Oracle® Health Patient Portal Cloud Service

User Guide

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Oracle Health Patient Portal Cloud Service User Guide,

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Contents

Preface

This preface contains the following sections:

- Diversity and Inclusion
- Documentation Accessibility

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

1 About Oracle Health Patient Portal Cloud Service

Depending on your organization and account type, Oracle Health Patient Portal Cloud Service (Patient Portal) allows you to access information on your health records.

For example, you may see options to do some or all of the following:

- View your health record
- Download and share your entire health record or individual health record encounters
- Schedule, reschedule, and cancel appointments
- Send and receive provider messages
- Add appointments to a list of favorites and book favorite completed appointments again
- Schedule a return visit with your provider

- Home Dashboard
  The Patient Portal Home dashboard is automatically displayed after you log in. The dashboard includes a welcome message and indicates whose dashboard you are viewing. You can also see an overview of upcoming appointments, unread messages, and latest activity for you or the current person you are viewing.
- Next Appointments
  On the Home dashboard, the Next Appointments section indicates the number of upcoming appointments. This section includes cards for the next two upcoming appointments for you (or the patient in context) with details about the time, date, and provider.
- Unread Messages
  On the Home dashboard, the Upcoming Messages section indicates the number of unread messages. This section includes the two most recent unread message, if any, sent to you (or the patient in context) by the provider or care team. Each message includes details about the time, date, and sender.
- Latest Activity
  On the Home dashboard, the Latest Activity section provides information about the latest test results, medications, and health conditions for you (or the patient in context). Each type of activity includes the date of the most recent activity.
- Main Menu
  The main menu is displayed at the bottom of most Patient Portal pages.
- Profile (Switch User) Menu
  The Profile (Switch User) menu is available from the top row header on every page of Patient Portal.
- Site Map and Search
  You can ask questions through the Ask Oracle chat to locate information in Patient Portal.
- View Terms of Use and Privacy Policy
  You can access the details on the Terms of User and the Privacy Policy for Patient Portal at any time. This information can change depending on the requirements of your organization and country.

- Access Help
  If you need to contact an administrator or find more information, you can find it through Help in Patient Portal.

Home Dashboard

The Patient Portal Home dashboard is automatically displayed after you log in. The dashboard includes a welcome message and indicates whose dashboard you are viewing. You can also see an overview of upcoming appointments, unread messages, and latest activity for you or the current person you are viewing.

> **Note:**
>
> The dashboard includes information only for the currently selected person. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the dashboard to display information for the selected person.

You can return to the Home dashboard anytime by selecting **Home** on the main menu.

Next Appointments

On the Home dashboard, the Next Appointments section indicates the number of upcoming appointments. This section includes cards for the next two upcoming appointments for you (or the patient in context) with details about the time, date, and provider.

You can select:

- An appointment card to open the appointment's details in full-page view with more information about the appointment
- Any linked phone number to call the number using the default calling feature on your device
- Any linked address to open the default maps feature on your device

Depending on the type of appointment and the current time and date, you might see options to reschedule or cancel the appointment, register, or check in. See the Appointments Dashboard topic for more information about available actions.

See Appointments for more information.

Unread Messages

On the Home dashboard, the Upcoming Messages section indicates the number of unread messages. This section includes the two most recent unread message, if any, sent to you (or the patient in context) by the provider or care team. Each message includes details about the time, date, and sender.

You can:

- Select a message to open the relevant conversation in full-page view

- Select More Actions to see a list of available actions depending on the type of appointment and current date.

See Messages for more information.

Latest Activity

On the Home dashboard, the Latest Activity section provides information about the latest test results, medications, and health conditions for you (or the patient in context). Each type of activity includes the date of the most recent activity.

> **Note:**
>
> Depending on your organization's settings, Health Conditions might be known alternatively as Diagnoses, Health Issues, Problems, or a similar name. Depending on your organization and account settings, some activity might not be displayed or might have a delay. See the Viewing Health History topic for more information.

Select **View** to display the relevant Health Record page for that specific item (for example, if you select **View** for a test result, the Health Record opens to the Test Results page where you can view all of the test results).

See Health Records for more information.

Main Menu

The main menu is displayed at the bottom of most Patient Portal pages.

The main menu includes the following buttons:

- : Home dashboard
- : Appointments dashboard
- : Health Record dashboard
- : Messages dashboard
- : Ask Oracle (site map and page search

The Home dashboard is displayed when you sign in. Select a button to view a different dashboard or menu.

Profile (Switch User) Menu

The Profile (Switch User) menu is available from the top row header on every page of Patient Portal.

The profile lets you view highlighted profile information for the patient in context.

You can also use this menu to:

- **Profile**: View and update your profile, including:
  - Demographics: Review and update personal details.
  - Insurance: Add or update up to three insurance information and responsible parties.
  - Care team: See details about your primary care provider. This information is read-only and added by your care team
  - Emergency Contacts: Update your list of emergency contacts. You have up to three emergency contacts listed.
- **Send Record**: View and send all or part of a health record with a provider.
- **Download Record**: View and download all or parts of a health record to your device as a Continuity of Care Document (CCD) in .PDF or .XML format.
- **Settings**: View and update your account settings, including:
  - Account: Manage the settings for your account. You can change your display language or password and review your organization's Terms of Use and privacy policy.
  - Access Logs: View a list of actions performed by you or your authorized representative in the health record.
- **Help**: View your organization's contact information and Help files.
- **Sign Out**: End your current Patient Portal session.

If you are an authorized representative with access to other connected accounts, you can also use the User (Switch User) menu to switch your view to those other accounts.

> **Note:**
>
> The ability to view content for each account depends on the confidentiality and sensitivity restrictions set by your organization.

See Accounts and Profiles for more information about viewing and updating your profile and account settings.

See Health Records for more information about viewing and sending a health record.

Site Map and Search

You can ask questions through the Ask Oracle chat to locate information in Patient Portal.

From the dashboard, select **Ask Oracle**

to display the Ask Oracle site map and page search.

> **Note:**
>
> If you are an authorized representative managing someone else's account, this page displays only the sections available to that account.

The following pages are included in the site map and are searchable by key word:

- Appointments
- Schedule Appointment
- Messaging
- Health Record
- Visit Summaries
- Clinical Notes
- Vital Signs
- Test Results
- Medications
- Allergies
- Immunizations
- Health Conditions
- Procedures
- Profile
- Demographics
- Emergency Contact
- Insurance
- Care Team
- Settings
- Account Management
- Access Logs
- Help

You can select the **close (X)** button in the lower-right corner of the page to return to the previous page you were on.

View Terms of Use and Privacy Policy

You can access the details on the Terms of User and the Privacy Policy for Patient Portal at any time. This information can change depending on the requirements of your organization and country.

To access the Terms of Use and Privacy Policy of your Patient Portal:

1. From the User (Switch Profile) menu, select **Settings**.
2. Select **Account**. You are redirected to the Account tab on the Settings page.

3. Select the appropriate option to be redirected to a web page that provides you with the Terms of Use or Privacy Policy information for your organization.

Access Help

If you need to contact an administrator or find more information, you can find it through Help in Patient Portal.

To access Help information:

1. From the Profile (Switch User) menu, select **Settings**.
2. Select **Help**. Contact information and resources are displayed.

2 Accounts and Profiles

To start using Patient Portal, you must create an account (username and password). You can also set a preferred language, update your account at any time, and add profile and personal information.

