

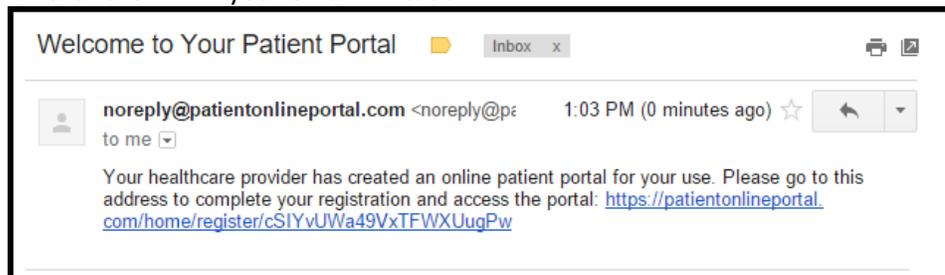
Premium Patient Portal Instructions

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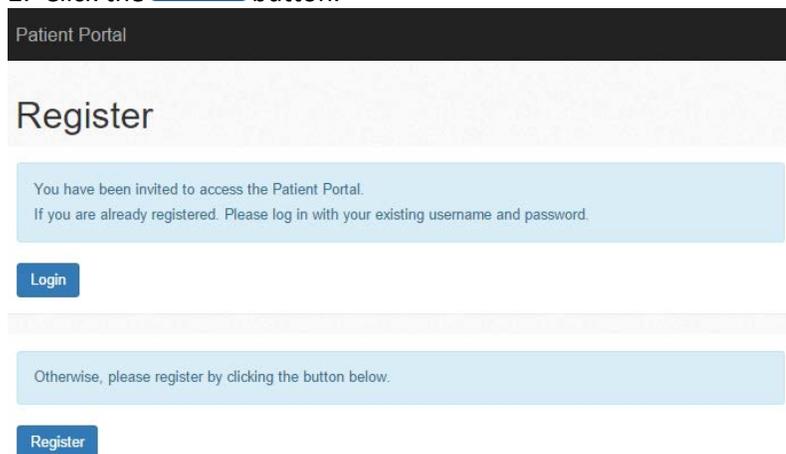
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Registration Process

1. Click the link in your email invitation.



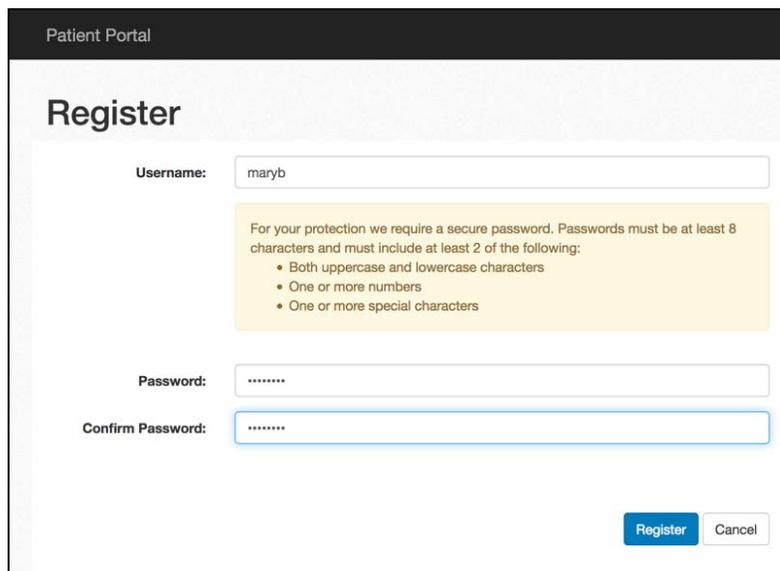
2. Click the  button.



3. Fill out the registration form.

Note that your password must be a minimum of eight characters and have at least two of the following: numeric, uppercase, special characters.

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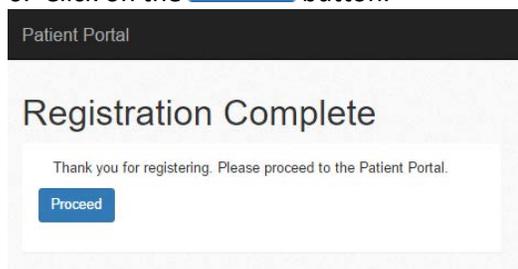
The screenshot shows the 'Patient Portal' header and a 'Register' form. The 'Username' field contains 'maryb'. A yellow box provides password requirements: 'For your protection we require a secure password. Passwords must be at least 8 characters and must include at least 2 of the following: • Both uppercase and lowercase characters • One or more numbers • One or more special characters'. The 'Password' and 'Confirm Password' fields are masked with dots. 'Register' and 'Cancel' buttons are at the bottom right.

