



MyPatientVisit Patient Portal User Guide
for IntellectPro

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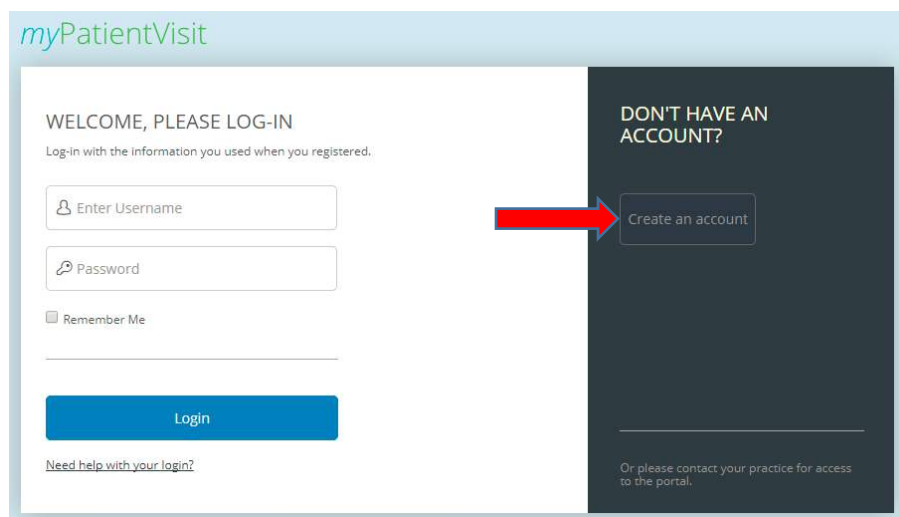
MyPatientVisit Patient Portal User Guide for IntellectPro

As part of the 2015 Edition Health Information Technology Certification Criteria, IntellectPro was certified on a new patient portal, MyPatientVisit. This user guide will walk the patient through registering, viewing and sending documents and sending messages from their portal.

Patient Setup and Login to the Patient Portal

Patient Registration

The first time a patient goes to MyPatientVisit, they will need to create an account using the information on the document provided from the provider's practice.



On the screen below, the patient will need to enter a Username using either an email address or a username of their choosing. The password must be at least 8 characters and contain three of the four password requirements:

- At least 1 uppercase character (A through Z)
- At least 1 lowercase character (a through z)
- At least 1 numeric digit (0-9)
- At least 1 special character (~!@#\$%^&*;*;?+_)

The patient will enter their first and last name, date of birth, zip code along with the practice ID and security code, which is listed on the document provided from the provider's practice. The patient can click on the [Terms and Conditions](#) link to review these before clicking the checkbox to agree to them. Then select the "Create Account" button.

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LET'S CREATE YOUR ACCOUNT!

USERNAME (LOGIN ID):*	PRACTICE ID*	DATE OF BIRTH:*
Enter	Enter	mm/dd/yyyy 
PASSWORD:*	CONFIRM PASSWORD:*	ZIP:*
Enter	Enter	Enter
FIRST NAME:*	LAST NAME:*	SECURITY CODE:*
Enter	Enter	Enter

☐ I have read and understand the [Terms and Conditions](#)

*Required field

Security Questions

Patients will next be asked to select 3 security questions to be used if they forgot their password. Select a security question from each of the drop downs, then type the answer in the box labeled "Provide your answer".

The screenshot shows a web page for 'myPatientVisit' with a light blue header. The main content area is white and contains the following elements:

