

e-MDs Solution Series™

Patient Portal Users Guide

Version 7.2

How to Use the Patient Portal

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What is the Patient Portal?

The Patient Portal is a web-based system that serves as a secure communication link between you and the clinic. When you log in to the Portal with your private user name and password, you can see information that is pulled from your electronic record at the clinic and displayed on the web page.

After logging in to Portal, you can:

- Use the messaging feature to communicate with clinic staff.
- View your health summary information.
- Send health summary information update requests if you notice missing information.
- View results of lab and other diagnostic tests.
- Schedule, confirm, cancel, or reschedule an appointment.
- Add an appointment request to your wait list.
- Request a referral or a medication refill.
- Print or save an electronic copy of your Health Summary or last office visit using the standard record and document formats.

Note: Some clinics do not use all of the features available with the Patient Portal. Check with your clinic about which features are available for you to use.

Your clinic can set up their Portal to send you a Notification e-mail whenever you receive a message in the Patient Portal. This e-mail only lets you know you have received a new message on the Portal and provides a link to access the Portal.

The Patient Portal Home Page

When your clinic creates a Patient Portal account for you, a message will be sent to the e-mail address you provided to the clinic. The message will contain the **URL** (Internet address) for your clinic's Patient Portal. It will also contain a **user name** and **password**, which you must use to log in to the Portal.

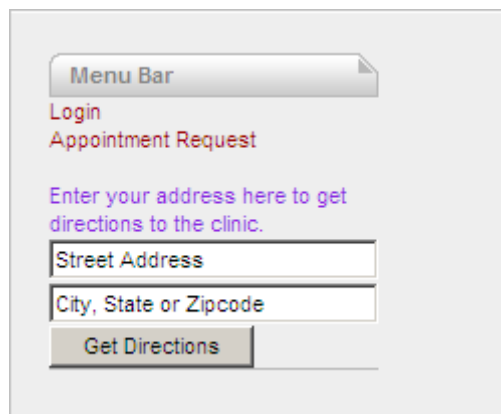
To access the clinic's Patient Portal:

1. Open a Web browser.
2. Type the clinic's Patient Portal URL in the address field of the browser.
3. Press the **Enter** key.

The Portal home should be displayed in your browser.

Note: Some clinics provide a link to the Portal on their website. If so, you can simply click the link to access the Patient Portal.

When you access your clinic's Patient Portal, notice that there is a Menu Bar located on the left side of the home page. From the Menu Bar, you can get directions to the clinic, request an appointment, or log in to the Portal.



The image shows a screenshot of a web page's menu bar. At the top is a grey box labeled "Menu Bar". Below it are two links: "Login" and "Appointment Request", both in red text. Underneath these links is a purple text prompt: "Enter your address here to get directions to the clinic." Below this prompt are two input fields: "Street Address" and "City, State or Zipcode". At the bottom of the form is a "Get Directions" button.

Before you can access your personal information through the Portal, you must log in using the user name and password provided in the e-mail mentioned above, but you can request an appointment or get directions to the clinic *before* you log in.

To request an appointment without logging in to the Portal:

If you *do not* have a Patient Portal user name and password, you can still request an appointment using the link on the Portal home page. Your request will be forwarded to the clinic's waiting list.

1. Click the **Appointment Request** link in the Menu Bar of your clinic's Portal home page.
2. Read and respond to the Disclaimer message by clicking the **Agree** radio button, then click the **Continue** button. *The New Patient Appointment Request screen displays.*

3. Enter all requested information, and then click **Submit Request**.

A Portal message displays a confirmation that your request has been received and added to the appointment wait list.

4. Click the **Done** button.

The clinic is notified of the appointment request, and a message is sent to the e-mail address you provided when requesting the appointment.

To get directions to the clinic:

1. In the Menu Bar of the Portal home page, type your street address in the fields provided.
2. Click **Get Directions**. This function opens a link to Yahoo! Maps™. You can print the resulting maps and driving directions.

To log in to Portal:

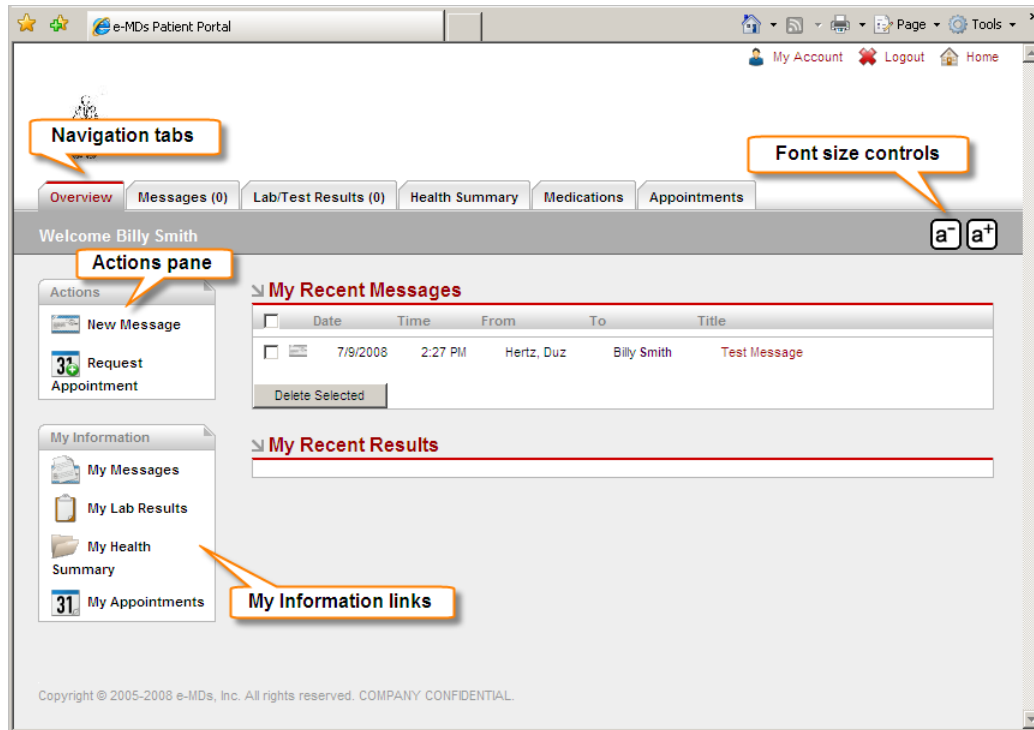
1. Click on the **Login** link in the Menu Bar. The Login window displays.

2. Enter your Portal *user name* and *password* in the fields provided.
3. Click the **Login** button.

After you log in, it is good practice to change your password and add a security question for your Portal account. (Instructions for updating your Portal account password are included in this user guide.) Note that when you change your Portal password, the system sends a message to the e-mail account that you provided to the clinic. The message is simply a notification of a change to your account and does not include any password information.

Introducing the Portal Interface

Although your clinic's Portal may have a different appearance and may not include all the items shown here, the general layout and functionality will be similar.