- Create a Patient Portal Account after Registering
  If you have previously had an in-person visit, you can create a Patient Portal account as part of your next visit registration.
- Create a Password for a New Account
  As part of enrolling in Patient Portal, you create a password for your account. You use this password every time you sign in.
- Change a Password
  You can change your password anytime from the Settings page.
- Recover a Forgotten Password
  If you forgot your password, you can reset it after you verify your identity. Passwords are changed from the sign-in page.
- Sign Out
  Sign when you are done using the portal to protect the security of your account and personal details. Logging out is especially important if you are using a shared computer.
- Switch the Language
  Depending on your Patient Portal settings, it may use a language that you do not want. But, you can change it to accommodate your needs.
- Switch Accounts as an Authorized Representative
  The authorized representative (also known as a proxy user) is commonly the caretaker or guardian of the patient and has the authority to carry out health-related tasks on behalf of the patient. Authorized representatives can have multiple connected accounts, including one for themselves.
- Request Removal of an Authorized Representative Connection
  It is the responsibility of the authorized representative to inform their provider immediately of any legal authority changes or when the connection of another account needs to be removed.
- View Access Logs
  The access log displays a list of actions (called events) performed by you or your authorized representative in the health record.
- Update Account Settings
  You can update your account settings anytime.
- Profiles and Personal Information
  You can access your profile from the User (Switch Profile) menu or the Ask Oracle menu.

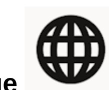
Create a Patient Portal Account after Registering

If you have previously had an in-person visit, you can create a Patient Portal account as part of your next visit registration.

After you register using the link that was emailed to you, you are offered an option to enroll. Enrolling in the patient portal lets you access your patient record and the services available to you (or to the patient you manage as an authorized representative).

- During the registration process you identify yourself.
- If you choose to create an account after you register, you enter your username (or email address) and set your password.
- Once enrolled, you can sign in to your patient portal account for the first time.

To enroll in Patient Portal after you register:

1. On the confirmation page of the registration process, select **Create Account**.
2. Optionally, change the language: Select **Language**  and then select the language you want. The enrollment page is updated to that language.
3. Enter your preferred username and select **Verify**. (You can use your email address as your username.)
4. The system searches for your patient record. If the system finds your patient record, a confirmation page is displayed and an email is sent your email address.
5. Access the email sent to you and use it to create a new password. See Create a Password for a New Account for more information.
6. After you create a password, return to the sign-in page to sign in to the Patient Portal.

Create a Password for a New Account

As part of enrolling in Patient Portal, you create a password for your account. You use this password every time you sign in.

To create a password while creating a new Patient Portal account:

1. Access the email sent to you after you have verified your account and set your username. (Email messages might be located in your Spam folder. Be sure to also add the organization to your safe senders list.)
2. Select **Create Password** in the email. The Create Password page is displayed in your browser.
3. Enter a password in the Enter Password box. Each organization has different rules for the length and characters required in a password. See the password policy information on the Set Password page for password requirements.
4. Enter the same password in the Verify Password box.
5. Select **Continue**. The Account Successfully Created page is displayed. You are now ready to sign in to the patient portal using your new password.
6. Select **Sign In**. The Sign In page is displayed.

7. Sign in using your username and password. The Home dashboard is displayed.

Change a Password

You can change your password anytime from the Settings page.

To change your password:

1. From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
2. Under Password, select **Reset Password**. The Reset Password page is displayed.
3. Enter your current password in the Current Password box.
4. Enter a new password in the Enter Password box that meets your organization's requirements.

> **Note:**
>
> Each organization has different rules for the length and characters required in a password. See the password policy information on the Reset Password page for password requirements.

5. Confirm the new password in the Confirm Password box.
6. Select **Reset**. Your password is reset and a confirmation message is displayed.
7. Follow the steps to recover a forgotten password. See Recover a Forgotten Password for more information.

Recover a Forgotten Password

If you forgot your password, you can reset it after you verify your identity. Passwords are changed from the sign-in page.

To recover your password:

1. Access the sign-in page and select **Forgot password** under the Password box. The Forgot Password page is displayed.
2. Enter your username and select **Next**. A confirmation message is displayed. If the username you entered is associated with a registered account, a message is sent to that email address with instructions about how to reset your password. (Your username might be the same as your email.)
3. Find and open your email and select the link for the reset password process. (Email messages might be located in your Spam folder. Be sure to also add the organization to your safe senders list.)
4. Select **Reset Password** in the email. The Reset Password page is displayed.
5. Enter a new password that meets your organization's requirements.

> **Note:**
>
> Each organization has different rules for the length and characters required in a password. See the password policy information on the Reset Password page for password requirements.

6. Enter the same password in the Confirm Password box.
7. Select **Continue** to continue to the Sign In page.
8. On the Sign In page, enter your username and new password to sign in.

Sign Out

Sign when you are done using the portal to protect the security of your account and personal details. Logging out is especially important if you are using a shared computer.

> **Note:**
>
> The patient portal automatically logs you out after approximately 15 minutes of inactivity.

To sign out:

1. From the Home dashboard, select the **User (Switch Profile)** menu.
2. Select Sign Out to sign out and return to the Sign In page.

Switch the Language

Depending on your Patient Portal settings, it may use a language that you do not want. But, you can change it to accommodate your needs.

You can set the language Patient Portal uses by selecting Language from the Sign-in page. You can also change the language anytime from the Profile (Switch User) menu.

To switch the current language:

1. From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
2. Select **Account** (if it is not already selected). The Account tab is displayed.
3. Select the drop-down list under **Display Language**. A list of each language available to you is displayed. Select your preferred language. The patient portal refreshes to display all content in the selected language.

Switch the language before signing in to Patient Portal to ensure that the portal is displayed in that language each time you sign in.

Switch Accounts as an Authorized Representative

The authorized representative (also known as a proxy user) is commonly the caretaker or guardian of the patient and has the authority to carry out health-related tasks on behalf of the patient. Authorized representatives can have multiple connected accounts, including one for themselves.

> **Note:**
>
> Ask your provider if you want to add or remove a connected account.

If you are an authorized representative connected to multiple accounts, you can switch accounts on the User (Switch Profile) page:

To switch accounts as an authorized representative:

1. After you sign in, open the User (Switch Profile) menu and select **Switch User**.
2. Select another account to switch your view to that account. Your view of Patient Portal is updated to display only information for the selected patient. You can change the profile, schedule appointments, and complete patient portal activities as if you are that patient.
3. When you are ready to return to your own account, select **Switch User** from the Profile (Switch User) account and select your own account again.

    > **Note:**
    >
    > If you sign out while viewing another account, the next time you sign in you are returned to your own account. Select the user's account on the User (Switch Profile) page to return to that other account.

Authorized representatives generally have all of the same capabilities as the patient, themselves, with exception to information with sensitivity restrictions. Depending on the confidentiality and sensitivity restrictions applied from set by your organization and the age of the patient, you may be unable to view some health record information. See the Viewing Sensitive Health Record History topic for more information.

Request Removal of an Authorized Representative Connection

It is the responsibility of the authorized representative to inform their provider immediately of any legal authority changes or when the connection of another account needs to be removed.

Contact your provider or care team if you want to remove your account's connection to another account.

> **Note:**
>
> You can use the Messaging feature to send your provider a message that requests changes to confidentiality, but your care team might require you to prove your identity in person.

