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Policy: It is the policy of Shasta Community Health Center to provide patients and authorized family members or Care Managers the opportunity to enroll in a secure, confidential and easy to use Web site that gives patient and their families 24 hour access to elements of their medical records 24/7 and to their clinical team Monday through Friday 8:00 a.m. to 5:00 p.m.

Purpose: The NextMD Patient Portal uses technology to deliver secure communication between patients and clinical teams.

Scope:

- A. Primary: All clinical and front office staff
- B. Secondary: All other staff

Definitions:

- C. Portal – A secure Web site where patient medical information is stored
- D. Care Manager – An authorized person appointed to manage a patient’s Portal information
- E. Token – Documentation that authorizes a patient to enroll in the Portal
- F. Enrollment – The process of setting up a Portal account
- G. Activate - The patient process of activating an enrollment

Procedure:

- A. Benefits of the Portal
 1. Patients can view their Portal accounts anywhere they have Internet access. They can review parts of their medical record, request appointments and receive appointment reminders, cancel appointments, access important health information, view their medication list, request prescriptions, immunizations, test results, obtain educational information, and maintain account information. More features will be added in the future.
- B. Secure Messaging
 1. All electronic communication with patients must occur through NextMD Patient Portal. Responses to any communication received from a patient through the Portal should be sent the same day or at least within (2) business days. Messages do not go directly to clinicians. RN's handle all clinical related traffic. They will speak directly with the clinician if necessary.
 2. Patients are advised that the Portal is not appropriate for communicating urgent medical issues or anything that requires immediate attention.
 3. When new information is available in the Portal, a message is automatically sent to the patient’s email address, notifying him or her to log in to view the information.



There is never direct communication regarding clinical information to an external email address.

C. How to Send a Secure Message to a Patient

1. Sending messages to a patient through the Portal is as easy as using email
2. Access the NextGen Mailbox
 - a. Click the **Compose** button
 - b. The NextMD Message dialog box opens (Note: You can also right-click in the Communications Inbox message list and select **Compose New**)
 - c. Click the **To** button arrow to select a patient, internal user or group
 - d. Type the topic of the message in the **Subject** box
 - e. Either type your message or insert a standard response in the message box (Note: The appearance of the Standard Responses docking window is controlled from the right-click menu)
 - f. If needed, perform one or more of the following actions:
 - g. Set the message properties
 - i. Access the NextGen Mailbox
 - ii. From a new message, reply or draft, select the **Properties** tab
 - iii. In the **Send this message at** section, choose either **Normal priority** or **High priority**. An exclamation point appears next to the message in the Message list. (Note: You can also click the **Priority** button to toggle your choice)
 - h. Select the **I would like a read receipt for this message** check box to notify you that a message has been opened by the recipient(s)
 - i. If the patient is a recipient, you can select the **I would like a notification if not read in __ hours** check box to notify you that the message has not been opened by the patient within the number of hours you specify
 - j. Add any attachments (from a new message, reply or draft, select the **Attachments** tab. Each button has a functionality)
 - i. Add a documents from the patient's chart (you must have a patient selected as a recipient)
 - ii. Add an interactive Medical form (you can only add one interactive Medical form)
 - iii. Add a NextMD online form (you can only add one NextMD online form at a time)

Note: When adding a document from the patient's chart, a NextMD online form or an Interactive Medical form, the *Add An Attachment* dialog box displays. Select each item as needed and click **OK**
 - iv. Add a MS Word (doc or docx, Adobe Acrobat (pdf), image (.bmp, .jpg, .gif or .tif.) or HTML (.htm or .html) file
Note: The *Attach File* dialog box displays. Select each item as needed and either click **OK** or **Open**.
 - v. Remove an attached item



