

Patient Portal Instructions

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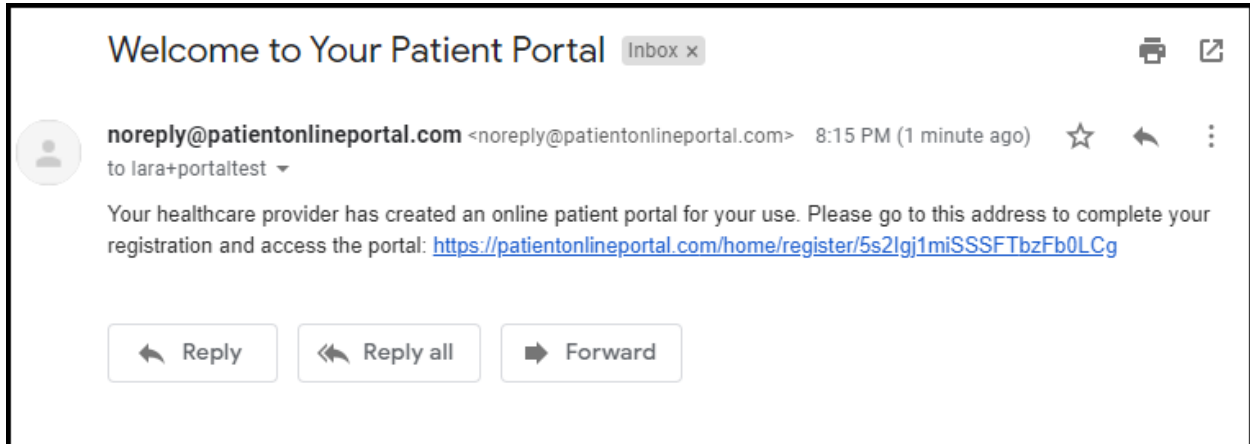
Patient Portal Login

The screenshot shows a login form with a blue header labeled "Login". Below the header, there are two input fields: "User name" and "Password". The "User name" field contains a blurred text, and the "Password" field contains a series of dots. Below the password field, there are two links: "Forgot Password?" on the left and "Portal Admin Login" on the right. There is also a checkbox labeled "Remember me?". At the bottom of the form, there is a blue button labeled "Sign In".

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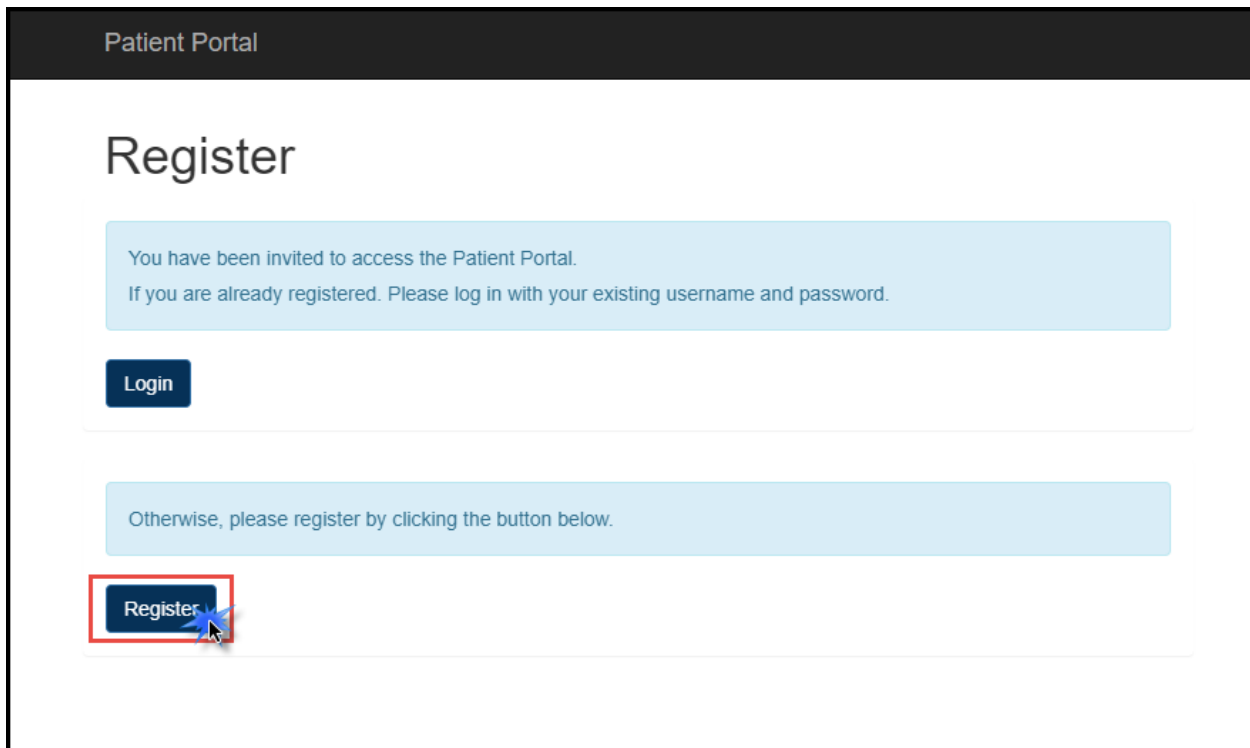
Registration Process

