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Patient Portal User's Guide

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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.
- Request appointments.
- Request a medication refill.
- Print or save an electronic copy of your Health Summary using the standard Continuity of Care Record (CCR) format.

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

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.

Communicating Through the Portal

Send Messages to Clinic Staff

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:

1. On the main Portal screen, click the **Messages tab**.
2. In the Actions pane 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 on “Portal, CVAOC”.
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**.

To reply to a message from clinic staff:

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

Receive 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 My Recent Messages and My Recent Results on the **Overview tab**.

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

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

1. To view lab or test results, click on the **Title** of the message.
2. 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. To view these results, click the **title of the attachment**.
3. 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.

After you open the message, you can print the message by clicking the printer icon in the toolbar of your browser, or you can right-click on the message and select Print from the pop-up menu. You can also save the message to your computer by clicking on the File menu and selecting Save As.

Ask a Billing Question

You can submit billing questions through the Patient Portal.

1. On the main Portal screen, click the **Messages tab**.

2. In the Actions pane of the Messages tab, click **Billing Question**.
3. Type your question in the field provided, then click the **Send** button.

Submit a Portal Suggestion

You can give your clinic feedback on ways to improve their Patient Portal.

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

Request a Medication Refill

Refill requests sent to the clinic via the Portal must be reviewed and approved by a clinic provider before they will be refilled.

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 pane).
3. When you click Request Refill, all medications you selected for refill appear in a Medication Refill Requests pane 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. Type any additional information concerning the refill in the notes field, and then click the **Send Request** button.

Request an Appointment

You can use the Portal to request an appointment in our office. To send a new message:

1. On the main Portal screen, click the **Messages tab**.
2. In the Actions pane 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 on “Portal, CVAOC”.
4. In the **Subject** field, type **Appointment Request**.
5. Type the **message** in the space below the Subject field with any details about your appointment request (reason, date/day, time. etc.), and click **Send Message**.

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

Fill Out 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.

1. Click on 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, and then click one of the answer buttons to go to the next question. Notice that there are buttons below the question pane that allow you to skip the question or go back to the previous question.
4. When you have answered all questions, all the questions and answers are displayed.
5. Note 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.**
6. Click **Next** to send this information to your clinic. If you don't click Next, the clinic will not be able to see your completed questionnaire. If you want, 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 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.

View or Update Your Current Medications List

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

1. Click the **Medications tab**.
2. In the My Medications pane, 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 pane, 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*.

View or Update Your Health Summary Information

To view your Health Summary Information:

1. On the main Portal screen, click the **Health Summary tab**. *On the Health Summary tab, the Health Summary pane contains links to your health information.*
2. Click on the links in the Health Summary pane 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 CCR/Health Summary** or **View Confidential CCR/Health Summary** are also included in the Health Summary pane. See the next section, *View, Print, or Copy Your Continuity of Care Record (CCR)*, 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 pane, 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 Pane 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.*

View, Print, or Copy your Continuity of Care Record (CCR)

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

You may want to take a copy of your CCR with you if you go to see another doctor, so that the new doctor will have detailed information about your health history and will be able to review all medications that you are currently taking before prescribing new medications. This promotes continuity of care between providers and is especially useful in avoiding potentially dangerous medication interactions.

Note that you can access a CCR with all information, *including information that has been marked confidential*, or you can access a CCR that does *not* show information marked confidential.

To view or print your Continuity of Care Record:

1. On the main Portal screen, click the **Health Summary tab**. Notice the Health Summary pane located on the left side of the tab. Links to view your CCR or export your CCR are included in the Health Summary pane. The View CCR/Health Summary and Export CCR/Health Summary links *include confidential information in the CCR*. The confidential information can be identified by the word "Confidential" in the Comments column. The View Confidential CCR/Health Summary and Export Confidential CCR/Health Summary links do *not* include the confidential information in the CCR.
2. To *view* your CCR, click **View CCR/Health Summary** or **View Confidential CCR/Health Summary**.
3. To *print* the CCR summary displayed, click the print icon on your browser.
4. To *save an electronic copy* of your medical record, click the **Export CCR/Health Summary** link in the Health Summary pane located on the left side of the screen. **Caution**: The Information exported will include any confidential information

recorded in your chart. If you do not want to include the confidential information, click the **Export Confidential CCR/Health Summary** link instead.

NOTE: You can save a copy of the CCR file to your computer, and you can then attach that file to an email if you need to send it to another physician electronically. This file is a recognized standard that some medical practices may be able to import into their electronic medical record if they use an electronic record system.

View or Update Your Demographic 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.*

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 pane.
4. If you have changed health insurance providers, scroll down the Edit My Demographics window to the **Add New Insurance** pane. 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.*

Update Your Portal Account Password or Email Address

You can view and update your Portal account information (examples: password, email 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**.

3. Type the updated information in the fields provided, 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.

1. In the Login area, click on the text **Did you forget your password?** *Password Retrieval is displayed*.
2. In Password Retrieval, type your **email 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**.