



Planned Parenthood Mar Monte

# **NextGen® Patient Portal User Guide Version 5.7**

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# Chapter I

## Introduction

This chapter provides an overview of the NextGen Patient Portal Web site and its requirements and other related information.

## About This Guide

The NextGen Patient Portal User Guide explains how to use the features and functions found on the NextGen Patient Portal Web site. It is intended for patients enrolled to use the NextGen Patient Portal Web site.

## Assumptions

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

## Overview

The NextGen Patient Portal is a consumer-oriented healthcare Web site that provides you with a fast, reliable, and an easy-to-use method of communicating with Planned Parenthood Mar Monte. With NextGen Patient Portal, you can connect with Planned Parenthood Mar Monte through a convenient, safe, and secure environment to:

- ❖ Request appointments
- ❖ Receive and review documents
- ❖ Send and receive secure messages to and from our nurses
- ❖ Request Personal Health Records (PHRs)
- ❖ Update account information

## Web Browser Requirements

NextGen Patient Portal works best with Microsoft Internet Explorer 6.0 and higher or Mozilla Firefox 2.0 and higher versions with 128-bit Secure Sockets Layer (SSL) encryption.

Most browsers which are currently available support the 128-bit SSL encryptions (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 the **About** option. If your browser does not support 128-bit encryption, please visit the respective company Web site that provides upgrades to your browser software.

## Internet Security

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

- ❖ Choose a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive, must be between 6 and 20 characters and can include numbers and 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 as you.
- ❖ 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** link at the top-right corner of the NextGen Patient Portal Web site. 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 anti-virus program and make use of a firewall
- ❖ You should not leave your system unattended while logged in. If you have to leave your system unattended, log out of all programs and close all windows that might display sensitive information. NextGen Patient Portal automatically logs you out if there has been no online activity for 20 minutes.

## Email Notifications

Anytime Planned Parenthood Mar Monte 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.

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

## Chapter 2

### NextGen Patient Portal Enrollment

The enrollment process is a means of signing up for your NextGen Patient Portal account which provides access to your personal and medical information on the NextGen Patient Portal Web site.

#### Enrolling in NextGen Patient Portal

You must first contact Planned Parenthood Mar Monte to enroll in NextGen Patient Portal and provide them with your name, address, phone number and email address. In turn, Planned Parenthood Mar Monte will send you an email that contains a link to their NextGen Patient Portal Web site.

At the health center, we will provide you with an eight-digit token number to access your NextGen Patient Portal account, which is valid for 30 days. If you have not enrolled in NextGen Patient Portal within this period, contact Planned Parenthood Mar Monte to obtain a new token number.

**Note:** If you already have a NextGen Patient Portal account and are trying to enroll with the reset password provided by Planned Parenthood Mar Monte, you will be redirected to the Password Reset page of the NextGen Patient Portal site.

#### To enroll in NextGen Patient Portal:

1. Open the “Welcome to NextGen Patient Portal!” email sent from Planned Parenthood Mar Monte and click the **Click here to go to NextGen Patient Portal** link.

Your Internet browser opens and displays the terms and conditions for using the NextGen Patient Portal Web site.



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

**Note:** Clicking **I Do Not Accept** directs you to the My Health Login page.

The Submit your Enrollment Validation form displays

**Submit your enrollment validation**

**FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Please enter your security token and your email address. Your enrollment token is an eight digit number provided by your practice. Once security token and email address have been validated, you will be able to create your NextGen Patient Portal account. If you have not received an enrollment notification email, please contact your practice. Asterisk (\*) denotes required field.

\* Enter security token:  [What is security token?](#)

\* Enter email address:

**Submit** **Cancel**

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

The Create enrollment credential form displays

4. In the **Create your username and password** section, type the user name and password you will use to log in to NextGen Patient Portal and then retype your password in the fields provided.

**Create enrollment credentials**

**FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

**1 Create your username and password**  
Enter a user name and password you want to use when you login to NextGen Patient Portal. Asterisk (\*) denotes required field.

\* User name:   
User name must be between 6 - 20 characters and is case sensitive.

\* Password:   
Password must be between 6-20 characters which can be a combination of letters, numbers and special characters and is case sensitive.

\* Retype password:

All fields are required. User names and passwords are case sensitive and must be between 6 and 20 characters. Passwords must contain at least one number.

As you type your password, a password strength indicator displays. Use mixed-case letters, numbers, and punctuation characters to increase the password strength.

5. In the **Create your login security information authorization** section, select a security **question** and then enter and retype your **answer** in the fields provided. The question and answer is part of your login procedure to access the NextGen Patient Portal.

**2 Create your login security authorization**

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (\*) denotes required field.

\* Select a question:

\* Enter your answer:

\* Retype your answer:

6. In the **Create your password recovery credentials** section, enter a question and answer that you will use to reset your password and then retype your answer in the fields provided.

**3 Create your password recovery credentials**

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (\*) denotes required field.

\* Create a question:

\* Enter your answer:

\* Retype your answer:

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



Your NextGen Patient Portal Account page displays. It consists of two main elements: a navigation pane (on the left) and a contents pane (on the right).

The screenshot shows the NextGen Patient Portal interface. At the top left is the logo "NEXTGEN Patient Portal". Below it is a navigation pane with sections: Home (with a search icon), My Practices, My Appointments, My Medical Record, Mail (with sub-items: Inbox, Sent Items), Tasks (with sub-items: Compose Message, Request Appointment, Request Health Record, Research Center), and My Account (with sub-items: Account Settings, My Information, Manage User Grants, Manage Practices, Statement Notifications). The main content area has a header with "Home", "Inbox", "Sent Items", and "My Account" tabs. A welcome message reads: "Welcome: Leslie Taylor, Last logged in: 5/5/2014 10:21:50 AM | [Logout](#)". Below this is a breadcrumb trail: "My Practices | My Appointments | My Medical Record" and a "Research Center" link. The main content is divided into three columns. The left column is titled "Planned Parenthood Mar Monte" and contains a "Welcome to NextMD!!!!" message, a "Contact Information" box for Planned Parenthood Mar Monte (1691 The Alameda, San Jose, CA 95126), and a link: "You have (32) new items. click here to view". The middle column is titled "Appointment Reminders (0 Items)" and has an "Expand" link. The right column is titled "Alerts (0 Items)" and has an "Expand" link.

**Tip:** For easier access next time, add the NextGen Patient Portal Web site 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.

### Logging In to Your NextGen Patient Portal Account

To log in to your NextGen Patient Portal account:

1. Access the NextGen Patient Portal Web site.

The My Health Login form displays

NEXTGEN<sup>®</sup>  
Patient Portal

English ▾

Welcome to Patient Portal, your medical home on the Web. With Patient Portal, you can connect with your doctor through a convenient, safe, and secure environment.

You have successfully logged out of Patient Portal.

**Already a member?**  
Welcome!  
Please note that the user name and password fields are case sensitive and the password must contain at least one number.

Password

[Need help with your user name and password?](#)

**LOG IN**

**New Here?**  
Register below!

✓ New to Patient Portal?

✓ Have an enrollment token?

- Exchange secure messaging with your doctors
- Request medication renewals
- Request appointments
- Access your health record

**ENROLL NOW**

[I am not receiving email notifications](#)


Your security is important. We use technology to encrypt, safeguard, and secure your personal information. Please view our [Privacy Policy](#) for more information

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

**Note:** If you fail to log in to your NextGen Patient Portal account after four times with an incorrect password, the system locks your account. However, the system will automatically unlock your account after 20 minutes.

### The Answer your security question form displays

**Answer Your Security Question**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Who is your favorite singer?

**Submit**

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

Your NextGen Patient Portal Account page displays. It consists of two main elements: a navigation pane (on the left) and a contents pane (on the right). Your “logged in” name appears in the upper right corner along with the last logged in time.

**NEXTGEN**  
Patient Portal

Home | Inbox | Sent Items | My Account

Welcome: Leslie Taylor, Last logged in: 5/5/2014 10:21:50 AM | [Logout](#)

My Practices | My Appointments | My Medical Record | [Research Center](#)

**Planned Parenthood Mar Monte** [Collapse](#)

Welcome to NextMD !!!

**Contact Information**  
Planned Parenthood Mar Monte  
1691 The Alameda  
San Jose, CA 95126

[You have \(32\) new items. click here to view](#)

Appointment Reminders (0 Items) [Expand](#)

Alerts (0 Items) [Expand](#)

**Navigation Pane:**

- Home
- My Practices
- My Appointments
- My Medical Record
- Mail
  - Inbox
  - Sent Items
- Tasks
  - Compose Message
  - Request Appointment
  - Request Health Record
  - Research Center
- My Account
  - Account Settings
  - My Information
  - Manage User Grants
  - Manage Practices
  - Statement Notifications

## Contents Pane

The NextGen Patient Portal Web site contains a Contents pane on the right side that enables you to access all the pages in the NextGen Patient Portal Web site using the tabs and links located at the top of each page.

Home | **Inbox** | Sent Items | My Account | Welcome: Leslie Taylor, Last logged in: 5/5/2014 10:30:27 AM | [Logout](#)

[My Practices](#) | [My Appointments](#) | [My Medical Record](#) | [Research Center](#)

**Planned Parenthood Mar Monte** [Collapse](#)

Welcome to NextMD !!!!

**Contact Information**  
Planned Parenthood  
Mar Monte  
1691 The Alameda  
San Jose, CA 95126

[You have \(32\) new items. click here to view](#)

**Appointment Reminders (0 Items)** [Expand](#)

**Alerts (0 Items)** [Expand](#)

The tabs are organized into the following categories:

### Home

By default, this tab is displayed when you successfully log on to the NextGen Patient Portal Web site. It displays a link to new items in the Inbox, contact information alerts, and appointment reminders. You can also click links to view your appointments and medical health record.

### Inbox

Select this tab to view all the items (messages, document, etc.) that you received from Planned Parenthood Mar Monte.

### Sent Items

Select this tab to view all the items (messages, documents, etc.) that you sent to Planned Parenthood Mar Monte.

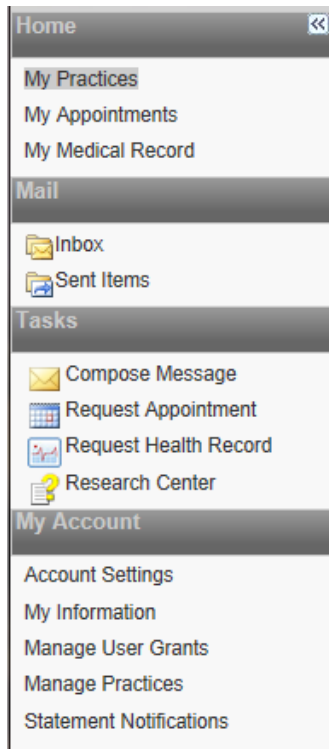
In addition, you can click the links to send messages to Planned Parenthood Mar Monte, generate Personal Health Records, and request appointments.

