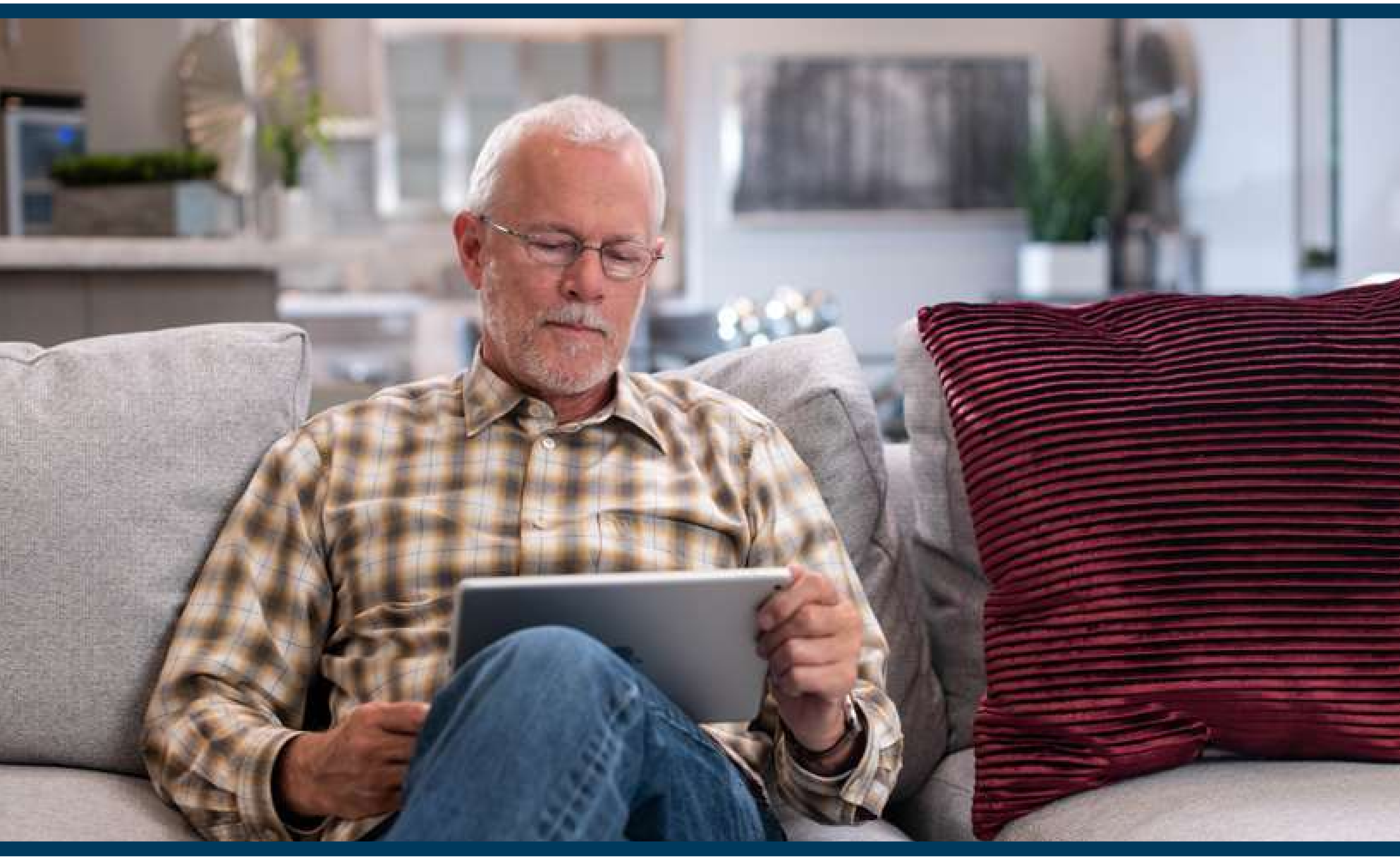
AdvancedMD

Patient Portal

Your healthcare right at your fingertips.



- Schedule appointments
- View medical information
- Request prescription renewals
- Message your doctor
- Pay your bill
- Submit forms

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Accessing Patient Portal

When the patient first enters the patient portal, they must register & activate their account.