4. Once completed, click the  button.

5. This message will appear in the bottom right of the web browser indicating that registration was successful.

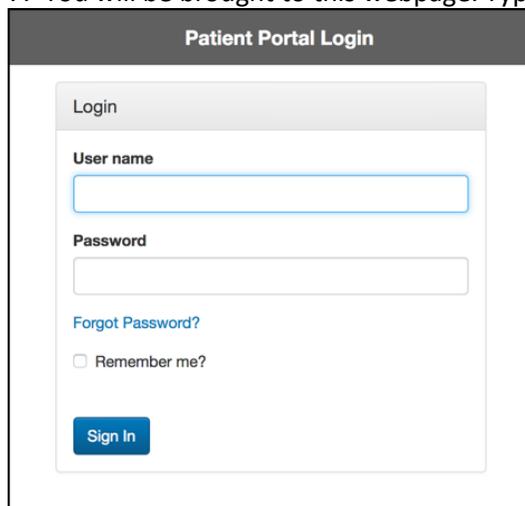


6. Click on the  button.



The screenshot shows the 'Patient Portal' header and a 'Registration Complete' message. The text reads: 'Thank you for registering. Please proceed to the Patient Portal.' A 'Proceed' button is located below the message.

7. You will be brought to this webpage. Type in User name and Password. Click the  button.

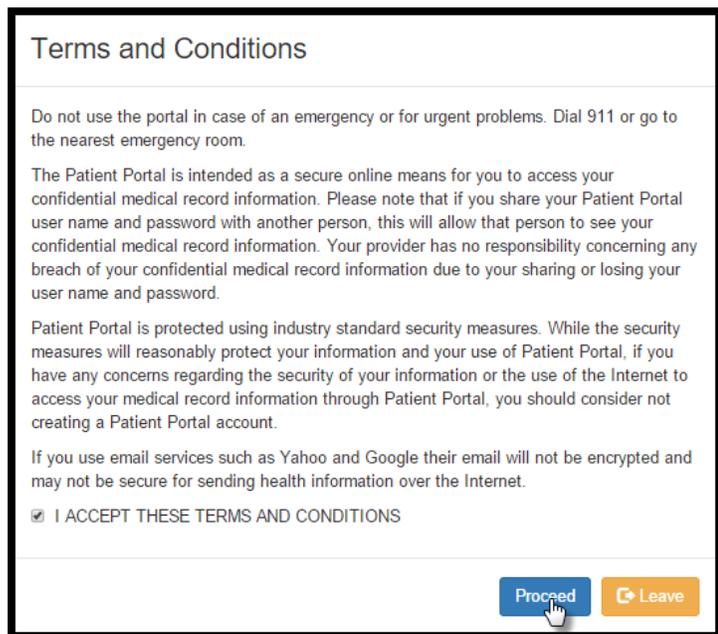


The screenshot shows the 'Patient Portal Login' page. It features a 'Login' section with a 'User name' field, a 'Password' field, a 'Forgot Password?' link, and a 'Remember me?' checkbox. A 'Sign In' button is at the bottom left.

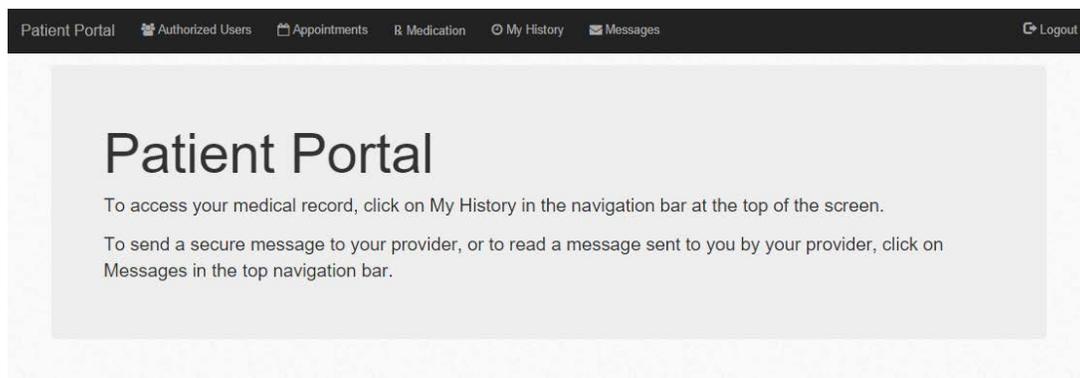
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8. After clicking  for the first time, you will be presented with the portal's Terms and Conditions (see screenshot on the following page). Please read this information, click the checkbox to indicate your acceptance, and then click the  button.