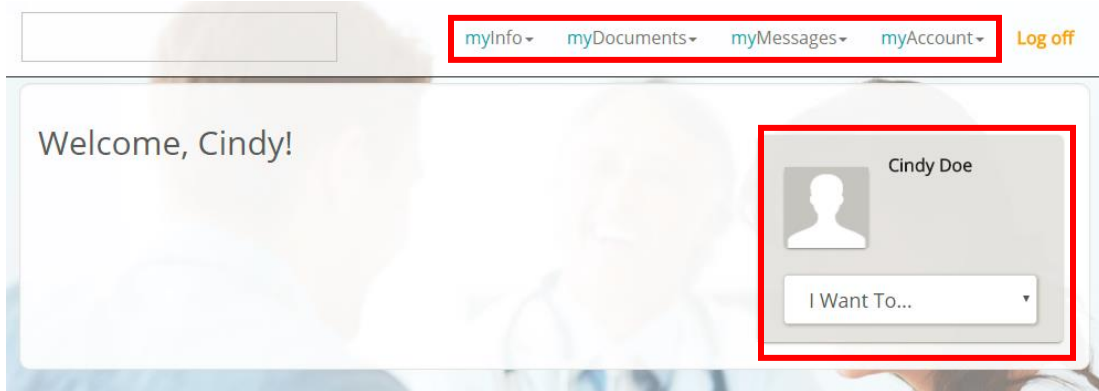
- Section Header:** 'JUST IN CASE YOU FORGET YOUR PASSWORD' in a dark blue font.
- Instructions:** 'Please select and answer three security questions from the list below. Your answers will be used to reset your password just in case you happen to forget it.'
- Question 1:** A section containing a dropdown menu with the text 'Select a security question' and a blue arrow icon, followed by a text input field with the placeholder 'Provide your answer'.
- Question 2:** A section containing a dropdown menu with the text 'Select a security question' and a blue arrow icon, followed by a text input field with the placeholder 'Provide your answer'.
- Question 3:** A section containing a dropdown menu with the text 'Select a security question' and a blue arrow icon, followed by a text input field with the placeholder 'Provide your answer'.
- Continue Button:** A blue button with the text 'Continue' located at the bottom right of the form area.

Patient Portal Dashboard

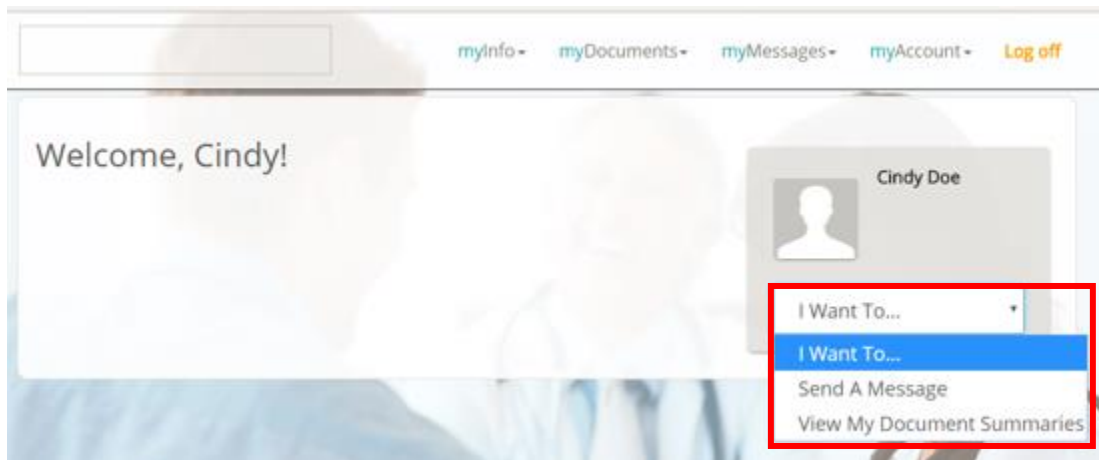
Patient's Dashboard

Patients will be taken to their dashboard page where they will see patient option dropdowns (myInfo, myDocuments, myMessages, myAccount) and I Want To.

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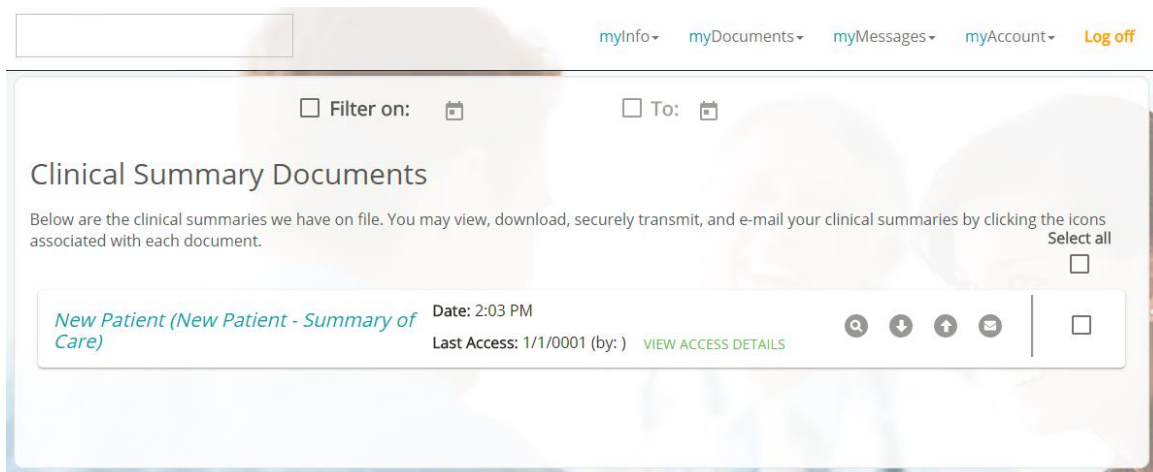
The dropdown for “I Want To...” has quick links to the most common actions: Send a Message and View My Document Summaries.



