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Patient Portal Guide

1. **Supported browsers**
    ○ To use the Patient Portal, patients must use a computer or mobile device with one of these supported browsers:
        ■ Google Chrome
        ■ Microsoft Edge (for Windows 7, Windows 8/8.1, and Windows 10)
        ■ Mozilla Firefox
        ■ Safari (for Apple devices only)
    ○ Patients who attempt to use an unsupported browser (such as Internet Explorer) to access the Patient Portal receive a message with links to download a supported browser.

2. **To create a Patient Portal account from an email invitation or notification:**
    ○ Click the Patient Portal link in the email.
        ■ In a Patient Portal invitation email, the link is "**Create My Account**." In a lab result email, the link is "**View Results**."
        ■ The Create your new password page appears.
    ○ Confirm your email address and enter your password twice. After you review the Terms and Conditions and the Privacy Policy, check the box and click "**Create account**."
        ■ You will be prompted to select a security option to protect your account. This one-time setup enables you to confirm your identity in the future if you forget your password.
    ○ Select a security option and then click the "**Setup**" button below that option.
        ■ **Text me** (recommended) — Receive a verification code by text message.
        ■ **Call me** — Receive a verification code by phone call.
          Note: Select this option if you entered the number of a landline phone.
        ■ **Security Question** — Select a security question from a list of questions.
    ○ If you selected **Text me** or **Call me**:
        ■ Enter your phone number and then click "**Send code**" (for text message) or "**Call**" (for phone call). The verification code is sent to your phone.

- Enter the verification code you received by text message or phone call, and then click "**Verify**."
    - If you selected **Security Question**, select a question from the list, enter the answer, and then click **Save**.
    Note: If you enter any spaces or special characters (such as punctuation marks or underscores) in your answer, you will need to enter the same spaces and special characters in the future. The athenahealth account does not distinguish uppercase letters from lowercase letters.
    - If you set up a security question, or if you entered a recovery phone number that differs from the phone number in your patient record, you must verify access to the phone number on file with your healthcare provider.
    - If you initiated your Patient Portal registration from a lab result email or during the online check-in workflow, you may see the "Choose your patient relationship" page. This page asks whether you are the patient or another person (family member or guardian) who manages the patient's account.
        - Click "**I am <patient_name>**" or "**I manage <patient_name>'s account**."
        - If you click "**I manage <patient_name>'s account**," you must enter your name, email address, and date of birth. This information is associated with your athenahealth account.
        - Click Continue. A confirmation page appears.
    - On the confirmation page, click "**Continue**."

3. **To check in for an appointment online before you arrive at the office**
    - To check in online from the Patient Portal.
        - Patients can log in to the Patient Portal and check in for their appointments within 7 days of the appointment date.
        - Log in to the Patient Portal and find the appointment.
            - Your upcoming appointment appears on your home page and on the **Appointments** page.
            - Click "**Check in now**."
            - Confirm your appointment details (date, time, provider), enter any questions for your provider, and click "**Continue**."
            - Confirm or update your contact and personal information.
            - **Would you like to receive text alerts?** — This prompt appears only if you have not yet agreed to accept text

message notifications from the practice. Select **Yes** to receive text messages from the practice

- To add a pharmacy to your patient record:
    a. Scroll to the bottom of the page and click "**Add Pharmacy**."
       In the Select a Pharmacy window, search for and select the pharmacy.
    b. Click "**Save**."
       Note: You can store up to five pharmacies in your patient record, but only one can be designated as your primary pharmacy.
- Click "**Save and Continue**."

○ Pay your copay or outstanding balance.
- Select the charges to pay.
  Note: For outstanding balances, you can enter an amount smaller than the charge in the Payment box.
- Select your payment method.
  If you select "**Pay at the front desk**" or "**I have questions about my balance**," you can pay your balance at the time of your appointment.
- Click "**Continue**."
- If you selected "**Pay with a credit card**," a payment window appears.
    - Enter your credit card information, check the "**I'm not a robot**" box, and click "**Review Payment**."
    - Verify your credit card information and then click "**Submit Payment**."
      A message confirms that your payment was received.
    - Click "**Continue**."

○ Sign consent forms
- Click each form listed on the left side of the window to review it.
- To sign each form, enter your full name in the signature box at the bottom of the window and click "**Sign**."
  If you prefer to sign the form when you arrive at the practice, click "**Sign at the front desk**."
- Review each form in the list and either sign it or click "**Sign at the front desk**" to continue to the next step.
- After you review all the forms, click "**Continue**."

