This demonstration reviews usage of the NextGen Patient Portal. Details of the workflow will likely vary somewhat, depending on practice policy & clinic layout, though this should give you a good idea of NextGen functionality.

This has been prepared for EHR 5.8 & KBM 8.3, but you may see some screen shots of earlier versions in the background when they are not germane to the point being illustrated. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.
Introduction

• The NextGen Patient Portal was formerly known as “NextMD.” While they are moving away from this name, for the near future you will continue to see the two names used interchangeably at various spots in the program.

• Our initial usage of the portal will be somewhat basic, though more components will be added over the coming months.

• The primary advantage of using a patient portal is to provide a secure means of communication between patients and medical practices, which should be more efficient than playing “Phone Tag”—hopefully improving patient care, as well as patient & provider satisfaction.
Introduction

• The Patient Portal originated as a separate program component, so sometimes it feels a little “cobbled on.” This is getting better, but sometimes the workflow is a bit different from the general tasking workflow—and this presents the potential for confusion for infrequent users.

• There are still some Ghosts in the Machine. While the Patient Portal isn’t perfect, it is usable as a step toward a more capable & user-friendly portal in the future.

• The portal is currently only activated for Family Medicine as a running trial. The ultimate direction the HSF takes regarding patient portals in the outpatient & inpatient settings remains to be fully determined.
Enrollment

The enrollment process will be handled primarily by the front office staff. Patients can be given enrollment information at the time of a visit, or over the phone—meaning that a new patient can enroll before the first visit, allowing the patient to enter medical history information ahead of time.
To begin the enrollment process, open the patient in NextGen & use the **File** menu as illustrated, clicking **Manage Enrollment**.
A unique Password Token will be generated for each patient. This can be printed or written down for the patient, or given to the patient over the phone. Tell the patient to watch for an Email with instructions on completing the enrollment process.

Enter the patient's Email address.
You have been enrolled in NextMD.

Your enrollment token is: 467-37-429. To protect the privacy of your medical information this token should be kept secret. You will be required to enter this token to complete your enrollment. Once the enrollment process is complete, you will no longer need it.

You must complete the online enrollment process within 30 days or your enrollment token will expire.

If you are new to NextMD, complete your enrollment by following these steps:

1. Follow the link below to NextMD: https://www.nextmd.com/Enroll
2. Enter your enrollment token 467-37-429 and your email address rlduffy@usouthal.edu. Verify that your email address is correct; otherwise you will not be able to enroll in NextMD. Contact your practice if your email address is incorrect.
3. Choose a user name and password. Your user name and password are case sensitive. Your user name must be at least 6 characters long and cannot be more than 20 characters long. Your password must be at least 6 characters long, cannot be more than 20 characters long, and must contain at least one number.
4. Choose a Login Security Question from the list and provide your answer for this question. Since your NextMD account contains confidential medical information that must be protected you will have to provide the answer to the Login Security Question whenever you log into NextMD.
5. Set up NextMD's secure password reset feature. NextMD will ask you to select a question and provide an answer to it. If you forget your password, you will have to answer this question again to reset it.

If you already have a NextMD account, you can enroll in multiple practices by following these steps:

1. Follow the link below to NextMD: https://www.nextmd.com/
2. Login to the NextMD website using your original user name and password. Your user name and password are case sensitive.
3. From the Menu on the left, under My Account, click the Manage Practices link to go to the multiple practice enrollment page.
4. Enter your newly assigned enrollment token 467-37-429 and your email address. Verify that your email address is correct; otherwise you will not be able to enroll in NextMD. Contact your practice if your email address is incorrect.
Notice:

As of the installation of KBM 8.3.6 on June 28, 2014, importing of online forms from patients is broken, so we should suspend sending online medical history forms until further notice.

NextGen has not been particularly helpful in correcting this flaw.