Note: *If you have forgotten your password, you can reset it by clicking on the [Forgot Password?](#) link on the Patient Portal login page or you can contact your provider's office. They can also reset your portal password for you.*



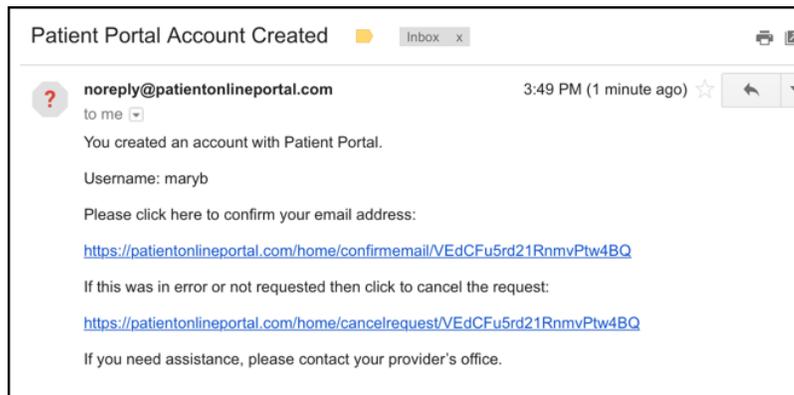
9. After clicking the  button, you will be at the portal's main screen. From here, you can create authorized users, see appointments, medication, access your medical history, or send secure messages to your provider.



Extremely Important: Failure to confirm your email address may result in loss of your patient portal access.

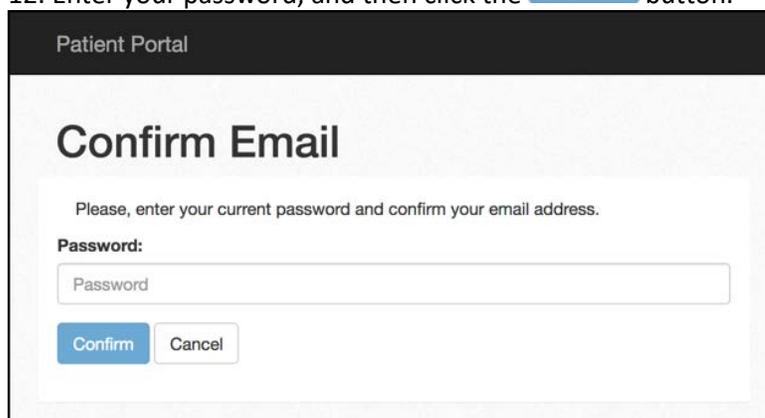
You will receive an email like this:

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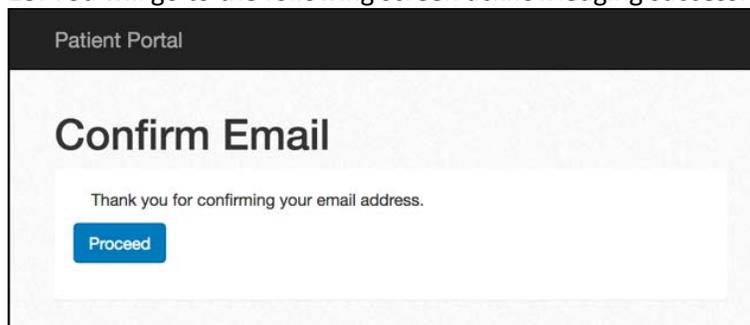


11. Click the link to confirm your email address.

12. Enter your password, and then click the  button.

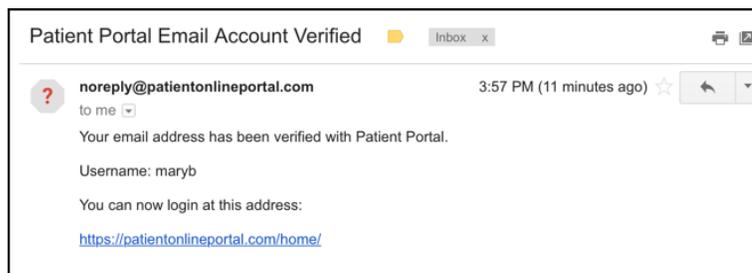


13. You will go to the following screen acknowledging successful confirmation of email address.



You will also receive an email verifying the email.

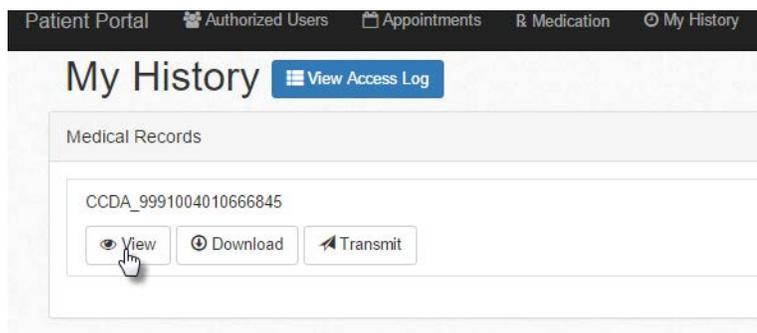
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14. Click the  button to return to the patient portal logon screen.