Patient Documents in myDocuments View

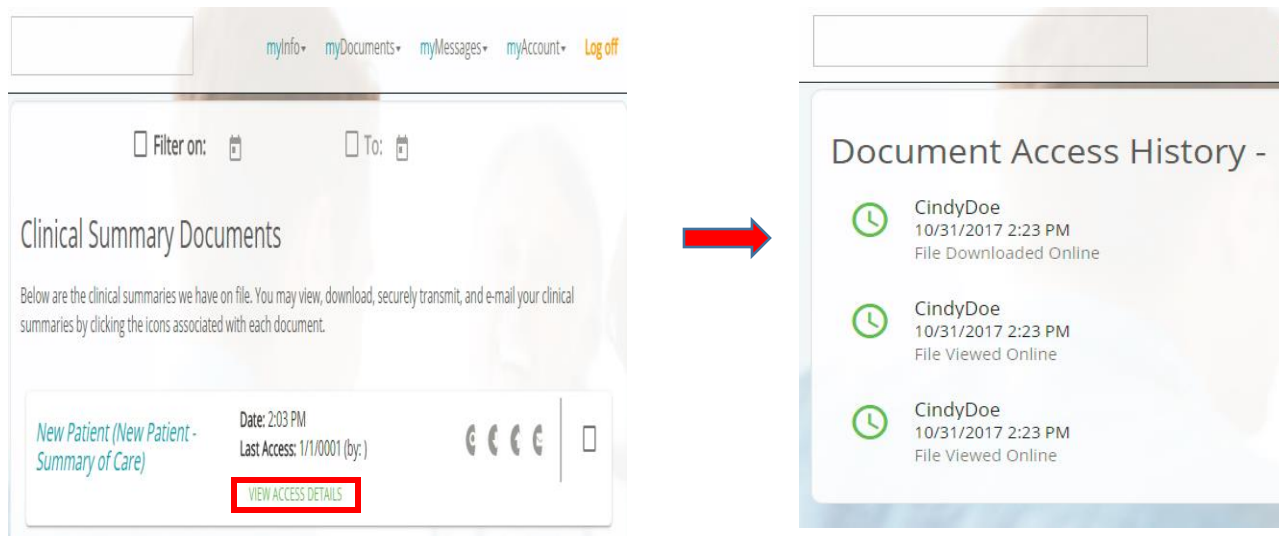
Clicking on myDocuments then selecting “Document Summary” will show a list of the documents the provider has shared with the patient. Patients can view, download, or share these documents.

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Patient Documents View Access Details

Patients can view the document access details by clicking on the “View Access Details” hyperlink.

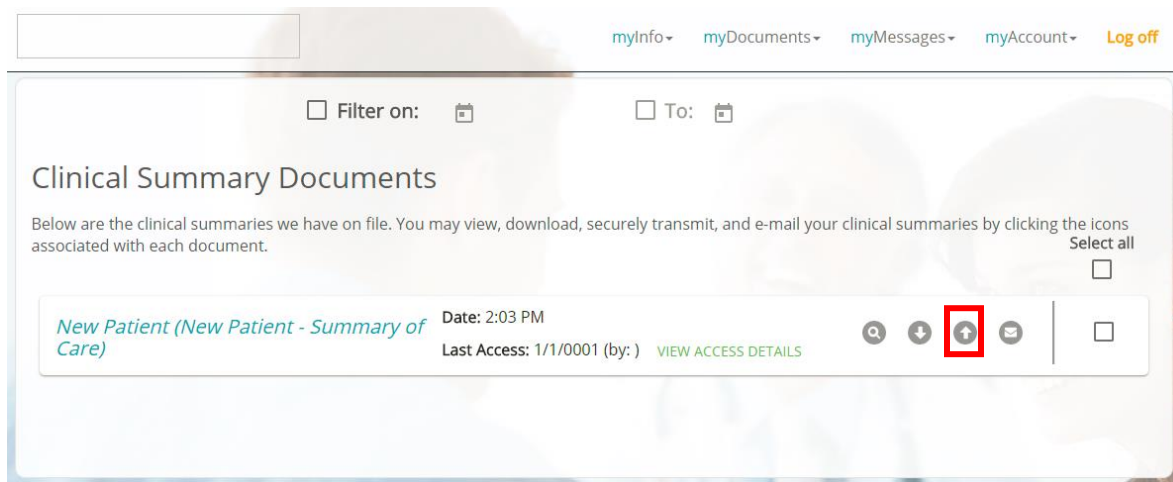


E-Mail Clinical Summary & Patient Documents through the Patient Portal

Secure Email

As part of the View, Download and Transmit (VDT) requirement, patients can securely send their Summary of Care (CCD) document to another provider of their choice by clicking on the up arrow (transmit securely) next to the document.