Patients can register for the portal one of three ways

- Self-registration
- Register with a Patient Portal Invite
- Social Media Login

1.1 SELF-REGISTRATION

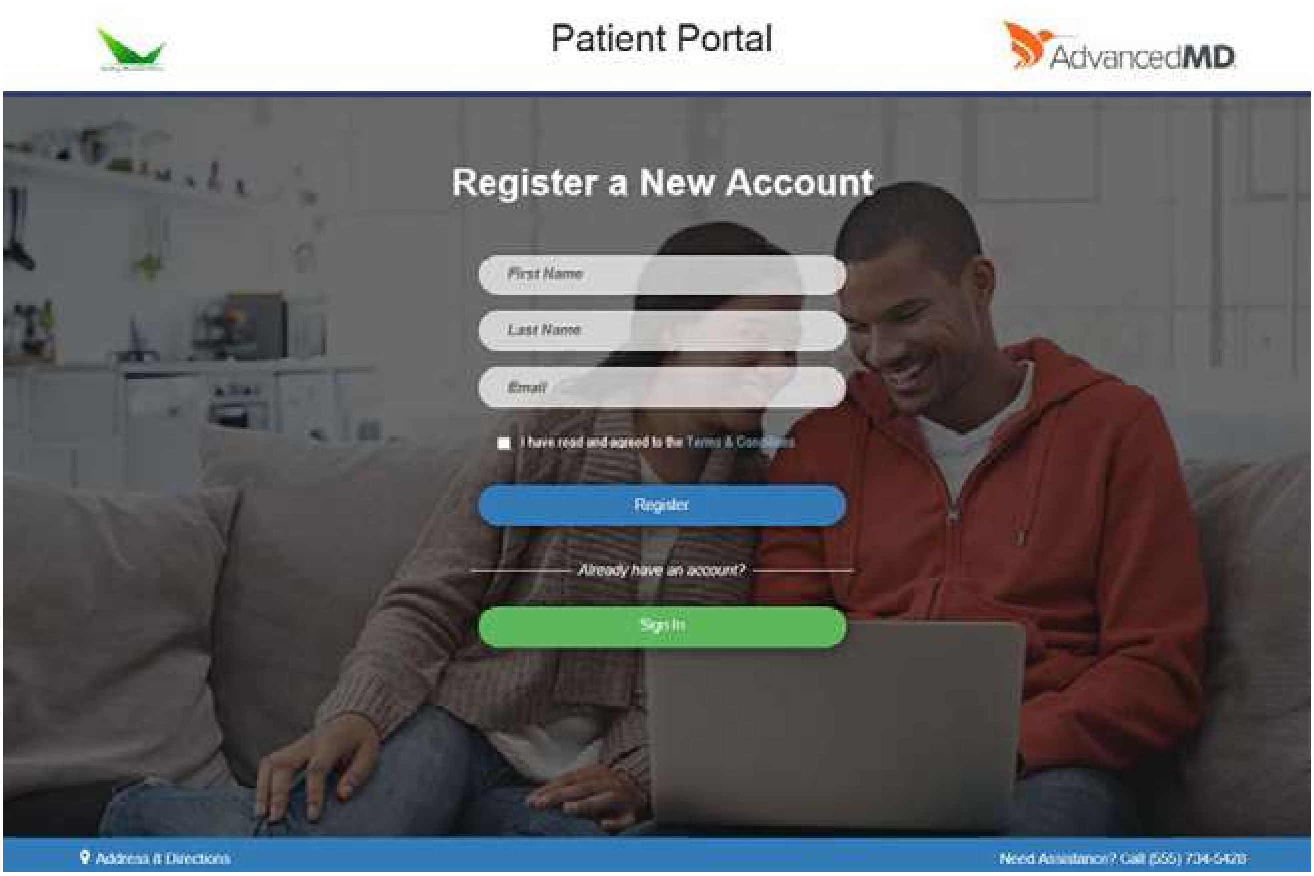
Patients do not need an email invite to create a patient portal account.

Patients can complete the following steps for self-registration:

1. Direct patients to your practice's Patient Portal login page where they can click Register to begin their self-registration for the portal.

2. After filling out the required information on the screen and clicking Register, the patient will receive a Patient Portal Account Notification email with a link to the Complete Account

REGISTRATION SCREEN
Patients should follow the instructions below in the Register with a Patient Portal Invite section to complete their Patient Portal account registration.

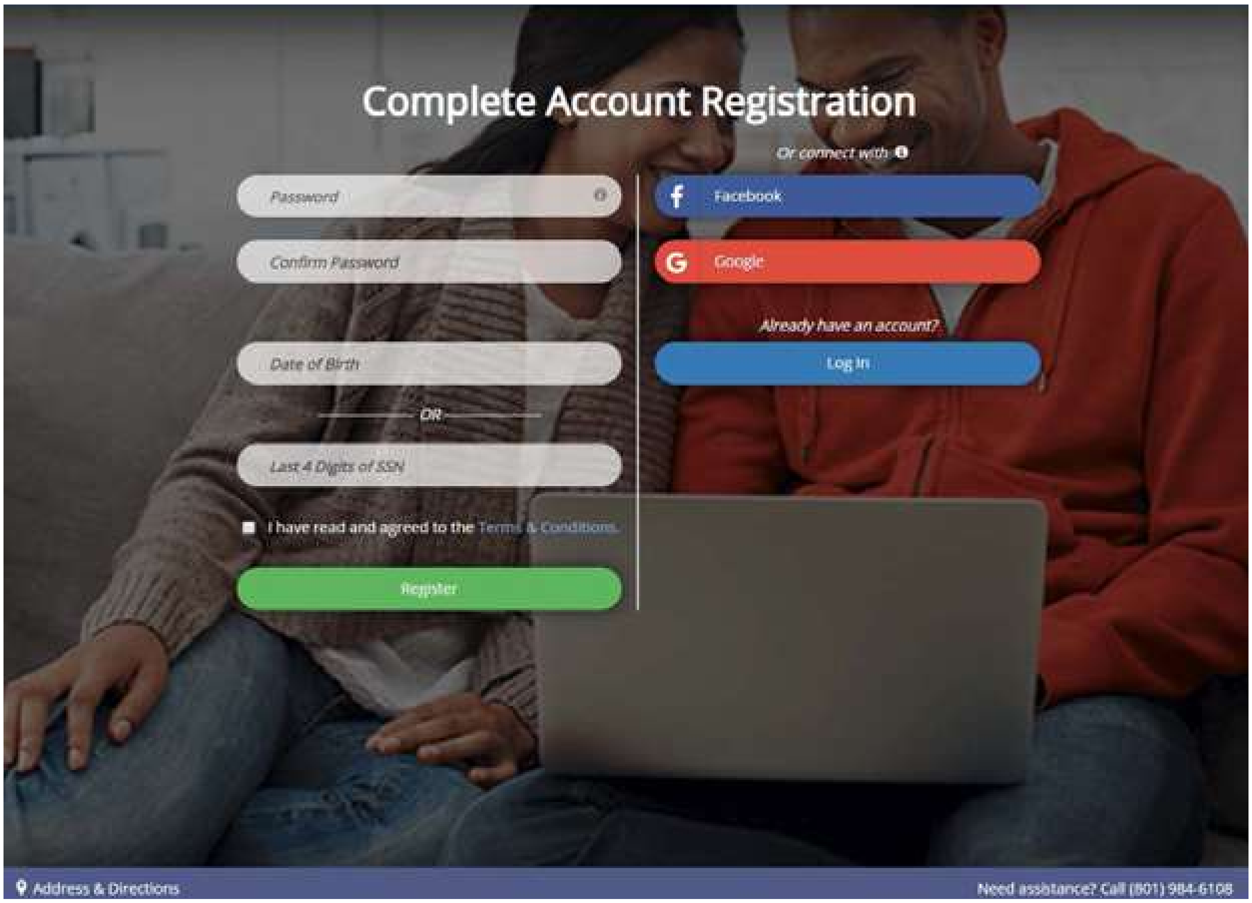


IMPORTANT NOTES:
To register, the patient name and email entered on the Register a New Account screen must match the name and email on the Patient Information screen.