Click a **navigation tab** to access the information indicated by the label on the tab. Note that a number is displayed next to the label on the **Messages** and **Lab/Test Results** tabs. This number tells you how many new (unread) messages or test results you have.

The **font size controls** allow you to increase or decrease the size of the text in the Portal window.

When you log in to the Patient Portal, the **Overview** tab is selected by default. On the **Overview** tab, notice the **Actions** section and the **My Information** links. The **Actions** section provides quick access to most Portal functions, and you can click on the links in **My Information** to access the tab containing the information indicated.

Functions and information available on each tab are explained in subsequent parts of this documentation.

Communicating through the Portal

The Portal provides a convenient communication link between you and your clinic. For example, you might use Portal to send a message to a particular staff member, request a referral, request a medication refill, or schedule an appointment.

Communications your clinic might send through the Portal include lab and test results, responses to requests you submitted through the Portal, messages requesting information, or general announcements sent to all Portal patients.

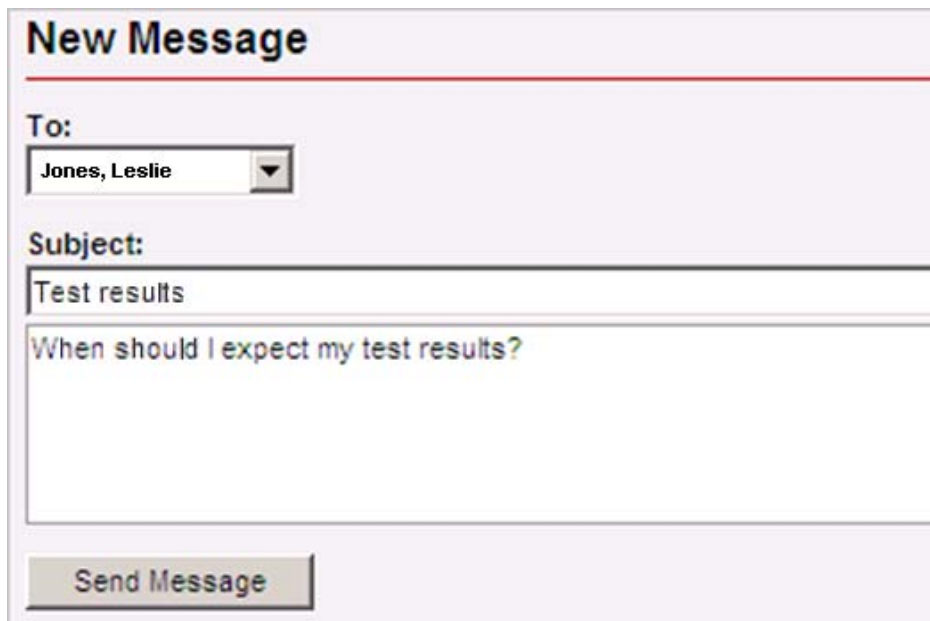
You can view all communications from the clinic through your Portal Inbox on the **Messages** tab. Attachments may be included with communications sent by the clinic.

Sending Messages to Clinic Staff

If your clinic has enabled the messaging feature of Portal, you can use the Portal to send a new message to or respond to a message sent by your clinic.

To send a new message to a clinic staff member:

1. On the main Portal screen, click the **Messages** tab.
2. In the **Actions** section of the **Messages** tab, click the **New Message** link.
3. In the **To** field of the New Message window, click the down arrow and then click the name of the person to whom you want to send the message.
4. In the **Subject** field, type a few words to describe what the message is about.
5. Type the message in the space below the **Subject** field and click **Send Message**.



New Message

To:
Jones, Leslie

Subject:
Test results

When should I expect my test results?

Send Message

To reply to a message from clinic staff:

1. Click on the title of the message to open the message.
2. In the **Actions** section of the message, click **Reply to Message**.
3. Type your response in the space provided, then click **Send Message**.

Receiving Your Lab or Test Results from the Clinic

When the clinic sends a message containing lab or test results through the Patient Portal, you may access the message in several places.

When the message first arrives, it will be in the **My Recent Messages** and **My Recent Results** sections on the **Overview** tab.

The screenshot shows the Patient Portal interface. At the top, there are navigation tabs: Overview, Messages (0), Lab/Test Results (0), Health Summary, Medications, and Appointments. Below the tabs is a green banner with the text "Welcome Pam Inez". On the left side, there are two panels: "Actions" with "New Message" and "Request Appointment" (with a "3" badge), and "My Information" with "My Messages", "My Lab Results", "My Health Summary", and "My Appointments" (with a "31" badge). The main content area is divided into two sections: "My Recent Messages" and "My Recent Results". Each section contains a table with columns for Date, Time, From, To, and Title. In the "My Recent Messages" section, the first row has a title "Lab" highlighted with a red box, and the second row has a title "Test Message". In the "My Recent Results" section, the first row has a title "Lab" highlighted with a red box. Below each table is a "Delete Selected" button.

On the **Messages** tab, the message will be included in the **Inbox** section with all other messages.

The screenshot shows the "Inbox" section of the Patient Portal. It contains a table with columns for Date, Time, From, To, and Title. The first row has a title "Lab" highlighted with a red box, and the second row has a title "Test Message". Below the table is a "Delete Selected" button.

And on the **Lab/Test Results** tab, the message will be in the **My Test Results** section.

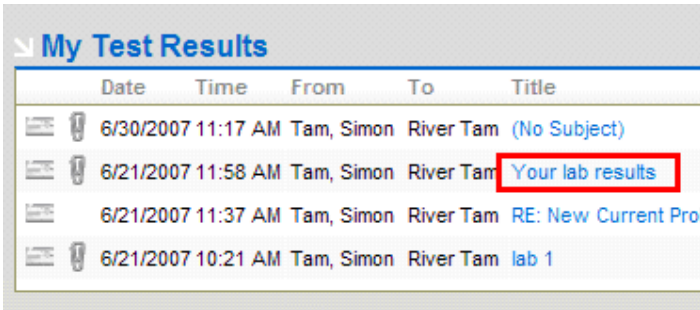
The screenshot shows the "My Test Results" section of the Patient Portal. It contains a table with columns for Date, Time, From, To, and Title. The first row has a title "Lab" highlighted with a red box. Below the table is a "Delete Selected" button.

Note: If you delete a message from *any* of these locations, *the message will be deleted from all of the locations.*

The clinic may send test results as an attachment (a file attached to the message). Some attachments can be viewed in the message window of Portal, but some may require a different program (such as a word processor) in order to open them.

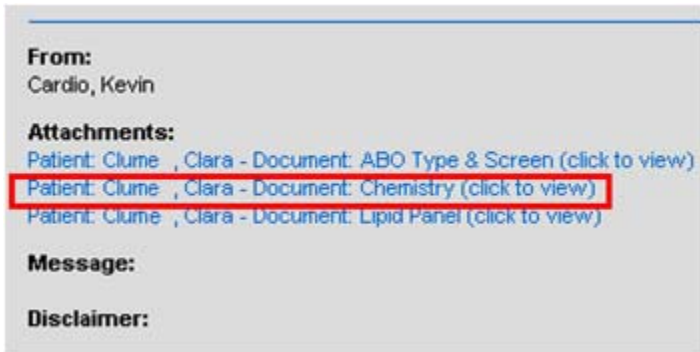
To view lab or test results:

1. Click the title of the message.



The messages containing lab or test results may include message attachments. An attachment is indicated by the “paperclip” icon appearing to the left of the message date. In this example, result data was sent as three attachments.

