Patien Portal
Users Guide

Version 7.2.1

How to Use the Patient Portal
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What is the Patient Portal?

The Patient Portal is a web-based system that serves as a secure communication link between you and the clinic. When you log in to the Portal with your private user name and password, you can see information that is pulled from your electronic record at the clinic and displayed on the web page.

After logging in to the Portal, you can:

• View your health summary information.
• View results of lab and other diagnostic tests.
• Request a referral.
• Print or save an electronic copy of your Health Summary or last office visit using the standard record and document formats.

Apple Valley Medical Clinic will send you a notification e-mail whenever you receive a message in the Patient Portal. This e-mail only lets you know you have received a new message on the Portal and provides a link to access the Portal.
The Patient Portal Home Page

When Apple Valley Medical Clinic creates a Patient Portal account for you, a message will be sent to the e-mail address you provided to the clinic. The message will contain the URL (Internet address) for Apple Valley Medical Clinic's Patient Portal.

To access the clinic's Patient Portal:
1. Open a web browser.
2. Type the clinic's Patient Portal URL in the address field of the browser.
3. Press the Enter key.
   The Portal home should be displayed in your browser.

When you access Apple Valley Medical Clinic's Patient Portal, notice that there is a Menu Bar located on the Home page. From the Menu Bar, you can get directions to the clinic, request an appointment, or log in to the Portal.

Before you can access your personal information through the Portal, you must log in using the user name and password provided in the e-mail mentioned above, or get directions to the clinic before you log in.

To get directions to the clinic:
1. In the Menu Bar of the Portal home page, type your street address in the fields provided.
2. Click Get Directions. This function opens a link to Yahoo! Maps™. You can print the resulting maps and driving directions.

To log in to Portal:
1. Click on the Login link in the Menu Bar. The Login window displays.
2. Enter your Portal user name and password in the fields provided.
3. Click the **Login** button.

After you log in, it is good practice to change your password and add a security question for your Portal account. (Instructions for updating your Portal account password are included in this user guide.) Note that when you change your Portal password, the system sends a message to the e-mail account that you provided to the clinic. The message is simply a notification of a change to your account and does not include any password information.
Introducing the Portal Interface

Although Apple Valley Medical Clinic’s Portal may have a different appearance and may not include all the items shown here, the general layout and functionality will be similar.

Click a **navigation tab** to access the information indicated by the label on the tab. Note that a number is displayed next to the label on the **Messages** and **Lab/Test Results** tabs. This number tells you how many new (unread) messages or test results you have.

The **font size controls** enable you to increase or decrease the size of the text in the Portal window.

When you log in to the Patient Portal, the **Overview** tab is selected by default. On the **Overview** tab, notice the **Actions** section and the **My Information** links. The **Actions** section provides quick access to most Portal functions, and you can click on the links in **My Information** to access the tab containing the information indicated.

Functions and information available on each tab are explained in subsequent parts of this documentation.
Communicating through the Portal

The Portal provides a convenient communication link between you and Apple Valley Medical Clinic. Communications Apple Valley Medical Clinic might send through the Portal include lab and test results, responses to requests you submitted through the Portal, or general announcements sent to all Portal patients.

You can view all communications from the clinic through your Portal Inbox on the Messages tab. Attachments may be included with communications sent by the clinic.

Receiving Your Lab or Test Results from the Clinic
When the clinic sends a message containing lab or test results through the Patient Portal, you may access the message in several places.

When the message first arrives, it will be in the My Recent Messages and My Recent Results sections on the Overview tab.

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

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

Note: If you delete a message from any of these locations, the message will be deleted from all of the locations.
The clinic may send test results as an attachment (a file attached to the message). Some attachments can be viewed in the message window of the Portal, but some may require a different program (such as a word processor) in order to open them.

To view lab or test results:
1. Click the title of the message.

The messages containing lab or test results may include message attachments. An attachment is indicated by the paperclip icon appearing to the left of the message date. In this example, results were sent as three attachments.