### My Account

Select this tab to manage your NextGen Patient Portal account information. You can click links to update your account information, update your personal information (name, address, email, etc.)

## Navigation Pane

The NextGen Patient Portal Web site contains a navigation pane on the left side that enables you to access all the pages on the Web site.



The links are grouped by functionality into the following categories:

### Home

Enables you to access alerts and appointment reminders. You can also click links to view your appointments and medical health record.

### Mail

Enables you to view all messages and items received from Planned Parenthood Mar Monte, and view all messages and items that you've sent.

### Tasks

Enables you to compose messages, request personal health records and research medical topics.

### My Account



Enables you to set up and manage NextGen Patient Portal account information and personal information.

**Note:** If you change your address or phone number on the NextGen Patient Portal it WILL NOT be changed in the Planned Parenthood Mar Monte system. Please always change your information when you visit our health centers.

### Showing/Hiding the Navigation Pane

Because of the dual Web navigation controls, you can choose to hide the Navigation pane to simplify the interface.

In the top-right corner of the Navigation pane there is a double arrow icon that enables you to show or hide the Navigation pane. By default, the Navigation pane displays.

Icon	Function
	Click this icon to show the Navigation pane
	Click this icon to hide the Navigation pane

### Locked Accounts

You cannot access your NextGen Patient Portal account:

- ❖ If you fail to log in to your NextGen Patient Portal account with four continuous failed attempts (with an incorrect password), the system locks your account. However, the system automatically unlocks your account after 20 minutes.
- ❖ If you cannot remember your user name and/or password, click the **Don't remember your user name or password?** link and follow the instructions.

### Logging Out of Your NextGen Patient Portal Account

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



If NextGen Patient Portal Web site does not detect any activity for more than 20 minutes, the system automatically logs you out.

**Recommendation:** Planned Parenthood Mar Monte recommends that you log out before exiting the NextGen Patient Portal Web site. Logging out of the Web site properly shall provide better security for you, as well as your medical records.

## User Name and Password Recovery

If you cannot log on to your NextGen Patient Portal account site because you forgot your user name and/or password, click the **Don't remember your user name or password?** link to:

- ❖ Reset your password
- ❖ Recover a forgotten user name

**Note:** If you have already registered on the NextGen Patient Portal site and try to use the token in the Enroll Patient page to register, the following message displays and on clicking **Continue**, you shall be redirected to Password Reset page in the NextGen Patient Portal site.

The security token you are using was issued by Planned Parenthood Mar Monte to enable a password reset process. Please continue to reset your account's credentials or cancel the operation and log in to your account.

### Resetting Your Password

**To reset a forgotten password:**


1. Access the NextGen Patient Portal Web site.

The *My Health Login* page displays.

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

The *Forgot your Login information?* form displays.

*Forgot your Login information?*

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

*Help us to locate your Patient Portal account - We'll use the information below to find your account in our records.*

**I have my user name**

Please enter your user name.


User name:

3. Enter your **User name** and click **Next**.

**Note:** If you cannot remember your user name, click the **I'm having problems signing in** radio button and enter the appropriate information to obtain it.

The *Reset your credentials* form displays.

**Reset your credentials**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

To reset your credentials, answer your forgotten password security question. An email will be sent containing a URL for you to reset your password. The forgotten password security answer is not case sensitive.


favorite singer:

**Submit** **Cancel**

**Answer your forgotten password security question and click Submit.**

A message displays, notifying you that an email has been sent with a link to reset your password.

**Reset your credentials**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

An email has been sent to you with a URL to reset your password. Please login to your email and click on the link to reset your password.


[Click here](#) to go back to login page.

4. Click **OK** to continue
5. In your email application, open the Password Reset email and click the **Forgot Password** link.



The *Reset login credentials* form opens and displays your user name.

*Reset login credentials*

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

Username: leslietaylor680

**Reset your password**

Enter a password you want to use when you login to NextGen Patient Portal. Asterisk (\*) denotes required field.

\* Password:

Password must be between 6-20 characters which can be a combination of letters, numbers and special characters and is case sensitive.

\* Retype password:

**Reset your login security authorization**

- In the **Reset your password** section, enter then retype your new **password** in the fields provided.  
All fields are required. Passwords are case sensitive, must be between 6 and 20 characters and contain at least one number.  
As you type your password, a password strength indicator displays. Use mixed-case letters, numbers, and punctuation characters to increase the password strength.
- Scroll to the **Reset your login security authorization** section.

**Reset your login security authorization**

Choose a login security question and enter your answer. This question will be used as part of the login authorization process. You will be prompted to enter the answer for your selected question when you try to login to your account. Asterisk (\*) denotes required field.

\* Select a question:

\* Enter your answer:

\* Retype your answer:

- Select a security **question** and then enter and retype your **answer** in the fields provided. The question and answer is part of your login procedure to access the NextGen Patient Portal.
- Scroll to the **Reset your password recovery credentials** section.

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

**Reset your password recovery credentials**

Create a forgotten password question and enter the answer. This question will be used in the password reset process. You will be prompted to enter the answer for this question in case you need to reset your password in the future. Asterisk (\*) denotes required field.

\* Create a question:

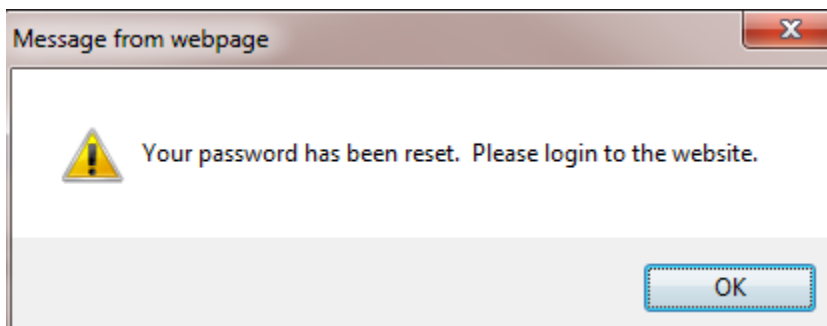
\* Enter your answer:

\* Retype your answer:

**Submit** **Cancel**

11. Click **Submit**

A message displays indicating that your password has been reset.



12. Click **OK** to continue

The My Health Login page displays.

The screenshot shows the My Health Login page with two main sections:

- Already a member?**
  - Header: **Already a member?**
  - Text: Welcome!
  - Note: Please note that the user name and password fields are case sensitive and the password must contain at least one number.
  - Fields: Username and Password input boxes.
  - Link: [Need help with your user name and password?](#)
  - Button: **LOG IN**
- New Here?**
  - Header: **New Here?**
  - Text: Register below!
  - Checkmarks: Two green checkmarks.
  - Text: New to Patient Portal?
  - Text: Have an enrollment token?
  - List:
    - Exchange secure messaging with your doctors
    - Request medication renewals
    - Request appointments
    - Access your health record
  - Button: **ENROLL NOW**

13. Log in using your user name and the new password.

## Recovering Your User Name

**To recover your user name:**

1. Access the NextGen Patient Portal Web site.

The My Health Login page displays.

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

The *Forgot your password?* form displays.

The screenshot shows the 'Forgot your Login information?' form with the following elements:

- Header: **Forgot your Login information?**
- Warning: **FRAUD WARNING** with a yellow warning icon. Text: Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.
- Text: Help us to locate your Patient Portal account - We'll use the information below to find your account in our records.
- Radio buttons:
  - I have my user name
  - I'm having problems signing in
- Section: **I have my user name**
  - Text: Please enter your user name.
  - Field: User name: [input box]
- Section: **I'm having problems signing in**
  - Text: Please enter your information so that we can locate your account.
  - Fields: First Name, Last Name, Email address, Date of Birth (mm/dd/yyyy), and Zip [input boxes]

3. Click the **I'm having problems signing in?** radio button.
4. Enter the information requested. Click Next.

The *Reset your credentials?* form displays

**I'm having problems signing in**

Please enter your information so that we can locate your account.

First Name:

Last Name:

Email address:

Date of Birth (mm/dd/yyyy):

Zip  -

---


**I have my reset token**

Please enter your email address and password reset token given to you by your practice.

Reset token:

Email address:

**Reset your credentials**

 **FRAUD WARNING**

Any person who knowingly with the intent to defraud any medical agency by concealing and filing false information for medical care or treatment may be found to have committed a fraudulent act which is a crime and may be subject to criminal and civil penalties.

An email has been sent to you with a URL to reset your password. Please login to your email and click on the link to reset your password.

[Click here](#) to go back to login page.

A message displays notifying you than an email has been sent to your email address with your user name.

5. Access the NextGen Patient Portal Web site to log in.

# Chapter 4


## Home

The Home page is the first page displayed when you successfully log into the NextGen Patient Portal Web site. It displays contact information, alerts and appointment reminders. You can click links to view new items, view your appointments and view and export your most recent personal health record.

## Alerts and Appointment Reminders

Planned Parenthood Mar Monte can send you alerts and appointment reminders that appear on the **Home** page.

Welcome: Devl Portal, Last logged in: 5/5/2014 1:29:37 PM | [Logout](#)

 [Research Center](#)

---

Appointment Reminders (3 Items) [Collapse](#)

<a href="#">5/6/2014</a>	8:45 AM	for Devl Portal
<a href="#">5/6/2014</a>	1:00 PM	for Devl Portal
<a href="#">5/6/2014</a>	1:15 PM	for Devl Portal

[See All](#)

---

Alerts (0 Items) [Expand](#)

Appointments scheduled within the next seven days appear in the **Appointment Reminders** section.

Click on a reminder to view the details. Click **See All** to view all appointments.

Home | **Inbox** | Sent Items | My Account

My Practices | My Appointments | My Medical Record

[Back](#) | [Remove](#) | [Print](#)

**This appointment is booked**

**Patient:** Portal, Devl  
**Date:** 5/6/2014 8:45 AM  
**Provider:** Planned Parenthood Mar Monte  
**Location:** Blossom Hill  
5440 Thornwood Drive  
Suite G  
San Jose  
CA,951231217

**Phone number:** (408) 574-1000  
**Type:** -HC

**Instructions:**  
Please bring your photo ID and insurance card to your appointment. Thank you, Planned Parenthood Mar Monte.