The initial email address entered on the Patient Information screen will also display in the Account Email field on the Patient Portal dialog.

1.2 REGISTER WITH A PORTAL INVITE

When you click Invite in the Patient Portal dialog, an email is sent to the email address in the “account email” field. The email contains a link that takes the patient directly to the Complete Account Registration screen.



The following information must be entered to register and activate a portal account.

New Password

Passwords must contain a minimum of eight characters and include one upper case letter, one lowercase letter, one number, and one special character.

At least one of the following identifiers

- Birth Date – MM/DD/YYYY
- SSN – last four digits

Read and agree to the Terms & Conditions

Click Register

Once the account is registered and activated, account holders are automatically logged in to the Patient Portal.

IMPORTANT NOTES:
If a patient’s social security number is not required in **Utilities > System Defaults > Demographics > Patient**, *the social security option on the registration screen will not display.*

1.3 REGISTRATION USING A SOCIAL MEDIA ACCOUNT

Patients can conveniently access their patient portal using their Facebook or Google account login.

The following instructions explain how the patient can register, link and unlink their patient portal account with their social media account.

1. **Register screen**
   Click the Facebook or Google button to link your patient portal account to your social media account. If you are not currently logged in to your social media account, enter your credentials.

   After the accounts have linked, the Password and Confirm Password fields are no longer required and will not display on the Register screen.

2. **Enter at least one of the following identifiers**
   Birth Date – MM/DD/YYYY

   SSN – last four digits

3. **Read and agree to the Terms & Conditions**

4. **Click Register**

Once the account is registered and activated, you are automatically logged in to the Patient Portal. You will be able to access your account using your social media login information.

Link Your Social Media Account

Go to the Patient Portal home page.

1. Select **Profile** > **Update Profile Settings**.
2. Click the Link Facebook Account or Link Google Account button to link your patient portal account to your social media account. If you are not currently logged in to your social media account, enter your credentials.

Now you will always be able to log in to your patient portal account using your social media login information.

Unlink Your Social Media Account

Go to the Patient Portal home page.

1. Select **Profile** > **Update Profile Settings**.
2. Click the Unlink Facebook from this account or Unlink Google from this account button to unlink your patient portal account from your social media account. You will be redirected to the Patient Portal home page.

IMPORTANT NOTES:
Privacy is important to us, and we will only use social media account information to validate the patient's identity. We will never access their profile or post to their social media account.

