

e-MDs Solution Series™

Patient Portal Users Guide

Version 7.2.1

How to Use the Patient Portal



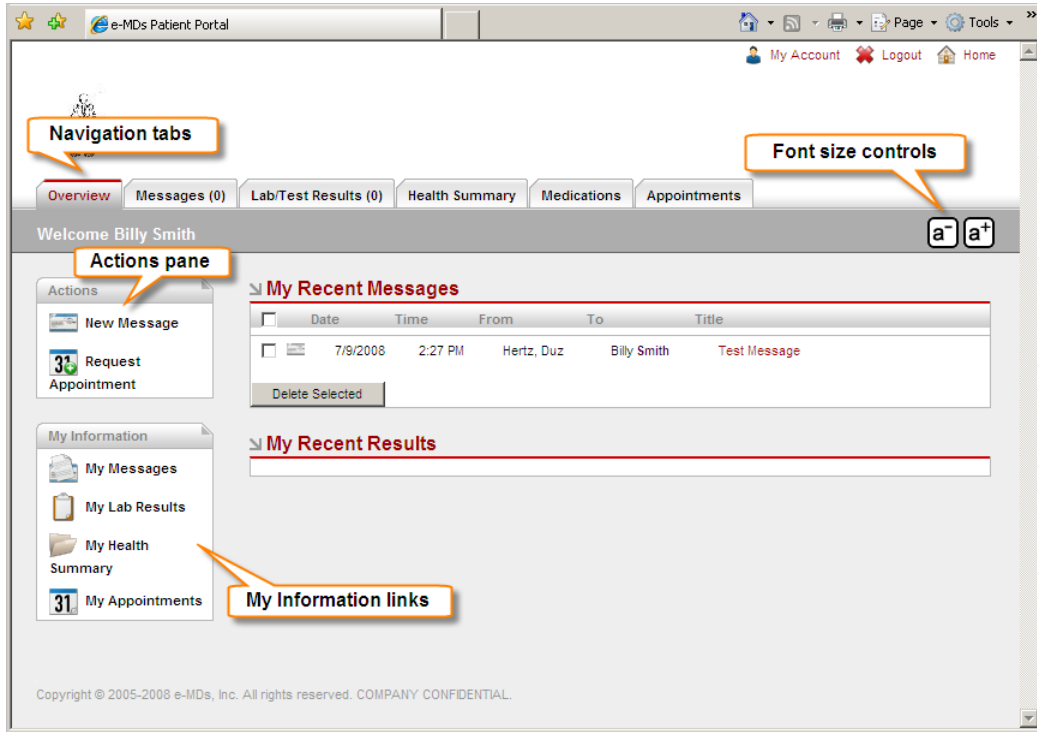
CHARTING THE FUTURE OF HEALTHCARE™

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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.

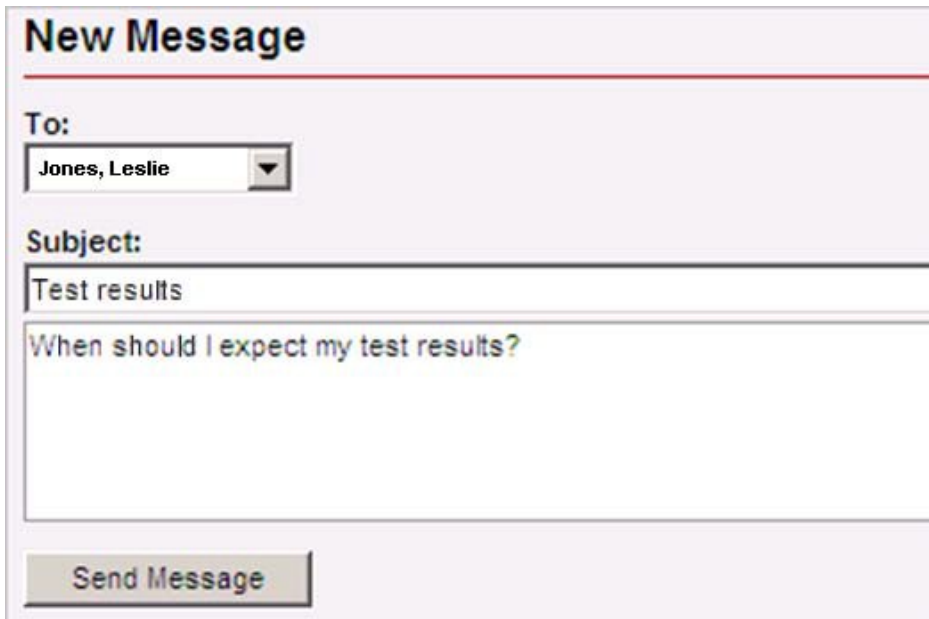
You can view all communications from the clinic through your Portal Inbox on the **Messages** tab. Attachments may be included with communications sent by the clinic.