2. To view these results, click the *title of the attachment*.



When you click the attachment title, results are displayed (unless the attachment is a file type that requires a program that is not available on your computer and that cannot be displayed in the Portal). Shown here are Chemistry lab results. Results displayed in red text indicate out of normal range for that result.

Patient: LEE, RILEY	DOB: 9/23/2000	Sex: Male	Provider: ANDERSON, CATHY	
Specimen: 18959699990	Requisition: 18959699990			
Lab Receipt: 2/23/2003 12:00:00 AM	Collection: 2/23/2003 12:00:00 AM	Results: 2/23/2003 2:30:00 PM		
Description	Out-of-Range	In-Range	Units	Expected
Hemoglobin A1c	6.1		%	4.5-5.7
Cholesterol, Total		172	mg/dL	100-199
Triglycerides	161		mg/dL	0-149
HDL Cholesterol	45		mg/dL	40-59
LDL Cholesterol Calc		122	mg/dL	0-99
Microalbum.,U,Random		8.3	mcg/mL	0-30

3. To print the message, click the printer icon in the toolbar of your browser, or right-click the message and select **Print** from the pop-up menu.
4. To save the message to your computer, click the **File** menu and select **Save As**.

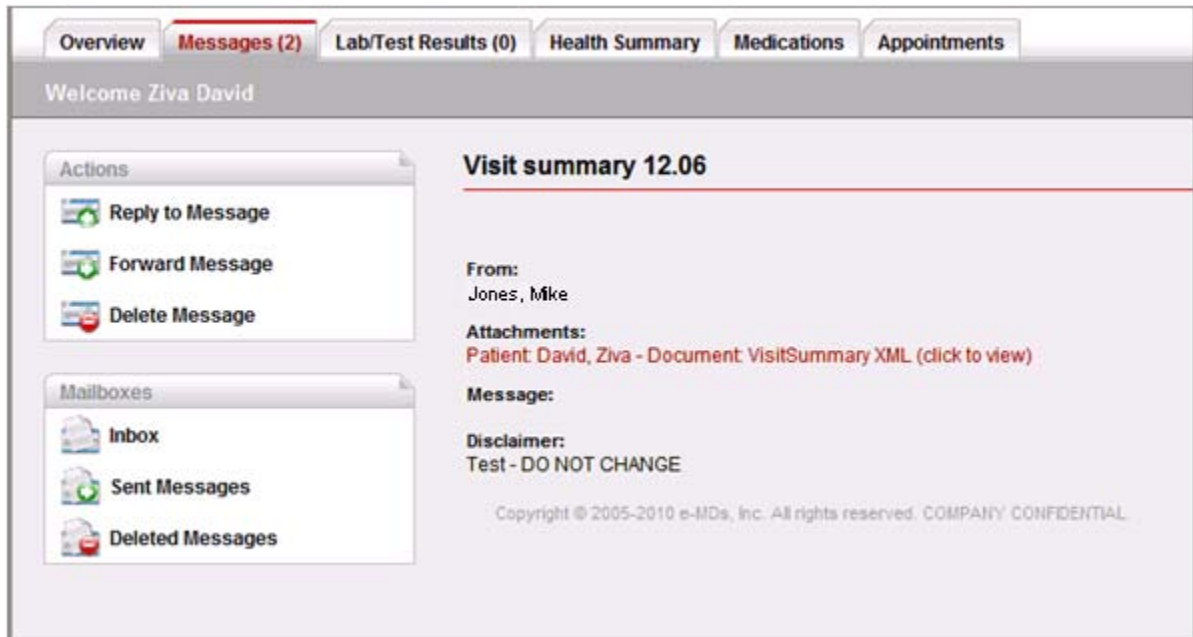
Viewing Your Last Visit Summary

When you visit your clinic, a summary of the visit is prepared in CCD format and is sent to your Portal account (if you currently have an account on record).

When the message first arrives, it will be in the **My Recent Messages** section on the **Overview** tab and on the **Messages** tab in the **Inbox** section with all other messages.

To view your visit summary:

1. Click the title of the message to list the attachments.



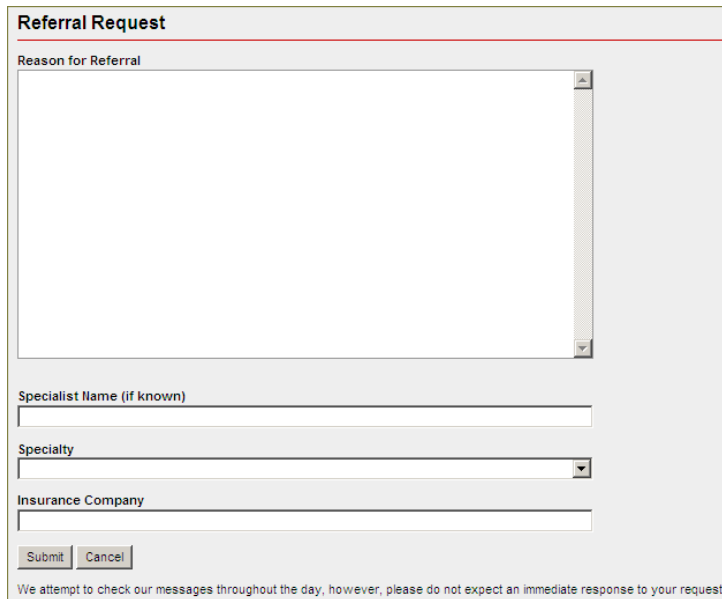
2. Click the *title of the attachment* to view the Visit Summary.
3. To print the attachment (Visit Summary), click the printer icon in the toolbar of your browser.
4. To save the Visit Summary to your computer, click the **File** menu and select **Save As**.

Requesting a Physician Referral

Some clinics allow patients to request physician referrals through the Patient Portal. If your clinic uses this feature, and you choose to use the Portal to request a referral to a specialist, you will need to indicate the type of specialist you need and the name of the specialist (if known) when you submit this request.

To request a physician referral:

1. On the main Portal screen, click the **Messages** tab.
2. In the **Actions** section of the **Messages** tab, click **Request Referral**. The Referral Request form displays.



3. Type the reason you are requesting the referral and provide the name of the specialist (if known).
4. To indicate the type of specialist desired, click the down-arrow to the right of the **Specialty** field, and then select a specialty from the drop-down list.
5. Provide the *name of your insurance company* in the field provided, and then click the **Submit** button to send the request to your clinic.

Note: One staff member is assigned to receive all the referral requests submitted through the Portal, so there is no option to select the person to whom the request will be sent.