I’m leaving the instructions about online forms in place in hope that this problem is rectified soon.
For new patients who you are enrolling for an initial visit in the future, we want to send them some medical history forms to complete before that visit. Click Add.
Different practices may use various sets of forms in the future. Click the + sign to expand Online Forms. (You may have to clear the Send default attachments only checkbox if the selections appear grayed-out.)

For this example, in Family Medicine, we'll check New Patient Forms-FM to send this set of forms.

Click OK then OK again to complete the process. The patient will receive some basic medical history forms to complete before the visit, speeding up the sign-in process on the day of the visit.
The patient will go to www.NextMD.com and follow simple instructions to create a logon and password known only to the patient. When enrollment has been completed, enrollment status will change to Enrollment Completed.
Children can be enrolled in a few ways. If the parent is not enrolled in the Patient Portal, the child could be enrolled as above, with the parent providing the Email address. The parent could then complete the enrollment on behalf of the child. This will often be the simplest procedure to follow.
Children can also be linked to their parents & other authorized caregivers during the enrollment process. Click **Add Care Manager**, then search for the parent. When located, double-click on the name.
The parent’s name & portal enrollment status now display. Additional parents/caretakers can be added.
This can also be done the other way around. Starting with an enrolled parent, you can click Add Dependant, then search for & select the child. An enrollment token will be generated for the child, to be given to the parent to complete the process. At the NextMD web site, the parent will be able to communicate with the practice about herself, & also about her child.
These Add Care Manager & Add Dependant options are available mainly for convenience & to speed the enrollment process for the staff when the patient wants to enroll multiple family members at once. It should be made clear to the parents that each patient, whether child or adult, has his/her own enrollment. If the mother is going to use the portal to ask a question about her child, she would log on to the portal using the child’s log on information.

Note that you could establish similar care manager/dependant relationships in other situations, e.g., between a demented/disabled senior & a caretaker daughter.
Viewing Portal In Workflow

Users may need to make some configuration changes in the Workflow/Inbox to see Patient Portal messages. You also need to be able to tell when the patient is enrolled in the Patient Portal.
With the Patient Portal activated, users will reconfigure their Work Flow windows to include NextMD messages. If necessary, right-click on the Title Bar & choose Window Configuration.
Choose one of the 3-box configurations, then click OK.
Make sure **NextMD** is selected here.
When you have a patient’s chart open, you can tell that the patient is enrolled in the Patient Portal by looking at the NextMD status on the Information Bar.
Sending Forms and Documents

As mentioned above in the enrollment process, various forms & documents can be sent to the patient via the Patient Portal. This may be performed by the front office staff, nurses, or providers.
Reminder:

As mentioned above, the KBM 8.3.6 upgrade on June 28, 2014 broke importing of online forms.

We’ll let you know when NextGen has restored this functionality.
Suppose we want to send some history forms to a patient. Use the File menu as illustrated, clicking **Send Online Form**.

For patients who have completed the enrollment process, you can use the File menu to send forms and documents.

Suppose we want to send some history forms to a patient. Use the File menu as illustrated, clicking **Send Online Form**.
In the next window we’ll select **New Patient Forms-FM**, then click **OK**. The patient will receive an Email asking her to log on to NextMD to view & complete the form.
You can also send the patient any document generated within NextGen. Use the File menu as illustrated, clicking Send EHR Document.
Browse through encounters, select the desired document(s), then click **OK**. The patient will receive an Email telling her to log on to NextMD to receive the document (which can be printed or saved as a PDF).

Note that one good use for this is to transmit the **Patient Plan** to the patient. While Meaningful Use requirements state that patients are to receive such summaries after every visit, many providers find the workflow of printing this before the patient leaves difficult. But these requirements are also met if the summary is sent via the portal within 3 business days.
From the **History Bar**, there is a simpler way to send a document to a patient. Right-click on the **document**, then choose **Send to Patient Portal**...