1. You will receive an email from noreply@patientonlineportal.com titled 'Welcome to Your Patient Portal'. It will look something like this:



** If you are struggling to find the portal invitation in your email inbox, please check your spam, promotions folder, or even run a search in your email for noreply@patientonlineportal.com*

2. Click the blue link, and it will bring you to a page that gives you two options: Login, or Register. You will want to select Register.



3. You will need to choose a username and a password; the password must have at least eight characters, and must include 2 of the following:
 - a. Both uppercase and lowercase characters
 - b. One or more numbers
 - c. One or more special characters

Patient Portal

Register

Username:

For your protection we require a secure password. Passwords must be at least 8 characters and must include at least 2 of the following:

- Both uppercase and lowercase characters
- One or more numbers
- One or more special characters

Password:

Confirm Password:

4. Once you have filled in the information, click on 'Register' and you will be brought to a page that tells you Registration is complete.
5. The first time you log in under your newly created Patient Portal Account, you will be prompted to accept the Terms and Conditions; click on the checkbox, then the 'Proceed' button to continue

Messages Profile Forms

Terms and Conditions

Do not use the portal in case of an emergency or for urgent problems. Dial 911 or go to the nearest emergency room.

The Patient Portal is intended as a secure online means for you to access your confidential medical record information. Please note that if you share your Patient Portal user name and password with another person, this will allow that person to see your confidential medical record information. Your provider has no responsibility concerning any breach of your confidential medical record information due to your sharing or losing your user name and password.

Patient Portal is protected using industry standard security measures. While the security measures will reasonably protect your information and your use of Patient Portal, if you have any concerns regarding the security of your information or the use of the Internet to access your medical record information through Patient Portal, you should consider not creating a Patient Portal account.

If you use email services such as Yahoo and Google their email will not be encrypted and may not be secure for sending health information over the Internet.