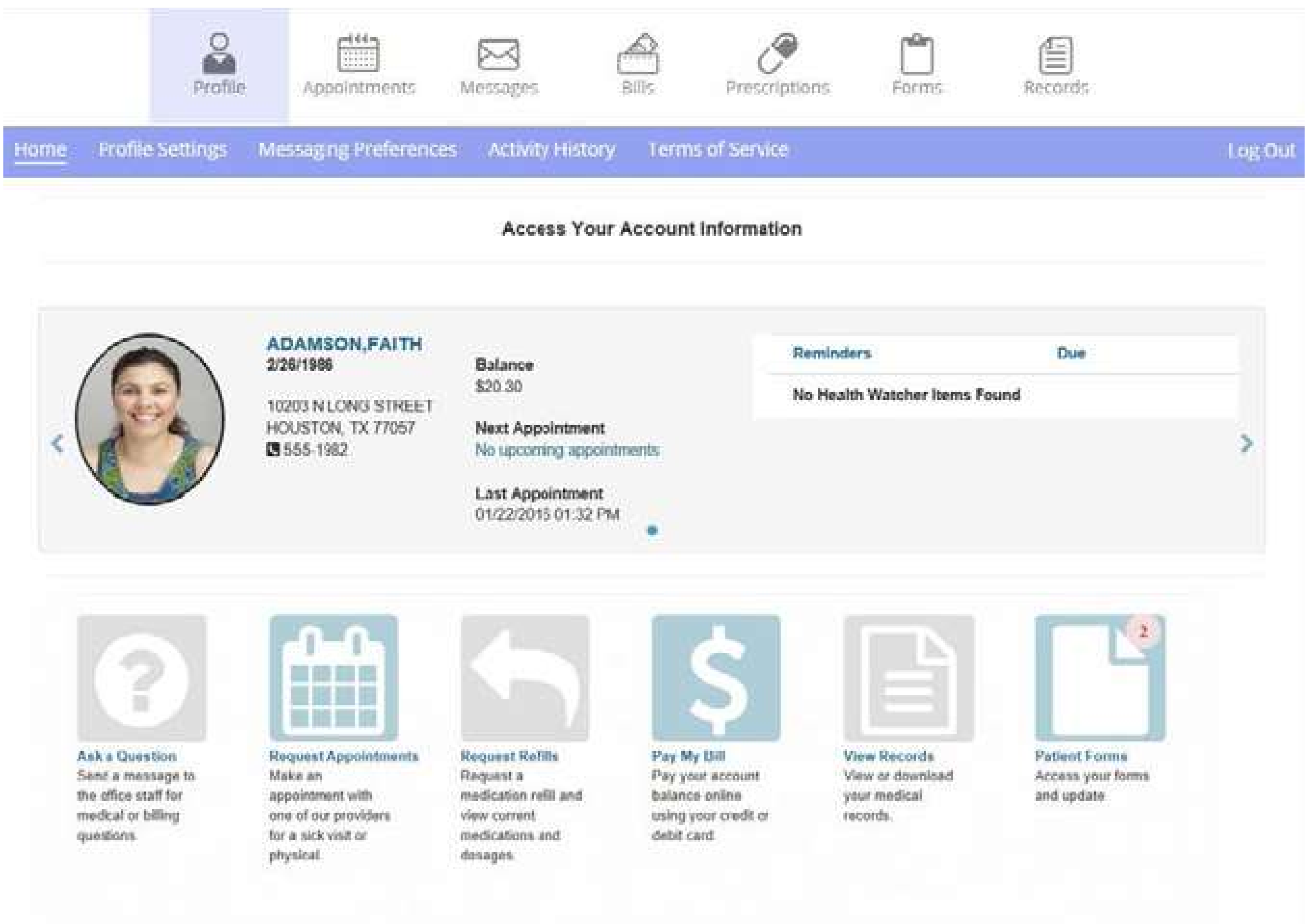
1.4 FORGOT PASSWORD

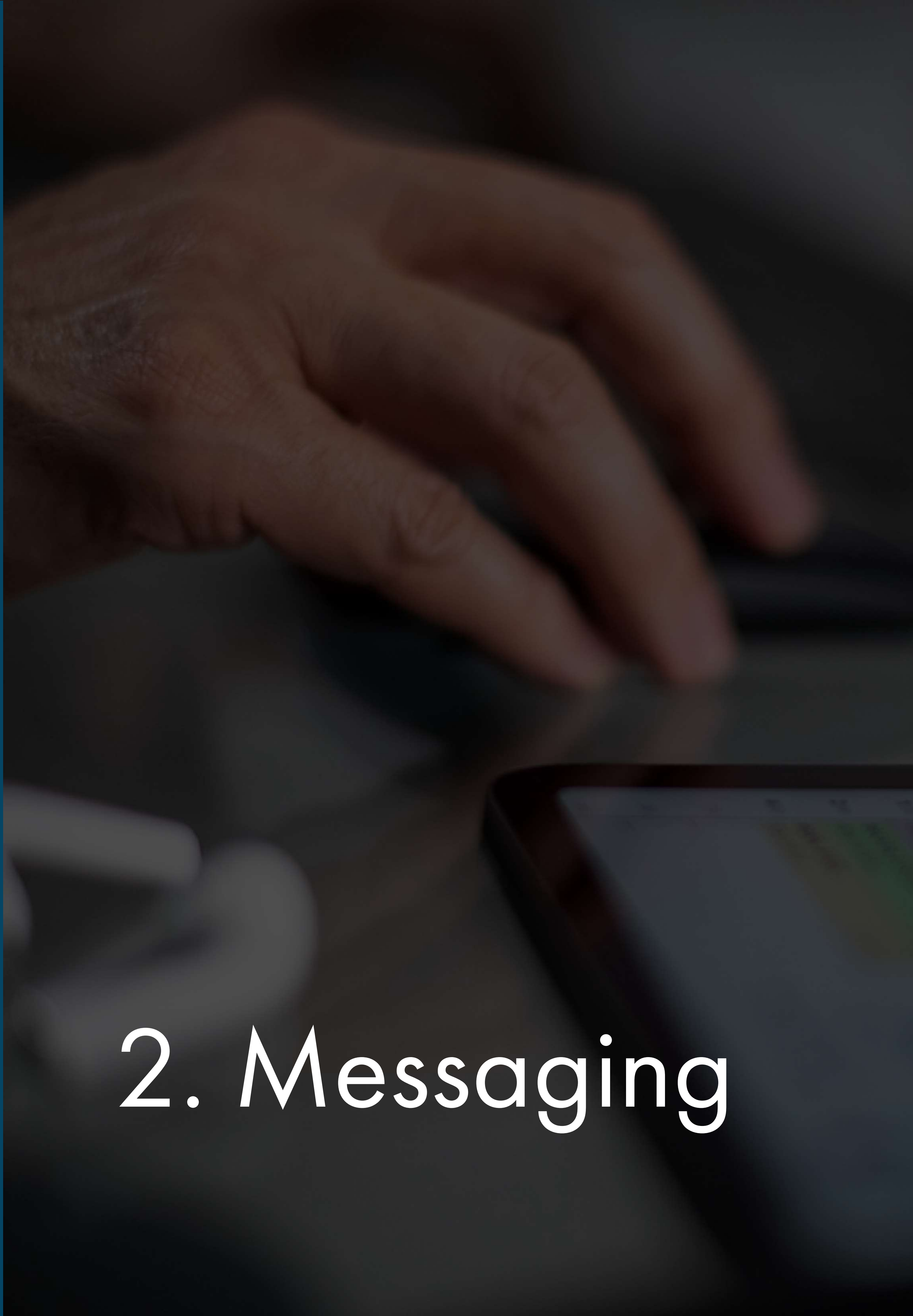
The following instructions explain the steps the account holder will take to reset their patient portal account password.

Go to the Patient Portal log on screen.

1. Click Forgot Password.
2. Enter your email address.
3. Click Send New Password.
4. Click the link included in the Patient Portal Account Notification email.