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 with the following elements:

- Navigation tabs: Overview, Messages (0), Lab/Test Results (0), Health Summary, Medications, Appointments.
- Welcome message: Welcome Pam Inez
- Actions panel: New Message, Request Appointment (3).
- My Information panel: My Messages, My Lab Results, My Health Summary, My Appointments (31).
- My Recent Messages section:

| <input type="checkbox"/> | Date | Time | From | To | Title |
|--------------------------|-----------|---------|-------------|----------|--------------|
| <input type="checkbox"/> | 7/14/2008 | 2:10 PM | Wayne, John | Pam Inez | Lab |
| <input type="checkbox"/> | 7/14/2008 | 2:06 PM | Wayne, John | Pam Inez | Test Message |

Delete Selected
- My Recent Results section:

| <input type="checkbox"/> | Date | Time | From | To | Title |
|--------------------------|-----------|---------|-------------|----------|-------|
| <input type="checkbox"/> | 7/14/2008 | 2:10 PM | Wayne, John | Pam Inez | Lab |

Delete Selected

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

The screenshot shows the Inbox section with the following table:

| <input type="checkbox"/> | Date | Time | From | To | Title |
|--------------------------|-----------|---------|-------------|----------|--------------|
| <input type="checkbox"/> | 7/14/2008 | 2:10 PM | Wayne, John | Pam Inez | Lab |
| <input type="checkbox"/> | 7/14/2008 | 2:06 PM | Wayne, John | Pam Inez | Test Message |

Delete Selected

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 with the following table:

| <input type="checkbox"/> | Date | Time | From | To | Title |
|--------------------------|-----------|---------|-------------|----------|-------|
| <input type="checkbox"/> | 7/14/2008 | 2:10 PM | Wayne, John | Pam Inez | Lab |

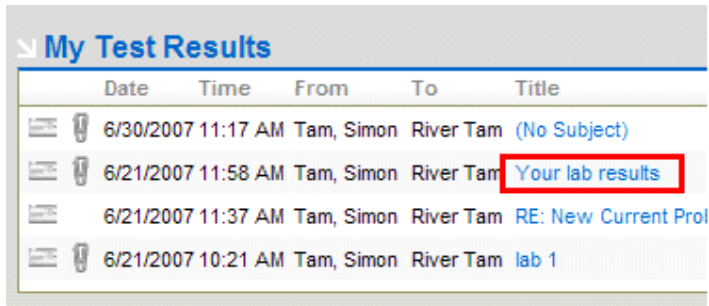
Delete Selected

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:

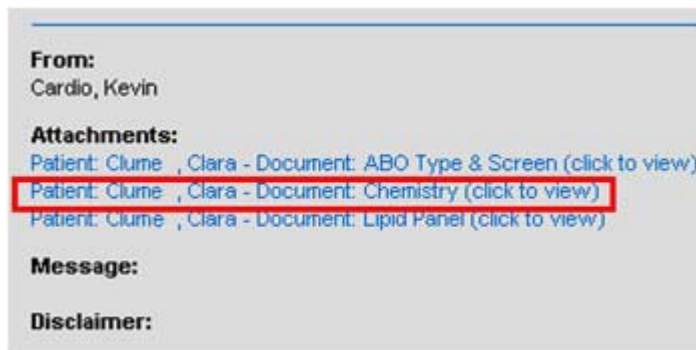
1. Click the title of the message.



| Date | Time | From | To | Title |
|-----------|----------|------------|-----------|----------------------|
| 6/30/2007 | 11:17 AM | Tam, Simon | River Tam | (No Subject) |
| 6/21/2007 | 11:58 AM | Tam, Simon | River Tam | Your lab results |
| 6/21/2007 | 11:37 AM | Tam, Simon | River Tam | RE: New Current Prol |
| 6/21/2007 | 10:21 AM | Tam, Simon | River Tam | lab 1 |

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*.



From:
Cardio, Kevin

Attachments:
[Patient: Clume , Clara - Document: ABO Type & Screen \(click to view\)](#)
[Patient: Clume , Clara - Document: Chemistry \(click to view\)](#)
[Patient: Clume , Clara - Document: Lipid Panel \(click to view\)](#)

Message:

Disclaimer:

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**.

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.

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.