Asking a Billing Question

If your clinic has enabled this Portal feature, you can submit billing questions through the Patient Portal.

To ask a billing question:

1. On the main Portal screen, click the **Messages** tab.
2. In the **Actions** section of the **Messages** tab, click **Billing Question**.
3. Type your question in the field provided, then click the **Send** button.

Note: One staff member is assigned to receive all Portal messages about Billing, so there is no option to select the person to whom the message will be sent.

Submitting a Portal Suggestion

If your clinic has enabled this Portal feature, you can give your clinic feedback on ways to improve their Patient portal.

To submit a Portal suggestion:

1. On the main Portal screen, click the **Messages** tab.
2. In the **Actions** section, click **Portal Suggestion**.
3. Type your suggestion in the field provided.
4. To submit to the clinic, click the **Send** button.

Note: One staff member is assigned to receive all Portal suggestions, so there is no option to select the person to whom the suggestion will be sent.

Requesting a Medication Refill

Some clinics allow patients to use the Patient Portal to request a refill for an existing prescription. Refill requests sent to the clinic through the Portal must be reviewed and approved by a clinic provider before they will be refilled.

To request a medication refill:

1. On the main Portal screen, click the **Medications** tab.
2. To request a medication refill, click the check box to the left of each medication to be refilled, and then click **Request Refill** (located in the **Actions** section).

Refill Qty	Drug	Physician	Prescribed
<input type="checkbox"/>	0.00 Zantac	,	8/10/2005
<input type="checkbox"/>	0.00 Demerol HCl	,	8/10/2005
<input checked="" type="checkbox"/>	0.00 Phenergan	,	8/10/2005
<input type="checkbox"/>	0.00 Trazodone HCl	,	8/10/2005
<input checked="" type="checkbox"/>	0.00 Carafate	,	8/10/2005
<input type="checkbox"/>	0.00 Toprol XL	,	8/10/2005

When you click **Request Refill**, all medications you selected for refill appear in a **Medication Refill Requests** section and a notes field is provided for additional information, such as name and address of the pharmacy where you would like the prescription to be filled. Although the clinic may have the original pharmacy information, it is a good idea to confirm all information here, especially address and phone number to identify the specific branch of the pharmacy.

3. Type any additional information concerning the refill in the notes field, and then click the **Send Request** button.

Please include the name and address of the pharmacy where you would like the prescription filled as well as any additional information you would like your provider to know regarding this refill request.
Maximum of 210 characters allowed.

The notes will apply to all medication requests.

Send Request Cancel

We attempt to check our messages throughout the day, however, please do not expect an immediate response

Note: One staff member is assigned to receive all the refill requests sent via the Portal, so there is no option to select the person to whom the request will be sent.

Requesting an Appointment

Your clinic may allow you to schedule appointments through the Portal directly into their scheduling system. This is called *Open Access* scheduling. If your clinic does not allow Open Access scheduling, you can use the Portal to request an appointment for a particular date and time, and your request will be routed to the clinic's waiting list. The following instructions for requesting an appointment apply to clinics who allow Open Access scheduling as well as clinics who do not allow Open Access scheduling.

To request an appointment:

1. To schedule an appointment, click the **Appointments** tab.

Current and pending appointments are displayed. Notice the **Actions** section on the left side of the **Appointments** tab.

Overview Messages (0) Lab/Test Results (0) Health Summary Medications **Appointments**

Welcome Billy Acuna

Actions

33 Request Appointment

Upcoming Scheduled Appointments(1)

Date	Time	Physician	Clinic Name	Visit Reason	Notes
07/30/2008	9:15	Jones, Mike	Robin's Remarkable Remedies	BP check	

Appointment Requests Awaiting Clinic Processing(1)

From Date	To Date	Physician	Clinic Name	Visit Reason	Notes
07/15/2008	07/16/2008	Jones, Mike	Robin's Remarkable Remedies	headache	An appointment was requested on any day from 7/15/2008 to 7/16/2008 between 9:00 AM and 2:00 PM with Hertz, Duz.

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2. In the **Actions** section, click **Request Appointment**.
3. Read and respond to the Disclaimer message by clicking the **Agree** button, and then click **Continue**. The Appointment Request Form displays.

Appointment Request Form

What is the main reason for the visit?
Select Visit Reason

Please specify the reason if not listed:

Any additional information we need to know?

Submit Request

4. Indicate a *main reason* for the visit by clicking the down arrow, and then selecting a reason from the drop-down list.

Note: If your visit reason is not listed, you can select **Other**. If you do select **Other** as your main reason, you must complete the field labeled **Please specify the reason if not listed**.

5. Add any additional information about your appointment request that will be helpful for the practice to know. For example, you might describe the symptoms you are experiencing.
6. When all required information is entered, click the **Submit Request** button. Additional fields are displayed for appointment details.

Select the date/time range, facility, and provider you would like for your appointment.

Request Type:

Search for specific appointment time

Contact me if a time is available

First Available Appointment

Start Date:

End Date:

Time Range:

from

to

* Select a Provider:

* Select a Facility:


* Indicates a required field. You must set these items to search for available appointment slots. If the "First Available Appointment" option is not set, then please set the dates and time range accordingly.

7. Select an appointment **Request Type**.

Note: If your clinic provides *Open Access* scheduling (that is, your clinic allows you to schedule your appointment directly in their scheduling system) and you want to use this feature, you can select **Search for specific appointment time**. Otherwise, select **Contact me if a time is available**, and your request will be added to the clinic's waiting list.

- To be seen as soon as practicable, click the **First Available Appointment** option.

Note: Selecting this option *does not* allow you to enter a preferred date or time.

- To indicate an appointment date range preference, click an ellipsis button  to display a calendar. Click a date in the calendar to select the date.
- To select a preferred from or to time range for the appointment, click the down-arrow in a time field and click a time to select it.
- To indicate a provider preference for your appointment request, click the down-arrow, then select (click) your choice from the drop-down list.

Note: This field is automatically set to the provider listed for you at the clinic, but you can change this selection.

- To indicate a facility preference for your appointment request (if applicable), click the down-arrow, then select (click) your choice from the drop-down list.

8. After you have completed all required fields for the appointment request, click **Submit Request**.

- If you selected **Other** as the main reason for the visit, a confirmation message is displayed, your request is sent to the clinic's scheduling Waiting List, and the appointment appears in your list of appointment requests waiting for clinic processing. You will also receive an e-mail message confirming receipt of your request. After the clinic processes the request, it will move to the confirmed appointments list with an appointment date and time.

- If you selected a main reason for your visit (not **Other**), and you selected **Search for a Specific Appointment Time**, an appointment grid displays at the bottom of your screen.

