

Patient Portal Help

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Log in to the Patient Portal

Use your unique log in user ID and password log in to your provider's Patient Portal. Your log in credentials guarantee that your communications with your doctor, nurse, biller, and other health care professionals are secure and confidential.

1. On your provider's welcome page, click the **Patient Portal** link. Your secure My Patient Page displays in a web browser window.
2. Next, do one of the following actions:
 - If you already have an account, enter your User ID and password and click the **Login** button.
 - If you do not already have an account, click **Create an Account**. For more information, see [Create an Account](#).
 - If you have forgotten your user ID, see [Retrieve My User ID](#).
 - If you have forgotten your password, see [Reset My Password](#).

Retrieve My User ID

Retrieve your Patient Portal user ID if you forget it, and then continue your login.

1. Click the **Forgot Your User ID?** link below the **User ID** text box.
2. Type the e-mail address you used to set up your online account.
3. Select your date of birth from the drop-down menus.
4. Click the **Retrieve User ID** button. The page refreshes and displays your user ID.
5. Return to the log in page, and use your retrieved user ID to log in.

Note: If your email address has changed, please contact your provider to have it updated so that you can reset your password.

Reset My Password

Reset your Patient Portal password if you forget it, and then continue your login.

Note: You will need the account information that you used to create your account.

1. Type your user ID in the required text field.
2. Click the **Forgot Your Password? You may reset it here** link below the **Password** text box. The page refreshes.
3. Retype your user ID in the required text field.
4. Select your date of birth from the required drop-down menus.
5. Type your e-mail address in the required text field.
6. Click the **CLICK HERE TO RESET YOUR PASSWORD** button. You will be sent an email that confirms you have reset your password.
7. Return to the log in page, and use your new password to log in.

Note: If your email address has changed, please contact your provider to have it updated so that you can reset your password.

Create an Account

In order to take advantage of the health care features that your provider offers in the Patient Portal, you must create a registered online account. Your provider uses Medfusion HealthKey, a database that stores your health care information securely. HealthKey also enables you and your provider to share your health information with other HealthKey-participating providers. For more information, see [HealthKey](#).

1. Click the **Create an Account** button on the My Patient Page.
2. Type your name, Zip code, e-mail address, and select your date of birth in the required fields.
3. Click the **Create My Account** button. The Create an Account page displays. **Note:** If a disclaimer message indicates that you already have a Healthkey account, then you have previously registered with either this Medfusion provider or another Medfusion provider. If you don't remember your ID and/or password for your existing account, you must go to the provider web site where you are already registered to retrieve your user ID and password. **If no disclaimer displays, skip to the next step.**
4. Enter additional demographic information, including your gender, mailing address, telephone number, and any other required information that is marked by a red asterisk.
5. Type a user ID and password, and then retype your password in the required fields. **Note:** Your user ID must be at least 6 characters long, and your password must satisfy the **Password strength** indicator. After you successfully retype your password, a check mark displays beside the reentered password. Be sure to write down your user ID and password because your provider will not be able to look up this information.
6. Select a secret question from the drop-down menu such as "What is the name of the city where I was born?"
7. Type your answer in the **Answer** text field. Be sure to note the spelling and case of your answer, for example, "new york" or "New York."
8. Select your preferred location from the drop-down menu.
9. Read the provider's privacy information, and then click the check box to acknowledge that you have received this information.
10. Click the **Join [your provider's name]** button.
 1. If your provider requires that you complete a preregistration form, you will be directed to a new page on which to begin filling out the form. Go to the next step.
 2. If your practice does not require a preregistration form, you will be directed to your My Patient Page.
 3. If you would like, you may log out and come back at a later time to complete your preregistration.
11. Continue to enter your personal information on the preregistration form. You may click **Next** or **Previous** to navigate through the form until you have provided all of the required preregistration information. For more information, see [Complete My Registration Form](#).
12. Click the **Submit** button when you have completed your preregistration. The page refreshes. If you would like, click the **Pre-registration Form** link to open your health form in Adobe Acrobat Reader for viewing and printing.

Note: You can re-use your Secure Patient Portal user ID and password (Healthkey account) for all web site portals powered by Medfusion, except for those providers that have explicitly opted out.

HealthKey

Patient Portal users can access other healthcare providers that use patient portals if those providers use HealthKey. HealthKey is a feature that enables providers to share patient demographic and insurance information with other participating providers. Patients use a single username and password to access these health care provider web sites.

HealthKey also enables parents to create a single family account with other HealthKey providers using a single username and password. Parents are able to log into their child's provider and create an associated account. When a parent logs in to his or her child's provider for the first time, the system will automatically create an account on the new provider's web site.

Note: If a disclaimer message indicates that you already have a HealthKey account as you are setting up your online account, then you have previously registered with either this provider or another HealthKey provider. If you don't remember your ID and/or password for your existing account, you must go to the provider web site where you are already registered to retrieve your user ID and password.

My Patient Page

The My Patient Page is your personal and secure home page. When you log into your doctor's Patient Portal using a valid user ID and a password, you are automatically directed to the My Patient Page. Your name displays in the Welcome message at the top of your home page, assuring that you are logged into your home page.

On the My Patient Page, you will find links to all of the information you need to communicate with your doctor and the provider's staff, as well as information about your online account and links to various features that your provider offers. For example, you can navigate to the page on which to request an appointment with your doctor by clicking *either* the **Appointment Requests** icon or the **Appointment Requests** link.