Medical History

1. To access your Medical History, click  in the black bar at the top of the screen. You will arrive at this screen:



2. To view your medical record, click the  button. A sample medical record is shown on the following page.

If you want to send your medical record to another provider, click the  button and enter the secure email address where you would like to send the information. *The email address must be one which uses the Direct protocol for transmission, otherwise your message will not be received by the provider (the email address must have the word "direct" in it after the @ sign).*

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Summarization of Episode Note

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

Document Id	4-2-035890800044-2969379-14095-263341517606490 97620e6f-534c-4e76-b76f-4308bcf08b7b		
Document Created:	January 13, 2016		

Performer	Joy MacLauren, QA		
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Author	Joy MacLauren		
Contact info	2525 S Downing St South Park, CO 80210-5817, US Tel: (303) 778-1955		

Document maintained by	South Park		
Contact info	Work Place: 2525 S Downing St South Park, CO 80210-5817, US Tel: (303) 778-1955		

MEDICATIONS

Medication	RxNorm Code	Start Date	End Date	Status
Lexapro	352273			Completed

PROBLEMS

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

ENCOUNTERS

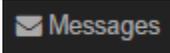
Date	Diagnosis
1/13/2016	o (F43.10) Post-traumatic stress disorder, unspecified(SNOMED:)

PROCEDURES

FUNCTIONAL STATUS

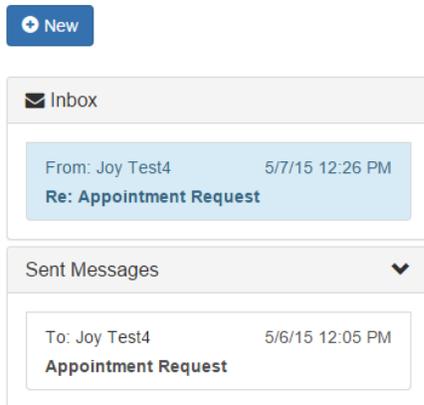
Functional Status
Exam: Examination of Ms. Doe reveals her to have no apparent serious mental status abnormalities. She is normal in appearance with age appropriate dress and grooming and she appears to be her stated age. Neither depression nor mood elevation is evident. Her speech is normal in rate,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

Messaging

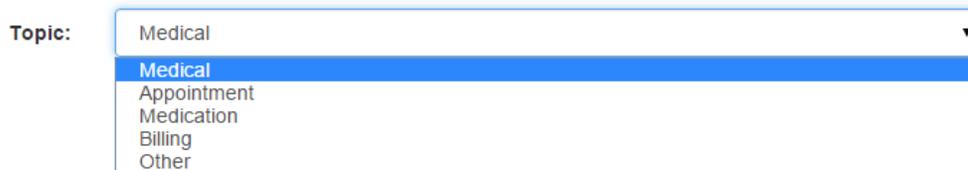
1. To send a secure message to your provider, click on  in the black bar at the top of the screen. Then click the  button.

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Messages

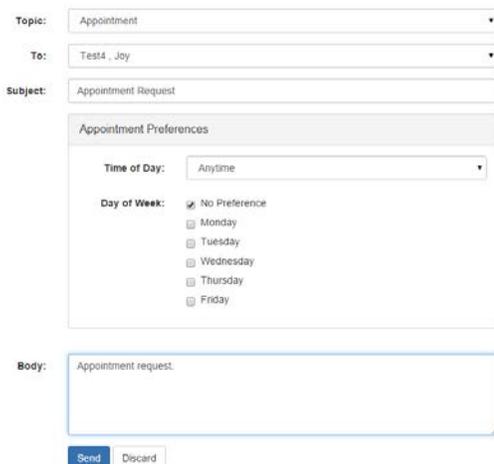


2. Select a topic using the dropdown arrow at the right of the Topic: field.



3. Select your provider's or practice administrator's name using the dropdown arrow at the right of the To: field. Enter a subject and body of the message and then click Send.

This is an example of an appointment request message:



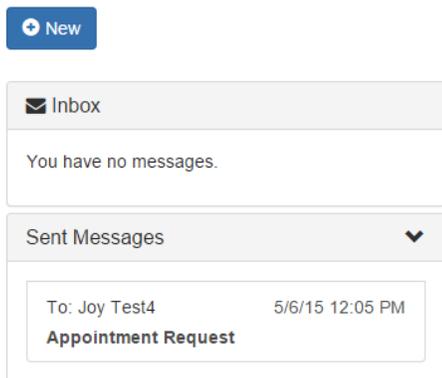
4. After clicking send, you will receive a notification in the bottom right corner notifying you that the message was sent successfully.

