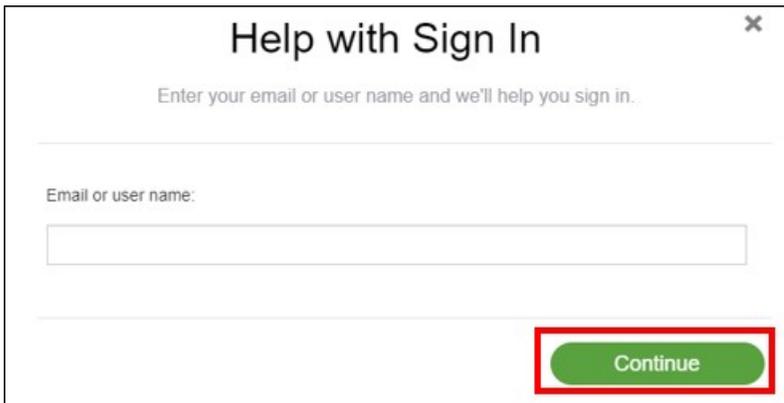
1. On the NextGen PxP Portal logon page click **I forgot my user name and/or password.**



The screenshot shows the 'Sign In' page. At the top is the title 'Sign In'. Below it are two input fields: 'User name' and 'Password'. The 'Password' field is currently filled with a light blue color. Below the input fields is a green 'Sign In' button. Underneath the button is a checked checkbox labeled 'Remember user name'. At the bottom of the form is a blue link that says 'I forgot my user name and/or password.'

The **Help with Sign in** page opens.

2. Type the patient's email address and click **Continue.**



The screenshot shows the 'Help with Sign In' page. At the top is the title 'Help with Sign In' and a close button (X). Below the title is the instruction 'Enter your email or user name and we'll help you sign in.' There is a single input field labeled 'Email or user name:'. At the bottom right of the form is a green 'Continue' button, which is highlighted with a red rectangular border.

An email with the patient's username is sent to the patient's email address, and the patient receives a message confirming that the email has been delivered successfully.

The patient can retrieve the NextGen PxP Portal user name from the email.

## CHAPTER 6

# Configuring Patient Accounts

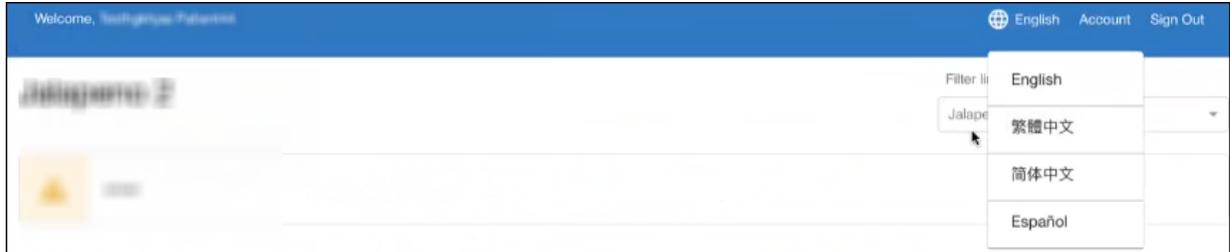
Patients can configure the following in their NextGen PxP Portal accounts.

- Language
- Profile
- Security Settings
- Preferences
- Account Activity

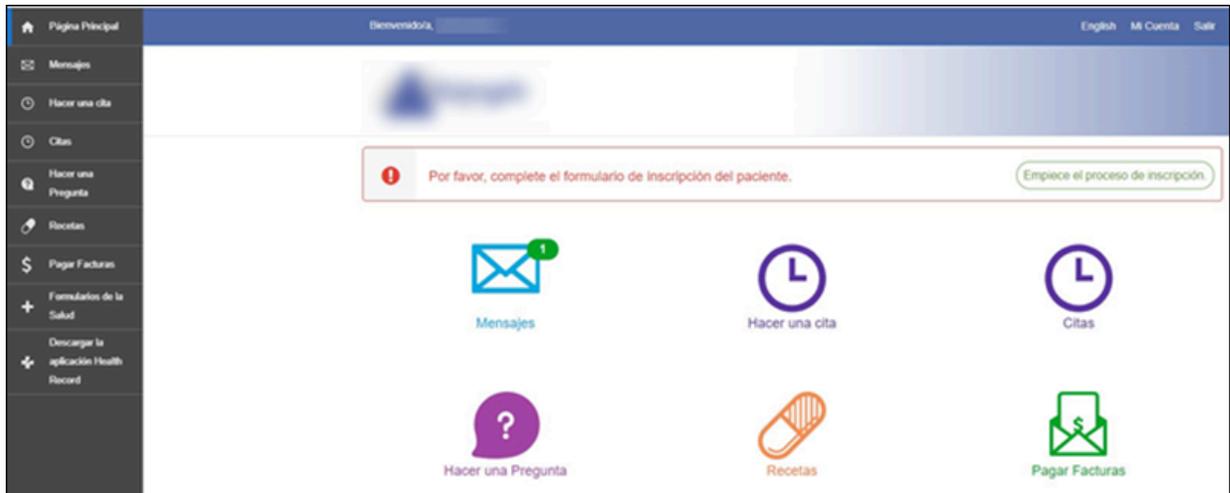
## Configure Language

Patients can view their NextGen PxP Portal account in their preferred language. Currently, English, Spanish, Chinese Simplified and Chinese Traditional are available.

1. Open NextGen PxP Portal.
2. In the upper-right corner of the home page, select the preferred language.



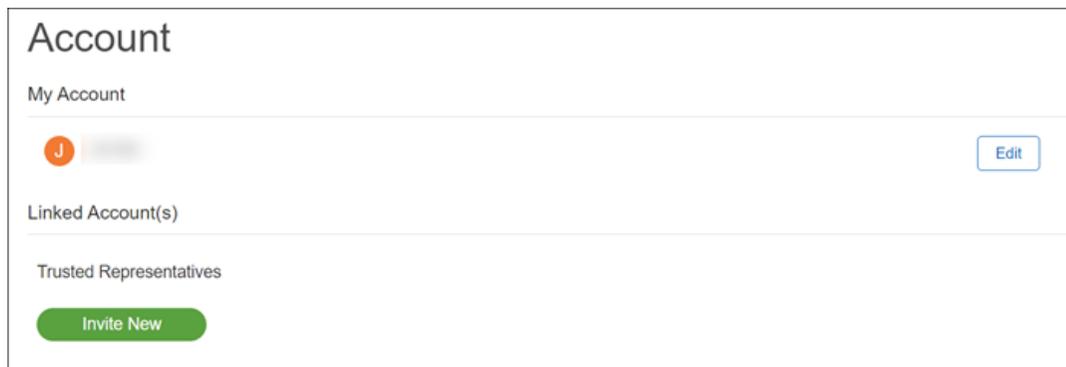
 **Note:** The names of icons and buttons appear in the selected language. Messages appear in the language that they are sent in.



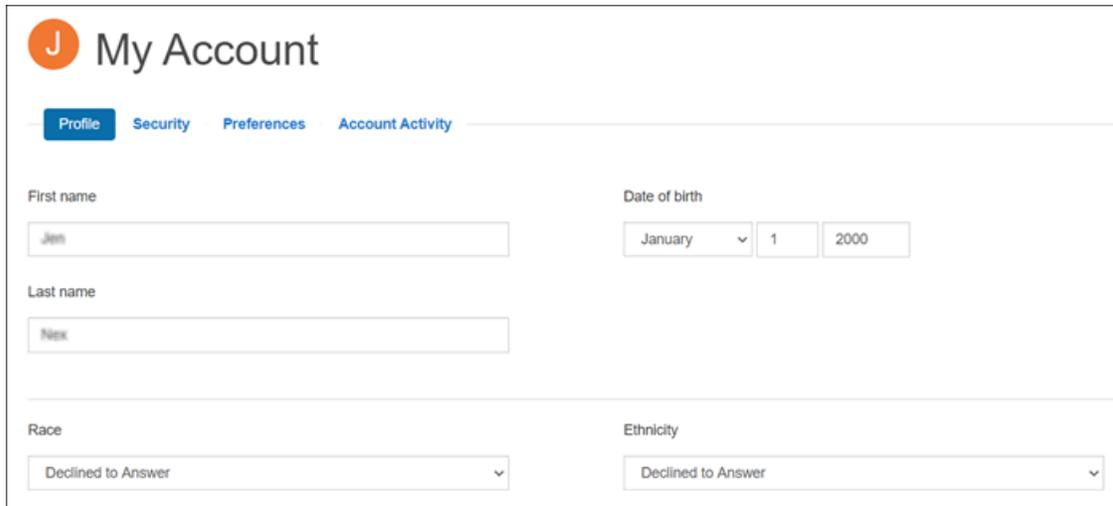
## Update Patient Profile Information

Patients can update their demographic and account information on the **Account** tab in NextGen PxP Portal.

1. Open NextGen PxP Portal.
2. On the upper-right corner of the home page, click **Account**.  
The **Account** page opens.



3. Click **Edit**.  
The **My Account** page opens on the **Profile** tab.
4. Make the desired changes to the demographic information and click **Save my changes**.



**My Account**

Profile Security Preferences Account Activity

First name: Jen

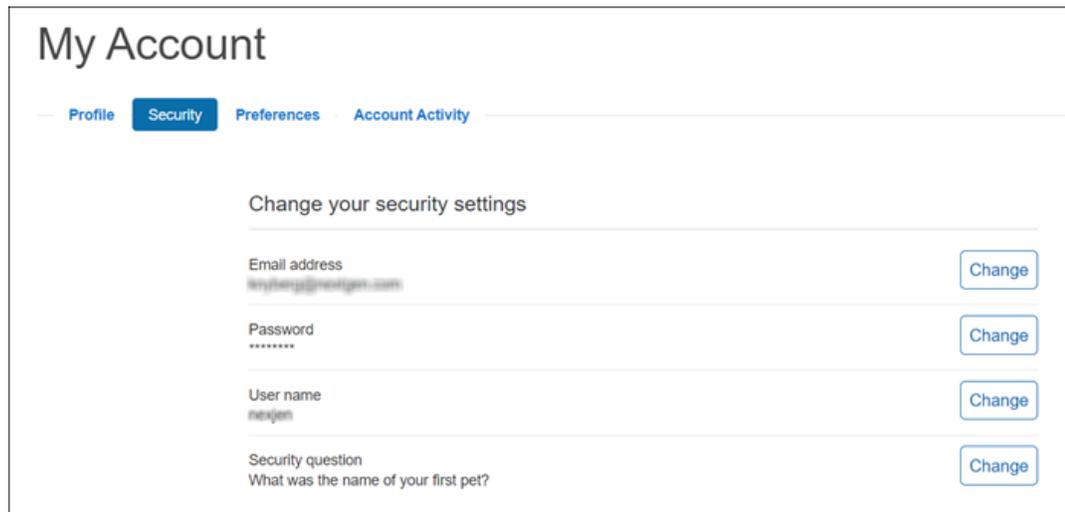
Last name: Nex

Date of birth: January 1, 2000

Race: Declined to Answer

Ethnicity: Declined to Answer

5. Click the **Security** tab.



**My Account**

Profile Security Preferences Account Activity

Change your security settings

Email address: nextgen@nextgen.com [Change]

Password: [Change]

User name: nextgen [Change]

Security question: What was the name of your first pet? [Change]

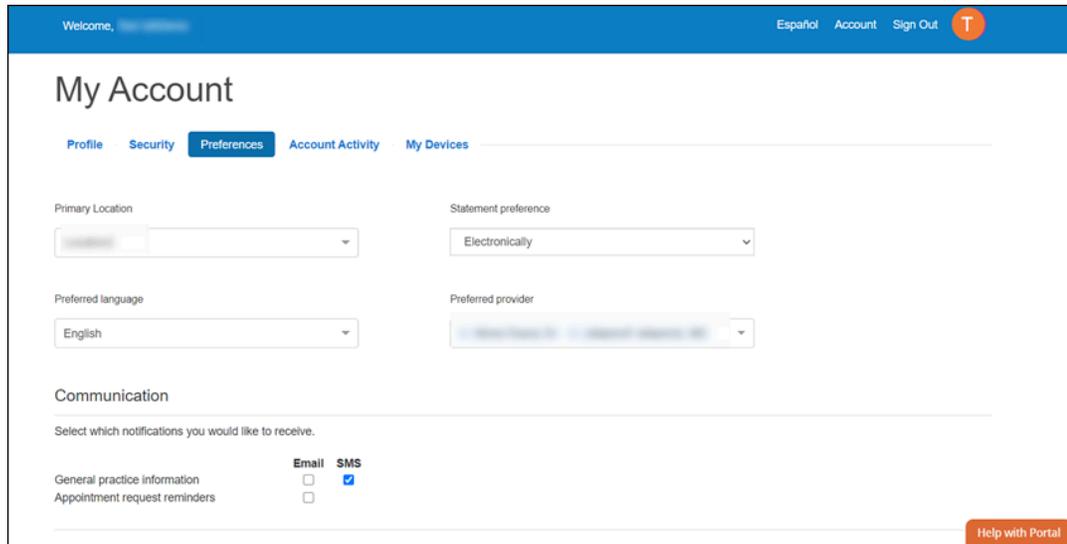
6. Click **Change** corresponding to the security details that you want to update. Update any of the following security details, and click **Save my changes**.