- k. Complete your message as needed
- l. Adding the original patient as a recipient:
 - i. Access the NextMD communications window
 - ii. Open a message that was sent or forwarded by a NextGen user or group that was originally initiated by a patient
 - iii. Click the **To** button arrow and select **Add Original Patient**
- m. Add a patient as a recipient for a NextMD message:
 - i. Access the NextMD communications window
 - ii. Either create a new message, open an existing message or open a draft
 - iii. Click the **To** button arrow and select **Add Patient**
 - iv. Enter your search criteria and click **Find**
 - v. Select the appropriate patient from the search results and click **Open**
- n. To add an internal user and/or group:
 - i. Access the NextMD communications window
 - ii. Either create a new message, open an existing message or open a draft
 - iii. Click the **To** button arrow and select **Add Users** (the *Select users and groups* dialog box displays)
 - iv. Enter your search string and click the **Search** button
 - v. Select the check box next to each user and/or group and then click **OK**
- o. Adding patients as recipients to a NextMD message using a memorized report:
 - i. Access the NextMD communications window
 - ii. Either create a new message, open an existing message or open a draft
 - iii. Click the **To** button arrow and select **Add Report**
 - iv. Select a report from the **Report Type** list
 - v. Double-click a report to open it
 - vi. Choose **Patient** from the **Settings List**
 - vii. Choose one of the following options:
 - **Include NextMD Patients**
 - **Exclude NextMD Patients**
 - **Only NextMD Patients**
 - viii. Select all other preferences as needed and then click **OK** (the patients found based on the reports results are added to the **To** field)
 - ix. To view the list of patients included in the report, double-click the **“Reports results...”**
 - x. Close the *Patient Set* and complete your message as needed
- p. Adding patients as recipients to NextMD messages using the Report Filter
 - i. Access the NextMD Communications window
 - ii. Either create a new message, open an existing message or open a draft
 - iii. Click the **To** button arrow and select **Report Filter**
 - iv. Choose **Patient** from the **Settings List**. Select one of the following options:
 - **Include NextMD Patients**
 - **Exclude NextMD Patients**



- **Only NextMD Patients**
 - v. Select all other preferences as needed and then click **OK**
 - vi. To view the list of patient included in the report, double-click the “**Reports results...**” link in the **To** field
 - vii. Close the *Patient Set* dialog box
- q. To complete your message click the **Send** button to send the message to the recipient(s)
- r. If the patient is a recipient click the **Send & Chart** button arrow to either:
 - iv. Send the response and add it to a new locked encounter
 - v. Send the response and add it to a new unlocked encounter
 - vi. Send the response and add it to an existing unlocked encounter
 - vii. Send the response without adding it to the patient’s chart
- s. Click the **Save** button to store the message in the Draft folder without sending it

D. Replying to NextMD Messages

1. Double-click a message in the Communications Inbox folder
 - a. At this point you can click a button to:
 - i. Forward the message
 - ii. Send a task
 - iii. Mark the message complete
 - b. If the patient is a recipient, you can click a button to:
 - i. Open the patient’s chart
 - ii. Add the message to the patient’s chart as either a new locked encounter, a new unlocked encounter or attach it to an existing unlocked encounter
 - c. To respond to just the sender, click the **Reply** button
 - d. To respond to the patient or all users included in the **To** field, click the **Reply** button arrow and make a selection (the *NextMD Message* dialog box opens and displays the contents of the original message)
 - i. You can then include additional recipients
 - ii. Set the message properties
 - iii. Add any attachments
 - e. Either type your response or insert a standard response in the **Message** section
 - f. To complete your response, either:
 - i. Click the **Send** button to send the message to the recent(s)
 - ii. If the patient is a recipient, click the **Send & Chart** button arrow to either:
 - Send the response and add it to a new locked encounter
 - Send the response and add it to a new unlocked encounter
 - Send the response and add it to an existing unlocked encounter
 - Send the response without adding it to the patient’s chart
 - iii. Click the **Save** button to store the message in the Draft folder without sending it

**E. Forwarding NextMD messages**

1. Double-click a message in the Communications Inbox folder
2. Click the **Forward** button
 - i. The *Select users and groups* dialog box displays
 - ii. Select the check box next to each user and/or group and then click **OK**
 - If you cannot find a user or group, enter a search string in the field provided and click the search button
3. Complete your message as needed

F. Test Results are only available via messaging through the Portal at this time**G. Prescription Refill Requests**

1. Access the NextMD Communications window.
2. Double-click a message in the Prescriptions Inbox folder.
3. At this point you can click a button to:
 - a. Open the patient's chart to review medication history
 - b. Assign a task
 - c. Forward the request
 - d. Add a comment
 - e. Print the request
4. To respond to the request click the **Respond** button.
5. By default, the Prescription Renewal Status is set to "Approved."
6. To reject the request, click **Approved**.
 - a. The Prescription Renewal Status changes to "Denied."
 - b. You must also add medication updates to the patient's chart via the Medication module
7. Either enter your response or insert a standard response.
8. Click the **Send & Chart** button arrow and choose one of the following actions:
 - a. Send the response and add it to the patient's chart as a new locked encounter
 - b. Send the response and add it to the patient's chart as a new unlocked encounter
 - c. Send the response and add it to one of the patient's existing unlocked encounters
 - d. Send the response, but do not add it to the patient's chart
 - e. A response is sent to the patient and adds the request to the Prescription Outbox

H. Adolescent Patients

1. Patients age 0-12 years have a Care Manager who is either a parent or guardian. At age 13 they may sign up for their own NextMD account and they can access their record independently through the Portal and their own confidential email.
2. Once an adolescent approaches age 13, we will send a message notifying the Care Manager that the adolescent's Portal account will end.