**Request history:**

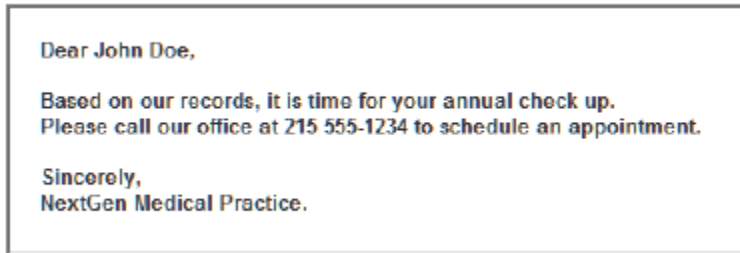
**I would like to:**

---

[Cancel This Appointment](#)  
[Reschedule This Appointment](#)

[Back](#) | [Remove](#) | [Print](#)

Event notices or events (such as yearly exams or upcoming lab tests) appear in the **Alerts** section. Click on an alert to view the details. Click **See All** to view all documents in the **Inbox**.



You can show or hide the **Appointment Reminders** and/or **Alerts** sections as needed by clicking the corresponding **Expand** and **Collapse** links that appear next to each header.

## My Appointments


Use the My Appointments feature to review current and past appointments.

### To use the My Appointments feature:

1. From either the **Home** page or navigation pane, click the **My Appointments** link.  
A list of upcoming appointments displays by default.

My Appointments

---

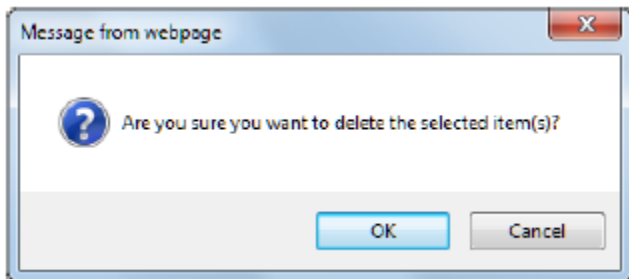
 Please make sure to arrive 15 minutes before your scheduled appointment.

Include past appointments Practice:  Patient:

<input type="checkbox"/>	Status	Patient	Provider	Practice	Location	Date
<input type="checkbox"/>	Booked	Portal, Devi	Planned Parenthood Mar Mon	Planned Parenthood Mar Monte	Blossom Hill	5/6/2014 8:45 AM
<input type="checkbox"/>	Booked	Portal, Devi	Planned Parenthood Mar Mon	Planned Parenthood Mar Monte	Blossom Hill	5/6/2014 1:00 PM
<input type="checkbox"/>	Booked	Portal, Devi	Planned Parenthood Mar Mon	Planned Parenthood Mar Monte	Blossom Hill	5/6/2014 1:15 PM

2. To view previous appointments, check the **Include past appointments** check box.
3. Click a column name (**Status**, **Patient**, **Provider**, etc.) to sort the list in ascending or descending order.
4. To navigate to other pages, click the page number (if available) at the bottom right of the page.
5. Click an appointment to view the details.
6. To delete an appointment from the list:
  - ❖ Select either the check box next to each appointment you want to remove or the select check box next to the **Delete** button to remove all items.
  - ❖ Click **Delete**

A confirmation message displays.



❖ Click **OK** to delete the item.

**NOTE:** Deleting an appointment here does NOT cancel your appointment at a Planned Parenthood Mar Monte health center. Please be sure to call us if you need to cancel your appointment.

## My Medical Record

A Personal Health Record (PHR) is an electronic summary of your health and medical history (allergies, medications, family history, etc.) than you can request from Planned Parenthood Mar Monte. When you receive your PHR, you can view it and save it to a storage device as a CD, smart card or USB flash drive.


### To view and export your most recent personal health record:

1. From either the **Home** page or navigation pane, click the **My Medical Records** link.

The *Request Personal Health* form displays.

If you have not requested a health record before, you can submit a request. Otherwise, the form displays the clinical history from your last request.

View Personal Health Record

Select Patient:   [View Audit History](#)

Clinical History As Of Wed 4/16/2014 7:02:53 PM GMT - Leslie Taylor-Planned Parenthood Mar Monte

	Medication	Instructions	Dosage	Effective Dates (start - stop)	Status	Comments
<a href="#">Demographic Info</a> <a href="#">Medications</a> <a href="#">Allergies</a> <a href="#">Immunizations</a> <a href="#">Problems</a> <a href="#">Procedures</a> <a href="#">Results</a> <a href="#">Payer</a> <a href="#">Family History</a> <a href="#">Social History</a> <a href="#">Vital Signs</a> <a href="#">Advanced Directives</a>	Unknown					

2. Select a category in the left pane (problems, family history, etc.) to view additional information.

## Chapter 5

### Mail

This chapter explains how to use the Inbox page which displays all incoming items and the Sent Items page which displays all outgoing items.

### Inbox

The Inbox displays all incoming items. You can access incoming messages and documents. From the Inbox, you can also click links at the top of the page to:

- ❖ Compose messages
- ❖ Generate Personal Health Records
- ❖ Request appointments
- ❖ View health topics

### Accessing Inbox items

#### To access Inbox items:

1. From your **Home** page, click the **You have new items, click here to view** link.
2. The number of new items appears in parenthesis.
3. You can also select the **Inbox** tab or click the **Inbox** link on the navigation pane.
4. By default all items displays. New items appear in bold type. The total number of items in your Inbox appears on the bottom left of the page.

Practice:	All	To:	All	Type:	All		
	Type	To	From	Subject	Practice	Received	
<input type="checkbox"/>	Booked Appt.	Leslie Taylor		-pills	Planned Parenthood Mar	4/28/2014	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell		Planned Parenthood Mar	4/28/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F002 Pill Card for Portal Patients.docx	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: bleeding	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: bleeding	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Pending Appt.	Leslie Taylor		depo shot	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Booked Appt.	Leslie Taylor		-pills	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F800 Notice of Privacy Practices 2013.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	HPV-gardasil.pdf	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F112 test HSV.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F040-S 11.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F040 DMPA 11.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F020S IUC 12.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F020 CIIC IUC 12.doc	Planned Parenthood Me	4/25/2014	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F017 017S Evra Instrc card.doc	Planned Parenthood Me	4/25/2014	

5. To refine the number of items displayed in the Inbox, use the **Practice**, **To** and **Type** filters located at the top of the Inbox.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.



6. Click a column name (**Type, To, From**, etc) to sort the line in ascending or descending order.
7. To navigate to other pages, select the page number from the drop-down list or click the **Previous** or **Next** links on the bottom right of the page.
8. Click an item in the list to open it.

## Replying to Messages

NextGen Patient Portal enables you to receive messages, such as appointment reminders from Planned Parenthood Mar Monte and to send back a response.

### To reply to a message:

1. Access your **Inbox**.
2. Select **Messages** from the Types list.

A list of messages display.

Practice: All		To: All		Type: All			
<input type="checkbox"/>	Type	To	From	Subject	Practice	Received	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: bleeding	Planned Parenthood Mar	12/23/2013	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F002-S.doc	Planned Parenthood Me	12/23/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: bleeding	Planned Parenthood Mar	12/23/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: bleeding	Planned Parenthood Mar	12/23/2013	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Mo	F002 Pill card.doc	Planned Parenthood Mar	12/23/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: test email	Planned Parenthood Me	12/20/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: test email	Planned Parenthood Me	12/20/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: test email	Planned Parenthood Me	12/20/2013	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F002 Pill card.doc	Planned Parenthood Me	12/18/2013	
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar M	F002-S.doc	Planned Parenthood Me	12/18/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: forgot to take pills	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: forgot to take pills	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	Messages	Leslie Taylor	Carol Dashiell	RE: forgot to take pills	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	<b>Delete</b>						

67 items Previous Page 4 of 4

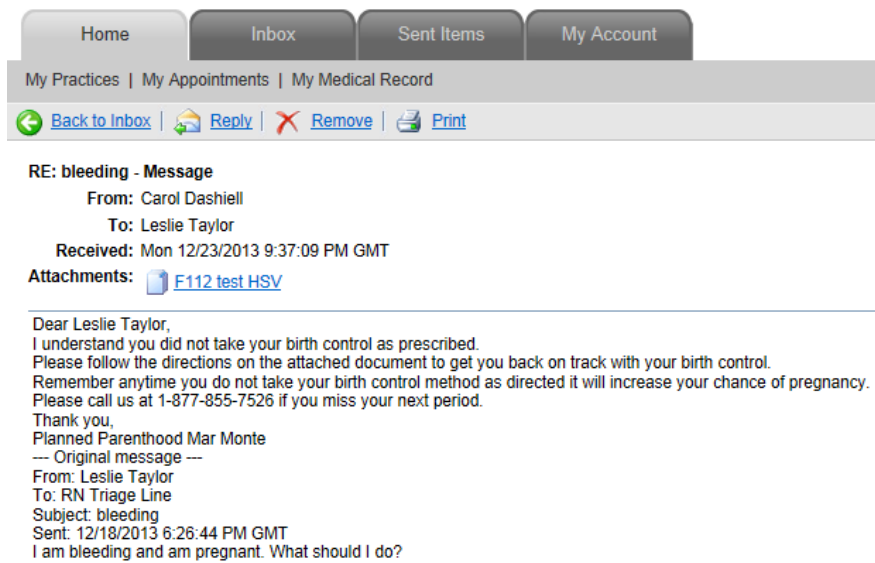
Icon Legend Collapse

- Unread message 
 - Read message 
 - Appointment response 
 - Medication response  
 - Document 
 - Template to be completed 
 - IMH form to be completed 
 - Statement to be paid 
 - Personal Health Record

Unread messages appear in bold type.

3. Click a message to open it.

The message opens in a new window.