- Email address
- Password
- Username
- Security question

7. Click the **Preferences** tab.

8. Update the following preferences and click **Save my changes**.

- *Primary Location*. Select your provider location.
- *Preferred Language*. Select the language for NextGen PxP Portal.
- *Preferred Provider*. Select your provider.
- *Statement Preference*. Select the mode of delivery of statements. You can select statements, paper statements or both.
- *Communication*. Select how you want to be notified about practice information and appointment request reminders.



9. To view the history of patient portal account activity, click **Account Activity** tab.

## CHAPTER 7

# Enterprise-Level Enrollment

On the **Patient Activation** page, you can set up enterprise level enrollment for all practices in an enterprise to enable automatic enrollment of patients in NextGen PxP Portal.

 **Note:** This feature is available only in NextGen® Enterprise 6.2021.1 or later.

If you set up enterprise-level enrollment for all practices in an enterprise, and a patient enrolls in NextGen PxP Portal for one practice, when the patient visits another practice in the same enterprise, the patient is automatically enrolled in NextGen PxP Portal for the second practice. The patient can view and manage information related to both the practices under one NextGen PxP Portal account.

### Example

Scenario: Practice 1 and Practice 2 belong to Enterprise 1, and enterprise-level enrollment is set up for both the practices. A patient visits Practice 1, and completes the enrollment in NextGen PxP Portal.

When the patient visits Practice 2, the patient is automatically enrolled in NextGen PxP Portal. The patient can use the credentials for Practice 1 to view information related to Practice 1 and Practice 2 under one NextGen PxP Portal account.

### Example

Scenario: Practice 1, Practice 2, and Practice 3 belong to Enterprise 1. Enterprise-level enrollment is set up for Practice 1 and Practice 2, and practice level enrollment is set up for Practice 3. A patient visits Practice 1, and completes the enrollment in NextGen PxP Portal.

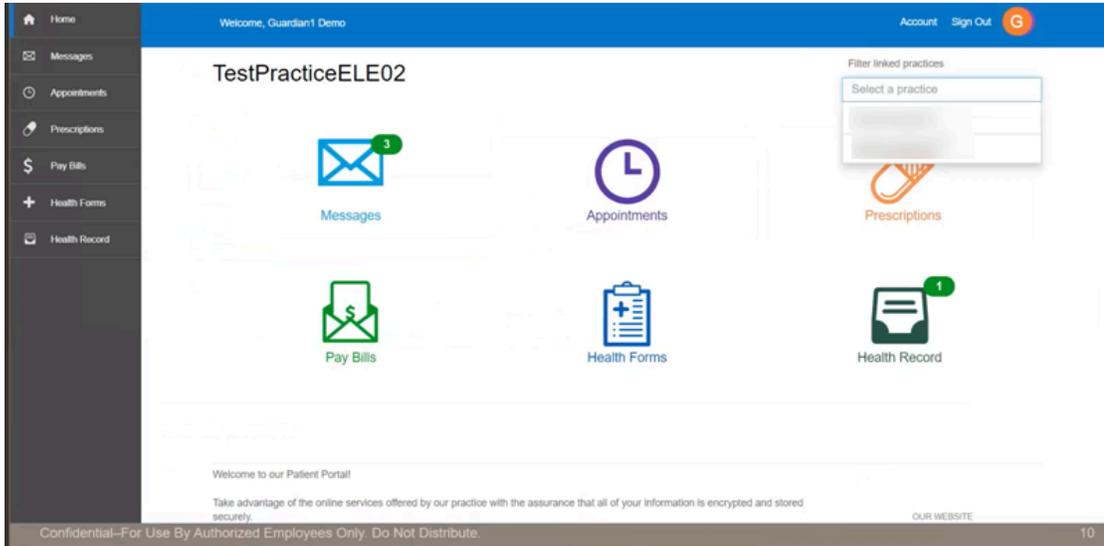
When the patient visits Practice 2, the patient is automatically enrolled in NextGen PxP Portal. The patient can use the credentials for Practice 1 to view information related to Practice 1 and Practice 2 under one NextGen PxP Portal account.

When the patient visits Practice 3, the patient receives an enrollment invitation email as Practice 3 is set up for practice-level enrollment. The patient must enroll to NextGen PxP Portal for Practice 3 to view all information related to Practice 3.

## Managing Multiple Practices in NextGen PxP Portal

Patients who are enrolled in multiple practices of an enterprise can manage the information related to each practice through one NextGen PxP Portal account. This functionality is available when the practices are configured for enterprise-level enrollment.

Patients can select a practice from the **Filter linked practices** list and manage the information for the selected practice.



## CHAPTER 8

# Linking Guardian and Dependent Accounts

A practice can assign a guardian to access and manage a dependent's portal account if the guardian portal account is linked to the dependent portal account.

## Enroll as Guardian for Dependent Patient

### Before You Begin

Ensure that the patient or the person has received an email from the practice inviting them to create a NextGen PxP Portal guardian account.

A patient or person can enroll themselves as the guardian to access and manage a dependent NextGen PxP Portal account. To do this, the patient or person has to link the guardian portal account to the dependent NextGen PxP Portal account.

1. In the invitation email received from the practice, click **Sign up**.  
The **Please Identify The Patient** page opens.
2. Enter the dependent patient's zip code and date of birth.

**Please Identify The Patient**  
In order for you to create an account as a guardian, we need to verify that you know some details about the patient.

Patient: K\*\*\*\*\*@\*\*\*\*\*ia

Patient's ZIP code

Patient's Date Of Birth

Month Day Year

Cancel Continue

3. Click **Continue**.  
The **Welcome** window opens.
4. To enter the NextGen PxP Portal, do one of the following:
  - If the guardian already had a NextGen PxP Portal account, type the username, password, and relationship with the dependent patient. Click **Enter Portal**.

**Welcome!**

We are inviting you, as a **parent or guardian** of Thomas Galvin, to join our portal.

If you **already have an account** at our practice, enter your username and password and click Enter Portal.

User name

Relationship to patient

Password

Patient's Primary Location

[I forgot my user name and/or password.](#)

- If the guardian does not have a NextGen PxP Portal account:
  - Type the first name, last name, email address, and relationship with the dependent patient. Click **Next**.

The **Create Security Details** window opens.

If not, **create an account** by entering your information below.

**You - Parent or Guardian**

First name

Last name

Email address

Relationship to patient

**Patient - Child or Dependent**

First name:

Last name:

Date of birth:

Gender:

Zip code:

- Enter values in the fields and click **Enter Portal**.

**Create Security Details!**  
Please create a password and answer a secret question for future retrieval.

User name:

Secret Question:

Password:   
6-32 characters. At least 1 number or symbol.

Answer:

Primary Location:

Phone:    Type:

By Creating an account, I accept my health care provider's Notice Of Privacy Policy and The Terms Of Service.

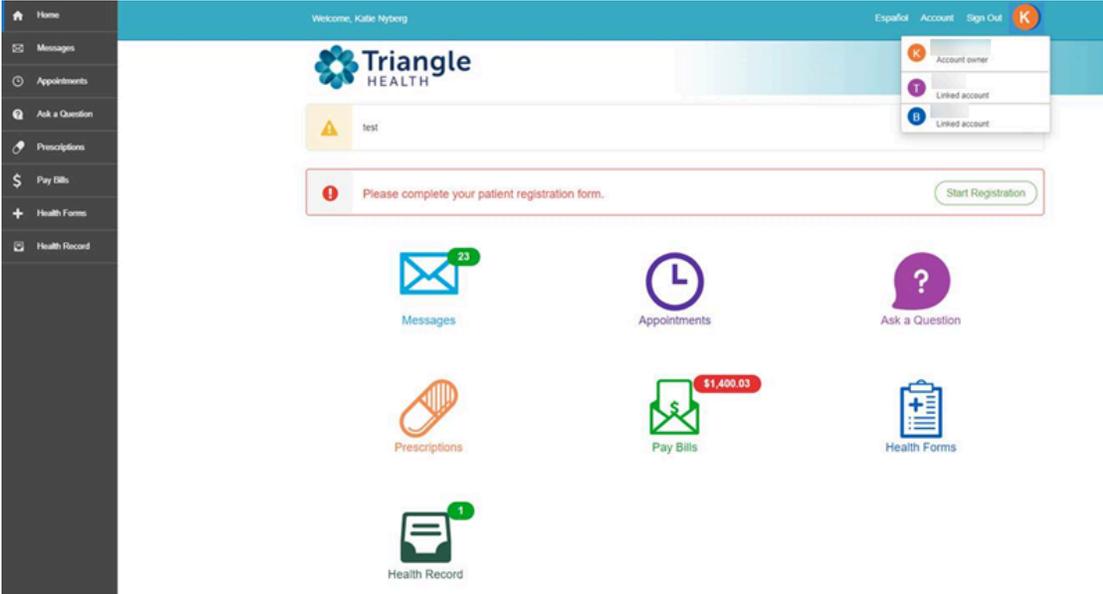
[Back](#) [Enter Portal](#)

The guardian portal account is linked to the dependent NextGen PxP Portal account and the guardian is logged on to the dependent portal account automatically.

**Note:** The guardian can manage multiple dependent portal accounts using the same username and password.

## Viewing Linked Accounts in NextGen PxP Portal

Users (patient or person) can click the user icon next to **Sign Out** to select a linked dependent's account. They can view the records and manage the account on behalf of the dependent. The selected dependent's name appears on every window of NextGen PxP Portal.



If the logged on user is a patient as well, the patient's name also appears in the list of linked accounts. If the user is not a patient at the practice, only the dependent's name appears in the list of linked accounts.

The  icon next to a patient's name in the list indicates that the patient has unread messages or a balance due or has to complete a health form.

## CHAPTER 9

# Trusted Representative

A trusted representative is a person assigned to view the health information and act on behalf of an adult patient in NextGen PxP Portal.

The patient must send an email to the other person inviting them to create a trusted representative account. The patient initiates the access and monitors the trusted representative's account completely.

A trusted representative can do the following:

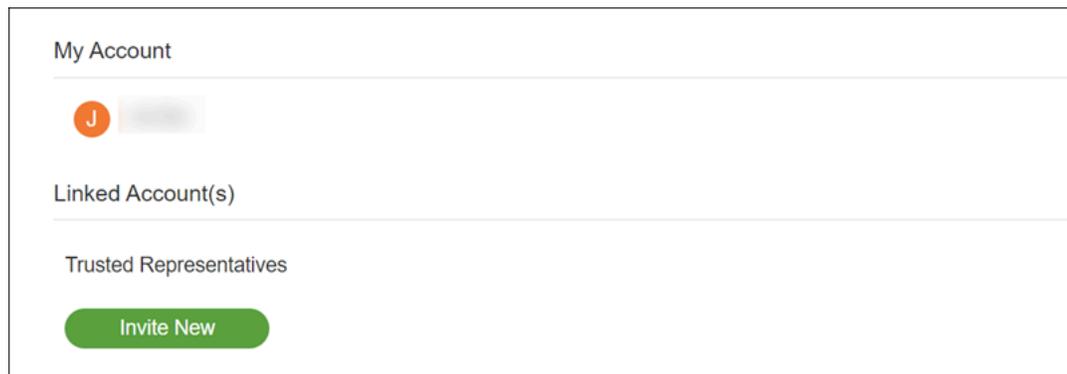
- View the messages of the patient
- Create a new **Ask a Question**
- Reply to messages from the practice on behalf of the patient
- View the health record data of patient

## Invite a Trusted Representative

A trusted representative can create a portal account when they receive the invitation from the patient.

1. Open NextGen PxP Portal and click **My Account**.

The **My Account** page opens.



2. Click **Invite New**.

The **Invite Trusted Representative** page opens.

**Invite Trusted Representative**

**Account Details**  
Complete the following information to give a trusted representative access to your patient portal and we will send them an invite link via email.