Once a connection is removed, the authorized representative is unable to access the other account or its information.

View Access Logs

The access log displays a list of actions (called events) performed by you or your authorized representative in the health record.

Access log details can include:

- Who the record was accessed by (self or authorized representative)
- What action was taken, such as:
  - Signed in
  - Viewed
  - Modified
  - Removed or deleted
  - Downloaded
  - Printed
  - Sent
- The time the action was taken
- The type of information being accessed, such as:
  - Allergies
  - Clinical Notes
  - Health Conditions
  - Immunizations
  - Medications
  - Procedures
  - Reports
  - Test Results
  - Visit Summaries

Additionally, the Search bar lets you search the access logs by key word.

> **Note:**
>
> Your organization might mark certain types of test results or vital signs as Sensitive. Sensitive information cannot be viewed by authorized representatives of protected minors. See the Access Sensitive Health Record Details topic for more information.

To view the Access Logs for an account:

1. From the User (Switch Profile) menu, select **Settings**.
2. Select **Access Logs**. The Access Logs tab is displayed.

> **Note:**
>
> This page includes information only for the currently selected account. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the page to display information for the selected person.

Update Account Settings

You can update your account settings anytime.

To update your account settings:

1. From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
2. Select **Account** (if it is not already selected). The Account tab is displayed.
3. In the Display Language section, optionally select the language list to switch the current language.
4. In the Password section, optionally select **Reset Password** to change your password.
5. In the Legal section, optionally, select the download links for **Terms of Use** or **Privacy Policy** to view your organization's Terms of Use and privacy policies.

See About Oracle Health Patient Portal Cloud Service for information and steps for each type of setting.

Profiles and Personal Information

You can access your profile from the User (Switch Profile) menu or the Ask Oracle menu.

You can view the following information in your profile:

- Demographics
- Responsible party
- Insurance
- Care team
- Emergency contacts

See the topics in this guide for information about viewing, adding, and editing each of these items.

- Add a Profile Picture
  You can add (or edit) your photo to your profile in Patient Portal to personalize your application.
- Edit Demographics (Personal Details)
  You can view and edit personal details (also called demographics) from the User (Switch Profile) page and also when you register or check in to an appointment. You might be unable to edit some details because your organization requires you to prove your identity.
- Add Financially Responsible Party
  The responsible party (also called a guarantor) is the person who is responsible for paying for any health visits. This person might be yourself or an authorized representative.

- Add Insurance
  You can save time at your appointments by adding your insurance information (up to three).
- Add Primary Care Provider
  If you do not yet have a primary care provider selected, contact your care team to update your account to add one.
- Add Emergency Contact
  You can add an emergency contact to ensure that healthcare workers know who to contact if you need support or cannot speak for yourself.

Add a Profile Picture

You can add (or edit) your photo to your profile in Patient Portal to personalize your application.

To access the Terms of Use and Privacy Policy of your Patient Portal:

1. From the Profile (Switch User) menu, select **Settings**.
2. Select your profile picture.
3. From your device, find and select an image to upload your profile picture from your desktop (if you are on a desktop computer) or from your photo gallery (if you are on a mobile device).
4. Follow any onscreen steps to take or upload a photo. Files must be a JPG or PNG file with a maximum size of 100 MB.

Edit Demographics (Personal Details)

You can view and edit personal details (also called demographics) from the User (Switch Profile) page and also when you register or check in to an appointment. You might be unable to edit some details because your organization requires you to prove your identity.

Identity proofing is a process in which a trained agent (for example, front desk staff) collects and verifies information to prove that a patient is who they say they are. This step is typically performed for all new patients and again when the patient requests changes to key personal details, such as a name, date of birth, or email address. Your organization might have its own rules about how often you need to prove your identity and what types of information require it.

If your details are read-only, you can request these updates when you visit the office in person.

To manually add or edit personal details (as available to you):

1. From the User (Switch Profile) drop-down list, select **Profile**.
2. Scroll to the Demographics section. This section displays the information originally entered during the enrollment process.
3. Select **Edit** to edit personal details such as: Title and suffix, marital status, birth sex, race and ethnicity, preferred language, personal email address, address, and phone numbers.
4. When you are done making changes, select **Save**.

Add Financially Responsible Party

The responsible party (also called a guarantor) is the person who is responsible for paying for any health visits. This person might be yourself or an authorized representative.

You can add or edit the details for the financially responsible party, including the relationship to patient, and your insurance, secondary insurance, and policyholder information.

To add or edit your responsible party:

1. From the User (Switch Profile) menu, select **Profile**.
2. Scroll to the Financial section.
3. In the Responsible Party section, select **Add Responsible Party** to add a responsible party. Alternatively, select **Edit** or **Remove** from the More Actions menu to edit or remove an existing responsible party.
4. Add or update the responsible party's details including first name, last name, date of birth, relationship to the patient, and phone number.
5. Optionally, enter additional details such as the title, address, and any other relevant details. The information you enter is always stored securely and safely.
6. When you are finished updating the responsible party, select **Save**.

Add Insurance

You can save time at your appointments by adding your insurance information (up to three).

To add or edit your insurance information:

1. From the User (Switch Profile) menu, select **Profile**.
2. Scroll to the Financial section.
3. In the Insurance section, select **Add Insurance** to add an insurance carrier. (You can have up to three insurance carriers.) Alternatively, select **Edit** or **Remove** from the More Actions menu to edit or remove an existing insurance carrier.
4. Add or update the insurance carrier's details.
5. Optionally, scan your insurance card's bar code or take or upload a photo of your insurance card if no bar code is available or readable. Alternatively, select **Enter Manually** to manually enter the insurance information.
6. Enter any missing details as needed. (If the card's bar code was readable, the insurance information is filled in for you.)
7. When you are finished adding updating insurance, select **Save**.

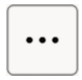
Add Primary Care Provider

If you do not yet have a primary care provider selected, contact your care team to update your account to add one.

Add Emergency Contact

You can add an emergency contact to ensure that healthcare workers know who to contact if you need support or cannot speak for yourself.

To add or edit your emergency contacts:

1. From the User (Switch Profile) menu, scroll to the Relationships section.
2. In the Emergency Contact section, select **Add Emergency Contact** to add an emergency contact. (You can have up to three emergency contacts.) Alternatively, select **Edit** or **Remove** from the More Actions  menu to edit or remove an existing emergency contact.
3. When complete, select **Save**.

3
Appointment Registration and Check In

Patient Portal notifies you when to register for your scheduled appointment (up to three days before the appointment). When you arrive for your appointment, you can check in up to 30 minutes before the appointment.

- Register for an Appointment
  The registration process lets you to complete the patient intake process before your appointment.
- Check In for an Appointment
  Depending on your organization and account settings, you might receive an email or text message alert to remind you when it is time to check in.

Register for an Appointment

The registration process lets you to complete the patient intake process before your appointment.

Depending on your organization and account settings, you might receive an email or text message alert to remind you when it is time to register for an appointment. Additionally, the appointment card on the Home dashboard might include a Register button.

> **Note:**
>
> Registration is available only during the registration period, which is three days before the scheduled appointment until 30 minutes before the appointment starts, at which time the check-in period starts. (You can complete registration details as part of the check-in process.). For example, if your appointment is scheduled for 12:30 p.m., you can register until 12:00 p.m. After 12:00 p.m., you need to complete the check-in process to complete any missing registration details.