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Enter the provider's secure email address in To, a Subject, and a message to the provider in the Body.

The screenshot shows the 'Transmit Documents Securely' form. At the top, there is a navigation bar with links for 'myInfo', 'myDocuments', 'myMessages', 'myAccount', and 'Log off'. Below the navigation bar, there is a search bar and a 'Filter on:' dropdown. The main content area displays the 'Transmit Documents Securely' section. It includes a text area for entering the secure email address(es) you'd like to securely send your document to. Below this, there are two document links: 'CCDA_1.xml' and 'CCDA_1.pdf'. The form has three main sections: 'To:', 'Subject:', and 'Body:'. Each section has a text input field. The 'To:' field has a person icon. The 'Subject:' field has a document icon. The 'Body:' field has a speech bubble icon. At the bottom right, there are 'SEND' and 'CANCEL' buttons.

Unencrypted Email

As part of the View, Download and Transmit (VDT) requirement, patients are now able to view and email their Summary of Care (CCD) and Patient documents published files through an unencrypted email rather than secure direct message to a 3rd party of their choice.

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The screenshot shows the 'Clinical Summary Documents' section of the patient portal. At the top, there is a navigation bar with links for 'myInfo', 'myDocuments', 'myMessages', 'myAccount', and 'Log off'. Below the navigation bar, there are filters for 'Filter on:' and 'To:'. The main heading is 'Clinical Summary Documents'. Below this, a message states: 'Below are the clinical summaries we have on file. You may view, download, securely transmit, and e-mail your clinical summaries by clicking the icons associated with each document.' A table lists the documents. The first document is 'New Patient (New Patient - Summary of Care)' with a date of '2:03 PM' and a last access of '1/1/0001 (by:)'. To the right of the document name are four icons: a magnifying glass, a download arrow, an upload arrow, and an email icon. The email icon is highlighted with a red square. To the right of the icons is a 'Select all' checkbox.

myInfo myDocuments myMessages myAccount Log off

Filter on: To:

Clinical Summary Documents

Below are the clinical summaries we have on file. You may view, download, securely transmit, and e-mail your clinical summaries by clicking the icons associated with each document.

New Patient (New Patient - Summary of Care)	Date: 2:03 PM Last Access: 1/1/0001 (by:)	VIEW ACCESS DETAILS	   	Select all ☐
---	---	---------------------	---	--

Unencrypted Email Warning Messages

A warning message is visibly displayed on the page to ensure the patient is aware that this is an unsecure channel.

The screenshot shows the 'E-mail Your Document(s)' page. At the top, there is a navigation bar with links for 'myInfo', 'myDocuments', 'myMessages', 'myAccount', and 'Log off'. Below the navigation bar, the heading is 'E-mail Your Document(s)'. Below this, a message states: 'Enter the email addresses you'd like to send your document(s) to. You may enter multiple e-mail addresses by pressing enter after you're done typing the address.' A red warning message follows: 'The document(s) will be sent to the recipient(s) completely unencrypted. Please make sure that you are comfortable sending the document(s) as is, without any encryption or additional protection.' Below the warning, there is a section for 'Documents to send:' which lists 'CCDA_32.xml' and 'CCDA_32.pdf'. Below this is a 'To:' field with a person icon and a text input area. Below the 'To:' field is a 'Body: *' field with a text input area. At the bottom right, there are 'SEND' and 'CANCEL' buttons.

myInfo myDocuments myMessages myAccount Log off

E-mail Your Document(s)

Enter the email addresses you'd like to send your document(s) to. You may enter multiple e-mail addresses by pressing enter after you're done typing the address.

The document(s) will be sent to the recipient(s) completely unencrypted. Please make sure that you are comfortable sending the document(s) as is, without any encryption or additional protection.