Welcome Leroy Jethro Gibbs

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

My Medications

Current Medications

Past Medications

Actions

Request Refill

Add New Medication

Medications

| Refill | Qty | Drug |
|--------------------------|--------|--|
| <input type="checkbox"/> | 30.00 | Lipitor 10mg Tablet Take 1 tablet(s) by mouth daily |
| <input type="checkbox"/> | 30.00 | Wellbutrin XL 300mg Tablets, Extended Release Take 1 tablet(s) by mouth daily |
| <input type="checkbox"/> | 100.00 | Nephro-Fer 350mg Tablets Take 1 tablet(s) by mouth daily |

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.*

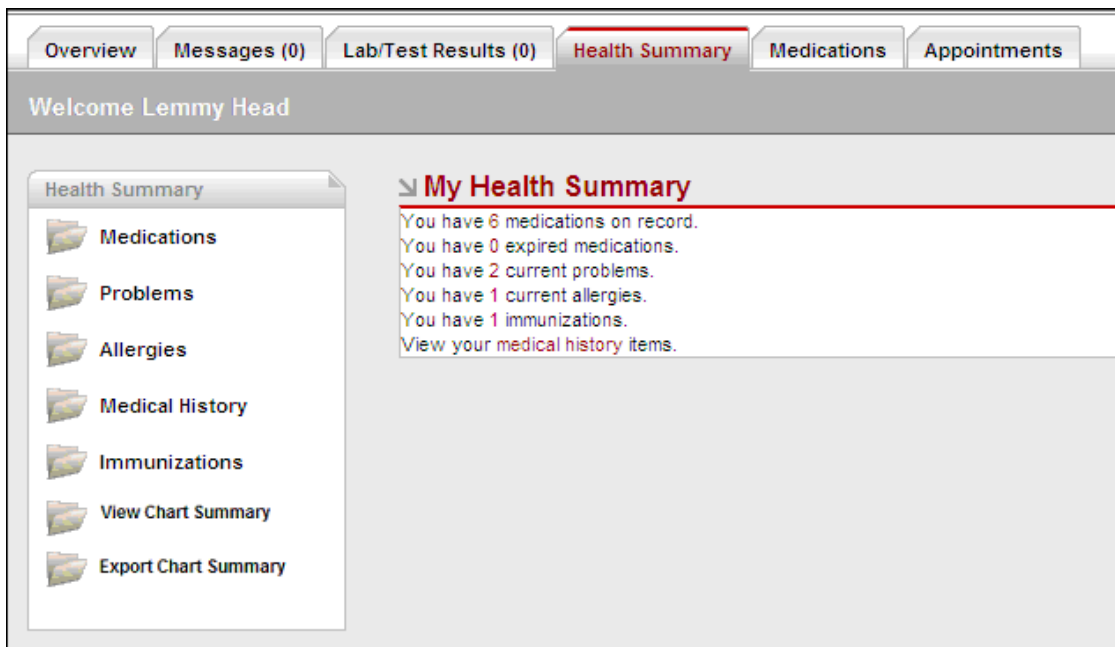
Viewing, Printing, or Saving Your Health Summary

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.

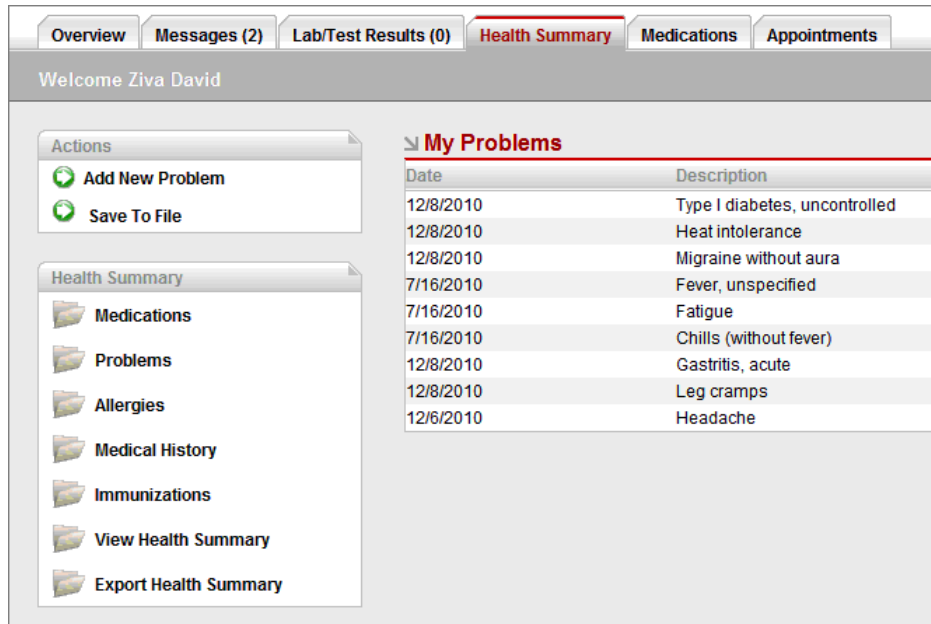
You may want to take a copy of your Health Summary with you if you go to see another doctor. This will enable the new doctor to have detailed information about your health history and to review all medications that you are currently taking before prescribing new medications. This promotes Continuity 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.