On the My Patient Page, you can also read and reply to secure communications with your provider:

1. Click the **My Messages** link. Your **Inbox** messages display.
2. Click the **My Inbox** link. Your **Inbox** messages display. For more information, see [View My Inbox Messages](#).
3. Click the **My Labs** link. Your **My Labs** messages display. For more information, see [View My Lab Messages](#).
4. Click the **Sent Messages** link. Your **Sent Messages** display. For more information, see [View My Sent Messages](#).

My Account

You can modify your account profile, e-mail address, password, account preferences, credit card, insurance, and family information on the various tabs that display on this page. Select the links below for instructions on how to complete these tasks.

- [Change My Profile](#)
- [Change My E-mail Address](#)
- [Change My Password](#)
- [Change My Preferences](#)
- [Change My Wallet](#)
- [Change My Insurance Details](#)
- [Change My Family Account](#)

Note: Depending on the provider, you may not see all of these features on the My Account page.

Change My Profile

You can modify the demographic information that displays on your My Account page. The provider can also access this information and assist you with updating it in the office, if necessary.

1. On the My Patient Page, click the **My Account** link. Your demographic information displays on the **Profile** tab.
2. Modify any of the information that needs to be updated. **Note:** Information is required in fields that are marked with a red asterisk.
3. If you would like to upload a photograph of yourself, click the **browse** button. Select the picture from your local drive and click **Open**. Supported file formats include jpg, gif, and tiff. Your photo will be resized to be no more than 110 pixels x 110 pixels. When you check in for your next appointment, the front desk person will confirm that your photograph is a reasonable likeness.
4. After making your changes, click the **Update Profile** button. To cancel the operation, click the **Cancel** button.

Change My Email Address

You can modify the e-mail address that your provider uses for various communications. The provider can also access this information and assist you with updating it in the office, if necessary.

1. On the My Patient Page, click the **My Account** link, and then select the **E-mail** tab.
2. Type your old e-mail address.
3. Type your new e-mail address, and then retype it to ensure that you have entered it correctly.
4. Click the **Update Email Address** button.

Note: Your e-mail address is used by your provider for non-secure communications only. For example, your provider may send you an e-mail to announce the availability of flu shots or the opening of a new practice location. However, all communications that involve personal health record information, including lab results, are sent from your provider to your inbox in the Patient Portal, which is password-protected.

Change My Password

You can modify the password that you use to gain secure access to your personal health information.

1. On the My Patient Page, click the **My Account** link, and then select the **Password** tab.
2. Type your old password.
3. Type your new password, and then retype it to ensure that you have entered it correctly. Your password should be at least 6 characters in length. **Note:** Be sure to write down your new password because your provider will not be able to look up this information.
4. Click the **Update Password** button.
 - *If you are linked to a family account as a dependent*, you will break the link to the family account when you change your password. You will need to log out and then log back in to remove the "Account linked to: [family account holder's name]" text that displays above your **"Welcome"** message.
 - *If you change your password back to the original password that was established for you by the family account holder*, you will restore your link to the family account.

Change My Preferences

You can modify your preferences, secret question, and choose which e-mail communications you wish to receive from your provider.

1. On the My Patient Page, click the **My Account** link, and then select the **Preferences** tab.
2. Select your location and provider preferences, and your statement delivery and e-mail format preferences.
3. Click the **Update Your Preferences** button.
4. Select a secret question, and type the answer in the required text field. If you ever forget your password, you will be prompted for this answer to confirm that you are authorized to log into your account on the Patient Portal.
5. Click the **Update Secret Question** button.
6. Select the types of e-mail messages that you would prefer *not* to receive.
7. Click the **Set Opt Out Preference** button.

Change My Wallet

You can modify your current credit card information and add additional credit cards. Your credit card information is required if you will be using any of the provider's features that use credit card billing, from which you can choose when paying for a provider feature.

1. On the My Patient Page, click the **My Account** link, and then select the **Wallet** tab.
2. *If no credit card information displays.* Provide your credit card information in the required fields.
3. *If your current credit card information needs to be updated,* such as changing the card expiration date. Select the radio button beside the card member's name, and click the **Click here to edit link** to make the appropriate changes in the required fields.
4. *If you would like to add another credit card.* Click the **Click here to add a new Credit Card** link, and provide your credit card information in the required fields.
5. *If you would like to remove a credit card* from the list of cards on file with your provider. Select the radio button beside the card member's name, and click the **Click here to delete** link.
6. Click the **Submit** button when you have finished making your changes, or click the **Cancel** button to cancel your changes.

Change My Insurance Details

You can add new insurance information and modify existing information as needed, for example, if you change insurance carriers or add a child to your family account.

1. On the My Patient Page, click the **My Account** link, and then select the **Insurance** tab.
2. Provide your insurance information in the required fields. **Note:** If you do not have medical insurance, then please select **Self-Pay** from the **Insurance Type** drop-down menu.
3. Click the **Save Insurance** button when you are finished.

Change My Family Account

Family accounts allow multiple people to be connected under one user ID and password. One person can then act as a proxy for others when using the Patient Portal's secure communication features. For example, a parent can create an account and link his or her children to that account.

Related topics: [Create and Link a Dependent Account to a Family Account](#) and [Link an Existing Account to a Family Account](#)

Create and Link a Dependent Account to a Family Account

You can create one or more new patient accounts, and then link those accounts to your account. Your account becomes a "family" account, and you become the "account holder." All of the accounts that you create and link to your family account are referred to as "dependent" accounts.

Typically, the family account belongs to a parent, and the linked account(s) belong to a spouse, child, sibling, or other relation. If you are the account holder, you can access each of the dependent accounts using your own user ID and password. Dependents can access their accounts using their own user ID and password, but only the account holder has permission to unlink, relink, and remove dependent accounts once they are linked to a family account.