Documents to send:

CCDA_32.xml
CCDA_32.pdf

To:

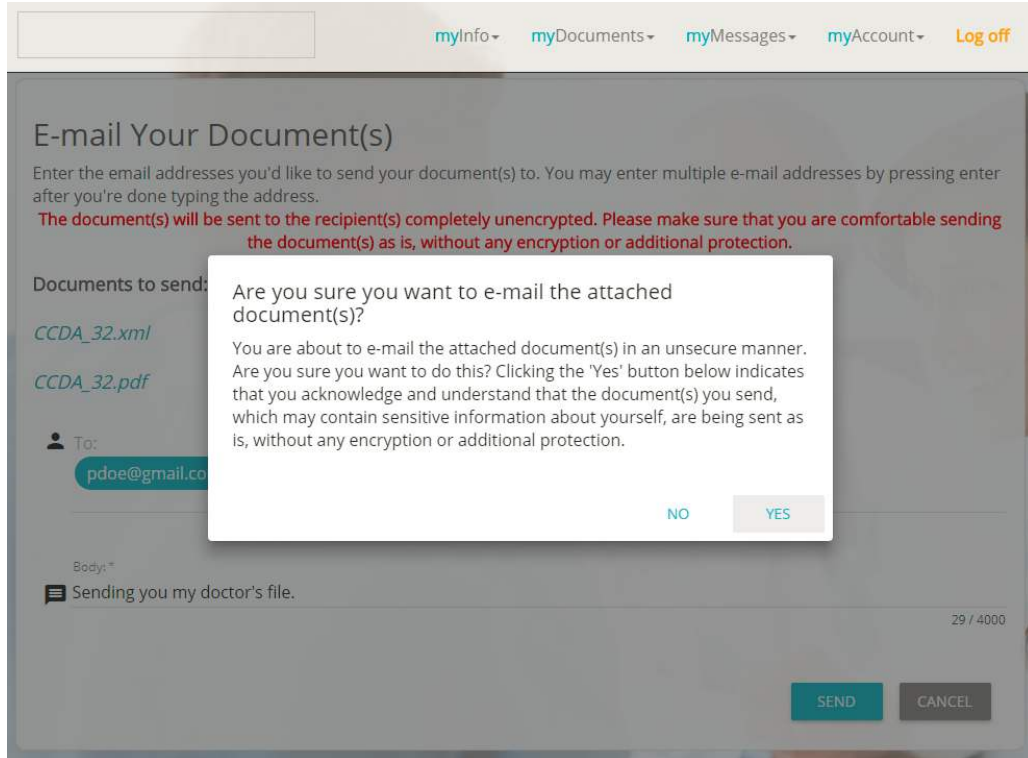
Body: *

0 / 4000

SEND CANCEL

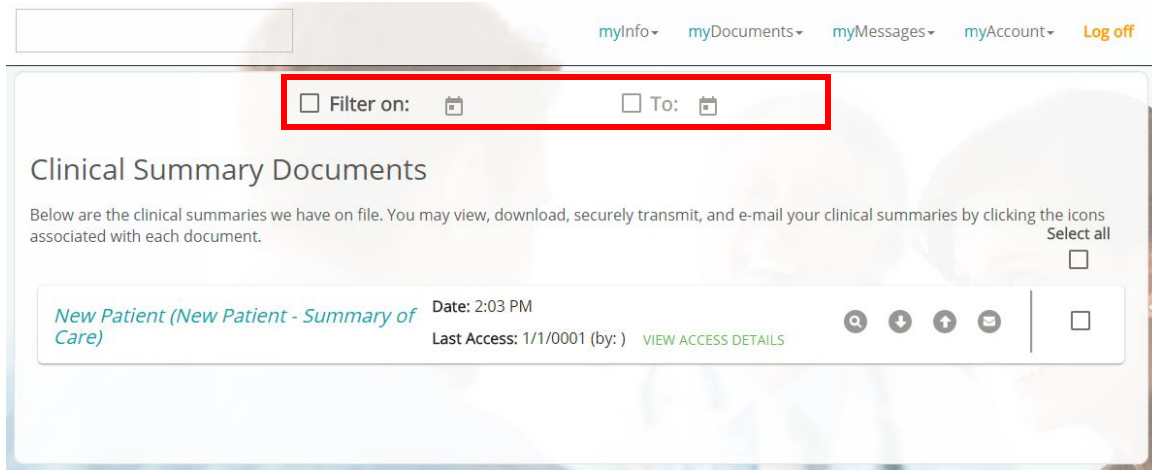
When the patient clicks the 'Send' button to send the email, a warning pop-up window is displayed and the user would have to manually click the "Yes" or "No" button to continue or cancel action.