You can type a message if desired, then click **Send**. A confirmation then displays.
Finally, note there is another option under the NextMD menu called **Interactive Medical Forms**. We are not using these at this time.
Receiving & Reviewing Forms

When a patient returns a completed form via the Patient Portal, this will need to be imported to the chart by the staff, & reviewed by staff and/or providers in the clinic.
Once again:

The KBM 8.3.6 upgrade on June 28, 2014 rendered importing of online forms dead in the water.

Don’t you love it when an “upgrade” is a major step backwards?
Let's say the Triage Nurse receives notice about an Online Form in the Patient Portal Online Forms Inbox. The nurse may wish to begin by clicking the (go to) Chart Button. This would be particularly necessary if you wanted to figure out who the PCP is, e.g., to send a task to the PCP that the Online Forms have been received.
You could then send a task to the provider notifying him about the Online forms. Click + To Do, then select the provider in the popup by clicking Assign To.
On the ensuing popup, in the **Search users and groups** box, type the name (e.g., **Duffy**) & click **Search**.
When the search results display, select the correct user & click **Add**.

The recipient will appear on the list on the right. When done click **OK**.

In the final screen click **Add**.
But whether or not you send a task to the provider, & whether or not you’ve opened the patient’s chart, the nurse’s main goal is to **import** the Online Form. Open the form by double-clicking on the entry (or selecting it & clicking + to Chart).
A list of submitted forms appears on the left.

You can choose to import the forms to a specific encounter, or just allow the program to create a new encounter.
The forms can be accepted one at a time, but the Triage Nurse’s main task is to **import** the forms. So the easiest thing to do is click **Accept & Import All**.
The forms are imported & posted to the patient’s chart, & this item drops off the nurse’s NextMD Inbox. Note you don’t even have to have the patient’s chart open to perform this importation.
When the provider opens the chart, either in response to a task, or during the first visit with the patient, the **Patient Portal forms** (actually templates) can be seen on the encounter.
Select each template and review the entries. The general rule is that NextGen tries to import anything from a check box into the appropriate part of the chart, while anything in a Comments Box will have to be manually entered by the user.
Yes answers on the Health Maintenance Portal template will be imported to the Order_Management template—though sometimes the details will be incomplete.
Positive checkboxes in the Allergy section of the Medications and Allergies Portal template will be imported to the Allergy Module. You will have to enter other allergies & the medication list manually.
Most of the answers on the Social History Portal template will be imported to the Social History template—though you’ll want to double-check this. As of this writing, there appears to be some inconsistency as to how the tobacco details are imported.
Most of the check boxes on the Chronic Illnesses template will be imported to the Chronic Problem List. You'll have to enter anything the patient typed in the Additional Chronic Illnesses box manually.
To reiterate:
NextGen imports many of these items the best it can, but the import process is often incomplete, & the transition to KBM 8.3 in 2014 may further complicate the picture. It is still the provider’s responsibility to review these templates & make any manual additions or clarifications necessary when seeing the patient.

Obviously, we’re still ahead of the game at the first visit if the patient has been able to submit this information ahead of time, instead of having to fill out paper forms that have to be reviewed & added to NextGen at the time of the visit.
Medical Questions

Patients can send us medical questions, & we can respond through the Patient Portal.
Incoming medical questions will probably be routed to specific users in each clinic, such as a Triage Nurse Group. The Triage Nurse will see the message in the NextMD Communications Inbox.

Some clinics may have established rules that allow the nurses to answer many of these questions. If so the nurse will probably want to begin by clicking Chart to review information necessary to answer the question.
In other clinics, or in other circumstances, however, the nurse may need to refer the question to a provider. In this case, let’s say the nurse has reviewed the chart, & needs to send the question to Dr. Duffy. Begin by double-clicking on the message.
Notice this looks more like conventional Email than the regular tasking function within NextGen. Click the **Forward** button.
Search for **Duffy**. When the result displays, select it, then click **OK**.
Whether the question is being answered by the nurse or the provider, the process is the same. But before we respond to the question, note the Complete button. If your actions will complete this Portal Task, you may wish to click this button now—note this is a little different from the way you flag regular tasks as “complete.”