To register for your appointment during the registration period:

1. Start the registration workflow using one of these methods:
   - If you already have an account, log in to the patient portal. From the Home dashboard or Appointments dashboard, select **Register** on an appointment card. (This button is available only if you are within the registration period.) The appointment card opens into the full appointment details where you can review details about the appointment, including its date, time, and type of visit.
   - If you do not yet have an account but you were given an invitation to register or a unique link, follow the instructions provided to start the registration process. You might need to enter your first name, last name, and date of birth to verify your identity.

> **Note:**
>
> Invitations and links are set to expire after a set number of days. If your invitation or link has expired, contact your provider's office or care team to request a new one.

2. Select **Start** to begin the guided steps.

   > **Note:**
   >
   > During the registration process, select **Back** from the Options ••• menu any time you want to return to a previous step. Select **Complete Later** for any step that you want to skip and complete later. (You cannot skip any steps in the registration process if you are registering as part of the check-in process.)

3. **Appointment:** If your appointment details are displayed, review the details.
   a. Optionally, select **Modify Appointment** to make any changes. Select one of the following options:
      - **Reschedule Appointment:** Make changes the details of the appointment, such as the date, time, or provider.

        > **Note:**
        >
        > Depending on the changes you make, you might be unable to register for the appointment if you select a new date or time that is not within the registration window, which is up to 3 days before the appointment and up to 15 minutes after the appointment starts.

      - **Cancel Appointment:** Send a notification to your organization that cancels the appointment. When you're ready, select Next to go to the next step.

   b. When you're ready, select **Next** to go to the next step.
4. **ID:** Provide your ID:
   a. If you do not yet have an ID on file or you want to add a new one:
      - Select one of the following options: **Driver License**, **State-issued Identification Card**, or **Passport**. Alternatively, select **I Don't Have One** or **Complete Later** to completely skip this step.
      - Use your device to take a photo or upload an image of the ID. Files should be a .JPG or .PNG file with a maximum size of 100 MB.

   b. Once you have ID on file, review the ID and make any changes.
   c. When you are ready, select **Continue** to go to the next step.
5. **Demographics:** Enter your demographics (personal details):

> **Note:**
>
> First Name, Last Name, and Date of Birth are read only. Contact your provider's office or care team if you need updates to this information.

   a. Enter any missing details, including your phone number, address, birth sex, race, and ethnicity.
   b. Select **Continue** to go to the next step.

6. **Emergency contacts:** Enter your emergency contact relationships:
   a. If you do not have an emergency contact on file or you want to add a new one:
      - Select **Add Emergency Contact** to add emergency contacts. Alternatively, select **No Emergency Contacts** to skip this step.
      - Enter the name, relationship, and phone number for the contact.
      - Optionally, also enter the contact's date of birth and address.
      - Select **Save**.
   b. Once you have emergency contacts on file, review the list of contacts.
   c. You can add up to three (total) emergency contacts.
   d. Optionally, use the options in the More Actions menu to make any changes:
      - If you have two or more entries, select **Move Up** or **Move Down** to reorder the list.
      - Select **Edit** to make any changes to a person's contact details.
      - Select **Remove** to remove a person from your list of contacts.
   e. Select **Save** to save any changes.
   f. Select **Continue** to go to the next step.
7. **Insurance:** Enter your insurance information:
   a. If you not not yet have insurance on file, or you want to add a new one:
      - Select **Add insurance** to scan your insurance card's bar code or take or upload a photo of your insurance card if no bar code is available or readable. Alternatively select **I Don't Have One** to skip this step.
      - Alternatively, select **Enter Manually** to enter this information manually. The Add Insurance page is displayed.
      - Enter any missing details as needed. (If the card's bar code was readable, the insurance information is filled in for you.)
      - Select **Save**.
   b. You can add up to three (total) insurance carriers.
   c. Once you have insurance on file, review your insurance details.
   d. Optionally, use the options in the More Actions menu to make any changes:
      - If you have two or more entries, select **Move Up** or **Move Down** to reorder the list. (This order indicates the primary, secondary, and tertiary insurance carriers. Your care team uses this order when submitting claims.)

- Select **Edit** to edit the details.
- Select **Delete** to delete an insurance carrier.

e. Select **Continue.**

8. Financial: Enter a responsible party. The responsible party (also called guarantor) is the person who is responsible for paying for any provider visits. This person might be yourself or an authorized representative.

   a. If you do not yet have a responsible party on file, or you want to add a new one:
      - Select **Add Responsible Party**.
      - Add the responsible party's details first name, last name, date of birth, relationship to the patient, and phone number.
      - Optionally, enter additional details such as the title, Social Security number, address, and any other relevant details. The information you enter is always stored securely and safely.
      - Optionally, select **Other Contact Method** to add an additional contact method.
      - Select **Save**.

   b. Once you have a responsible party on file, review the responsible party information.

   c. Optionally, use the options in the More Actions ... menu to make any changes:
      - If you have two or more entries, select **Move Up** or **Move Down** to reorder the list.
      - Select **Edit** to edit a person's details.
      - Select **Remove** to remove a person as a responsible party.

   d. When you are ready, select **Continue** to go to the next step.

9. Depending on your account and organization, you might have additional forms to complete or be asked to finalize your enrollment as part of this process. See the Manage accounts and Profiles topic for more information.

When your appointment is ready for check-in, you can proceed to the check-in process by selecting Check In from the dashboard card or appointment details. See Check In for an Appointment for more information.

Check In for an Appointment

Depending on your organization and account settings, you might receive an email or text message alert to remind you when it is time to check in.

Appointment cards on the Home dashboard and Appointments dashboard include a Check In button. If the registration process is not completed yet, a notification indicates that your details are missing.

> **Note:**
>
> Check-in becomes available 30 minutes before an appointment starts and ends 15 minutes after the appointment's scheduled start time. For example, if an appointment is scheduled for 12:30 p.m., the check-in window would be 12:00 p.m. to 12:45 p.m.

- You cannot check in earlier than this time frame.
- Do not start the check-in steps until you are physically present at the office.
- If you arrive later than 15 minutes late, your appointment might be marked as Missed.
- If you were unable to complete any registration details before the check-in period starts, you can complete them during the check-in process.

When you are ready to check in and if you are physically present at the office, complete the check-in steps:

1. Select **Check In** on the reminder email or dashboard. The Check-In page is displayed.
2. Complete each step of the check-in process.
3. Select **Yes** on the confirmation dialog box. A message is displayed that confirms you are now checked in.
4. If you have not yet completed registration, select **Complete Registration** to display the registration guided process and confirm and complete those details.

   > **Note:**
   >
   > You cannot skip steps in the registration process if you are registering as part of the check-in process.

5. When complete, select **Save**.

4

Messages

Patient Portal includes options for you to view, write, reply, and forward messages. You can also add attachments (files or photos) to messages.

- View the Messages Dashboard
  The Messages dashboard lets you view messages sent to you by your connected healthcare providers such as instructions, answers to questions, and information about your care. You might also have the ability to send new messages.
- View Message Details
  To view a message, from the Messages dashboard, select a message. The message opens as an ongoing conversation (also called a message thread) between you and the provider (or care team). Conversations with unread messages are indicated by a blue dot to the left of the message.
- Write New Messages
  Depending on your organization and type of account, Patient Portal might include the ability to send messages to your providers.
- Reply to Messages
  If you can send messages to providers through Patient Portal, you can reply to them.
- Forward Messages
  You can forward a message that you received to another provider.
- Add Attachments
  If your Patient Portal privileges include the message option, you can add up to five files in PNG, JPG, GIF, DOC, or XLS file format with a size of 50 MB or smaller as an attachment.