First name \* [Text Field] Last name \* [Text Field]  
Email Address \* [Text Field] Relation to You \* [Dropdown Menu]

**Manage Access**  
Control what this trusted representative can see and do throughout your patient portal.

View and perform actions  View only  Manage access per category

Cancel Send Invitation

3. In the **Account Details** section, enter the first name, last name, email address and the relationship of the trusted representative.
4. In the **Manage Access** section, select access for the trusted representative. You can select one of the following permissions for the trusted representative.
  - **View and perform actions.** For complete access to all modules.
  - **View only.** For view only access to all modules.
  - **Manage access per category.** For access to selected modules.

**Note:** The modules enabled for the practice in the **Manage Your Online Solutions** page in Site Generator are displayed when you select **Manage access per category**.

**Manage Access**  
Control what this guardian can see and do throughout your patient portal

View and perform actions  View only  Manage access per category

**Warning:** If you do not want your trusted representative, to see health related information, we recommend unchecking the Message category as well.

|               |  |                                 |                                 |
|---------------|--|---------------------------------|---------------------------------|
| Appointments  | <input checked="" type="radio"/> Schedule and view | <input type="radio"/> View only | <input type="radio"/> No access |
| Payments      | <input checked="" type="radio"/> Request and view  | <input type="radio"/> View only | <input type="radio"/> No access |
| Forms         | <input checked="" type="radio"/> Request and view  | <input type="radio"/> View only | <input type="radio"/> No access |
| Messages      | <input checked="" type="radio"/> Send and view     | <input type="radio"/> View only | <input type="radio"/> No access |
| Medications   | <input checked="" type="radio"/> Request and view  | <input type="radio"/> View only | <input type="radio"/> No access |
| Health Record | <input checked="" type="checkbox"/> Full Access    |                                 |                                 |

5. Click **Send Invitation**.  
The invitation to create a portal is sent by email to the trusted representative.

## Enroll as a Trusted Representative

### Before You Begin

The trusted representative must have received an invitation from the adult patient.

1. In the invitation email, click **Sign up!**.  
The **Please Identify the Patient** page opens.

Español

### Please Identify the Patient

In order for you to create an account as a trusted representative, we need to verify that you know some details about the patient. Please enter the patient's date of birth and zip code.

Patient: Jen \*ex

Patient's ZIP code

Patient's date of birth

Month  Day  Year

Cancel Continue

2. Enter the zip code and date of birth of the patient, and click **Continue**.  
The **Welcome!** page opens.
3. To enter the NextGen PxP Portal, do one of the following:
  - If the trusted representative already had a NextGen PxP Portal account, type the username, password, and relationship with the patient. Click **Enter Portal**.

### Welcome!

We are inviting you, as a **trusted representative** of Jen Nex, to join our portal.

If you **already have an account** at our practice, enter your username and password and click Enter Portal.

User name

Relationship to patient

Password

Enter Portal

[I forgot my user name and/or password.](#)

- If the trusted representative does not have a NextGen PxP Portal account:
  - Type the first name, last name, email address, and relationship with the patient. Click **Next**.

The **Create Security Details** window opens.

If not, **create an account** by entering your information below.

**You - Trusted Representative**

First name  Email address

Last name  Relationship to patient

**Patient -**

First name:  Date of birth:

Last name:  Zip code:

- Enter values in the fields and click **Enter Portal**.

**Create Security Details**

Please create a password and answer a secret question for future retrieval.

User name  Secret Question

Password  Answer

Your password must contain 8-32 characters, include no common words, and fulfill three of the following:  
one capital letter  
one lower case letter  
one number  
one symbol (&%#@!?)

Phone    Type

By creating an account, I accept my health care provider's [Notice of Privacy Policy](#) and the [Terms of Service](#).

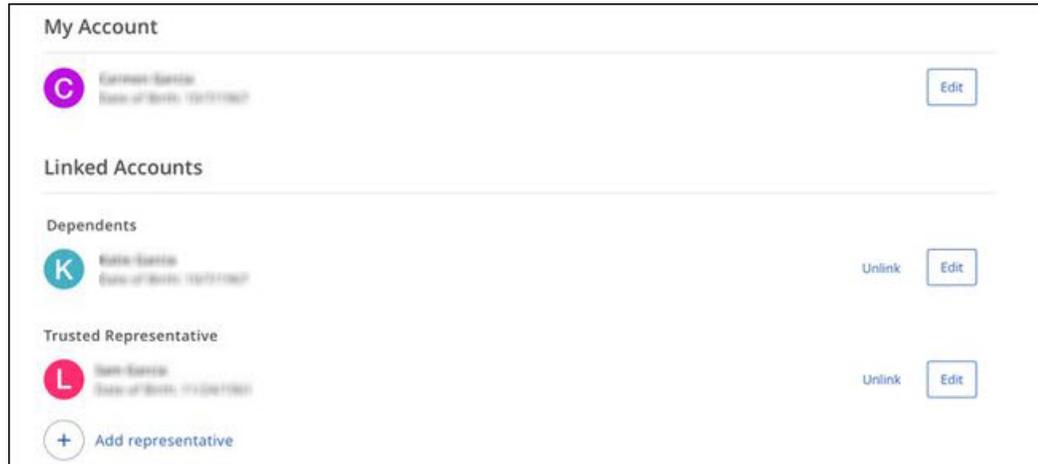
The Trusted representative NextGen PxP Portal account is created and you are logged on to NextGen PxP Portal automatically on behalf of the patient who invited you.

## ***Change the Access Rights of Trusted Representative***

Patients can remove a trusted representative using the **Unlink** option in their NextGen PxP Portal account. They can also change the type of access provided to the trusted representative.

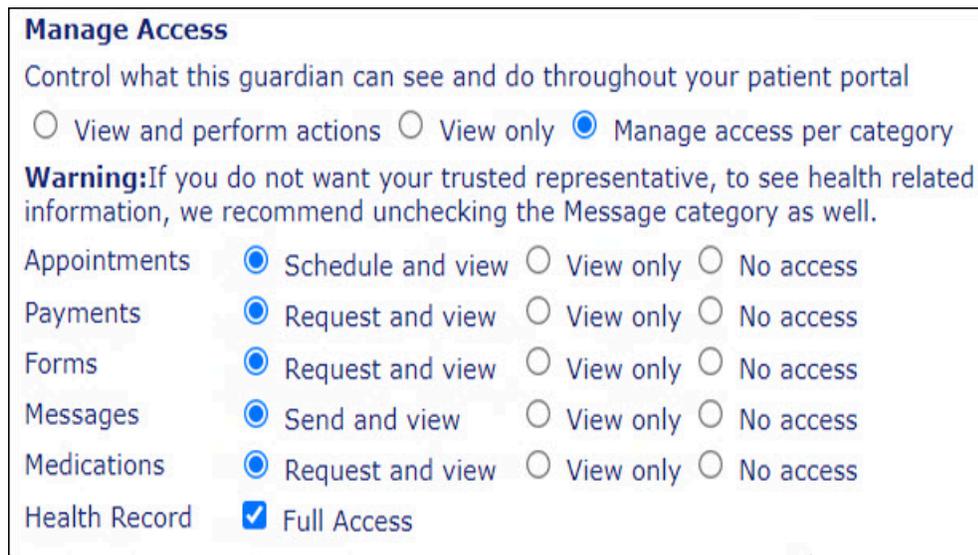
1. Open NextGen PxP Portal and click **My Account**.

The **My Account** page opens.



2. Click the **Edit** button for the trusted representative that you want to manage.  
A page opens displaying the details of trusted representative.
3. In the **Manage Access** section, select the access type to be provided.
4. You can select one of the following permissions for the trusted representative.
  - **View and perform actions** to provide complete access to all modules.
  - **View only** to provide only view access to all modules.
  - **Manage access per category** to provide access for individual modules.

 **Note:** The modules enabled for the practice in the **Manage Your Online Solutions** page in Site Generator are displayed when you select **Manage access per category**



5. Click **Save my changes**.

## CHAPTER 10

# Message

Patients get all their health related information through messages sent by you. The **Message** icon appears on the home page and also on the navigation bar on NextGen PxP Portal dashboard.

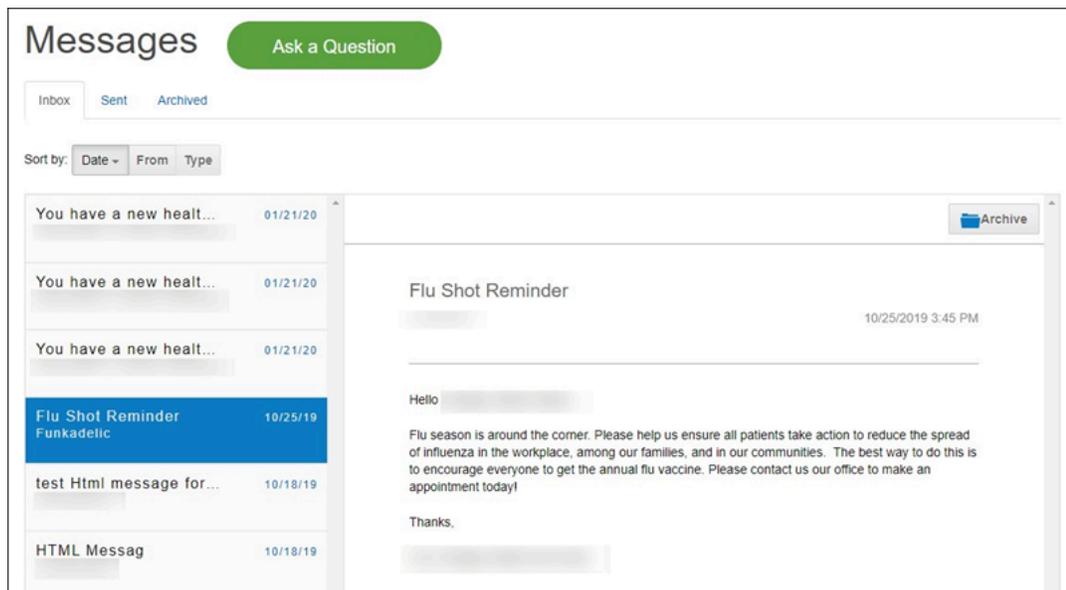
You can sort the message inbox in the following ways.

- *Date*. Newest to oldest or oldest to newest
- *From*. Group together by the sender of the message
- *Type*. Group together by the subject of the message

Messages sent by practice with high priority are displayed with a high priority indicator.

## View Messages

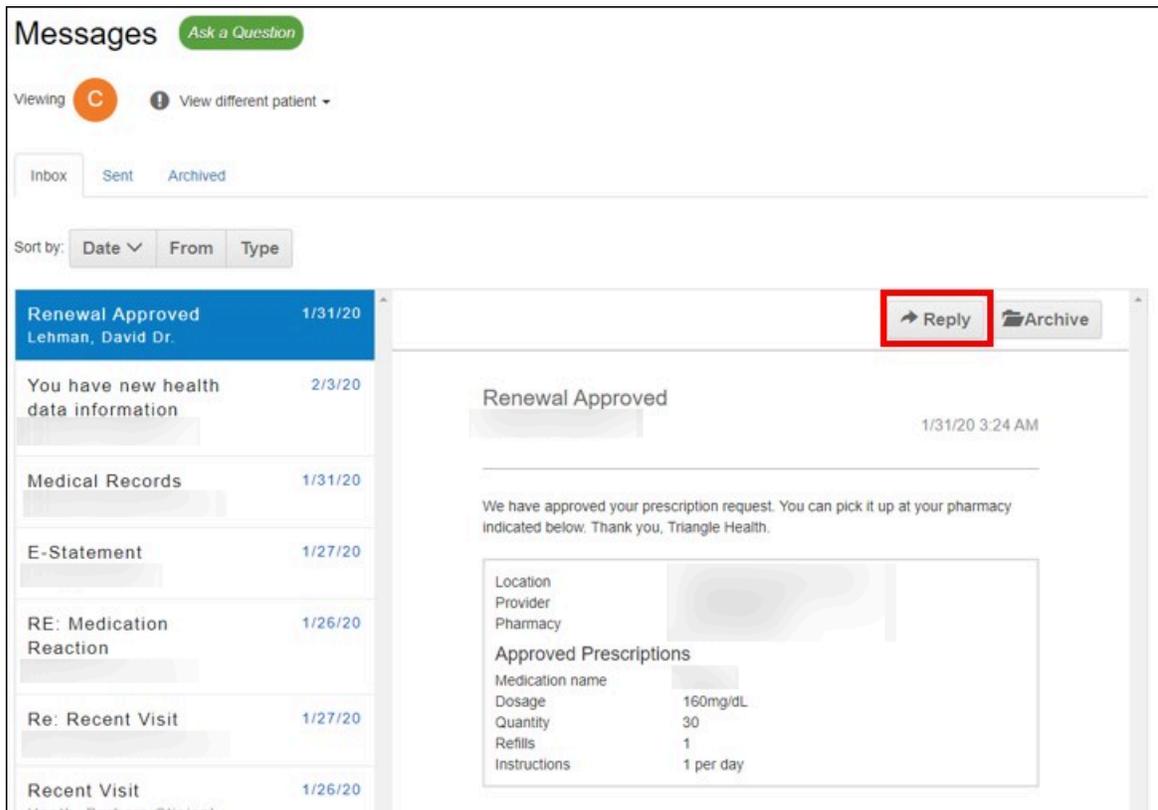
1. Open NextGen PxP Portal.
2. Click **Messages** on the home page or on the navigation bar on the dashboard.  
The **Messages** page opens displaying the **Inbox** section.
3. Click a message to view the message content on the right side.