Home | **Inbox** | Sent Items | My Account

My Practices | My Appointments | My Medical Record

[Back to Inbox](#) | [Reply](#) | [Remove](#) | [Print](#)

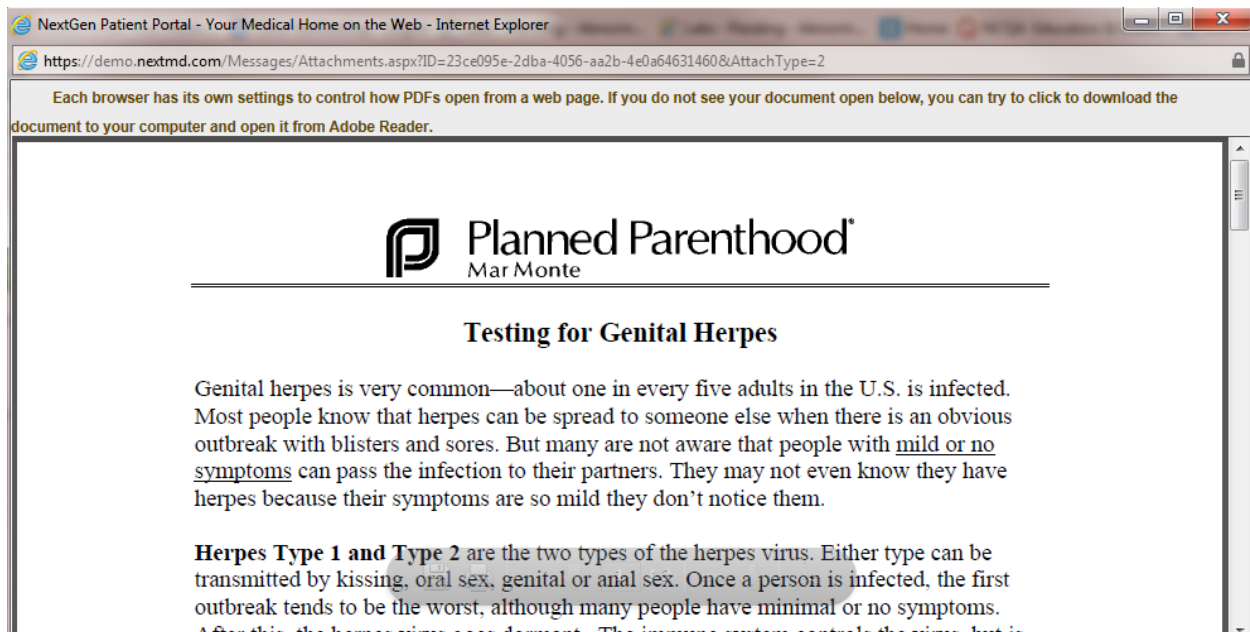
**RE: bleeding - Message**  
**From:** Carol Dashiell  
**To:** Leslie Taylor  
**Received:** Mon 12/23/2013 9:37:09 PM GMT  
**Attachments:** [F112 test HSV](#)

---

Dear Leslie Taylor,  
I understand you did not take your birth control as prescribed.  
Please follow the directions on the attached document to get you back on track with your birth control.  
Remember anytime you do not take your birth control method as directed it will increase your chance of pregnancy.  
Please call us at 1-877-855-7526 if you miss your next period.  
Thank you,  
Planned Parenthood Mar Monte  
--- Original message ---  
**From:** Leslie Taylor  
**To:** RN Triage Line  
**Subject:** bleeding  
**Sent:** 12/18/2013 6:26:44 PM GMT  
I am bleeding and am pregnant. What should I do?

4. To view any attachments (requires Adobe Acrobat Reader), click the appropriate link in the **Attachments** section.

The attachment opens in a new window.




NextGen Patient Portal - Your Medical Home on the Web - Internet Explorer

https://demo.nextmd.com/Messages/Attachments.aspx?ID=23ce095e-2dba-4056-aa2b-4e0a64631460&AttachType=2

Each browser has its own settings to control how PDFs open from a web page. If you do not see your document open below, you can try to click to download the document to your computer and open it from Adobe Reader.

---

 **Planned Parenthood**  
Mar Monte

---

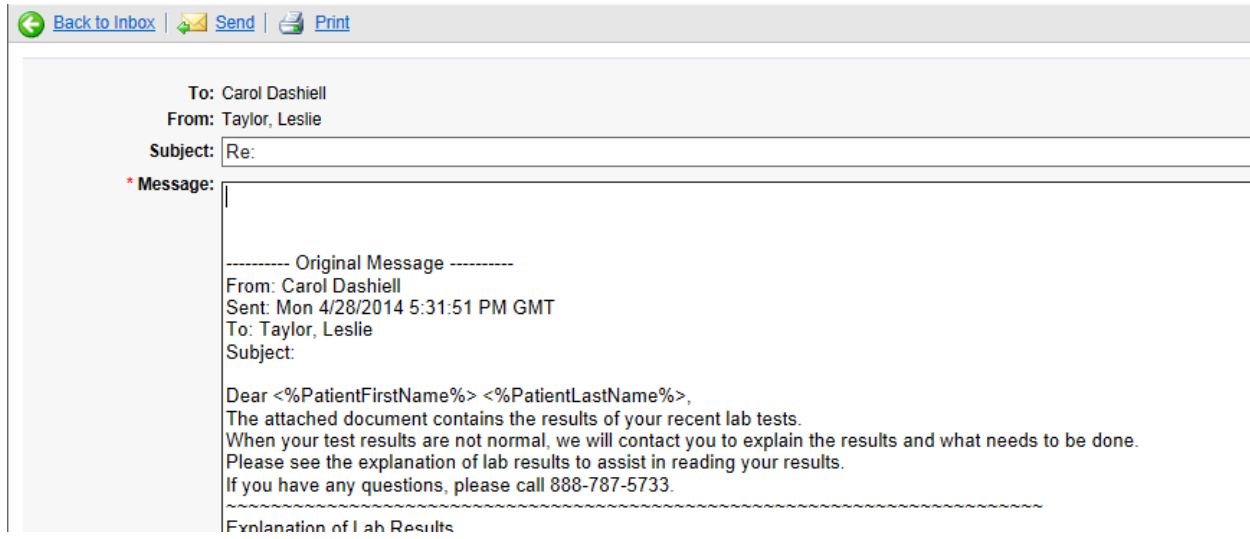
**Testing for Genital Herpes**

Genital herpes is very common—about one in every five adults in the U.S. is infected. Most people know that herpes can be spread to someone else when there is an obvious outbreak with blisters and sores. But many are not aware that people with mild or no symptoms can pass the infection to their partners. They may not even know they have herpes because their symptoms are so mild they don't notice them.

**Herpes Type 1 and Type 2** are the two types of the herpes virus. Either type can be transmitted by kissing, oral sex, genital or anal sex. Once a person is infected, the first outbreak tends to be the worst, although many people have minimal or no symptoms. After this, the herpes virus goes dormant. The immune system controls the time, but is

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 out the message, click the **Print** button.

7. Close the window and return to your account.

### Viewing Documents

In order to view documents sent from Planned Parenthood Mar Monte, you must use the Adobe® Acrobat™ Reader application. If you do not have it installed in your system, you can download it from the Adobe Web site (<http://get.adobe.com/reader/>).


#### To view a document:

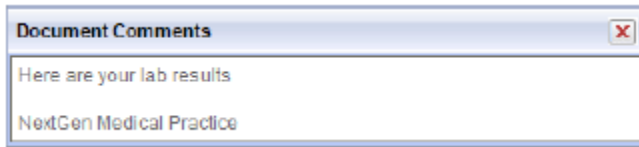
1. Access your **Inbox**.
2. Select **Documents** from the **Types** list.

A list of documents displays.

Practice: Planned Parenthood Mar Monte		To: All	Type: Documents			
<input type="checkbox"/>	Type	To	From	Subject	Practice	Received
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F002 Pill Card for Portal Patients.docx	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F800 Notice of Privacy Practices 2013.doc	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	HPV-gardasil.pdf	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F112 test HSV.doc	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F040-S 11.doc	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F040 DMPA 11.doc	Planned Parenthood Mar Monte	4/25/2014
<input type="checkbox"/>	Documents	Leslie Taylor	Planned Parenthood Mar Monte	F020S IUC 12.doc	Planned Parenthood Mar Monte	4/25/2014

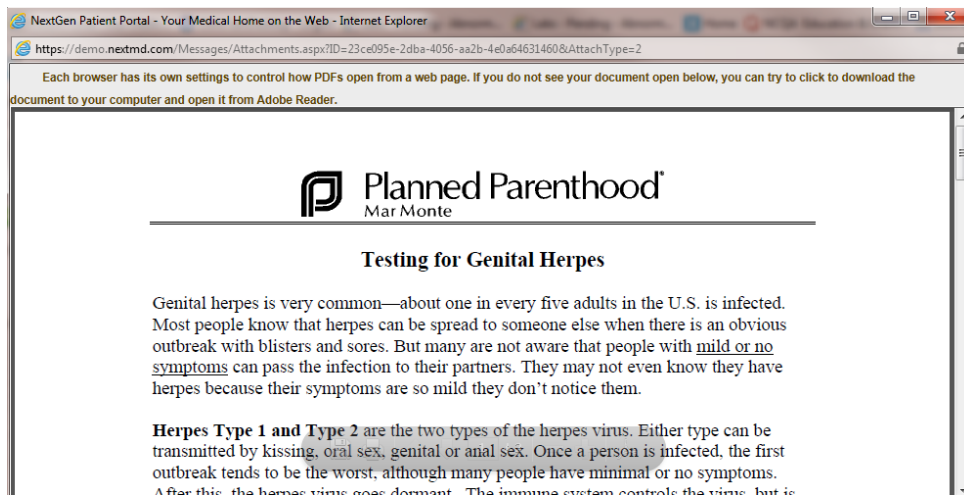
Unread documents appear in bold type.

3. To view comments sent from Planned Parenthood Mar Monte regarding the document click the **Balloon**  icon.



4. Click a document to view it.

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



## Viewing Personal Health Records

When you receive a personal health record in your Inbox, you can view it, print it, or save it.

### To view your personal health record:

1. Access your **Inbox**
2. Select **Personal Health Records** from the **Types** list.

A list of personal health records displays.

<input type="checkbox"/>	Type	To	From	Subject	Practice	Received
<input type="checkbox"/>	Personal Health Record	Leslie Taylor	Planned Parenthood Mar Monte	Personal Health Record 04/16/2014	Planned Parenthood Mar Monte	4/16/2014

1 items Page 1 of 1

Icon Legend Collapse

- Unread message - Read message - Appointment response - Medication response  
- Document - Template to be completed - IMH form to be completed - Statement to be paid - Personal Health Record

Unread records appear in bold type.