3. State law requires special handling of adolescent's records once they reach age 13. Parents still have full access through our Health Information Services Department, except for very specific conditions and diagnoses that require the adolescent's consent prior to releasing the information.
- I. Locking a patient's Portal account
2. A Portal account may be deactivated for the following reasons:
 - a. A patient reaches age 13
 - b. A patient requests a deactivation
 - c. A care manager change request
 - d. A patient terminates care
 - e. The center discharges the patient
 - f. A patient violates the Portal terms, uses abusive language or use of the Portal for emergencies.
 - g. A patient expires
 - h. If a SCHC employee feels that a patient is using abusive language or is repeatedly violating the terms and conditions of use, the employee should complete an incident report.
- J. Automated Responses
1. From a NextMD dialog box, such as an appointment request, where you can enter comments, click Add Comments.
 2. Enter your comments. If needed, you can insert a standard response
 3. Right-click a text box where you can enter comments and select Show Standard Responses.
 4. To move the Standard Responses docking window to other parts of the Comments section or have it float outside, click the Standard Responses title bar and drag it. When you drag the window in the Comments section, a guide diamond that allows you dock the window to any side, displays. When the window is not docked, it floats on top of other windows.
 5. Drag the window over a guide diamond to dock it. When you dock the window, a set of buttons appear in the title bar.
 6. Use these buttons to hide, auto hide (displays a Standard Responses tab that expands when selected) or float the window.
 7. To preview the response as a Tool Tip, move your pointing device over a response.
 8. To view it in the preview pane, single-click the response.
 9. To insert a response, select it from the Standard Responses window and either drag it into the Comments/Reply section or double-click it.
 10. If needed, you can edit the response and/or right-click in the right pane to insert a practice or person/patient information (name, address, etc.) field.
 11. In needed, click OK to close the Enter comment dialog box.
 12. Complete your message/request as needed
 13. Click OK



14. Complete your message/request as needed.

K. Patient Enrollment/Sign Up

1. Patients and their legal guardians can sign up for Patient Portal in accordance to the terms and conditions of the Web site, if they have a Primary Care Clinician at SCHC and a valid email address.
2. At registration, Visit Coordinators (VCs) will check a patient's NextMD status.
3. If a patient does not have a NextMD account, the VCs will make every effort to provide guidance and offer assistance with the sign up process to patients.
4. The VCs will print the NextMD token and other information with instructions on how to sign up if the patient decides to do his/her own activation at home.
5. Further assistance with enrollment will be provided by the Patient Portal Coordinator.

L. Enrollment Instructions:

1. At the health center:
 - a. Provide patient the NextMD Patient Portal Enrollment Form
 - b. Ask if there is a **Care Manager** or **Dependent** to add. Dependents can be added to the back of the Enrollment form. A Patient Portal Proxy Access Form for Care Managers must be signed before adding a spouse/significant other as Care Manager
 - c. In the E.H.R. pull up the guarantor; then go to **File**; scroll down to **NextMD, Enrollment** and then **Manage Enrollment**
 - d. If patient is already enrolled all options under **Manage Enrollment** will show in bold. Plus, there is a tiny **NextMD** icon that will show near the bottom right of the screen
 - e. Add children under guarantor's account. Click **Add Dependent** and look child /children up by birth date and name. Add children; verify email; click print. You will click print for each person listed. The print box will then disappear. Two pages should print, the first page is the Token and the second is the Terms and Conditions.
 - f. Each person should have a different numbered token. If for some reason all have the same Token, you can create a new one
 - g. Spouse/significant other can be added by clicking **Add Care Manager**. Verify email. Click on **print** ensuring you have selected the correct printer
 - h. Click **OK** to close out of E.H.R. account
 - i. Bring up NextMD.com; click on the **Enrollment** button
 - j. Enter the Token and valid email address. Sometimes an error message will pop up; make sure that the token and email have been input correctly. Click on the Terms and Conditions box. Note: It takes a few moments for the information to process
 - k. Enter the user name; password; and security question. The password and security questions must be entered twice. Verify all information before submitting. If everything was input correctly, the Inbox will appear.



2. At the patient's home
 - a. If the patient cannot stay for you to finish the enrollment in person, copy Enrollment Form and give the patient the original form along with the NextMD token and terms and conditions. Use the copy to finish the enrollment.

M. Help Desk

1. Contact the Patient Portal Coordinator or the Information Technology Department

N. Related Documents: Patient Portal Clinician List