Patient Account Home Screen





2. Messaging

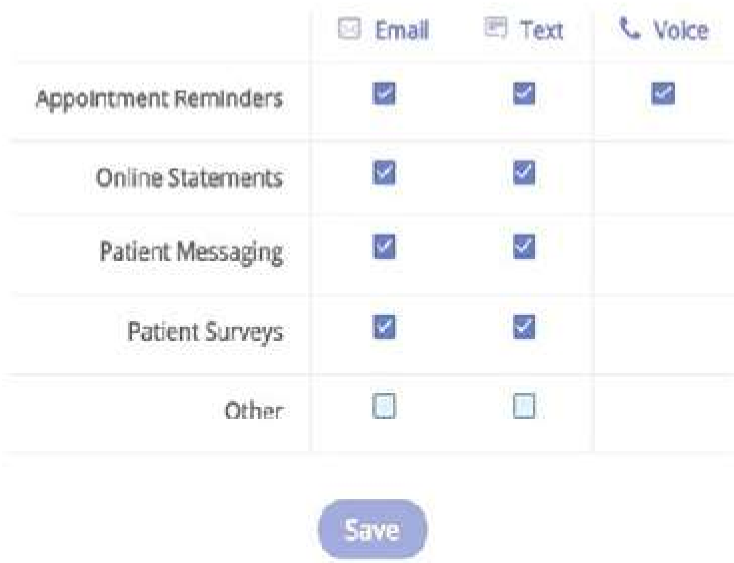
2.1 UPDATE MESSAGING PREFERENCES

Patient Portal account holders can update Messaging Preferences in the Patient Portal for the responsible party and patients.

Go to **Profile > Messaging Preferences**.

If the responsible party account holder has no patients tied to their account, they can change the messaging preferences for themselves for all notification types.

If the responsible party account holder has patients tied to their account, they can make changes for all patients and themselves. In addition to changing preferences for patients, they can choose to have Appointment Reminder notifications sent to the responsible party or the patient.



NOTES:
Online Statements are only sent to the Responsible Party social media account.

2.2 ASK A QUESTION

Patients or accounts holders can click the Ask a Question icon to send an email message to your practice or a specific provider.

To answer the question go to **Tasks > Messages** in PM.

To enable patients to send a message directly to a provider:

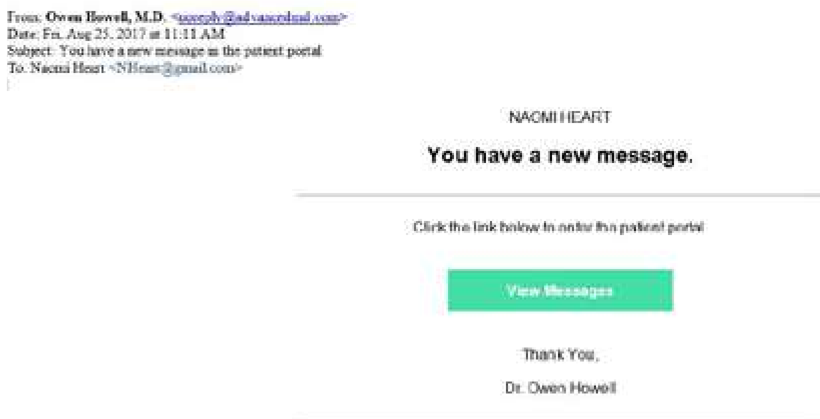
Go to **Utilities > User** Setup in PM.

- Select the provider's Login.
- Select the provider's name from the Provider drop-down.

NOTES:
The login and provider are the same. This will enable patients to select providers and send them direct messages from the Patient Portal.

