

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.
2. 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.

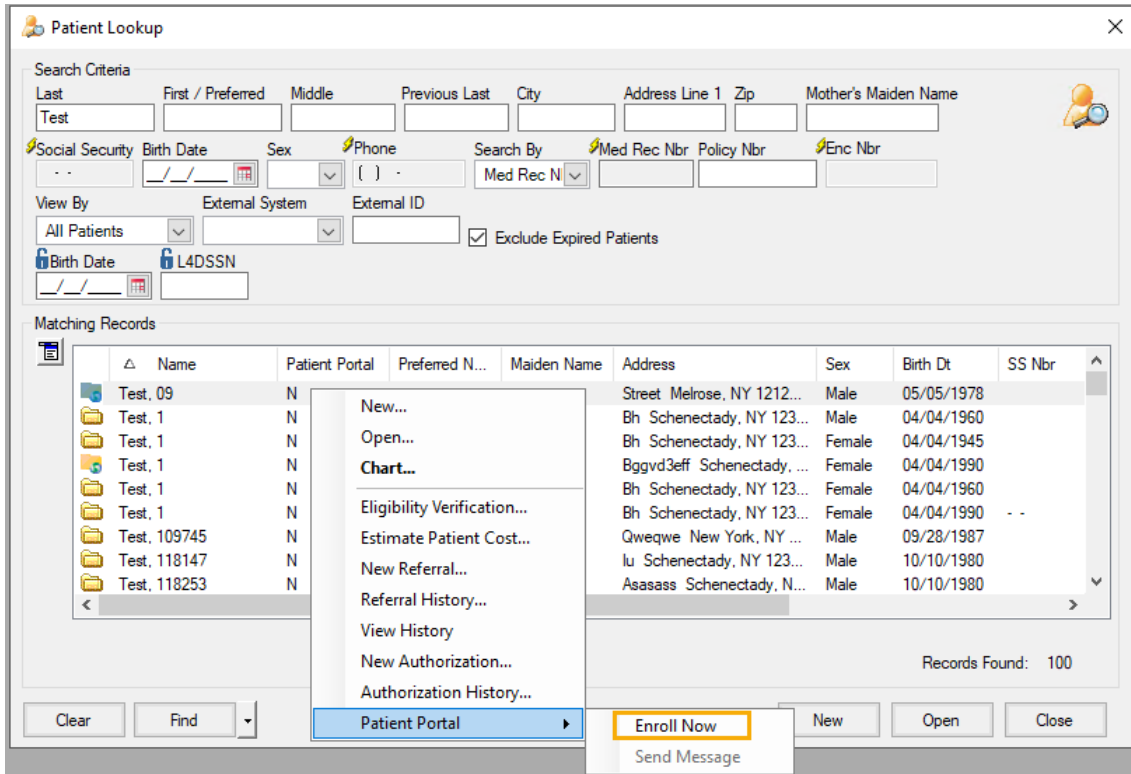
The following fields in Patient Demographics must be completed to manually send a portal invitation:

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).

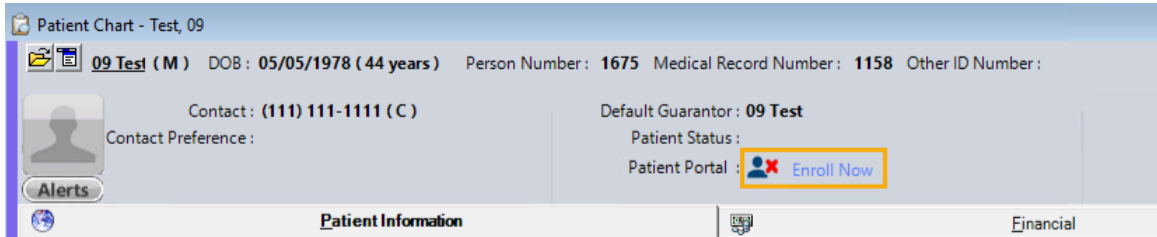
How to send a manual "on-demand" portal invite

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**

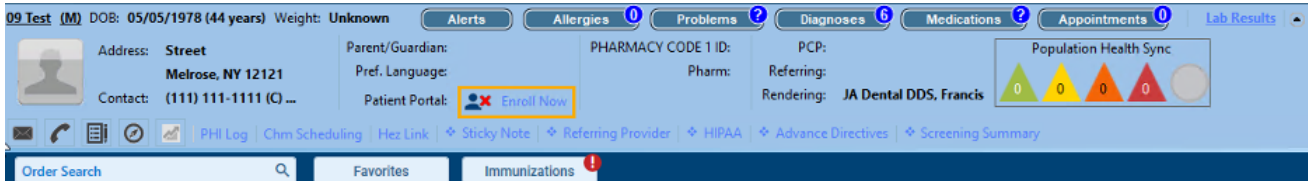


Option 2: Log in to NextGen Enterprise PM or EHR, search for the patient, and open the patient’s chart. In the patient’s banner, click the Patient Portal icon and select **Enroll Now**

PM Banner:



EHR Banner:



Attachment 1

Attachment 2

Attachment 3

Attachment 4

Attachment 5

Keywords "patient invites" "patient invitations" "portal invites" "portal invitations"

Legacy Article Number

Title NextGen PxP Portal Enrollments Overview

URL Name NextGen-PxP-Portal-Enrollments-Overview