Select Slot	Appointment Date	Appointment Start Time	Provider
Select	8/20/2008	8:00 AM	Jones, M M
Select	8/20/2008	8:15 AM	Jones, M M
Select	8/20/2008	8:30 AM	Jones, M M
Select	8/20/2008	8:45 AM	Jones, M M
Select	8/20/2008	9:00 AM	Jones, M M
Select	8/20/2008	9:15 AM	Jones, M M
Select	8/20/2008	9:30 AM	Jones, M M
Select	8/20/2008	9:45 AM	Jones, M M
Select	8/20/2008	1:00 PM	Jones, M M
Select	8/20/2008	1:20 PM	Jones, M M
Select	8/20/2008	1:40 PM	Jones, M M
Select	8/20/2008	2:00 PM	Jones, M M
Select	8/20/2008	2:20 PM	Jones, M M
Select	8/20/2008	2:40 PM	Jones, M M

- To choose one of the listed appointments, click the word **Select** next to the desired date and time, and then click **Submit Request**. The system displays an appointment confirmation message, and you will receive a confirmation message in your Portal Inbox.

You can view your appointments by clicking the **Appointments** tab. The **Upcoming Scheduled Appointments** section shows appointments that have already been scheduled.

If you have requested appointments through the Portal, but the appointments have not yet been scheduled by the clinic, the requested appointments are shown in the **Appointment Requests Awaiting Clinic Processing** section.

Confirming, Cancelling, or Rescheduling an Appointment

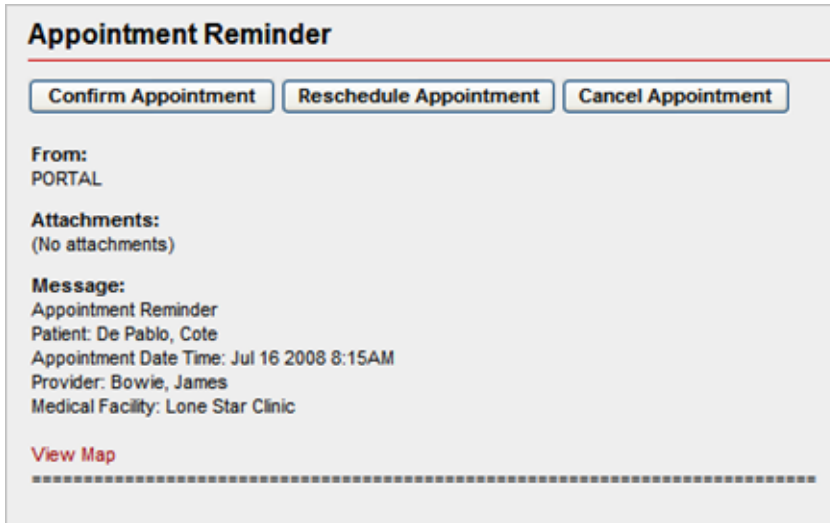
At some point before a scheduled appointment, you may receive a Portal message with “Appointment Reminder” as the message title.

To confirm, cancel or reschedule an appointment:

- Click the title of the message to open it.

When you open the reminder, three buttons are displayed in the message: **Confirm Appointment**, **Reschedule Appointment**, and **Cancel Appointment**. Appointment time, date, provider, and facility are also included in the message.

Note: If the **Reschedule** option and the **Cancel** option are not available, the clinic may not allow rescheduling and cancelling appointments within a certain number of days before the appointment.



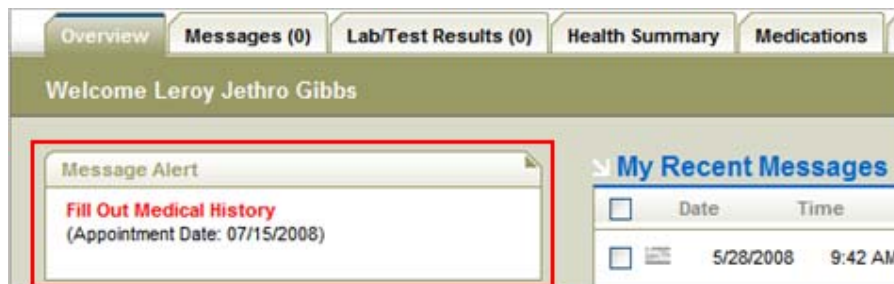
2. If you click **Confirm Appointment**, a message is sent to the clinic confirming the appointment.
3. If you click **Reschedule Appointment**, a calendar appears. Click a *date* on the calendar and all available appointments on that day are displayed.

Note: Only appointments for the provider with which you were scheduled on the original appointment are displayed. *If you want to see a different provider, you must cancel this appointment and set up a new appointment.*

- If you click on one of the available appointments, your appointment is rescheduled to that date and time, the rescheduled appointment information is reflected in the **Notes** column on the **Appointments** tab in Portal and in the text under the title of the **Appointment Reminder** message, and another appointment confirmation message will be sent.
- If you click **Cancel Appointment**, the clinic is notified of the cancellation, and the appointment is removed from the Appointments tab.

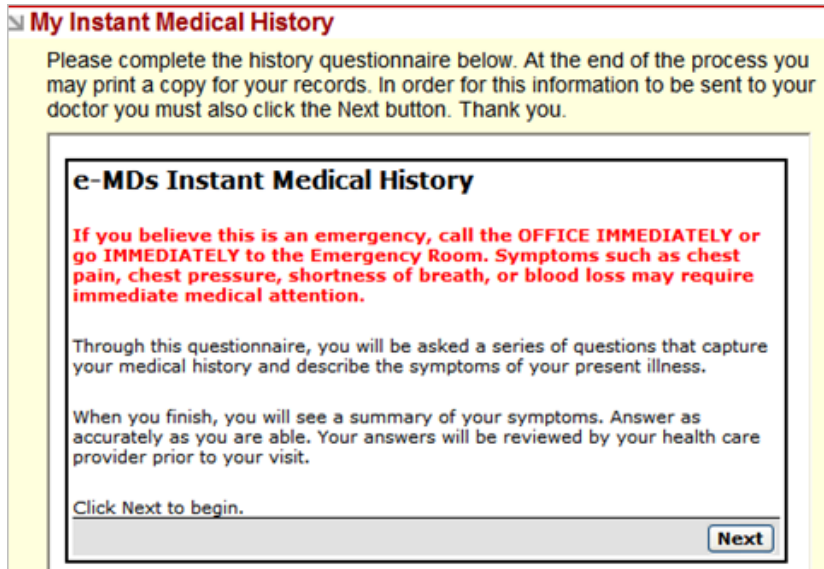
Filling Out the Medical History (Message Alert)

For certain types of appointments, your doctor may request that you fill out a medical history questionnaire. If so, once the appointment has been confirmed, an alert will be displayed on the Overview tab in Portal.