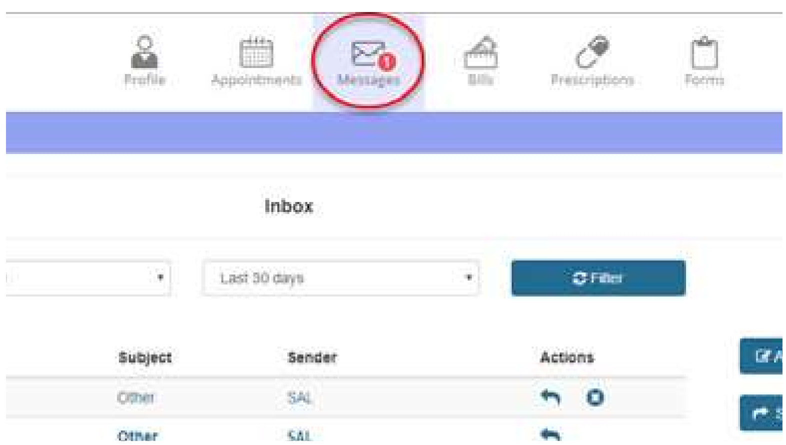
2.3 RECEIVE MESSAGES IN THE PORTAL

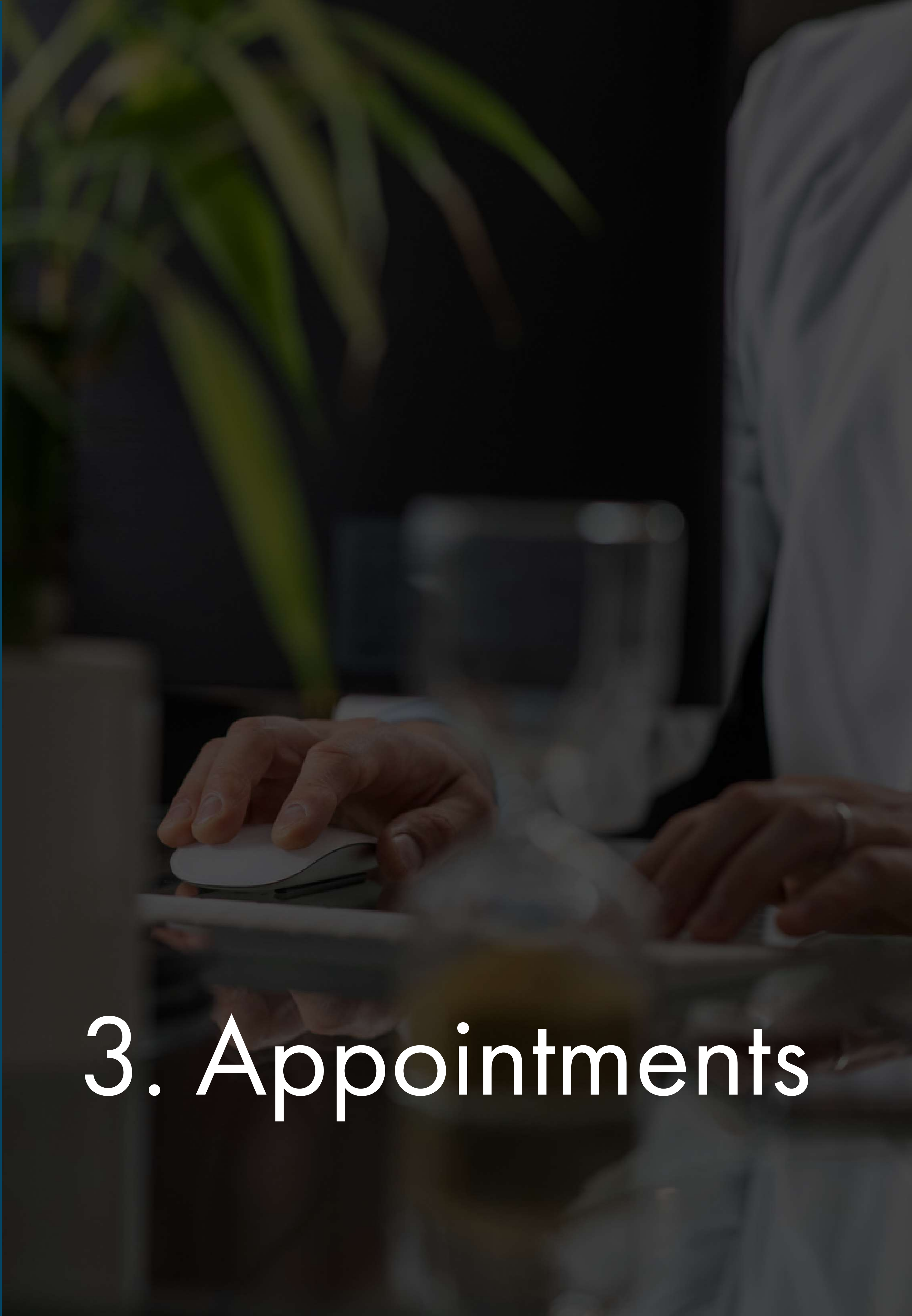
When you send a message to a patient or account holder they receive an email notification.



When the patient or account holder opens the patient portal, a number displays next to the **Messaging** menu item to indicate the number of messages received.

1. The patient or account holder clicks the Messaging icon. A new message is indicated by a red dot next to the date. Once a message has been opened the red dot no longer displays.
2. The patient or account holder clicks on a message.
3. The patient or account holder responds to message as required.





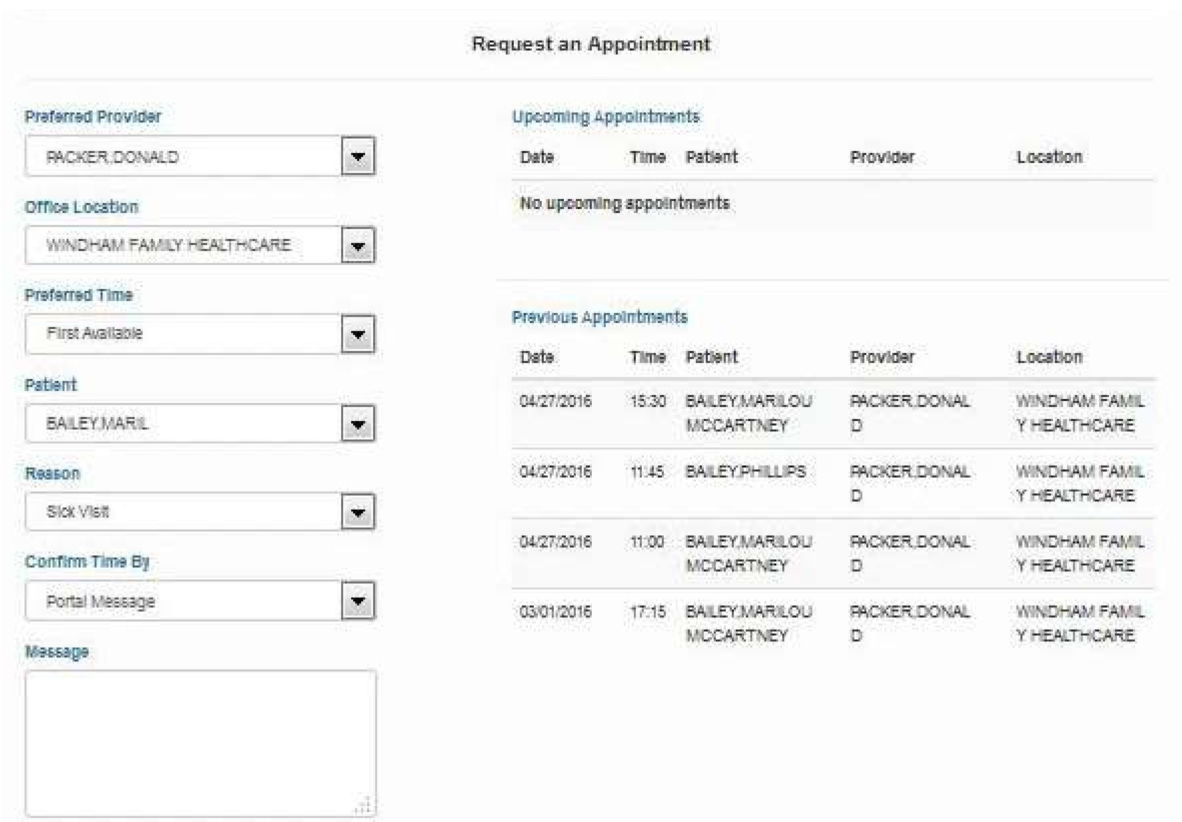
3. Appointments

3.1 REQUEST APPOINTMENTS

The account holder enters information in the **Request an Appointment** screen and click **Send** to request an appointment.

The screen also displays previous and upcoming appointment information.