Important: When the family account holder creates and links dependent accounts, the account holder should maintain the same password and e-mail address for the dependent accounts as for the family account. This will ensure that the family account holder will be able to access the dependent accounts. However, if the family account holder intends to allow the dependent accounts to select their own passwords, these dependent accounts will be unlinked from the family account. In this case, the family account holder has the option either to relink or remove the dependent account(s).

For more information on linked accounts, see [Link an Existing Account to a Family Account](#).

1. On the My Patient Page, click the **My Account** link, and then select the **Family** tab.
2. Click the **Create a Family Member** link.
3. On the Create an Account page, provide the required information for your family member.
4. If your family member's demographic information is different from your own, click the appropriate **Click to edit** links, and provide the required information. For example, you may want to change the e-mail address from your own to the family member's address so that your dependent receives a welcome message from the practice. Also, you should assign a new user ID and password, along with a secret question and answer. The new user ID is included in the e-mail from the practice. **Note:** After you create the new dependent account, you must tell your dependent what the password is to his or her account; otherwise, your dependent will not be able to log in to the Patient Portal.
5. Read the provider's privacy information, and then click the check box to acknowledge that you have received this information.
6. Click the **Join [your provider's name]** button. The following results occur:
 1. The new family member's name displays on a tab above the "**Welcome [master account holder's name]**" text.
 2. The message, "[Family member's name] has been linked to your account," displays below the "My Patient Page" title.
 3. The practice sends a "Welcome" e-mail that includes the user ID of the new family member account. By default, your user ID appended by a numerical suffix is assigned to each new dependent account unless you assign a unique user ID to the new dependent account. For example, if your user ID is "HThoreau," then the first new account that you create and link is automatically assigned the user ID "HThoreau-2" unless you assign a unique user ID.
7. Either the account holder or the new, linked dependent must complete the following account actions:
 1. Log in to the Patient Portal with the user ID that is contained in the practice "Welcome" message.
 2. *If your provider requires that you complete a preregistration form*, you will be directed to a new page on which to begin filling out the form for the new patient account. For more information, see [Create an Account](#).
 3. *If your practice does not require a preregistration form*, you will be directed to the My Patient

Page for the new account. From here, you may change the account password and e-mail address, if desired.

8. As the account holder, you can access a linked dependent's account information, unlink/relink a dependent, and remove a dependent from your account. On the **Family** tab, do these actions, as needed:
 1. *To access a family member's account*, click the family member's tab above the "**Welcome**" text. The message, "Are you sure you want to switch the Active Account to [family member's name]?" displays. Click **OK**. You can now view and modify the linked account's patient information.
 2. *To unlink a family member's account*, click the **Unlink Dependent** link. You are prompted to confirm the unlinking. Click **OK**. Verify that the patient's name, user ID, and e-mail address match the dependent you want to unlink, and then click the **Unlink** button. The unlinked family member no longer displays on a tab above the "**Welcome**" text.
 3. *To relink a dependent member's account that you previously unlinked*, click the **Relink Dependent** link. You are prompted to confirm the unlinking. Click **OK**. Type the password that is associated with the family member's username, and then click the **Submit** button. The relinked account displays in the list of family accounts on the **Family** tab.
 4. *To remove a dependent member's account from the family account*, click the **Remove Dependent** link. You are prompted to confirm that you want to remove the account. Click **OK**. Verify that the patient's name, user ID, and e-mail address match the dependent you want to unlink, and then click the **Unlink** button. The removed family member no longer displays on a tab above the "**Welcome**" text.

Note: When a dependent who is linked to a family account logs in to the Patient Portal, the message "Account linked to: [account holder's name]" displays above the "**Welcome [dependent's name]**" text. The dependent cannot view other dependent's who are linked to a family account.

Here is a typical family account linking scenario:

John and Abby Adams created accounts with the Boston Medical Group when they moved to the city several years ago. After each child was born, John set up a separate account for Charles and for Beth since the practice sees children as well as adults. John's brother, Sam, works in Boston, so he has an account with this practice as well. If the family agreed to share their user ID and passwords with John, he could link his account to Abby's, Charles', Beth's, and Sam's accounts. Each family member could still log in with his or her own user ID and password and use the Patient Portal to access their account information and the practice's features. However, only John would be able to log in to his "master" account and view all of their accounts at the same time. Also, only John would be able to unlink family account members.

Link an Existing Account to a Family Account

If you are a family member with an online account, and other members of your family have their own online accounts, you can link your account to their accounts. Your account becomes the "family" account, and you become the family "account holder." The linked family member account(s) become the "dependent" account(s). To be able to create a link to an existing account, you must know the user ID and password of the dependent account(s).

Typically, the family account belongs to a parent, and the linked account(s) belong to a spouse, child, sibling, or other relation. If you are the family account holder, you can access each of the dependent accounts using your own user ID and password. Moreover, only the family account holder is able to unlink, relink, and remove dependent accounts.

Important: When the family account holder links dependent accounts, the account holder should maintain the same password and e-mail address for the dependent accounts as for the family account. This will ensure that the family account holder will be able to access the dependent accounts. However, if the family account holder intends to allow the dependent accounts to select their own passwords, these dependent accounts will be unlinked from the family account. In this case, the family account holder has the option either to relink or remove the dependent account(s).

For more information on creating and linking accounts, see [Create and Link a Dependent Account to a Family Account](#).