3. Click a record to view it.

View Personal Health Record

Select Patient: Leslie Taylor-Planned Parenthood Mar Monte View Audit History

Clinical History As Of Wed 4/16/2014 7:02:53 PM GMT - Leslie Taylor-Planned Parenthood Mar Monte

Demographic Info	Medication	Instructions	Dosage	Effective Dates (start - stop)	Status
<a href="#">Medications</a> <a href="#">Allergies</a> <a href="#">Immunizations</a> <a href="#">Problems</a> <a href="#">Procedures</a> <a href="#">Results</a> <a href="#">Payer</a> <a href="#">Family History</a> <a href="#">Social History</a> <a href="#">Vital Signs</a> <a href="#">Advanced Directives</a>	Unknown				

Do you want to open or save PersonalHealthRecord\_5597b36d-d862-45d2-8808-e48d23cb30bf.pdf (102 KB) from demo.nextmd.com?

Open Save Cancel

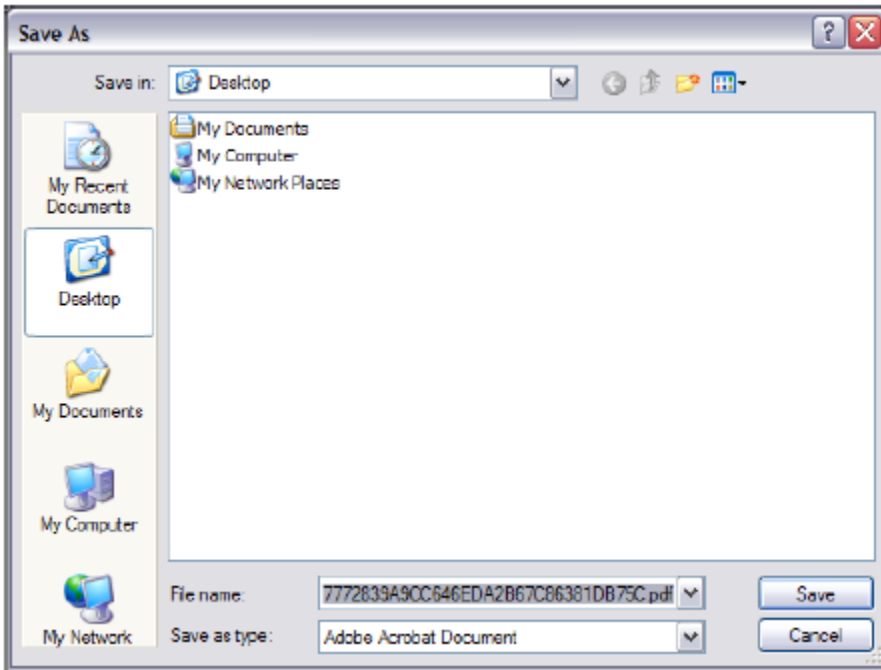
4. Select a category (such as problems or procedures) on the left to view additional information.
5. To save the record as a PDF file (requires Adobe Acrobat Reader to view):
  - ❖ Click **Save**.

The File Download dialog box displays.

- ❖ Click **Save**.

**Note:** you can also click **Open** to view the record and then print it.

The Save As dialog box displays.

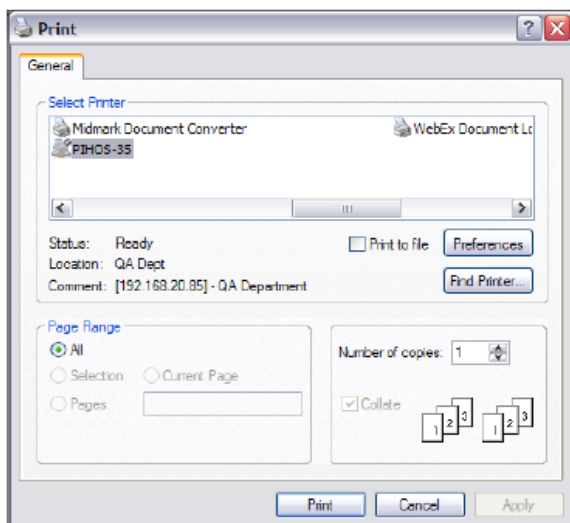


If needed, select a location, enter a file name and click **Save**.

- To print the record:
  - ❖ Click **Print**.

Select a printer.

The **Print dialog** box displays.



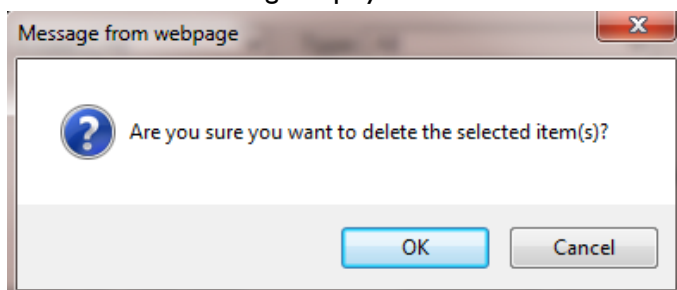
- ❖ Click **Print**.

## Deleting Inbox Items

To delete one or more items from the Inbox:

1. Access your **Inbox**.
2. To refine the number of items displayed, use the **Practice**, **To**, and **Type** filters located at the top of the Inbox.  
You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.
3. Click a column name (**Type**, **To**, **From**, etc.) to sort the list in ascending or descending order.
4. To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
5. Either select the check box next to each item you want to remove or select the check box next to the **Delete** button to remove all items.
6. Click **Delete**

A confirmation message displays.



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

## Sent Items

The Sent Items page displays all messages and items you have sent. From the Sent Items page, you can also click links at the top of the page to:

- ❖ Compose messages
- ❖ Generate Personal Health Records
- ❖ Request appointments
- ❖ Research health topics

## Accessing Sent Items

To access sent items:

1. Either select the **Sent Items** tab or click the **Sent Items** link on the navigation pane.

Practice: All		From: All		Type: All			
<input type="checkbox"/>	Type	To	From	Subject	Practice	Sent	
<input type="checkbox"/>	Appointments		Leslie Taylor	depo	Planned Parenthood Mar	4/28/2014	
<input type="checkbox"/>	Messages	CFU RNs	Leslie Taylor	I do not understand my lab results	Planned Parenthood Mar	4/28/2014	
<input type="checkbox"/>	Messages	RN Triage Line	Leslie Taylor	bleeding	Planned Parenthood Mar	4/25/2014	
<input type="checkbox"/>	Messages	CFU RNs	Leslie Taylor	lab results	Planned Parenthood Mar	4/21/2014	
<input type="checkbox"/>	Personal Health	Planned Parenthood Mar Mo	Leslie Taylor	Personal Health Record 04/16/2014	Planned Parenthood Mar	4/16/2014	
<input type="checkbox"/>	Messages	RN Triage Line	Leslie Taylor	test email	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	Messages	RN Triage Line	Leslie Taylor	bleeding	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	Messages	RN Triage Line	Leslie Taylor	forgot to take pills	Planned Parenthood Mar	12/18/2013	
<input type="checkbox"/>	<b>Delete</b>						

8 items Page 1 of 1

[Icon Legend](#) [Collapse](#)

- To refine the number of sent items displayed, use the **Practice**, **To**, and **Type** filters located above the list of sent items.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

- Click a column name (**Type**, **To**, **From**, etc.) to sort the list in ascending or descending order.
- To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
- Click an item in the list to open it.

## Deleting Sent Items

### To delete one or more sent items:

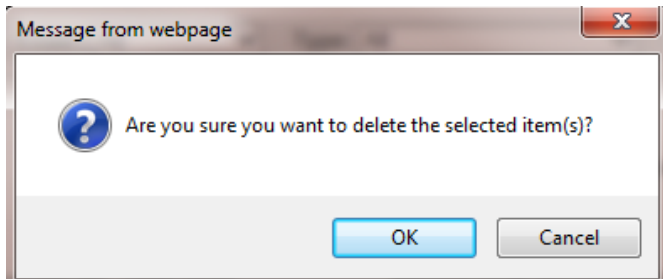
- Select the **Sent Items** tab or click the **Sent Items** link on the navigation pane.
- To refine the number of items displayed, use the **Practice**, **To**, and **Type** filters located above the list of sent items.

You can also click a type (messages, documents, etc.) from the navigation pane to display just those items.

- Click a column name (**Type**, **To**, **From**, etc.) to sort the list in ascending or descending order.
- To navigate to other pages, select the page number from the list or click the **Previous** or **Next** links on the bottom right of the page.
- Either select the check box next to each item you want to remove or select the check box next to the **Delete** button to remove all items.
- Click **Delete**.



A confirmation message displays.



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

# Chapter 6

## Tasks

This chapter explains how to compose messages, request health records, request appointments and use the research center.

### Composing Messages

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

#### To compose a message:

1. From the **Inbox** tab, **Sent Items** tab or the navigation pane, click the **Compose Message** link.

The *Compose Message* form displays.

#### Compose Message

---

##### 1) Select Practice and Patient

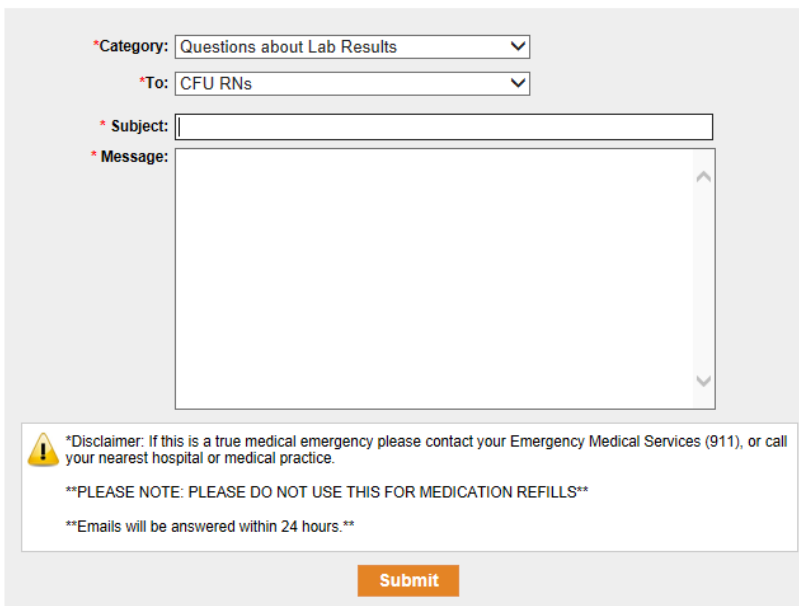


\*Practice:

2. Scroll to the **Select Practice and Patient** section and complete as follows:

##### 2) Select Message Category and Recipient

Please select the appropriate message category and recipient from the drop down lists below. Asterisk (\*) denotes required field.




