Oracle® Health

Oracle Health Patient Portal Support User Guide

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Contents

Preface

This preface contains the following sections:

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

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1 Get Started

This guide provides information for support administrators who are responsible for assisting patient portal users when they encounter issues related to their patient portal account.

The Get Started section contains the following topics:

This guide also provides information about the following tasks:

- Introduction
- Access the Support Module

Introduction

This guide provides information for support administrators who are responsible for assisting patient portal users when they encounter issues related to their patient portal account.

The Support module is available from the Oracle Health Patient Portal Administrative Console. An administrative console super user must grant access to the Support module.

You can complete the following tasks in the Support module:

- View the Support module
- Search for patient portal users
- View patient portal user information
- View the most recent workflow invitation
- Send a new workflow link
- View proxy relationships
- Delete an account

This guide also provides information about the following tasks:

- Reset passwords
- Unlock an account

Access the Support Module

Before you can access the Support view, a patient portal administrator must provide access to the Oracle Health Patient Portal Administrative Console.

When access is granted, you receive an email prompting you to set up your username and password. Follow the prompts in the email to reset your username and password.

Once access is set up, sign in to the Oracle Health Patient Portal Administrative console and select **Support**.

2

Use the Support Module

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View the Support Module

The Support module provides access to activities that support personnel can complete on behalf of a Patient Portal user.

To view the Support module

1. Sign in to Oracle Health Patient Portal Administrative Console.
2. Select **Open** in the Support card. The Patient Search page is displayed.

Search for Patient Portal Users

When a patient portal user contacts you for assistance, verify their identity using your organization's policies and procedures. After you verify their identity, you can search for them to access the items you can help them with.

To search for patient portal users:

1. Access the Support module.
2. Select one of the following filters from the Filter Type list:
   a. Name and Date of Birth
   b. EHR Email
   c. Phone Number
3. Enter the applicable information from the patient portal user.

4. Select **Search**. Matching results are displayed.
5. Select the user.

View Patient Portal User Information

After you search for a Patient Portal user and verify their identity, you can select the record to view additional information.

The Details tab contains the following information:

- Name
- Date of birth
- Patient ID
- Medical record number (MRN)
- The date the profile was last viewed
- Whether the patient has a portal account

The Contact section contains the Patient Portal user's contact information including the EHR email address, mobile phone, home phone, and work phone.

> **Note:**
>
> The EHR email address is an email address saved in the EHR, and may be different from the Patient Portal user's primary email address.

The Proxy Relationships section contains information about anyone the person is an authorized representative for. For example, children could be listed under a parent's account.

The Invitations tab contains a list of invitations that have been sent to the patient from the Patient Portal.

- **Invitation Created For:** The person the invitation was created for. If a user is an authorized representative, the invitation could be to create a portal account for another person.
- **Unique URL Code**: The unique invitation code applied to the end of the URL to create the unique invitation link.
- **Workflow**: The workflow that the invitation was for. Currently, Self-registration and Patient Portal Account Creation are available.
- **Issued Date:** The date and time the invitation was sent.
- **Expiration Date:** The date and time the invitation expired or will expire, if the date is in the future. Invitations are valid for one month by default.
- **Last Used Date:** If the patient portal user accessed the invitation, this date and time indicates when the invitation was accessed.
- **Active:** Whether the invitation is active. If the expiration date has passed or if you have revoked the invitation, this column is **No**.
- **Status:** Whether the invitation is expired or unexpired. If the expiration date has not passed, the status is unexpired.

- **Action:** For active invitations, you can select whether to re-create an invitation, revoke an invitation, or show the link. You can copy the link and send it to the patient portal user if needed.

View the Most Recent Workflow Information

Workflow information is available from the Invitations tab.

To view the most recent workflow information:

1. Select the Invitations tab. Invitations are displayed chronologically with the most recent workflow listed at the top.
2. Optionally, from the Action menu, select **Show Link**. You can copy the link to provide it to the patient portal user.