1. On the My Patient Page, click the **My Account** link, and then select the **Family** tab.
2. Click the **Link an Existing Family Member** link.
3. Type the user ID and password of the existing family member account that you want to link to your account.
4. Indicate your relationship to this person, e.g., parent, spouse, sibling, child, or other.
5. Click the **Submit** button. The new linked family member's name displays on a tab above the "Welcome [your name]" text.
6. As the account holder, you can access a linked dependent's account information, unlink/relink a dependent, and remove a dependent from your account.
7. On the **Family** tab, do these actions, as needed:
 1. *To access a family member's account*, click the family member's tab above the "Welcome" text. The message, "Are you sure you want to switch the Active Account to [family member's name]?" displays. Click **OK**. You can now view and modify the linked account's patient information.
 2. *To unlink a dependent account from the family account*, click the **Unlink Dependent** link. You are prompted to confirm the unlinking. Click **OK**. Verify that the patient's name, user ID, and e-mail address match the dependent you want to unlink, and then click the **Unlink** button. The unlinked family member no longer displays on a tab above the "Welcome" text and in the list of family accounts on the **Family** tab. **Note:** A dependent may unlink his or her account from the family account by logging in and changing the dependent account password. The family account holder will be able to see that the password has been changed because the dependent account will be identified as "Unlinked." The family account holder may choose to relink or remove the unlinked dependent account.
 3. *To relink a dependent account to the family account*, click the **Relink Dependent** link. You are prompted to confirm the relinking. Click **OK**. Type the family member's password, and then click the **Submit** button. The relinked account displays as "Linked" in the list of family accounts on the **Family** tab. **Note:** The family account holder can relink a dependent account only if the dependent has changed his or her password prior to your logging in to the family account.

4. To remove a dependent account from the family account, click the **Remove Dependent** link. You are prompted to confirm that you want to remove the account. Click **OK**. Verify that the patient's name, user ID, and e-mail address match the dependent you want to unlink, and then click the **Unlink** button. The removed family member no longer displays on a tab above the **"Welcome"** text and in the list of family accounts on the **Family** tab. **Note:** The family account holder can remove a dependent account only if the dependent has changed his or her password prior to your logging in to the family account.

Note: When a dependent who is linked to a family account logs in to the Patient Portal, the message "Account linked to: [account holder's name]" displays above the **"Welcome [dependent's name]"** text. The dependent cannot view other dependent's who are linked to a family account. Also, once a dependent is linked to a family account, the dependent cannot create a link to a parent's account.

Here is a typical family account linking scenario:

John and Abby Adams created accounts with the Boston Medical Group when they moved to the city several years ago. After each child was born, John set up a separate account for Charles and for Beth since the practice sees children as well as adults. John's brother, Sam, works in Boston, so he has an account with this practice as well. If the family agreed to share their user ID and passwords with John, he could link his account to Abby's, Charles', Beth's, and Sam's accounts. Each family member could still log in with his or her own user ID and password and use the Patient Portal to access their account information and the practice's features. However, only John would be able to log in to his "master" account and view all of their accounts at the same time. Also, only John would be able to unlink family account members.

My Messages

From the My Patient Page, you can access your communications with your doctor, nurse, biller, or other staff member, as well as review lab results.

- Messages that are sent to you from your provider display on the the **My Inbox** tab. For more information, see [View My Inbox Messages](#).
- Messages that direct you to your lab results display on the **My Labs** tab. For more information, see [View My Lab Messages](#).
- Messages that you sent to your provider display on the **Sent Messages** tab. For more information, see [View My Sent Messages](#).

View My Inbox Messages

View the messages that your provider sends you in response to your health questions, for example, Ask a Doctor, Symptom Assessment, and Virtual Office Visit, if your provider offers these features.

1. On the My Patient Page, navigate to your **Inbox** messages using one of these methods:
 - Click the **My Messages** icon
 - Click the **Inbox** link beside the **My Messages** icon.
 - Click the **My Messages** link in the side or top menu.
2. Select a message status by clicking either the **Unread** or the **Read** radio button.
3. Select a date range. Your selection must fall within a three-month time span, for example, Jan 1, 2010-March 1, 2010.
4. Click the **Search Messages** button. The page refreshes and displays your search results in a table. If no results are available, the message "No Records Found" displays.
5. Select the message to view its contents. The page refreshes and displays the **Message Details**.
6. If you would like to view, save, and/or print the message as an Acrobat PDF document, click the **View as PDF** link. The message will display as a PDF document in a separate web browser window.
7. If the message includes a section called **Send a Secure Message**, you may send a response. Type a subject and body text in the appropriate text fields, and add attachments, if desired. Click **Submit Message**. Your response displays on the **Sent Messages** tab.

Note: To ask a question of your doctor or other staff members, you must use one of the provider's features, such as Appointment Requests or Ask a Doctor. You cannot initiate a new message directly from your inbox.

View My Sent Messages

View messages that you send in response to messages that your provider sends to you.

1. On the My Patient Page, navigate to your sent messages using either of these methods:
 - Click the **My Messages** icon, and then the **Sent Messages** tab.
 - Click the **Sent Messages** link.
2. Select a date range. Your selection must fall within a three-month time span, for example, Jan 1, 2010-March 1, 2010.
3. Click the **Search Messages** button. The page refreshes and displays your search results in a table. If no results are available, the message "No Records Found" displays.
4. If you want to read the full text of a message, click anywhere on a highlighted message row. The page refreshes and displays the **Message Details**.
5. If you want to format the full text of a message as a PDF document for printing or saving to your computer, click the **View as PDF** link. The message opens in a new browser window as an Adobe Acrobat PDF document.