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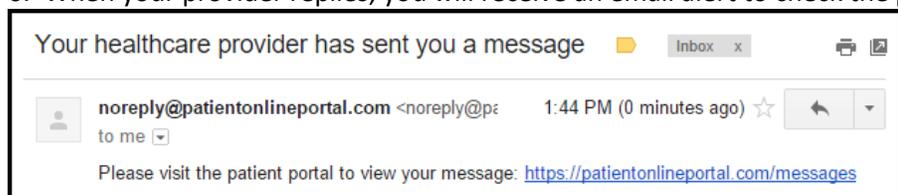


5. Your sent message will show under messages.

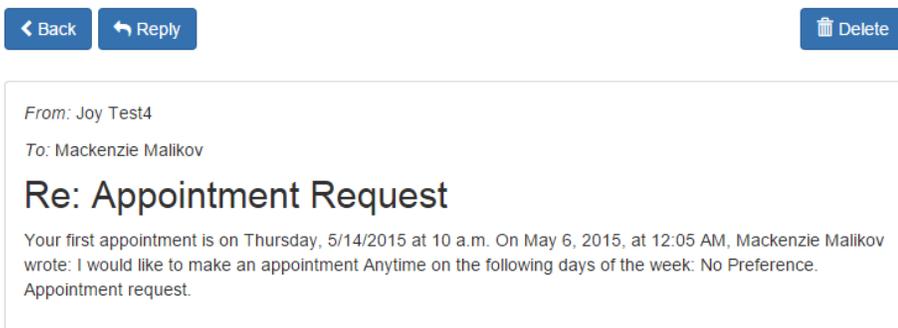
Messages



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

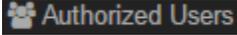


7. You can click the link and review the response from your provider.

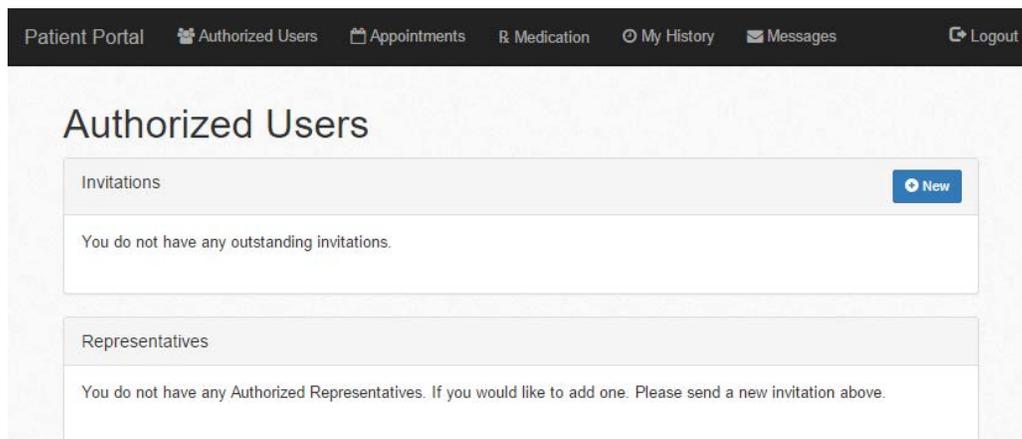


8. After reviewing the message, you may reply, delete, or go back to the main message window.

Authorized Users

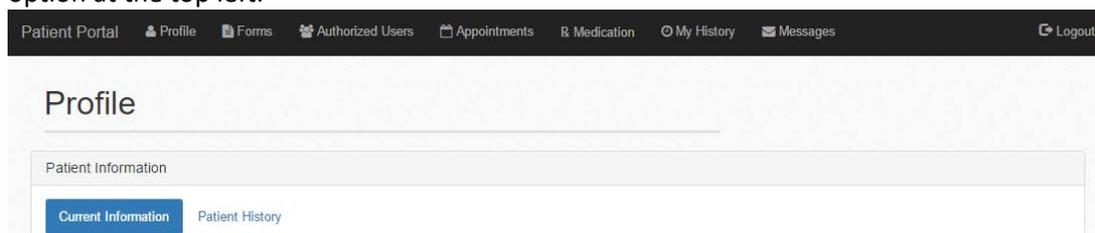
If you want to authorize someone else to access your portal account, click on  Authorized Users in the black bar at the top, then click  to send them an invitation to register.

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Profile

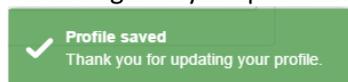
You have the ability to enter and make changes to demographic data on file at your provider's office. Click the Profile option at the top left.



Current Information

This will bring you to a list of fields that you can fill in to update your demographic information. Note: You will not be able to change your name.

After entering or changing your current information, click save. You will receive this message in the bottom right corner indicating that your profile was saved.



