Patient Portal Instructions

Welcome Email

You should receive a New Patient Portal Account email to the email address you have on file with your physician's office. This contains a link to your Patient Portal, Initial User Name, and Initial Password. (Please note: you will be able to change your User Name and Password once you log into the Patient Portal).

How to log into your portal account

Click on or type in the web address of your physician's patient portal you received in your welcome email. To log in to your portal account select the "Click here to login button". Enter the Initial User Name and Initial Password from the email you received from your physician and click "Sign in".

For your protection and security purposes you will need to verify your account, please enter your date of birth and then click on "Verify".

How to view messages from your physician's office

To view your messages click on the Messages menu tab. Click on a message on the left hand column to view the contents of the message. There are several actions you can take for each message received in your inbox, including:

- Open as PDF – If you would like to save your message and any attachments click on the Open as PDF button and either Open or Save the file to your desired location. (Please note this will require Free Acrobat Reader to be installed on your computer to view the document.)

- Print a Message – If you would like to print a message click on the Print button and a print dialogue box will appear allowing you to print out the document on your desired printer.

- Forward a Message – If you would like to send a message to another doctor outside of the practice providing the patient portal, click on the Forward button. In the new window please enter the Direct secure email address of the doctor you would like to send the message to, a subject, and any message you would like to include in the email and click on the Send button. (Please note you will need to contact the doctor you would like to send the email to and obtain their Direct secure email address which is a special email address to protect your personal health information).

- Reply – If this feature is enabled on your portal you can send a message or question back to the doctor or staff by clicking on the Reply button. Enter a subject and message and click on the Send Reply button.

How to send messages to your physician's office

If this feature is enabled in your patient portal, you can click on the Send Message link in the upper right corner of the page to send a new message to the practice. Enter a Subject and Message or Question and click on the Send button.

How to view and save your medical record

You can access your medical record by selecting the Records menu tab. You have multiple options for your record including:

- View – This will allow you to view your medical record on a secure web page

- Download Text – This will save your record in an HTML format which can be saved and viewed later using a web browser

- Download Data – This will save your record in an XML format which can be uploaded to your personal health record (i.e. Microsoft HealthVault, Dossia, etc)

- Transmit – This will allow you to send your medical record to another doctor using a new email technology called Direct. Simply call the doctor you wish to send your record to and ask for their Direct secure email address. Click on the Transmit button and enter the Direct Address, a Subject and Message

and it will be delivered to the doctor along with a data format of your medical record, which in many cases can be downloaded into their electronic health record system.

How to manage your account information
You can manage your profile by clicking on the My Profile link in the upper right hand corner of the page. You can edit several settings for your portal profile, including:

- User Name

- Email Address

- Password

- Time Zone

- Preferred Language

- Opt In / Out Preference

- Family Access – allow family members and caregivers access to your account

Patient Portal Grant Family Access

Location: Patient Portal

Family Access allows a patient to designate others to log into the Patient Portal on their behalf. If a patient elects to do this, the designated person will have full access to their information.

To give a family member access:
1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. The **Current Access** section shows the number of users that currently have access to your portal.
5. If your family member doesn't have an account to the Patient Portal, fill out the top part of the screen (**Create a new user**).
   - Enter the name of the person you are adding to your account.
   - Enter a Username and Password that person will use when logging onto the Patient Portal.
   - You may also enter the Reason you are adding this person to your account.
   - Optionally, you may enter a date this person's access to your account will expire.
   - Click **Create user and grant access.**
   - Repeat step 5 for additional users as needed.
   - If finished, click the X to close.
6. If your family member already has their own account to the Patient Portal, fill out the bottom part of the screen (**Grant an existing user access**).
   - Enter the **Existing username** and **Password** of the person you are adding to your account. This would be the username and password they use to log onto their own Patient Portal.
   - You may also enter the Reason you are adding this person to your account.
   - Optionally, you may enter a date this person's access to your account will expire.
   - Click **Grant Access.**
   - Repeat step 6 for additional users as needed.
   - If finished, click the X to close.

To disable a family member's access:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Disable** button by the person's name.

To extend the expiration of a family member's access:
1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Update expiration** button by the person's name.
5. Enter the new expiration date.

To delete a family member's access and entire account:
1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Delete** button by the person's name.