You can view your sent messages on the **Sent** tab. You can view your archived messages on the **Archived** tab.

## Reply to Message

1. Open NextGen PxP Portal.
2. Click **Messages** on the home page or on the navigation bar on the dashboard.  
The **Messages** page opens.
3. Open message to view content.
4. Click **Reply**.



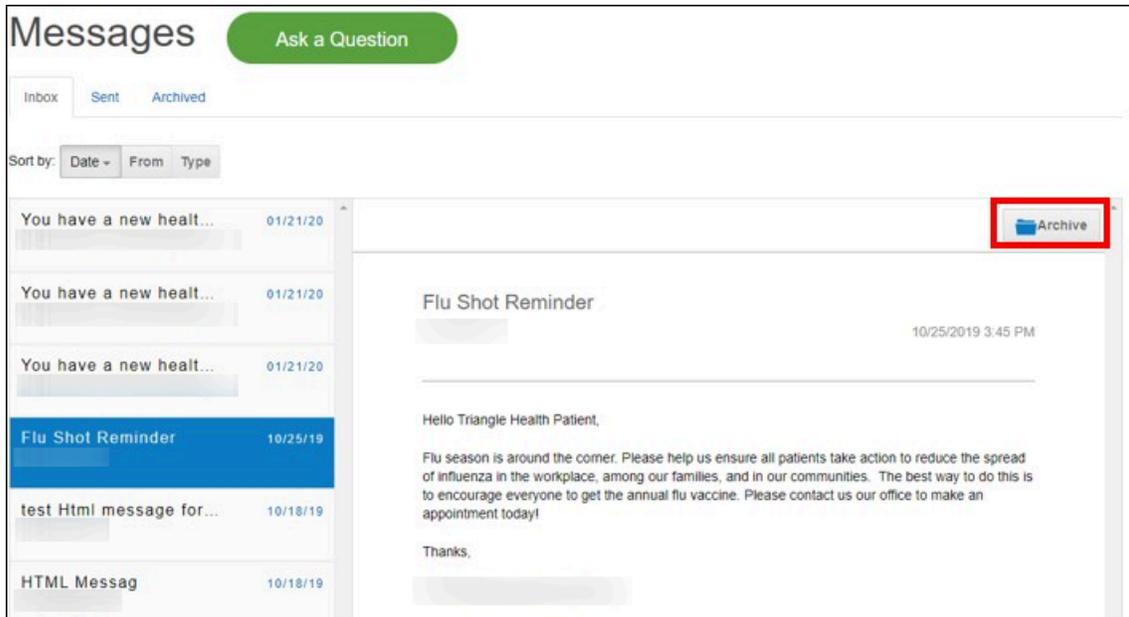
The **Reply to Message** page opens.

5. Compose your reply and click **Send**.

 **Note:** If the **Reply** button is not available in a message, you can compose a new message by clicking **Ask a Question**.

## Archive Message

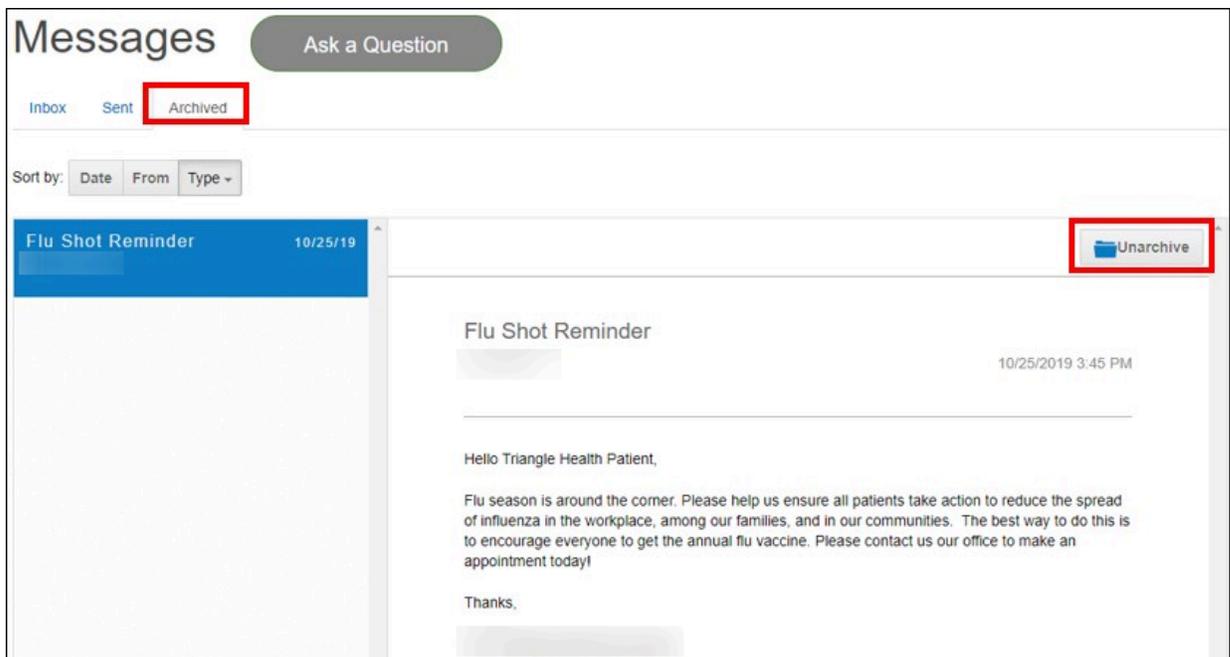
1. Open NextGen PxP Portal.
2. Click **Messages** on the home page or the navigation bar on the left of dashboard.  
The **Messages** page opens.
3. Open the desired message and click **Archive**.



 **Note:** You cannot delete a message in NextGen PxP Portal.

## Unarchive Message

1. Open NextGen PxP Portal.
2. Click **Messages** on the home page or the navigation bar on the left of dashboard. The **Messages** page opens.
3. To view the archived messages, click the **Archived** tab.
4. Open the desired archived message and click **Unarchive**.



## Asking a Question

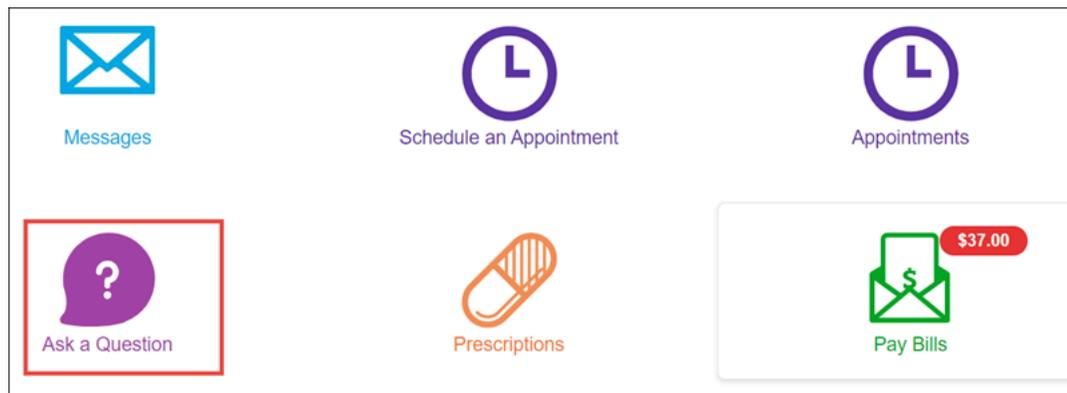
Patients can ask questions to providers by clicking **Ask a Question**. The **Ask a Question** button is available on the home page, **Message** page, and the navigation bar of NextGen PxP Portal.

The questions are divided into different categories. For example,

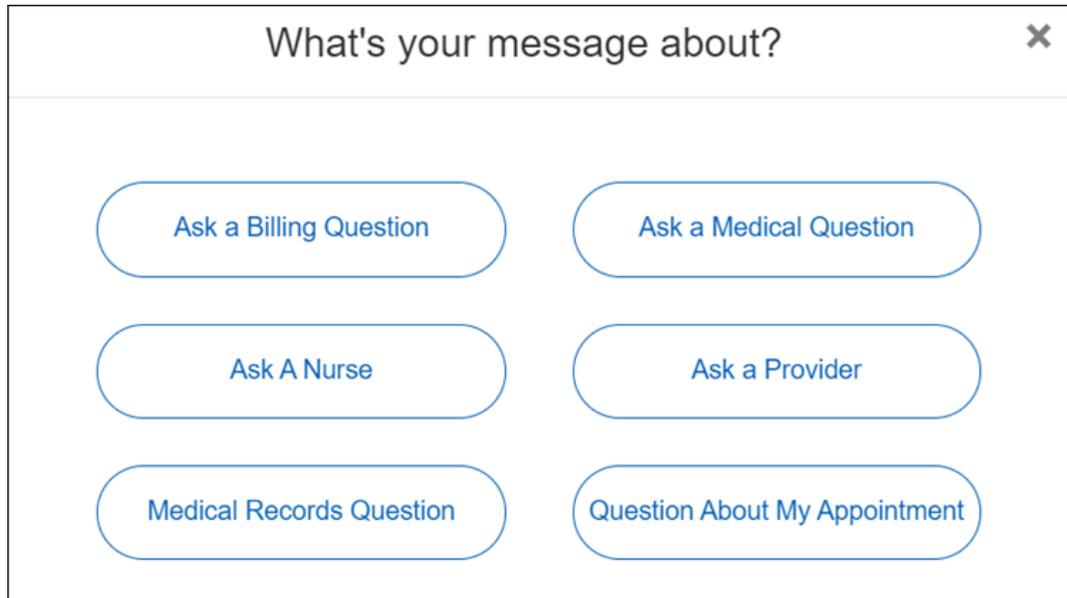
- Billing Question
- Medical Question
- Medical Records Question
- Question About My Appointment
- Question to Nurse
- Question to Provider

## Submit a Question

1. Open NextGen PxP Portal.
2. Click **Ask a Question** on the home page, **Message** page, or on the navigation bar of NextGen PxP Portal dashboard.



The **What's your message about?** page opens.



3. Select a question category.

 **Note:** The fields marked with asterisk \* are mandatory.

4. Enter values in the fields.

5. To add an attachment, click **Choose File**.

You can add up to five attachments in the bmp, doc, png, jpg, xxl, pdf, tiff, txt, docx, tif, xml, rtf, jpeg and, xlsx formats. The maximum size of attachments allowed is 2MB.

6. Click **Continue**.

Ask Question History

Location: 243 Main St.  
Cary, NC 27513

Staff: Bender, Robert, M.D.

Subject:

Question:

Back Submit Question

7. Click **Submit Question**.

Patients can view the previously submitted questions on the **History** tab.

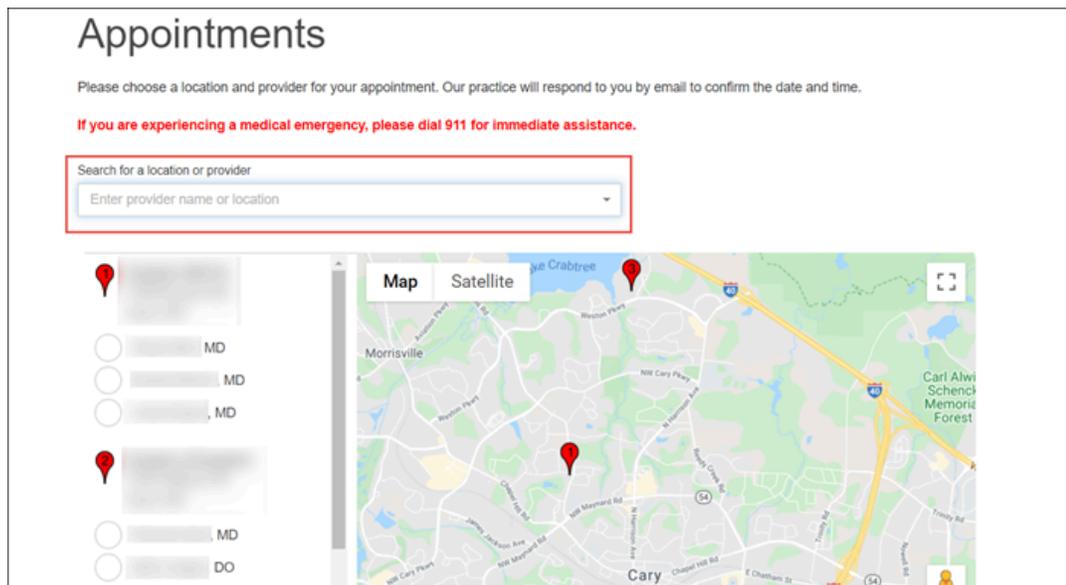
## CHAPTER 11

# Managing Appointments

Patients can send secured appointment requests to you with their preferred location, provider, and appointment time. You need to confirm the appointment request before it is scheduled. The **Appointment** icon is available on the home page and the navigation bar on the left of the NextGen PxP Portal dashboard.