A message will be sent to your provider notifying him/her that you requested changes to your patient profile and the provider will be able to review and save any/all changes on your record.

Patient History

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

1. Start on the History of Present Illness tab by filling in all applicable areas.
2. Once you reach the bottom of the History of Present Illness tab, select  to save progress or click

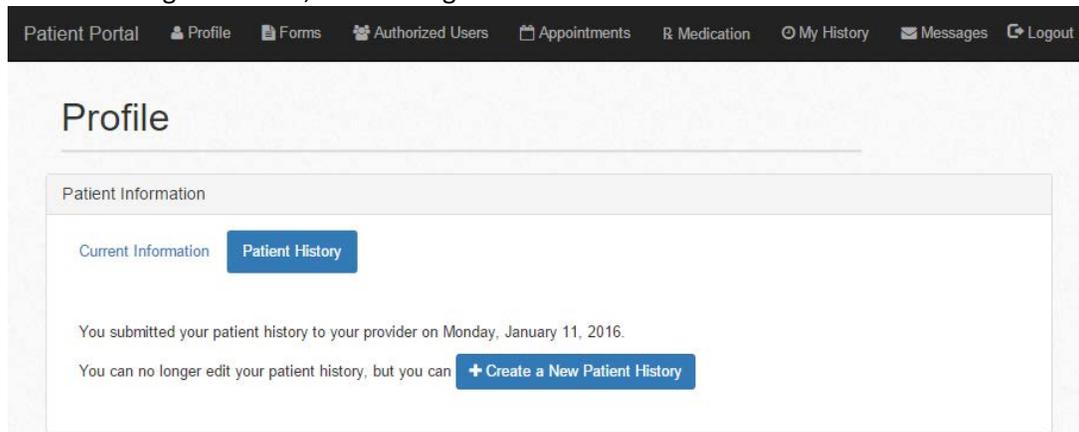
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 Continue

to go to the next tab. The  Back button will bring you back to the previous tab.

3. After you have completed all tabs, the Family History tab will have a  Submit button.

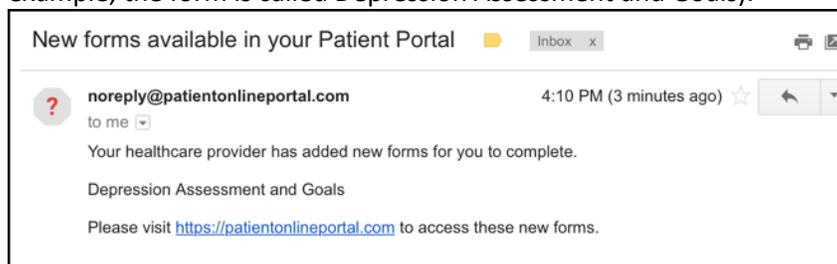
4. After being submitted, this message will show:



The screenshot shows the Patient Portal navigation bar with options: Patient Portal, Profile, Forms, Authorized Users, Appointments, Medication, My History, Messages, and Logout. The main content area is titled "Profile" and contains a "Patient Information" section. Within this section, there are two tabs: "Current Information" and "Patient History". The "Patient History" tab is active, displaying a message: "You submitted your patient history to your provider on Monday, January 11, 2016." Below this message is a button labeled "+ Create a New Patient History".

Forms

1. You may receive an email from your provider asking you to fill out a form (the form will be listed in the email – in this example, the form is called Depression Assessment and Goals).



The screenshot shows an email notification with the subject "New forms available in your Patient Portal". The sender is "noreply@patientonlineportal.com" and the time is "4:10 PM (3 minutes ago)". The email body contains the text: "Your healthcare provider has added new forms for you to complete. Depression Assessment and Goals. Please visit <https://patientonlineportal.com> to access these new forms."

2. Sign into your patient portal and go to  Forms from the black bar on the top.

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



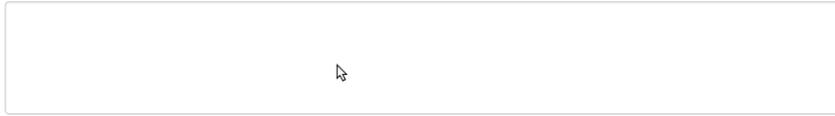
The screenshot shows the "Forms" section of the patient portal. On the left side, there is a list of forms: "Informed Consent for Assessment and Treatment", "Records Release Authorization", "The Patient Health Questionnaire (PHQ-9)", "Depression Assessment and Goals", and "Uploads/Downloads". The "Depression Assessment and Goals" form is highlighted with a red box. The main content area displays the "INFORMED CONSENT FOR ASSESSMENT AND TREATMENT" form, which includes fields for "Name" (Mary Bailey) and "Date of Birth" (07/21/1973). Below the form, there is a paragraph of text explaining the assessment process and a section for the patient to understand their rights and agree to the treatment.