Now note the Reply button and click the Dropdown Arrow. You can choose to send the reply to the patient or to the user who sent you the question. In this case, we’ll select To Patient.
Click **Send & Chart**. This will send the response to the patient via the NextMD Patient Portal, & add this note to the chart. Clicking the **Dropdown Arrow** will give you some other choices, which we'll review in a few minutes.
Here you see the message that has been added to the encounter.
If you didn’t do it earlier, you can mark this item as “complete” by double-clicking on the message.
Click the **Complete** button.
The message has now dropped off your list.
Messages To Patients

Providers & nurses can, of course, initiate messages to patients. This is a good way to relay lab results, follow-up plans, give appointment reminders, etc.
To initiate a message to a patient, with the patient’s chart open, bring up the Workflow popup & click **Compose**.
Click To & you’ll see the patient’s name at the top of the list. Click the patient’s name.
Add a subject & type your message.

To: TestDuffy. AdultFemaleNxMD02
Subject: Test Results
From: Robert Duffy

Ms. XXXXX,
Your cholesterol studies came back great. Continue your current simvastatin dose, & plan on a visit in 6 months as we discussed.

RL Duffy
Note the **Send** button. You would almost always want to chart these communications, so **DO NOT USE THIS BUTTON.**

Instead, note the **Send & Chart** button. This is the button you want to use, but notice it is actually 2 buttons side by side. If you just click **Send & Chart**, it will add the message to a new encounter & immediately lock it. And there's nothing wrong with that, though it clutters the encounter list a bit with multiple locked encounters.
However, if you click the dropdown arrow, you will have the choice of adding it to a locked or unlocked encounter. “Unlocked” (or an existing encounter when offered) is probably the better choice; it allows you to add other documentation to the encounter, & you can use the same encounter for further entries in this line of conversation.
After sending the message, you’re returned to the Workflow popup.

Note that communicating tests results this way can save you additional work, since there would be no reason to duplicate the effort on the Telephone or Provider Test Action template, or send tasks to other staff to attempt to contact the patient.
Medication Refill Requests

Patients can request refills through the Patient Portal. This works in a way similar to Medical Questions.
Incoming refill requests will probably be routed to specific users in each clinic, such as a Triage Nurse Group. The Triage Nurse will see the message in the NextMD Prescriptions Inbox.

Many clinics may have established rules that allow the nurses to refill some routine meds. If so, the nurse will probably want to begin by clicking Chart to review information necessary to answer the question.
In other clinics, or in other circumstances, however, the nurse may need to refer the question to a provider. In this case, let’s say the nurse has reviewed the chart, and needs to send the refill request to Dr. Duffy. Begin by double-clicking on the message.
Click the **Forward** button.
Search for **Duffy**. When the result displays you can add further details if desired in the **Message** section, then click **Send** to forward the request.
Whether the question is being answered by the nurse or the provider, the process is the same. Click **Respond**.
You can click here to toggle between “Approved” & “Denied.”

You can type further messages here.
Click **Send & Chart**. This will send the response to the patient via the NextMD Patient Portal, & add this note to the chart. Clicking the **Dropdown Arrow** will allow you to choose a specific encounter to add it to, or to create a new encounter to add it to.
Here you see the message that has been added to the encounter.
The program knows whether you’ve read or replied to the requests, & will “complete” the task for you when you’ve replied. Though somewhat inconsistent with tasking behavior elsewhere, it saves you from having to manually mark the task as “complete.” If you right-click in the Prescription Inbox, you can choose whether or not to display “Read” or “Replied-To” items. If these are unchecked, the item drops off your list when you’ve read/replied to it.
Note that just responding to the request doesn’t actually generate the prescription. You still need to go to the **Medication Module** to refill & ERx (or print/fax) the prescription.
This concludes the NextGen Patient Portal demonstration.

If everything seems to be going well, you have obviously overlooked something.

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