Note: Your provider may choose not to allow a patient to respond to a communication if, for example, the doctor prefers that the patient set up an appointment to discuss further health concerns.

View My Lab Messages

View messages that your provider sends you that include links to your lab results.

1. On the My Patient Page, navigate to your lab results messages using either of these methods:
 - Click the **My Messages** icon, and then the **My Labs** tab.
 - Click the **My Labs** link.
2. Select a message status by clicking either the **Unread** or the **Read** radio button.
3. Select a date range. Your selection must fall within a three-month time span, for example, Jan 1, 2010-March 1, 2010.
4. Click the **Search Labs** button. The page refreshes and displays your search results in a table. If no results are available, the message "No Records Found" displays.
5. If you want to read the full text of a lab result message, click anywhere on a highlighted message row. The page refreshes and displays the **Message Details**.
6. If you want to format the full text of a lab result message as a PDF document for printing or saving to your computer, click the **View as PDF** link. The message opens in a new browser window as an Adobe Acrobat PDF document.

Make an Appointment Request

Use this feature to request an appointment date and time to consult with your doctor, physician's assistant, or other health care professional.

Note: If you have a critical care health concern, please contact your doctor directly by telephone, or dial 911 in the event of an emergency.

1. On the My Patient Page, navigate to the Appointment Request feature using one of these methods:
 - Click the **Appointment Requests** icon
 - Click the **New Request** link beside the **Appointment Requests** icon.
 - Click the **Appointment Requests** link in the side or top menu.
2. On the **Request an Appointment** tab, select a preferred provider location, provider, and insurance if more than one selection is available. **Note:** The **Preferred Insurance** selection list is only available if your provider has activated it for the Patient Portal.
3. Click **Continue**. The page refreshes.
4. Provide the following required information:
 - Preferred time frame
 - Preferred appointment day
 - Preferred appointment time
 - Reason for appointment
 - Importance preference: day/time/provider
 - Home telephone number (if you update your home, mobile, and work telephone numbers, these changes will be reflected in your account information)
 - Health concerns and scheduling needs (optional)
5. Click **Continue**. The page refreshes and displays the details of your request.
6. Visually confirm your request. If you would like to make a change, select **Change Details**. Make your changes, and then click **Continue**.
7. Click **Submit Request**. The page refreshes and displays a thank you message. **Note:** You will receive a confirmation e-mail when the practice processes your request.
8. [Optional] If your provider offers this feature, click the [Provide a Symptom Assessment](#) link to complete an assessment of your current symptoms for your doctor to review prior to your appointment.

Related topic: [View My Appointment Request History](#)

View My Appointment Request History

Check your appointment request history after you request an appointment.

1. Click the **Request History** link on the My Patient Page, or select the **Appointment Request History** tab on the Appointment Request page. The **Status** column indicates whether or not your appointment is still being processed, or if it has been approved or cancelled.
2. *If your provider approves your request*, the day and time of the appointment displays in the **Scheduled Date** column on the **Appointment Request History** tab. Select the message to view its contents.
 1. *If your provider has included an attachment*, click the attachment link to open it as a Microsoft Word document.
 2. *If your provider has allowed a response*, you may click the **Reply to this message** link. For more information, see step 7 in [View My Inbox Messages](#).
 3. *If you would like to add the appointment date and time to a Microsoft Outlook calendar*, click the **Add to Outlook Calendar** link.
 4. *If you would like to view, save, and/or print the appointment details as an Acrobat PDF document*, click the **View as PDF** link. The details will display as a PDF document in a separate web browser window.
3. *If your provider does not approve your request*, the provider will send you a secure message that you can access either on your **My Inbox** tab or on the **Appointment Request History** tab. Select the message to view its contents. For more information, see [View My Inbox Messages](#).

Note: At any time, you can view all of your provider's responses to a single appointment request. Select the request on the **Appointment Request History** tab. Message details are listed in chronological order, from most recent to oldest.

Related topic: [Make an Appointment Request](#)

Ask a Doctor (or other provider)

Use this feature to ask your provider non-acute care questions concerning your health, medications, or billing. Depending on the practice, the Patient Portal may provide links to more than one "Ask a..." feature, such as Ask a Doctor, Ask a Nurse, Ask a Biller, and so on, which function similarly. This Help topic describes the Ask a Doctor feature. Your provider may charge a fee for using this feature.

Note: If you have a critical care health concern, please contact your doctor directly by telephone, or dial 911 in the event of an emergency.

1. On the My Patient Page, navigate to the Ask a Doctor feature using one of these methods:
 - Click the **Ask a Doctor** icon
 - Click the **New Question** link **Ask a Doctor** icon.
 - Click the **Ask a Doctor** link in the side or top menu.
2. On the **New Question** tab, select your preferred location and staff member, if more than one selection is available.
3. Type a brief, yet informative subject in the text box.
4. Type your question in the text box. Use specific details to describe your problem, such as when it started, how long it has lasted, and what you think caused it. For example, "I started having intestinal cramping around 11pm last night, followed by several bouts of diarrhea until about 6 this morning. I took my temperature around 3am and it was normal. This morning the cramping is better, but I am not sure whether I should eat anything today. What should I do?"
5. Review the waiver of liability, and then click **Continue**. The page refreshes and displays your question, including the fee that is associated with the Ask a Doctor feature, if applicable.
6. If applicable, provide your credit card information. If your card is already on file, review your credit card information to be sure it is up-to-date. If you would like to use a credit card that is not on file, click the **Add a new credit card** button, and provide the required information.
7. Click the **Submit Question** button.
8. If the question is set up to handle file attachments, click **Browse** to locate, select, and upload the appropriate file. For example, you may want to provide your doctor with a health record from another provider.
9. Click the **Continue** button to submit your question to your provider. The page refreshes and displays a thank you message.
10. Click the **Click here to return to the My Patient Page** link. You will receive an e-mail notifying you to log on to the Patient Portal to retrieve your provider's response in your inbox. Please allow at least 24 hours for your provider to respond.
11. If you would like to view a list of all your questions, click the **Request History** link under the Ask a Doctor feature. To display details about your question, select the question date in the **Request Time** column.