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4. Fill out the form as instructed.

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

Please sign below using your mouse to confirm your answers.



6. Use your mouse to create your signature in the popup window.

Sign below



By selecting the "Authorized Signature" button, you are signing this form electronically. You agree your electronic signature is the legal equivalent of your manual signature on this form as if actually signed by you in writing. You also acknowledge no certification authority or other third party verification is necessary to validate this e-signature.

Clear signature

Cancel

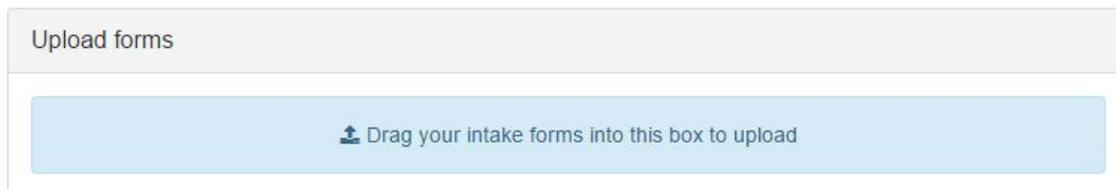
Authorize Signature

- **Cancel** button will close the window.
- **Clear signature** button will clear out the signature so you can try again.
- **Authorize Signature** button will confirm the signature and add to the form.

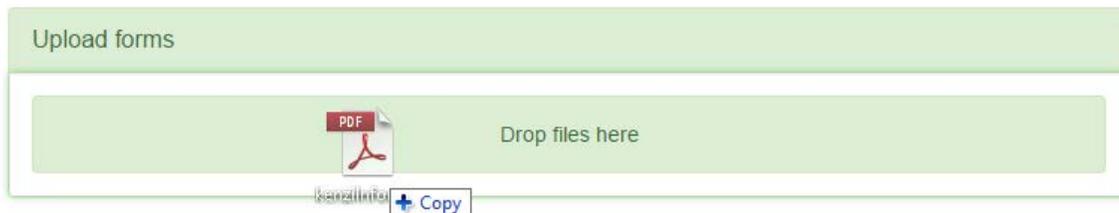
7. Once the form has been completed, click the **Complete** button on the bottom. If you start the form but need to finish it at a different time, click the **Save for later** button. You will be able to return at any time to finish.

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

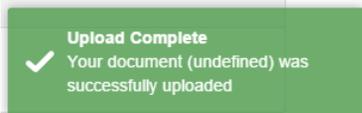
1. From the Forms page, go to **Uploads/Downloads** at the bottom of the left column.



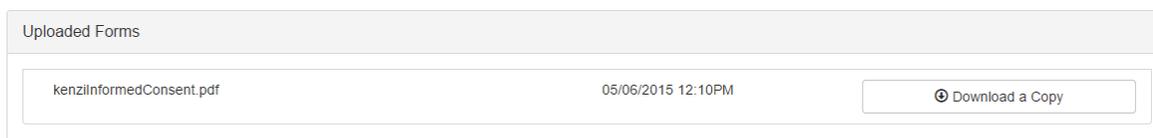
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After the file is uploaded, this message will appear on the bottom right notifying you that the upload is complete.

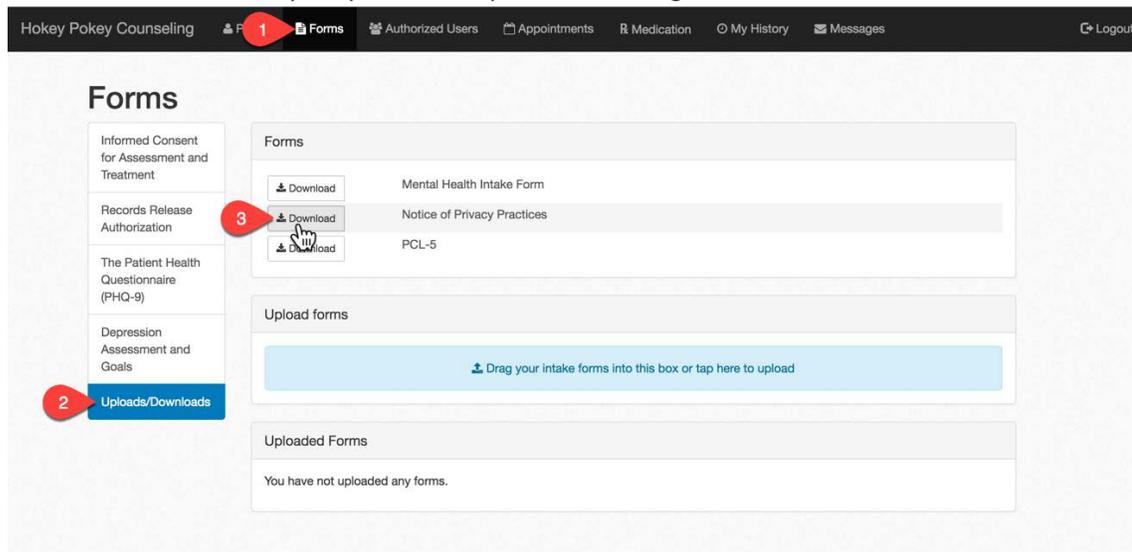


The uploaded forms area will now show the uploaded document, date, and time that it was uploaded.