## Submit Appointment Requests

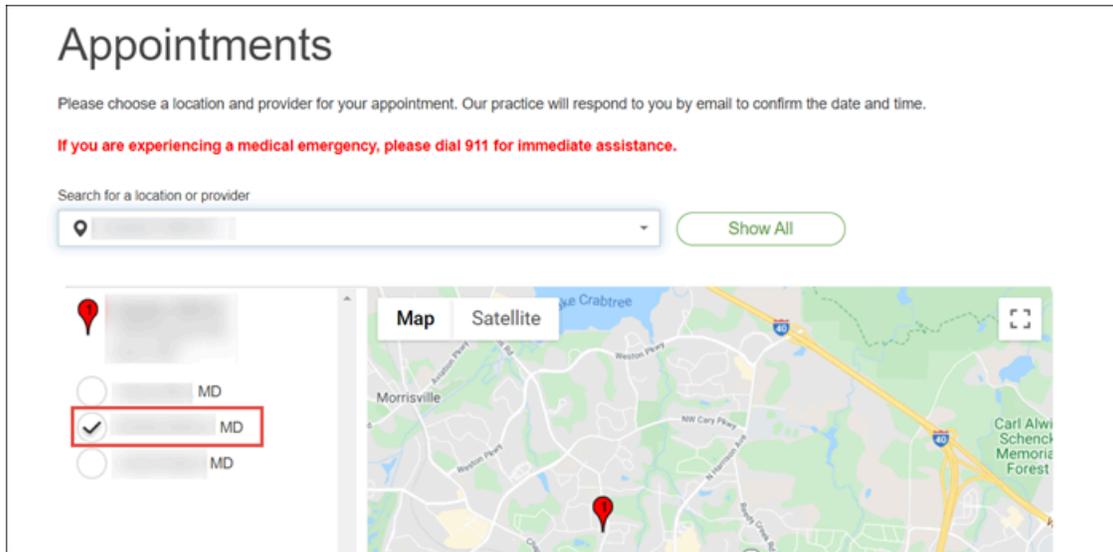
1. Open NextGen PxP Portal.
2. Click **Appointment**.  
The **Appointments** page opens.
3. Click **Request an Appointment**.
4. Select a location or provider from the list.



The selected location or provider appears to the left of the map.

**Note:** The patient can also select a location or provider from the list of previously seen providers that appears to the left of the map.

5. From the list of doctors below the desired provider's name, select a doctor and click **Continue**.



6. Choose the preferred appointment time.
  - *First available time.* Selects the first available time slot of provider.
  - *Times(s) of day.* Selects the preferred time of the day.
  - *Day(s) of week.* Selects the preferred day in a week.
  - *Week.* Selects the preferred week.

7. Write the reason for visit and click **Request appointment**.

## View Appointment Requests

Patients can view the upcoming, past, and previous appointment requests in NextGen PxP Portal.

1. Open NextGen PxP Portal.
2. Click **Appointments**.  
The **Appointments** page opens.
3. View the submitted appointment requests on the following tabs.

- **Upcoming**
- **Past**
- **Previous Requests**

**Appointments** [Request an Appointment](#)

— [Upcoming](#) **Past** [Previous Requests](#)

|         |         |  |  |
|---------|---------|--|--|
| 9/9/20  | 7:45 PM |  |  |
| 9/3/20  | 8:00 PM |  |  |
| 9/3/20  | 7:00 PM |  |  |
| 9/3/20  | 6:50 PM |  |  |
| 9/3/20  | 6:00 PM |  |  |
| 8/26/20 | 8:45 PM |  |  |

## CHAPTER 12

# *Overview of Patient Self Scheduling*

The NextGen® Patient Self-Scheduling (PSS) solution enables you to provide your patients different methods to schedule appointments online. Patients can perform the following tasks.

- Schedule online appointments using NextGen PxP Portal.
- Schedule online appointments as a guest, without logging on.
- Reschedule appointments through email and text reminders.

## CHAPTER 13

# Medication Renewal Requests

Patients can view the list of active and inactive medications on the **Medications** page. They can select active medications from the **Medication list** and inactive medications from the **Add inactive medications** list and submit medication renewal request.

 **Note:** Patients can renew inactive medications only if you have enabled **Include Inactive Medications** in **Prescription Renewal** page on Site Generator for your practice.

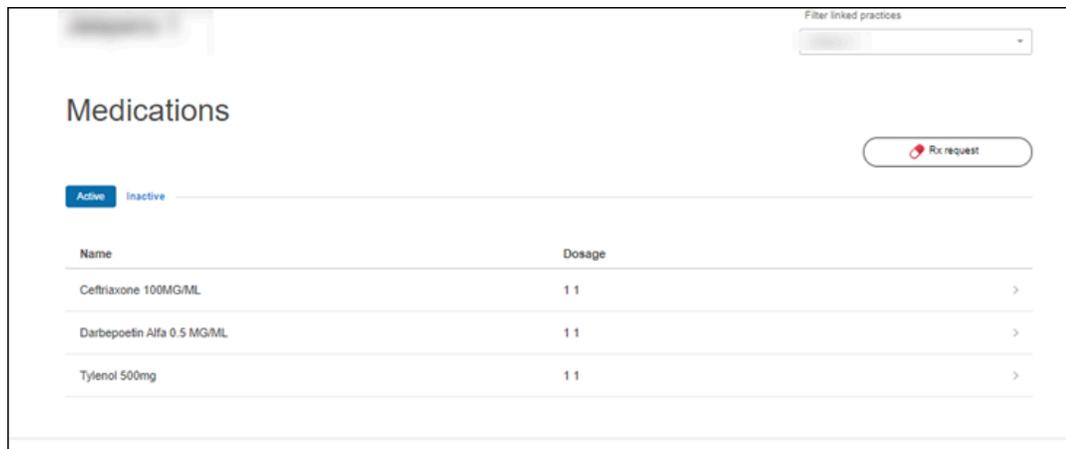
The practice reserves the right to accept or deny a patient's medication renewal request. The practice contacts the patient to explain the reason if they are denying the request.

Patients can view the previous renewal requests on the **Sent** tab in **Messages**.

## Submit Medication Renewal Requests

1. In NextGen PxP Portal, click **Medications**.

The **Medication** page opens displaying the active and inactive medications.



2. Click **Rx-request**.

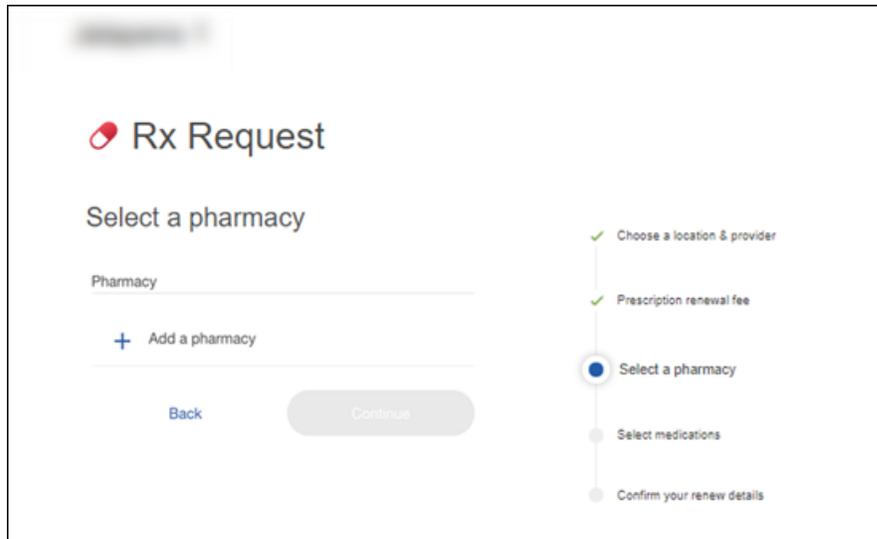
The **Rx Request** page opens. A navigation on the right side indicates the step in progress.

The screenshot shows the 'Rx Request' page. At the top right, there is a 'Filter linked practices' dropdown menu. The main heading is 'Rx Request'. Below it, the section is titled 'Choose a location & provider'. There are two dropdown menus: 'Choose location' and 'Choose provider', both marked as 'Required'. Below these are 'Back' and 'Continue' buttons. On the right side, there is a vertical progress indicator with five steps: 'Choose a location & provider' (active), 'Prescription renewal fee', 'Select a pharmacy', 'Select medications', and 'Confirm your renew details'.

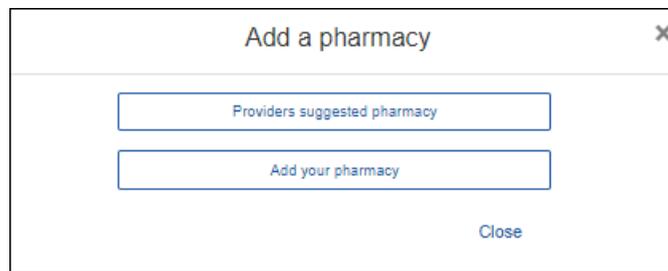
- The **Choose a Location** field displays the preferred location selected in the **My Account** section.
3. Select the desired location and provider, and then click **Continue**.  
The **Prescription renewal fee** page opens displaying processing fee for refilling the prescription without an appointment..

The screenshot shows the 'Rx Request' page at the 'Prescription renewal fee' step. The heading is 'Rx Request' and the sub-heading is 'Prescription renewal fee'. A message states: 'We are happy to refill your prescription, but require a small processing fee without an appointment.' Below this, there is a field for 'AMOUNT DUE' with a dollar sign and a blurred value. Underneath is the 'Payment method' section, which includes a dropdown menu with a checkmark, 'Edit', and 'Remove' buttons. There is also an '+ Add New Card' link. Below that is an 'Enter CVV' field with a blurred input. At the bottom are 'Back' and 'Use this credit card' buttons. On the right side, the vertical progress indicator shows 'Choose a location & provider' as completed with a green checkmark, and 'Prescription renewal fee' as the current active step.

4. Do the following:
  - a. Select the payment method.
    - To update an existing card, click **Edit**.
    - To add a card, click **Add New Card**.
  - b. Type the CVV number of the selected card.
  - c. Click **Use this credit card**.The **Select a pharmacy** page opens.

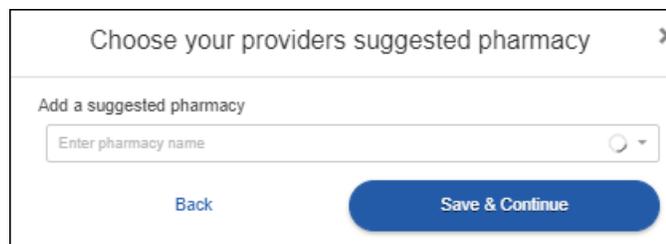


5. Click **Add a pharmacy**.  
The **Add a pharmacy** page opens.



 **Note:** The **Add your pharmacy** option is not available for NextGen Enterprise 6.2021.1 and below.

6. Do one of the following:
  - Click **Providers suggested pharmacy**, select the desired pharmacy name from the **Add a suggested pharmacy** list, and then click **Save & Continue**.



- Click **Add your pharmacy**, type the pharmacy details in the form, and then click **Save & Continue**.

**Add your pharmacy** ✕

Name of pharmacy *Required*

Phone number *Required*

Fax number

Address

City

State

Zip code

Back Save & Continue

- 7. On the **Select a pharmacy** page, click **Continue**.  
The **Select medications** page opens displaying the list of active medications.

**Rx Request**

## Select medications

Use the Prescription Renewal feature to request medication refills from our practice.