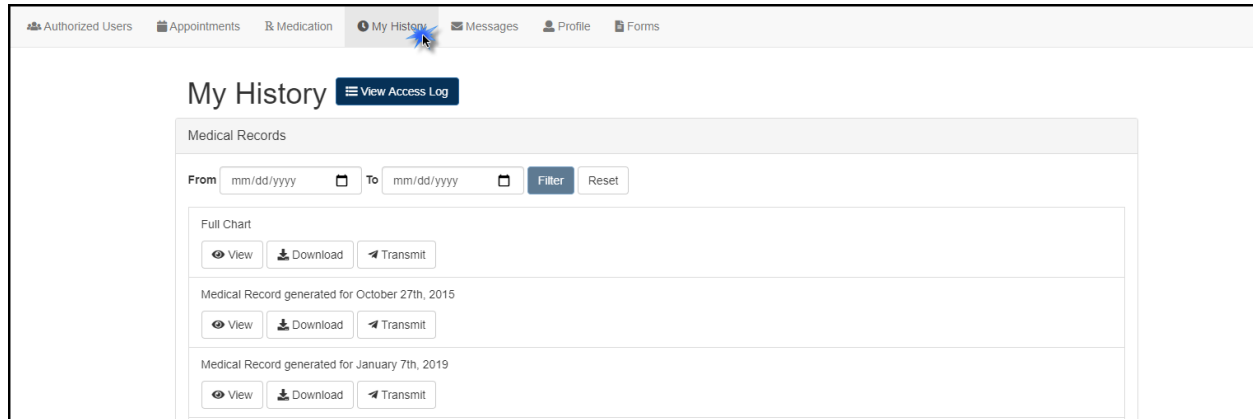
ACCEPT THESE TERMS AND CONDITIONS

[Proceed](#) [Leave](#)

Congratulations! You have completed registration for your online portal!

Medical History

1. To access your Medical History, click on 'My History' at the top of the screen; this will bring you to your Medical Records



2. To view your medical record, click the View button; we've included a sample of what this might look like on the following page.
3. If you want to send your medical record to another provider, click the 'Transmit' button and enter a secure email address where you would like to send this information.

Please note that the email address must be one which uses the 'Direct' protocol for transmission, otherwise your message will not be received by the provider. To tell if your provider is using the Direct protocol, look for the word 'direct' in the email address after the @ symbol.

Summarization of Episode Note

Patient	Jane Doe		
Date of birth	June 18, 1986	Sex	Female
Race		Ethnicity	
Contact info	Primary Home: Rutland, VT 05701, US Tel: 802-773-7821	Patient IDs	1000010662531 97620e6f-534c-4e76-b76f-4308bcf08b7b

Document Id	4-2-035890800044-2969379-14095-263341517606490 97620e6f-534c-4e76-b76f-4308bcf08b7b
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MEDICATIONS

Medication	RxNorm Code	Start Date	End Date	Status
Lexapro	352273			Completed

PROBLEMS

Problem Name	Snomed Code	Start Date	End Date	Status
(F43.10) Post-traumatic stress disorder, unspecified				Active

ENCOUNTERS

Date	Diagnosis
1/13/2016	o (F43.10) Post-traumatic stress disorder, unspecified(SNOMED:)