Send a New Workflow Link

If a Patient Portal user can no longer access a workflow link or if it has expired, you can send them a new link.

To send a new workflow link:

1. From the Invitations tab, locate the previous workflow link.
2. From the Action menu, select **Re-create**. The Re-create invitation dialog box is displayed.
3. Select **Re-create**. A new invitation link is displayed in the Invitation dialog box.
4. Select **Copy Link**. The link is copied to your clipboard.
5. Send the link to the patient portal user through an email.

Revoke a Workflow Link

If a Patient Portal user no longer needs a workflow link or it was originally sent in error, you can revoke the link so that it no longer functions.

To revoke a workflow link:

1. From the Invitations tab, locate the workflow link you want to revoke.
2. From the Action menu, select **Revoke**. The Revoke Invitation message is displayed.
3. Select **Revoke**. The Re-create button is displayed in the Action column. If the Patient Portal user attempts to access the link, they cannot complete the workflow.

Re-create a Workflow Link

If a workflow link was revoked in error, you can re-create the workflow link to re-enable it for the patient portal user.

Re-creating a workflow link creates a new link ID associated with the Short URL Code. The URL code is re-created and the patient portal user can use the original link to access the invitation.

To re-create a workflow link:

1. From the Invitations tab, locate the workflow link you want to re-create.
2. From the Action menu, select **Re-create**. The Re-create Invitation dialog box is displayed.

3. Select **Re-create**. The new link is displayed in the Invitation Link box.
4. If the patient portal user needs the link again, select **Copy Link** and send it to their email address. If they still have access to the original link, they can use that link. A new row is displayed for the reactivated invitation.

Create an Invitation

Support module users can send invitations to Patient Portal users to create a new patient portal account or so they can self-register for an appointment if they do not have a patient portal account.

To create an invitation:

1. Select **Create Invitation**. The Create Invitation dialog box is displayed.
2. From the Workflow list, select the type of workflow you want to invite them to.
3. Select the person from the Create Invitation For list. If the Patient Portal user is a proxy for additional users, those users are displayed in the Create Invitation For list.
4. Select **Create**.

View Proxy Relationships

The Proxy Relationships section of the Details tab shows a list of people the patient has a proxy relationship with. Portal Authorized Representatives can call to set up an account for a proxy. For example, a parent may want to set up a patient portal account for their child so they can manage their child's health care and set up appointments.

As a proxy or authorized representative, the patient portal user can make healthcare-related decisions for the people on the list. For example, parents may be displayed in the Proxy Relationships tab for children who have the patient portal account.

When you create invitations, you can select who the invitation is for based on the proxy relationships.

The following information is displayed in the Proxy Relationships section:

- **Patient ID:** The first name of the person for whom the Patient Portal user is a proxy.
- **Full Name:** The last name of the person for whom the Patient Portal user is a proxy.
- **Relationship Type:** The relationship between the Patient Portal user and the proxy.
- **Relationship Code:** A system-generated code that identifies the relationship.
- **Email:** The proxy's email address.

Delete an Account

Administrative Console users with Support permissions can delete a patient portal account if your organization's policies allow.

When you receive a request to delete an account:

1. Follow your organization's procedures to verify the user's information.
2. Access the patient's information.
3. Select **Delete Account**. The Delete Account message is displayed. If you delete an account, the patient portal user's access credentials are removed and they can no longer

access their patient portal account. Established settings, patient diary notes, and messages are deleted.

Reset Passwords

You cannot reset passwords directly on behalf of a patient portal user, but you can walk them through the steps they need to take to reset a password.

To direct a caller to reset their password, follow your organization's procedures to verify the patient portal user's identity and then follow the steps outlined on Recover a Forgotten Password.

Unlock an Account

Accounts might become temporarily locked if a patient portal user tries to sign in unsuccessfully five times in a row.

If an account becomes locked while trying to create a new account, resend a workflow link. See Send a New Workflow Link for more information.