2. To view these results, click the title of the attachment.

When you click the attachment title, results are displayed (unless the attachment is a file type that requires a program that is not available on your computer and that cannot be displayed in the Portal). Shown here are Chemistry lab results. Results displayed in red text indicate out-of-normal range for that result.

3. To print the message, click the printer icon in the toolbar of your browser, or right-click the message and select Print from the pop-up menu.

4. To save the message to your computer, click the File menu and select Save As.
**Viewing Your Last Visit Summary**

When you visit Apple Valley Medical Clinic, a summary of the visit is prepared in CCD format and is sent to your Portal account (if you currently have an account on record).

When the message first arrives, it will be in the **My Recent Messages** section on the **Overview** tab and on the **Messages** tab in the **Inbox** section with all other messages.

**To view your visit summary:**

1. Click the title of the message to list the attachments.

2. Click the title of the attachment to view the Visit Summary.

3. To print the attachment (Visit Summary), click the printer icon in the toolbar of your browser.

4. To save the Visit Summary to your computer, click the **File** menu and select **Save As**.

**Requesting a Physician Referral**

Some clinics allow patients to request physician referrals through the Patient Portal. If Apple Valley Medical Clinic uses this feature, and you choose to use the Portal to request a referral to a specialist, you will need to indicate the type of specialist you need and the name of the specialist (if known) when you submit this request.

**To request a physician referral:**

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

2. In the **Actions** section of the **Messages** tab, click **Request Referral**. The Referral Request form displays.
3. Type the reason you are requesting the referral and provide the name of the specialist (if known).

4. To indicate the type of specialist desired, click the down-arrow to the right of the Specialty field, and then select a specialty from the drop-down list.

5. Provide the name of your insurance company in the field provided, and then click the Submit button to send the request to Apple Valley Medical Clinic.

**Note:** One staff member is assigned to receive all the referral requests submitted through the Portal, so there is no option to select the person to whom the request will be sent.

**Viewing Your Information through the Portal**

The Portal allows you to view general health information documented in your records at the clinic. General health information that you can view includes:

- A list of your medications
- Your documented allergies
- A list of your health problems
- Your medical history
- Your immunizations

You can also view your insurance information and demographic information, such as your address and phone number.

*Be aware that new information submitted through the Portal is routed to a member of clinic staff and not directly into your records. Clinic staff will review the new information and determine whether it is appropriate to add the information to your records. The new information will not be visible in the Portal until the clinic staff updates your records. Display of the patient SSN in the Continuity of Care Record (CCR) has been removed.*
To view a list of your medications documented by Apple Valley Medical Clinic:
1. Click the Medications tab.
2. In the My Medications section, click Current Medications to view a list of your current medications as documented in your chart at the clinic.

3. To view medications that you have taken previously, but are no longer taking, click Past Medications.

To access your Health Summary Information:
1. On the main Portal screen, click the Health Summary tab.
   On the Health Summary tab, the Health Summary section contains links to your health information.

2. Click on the links in the Health Summary section to display details. (Note that clicking on the Medications link will access the Medications tab.)
3. Click the Problems link to display a list of current medical problems recorded in your chart.
4. Click the Allergies link to display all current allergies recorded in your chart.
5. Click Medical History to display a summary of the history contained in your chart.
6. Click Immunizations to display immunizations documented by Apple Valley Medical Clinic.

Notice that links to View Health Summary or Export Health Summary are also included in the Health Summary section. See "Viewing, Printing, or Saving Your Health Summary" for information about these links.
Your Portal enables you to view your Health Summary, which contains a snapshot of the health information currently documented in your electronic medical record at your doctor’s office. You can print a copy of your Health Summary, or you can save (export) a copy to your computer.

You may want to take a copy of your Health Summary with you if you go to see another doctor. This will enable the new doctor to have detailed information about your health history and to review all medications that you are currently taking before prescribing new medications. This promotes Continuity of Care Records (CCR) handling between providers and is especially useful in avoiding potentially dangerous medication interactions.