View the Messages Dashboard

The Messages dashboard lets you view messages sent to you by your connected healthcare providers such as instructions, answers to questions, and information about your care. You might also have the ability to send new messages.

To access the Messages dashboard, select **Messages** on the main menu.

> **Note:**
>
> The dashboard includes information only for the currently selected person. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the dashboard to display information for the selected person.

The Messages dashboard includes these pages:

- **Inbox**: List of conversations. Conversations with unread messages are indicated by blue dot next to the message. The Home dashboard displays the most recent two unread messages.
- **Sent Items**: List of previous conversations. Select a conversation to see its details and messages.
- **Trash:** List of messages removed from the invox. These messages are not deleted, but they are removed to keep the inbox more organized.

From the dashboard, the following actions might be available to you:

- **Write message**: Select **Write Message** or **New Message** to start a new conversation. See Write New Messages for more information.
- **Read message:** Open a conversation in the list to view its messages. Messages with attachments are indicated by an Attachments icon.
- **Mark as Read:** Mark a message as read. Conversations with unread messages are indicated by a blue dot to the left of the message.

After you open a message, the following actions might be available to you:

- **Reply**: Enter a reply to an existing message. See Reply to Messages for more information.
- **Forward**: Open the Forward Message window. See Forward Messages for more information.
- **Download File**: Select Download File to save to your device any attachment that was sent to you.

To return to the application, select Home on the main menu. You are returned to the Home dashboard.

View Message Details

To view a message, from the Messages dashboard, select a message. The message opens as an ongoing conversation (also called a message thread) between you and the provider (or care team). Conversations with unread messages are indicated by a blue dot to the left of the message.

You can view a list of unread messages by selecting the Unread Messages link on the Home dashboard.

You can view message details such as:

- Subject
- Sender
- Date and time received
- Any additional message options (replying, forwarding, deleting)
- Status (read or unread)

Write New Messages

Depending on your organization and type of account, Patient Portal might include the ability to send messages to your providers.

To write and send messages to your provider or care team (depending on your privileges):

1. From the Messages dashboard , select **Write Message**.
2. Select the **Recipient** drop-down list. Search for and select the person you want to send the message to.
3. Select the **Subject** drop-down list, and select a subject. The list of subjects is different for every organization.
4. Enter the message text in the Message box.
5. Optionally, select **Add Files** to attach a file. See Add Attachments for more information.
6. Select **Send**. The completed message is displayed.

Reply to Messages

If you can send messages to providers through Patient Portal, you can reply to them.

To reply to a message:

1. From the Messages dashboard, select the conversation you want to respond to. The conversation opens and displays all of the previous messages in that conversation. (Conversations with unread messages are indicated by a blue dot to the left of the message.)
2. Enter your response in the Enter Message box.
3. Optionally, select **Add Files** to attach a file. See Add Attachments for file requirements.
4. Select **Send**. You see the message and file name on the page with the date and time the message was sent.

Forward Messages

You can forward a message that you received to another provider.

To forward a message:

1. From the Messages dashboard, select a conversation. The conversation opens and displays all of the previous messages in that conversation.
2. Select **Forward** from the More Actions menu.
3. Select the Recipient or enter the email address for the recipient you want to send the message to.
4. Optionally, enter an additional message in the Message box.

5. Optionally, select **Add Files** to attach a file. See Add Attachments for file requirements.
6. Select **Send**. The completed message is displayed with the name of the recipient you forwarded it to.

Add Attachments

If your Patient Portal privileges include the message option, you can add up to five files in PNG, JPG, GIF, DOC, or XLS file format with a size of 50 MB or smaller as an attachment.

To add an attachment:

1. While writing a message as described in Write New Messages or Reply to Messages, select **Add Files**, and follow your device's instructions to select a file.
2. From your device, find and select the file to upload.

5 Health Records

You access information on your health record through Patient Portal. For example, you can find details on allergies, immunizations, and health conditions. You can also download the details to a PDF file and share the data, if necessary.

- View the Health Record Dashboard
  The Health Record dashboard lets you to view all of your health record information. To access the Health Record dashboard, select **Health Record** on the main menu.
- Sensitive Health Record Details
  Your organization might mark certain types of test results or vital signs as Sensitive. Marking these details as Sensitive restricts the information from being viewed by authorized representatives of protected minors.
- View Health History
  An electronic health record (EHR) is a digital version of a patient's chart. Health records allow patients and their authorized representatives to securely share health history and personal information with the clinicians, specialists, and facilities involved in their care.
- Download a Health Record
  You can view and download all or parts of a health record to your device. The health record will be condensed and presented as a Continuity of Care Document (CCD). You can choose to download the CCD in PDF or XML format.
- Send a Health Record
  You view and share all or part of a health record with a provider or another person through email. This CCD record is usually sent to physicians or specialists at a different hospital to give them a complete understanding of current health and health history.
- View Allergies
  In your health record, the Allergies page displays current and past allergies documented by your provider or care team.
- View Health Conditions
  In your health record, the Health Conditions page displays current and past health conditions documented by your provider or care team.
- View Immunizations
  In your health record, the Immunizations page displays current and past immunization documented by your provider or care teams.
- View Medications
  In your health record, the Medications page displays current and past medications documented by your provider or care team.
- View Procedures
  In your health record, the Procedures page displays current and past procedures documented by your provider or care team.
- View Reports
  In your health record, the Reports page displays current and past diagnostic reports documented by your provider or care team. Reports can include narrative reports such as radiology findings, pathology reports, cardiac stress tests, colonoscopy results, and so on.

- View Test Results
  In your health record, the Test Results page displays current and past test results documented by your provider or care team, for example, blood tests and cholesterol levels.
- View Vital Signs
  In your health record, the Vital Signs page displays the vital signs documented by your provider or care team. Vital signs can include information such as height, weight, blood pressure, and pulse.

View the Health Record Dashboard

The Health Record dashboard lets you to view all of your health record information. To access the Health Record dashboard, select **Health Record** on the main menu.

The dashboard includes information only for the currently selected person. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the dashboard to display information for the selected person.

The dashboard displays the Test Results page by default. Select the health record menu at the top of the page to view the other pages in the health record.

Each health record can include any of the following pages, depending on the organization's settings and your account access:

- Allergies
- Health Conditions
- Immunizations
- Test Results
- Medications
- Procedures
- Reports
- Vital Signs

See View Health History for more details on these pages.

> **Note:**
>
> Depending on your organization's settings, Health Conditions might be known alternatively as Diagnoses, Health Issues, Problems, or a similar name. Additionally, some activity might not be displayed or might have a dielay. See View Health History for more details

Sensitive Health Record Details

Your organization might mark certain types of test results or vital signs as Sensitive. Marking these details as Sensitive restricts the information from being viewed by authorized representatives of protected minors.

For example, the status of a person impacts what they see:

- **Protected minors**: Protected minors are not yet legal adults but who have the ability to restrict portions of their health information from any authorized representatives who can access their account. The exact age varies between jurisdictions, but the default protected minor age is 13. Your organization might control how your organization's patient portal displays the protected information to authorized representatives. If a protected minor restricts sensitive data from view, you cannot view that information in the patient portal.