\*Category:

\*To:

\* Subject:

\* Message:

 \*Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice.

\*\*PLEASE NOTE: PLEASE DO NOT USE THIS FOR MEDICATION REFILLS\*\*

\*\*Emails will be answered within 24 hours.\*\*

- ❖ Select the type of message you are sending from the **Category** list.
- ❖ Select the recipient of the message from the **To** list.
- ❖ Type the **Subject** of the message in the corresponding field.
- ❖ Type your **Message** in the corresponding field.

3. Click **Submit**.

A message indicating that your message has been successfully sent displays.

## Requesting Personal Health Records

The following procedure describes how to request a Personal Health Record (PHR) from Planned Parenthood Mar Monte. 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 personal health record:

1. From the **Inbox** tab, **Sent Items** tab or the navigation pane, click the **Personal Health Record** link.


The *Request Personal Health Record* form displays.

#### Request Personal Health Record

##### 1) Select Practice and Patient

*Please select the medical practice and the person on which behalf the request will be sent to the practice.*

\*Practice:  ▼

 Health information that will be available on the portal: list of diagnoses, test results, medication list, medication allergy list, and instructions given at each visit.

If you want an electronic copy of your health information that is not routinely available to you on the portal, you will need to complete an Authorization form and present it to your health center.

2. 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.

3. Click on the record to view it or go to your **Home** page and select the **My Medical Record** link.

The active medications are displayed on the top part of the page and they are listed in the reverse chronological order (with the most recent items at the top).

# Appointments

## Starting an Appointment Request

Use the following procedure to begin an appointment request. After completing this section you can submit the request and wait for a response. A red asterisk next to a field name indicates a required entry.

### To start an appointment request:

1. From either the **Inbox** tab, **Sent Items** tab or the navigation pane, click the Request Appointment link.

The *Appointment Request form* displays.

Appointment Request

---

1. ENTER REQUEST      2. SELECT APPOINTMENT      3. VIEW DETAILS

---

1) Select Your Medical Practice

Please select the medical practice for that appointment.

\*Practice:

---

2) Select Provider and Location

Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (\*) denotes required field.

\*Select provider/group:

\*Select category:

\*Select location:  [Address](#)

Please bring your photo ID and insurance card to your appointment. Thank you, Planned Parenthood Mar Monte.

- ❖ Select the **provider** or **group** who you want to see for your appointment.
- ❖ Select the **category** or **type** of appointment you want to schedule, such as Pregnancy Test.
- ❖ Select the health center **location** where you want to schedule the appointment.

The hours of operations display when you select a location.

## 2 ) Select Provider and Location

Please select your provider, the appropriate appointment category and desired location from the drop down lists below. Asterisk (\*) denotes required field.

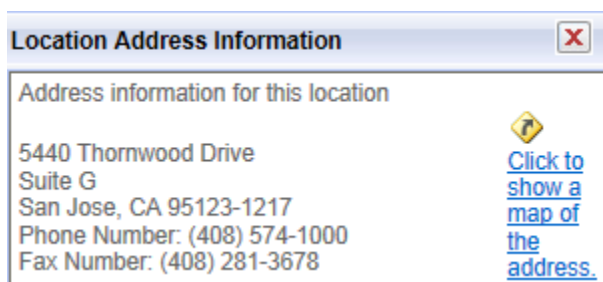
\*Select provider/group: Clinician

\*Select category: Depo Injection

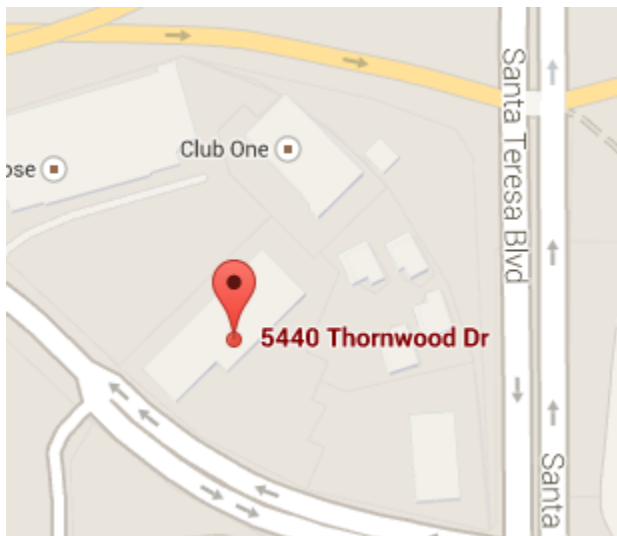
\*Select location: Blossom Hill [Address](#)

Hours of operation: Mon: 8:30 AM - 6:30 PM  
Tue: 8:30 AM - 6:30 PM  
Wed: 8:30 AM - 6:30 PM  
Thu: 8:30 AM - 5:00 PM  
Fri: 8:30 AM - 5:00 PM

- ❖ To view the address information for the selected location, click the **Address** link.



- ❖ If needed, click the **Map** icon to view the address information for a selected location in a new window.



3. **Submit** the request and wait for a response from Planned Parenthood Mar Monte.

## Submitting an Appointment Request

Submitting an appointment request does not guarantee an actual appointment at Planned Parenthood Mar Monte. It must be confirmed by Planned Parenthood Mar Monte before it is considered a booked appointment. Allow at least 24 hours to receive a response.

### To submit an appointment request:

1. Complete Sections 1 and 2 of the Appointment Request form.
2. Scroll to the **3) Submit Request** section.

#### 3 ) Submit Request

Please fill in all required fields and click the Submit button to submit your request.


\*Reason for appointment:

\*Priority:

\*Make appointment for:

\*Preferred date/time:  to   
 Mon  Tue  Wed  Thu  Fri

Alternate date/time:  to   
 Mon  Tue  Wed  Thu  Fri

 \*Disclaimer: If this is a true medical emergency please contact your Emergency Medical Services (911), or call your nearest hospital or medical practice. Email and appointment request will be answered within 24 hours.

3. Enter or select the following information:
  - ❖ **Reason for appointment:** Enter the reason for the appointment
  - ❖ **Priority:** Choose a level of urgency (Low, Normal, or High).
  - ❖ **Make appointment for:** Choose the time frame for your appointment, such as next week or next month.
  - ❖ **Preferred date/time:** Choose a time within the hours of operation (displayed beneath the location) then check a corresponding box for the day when you would like to schedule the appointment.
  - ❖ **Alternate date/time:** If available, choose an alternate day and time when you would like to schedule the appointment if the preferred time is not available and then check a corresponding 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.

5. When Planned Parenthood Mar Monte responds to your request, we send an email notifying you to log on to your account to review the appointment request response.
6. Open the request response to see if the appointment was booked or is pending.
7. If the suggested time is not suitable, you need to either cancel the appointment or reschedule the appointment and then create a new request.

### Responding to an Appointment Request

When you receive a pending appointment from Planned Parenthood Mar Monte, it means that further action is required on your part to complete the request.

#### To respond to a pending appointment request:

1. From the **Inbox** tab, open a pending appointment.

The *Appointment Request form* displays.



This appointment request is awaiting your response

Click [here](#) to view your appointment.

**Date practice responded:** Mon 5/5/2014 11:55:38 PM GMT  
**Proposed appointment date:** Your selected appointment date/time is not available. Please contact your practice.  
**Proposed provider:** Clinician  
**Proposed location:** Blossom Hill  
5440 Thornwood Drive  
Suite G  
San Jose, CA 951231217  
(408) 574-1000

**Message from practice:**

Dear Leslie Taylor,  
Thank you for contacting Planned Parenthood Mar Monte.  
Unfortunately, we are unable to schedule your appointment online as we do need more information.  
Please call us at 1-877-855-7526 so we can better assist you in scheduling an appointment.  
Thank you,  
Planned Parenthood Mar Monte

**Original Appointment Request**

**Patient Name:** Leslie Taylor  
**Date sent to practice:** Mon 5/5/2014 11:32:54 PM GMT  
**Requested provider:** No response  
**Requested category:** Depo Injection  
**Requested location:** Blossom Hill  
**Appointment priority:** Normal  
**1st preferred:** Mon, Tue, Wed, Thu or Fri from 8:30 AM to 6:30 PM  
**2nd preferred:**  
**Reason for appointment:**  
depo

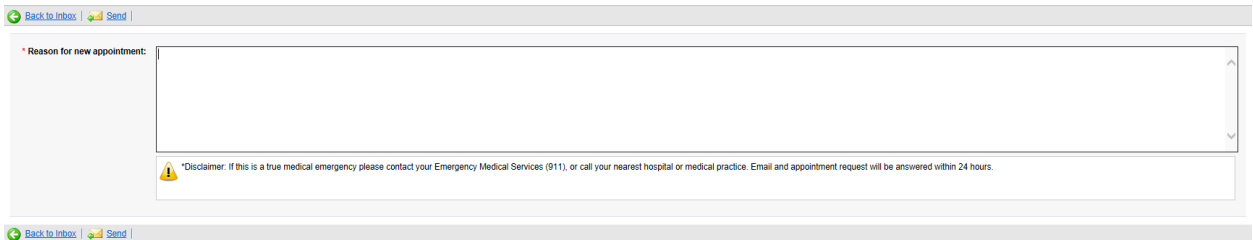


2. To accept the appointment:
  - ❖ Click **Accept**.

A message that your appointment response has been successfully submitted displays.

3. To request a new appointment:
  - ❖ Click **Reply**

The *Request New Appointment* form displays:

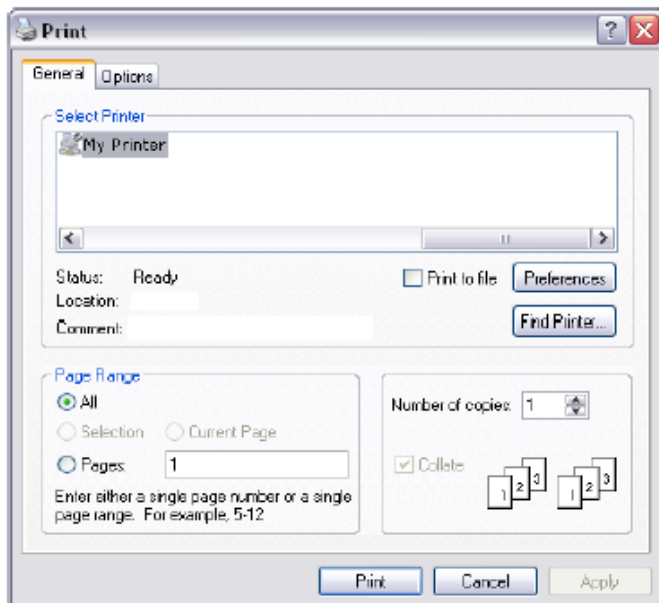


- ❖ Enter the reason for the new appointment and click **Send**.