Make a Virtual Office Visit

Use this feature to consult your doctor about a health problem when you cannot physically visit the doctor's office. Based on your responses to a series of questions, your provider may recommend a treatment plan along with prescription medication. For example, your doctor may be able to diagnose an upper respiratory infection that requires antibiotic treatment. Your provider may charge a fee comparable to an office visit for using this feature.

Note: If you have a critical care health concern, please contact your doctor directly by telephone, or dial 911 in the event of an emergency.

1. On the My Patient Page, navigate to the Virtual Office Visit feature using one of these methods:
 - Click the **Virtual Office Visit** icon
 - Click the **New Visit** link beside the **Virtual Office Visit** icon.
 - Click the **Virtual Office Visit** link in the side or top menu.
2. On the Virtual Office Visit page, select your preferred provider and insurance, if more than one selection is available.
3. *If you need to modify your insurance information*, click the **View My Insurance Details** link. The page refreshes and displays your information on the **Insurance** tab.
 1. *To update the information*, click the **Edit** link, select the correct insurance type from the drop-down menu, make the necessary changes, and click **Save Insurance**.
 2. *To delete the insurance*, click the **Delete** link, confirm that you want to delete this insurance, select another type of insurance from the drop-down menu, provide the required information, and click **Save Insurance**.
 3. *To cancel any changes that you make during this session*, click the **Click here to cancel editing** link if, after reviewing your information, you do not want to make any changes.
4. Click the **Continue** button.
5. Select a complaint from the drop-down menu, or specify a complaint in the box provided, and then click the **Continue** button.
6. Select a pharmacy from the drop-down menu; if your pharmacy is not listed, specify a pharmacy name and telephone number.
7. If your provider charges for this feature, the **Total Fees** amount displays. Confirm that your credit card number and expiration date are correct, and provide a CVV code, if required. Alternatively, you can add another credit card or delete your current credit card.
8. Read the waiver of Liability and Informed Consent to release your medical records, and click the **Agree and Continue** button.
9. Answer a series of questions about the chief complaint that you identified in step 8. Based on your responses, you may be asked additional questions. **Note:** You may click the **Go back a question** button at any time to revise a response.
10. Answer the questions about your vital signs, including required responses for the date they were recorded, your height, and weight, and then click the **Submit Vitals Information** button.
11. If the question is set up to handle file attachments, click **Browse** to locate, select, and upload the appropriate file. For example, you may want to provide your doctor with a health record from another provider.
12. [Optional] Type a detailed message about your complaint in the text box.
13. Click the **Continue** button to submit your question to your provider. The page refreshes and displays a thank you message.
14. Click the **Click here to return to the My Patient Page** link. You will receive an e-mail notifying you to log on to the Patient Portal to retrieve your provider's response in your inbox. Please allow at

least 24 hours for your provider to respond.

Provide a Symptom Assessment

Use this feature before you are scheduled for an office visit to provide your doctor with an assessment of your current symptoms. Based on your responses to a series of questions, your provider may respond with follow-up questions or treatment recommendations prior to your office visit. Typically, there is no fee associated with using this feature.

Note: If you have a critical care health concern, please contact your doctor directly by telephone, or dial 911 in the event of an emergency.

1. On the My Patient Page, navigate to the Symptom Assessment feature using one of these methods:
 - Click the **Symptom Assessment** icon
 - Click the **Start New** link beside the **Symptom Assessment** icon.
 - Click the **Symptom Assessment** link in the side or top menu.

Note: Your provider may offer a link to the Symptom Assessment feature on the Appointment Request "Thank you" page.
2. On the Symptom Assessment page, select your preferred provider's location, if more than one selection is available, and then click the **Submit Location** button.
3. Select your preferred provider, and then click the **Submit Provider** button.
4. Type a brief, yet informative symptom in the text box, and then click the **Submit Symptom** button.
5. Select the reason for your visit from the drop-down menu, or specify a reason in the box provided, and then click the **Next** button.
6. Answer a series of questions about your symptoms. Based on your responses, you may be asked additional questions. **Note:** You may click the **Go back a question** button at any time to revise a response.
7. When you have finished answering all of the questions about your symptoms, click the **Continue** button to submit your symptom assessment to your provider. The page refreshes and displays a thank you message.
8. Click the **Click here to return to the My Patient Page** link. You will receive an e-mail notifying you to log on to the Patient Portal to retrieve your provider's response in your inbox. Please allow at least 24 hours for your provider to respond.

Request a Prescription Renewal

Use this feature to make an online prescription renewal request from the pharmacy of your choice. The Prescription Renewal feature is more convenient than contacting your provider or pharmacy in person or by telephone. Your provider may charge a fee for using this feature.