- **Managed adults**: The adult age is the age at which a minor legally becomes an adult. By default, the adult age is 18, but this age might be different based on your the law in your organization's location. Patient portal users who are an adult age have full control of their information and can choose which sections to restrict for any authorized representatives who can access their account.

Additionally, depending on your organization's settings, a delay in hours might be set between when a sensitive details are documented by the provider or care team and when they are displayed in the health record. The delay lets time for the provider to communicate those details directly to the patient.

When the details are finally committed to the health record, a message is displayed in the patient portal that includes the amount of time that passed before they were posted. Typically, a 48-hour delay happens between when the details are committed to the health record and when they are displayed in the patient portal.

View Health History

An electronic health record (EHR) is a digital version of a patient’s chart. Health records allow patients and their authorized representatives to securely share health history and personal information with the clinicians, specialists, and facilities involved in their care.

You cannot edit or delete health history items. If you need to make changes to your heath history, ask your care team to make the changes.

> **Note:**
>
> Depending on your organization's settings, health conditions might be known alternatively as diagnoses, health issues, or problems. And, depending on your organization and account settings, some activity (like sensitive test results) might not be displayed or might be delayed.

Each health record can include any of the following pages, depending on the organization's settings and your account access:

- Allergies
- Health Conditions

  > **Note:**
  >
  > Depending on your organization's settings, Health Conditions might be known alternatively as Diagnoses, Health Issues, Problems, or a similar name.

- Immunizations
- Test Results
- Medications
- Procedures
- Reports

- Vital Signs

You can also see your most recent health record activity by selecting **See All Activity** in the Latest Activity section. You can also select **View** on a Home dashboard card to open the details of just that health history item.

Download a Health Record

You can view and download all or parts of a health record to your device. The health record will be condensed and presented as a Continuity of Care Document (CCD). You can choose to download the CCD in PDF or XML format.

- **XML:** Download as a machine readable CCD that can be uploaded to a health record system or given to doctors requesting this format. A CCD is a health record document standard used by U.S. healthcare organizations for sharing electronic health records. The XML format is typically used by physicians or specialists to share health record information between hospitals to give them a detailed understanding of current health and health history.
- **PDF:** Download as a PDF file that you can save, print, or view on most computers and smartphones.

To download a health record:

1. From the User (Switch Profile) menu, select **Download Record**.
2. Select the file size:
   a. **Entire Record**: Send your entire record.
   b. **Partial Record**: Choose which visits (also called encounters) you want to download.
      - Select **Date Range**.
      - Select or enter the start date and end date.
      - Select **Apply**. The list of encounters is updated to a limited number based on the date range you selected.
   c. Select the check boxes next to each encounter you want to include.
3. Select **Download**. If individual encounters were selected, an XML and PDF file are downloaded for each encounter. If the encounter record was selected, an XML and PDF file are downloaded for the entire record.

Send a Health Record

You view and share all or part of a health record with a provider or another person through email. This CCD record is usually sent to physicians or specialists at a different hospital to give them a complete understanding of current health and health history.

To share a health record:

1. Select **Share Health Record**.
2. Enter or select the email address where you want to send your record. Records sent to email addresses that end in direct.com use enhanced security. Other types of email addresses use standard security.

> **Note:**
>
> This file might contain sensitive personal health information. Be careful when sending your personal details, and share it with only people you trust. Contact your provider to ask whether they have a Direct email address.

3. Select **Continue**. The Choose Records page is displayed.
4. Select the file size:
   a. **Entire Record**: Send your entire record.
   b. **Partial Record**: Choose which visits (also called encounters) you want to send.
      - Select **Date Range**.
      - Select or enter the start date and end date.
      - Select **Apply**. The list of encounters is updated to a limited number based on the date range you selected.
   c. Select the check boxes next to each encounter you want to include.
5. Select **Continue**. The New Message page is displayed.
6. Enter a brief message to include with the file.
7. Select **Return Contact Method** to enter a phone number and email address where you want the recipient to respond.
8. Optionally, select **Edit** to make any changes or select a different date range.
9. Select **Send**. The Home dashboard opens and you see a success message at the bottom of the page. If indivitual encounters were selected, an XML and PDF file are sent for each encounter. If the entire record was selected, an XML and PDF file are sent for the entire record.

View Allergies

In your health record, the Allergies page displays current and past allergies documented by your provider or care team.

This page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

The allergies listed include additional details if available, such as name, type, any comments written about it, and the date of onset.

> **Note:**
>
> The Allergies page includes information only for the currently selected account. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view allergies:

1. From the Health Record dashboard, select **Allergies** from the health record menu at the top of the page.
2. Optionally, search the list of allergies by name. A list of relevant search results is displayed.
3. Select an allergy to view its details.

> **Note:**
>
> If you need to update your list of allergies, meet with your provider to discuss and make any changes.

View Health Conditions

In your health record, the Health Conditions page displays current and past health conditions documented by your provider or care team.

The health conditions listed include additional details if available, such as the name and date of onset. Depending on your organization's settings, health conditions might be known alternatively as diagnoses, health issues, or problems.

This page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

> **Note:**
>
> The Health Conditions page includes information only for the currently selected account. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view health conditions:

1. From the Health Record dashboard, select the health conditions page from the health record menu at the top of the page.
2. Select a tab:
   - **Active**: List of current, active health conditions.
   - **Resolved**: List of past health conditions that are no longer active.
3. Open a health condition to view its details.

> **Note:**
>
> To update your list of conditions, meet with your provider to discuss and document your health conditions.

View Immunizations

In your health record, the Immunizations page displays current and past immunization documented by your provider or care teams.

The listed immunizations may include additional details such as name, date administered, number of immunizations for a particular immunization type, and the history of similar immunizations.

> **Note:**
>
> The Immunizations page includes information only for the currently selected account. If you manage the accounts for others, select the Profile (Switch User) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view immunizations:

1. From the Health Record dashboard, select **Immunizations** from the health record menu at the top of the page.
2. Optionally, search the list of immunizations by name. A list of relevant search results is displayed.
3. Select **Details** next to an immunization to view its details, including the following information (as available):
   - Date received
   - Administered by location
   - Immunization product name
   - Lot number
   - Manufacturer

   > **Note:**
   >
   > To update your list of conditions, meet with your provider to discuss and document your immunizations.

View Medications

In your health record, the Medications page displays current and past medications documented by your provider or care team.

> **Note:**
>
> The Medications page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view medications:

1. From the Health Record dashboard, select **Medications** from the health record menu at the top of the page.
2. Select a tab:
   - **Past**: Past Medications that are no longer active.
   - **Active**: Active Medications you are currently taking.
3. Optionally, search the list of medications by name. Medications are not case-sensitive. A list of relevant search results is displayed.
4. Select a medication to view its details, such as name, start date, prescribed by provider, and directions for use.

View Procedures

In your health record, the Procedures page displays current and past procedures documented by your provider or care team.

> **Note:**
>
> The Procedures page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view procedures:

1. From the Health Record dashboard, select **Procedures** from the health record menu at the top of the page.
2. Select **View** to next to a procedure to view its details, such as name, date, and location of procedure.

View Reports

In your health record, the Reports page displays current and past diagnostic reports documented by your provider or care team. Reports can include narrative reports such as radiology findings, pathology reports, cardiac stress tests, colonoscopy results, and so on.