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Ability to Filter on Summary of Care Documents

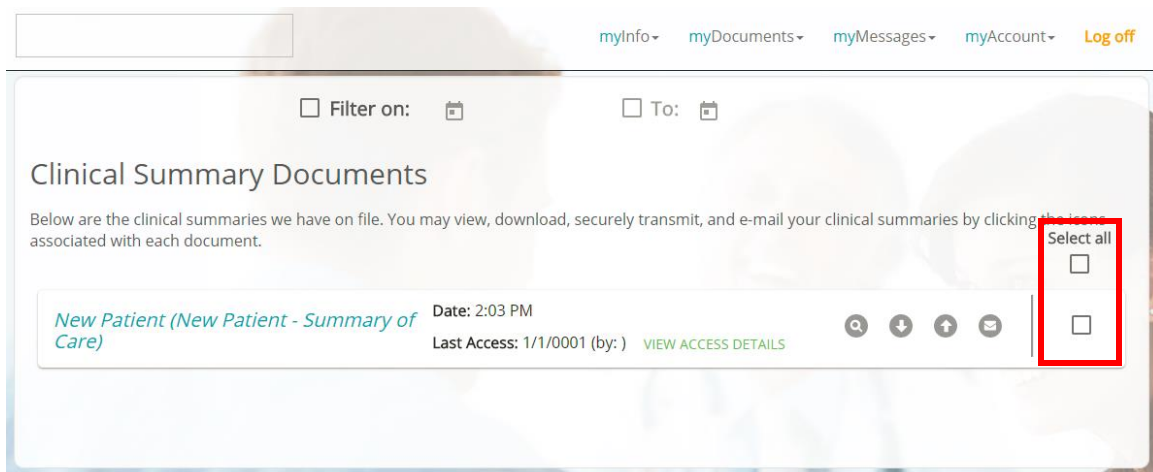
A patient can now filter on specific date or date range for their summary of care documents or patient documents that was published to them on the Patient Portal.



Ability to Multi - Select Documents to View, Download, Transmit and email

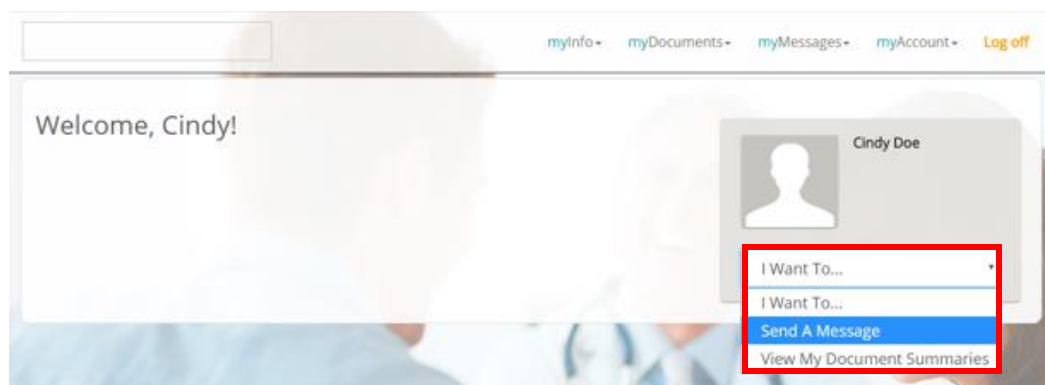
A patient can select all documents published on the patient portal to view, download, securely transmit or email.

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Send a Message

Patients can send a secure message to any of their providers. From the dashboard, click on “I Want Too ...” dropdown and select “Send A Message”.



The patient will see the “Send and review messages” screen. Select the Provider to send a secure message to.

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myInfo myDocuments myMessages myAccount Log off

Send and review messages

This feature (email) is a convenient way to send electronic messages to your doctor's office, as well as various other departments, depending on your needs. For example, you have the ability to: - Request a referral - Request medication renewals - Compliment a staff member or office - Lodge a complaint - Ask a billing question Please observe the following guidelines when using electronic communication: - This email is not intended for Medical diagnosis or treatment, there may be a delay in response. - Do not use electronic communication for urgent matters, such as loss of vision or acute eye pain. Call our office if you are experiencing any eye problems. Documentation of your message will become part of your medical record. - If you are unable to describe your condition in the space provided, please call our office. - Your message may be read by others who are involved in your care besides your doctor. If you do not receive a timely reply, please contact our office. - If you leave this screen without sending your message, your message will NOT be saved.

In an emergency, call 911 or your local emergency number immediately. This is not an emergency service.