A message that your appointment response has been successfully submitted displays.

- ❖ Click the **Request Appointment** link to submit a new request.
4. To print out the appointment:
    - ❖ Click **Print**.

A new window containing your request details opens followed by the *Print* dialog box.



- ❖ If needed, select a printer and click **Print**.



5. To exit the *Appointment Response* form, click the **Back to Inbox** button.

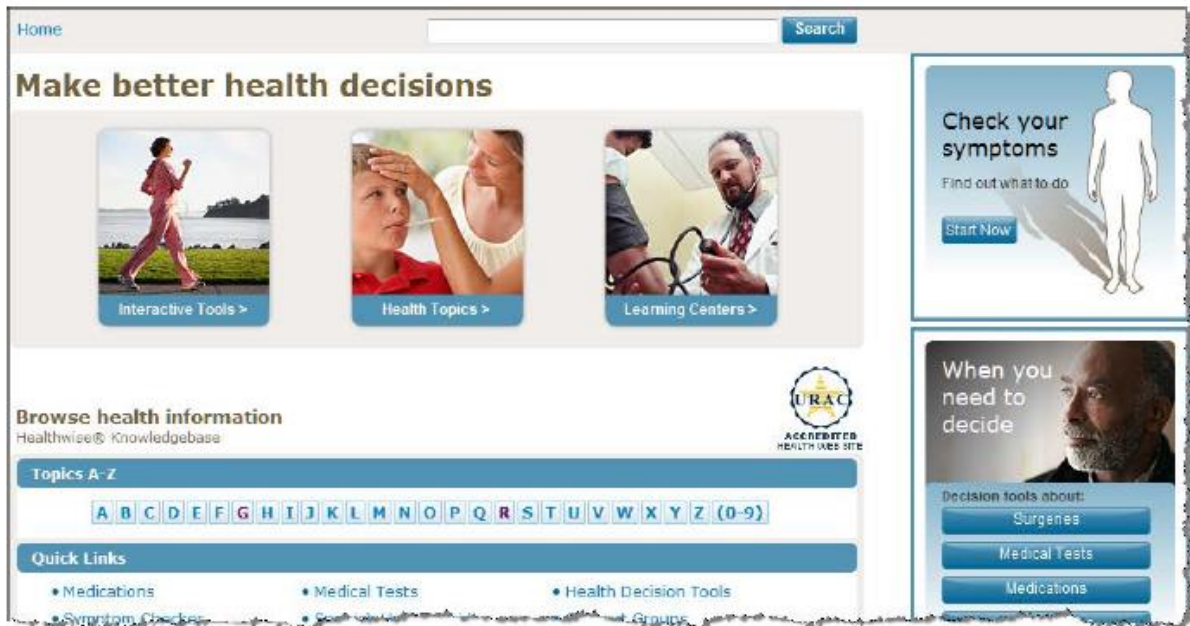
## Research Center

Use the Research Center link to view the Healthwise® Health Information Knowledgebase, an online health encyclopedia.

### To access the Healthwise Knowledgebase:

1. From the navigation pane or the upper right of any tabbed page (Home, Inbox, etc.) click the **Research Center** link:

The *Healthwise Knowledgebase Home* page displays.

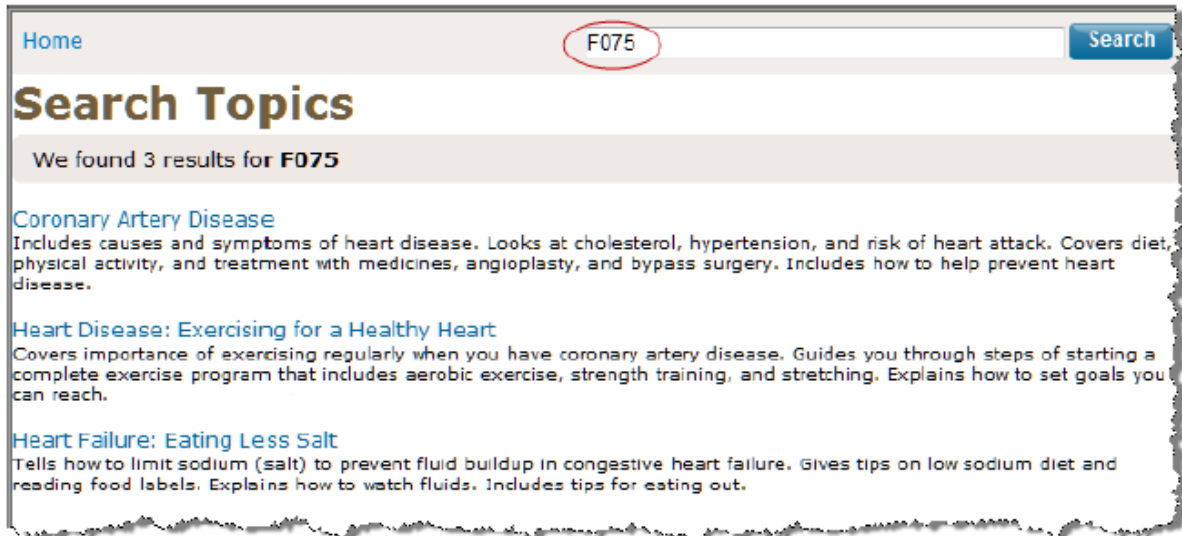


2. From this page you can:

- ❖ **Perform a Search:** The search function enables you to research health topics. If you receive 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.



In the case of F075 to address “A Health Heart: After Your Visit, “ the Knowledgebase addresses what Heart Disease is, how to treat it, lifestyle changes to improve the condition, classes of medicines to be taken, procedures that can be performed, etc.

- ❖ **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 Planned Parenthood Mar Monte for better health decisions.
- ❖ **Access Learning Centers:** Use this feature to learn about medical conditions, how the body works, and other health-related topics.
- ❖ **Check Your Symptoms:** This interactive tool enables you to pick an area of the body, select your symptoms, and view related topic.
- ❖ **Access Decision Tools:** Decision Points are designed to guide you through key health decisions (such as surgeries, medical test, medicines, and health issues), combining medical information with your person 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.
- ❖ **Use Quick Links:** The Quick Links option provides short cuts to information on medication, medical tests, health decision tools, and the symptom checker and support groups. It also provides a link to a Spanish Health Guide.

Information from this Web site 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 URAC accredited health web site 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 7

## My Account

This chapter provides instructions on how to update information in your NextGen Patient Portal account.

### Account Settings

This section describes how to use the functions that appear under My Account 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 when required.

#### To change your user name:

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

The *Account Settings* page displays.

Account Settings   My Information   Manage User Grants   Manage Practices   Statement Notifications	
<b>Account Settings</b>	
<b>User Name</b>	<a href="#">Edit</a>
Your User Name	leslietaylor680
<b>Password</b>	<a href="#">Edit</a>
Your Password	*****
<b>Security Question</b>	<a href="#">Edit</a>
To identify you as the account owner	Who is your favorite singer?
<b>Forgot Password Question</b>	<a href="#">Edit</a>
To request a password reset	favorite singer
<b>Un-enroll from Patient Portal</b>	<a href="#">Edit</a>
Delete your Patient Portal account	

2. In the User Name section, click the **Edit** link.

The User Name section expands.

User Name [Hide](#)

---

Your User Name leslietaylor680

*User name must be between 6-20 characters and is case sensitive.*

\* New user name:

\* Retype user name:

---

For security reasons, please provide your current password to confirm your identity.

\* Current password:

**Submit**

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 6 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 used to log on the NextGen Patient Portal Web site that was provided while you registered in NextGen Patient Portal when required.

#### To change your password:

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

The *Account Settings* page displays.

Account Settings | My Information | Manage User Grants | Manage Practices | Statement Notifications

---

**Account Settings**

---

<b>User Name</b>	<a href="#">Edit</a>
Your User Name	leslietaylor680
<b>Password</b>	<a href="#">Edit</a>
Your Password	*****
<b>Security Question</b>	<a href="#">Edit</a>
To identify you as the account owner	Who is your favorite singer?
<b>Forgot Password Question</b>	<a href="#">Edit</a>
To request a password reset	favorite singer
<b>Un-enroll from Patient Portal</b>	<a href="#">Edit</a>
Delete your Patient Portal account	

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

<b>Password</b>	<a href="#">Hide</a>
Your Password	*****

*Password must be between 6-20 characters which can be a combination of letters, numbers and special characters and is case sensitive.*

\* New password:

\* Retype password:

---

For security reasons, please provide your current password to confirm your identity.

\* Current password:

**Submit**

3. Enter your **new password** and then retype it in the fields provided.  
All fields are required. Passwords are case sensitive, must be between 6 and 20 characters and contain at least one number.

As you type your password, a password strength indicator displays. Use mixed-case alphabets, numbers and punctuation characters to increase the password strength.

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

A message that your password has been updated displays.

The next time you log in to the NextGen Patient Portal, use your new password.

## Changing Your Security Question

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

### To change your security question:

1. From either the **My Account** tab or the navigation pane, click the **Account Settings** link. The *Account Settings* page displays.

Account Settings | My Information | Manage User Grants | Manage Practices | Statement Notifications

---

**Account Settings**

<u>User Name</u>	<a href="#">Edit</a>
Your User Name	leslietaylor680
<u>Password</u>	<a href="#">Edit</a>
Your Password	*****
<u>Security Question</u>	<a href="#">Edit</a>
To identify you as the account owner	Who is your favorite singer?
<u>Forgot Password Question</u>	<a href="#">Edit</a>
To request a password reset	favorite singer
<u>Un-enroll from Patient Portal</u>	<a href="#">Edit</a>
Delete your Patient Portal account	

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

Security Question [Hide](#)

To identify you as the account owner      Who is your favorite singer?

**Current question:** Who is your favorite singer?

\* **New question:**

\* **New answer:**

\* **Retype answer:**

For security reasons, please provide your current password to confirm your identity.

\* **Current password:**

**Submit**

3. Select a **new question** from the list.

4. Enter and confirm your **new answer** in the fields provide.

**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 the NextGen Patient Portal when required.

#### To change your forgotten password question:

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

The *Account Settings* page displays.

