

## Patient Portal: Regenerating an Expired PIN

Step 1. Verify email address has been entered in NextGen

Step 2. If it has been 30 days or more since the PIN was created; a PIN must be regenerated for the patient by completing the following:

From the patient Chart; start an Update by clicking the Update button

Choose Encounter Type: Portal Pin Generator

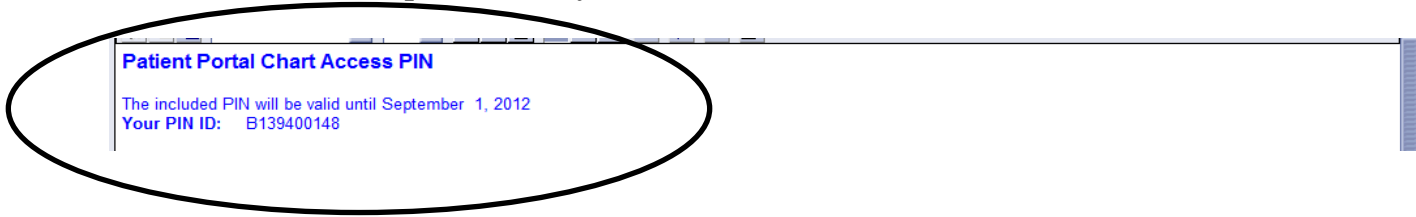
### NEW PROCESS:

Change the provider to the PCP or for Specialist offices change to the responsible provider for the patient. (Would not be the PCP if the PIN is generated in a TCMA Specialist office.)

Click OK.

Click Regenerate.

A new Pin is now generated in the patients chart...  
Please note the PIN will expire in 30 days.



Click Close.

A screenshot of the "Pin Generator: Bob Test" form. The form is titled "Patient Portal Chart Access PIN" and contains the text: "This form creates a unique patient portal PIN for the patient." Below this, there are two fields: "Activation Status: Active" and "PIN: B122900125". A red message states: "These changes will take place when this document is signed". Below this, it says "Pin Generator Form v1.5". At the bottom, there are three buttons: "Prev Form (Ctrl+PgUp)", "Next Form (Ctrl+PgDn)", and "Close". The "Close" button is circled in black.

Click End Update.



Click Remove so that this document is not routed to the provider's desktop.

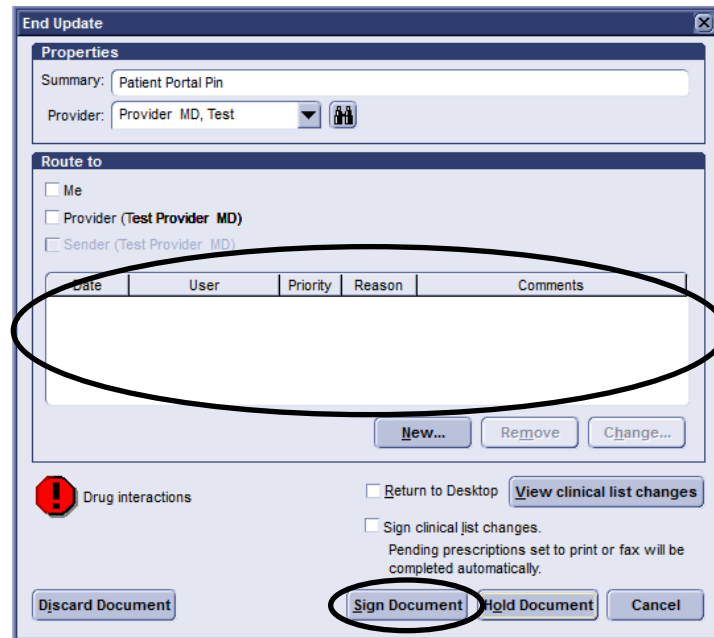
A screenshot of the "End Update" dialog box. The dialog box has a "Properties" section with "Summary: Patient Portal Pin" and "Provider: Provider MD, Test". Below this is a "Route to" section with three checkboxes: "Me", "Provider (Test Provider MD)" (which is checked), and "Sender (Test Provider MD)". Below the checkboxes is a table with the following data:

Date	User	Priority	Reason	Comments
08/02/2011	Test Provider MD	Normal	Action	Complete document

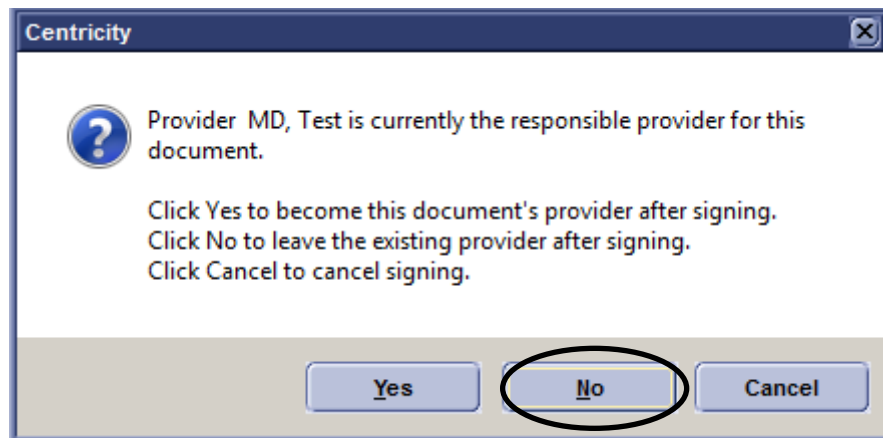
At the bottom of the "Route to" section are three buttons: "New...", "Remove" (which is circled in black), and "Change...". Below the "Route to" section is a "Drug interactions" section with a red exclamation mark icon and the text "Drug interactions". To the right of this section are two checkboxes: "Return to Desktop" and "Sign clinical list changes". Below these checkboxes is a button labeled "View clinical list changes". At the bottom of the dialog box are four buttons: "Discard Document", "Sign Document", "Hold Document", and "Cancel".

There should not be any names in the Route to box.

Click Sign Document.



Click, No at the prompt to become the responsible provider of this document.



### **New Process:**

The PIN Welcome letter will no longer be generated and presented to the patient. Instead, an Email Enrollment Notification will now be created and sent via secure messaging.

See handout, **Patient Portal: Email Enrollment Notification** for instructions.