 **Provider: Davis, Albert**
Date: 01/01/0001 12:00 AM

The patient can read secure messages from that provider or send a secure message to that provider by typing the message then selecting the “Send” button.

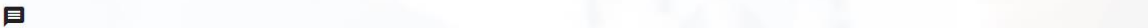
myInfo myDocuments myMessages myAccount Log off

Provider: Davis, Albert

Office Office
07/26/2017 9:46 AM
Hello Alice, come in early on Friday please.

 Me
07/26/2017 9:47 AM
Sounds good. I'll be there.

Reply to thread:

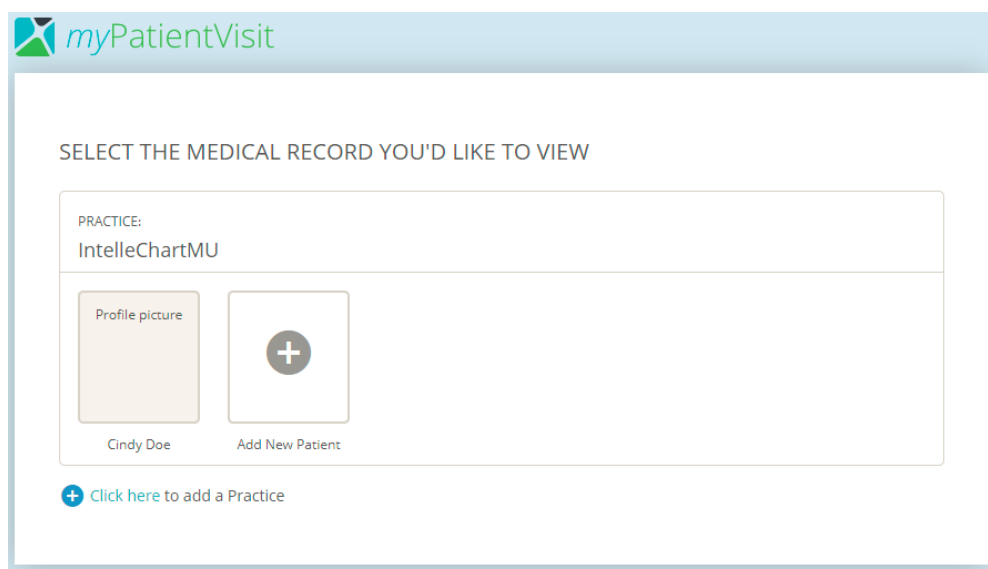
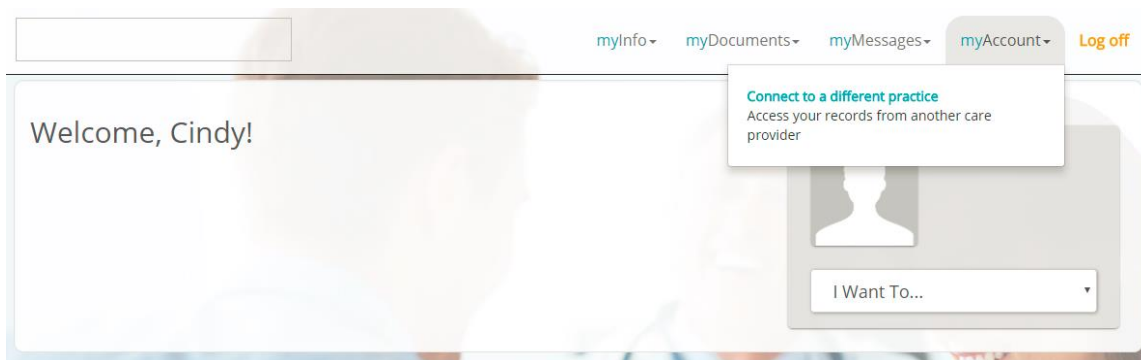
 0 / 4000

SEND CANCEL

Connecting to another practice

Patients can add other practices, who also use MyPatientVisit, to their account, or add additional patients, such as children, spouse or parent. This is done by selecting myAccount then “Connect to a different practice”. To connect to a different practice, the patient will need the information from their provider showing the security code and practice ID.