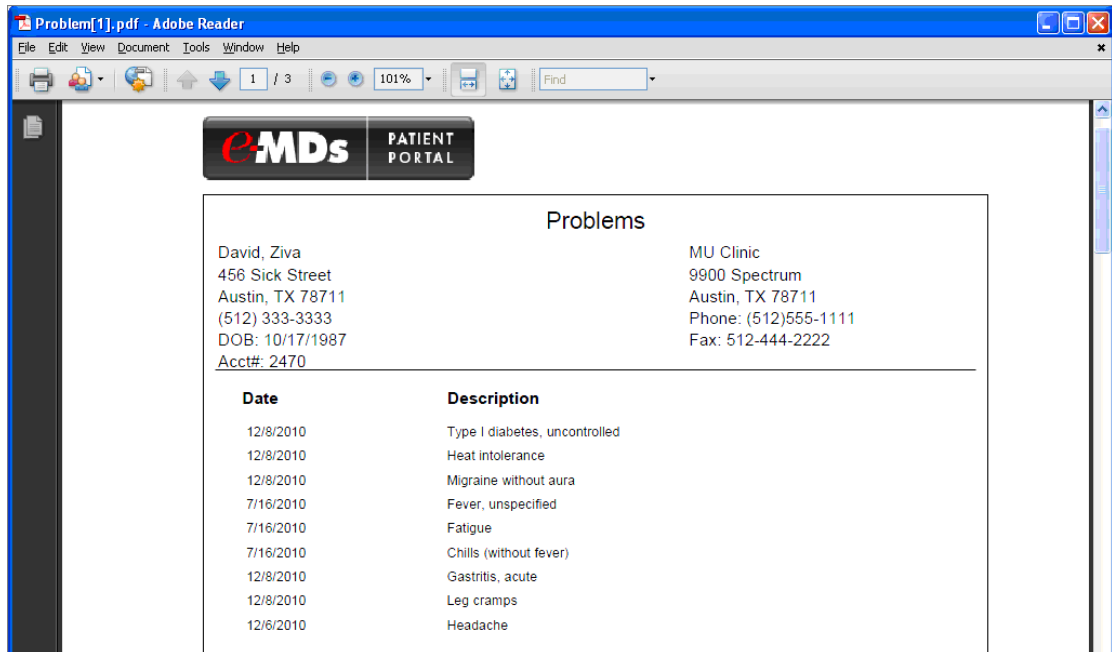


Note: If no entries appear in a summary section, the section cannot be saved and printed.

- 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 shows a web interface for account maintenance. On the left, a sidebar titled 'Account' contains four items: 'My Account', 'My Account Maintenance' (highlighted with a red border), 'My Demographics', and 'Edit My Demographics'. The main content area is titled 'Account Maintenance' and contains several input fields, each with an asterisk indicating it is required. 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.

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.

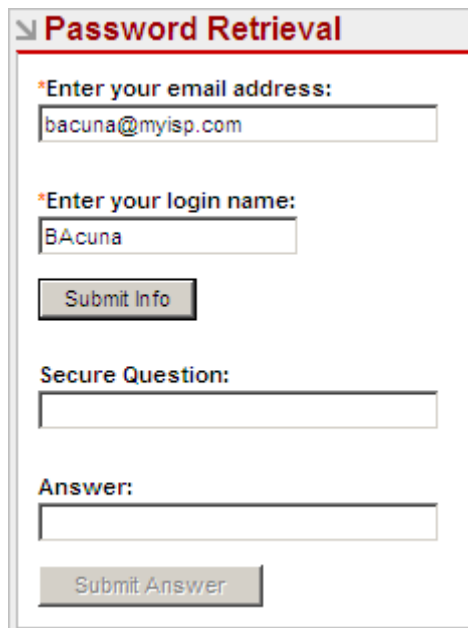
To reset your password:

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 below the "Login" button.

The Password Retrieval window displays.



The screenshot shows a web form titled "Password Retrieval". It contains two input fields: "*Enter your email address:" with the value "bacuna@myisp.com" and "*Enter your login name:" with the value "BAcuna". Below these fields is a "Submit Info" button. Further down, there are two more input fields: "Secure Question:" and "Answer:". Below the "Answer:" field is a "Submit Answer" button.

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.