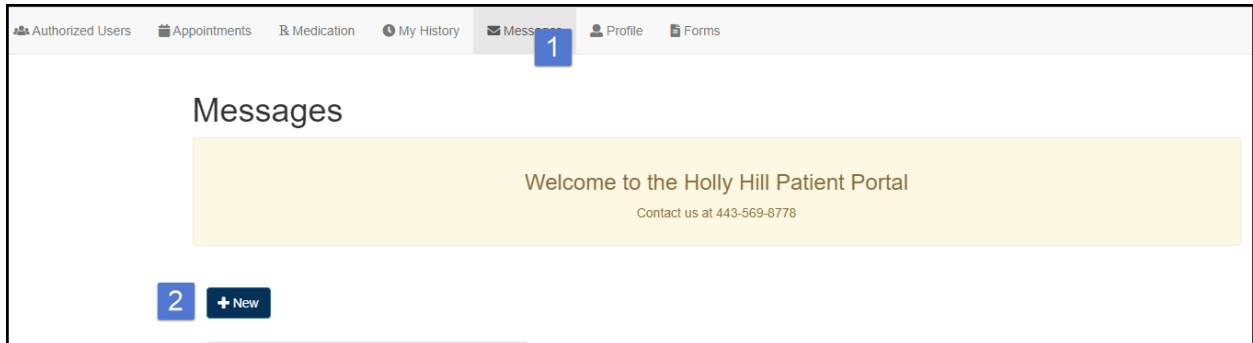
PROCEDURES

FUNCTIONAL STATUS

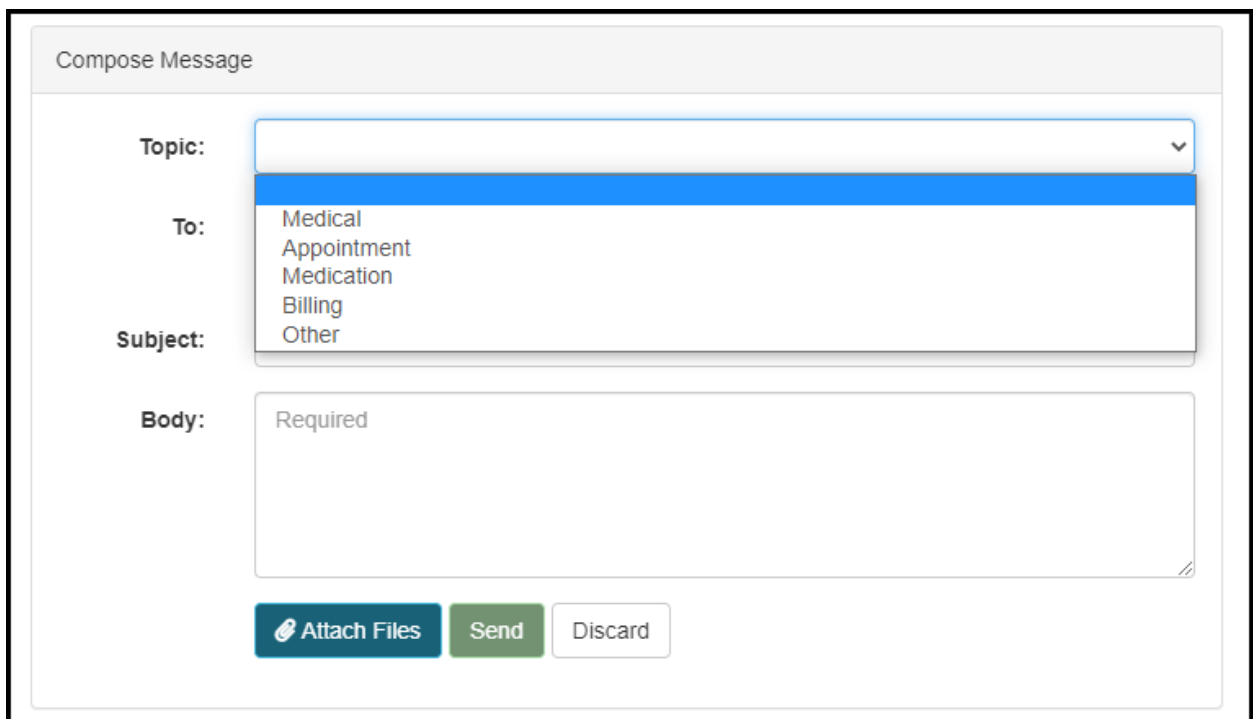
Functional Status
Exam: Examination of Ms. Doe reveals her to have no apparent serious mental status abnormalities. She is normal in appearance with age appropriate dress and grooming and she appears to be her stated age. Neither depression nor mood elevation is evident. Her speech is normal in rate, volume, and articulation and her language skills are intact. She convincingly denies suicidal and self injurious ideas or intentions. Homicidal or assaultive ideas or intentions are also denied. Hallucinations and delusions are denied and her behavior is generally appropriate. Associations are intact, thinking is basically logical and thought content is appropriate. There are no signs of cognitive difficulty, based on vocabulary and fund of knowledge. Memory is intact for recent and remote events and the patient is oriented to time, place, and person. There are no apparent signs of anxiety. A normal attention span is in evidence and she exhibits no signs of hyperactivity. Insight and judgment appear intact.

Messaging

1. To send a secure message to your provider, click on 'Messages' in the top bar of the screen. Then click on the 'New' button.



2. Once you've selected 'New', choose the drop-down menu to select the topic for your message.



3. Compose your message, select your provider's name using the dropdown arrow at the right of the To field, then click 'Send'.