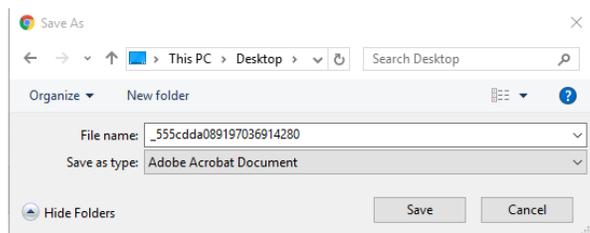
Signature Forms

1. On the top of the menu bar, select Forms.
2. Click the Uploads/Downloads link.
3. Select the form that your provider requested to be signed. Click Download.



4. When the 'Save As' Window pops up, you can either use the default name or change the file name. It is suggested to save the document to your desktop so it can be easily be located. Click Save.

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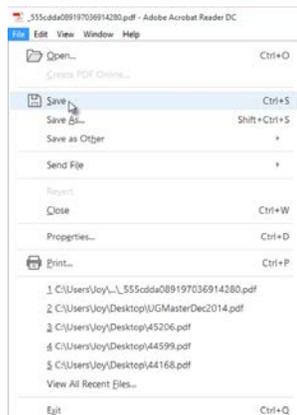


5. Open the document on your computer. If saved on your desktop, double click the icon to open.

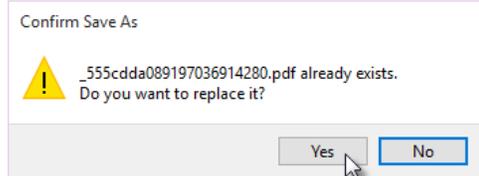


6. Complete the form as needed/instructed by your provider.

7. Click File and then Save to save the document.



8. If you receive the confirm save alert, you can click to overwrite the blank document or to change the name and create a new file.



9. Once the file is saved, you will need to upload the form back to the portal. Go back to the patient portal file web page (see steps 1 and 2). There are two ways to upload the document.

a. Drag the icon from your computer's desktop to the Uploads forms box on the web page.

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Upload forms



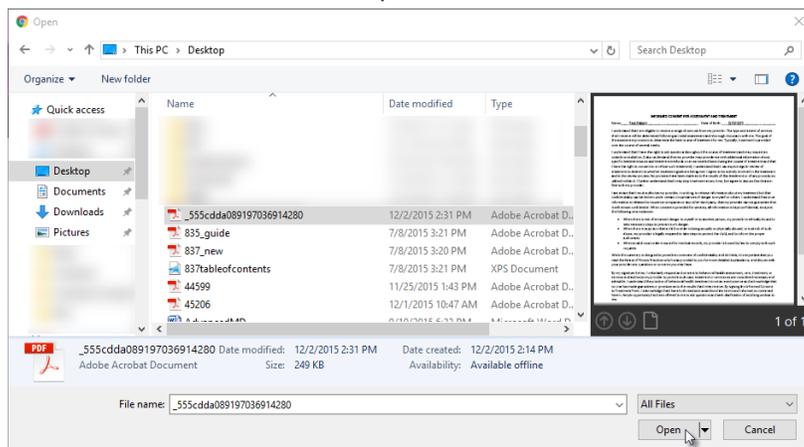
b. The second way that the form can be uploaded:

- Click within the Uploads form bar.

Upload forms

⬇️ Drag your intake forms into this box or tap here to upload

- Find the file and click Open.



- After the document has been uploaded, it is now ready to be signed. Click the  button.

Uploaded Forms



- This window will pop up.

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Sign below

By selecting the "Authorized Signature" button, you are signing this form electronically. You agree your electronic signature is the legal equivalent of your manual signature on this form as if actually signed by you in writing. You also acknowledge no certification authority or other third party verification is necessary to validate this e-signature.

- Use your mouse to sign your name. Click if you want to sign again or if you wish to sign later. Once you are satisfied with your signature, click the button.

Sign below

Test Patient

By selecting the "Authorized Signature" button, you are signing this form electronically. You agree your electronic signature is the legal equivalent of your manual signature on this form as if actually signed by you in writing. You also acknowledge no certification authority or other third party verification is necessary to validate this e-signature.

- After clicking the Authorize Signature button, this popup will show in the bottom right of the web page.



- The document is now signed and is available for your provider.