If your office offers online scheduling, account holders can schedule their appointments directly from the patient portal by selecting the reason for the appointment, the location and provider, and the date and time.



Request an Appointment

Preferred Provider

PACKER,DONALD

Office Location

WINDHAM FAMILY HEALTHCARE

Preferred Time

First Available

Patient

BAILEY,MARIL

Reason

Sick Visit

Confirm Time By

Portal Message

Message

Upcoming Appointments

Date	Time	Patient	Provider	Location
No upcoming appointments				

Previous Appointments

Date	Time	Patient	Provider	Location
04/27/2016	15:30	BAILEY,MARILOU MCCARTNEY	PACKER,DONAL D	WINDHAM FAMIL Y HEALTHCARE
04/27/2016	11:45	BAILEY,PHILLIPS	PACKER,DONAL D	WINDHAM FAMIL Y HEALTHCARE
04/27/2016	11:00	BAILEY,MARILOU MCCARTNEY	PACKER,DONAL D	WINDHAM FAMIL Y HEALTHCARE
03/01/2016	17:15	BAILEY,MARILOU MCCARTNEY	PACKER,DONAL D	WINDHAM FAMIL Y HEALTHCARE

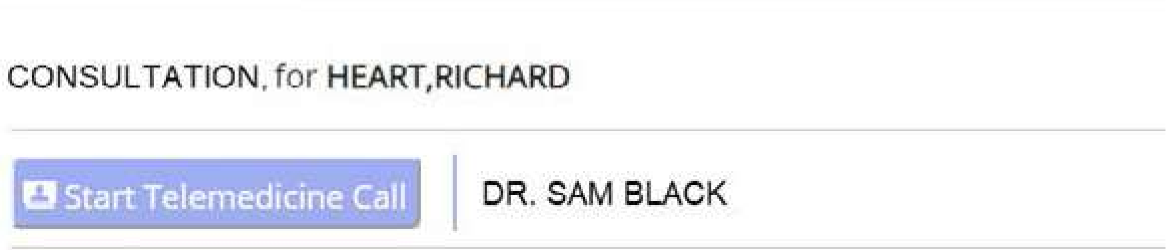
3.2 ACCESS TELEMEDICINE APPOINTMENTS

Patients can access their telemedicine appointments from the Patient Portal, if your practice has Online Scheduling and Telemedicine.

Patients must be logged in to their portal account to access their telemedicine appointment.

1. Go to **Appointments > Upcoming**
2. Click **Start Telemedicine Call**

Patients will be able to join the call according to the settings in the Telemedicine Settings screen.



IMPORTANT NOTES:
The Start Telemedicine Call button will be disabled after the time of the appointment has passed. Patients who are late to connect their telemedicine appointment will be unable to use the Patient Portal to access their telemedicine appointment. They will need to access their appointment from the link in the telemedicine confirmation email.

4. Clinical

4.1 REQUEST PRESCRIPTION REFILLS

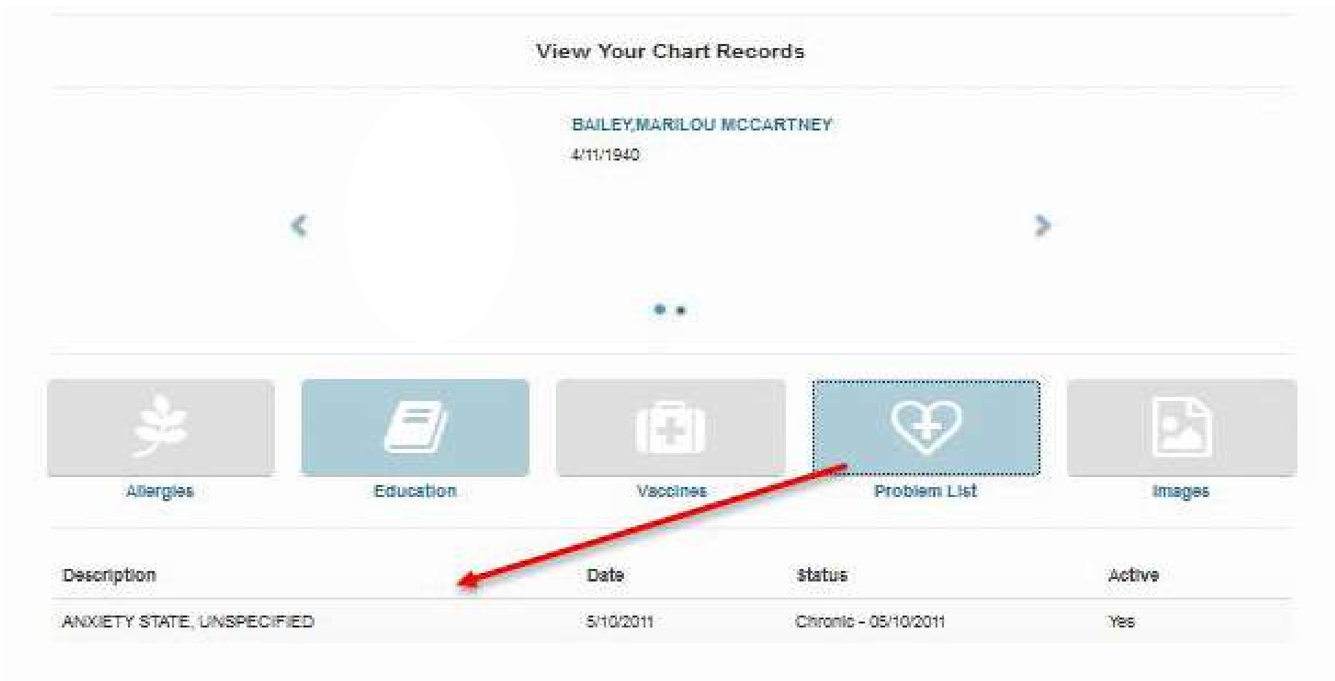
Account holders can request a refill for either a Current or Historical prescription using the patient portal.