1. On the My Patient Page, navigate to the Prescription Renewal feature using one of these methods:
 - Click the **Prescription Renewal** icon
 - Click the **New Request** link beside the **Prescription Renewal** icon.
 - Click the **Prescription Renewal** link in the side or top menu.
2. On the Prescription Renewal page, select your preferred provider's location, if more than one selection is available, your preferred provider's name, and then click the **Continue** button.
3. Review the "Please Note" message. If your provider charges for this feature, the **Prescription Renewal Fee** also displays.
4. *If you need to modify your insurance information*, click the **View My Insurance Details** link. The page refreshes and displays your information on the **Insurance** tab.
 1. *To update the information*, click the **Edit** link, select the correct insurance type from the drop-down menu, make the necessary changes, and click **Save Insurance**.
 2. *To delete the insurance*, click the **Delete** link, confirm that you want to delete this insurance, select another type of insurance from the drop-down menu, provide the required information, and click **Save Insurance**.
 3. *To cancel any changes that you make during this session*, click the **Click here to cancel editing** link if, after reviewing your information, you do not want to make any changes.
5. In the **Medication(s)** section, do one or more of the following actions, as needed:
 1. *To renew a current medication*, select the check box to the left of the drug name.
 2. *To renew and edit the information on file for a current medication*, select the check box, and then click the **Edit** link. Modify the medication information, as needed. For example, you may want to alert your doctor about a drug's side effects, which you can type in the **Additional Information** text box.
 3. *To request a renewal for a medication that does not display here*, click the **Click here to add another medication** link. Provide the drug name and dosage, plus any additional information that will help the doctor identify the medication.
6. Select a pharmacy from the drop-down menu; if your pharmacy is not listed, specify a pharmacy name and telephone number.
7. Click the **Submit Prescription Renewal Request** button. The page refreshes and prompts you to confirm your prescription request(s).
8. Click the **Submit Request** button to forward your prescription request to your provider. The page refreshes and displays a thank you message. You will receive an e-mail notifying you to log on to the Patient Portal to retrieve your provider's response in your inbox. Please allow at least 24 hours for your provider to respond.

View My Lab Results

Use this feature to view the lab results that are posted to the secure TeleVox LabCalls server by your provider. Your provider will send you an e-mail with instructions that describe how to access your lab results in the Patient Portal and your TeleVox log in information. You may also receive a message from your provider that you can view on the **My Labs** tab on the My Patient page. The TeleVox Lab Results Inquiry System opens in a separate web browser window.

1. On the My Patient Page, navigate to the TeleVox Lab Results Inquiry System using one of these methods:
 - Click the **Lab Results** icon
 - Click the **View** link beside the **Lab Results** icon.
 - Click the **Lab Results** link in the side or top menu.
 - Click the **My Labs** tab, select the message that indicates your results are ready to be viewed, and then click the link inside the message.
2. On the Lab Results Inquiry System page, type your **Customer/Client Number**, **Client Login/UID**, and **PIN**, and then click the **Login** button. You may check the **Remember Me** box if you would like TeleVox to remember your log in credentials. The page refreshes and displays your lab results.
3. Click the **Logout** button when you are ready to leave the Lab Results Inquiry System.

Make an Online Bill Payment

Use this feature to make an online bill payment when you use services such as Ask a Doctor, Virtual Office Visit, and Prescription Renewal if they are offered by your provider, and if your provider chooses to charge a fee.

1. On the My Patient Page, navigate to the Online Bill Pay feature using one of these methods:
 - Click the **Online Bill Pay** icon
 - Click the **Make a Payment** link beside the **Online Bill Pay** icon.
 - Click the **Online Bill Pay** link in the side or top menu.
2. On the Online Bill Pay page, select your preferred provider's location, if more than one selection is available.
3. Type your patient account number, which should be located on your paper statement. If your provider does not currently assign patient account numbers, use either the last 4 digits of your social security number or your full telephone number.
4. Type the full or partial amount that you want to pay, for example "50" for \$50.00 and "134.85" for \$134.85.
5. Select either a credit card or "Add New Card" from the **Available Credit Cards** drop-down menu.
 1. *To update your current credit card information*, select a current card, click the **Edit selected credit card button**, and make the appropriate changes.
 2. *To delete a credit card that you no longer want to use*, select a current card, click the **Delete selected credit card button**, and click **OK** to confirm the deletion. You will need to add a new credit card, as described in the next bullet.
 3. *To use a card that is not listed*, select "Add New Card" and provide the required information in all fields. **Note:** The CVV code is the 3-digit number on the back of your credit card.
6. Click the **Click Here to Pay Your Bill Now** button. The page refreshes.
7. Verify the payment information, and then click the **Submit Payment** button. If you need to make any changes, click the **Change Information** button, make your changes, and then click the **Submit Payment** button. The page refreshes and displays a thank you message that includes your payment amount, date, and confirmation number. You will receive e-mail that includes these same details. However, if you would like a printed confirmation as well, click the **Click here for printable version** link, and then click **OK** on the printer dialog box to send the confirmation message to your printer.

Related topics: [View My Payment History](#) and [View My eStatements](#)

View My Payment History

Use this feature to view your payment history for services such as Ask a Doctor, Virtual Office Visit, and Prescription Renewal if they are offered by your provider, and if your provider chooses to charge a fee.

1. On the My Patient Page, click the **Payment History** link beside the **Online Bill Pay** icon. The date, time, amount, and type of payment display in the payment history table.
 - "Patient Payment" is a payment that you made in the Patient Portal.
 - "Practice Payment" is a payment that was made for you by the provider when you gave the provider your payment information either in person or by telephone.
2. If you are signed up for recurring payments with this practice (e.g., a budget payment plan), the payment start date and payment amount per pay period (e.g., every 30 days) display in the budget payment plan history table. **Note:** If the practice charges a processing fee for each payment, this fee will **not** display in your payment history.
3. To view a specific payment, select a payment row. The page refreshes and displays details about the payment. Click the **Click here to go back** link to return to the payment history table.
4. To make a payment, click the **Pay My Bill Now** link. For more information, see [Make an Online Bill Payment](#).