Compose Message

Topic: Billing

To: Courtney

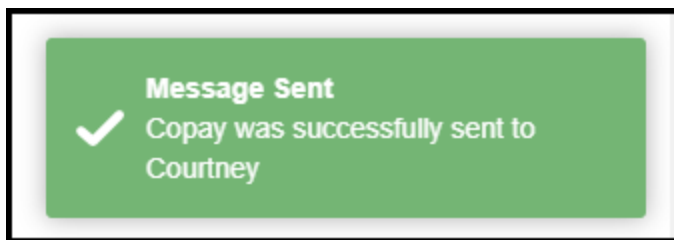
Add

Subject: Copay

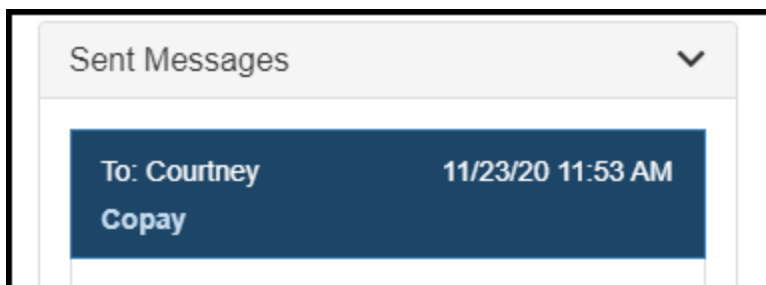
Body: Did I pay my copay for my last appointment? Could I get an invoice, please?

Attach Files Send Discard

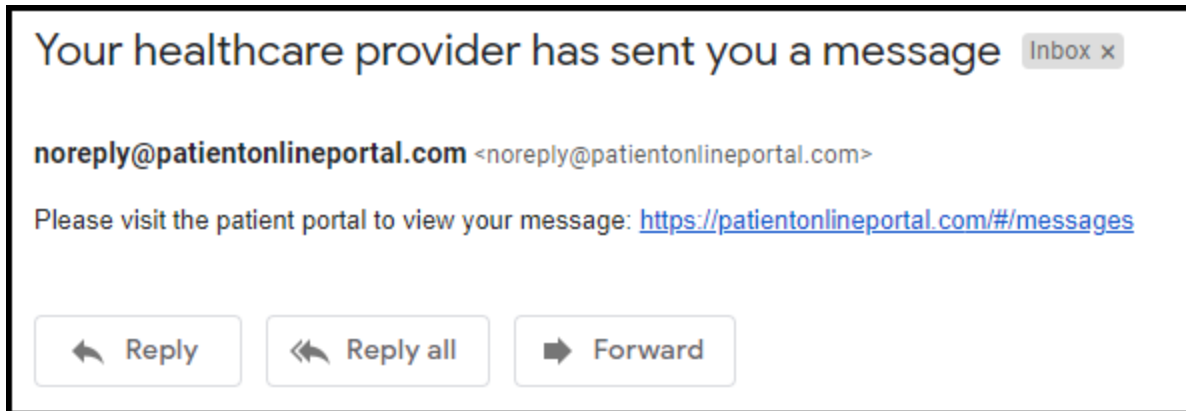
4. After clicking 'Send', you should see a notification in the bottom right-hand corner of your screen notifying you that the message was sent successfully.