○ Complete health history form

- Review the summary of your health history form.
- For each section (Medications, Allergies, and so on), click "**Update**" to add, edit, or remove items, or click "**No Changes**."
- When you finish reviewing the health history, click "**Continue**." A message thanks you for completing online check-in.

4. **Patient Portal for mobile devices**
   - Patients can access the Patient Portal using a mobile device compatible with iOS and Safari (iPhones, iPads, etc.) or using an Android or Blackberry device. The URL is the same one used for your practice's Patient Portal. Patients whose preferred language is Spanish can tap "**Esp**" in the upper right corner of the screen to display information on the Patient Portal in Spanish.
   Note: The mobile version of the Patient Portal is not an app, but you can save the URL on the home screen of your smartphone.
   - With check-in using mobile, patients can read and authorize any practice-related forms using their mobile device prior to their actual appointment date. This feature reduces the time spent checking in on the appointment date for both your practice staff and patients.
   - The mobile version of the Patient Portal provides functionality similar to that of the desktop version:
     - Login page
     - Home page
     - Terms and Conditions
     - Privacy Policy
     - Standard appointment functionality (listing of past and future appointments, cancelling and rescheduling of appointments)
     - Inbox and message management
     - Billing
     - My Health (test results, medications, vaccinations, allergies, problems, and surgical procedures)
     - Medication refills
     - Communication with provider and practice
     - Mobile feedback
   - To register for the Patient Portal on a smartphone
     - When patients open a Patient Portal invitation email on their smartphone, a mobile-friendly workflow makes it easy to complete the registration process.

- To check in for an appointment using a smartphone before arriving at the office
    - Log in to the Patient Portal on your mobile device.
    - Tap "**Appointments**."
    - Tap "**Upcoming Appointments**."
    - "**Check-in Available**" appears next to any appointment that is available for online check-in.
    - Tap "**Check-in Available**."
    - Review the appointment information and tap "**Check In**."
    - Confirm your appointment details (date, time provider), enter any questions for your provider, and tap "**Continue**."
    - Confirm or update your contact and personal information.
    - To add a pharmacy to your patient record:
        - Scroll down and tap "**Add Pharmacy**."
          In the Select a Pharmacy window, search for and select the pharmacy.
        - Tap "**Save**."
          Note: You can store up to five pharmacies in your patient record, but only one can be designated as your primary pharmacy.
    - Tap "**Continue**."
    - Pay your copay or outstanding balance.
        - Select the charges to pay.
          Note: For outstanding balances, you can enter an amount smaller than the charge in the Payment box. You can also select "**pay at your appointment**."
        - Tap "**Continue**."
        - Select your payment method (credit card only).
          You can select any credit card displayed on this page, or you can select "**Pay with a different card**."
        - If you have no credit card on file with the practice, or if you selected "**Pay with a different card**," a payment window appears. Enter your credit card information and check the "**I'm not a robot**" box.
        - Tap "**Review Payment**."
        - Verify your payment information and tap "**Submit Payment**."
          A message confirms that your payment was received.
    - Complete consent forms or health history form.

- Tap a form
- To sign the form, enter your full name in the signature box and tap "**Sign**." If you prefer to sign the form when you arrive at the practice, tap "**Sign at the front desk**."
- Review each form on your mobile device and either sign it or tap "**Sign at the front desk**" to continue to the next step.
- Tap "**Continue**," and the Health History Form step appears.
- Review each section of your health history form.
- For each section (Medications, Allergies, and so on), tap "**Update**" or "**Add**" to update the section, or tap "**No Changes**." If you make changes in a section, tap "**Save**."
- If you tap "**No Changes**" in every health history section, a message appears:

Confirm Health History

You have not updated certain sections of this form.

Would you like to submit those sections as having "No Changes"?

Go Back   Yes

- To make changes, tap "**Go Back**." Otherwise, tap "**Yes**."
- When you finish reviewing the health history, tap "**Continue**."

5. **Other features and workflows**
   ○ Using the Patient Portal, patients can:
      ■ Update personal information.
      ■ Exchange secure messages with providers.
      ■ Make appointments.
      ■ View upcoming appointments and appointment ticklers.
      ■ View past medications, past allergies, and past problems.
      ■ Preview and download their health record.
      ■ Transmit their health data to from the Patient Portal to other providers.
      ■ Fill out forms.

- Retrieve test results. The results appear on the Patient Portal in a document that the patient can view, download, or transmit.
- View account statements.
- Pay balances.