**To view, print, or save your Health Summary:**

1. On the main Portal screen, click the **Health Summary** tab.

2. To view your Health Summary, in the left panel of the **Health Summary** tab, click **View Chart Summary**. A second-level list appears. Select one of the following options:
   - **View Chart Summary (CCR)** to open the Chart Summary in CCR format, without confidential information.
   - **View Confidential Chart Summary (CCR)** to open the Health Summary in CCR format with confidential information included.

3. To print a section of your Health Summary:
   a. Click a summary section folder in the left panel (**Medications**, **Problems**, **Allergies**, **Medical History**, or **Immunizations**). The selected section appears.
Note: If no entries appear in a summary section, the section cannot be saved and printed.

b. In the Actions section of the left panel, click Save to File.

c. When the File Download window opens, click Open to view the resulting .pdf file.

OR

Click Save to specify a location for saving the resulting .pdf file on your computer. You can then open the file to view and print the output.

d. Click the Adobe reader print icon to print the summary on an available printer.

4. To export an electronic copy of your Health Summary: in the left panel of the Health Summary tab, click Export Chart Summary. A second-level list appears. Select one of the following:

OE Export Chart Summary (CCR) to export the Health Summary in CCR format, without confidential information.
Export Confidential Chart Summary (CCR) to export the Health Summary in CCR format with confidential information included.

**Caution:** If you select Confidential CCR, the Information exported will include any confidential information recorded in your chart. If you do not want to include the confidential information, select CCR instead.

After saving the Health Summary file to your computer, you can attach that file to an e-mail message if you need to send it to another physician electronically. CCR files are recognized standards that some medical practices may be able to import directly into their electronic medical record if they use an electronic record system.

**To view or update your demographics information:**
1. Click the My Account icon in the upper right corner of the main Portal screen. The My Account main screen is displayed.
2. To view your demographic information, click My Demographics.
3. To update your demographic information, click Edit My Demographics.
4. Type the new information in the appropriate fields.
5. Click Submit Changes. The new information will be routed to Apple Valley Medical Clinic for review, and then added to your records if appropriate. The new information will not be visible in the Portal until the clinic staff updates your records.

**To view or update your insurance information:**
1. Click the My Account icon in the upper-right corner of the main Portal screen. The My Account main screen is displayed.
2. Click the My Demographics link, and scroll down to Edit My Insurance.
3. To update information about your insurance provider, type the information in the fields provided in the Edit My Insurance section.
4. If you have changed health insurance providers, scroll down the Edit My Demographics window to the Add New Insurance section. Enter the requested information, then click the Add Insurance button.
5. To submit demographic changes to the clinic, click Submit Changes.

**Note:** Edited information will not be reflected in your records until approved by the clinic.

**To update your Portal account password or e-mail address:**
You can view and update your Portal account information (Examples: password, e-mail address) from within the Portal. It is strongly recommended that you change your password immediately after you receive the initial notification that your account has been set up and on a regular basis thereafter.
1. To update your Portal account information, click the **My Account** icon in the upper-right corner of the main Portal screen. The My Account main screen is displayed.

2. To change your password or other information related to accessing your account, click **My Account Maintenance**.

   ![Account Maintenance](image)

3. Type the updated information in the fields provided, and then click **Submit Change**.

   **Note:** The Security Question and Security Answer are used if you forget your password.
If you forget your password...

You can reset your password from the login area. Notice the text Did you forget your password located immediately below the Login button. You can click on this text to access your security question and reset your password.

If you did not set up a security question and answer, then you can contact the clinic to reset your password. No one at the clinic knows your password, but they can reset it if necessary, and then you will be able to create a new password.

To reset your password:

1. In the Login area, click the text Did you forget your password?

The Password Retrieval window displays.

2. In the Password Retrieval window, type your e-mail address and login name, and then click Submit Info.

   The system displays the Secure Question you entered in Account Maintenance.

3. Type the Security Answer you entered in Account Maintenance, and then click Submit Answer.