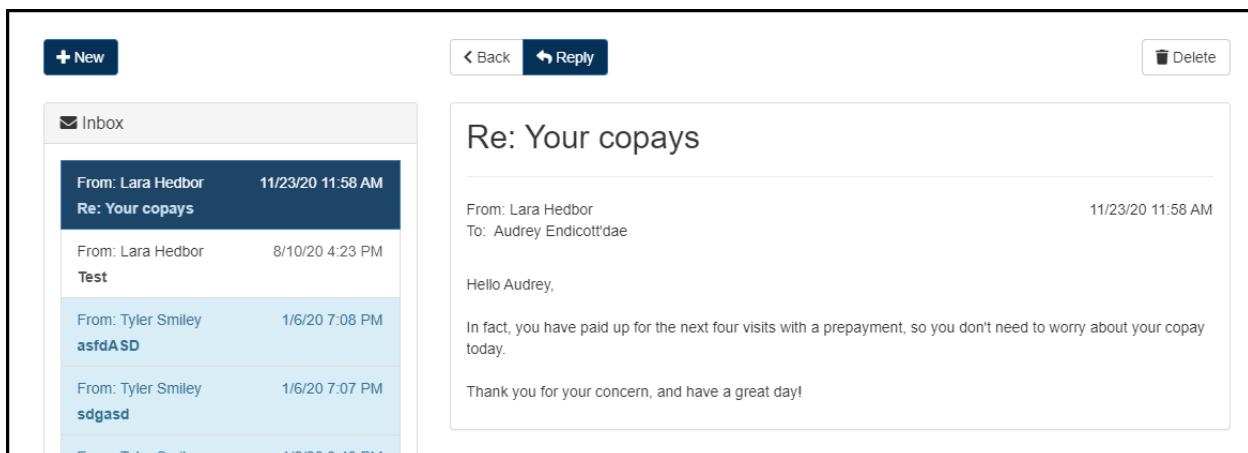
5. Your sent message will show under 'Sent Messages' if you wish to review it



- When your provider replies, you will receive an email alert to check the portal for the secure message:

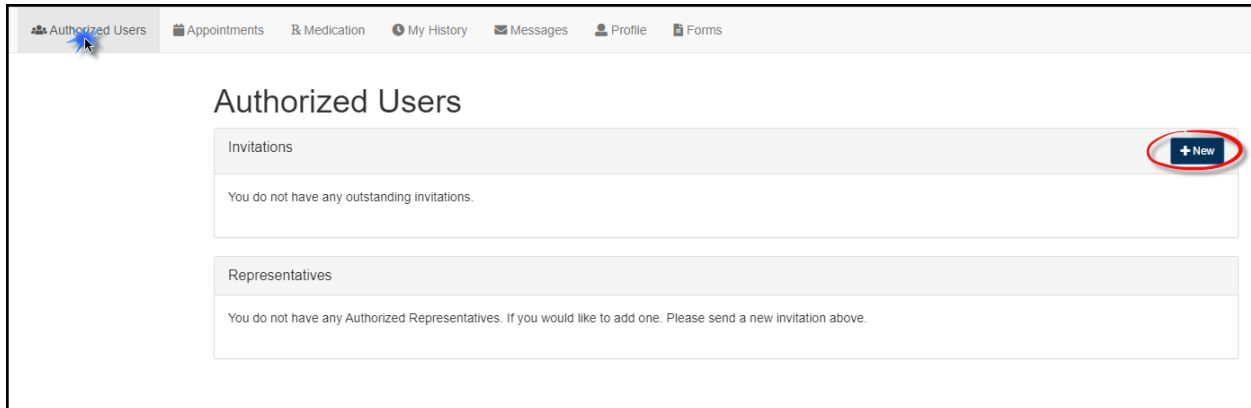


- Click the link provided and you will see the response in your inbox. Click on the response to read.



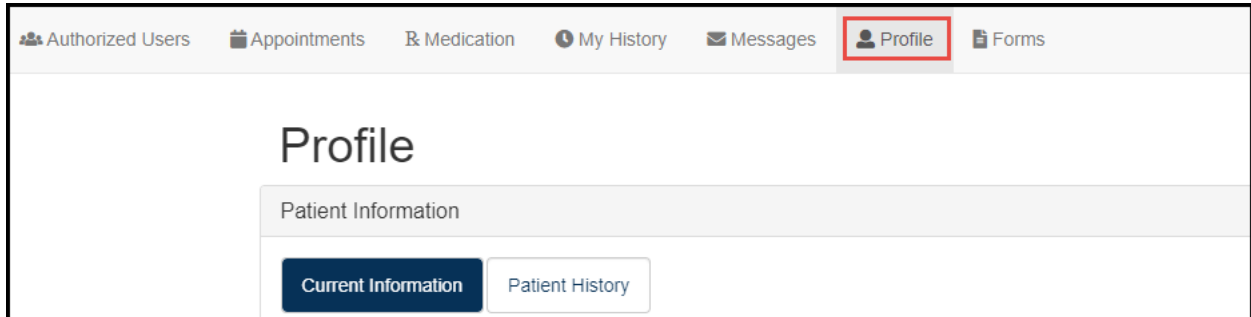
Authorized Users

1. If you would like to authorize someone else to access your account (such as a parent or a legal guardian,) click on Authorized Users at the top, then click 'New' to send them an invitation to register.