> **Note:**
>
> The Reports page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view reports:

1. From the Health Record  dashboard, select **Reports** from the health record menu at the top of the page.
2. Alternatively, optionally search the list of reports by name, for example, **Radiology**, or date range. A list of relevant search results is displayed.
3. Select **View** next to a report to display the file.
4. When you are done viewing the report, close the tab to return to the patient portal.

View Test Results

In your health record, the Test Results page displays current and past test results documented by your provider or care team, for example, blood tests and cholesterol levels.

Test results might include:

- Laboratory results
- Radiology results
- Pathology results
- Microbiology results
- COVID-19 results

> **Note:**
>
> The Test Results page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view test results:

1. From the Health Record dashboard, select **Test Results** (if not already selected) from the health record menu at the top of the page.
2. Optionally, search the list of test results by name or date. A list of relevant search results is displayed.
3. Select **Details** next to a test result to see its details, including any of the following information (as available):
   - Test result name
   - Date conducted
   - Test result value
   - Reference range
   - Badge indicating where the value ranges compared to the reference range:
     - Critically Low
     - Low
     - Normal
     - High
     - Critically High
   - Any notes from the provider
   - Any attachments (select the file to open it in another tab)
   - Previous results of that same type

   Some test results might be marked as sensitive. Sensitive health record details can be delayed or unavailable to you. See Sensitive Health Record Details for more information.

   > **Note:**
   >
   > Ask your provider if you need more information about a test result.

View Vital Signs

In your health record, the Vital Signs page displays the vital signs documented by your provider or care team. Vital signs can include information such as height, weight, blood pressure, and pulse.

> **Note:**
>
> The Vital Signs page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

To view vital signs:

1. From the Health Record dashboard, select **Vital Signs** from the health record menu at the top of the page.
2. Optionally, search the list of vital signs by name or date. A list of relevant search results is displayed.
3. Select **History** next to a vital sign to see its details, including the date it was taken, name, measurement, and any previous entries for that same type.

> **Note:**
>
> Some vital signs might be marked as Sensitive. Sensitive health record details can be delayed or unavailable to you. See Sensitive Health Record Details for more information. Ask your provider if you need more information about a vital sign.

6 Appointments

You can view appointments, clinical notes, and schedule new, return, and repeat appointments. You can also reschedule or cancel an appointment.

- View the Appointments Dashboard
  The Appointments dashboard displays a list of past, favorite, and upcoming appointments for you (or the patient in context).
- Appointment Details
  You can view appointments details for your appointment from the Appointments dashboard.
- View Clinical Notes
  Clinical notes are documents might be available for a patient's completed visits (also called encounters) with a care team. Clinical notes can include any information or documents provided by the care team, such as discharge instructions, history and physical, procedure notes, or consultations.
- View Visit Summaries
  Visit summaries are documents created by Patient Portal after a patient's visit (also called an encounter) with a care team. Visit summaries can provide an overview of what occurred during the visit in relation to your overall health history.
- Manage Favorite Appointments
  Favorite appointments are displayed on the Favorites tab of the Appointments dashboard and on the Scheduling Options page (after selecting Schedule Appointment).
- Schedule a New Appointment
  You can schedule a new medical appointment with your provider through Patient Portal.
- Schedule a Return Appointment
  You can schedule a return medical appointment with your provider through Patient Portal.
- Schedule a Repeat Appointment
  The book again feature allows you to schedule a favorite or completed appointment type again.
- Reschedule an Appointment
  You can directly reschedule an upcoming scheduled (but not yet completed) appointment.
- Cancel an Appointment
  The Cancel functionality allows a patient portal user to cancel an appointment they no longer are able to make or that they no longer want to have.

View the Appointments Dashboard

The Appointments dashboard displays a list of past, favorite, and upcoming appointments for you (or the patient in context).

The dashboard includes information only for the currently selected person. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the dashboard to display information for the selected person. The dashboard includes these pages:

- **Upcoming**: All appointments with future date (both scheduled and unscheduled).
- **Past**: All appointments with a past date that were canceled, completed, or missed.
- **Favorites**: Appointment types you previously added as your favorite. (To add an appointment type as a favorite select **Add to Favorites** from the More Actions menu on an appointment card. See Manage Favorite Appointments for more details on adding favorites.)

To view a page, select its tab at the top of the dashboard.

1. Optionally, use the search bar at the top of the Appointments (Past) page to search for past appointments by date, provider, medical facility, or appointment type.
2. Select an appointment card to view its details. See Appointment Details for more information.

Appointment Details

You can view appointments details for your appointment from the Appointments dashboard.

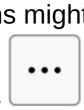
From the Appointments dashboard, select an appointment to view any details that are available, such as:

- Time and date
- Specialty and type of appointment
- Reason for appointment
- Provider name and details
- Location details
- Visit summary

> **Note:**
>
> Visit summaries might not be available until a few days after your appointment. Contact your provider's office or care team if you have any concerns.

- Clinical notes

> **Note:**
>
> Clinical notes might not be available until a few days after your appointment. Contact your provider's office or care team if you have any concerns.

The following buttons might be available for an appointment either as a button or as an option on the More Actions  menu:

- **Pre-Register**Pre-register for an upcoming appointment to save time during the check-in process.
- **Arrival:**Let the care team know you have arrived. Make sure you are physically present at the office before you start the arrival process.

- **Check In**: Check in for an appointment. The check-in option is available is available 30 days before the appointment starts. Make sure you are physically present at the office before you start the check-in process.
- **Reschedule**: Change the appointment details for an upcoming, canceled, or missed appointment.

> **Note:**
>
> If you are currently within 48 hours of the appointment time, you might be unable to reschedule an appointment. Select the **Call to Reschedule or Cancel** option from the More Actions menu to call the office to reschedule or cancel the appointment.

- **Book Again**: Book again a completed or favorite appointment. This option saves you time by filling in many of the appointment details for you.
- **Cancel Appointment**: Cancel an upcoming appointment without scheduling a new one.

> **Note:**
>
> If you are currently within 48 hours of the appointment time, you might be unable to reschedule an appointment. Select the **Call to Reschedule or Cancel** option from the More Actions menu to call the office to reschedule or cancel the appointment.

- **Add to Favorites**: Adds an appointment type as a favorite. Favorite appointments are displayed on the Favorites tab of the Appointments dashboard. See Manage Favorite Appointments for more information.
- **Add to Calendar**: Download the appointment as an .ICS file that you can open and save to your calendar. (See your calendar tool's Help for additional steps.)

Depending on your device, the following actions might also be available to you:

- Select any linked phone number to call that number on your device (if your device supports that feature).
- Select any linked address to open the default maps feature on your device.

To return to the Home dashboard, select Home on the main menu. You are returned to the Home dashboard.

View Clinical Notes

Clinical notes are documents might be available for a patient's completed visits (also called encounters) with a care team. Clinical notes can include any information or documents provided by the care team, such as discharge instructions, history and physical, procedure notes, or consultations.

To view a clinical note:

1. From the Appointments dashboard on the Past tab, select an appointment card for a past appointment that was completed (not canceled).
2. On the Appointment Details page, select the link for a clinical note or document. The clinical note or document details are displayed.

> **Note:**
>
> Clinical notes might not be available until a couple of days after your appointment is completed. Contact your provider if you have any concerns.