4.2 VIEW RECORDS

Providers can enable patient chart items to display in the Patient Portal for patients to reference and review.

Remember that certain items will not be viewable in the Patient Portal if they are not correctly enabled in the EHR, such as being scanned in, added to the patient chart, located in the right folder, and selecting the Patient Viewable check box.

Once patient records are enabled to display in the Patient Portal, the account holder can select a specific type of chart item to display health information that is visit-specific.



4.3 SEND MEDICAL RECORDS

Account holders can use the Chart Summary screen in the patient Portal to view, download and send medical history for themselves and patients tied to their account.

Send medical records by going to **Records** > **Chart Summary**.

Send Secure Message

1. Select which patient records you want to send.
2. Choose a **Start Date** and **End Date**.
3. Select **Doctor/Clinical Staff (Send securely)**.
4. Click **Next**.
5. Search for the provider you want to send the records
6. Confirm that you are sending records to the correct provider
7. Click **Transmit**.

To send patient records via unsecured email

1. Select which patient records you want to send.
2. Choose a **Start Date** and **End Date**.
3. Select **Other-Email** and enter the email address.
4. Click **Next**.
5. Acknowledge sending an unencrypted email.
6. Click **Send Now**.

Go to **Records** > **Track Transmit Status** to view health record transmission statuses.

IMPORTANT NOTES:
If you choose to send to an Other-Email, you might be sharing sensitive medical information with a third party.

4.4 VIEW HEALTHWATCHER REMINDERS

Patients' HealthWatcher reminders display in the patient portal.

Reminders for appointments, procedures, labs, prescription refills, etc. display on the **Patient Card** in the portal.

Displaying reminders can improve patient compliance. When an action is overdue, an alerting icon also displays.

Portal users can remove these reminders from the **Patient Card** by selecting the check box on the item. However, this does not remove the reminder item from EHR and it will continue to display for the practice staff based on the settings you configured in EHR:

Tools > **User Preferences** > **HealthWatcher**

4.5 SUBMIT PATIENT FORMS

Patients can access, fill out, and submit patient forms prior to their appointment.

1. The patient, or responsible party, logs in to the portal. The Patient Forms icon displays with the number of forms to be completed.

2. The patient, or responsible party, clicks the Patient Forms icon on the home page. The Patient Name, Appointment Date, Form Names, and Start button displays.

3. The patient, or responsible party, clicks the Start button for a form. The form displays.

4. The patient, or responsible party, completes the patient check-in forms and takes the following actions based on the type of form they are completing:

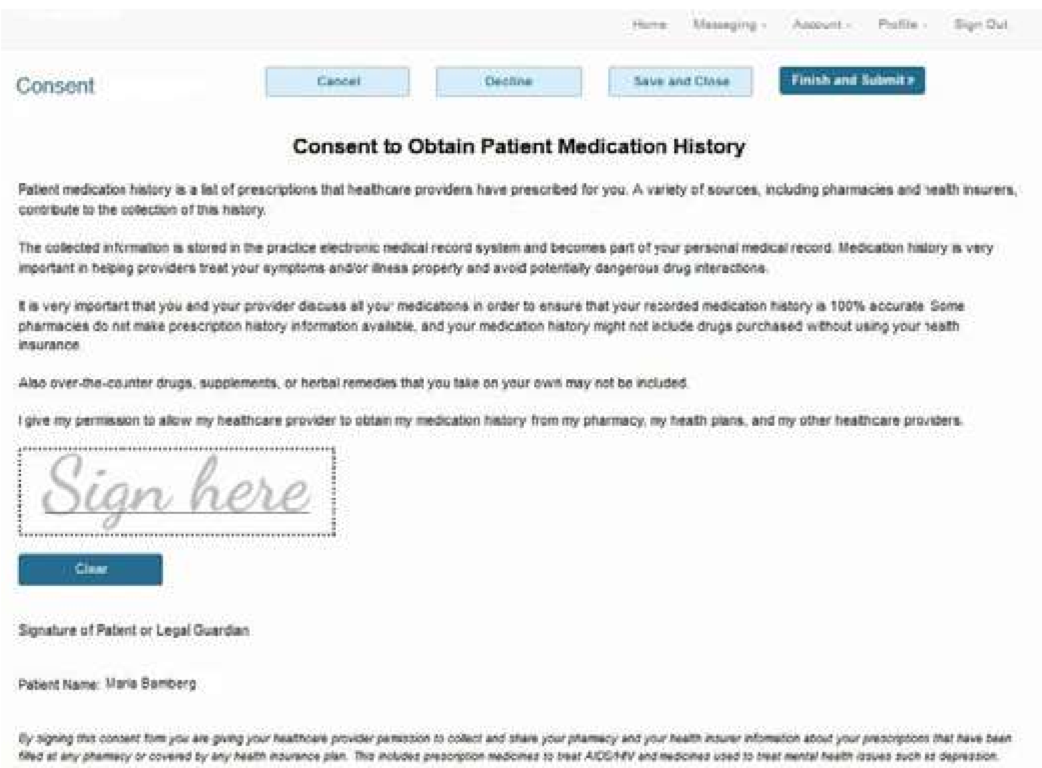
Cancel
Closes the form screen

Ask a Question
Opens the Messaging screen in the Patient Portal

Save & Close
Saves the patient's work and closes the form screen. Form status changes to Saved.

Finish & Submit
Closes the form screen and sends the form back to your office for review. Form status changes to Submitted.

Decline (Consent Form)
Closes the form screen and sends the form back to your office for review with no signature. Form status changes to Submitted in the portal Patient Forms grid, and the Status in the Patient Forms screen Review Forms tab changes to Declined to Sign.



4.6 PAY MY BILL

Account holders can check account balances and make online credit card payments. If your practice has purchased ePayments, account holders can view additional statement and payment history information.