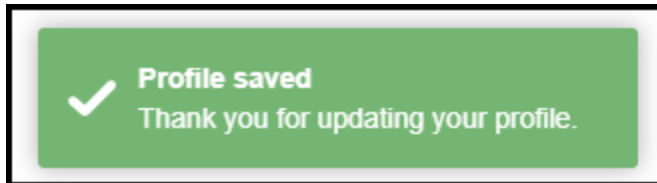
Profile

You have the ability to enter and make changes to demographic data on file at your provider's office. Click the 'Profile' option on the top menu, the second-most option to the right hand side.



The Current Information tab shows you a list of fields that you can update with your demographic information. *Please note that you are not able to change your name.*

After entering or changing your current information, click 'Save'. You will receive a message in the bottom right-hand corner that indicates that your profile was saved. If you do not hit 'Save', any updates you've made will not be saved.



Patient History

Patient History will bring you to an area you can fill out for your provider to provide a history of your current illness, past psychiatric and medical history, social and developmental history, and family history.

The screenshot shows a web interface for a patient's profile. At the top, there are navigation tabs: Authorized Users, Appointments, Medication, My History, Messages, Profile (highlighted with a blue box and the number '1'), and Forms. Below this is the 'Profile' section, which has a sub-section 'Patient Information'. Within 'Patient Information', there are two tabs: 'Current Information' and 'Patient History' (highlighted with a blue box and the number '2'). Under 'Patient History', there are several sub-tabs: 'History of Present Illness' (highlighted with a blue box and the number '1'), 'Past Psychiatric History', 'Medical History', 'Social History', 'Developmental History', and 'Family History'. The form includes a text input field for 'Name of person completing form if other than patient:', a 'Relationship' section with radio buttons for 'Mother', 'Father', and 'Significant Other', a text input field for 'What is the primary reason for your visit?', and two sections for 'Please list any symptoms you are currently experiencing', each with an '+ Add symptom' button. At the bottom, there are buttons for 'Save for later' and 'Continue'.

1. Start on the History of Present Illness tab by filling in all applicable areas
2. Once you reach the bottom of the History of Present Illness tab, select 'Save for Later' to save progress or click 'Continue' to go to the next tab. The 'Back' button will bring you back to the previous tab.

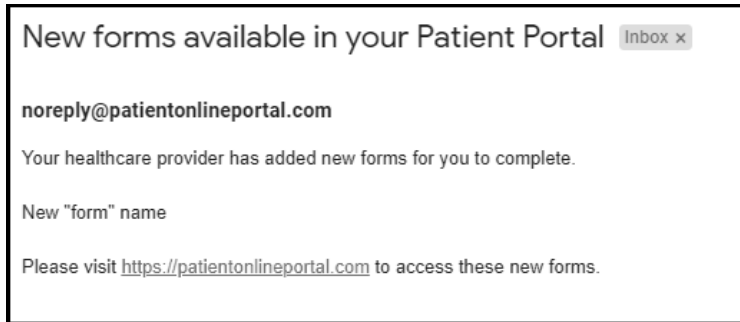
This screenshot shows a horizontal row of three buttons. On the left is a blue button with a floppy disk icon and the text 'Save for later'. In the middle is a white button with a left-pointing arrow and the text 'Back'. On the right is a blue button with a right-pointing arrow and the text 'Continue'.