Account Settings | My Information | Manage User Grants | Manage Practices | Statement Notifications

---

#### Account Settings

---

<b>User Name</b>	<a href="#">Edit</a>
Your User Name	leslietaylor680
<b>Password</b>	<a href="#">Edit</a>
Your Password	*****
<b>Security Question</b>	<a href="#">Edit</a>
To identify you as the account owner	Who is your favorite singer?
<b>Forgot Password Question</b>	<a href="#">Edit</a>
To request a password reset	favorite singer
<b>Un-enroll from Patient Portal</b>	<a href="#">Edit</a>
Delete your Patient Portal account	

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



The Forgot Password section expands and displays your current question.

[Forgot Password Question](#) [Hide](#)

To request a password reset favorite singer

**Current Question:** favorite singer

\* **New question:**

\* **Retype question:**

\* **New answer:**

\* **Retype answer:**

---

For security reasons, please provide your current password to confirm your identity.

\* **Current password:**

[Submit](#)

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 when required.

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

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

The *Account Settings* page displays.

Account Settings | [My Information](#) | [Manage User Grants](#) | [Manage Practices](#) | [Statement Notifications](#)

---

**Account Settings**

---

<b>User Name</b>	<a href="#">Edit</a>
Your User Name	leslietaylor680
<b>Password</b>	<a href="#">Edit</a>
Your Password	*****
<b>Security Question</b>	<a href="#">Edit</a>
To identify you as the account owner	Who is your favorite singer?
<b>Forgot Password Question</b>	<a href="#">Edit</a>
To request a password reset	favorite singer
<b>Un-enroll from Patient Portal</b>	<a href="#">Edit</a>
Delete your Patient Portal account	

2. In the **Un-enroll from NextGen Patient Portal** section, click the **Expand** link.

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

Un-enroll from Patient Portal [Hide](#)

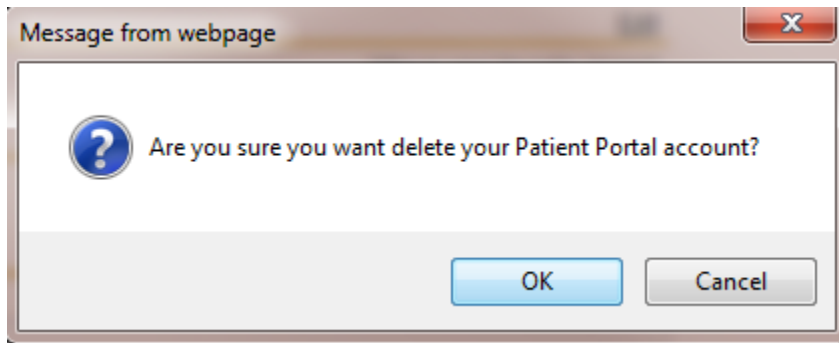
---

Delete your Patient Portal account

Reason: **Un-enroll**

3. Select the **Reason** you are un-enrolling from the corresponding list.
4. Click **Un-enroll**.

A confirmation message displays.



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

## My Information

You can update your name, address, email and phone number at any time. However, updates to your personal contact information are not sent electronically. You must contact Planned Parenthood Mar Monte by changing it at a health center.

### 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 Web site only. The changes are NOT SENT to Planned Parenthood Mar Monte.

#### To update your name and date of birth:

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

Information about your account displays.

### My Information



The information on this screen is used by the portal only. The changes are not sent to the practice.

Leslie Taylor 06/27/1993

[Edit](#)

Mailing Addresses

[Add](#)

125 Main Dr. , Lodi CA 95240

[Edit](#)

E-mail Address

[Add](#)

leslietaylor680@yahoo.com

[Edit](#)

Phone


[Add](#)


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

Your name and date of birth fields display.

Leslie Taylor 06/27/1993

[Hide](#)

First name:	<input type="text" value="Leslie"/>
Middle name/initial:	<input type="text"/>
Last name:	<input type="text" value="Taylor"/>
Date of birth:	<input type="text" value="6/27/1993"/> 
<a href="#">Update</a>	

3. Make the 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 Web site only. The changes ARE NOT sent to Planned Parenthood Mar Monte.


## To manage your mailing addresses:

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

Information about your account displays.

**My Information**

---

 The information on this screen is used by the portal only. The changes are not sent to the practice.

---

Leslie Taylor 06/27/1993 [Edit](#)

---

Mailing Addresses [Add](#)

125 Main Dr. , Lodi CA 95240 [Edit](#)

---

E-mail Address [Add](#)

leslietaylor680@yahoo.com [Edit](#)

---

Phone [Add](#)

2. Scroll down to the **Addresses** section.
3. To add a new address:
  - ❖ Click the **Add** link.

A blank address form displays.

Mailing Addresses [Add](#)

\* Address 1:

Address 2:

\*City:

\*State:

\*Zip Code:  -

\*Type:

[Add](#)

---

125 Main Dr. , Lodi CA 95240 [Edit](#)

- ❖ 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.

Mailing Addresses [Add](#)

---

125 Main Dr. , Lodi CA 95240 [Hide](#)

\* Address 1:

Address 2:

\*City:

\*State:  ▼

\*Zip Code:  -

\*Type:  ▼

- ❖ 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.

Are you sure to delete selected  
address(es)?

- ❖ Click **OK**

A message that your address had been deleted displays.

## Managing Your E-mail Addresses

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

**Note:** The information listed here is used by the NextGen Patient Portal Web site only. The changes ARE NOT sent to Planned Parenthood Mar Monte.


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

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

The information about your account displays.

**My Information**

---

 The information on this screen is used by the portal only. The changes are not sent to the practice.

---

Leslie Taylor 06/27/1993 [Edit](#)

---

Mailing Addresses [Add](#)

125 Main Dr. , Lodi CA 95240 [Edit](#)

---

E-mail Address [Add](#)

leslietaylor680@yahoo.com [Edit](#)

---

Phone [Add](#)

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.

E-mail Address [Add](#)

---

\*E-mail Address

Format:

Receive notifications at this e-mail address

---

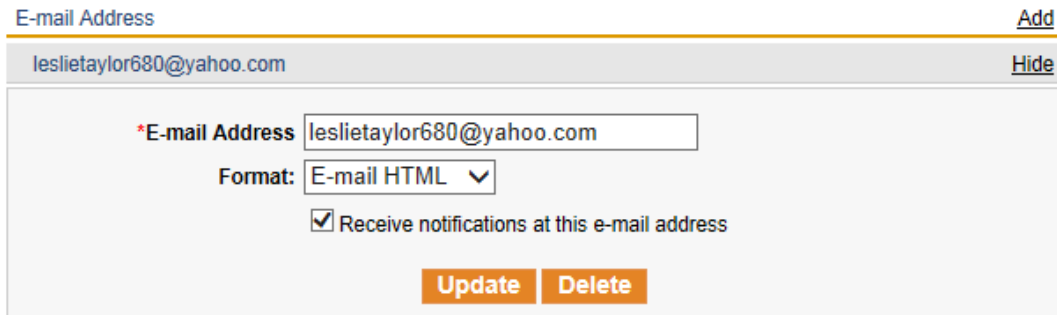
leslietaylor680@yahoo.com [Edit](#)

- ❖ Enter the new **E-mail address** in the field provided.

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

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

Information about the selected e-mail displays.

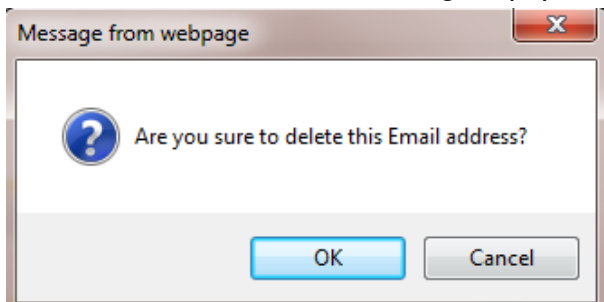


- ❖ Make your changes as needed (field names with red asterisks are required).
- ❖ Click **Update**

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

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

- ❖ Click **Delete**. A confirmation message displays.



- ❖ Click **OK**.

## Managing Your Phone Numbers

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

**Note:** The information listed here is used by the NextGen Patient Portal Web site only. The changes ARE NOT sent to Planned Parenthood Mar Monte.

### To manage your phone numbers:

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

Information about your account displays.

The screenshot shows the 'My Information' page with a warning icon and text: 'The information on this screen is used by the portal only. The changes are not sent to the practice.' Below this, there are sections for 'Leslie Taylor 06/27/1993' with an 'Edit' link, 'Mailing Addresses' with an 'Add' link, and a row for '125 Main Dr. , Lodi CA 95240' with an 'Edit' link. There is also an 'E-mail Address' section with 'leslietaylor680@yahoo.com' and an 'Edit' link, and a 'Phone' section with an 'Add' link.

2. Scroll to the **Phone** section.
3. To add another phone number:
  - ❖ Click the **Add** link.

A blank phone number form displays.

The screenshot shows a blank phone number form with the following fields: '\*Phone Number' (with a red asterisk and a placeholder '( ) - -'), 'Extension:', and 'Type:' (with a dropdown menu showing 'Home'). There is an 'Add' button at the bottom right.

- ❖ 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.

Phone	<a href="#">Add</a>
(408) 214-3651	<a href="#">Hide</a>
<p>*Phone Number: <input type="text" value="(408) 214-3651"/></p> <p>Extension: <input type="text"/></p> <p>Type: <input type="text" value="Alternative"/></p> <p><input type="button" value="Update"/> <input type="button" value="Delete"/></p>	

- ❖ Make your changes as needed (field names with red asterisks are required).
- ❖ Click Update.

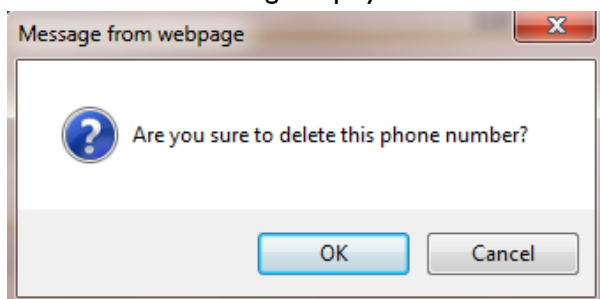
A message that your phone number has been updated displays.

5. To delete a phone number:
  - ❖ Click the **Edit** link next to the phone number you want to change.

The information about the selected phone displays.

- ❖ Click **Delete**

A confirmation message displays.



A message that your phone number has been deleted displays.