To fill out a medical history:

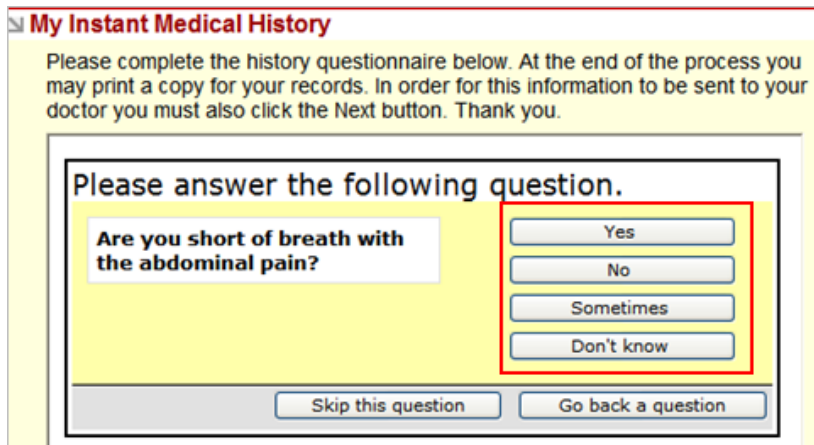
1. Click the red **Fill Out Medical History** link.
My Instant Medical History displays as shown below.



2. Read the information, and then click **Next**.

A series of questions will be displayed. The questions will vary, depending on the visit reason for your scheduled appointment.

3. Read each question, then click one of the answer buttons to go to the next question. Notice that there are buttons below the question section that allow you to skip the question or go back to the previous question.



4. After you have answered the questions, all the questions and the answers you selected are displayed.

My Instant Medical History

Please complete the history questionnaire below. At the end of the process you may print a copy for your records. In order for this information to be sent to your doctor you must also click the Next button. Thank you.

stomach pain.

Timing
 He reported: Intermittent stomach pain. Stomach pain occurs at night.
 He denied: Abdominal pain interrupts sleep.

Context
 He reported: Stomach pain is the main reason for my visit.

Associated Signs and Symptoms
 He reported: Stomach pain sometimes accompanied by nausea.
 He denied: Abdominal pain associated with chest pain. Sweat or perspire with the abdominal pain. Vomited with the abdominal pain. Loose bowel movements.

Review of Systems

Constitutional
 He denied: Fever associated with abdominal pain.

Genitourinary
 He denied: Painful urination.

Note that the **Save** and **Print** buttons below the questions and answers. It is a good practice to print this for your records or save it on your computer.

5. Click **Next** to send this information to your clinic.

Important! If you do not click **Next**, the clinic will not be able to see your completed questionnaire. If you prefer, you can save the questionnaire and then return to it later when you are ready to complete it and send it to your doctor's office.

Viewing or Updating Your Information through the Portal

The Portal allows you to view and update general health information documented in your records at the clinic. General health information that you can view and update includes:

- A list of your medications
- Your documented allergies
- A list of your health problems
- Your medical history
- Your immunizations

You can also view and update your insurance information and demographic information, such as your address and phone number.

Be aware that new information submitted through the Portal is routed to a member of clinic staff and not directly into your records. Clinic staff will review the new information and determine whether it is appropriate to add the information to your records. The new information will not be visible in the Portal until the clinic staff updates your records. Display of the patient SSN in the CCR record has been removed.

To view a list of your medications documented by your clinic:

1. Click the **Medications** tab.
2. In the **My Medications** section, click **Current Medications** to view a list of your current medications as documented in your chart at the clinic.



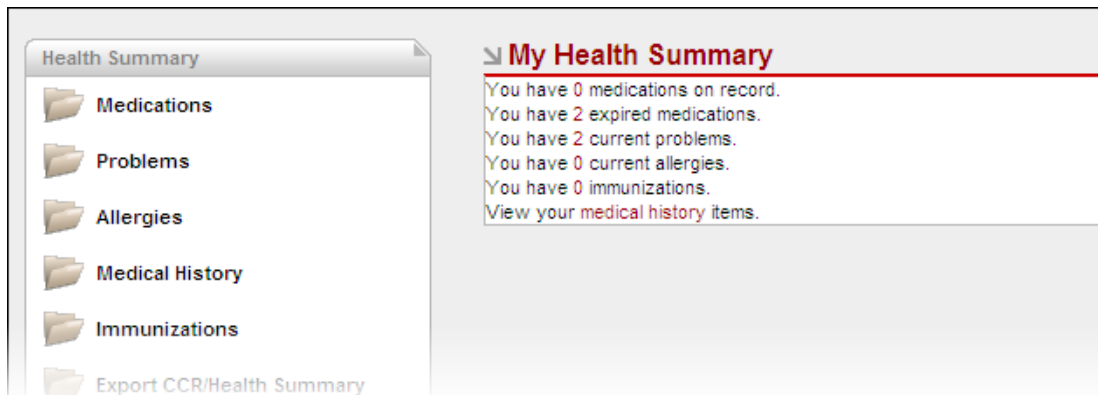
3. To view medications that you have taken previously, but are no longer taking, click **Past Medications**.

To update your medications list:

1. Click the **Medications** tab.
2. In the **Actions** section, click **Add New Medication**.
3. In the **New Medication** form, type the new medication information.
4. Click **Submit**. *New medication information is forwarded to the clinic for review and will not be visible in the Portal until approved and added by the clinic staff.*

To access your Health Summary Information:

1. On the main Portal screen, click the Health Summary tab.
On the Health Summary tab, the **Health Summary** section contains links to your health information.



2. Click on the links in the **Health Summary** section to display details. (Note that clicking on the Medications link will access the Medications tab.)
3. Click the **Problems** link to display a list of current medical problems recorded in your chart.
4. Click the **Allergies** link to display all current allergies recorded in your chart.
5. Click **Medical History** to display a summary of the history contained in your chart.

6. Click **Immunizations** to display immunizations documented by your clinic.

Notice that links to **View Health Summary** or **Export Health Summary** are also included in the **Health Summary** section. See "[Viewing, Printing, or Saving Your Health Summary](#)" for information about these links.

To update your Health Summary information:

1. To update health summary information documented in your chart, click the Health Summary tab located on the main Portal screen.
2. In the **Health Summary** section, click the **Problems** link to review current medical problems recorded in your chart. To add a new problem, click **Add New Problem**, type the new information in the Description field, and then click **Submit** to create and send a message with the new information.
3. Click **Allergies** in the **Health Summary** section to review the current allergies recorded in your chart. Click **Add New Allergy** to create and submit a message regarding new allergies.
4. Click **Medical History** to review the history documented in your chart. To submit more information, click **Add New History**.
5. Click **Immunizations** to review the immunizations recorded in your chart. To submit information about other immunizations, click **Add New Immunization**.