View Visit Summaries

Visit summaries are documents created by Patient Portal after a patient's visit (also called an encounter) with a care team. Visit summaries can provide an overview of what occurred during the visit in relation to your overall health history.

Visit summaries can include any of the following types of details:

- Patient name
- Provider’s office contact information
- Date and location of the visit
- An updated medication list
- Updated vital signs
- Reasons for the visit
- Procedures that occurred
- Any instructions based on clinical discussions that took place during the office visit
- Any updates to health conditions
- Immunizations or medications administered during the visit
- A summary of topics discussed during visit
- Time and location of next appointment or testing if scheduled (or a recommended appointment time if not scheduled)
- List of other appointments and tests that needs to be scheduled with contact information
- Recommended patient decision aids
- Laboratory and other diagnostic test orders
- Test and laboratory results (if received up to 24 hours after visit)
- Symptoms

To view a visit summary:

1. From the Appointments dashboard on the Past tab, select an appointment card for a past appointment that was completed (not canceled).
2. On the Appointments Details page, select **Visit Summary**. The Visit Summary details are displayed.

> **Note:**
>
> Visit summaries might not be available until a couple of days after your appointment is completed. Contact your provider if you have any concerns.

Manage Favorite Appointments

Favorite appointments are displayed on the Favorites tab of the Appointments dashboard and on the Scheduling Options page (after selecting Schedule Appointment).

To add an appointment type as a favorite:

- Select **Add to Favorites** from the More Actions menu of an appointment card.

To remove an item as a favorite:

- Clear the star selection on the appointment card.

Select **Schedule New Appointment** to display the Scheduling Options page in the Favorites section. Select a favoriet appointment type to schedule that appointment type again.

Schedule a New Appointment

You can schedule a new medical appointment with your provider through Patient Portal.

To schedule a new appointment:

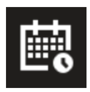
1. From the Appointments dashboard, select **Schedule New Appointment**. The Scheduling Options page is displayed.
2. Select an appointment type from one of the following options:
   - **Return Visit Providers**: Select the name of a provider to schedule a return visit with that provider.
   - **Favorites**: Select one of your favorite appointment types to schedule a new appointment of that type with that provider.
   - **Find Care**: Select the Find Care button to find care with a new provider or specialty.
3. Select **Start** on the guided process page.
4. Provide an appointment reason:
   a. Select specialty, an appointment type, and provide a reason for the appointment then select **Search**. Follow the guided process to select a time slot and location.
   b. Select a provider to view additional date and time options.

5. Select a time and date from the available options. Your appointment is held for 20 minutes before it is released to other patients.
6. Optionally, select**Add to Favorites** to add this appointment type to your list of favorites.
7. If the appointment details look correct, select **Schedule New Appointment**. A confirmation page is displayed.
8. Optionally, select **Add to Calendar** from the More Actions menu to download the appointment as a file that you can open and save to your calendar. (See your calendar tool's Help for additional steps.)
9. Optionally, return to the Appointments dashboard to see the newly scheduled appointment displayed as a card on the Upcoming Appointments tab.

Schedule a Return Appointment

You can schedule a return medical appointment with your provider through Patient Portal.

To schedule a return visit with your provider you have already seen:

1. From the Appointments  dashboard, select the **Schedule Appointment** button. The Scheduling Options page is displayed.
2. From the Return Visit Providers section, select the name of the provider you want to schedule a return visit with.
3. Select **Start** on the guided process page.
4. Provide an appointment reason:
   a. From the Type of Appointment box, select an appointment type.
   b. In the Appointment Reason box, enter a reason for the appointment and then select **Continue**.
5. Select an appointment time from the available options, and then select **Continue**.
6. Optionally, select **Add to Favorites** to add this appointment type to your list of favorites.
7. If the appointment details look correct, select **Schedule New Appointment**. A confirmation page is displayed.
8. Optionally, select **Add to Calendar** from the More Actions menu to download the appointment as a file that you can open and save to your calendar. (See your calendar tool's Help for additional steps.)
9. Optionally return to the Appointments dashboard to see the newly scheduled appointment displayed as a card on the Upcoming Appointments tab.

You can register or check-in to your appointment when it is the appropriate time. See Check In for an Appointment for more details.

Schedule a Repeat Appointment

The book again feature allows you to schedule a favorite or completed appointment type again.

> **Note:**
>
> The Book Again option is available only for appointments you completed in the past that were not canceled or missed.

To book an appointment again:

1. From the Appointments dashboard, select **Book Again** from the Favorites or Completed tab for a completed appointment that you want to book again.
2. Follow the guided process to select a time and date: Select an appointment time from the available options, and then select **Continue**. The appointment details are dispalyed.
3. Optionally, select **Add to Favorites** to add this appointment type to your list of favorites.
4. Select **Schedule Appointment** to schedule the appointment. An appointment confirmation page is displayed with the details of the appointment.
5. Optionally, select **Add to Calendar** from the More Actions menu to download the appointment as a file that you can open and save to your calendar. (See your calendar tool's Help for additional steps.)
6. Optionally, return to the Appointments dashboard to see the newly scheduled appointment displayed as a card on the Upcoming Appointments tab.

You can register or check-in to your appointment when it is the appropriate time. See Check In for an Appointment for more details.

Reschedule an Appointment

You can directly reschedule an upcoming scheduled (but not yet completed) appointment.

> **Note:**
>
> If you are currently within 48 hours of the appointment time, you might be unable to reschedule an appointment. Select the Call to Reschedule or Cancel option from the the More Actions More Actions menu to call the office to reschedule or cancel the appointment.

To reschedule your appointment:

1. From the Appointments dashboard, select the **Upcoming** tab (if not already selected). Alternatively, find the appointment card on the Home dashboard.

2. Select **Reschedule** on the appointment card you want to reschedule. You are redirected to a page that has options for date and time for the specific provider and appointment type. If the appointment is no longer reschedulable online, a message may be displayed that provides instructions for calling the care team's office phone number.
3. Optionally, select the date box to change to a certain date and select an available time. You are redirected to a page that says Review appointment details.
4. In the Reschedule Reason box, enter the reason you are rescheduling the appointment.
5. Optionally, select **Add to Favorites** to add this appointment type to your list of favorites.
6. Select **Schedule New Appointment** to schedule the appointment. An appointment confirmation page is displayed with the details of the appointment.
7. Optionally select **Add to Calendar** from the More Actions menu to download the appointment as a file that you can open and save to your calendar. (See your calendar tool's Help for additional steps.)
8. Optionally, return to the Appointments dashboard to see the newly scheduled appointment displayed as a card on the Upcoming Appointments tab.

Cancel an Appointment

The Cancel functionality allows a patient portal user to cancel an appointment they no longer are able to make or that they no longer want to have.

> **Note:**
>
> If you are currently within 48 hours of the appointment time, you might be unable to reschedule an appointment. Select **Call to Reschedule** or **Cancel** from the More Actions  menu to call the office to reschedule or cancel the appointment.

To cancel an appointment:

1. From the Appointments  dashboard on the Upcoming Appointments tab, select **Cancel Appointment** on an applicable appointment card.
2. Select the **Cancel Reason** drop-down list and select an option.
3. Select **Cancel Appointment**. The drawer closes and the Appointments dashboard updates. The appointment is moved to the Previous tab and displays a red badge labeled **Canceled**.