**Medication list**

- 4xs20kS Tablet 5 MG/M 5
- 6qkRf3Oh Tablet 5 MG/M 5
- BVNPRzEk Tablet 5 MG/M 5
- niCHwtfO Tablet 5 MG/M 5

+ Add an inactive medication

Request a new medication  
Choose a medication

Back Continue

8. Do one of the following:

- In the **Medication list** section, select the required medications and click **Continue**.
- To add an inactive medication, click **Add an inactive medication** link.

The **Add inactive medications** page opens. You can select the required medications and click **Ok**.

**Add inactive medications**

**Inactive medication list**

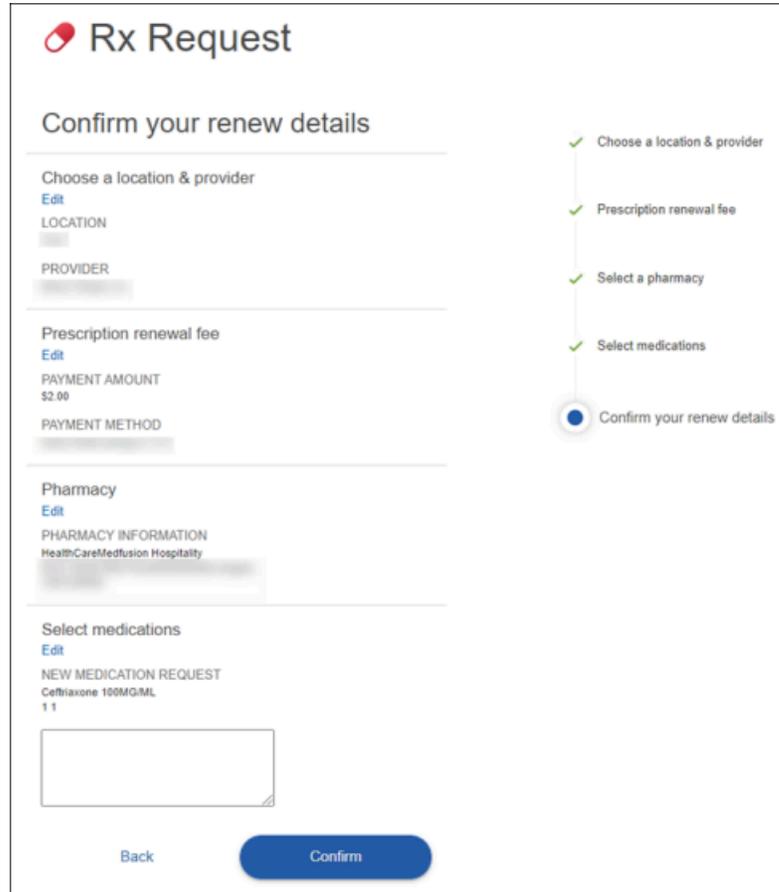
- 09vDKTAV Tablet 5 MG/M 5
- 1A8MRe7 Tablet 5 MG/M 5
- 2K38VaE9 Tablet 5 MG/M 5
- 2Pi0qHz Tablet 5 MG/M 5
- 2xvdjS3I Tablet 5 MG/M 5
- 3ktuYDc8 Tablet 5 MG/M 5
- 5QBGQII1 Tablet 5 MG/M 5
- 9dpK8Q9P Tablet 5 MG/M 5
- 9nnJA2Cb Tablet 5 MG/M 5

Close Add

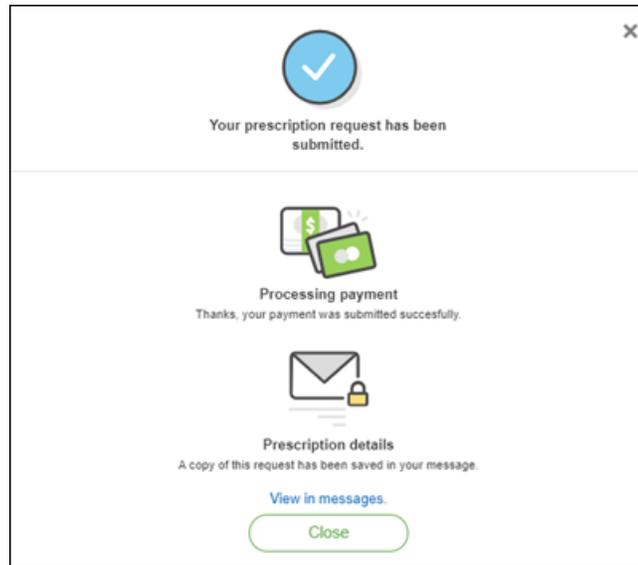
- To request a new medication, start typing the medication name in the **Request a new medication** field to view the matching medications. You can select the required medication from the list, and then click **Continue**.

 **Note:** The **Request a new medication** field is not available for NextGen Enterprise 6.2021.1 and below.

The **Confirm your renew details** page opens displaying the values entered in the previous pages. You can modify the values by clicking **Edit**.



9. Type your comments and click **Confirm**.  
The medication renewal request is submitted successfully.



A copy of the renewal request is added on the **Sent** tab in **Messages**. To view the renewal request, click **View in messages**.

## CHAPTER 14

# Managing Payments

Patients can submit payments and view the history of payments in the **Pay Bills** page in NextGen PxP Portal.

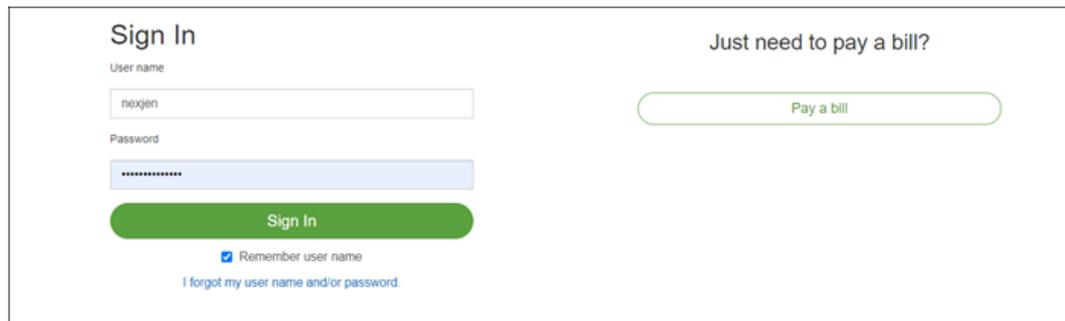
Patients who are guarantors of other patients can view the payment balance for all the encounters having them as guarantor. If a patient is not a guarantor then, no amount is displayed in the **Pay Bills** page.

Patients can make one-time payments without logging on to NextGen PxP Portal.

## Pay Bills Without Logging On to NextGen PxP Portal

Patients can make one-time bill payments without logging on to NextGen PxP Portal.

1. Open the logon page of NextGen PxP Portal.



The screenshot shows the NextGen PxP Portal login interface. On the left, under the heading "Sign In", there are two input fields: "User name" containing "nextgen" and "Password" with masked characters. Below these is a green "Sign In" button, a checked "Remember user name" checkbox, and a link "I forgot my user name and/or password." On the right side of the page, under the heading "Just need to pay a bill?", there is a green "Pay a bill" button.

2. Click **Pay a bill**.  
The **Pay Here** page opens.

**Pay Here**

Please complete all required fields below to make a quick payment. Please log in or create an account for more payment options.

**Name on card** \*

**Cardholder same as Patient**

**Patient Name** \*

**Patient Date of Birth** \*

**Patient Account Number** \*

**Credit Card Type** \* Choose One

**Card Number** \*

**Credit Card Expiration** \* Choose One  / Choose One

**Amount** \*

**CVV Code** \*

**Card Holder Zip Code** \*

**Service Location** \* Choose One

**Payment Comment** \*

**Email Address** \*

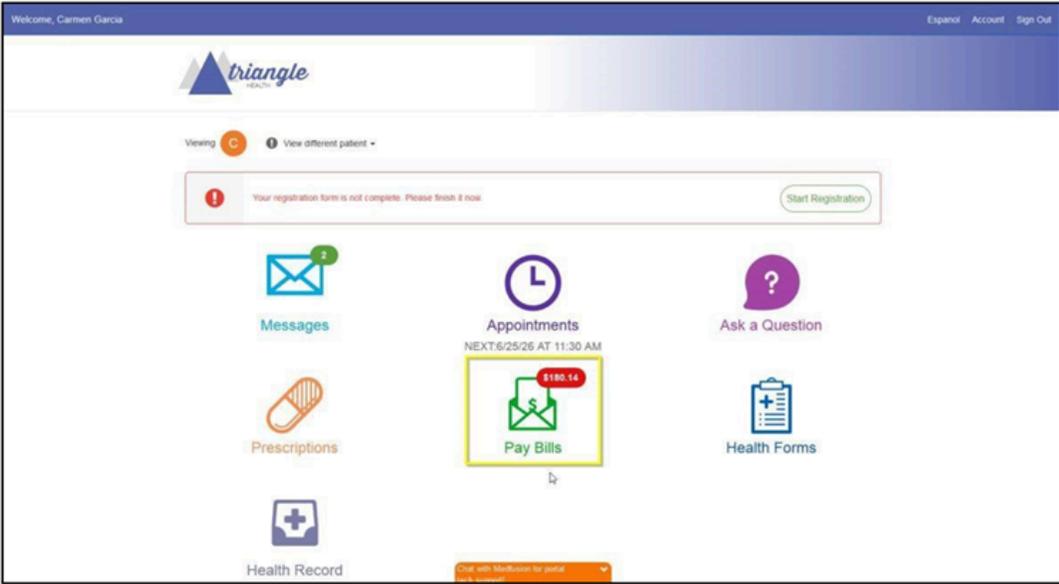
I'm not a robot  [Privacy](#) [Terms](#)

3. Enter values in the fields.
4. Select **I'm not a robot** and click **Submit Payment**.

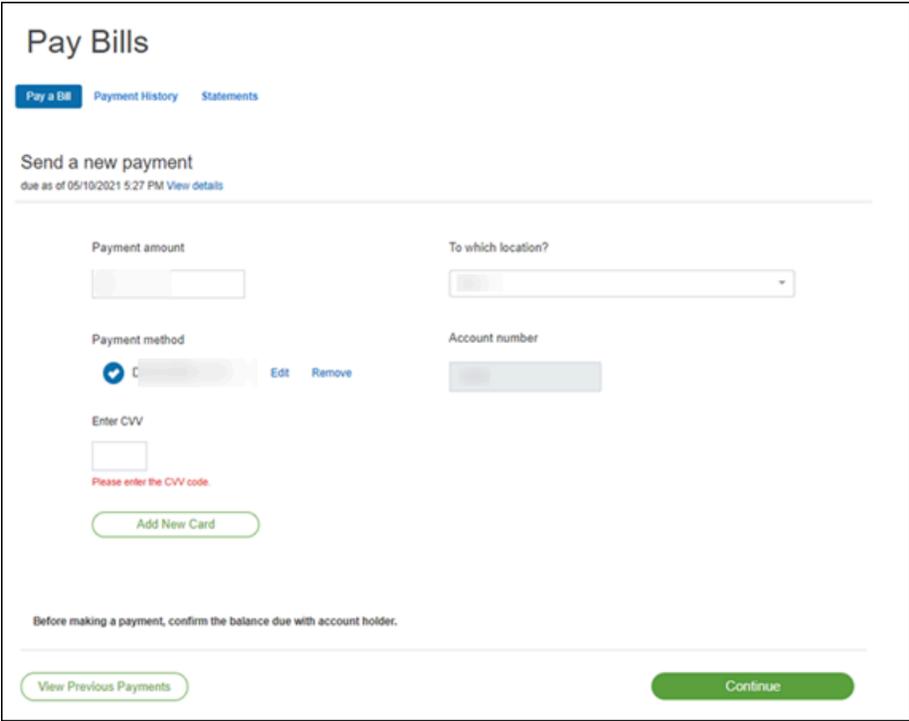
## *Pay Bills Through NextGen PxP Portal*

Patients can also store card information and view pending balance and the previous transactions made through NextGen PxP Portal.