3. After you have completed all tabs, the 'Family History' tab will have a 'Submit' button; when you have submitted your changes, the following message will show

The screenshot shows the 'Profile' page with the 'Patient History' tab selected. Below the tabs, there is a confirmation message: 'You submitted your patient history to your provider on Tuesday, November 24, 2020. You can no longer edit your patient history, but you can + Create a New Patient History'. The '+ Create a New Patient History' button is highlighted with a blue box.

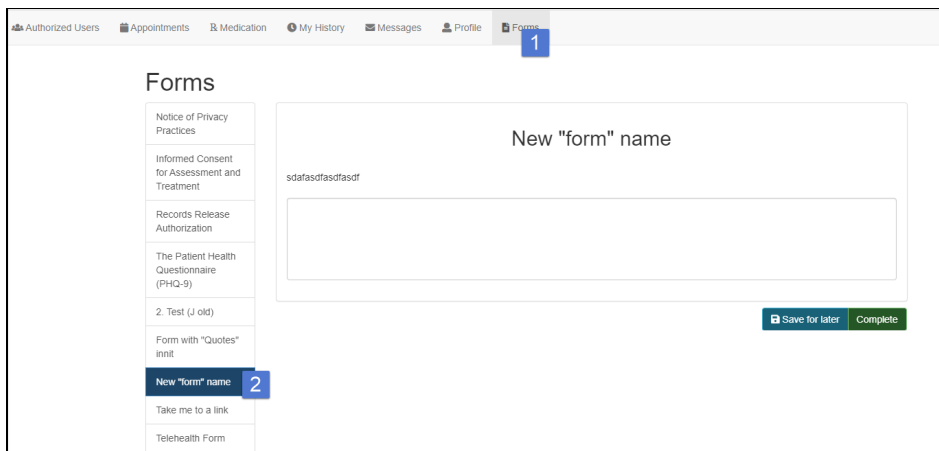
Forms

1. You may receive an email from your provider asking you to fill out a form. The form will be listed in the email; in our example, the form is called 'New "form" name'



2. Sign into your patient portal and go to 'Forms' at the far-right of the top bar.

3. Find the form on the left side and select it.



4. Fill out the form as instructed

5. If a signature is required, click in the field (as shown below)



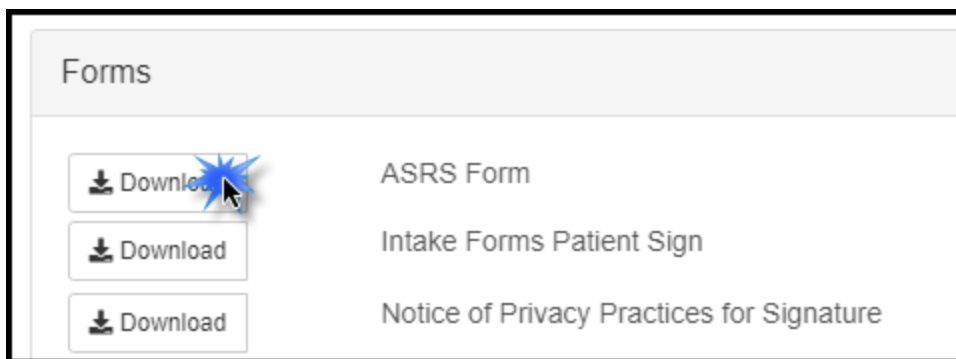
6. 'Cancel' will close the window, 'Clear Signature' will clear out the signature so you can try again, and 'Authorize Signature' will confirm the signature and add it to the form.
7. Once the form has been completed, click the 'Complete' button on the bottom. If you start the form but need to finish it at a different time, click the 'Save for Later' button. You will be able to return at any time to finish.

You may be asked to download a form from the website.

1. From the forms page go to the 'Uploads/Downloads' at the bottom of the left-hand column



2. You may download by selecting the 'Download' button beside the form your provider would like you to fill out.



3. From there, fill out your form on your computer, then drag and drop the file onto where it says 'Drag your Intake Forms into this box or tap here to upload'
4. Alternatively, if you click the 'Tap here to upload', you can choose where to find your form from your local computer!
5. Once the file is uploaded, this message will appear on the bottom right notifying you that the upload is complete.

