NextGen PxP Portal Enrollments Overview

Application Version 6.2021.1 or higher

Environment

Instructions The following options are available for inviting patients to NextGen PxP Portal:

- Auto Invites
- · Manual invites

Auto Invites

Auto invites should only be turned on after go-live.

Invitations will be triggered if a patient has a chart added, a change occurs to one of the below required demographic fields, there is a new encounter, or a new appointment is added.

Required demographic fields:

- First name
- Last name
- DOB (date of birth)
- Birth sex
- Zip code
- Email address

Note: These fields (in addition to cell phone, if available) will be sent to the patient portal each time an invite is re-sent or a demographic field changes until the patient activates their portal account (up to 4 times in 30 days).

Best Practices

- 1. The above required fields should be confirmed each time upon opening a patient's chart.
- The Auto Invite Schedule in the PxP Portal Integration Tool (PPIT) should be configured to only send auto invites during your normal hours of operation.

For more information on enabling auto invites in NextGen PxP Portal, review this article.

Manual Invites

Manual invites can be used to send portal invitations to patients on demand.

The following fields in Patient Demographics must be completed to manually send a portal invitation:

- 1. First name
- 2. Last name
- 3. DOB (date of birth)
- 4. Birth sex
- 5. Zip code 6. Email address

Note: These fields (in addition to cell phone, if available) will be sent to the Patient portal each time an invite is re-sent or demographic field changes until the patient activates their portal account (up to 4 times in 30 days).

How to send a manual "on-demand" portal invite

Option 1: Log in to NextGen Enterprise PM or EHR and search for the patient. Right click on the patient, select Patient Portal, and click Enroll Now

🔈 Patient Lookup								×		
Search Criteria Last First / Preferred Test	Middle	Previous Last	City	Address Line 1 Zip N	Mother's Mai	den Name	2	2		
Social Security Birth Date Sex Image: Phone Search By Image: Med Rec Nbr Policy Nbr Image: Phone Nbr ··· //// /// /										
View By External System External ID										
All Patients										
Birth Date 6 L4DSSN										
Matabias Decente										
			1	1		1	1			
Name	Patient Portal	Preferred N	Maiden Name	Address	Sex	Birth Dt	SS Nbr	^		
Test, 09	N			Street Melrose, NY 1212	Male	05/05/1978				
🚞 Test, 1	N	w		Bh Schenectady, NY 123	Male	04/04/1960				
🚞 Test, 1	N OF	Open Chart		Bh Schenectady, NY 123	Female	04/04/1945				
Test, 1	N Ch			Bggvd3eff Schenectady,	Female	04/04/1990				
🚞 Test, 1	N			Bh Schenectady, NY 123	Female	04/04/1960				
🚞 Test, 1	N EII	Eligibility Verification		Bh Schenectady, NY 123	Female	04/04/1990				
🚞 Test, 109745	N Est	timate Patient Co	ost	Qweqwe New York, NY	Male	09/28/1987				
🚞 Test, 118147	N Ne	w Referral		lu Schenectady, NY 123	Male	10/10/1980				
Test, 118253	N	ferral History		Asasass Schenectady, N	Male	10/10/1980		×		
< .							2	*		
	VIE	ew History								
	Ne	New Authorization		Records Found: 100						
	Au	thorization Histo	ory							
Clear Find -	Pa	tient Portal	•	Enroll Now	New	Open	Close			
				Send Message						

Option 2: Log in to NextGen Enterprise PM or EHR, search for the patient, and open the patient's chart. In the patient's banner, click the Patient Portal icon and select Enroll Now

PM Banner:

	🔀 Patient Chart - Test, 09							
	🖻 🛅 09 Test (M) DOB: 05/05/1978 (44 years) Person Number: 1675 Medical Record Number: 1158 Other ID Number:							
	Contact : (111) 111-1111 (C)	Default Guarantor : 09 Test						
	Contact Preference :	Patient Status :						
		Patient Portal : 💵 Enroll Now						
	Alerts							
	Patient Information		<u>F</u> inancial					
	EHR Banner:							
	09 Test (M) DOB: 05/05/1978 (44 years) Weight: Unknown Alerts	Allergies 0 Problems ? Diagnoses	6 Medications 2 Appointments 0 Lab Results					
	Address: Street Parent/Guardian:	PHARMACY CODE 1 ID: PCP:	Population Health Sync					
	Melrose, NY 12121 Pref. Language:	Pharm: Referring:						
	Contact: (111) 111-1111 (C) Patient Portal:	Now Rendering: JA D	ental DDS, Francis					
	💌 🌈 🗐 🧭 🌌 PHI Log Chm Scheduling Hez Link 🍨 Sticky Note	Referring Provider HIPAA Advance Directive	/es 🔶 Screening Summary					
	Order Search Q Favorites Immuniza	tions 🤚						
Attachmont								
Attachment 1								
Attachment 2								
Attachment								
Attachment								
4								
Attachment								
5								
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Title	NextGen PxP Portal Enrollments Overview							
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