1. In NextGen PxP Portal, click **Pay Bills**.



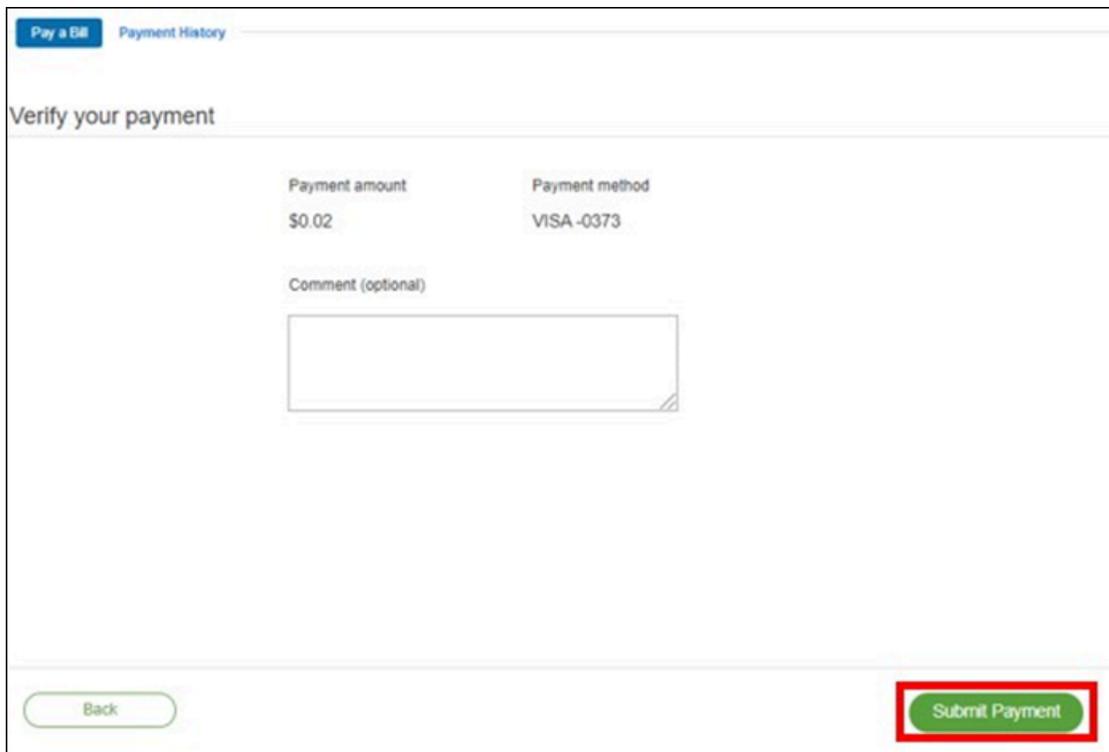
The **Pay Bills** page opens on the **Pay a Bill** tab.



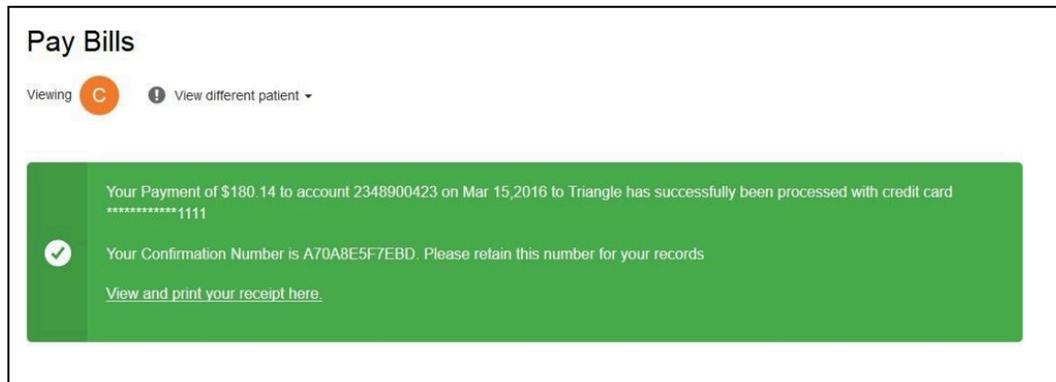
 **Note:** If balance presentment is enabled in Site Generator, and the pending payment is \$0, the **Pay Bills** page displays a message stating that there is no due balance.



2. Select the payment method, type the CVV code, and then click **Continue**. You can also add a card by clicking **Add New Card**.
3. Verify your payment details and click **Submit Payment**.



A message appears stating that the payment has been successfully processed.



4. To view or print the receipt, click **View and print your receipt here.**

You can view the previous payments made through NextGen PxP Portal in the **Payment History** tab.

 **Note:** Patients also receive a copy of the payment receipt by email.

## CHAPTER 15

# Health Forms

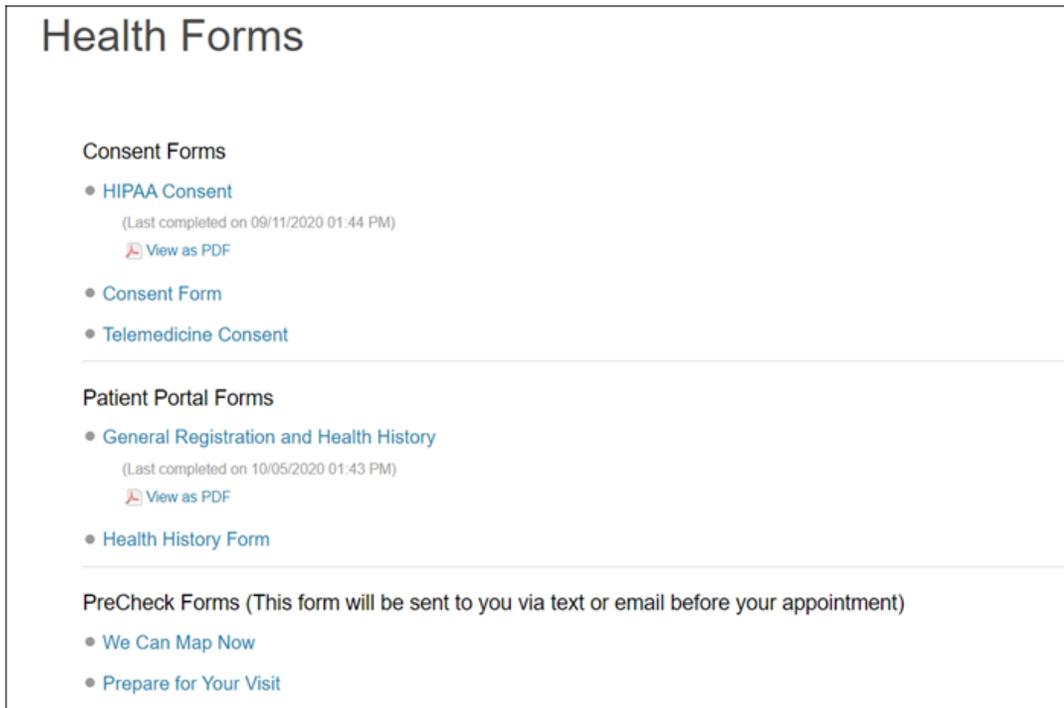
NextGen PxP Portal has several health forms such as Consent Forms, Portal Forms, Precheck forms, Other forms, and Registration form. Patients can save time if they complete these forms before visiting the practice.

 **Note:** The registration form is available to the patient only if it is configured in Site Generator. For more information, go to [NextGen Healthcare Success Community](#) and download the latest *User Guide for NextGen PxP Portal Site Generator*.

If the patient has not completed the registration form, a message appears on the home page of NextGen PxP Portal stating that the registration form is not completed and finish the registration now.

## Submit Health Forms

1. Open NextGen PxP Portal.
2. Click **Health Forms**.  
The **Health Forms** page opens.
3. Select the patient's location from the **Choose a Location** list and click **Select Location**.
4. Select the provider from the **Choose a Provider** list and click **Select Provider**.
5. Select the form that patient wants to complete.



**Health Forms**

**Consent Forms**

- [HIPAA Consent](#)  
(Last completed on 09/11/2020 01:44 PM)  
[View as PDF](#)
- [Consent Form](#)
- [Telemedicine Consent](#)

**Patient Portal Forms**

- [General Registration and Health History](#)  
(Last completed on 10/05/2020 01:43 PM)  
[View as PDF](#)
- [Health History Form](#)

**PreCheck Forms (This form will be sent to you via text or email before your appointment)**

- [We Can Map Now](#)
- [Prepare for Your Visit](#)

6. Complete the form and click **Submit**.

In the form, you can see the date and time when the form was last completed and a button to download the pdf version of the completed form.

## General Registration and Health History

---

- [General Registration and Health History](#)  
(Last Completed on 03/17/2016 11:18 AM)

 [View as PDF](#)

## CHAPTER 16

# Health Records

A patient's health related records such as office visit notes (Personal Health Record) and any attachments that have been sent to the portal account are maintained by the Health Record section. The health records are available to the patient only when you send a Clinical Visit Summary or any attachment to the portal account.

## Access Health Records

1. Open NextGen PxP Portal.
2. Click **Health Records**.

The health record summary page opens on the **Clinical summaries** tab.



 **Note:** You can access the health records using the **Health Records** button on the **Start Registration** home page as well.

3. Click the **Other documents** tab to view the documents that are available in a specific message.

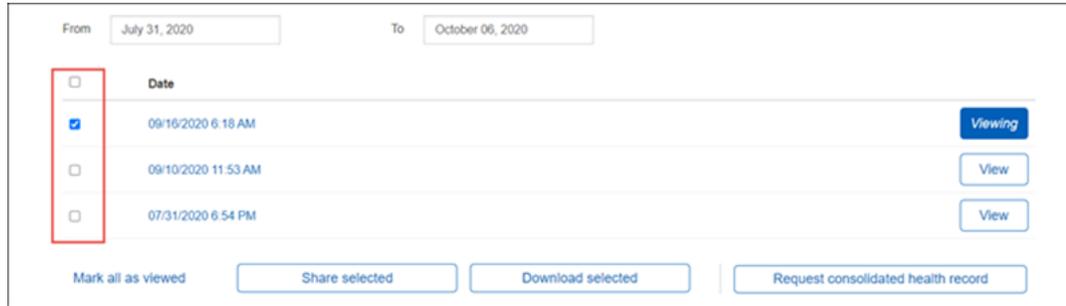
## Share Personal Health Record

1. Open NextGen PxP Portal.
2. Click **Health Record**.

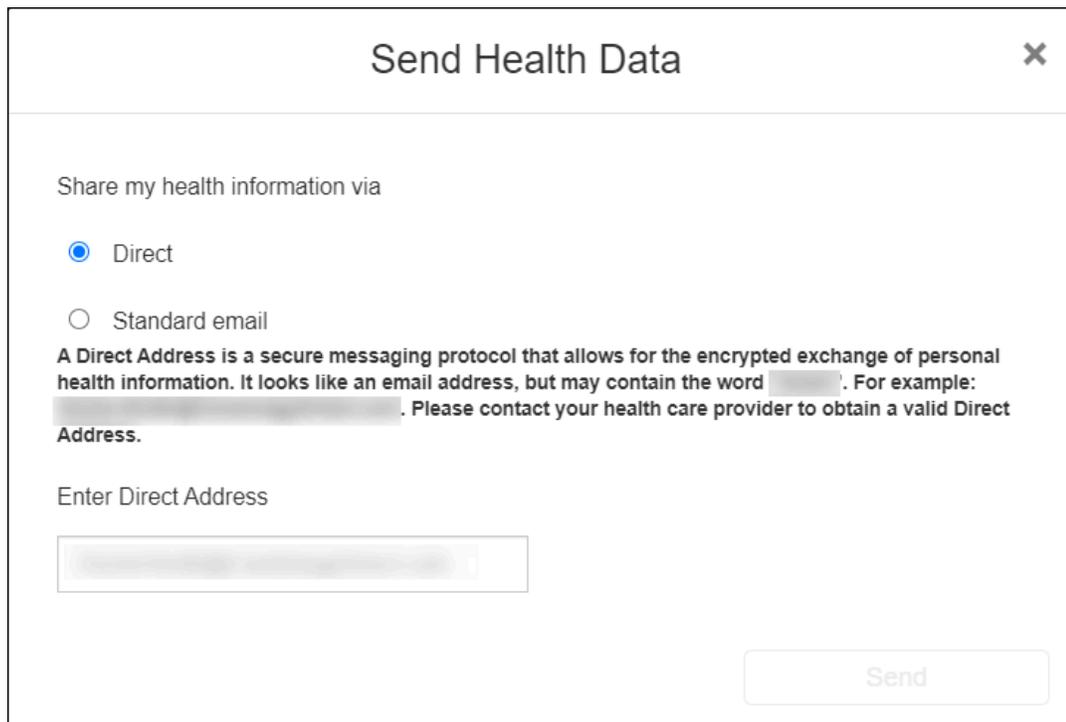
The health record summary page opens on the **Clinical summaries** tab.