Related topic: [View My eStatements](#)

View My eStatements

Use this feature to view your eStatements, that is, your electronic billing statements for services such as Ask a Doctor, Virtual Office Visit, and Prescription Renewal if they are offered by your provider, and if your provider chooses to charge a fee.

1. On the My Patient Page, click the **eStatements** link beside the **Online Bill Pay** icon.
2. On the **Current eStatements** tab, to view a specific payment, select a payment row.
3. On the **Out of Date eStatements** tab, to view a specific payment, select a payment row.
4. To make a payment, click the **Pay My Bill Now** link. For more information, see [Make an Online Bill Payment](#).

Related topic: [View My Payment History](#)

Personal Health Record

Use this feature to record your personal health history information, including your demographic, emergency contact, medical, and doctor visit information. The Personal Health Record (PHR) is like a personal health journal and is completely separate from the official medical record that is kept by your provider.

Note: You are not required to fill out any information on any page. However, since the PHR is provided to help you track your health history, plan to update it periodically so that it remains up-to-date.

1. On the My Patient Page, navigate to the Personal Health Record feature using one of these methods:
 - o Click the **Personal Health Record** icon
 - o Click the **View** link beside the **Personal Health Record** icon.
 - o Click the **Personal Health Record** link in the side or top menu, if one is provided.
2. On the Personal Health Record page, review the descriptive information about the PHR.
3. Go to the next step (step 4) if you are setting up a new PHR, or go to step 5 if you are updating a PHR that you have already started or completed.
4. To start a new PHR, click the **Create PHR step-by-step** link under the **New Users** heading. The page is directed to the first page of the PHR, "My Information." A gray bar at the top of the form tracks your progress, and a green square indicates which page you are working on as you progress.
 1. Review the information that you provided during the online registration process. You may add, delete, or update any field as long as there is valid information in all of the required fields.
 2. Click the **NEXT>>** button to navigate to the next page in the form. If you need to return to a previous page, click the **<<PREV** button.
 3. Continue to fill out each page of the form, and then navigate to the next page. Depending on the page contents, you may add multiple items to lists, such as your current medications, click multiple check boxes to indicate your family's health history, and type comments in your health diary, if desired. Click the **Save [contents]** or **Add [contents]** button to save or add your information on each page, as appropriate.
 4. Click the **Edit** or **Delete** button to modify or delete the information on a page, as appropriate.
 5. Click the **Printable Version** link to save and print a wallet card that displays a summary of your health information, if desired.
 6. Select the sections that you would like to display on the PHR Summary View, or click the **Select All Sections** button, and then click the **View PHR Summary** button. Click the **Printable Version** button to save and print a page-sized copy of the PHR summary, if desired.
 7. On the last page, click the **Notify** button to let your doctor know that you have completed a PHR, even if you have not finished adding information to every section.
 8. Click the **NEXT>>** button to return to the Personal Health Record page.
5. To update an existing PHR, select a section link under the **Returning Users** heading. Each section page displays an overview of the pages on which you can add or edit the current PHR information for that section.
6. From an overview page, you can navigate the PHR using the strategy that is most appropriate for you:
 1. *To update the contents on a specific page in a section*, click an **Add/Edit** link. For example, click **Update My Health Information > Add/Edit** to navigate to the My Immunizations page.
 2. *To navigate to the first page of a section*, click the **Use Step-By-Step to enter information** link at the top of an overview page. From here, click the **NEXT>>** button to navigate to each subsequent page.
 3. *To navigate to the next section of the PHR*, click the **Skip to [section name]** button.
 4. Follow the instructions for completing a PHR that are described above for new users.

Note: At any time, you may exit the PHR by clicking the **My Patient Page** link on the menu bar. However, before you exit, be sure that you have saved the added or updated information on each page. This will

ensure that your personal health record reflects the most up-to-date information.

Related topic: [Complete My Registration Form](#)

Fill Out Custom Health Forms

Use this feature to fill out your provider's custom health forms.

Note: Your provider may require you to fill out a preregistration form when you create an online account in the Patient Portal.

1. On the My Patient Page, navigate to the Custom Health Forms page using one of these methods:
 - Click the **Custom Forms** icon
 - Click the **Fill Out Forms** link beside the **Custom Forms** icon.
 - Click the **Health Forms** link in the side or top menu.
2. On the Health Forms page, select your preferred location, if more than one selection is available, and then click the **Select Location** button.
3. Select a form from the **Published Forms** list. For example, if your provider requires a preregistration form for a new online account, select this form. If you have already begun filling out the preregistration form, the date when you last worked on the form displays. Click the **View as PDF** link to open, save, and print the form as an Acrobat document.
4. On multi-page forms, provide the required information, and click the **Submit and Continue** button at the bottom of each page. A progress bar across the top of each page tracks your progress.
5. When you have completed a form, click the **Submit** button to save and submit the form to your provider. The page refreshes and displays a thank you message. Click the form name link to open, save, and print the form as an Acrobat document.

Related topic: [Complete My Registration Form](#)

Complete My Registration Form

Fill out a registration form either as part of the online account creation process or later at the request of your provider. This form enables your provider to collect your basic demographic and health information and saves you time when you come in for your appointment. Follow the instructions in [Fill Out Custom Health Forms](#).

Note: Your provider may require you to fill out a preregistration form when you create an online account in the Patient Portal. If this is the case, you will not be able to use any of the Patient Portal features until you have submitted the form.