Any new updates to your Health Summary information will be reviewed by the clinic, and then added to your records if appropriate. *The new information will not be visible in the Portal until the clinic staff updates your records.*

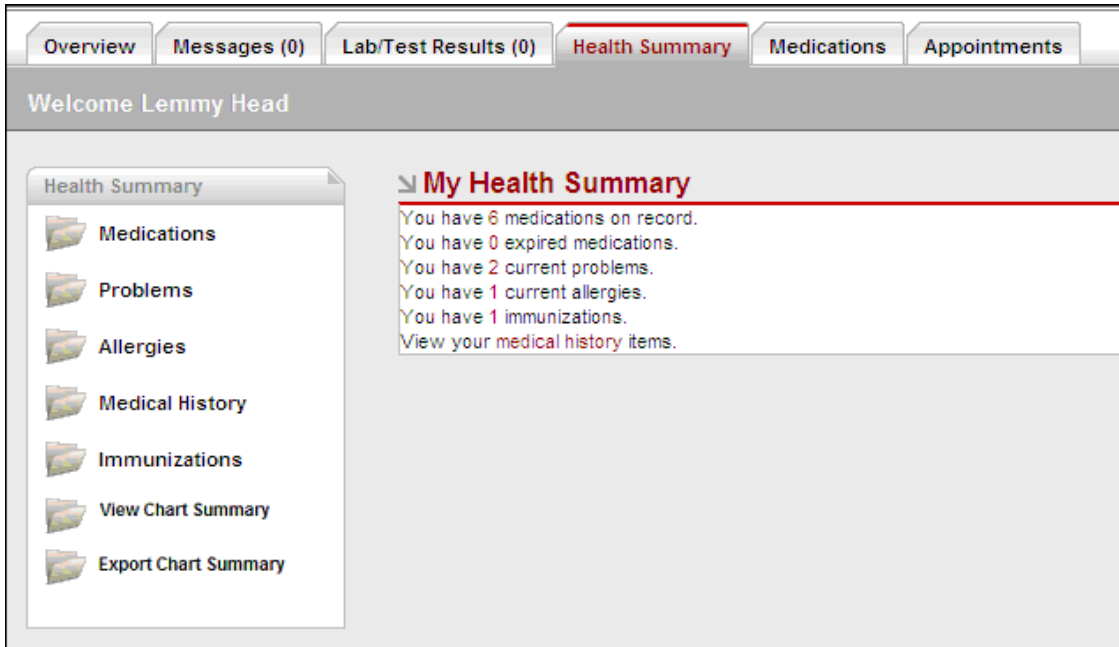
Viewing, Printing, or Saving Your Health Summary

Your Portal allows you to view your Health Summary, which contains a "snapshot" of the health information currently documented in your electronic medical record at your doctor's office. You can print a copy of your Health Summary, or you can save (export) a copy to your computer.

You may want to take a copy of your Health Summary with you if you go to see another doctor. This will enable the new doctor to have detailed information about your health history and to review all medications that you are currently taking before prescribing new medications. This promotes Continuity of Care Records (CCR) handling between providers and is especially useful in avoiding potentially dangerous medication interactions.

To view, print, or save your Health Summary:

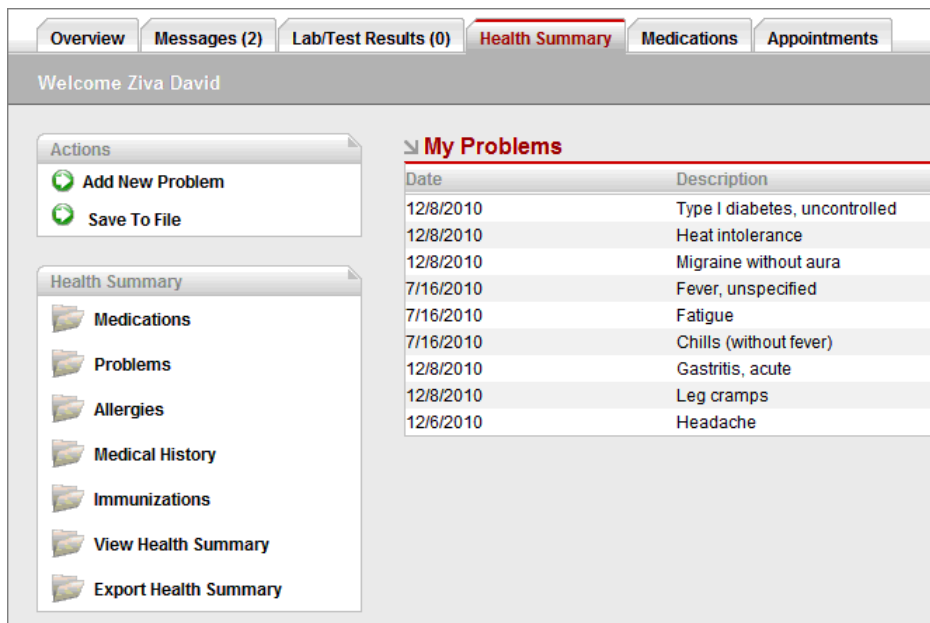
1. On the main Portal screen, click the **Health Summary** tab.



2. To view your Health Summary, in the left panel of the **Health Summary** tab, click **View Chart Summary**. A second-level list appears. Select one of the following options:
 - **View Chart Summary (CCR)** to open the Chart Summary in CCR format, without confidential information.
 - **View Confidential Chart Summary (CCR)** to open the Health Summary in CCR format with confidential information included.

3. To print a section of your Health Summary:

- a. Click a summary section folder in the left panel (**Medications, Problems, Allergies, Medical History, or Immunizations**). The selected section appears.

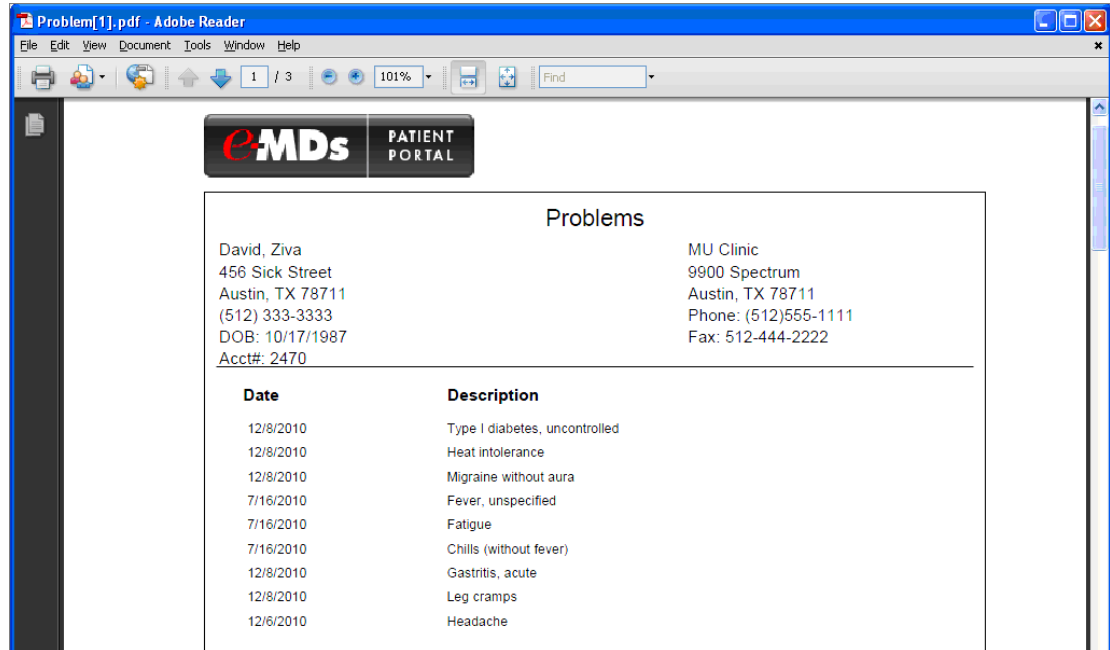


Note: If no entries appear in a summary section, the section cannot be saved and printed.