3. Select the check box next to the health records that you want to share.

 **Note:** To select all the health records, select the check box next to **Date**.



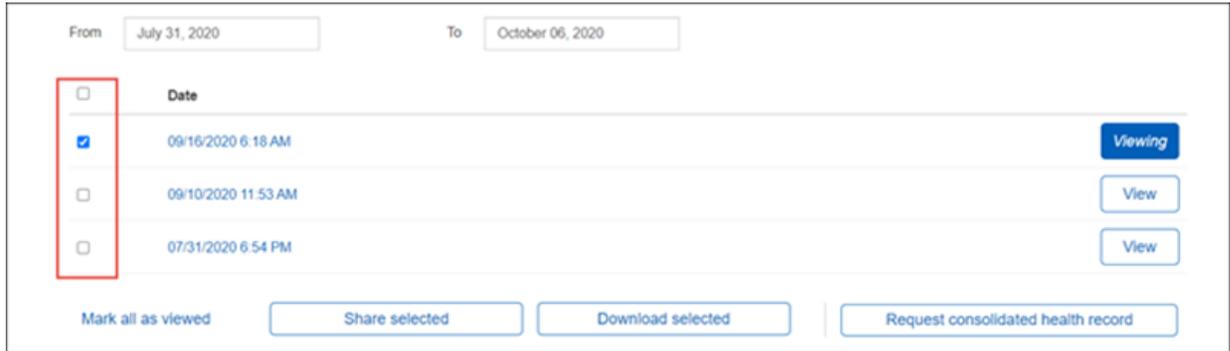
4. Click **Share selected**.  
The **Send Health Data** page opens.



5. Select one of the following:
  - **Direct**. This sends the patient's health information to the email address provided by the doctor.  
 **Note:** The **Direct** option is a secure messaging protocol that allows the encrypted exchange of personal health information. The **Enter Direct Address** email address may contain the word "direct".
  - **Standard email**. This sends the patient's health information to the standard email address of the doctor.  
 **Note:** The **Standard email** option has a non-secure email address and can be intercepted and read by others. To continue, the patient must select the check box to acknowledge that they understand and accept the risk.
6. Click **Send**.

## Download Personal Health Record

1. Open NextGen PxP Portal.
2. Click **Health Record**.  
The health record summary page opens on the **Clinical summaries** tab.
3. Select the check box next to the personal health record that you want to download.



The screenshot shows a web interface for viewing health records. At the top, there are two date input fields: 'From' with the value 'July 31, 2020' and 'To' with the value 'October 06, 2020'. Below these is a table with three rows. Each row has a checkbox on the left, a 'Date' column, and an action button on the right. The first row's checkbox is checked and highlighted with a red box. The action buttons are 'Viewing' (blue), 'View' (light blue), and 'View' (light blue). At the bottom of the table, there are four buttons: 'Mark all as viewed' (blue), 'Share selected' (light blue), 'Download selected' (light blue), and 'Request consolidated health record' (light blue).

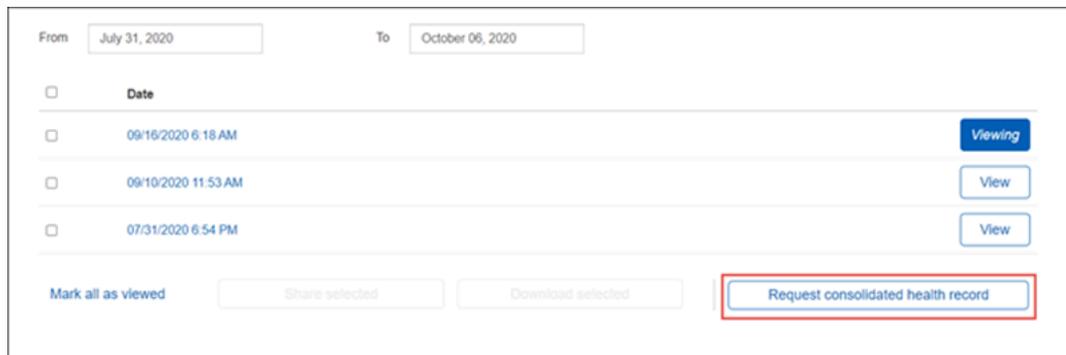
| <input type="checkbox"/>            | Date                | Action  |
|-------------------------------------|---------------------|---------|
| <input checked="" type="checkbox"/> | 09/16/2020 6:18 AM  | Viewing |
| <input type="checkbox"/>            | 09/10/2020 11:53 AM | View    |
| <input type="checkbox"/>            | 07/31/2020 6:54 PM  | View    |

Buttons: Mark all as viewed, Share selected, Download selected, Request consolidated health record

4. Click **Download selected**.  
A zipped folder gets downloaded. Unzip the folder to view the Personal Health Record in the pdf format.

## Request Personal Health Record

1. Open NextGen PxP Portal.
2. Click **Health Record**.  
The **Clinical summaries** tab of the health record summary page opens.
3. Click **Request consolidated health record**.



The screenshot shows the same web interface as the previous one, but with the 'Request consolidated health record' button at the bottom right highlighted with a red box. The other elements, including the date filters, table of records, and other buttons, are the same.

| <input type="checkbox"/> | Date                | Action  |
|--------------------------|---------------------|---------|
| <input type="checkbox"/> | 09/16/2020 6:18 AM  | Viewing |
| <input type="checkbox"/> | 09/10/2020 11:53 AM | View    |
| <input type="checkbox"/> | 07/31/2020 6:54 PM  | View    |

Buttons: Mark all as viewed, Share selected, Download selected, Request consolidated health record

The **Request updated health records** page opens.

### Request updated health records ✕

Select a date range for your requested health records from

From

To

or

Request complete record.

**Request Record**

4. Do one of the following:
  - To get Personal Health Record for a specific time period, enter the **From** and **To** dates.
  - To get a consolidated Personal Health Record, select the **Request complete record** check box.
5. Click **Request Record**.

A message appears indicating that the request is being processed by the practice.

## CHAPTER 17

# Patient Education

In NextGen PxP Portal, patients can access CareNexis Engage™ health education topics such as condition overviews, articles or videos for condition definitions, diagnostics, causes, prevention, and treatment options.

Health education topics are personalized for a patient based on a pre-selected search that renders relevant context for the condition or diagnosis code that has been saved to the patient's chart. Patients can also search for a health education topic by name or explore various categories in the CareNexis Engage library to find the required topic.

To provide a personalized content match for patients, standard codes represented in the patient's consolidated health record (CCD) such as SNOMEDCT, ICD9CM, ICD10CM, and NUCC are mapped to industry standard content, such as Healthwise®.

## Access Patient Education Material

### Before You Begin

- Ensure that Patient Education solution is enabled in Site Generator.

For more information, go to [NextGen Healthcare Success Community](#), and download the latest *User Guide for Site Generator*.

- Ensure that NextGen Patient Portal CCD services are installed.

For more information, go to [NextGen Healthcare Success Community](#), and download the latest *NextGen Patient Portal CCD Service User Guide for NextGen PxP Portal*.

Patients can access personalized health education materials from NextGen PxP Portal.

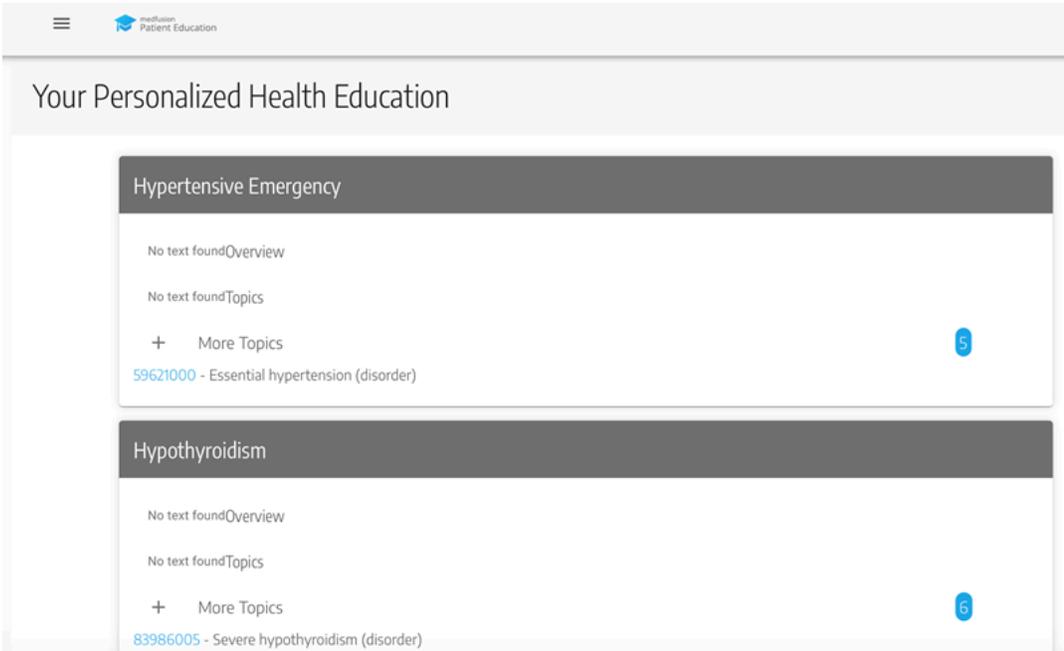
1. In NextGen PxP Portal, do one of the following:

- In the left pane, click **Patient Education**.
- In the NextGen PxP Portal dashboard, click **Patient Education**.
- In the NextGen PxP Portal dashboard, click **Health Record**, and then click **Patient Education**.

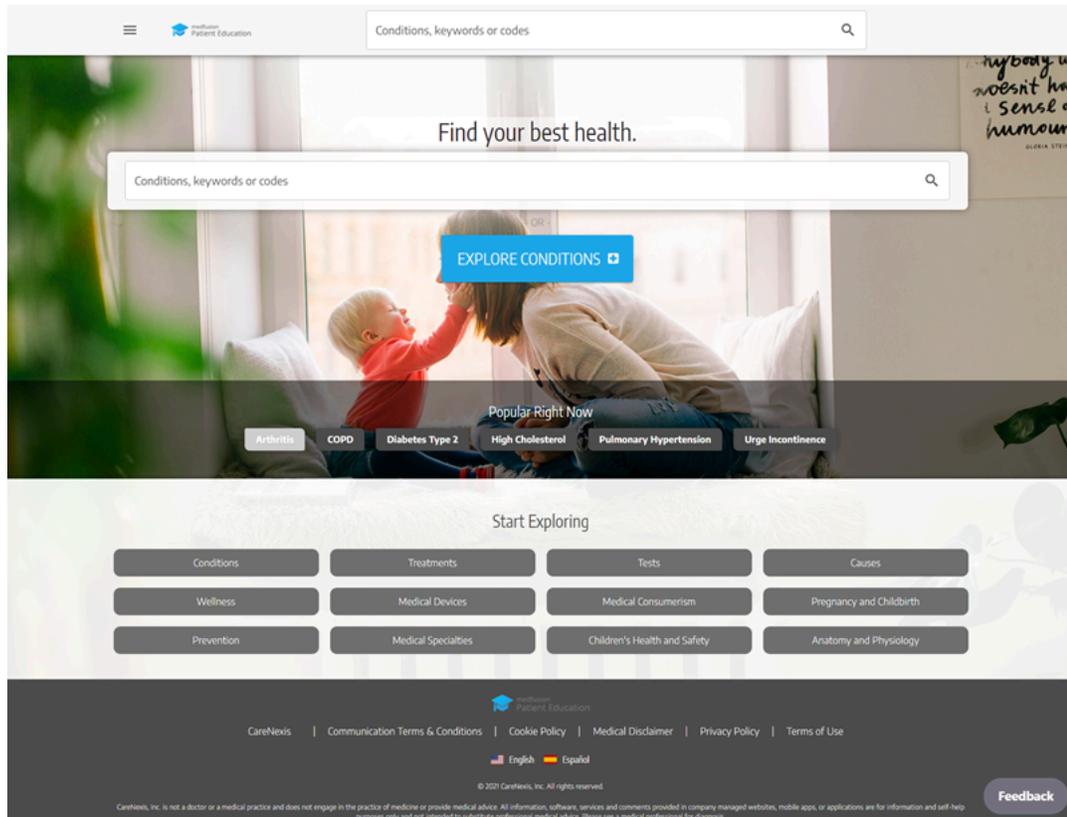
A window opens with options to launch patient's personalized health education topics.

2. Click **Launch My Education**.

The personalized health education topics for the patient open on a new tab.



The topics appear based on the problems added in the patient health record. If there are no known problems in the patient health record, the patient education library opens where the patient can search for a health education topic or explore various categories to find the required health education topic.



# Document Revision History

| Application Version | Date       | Document Version | Summary of Changes |
|---------------------|------------|------------------|--------------------|
| 21.5.2              | 08/18/2021 | 1.0              | General release    |

[Please take a few minutes to provide your feedback on the experience you have had and your preferences on where our user assistance can move in the future to serve your needs better.](#)

Thank you in advance for your valuable time. We appreciate all that you do!