- b. In the **Actions** section of the left panel, click **Save to File**.
- c. When the File Download window opens, click **Open** to view the resulting .pdf file.

OR

Click **Save** to specify a location for saving the resulting .pdf file on your computer. You can then open the file to view and print the output.



- d. Click the Adobe reader print icon to print the summary on an available printer.
4. *To export an electronic copy of your Health Summary:* in the left panel of the Health Summary tab, click **Export Chart Summary**. A second-level list appears. Select one of the following:
- ♦ **Export Chart Summary (CCR)** to export the Health Summary in CCR format, without confidential information.
 - ♦ **Export Confidential Chart Summary (CCR)** to export the Health Summary in CCR format with confidential information included.

Caution: If you select **Confidential CCR**, the Information exported will include any confidential information recorded in your chart. If you do not want to include the confidential information, select CCR instead.

After saving the Health Summary file to your computer, you can attach that file to an e-mail message if you need to send it to another physician electronically. CCR files are recognized standards that some medical practices may be able to import directly into their electronic medical record if they use an electronic record system.

To view or update your demographics information:

1. Click the **My Account** icon in the upper right corner of the main Portal screen. *The My Account main screen is displayed.*
2. *To view your demographic information,* click **My Demographics**.
3. *To update your demographic information,* click **Edit My Demographics**.

4. Type the new information in the appropriate fields.
5. Click **Submit Changes**. The new information will be routed to your clinic for review, and then added to your records if appropriate. *The new information will not be visible in the Portal until the clinic staff updates your records.*

To view or update your insurance information:

1. Click the **My Account** icon in the upper-right corner of the main Portal screen. The My Account main screen is displayed.
2. Click the **My Demographics** link, and scroll down to **Edit My Insurance**.
3. To update information about your insurance provider, type the information in the fields provided in the **Edit My Insurance** section.
4. If you have changed health insurance providers, scroll down the Edit My Demographics window to the **Add New Insurance** section. Enter the requested information, then click the **Add Insurance** button.
5. To submit demographic changes to the clinic, click **Submit Changes**.

Note: Edited information will not be reflected in your records until approved by the clinic.

To update your Portal account password or e-mail address:

You can view and update your Portal account information (Examples: password, e-mail address) from within the Portal. It is strongly recommended that you change your password immediately after you receive the initial notification that your account has been set up and on a regular basis thereafter.

1. To update your Portal account information, click the **My Account** icon in the upper-right corner of the main Portal screen. The My Account main screen is displayed.
2. To change your password or other information related to accessing your account, click **My Account Maintenance**.

The screenshot displays a web interface for account management. On the left, a vertical menu under the heading 'Account' includes four items: 'My Account', 'My Account Maintenance' (highlighted with a red border), 'My Demographics', and 'Edit My Demographics'. The main area is titled 'Account Maintenance' and contains several input fields, each preceded by an asterisk indicating a required field. The fields are: 'Login Name' with the value 'BAcuna', 'Password' (empty), 'Retype Password' (empty), 'Security Question' with the value 'What is the dog's name?', 'Security Answer' with the value 'George', and 'Email Address' with the value 'bacuna@myisp.com'. A 'Submit Change' button is located at the bottom right of the form area.

3. Type the updated information in the fields provide, and then click **Submit Change**.

Note: The Security Question and Security Answer are used if you forget your password.

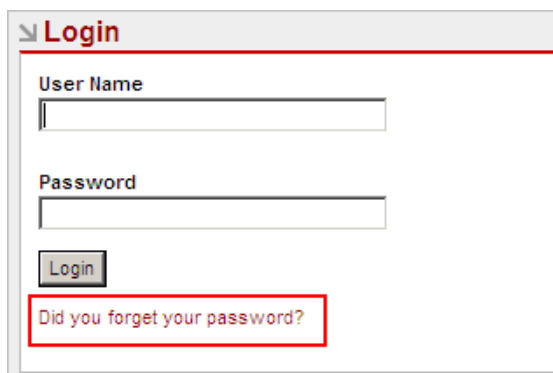
If you forget your password...

You can reset your password from the login area. Notice the text **Did you forget your password** located immediately below the Login button. You can click on this text to access your security question and reset your password.

If you did not set up a security question and answer, then you can contact the clinic to reset your password. No one at the clinic knows your password, but they can reset it if necessary, and then you will be able to create a new password.

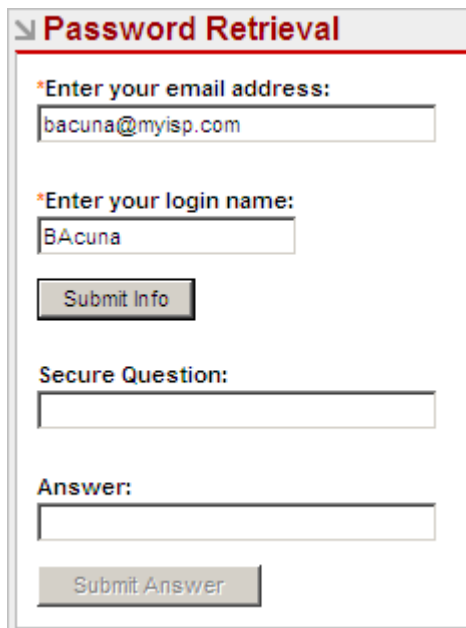
To reset your password:

1. In the Login area, click the text **Did you forget your password?**



The screenshot shows a web form titled "Login". It contains two input fields: "User Name" and "Password". Below these fields is a "Login" button. A red rectangular box highlights the text "Did you forget your password?" located directly below the "Login" button.

The Password Retrieval window displays.



The screenshot shows a web form titled "Password Retrieval". It contains the following fields and buttons:

- *Enter your email address: [bacuna@myisp.com]
- *Enter your login name: [BAcuna]
- Submit Info
- Secure Question: []
- Answer: []
- Submit Answer

2. In the Password Retrieval window, type your e-mail address and login name, and then click **Submit Info**.

The system displays the Secure Question you entered in Account Maintenance.

3. Type the Security Answer you entered in Account Maintenance, and then click **Submit Answer**.

If you do not have a login account for the Portal...

This clinic uses an Internet-based Patient Portal allowing its patients to receive clinic communications as well as request appointments. Access to most Portal functions requires a user name and password issued by the clinic.

If you are a new patient (that is, you have never been seen by this clinic), or the clinic has not assigned you a user name and password, you can still use the Portal to request an appointment. See "[Accessing the Patient Portal](#)" for more information.

When completed, your appointment request is automatically added to the clinic's Scheduling Wait List. After your request is received and processed, someone from the clinic will contact you, ask for additional information (if needed), and confirming an actual appointment time.

You can also access driving directions to this clinic from the login page, if needed.

You must sign a Portal Authorization form before the clinic can assign a user name and password.