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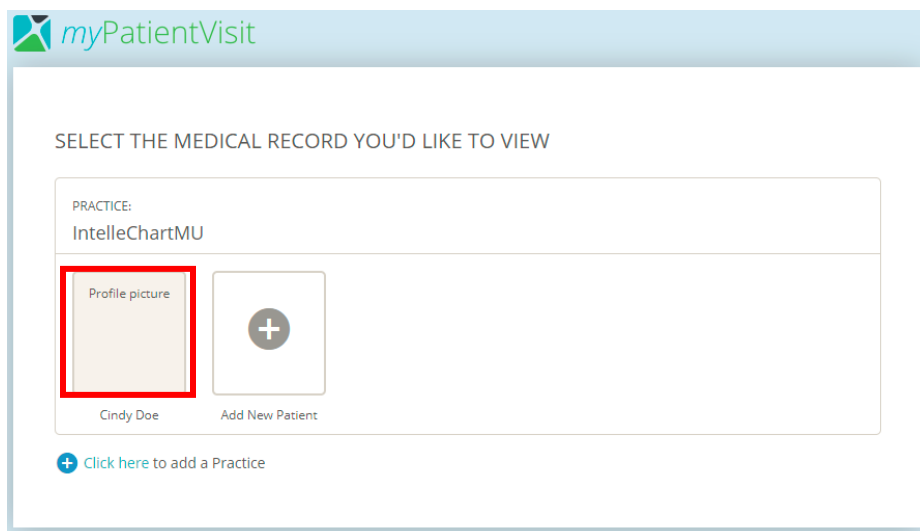


Subsequent Patient Login

Patient Login

When the patient logs in subsequently after the initial registration, they will need to click on the box above their name to access their documents.

MyPatientVisit Patient Portal User Guide for IntelChartPro



myPatientVisit

SELECT THE MEDICAL RECORD YOU'D LIKE TO VIEW

PRACTICE:
IntelChartMU

Profile picture

Cindy Doe

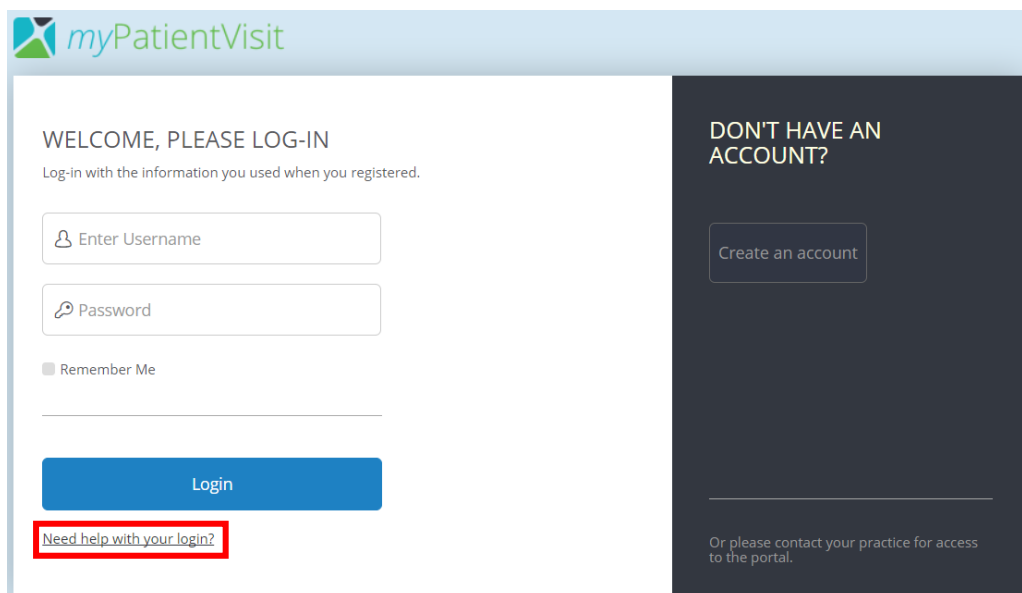
Add New Patient

+ Click here to add a Practice

Forgot Login Credentials

Patient Forgot Username or Password

When a patient forgets their username or password, they can get assistance by clicking on “Need help with your login?” on the login screen.



myPatientVisit

WELCOME, PLEASE LOG-IN

Log-in with the information you used when you registered.

Enter Username

Password

☐ Remember Me

Login

Need help with your login?

DON'T HAVE AN ACCOUNT?

Create an account

Or please contact your practice for access to the portal.

The patient will be able to select Username, Password or both to recover their credentials.

MyPatientVisit Patient Portal User Guide for IntellectPro

myPatientVisit

FORGOT LOGIN CREDENTIALS?

Please select one from below.

- ☐ Forgot Username
- ☐ Forgot Password
- ☐ Forgot Both Username & Password

*Required field

Submit Cancel

Forgot Username

When the patient selects “Forgot Username”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.

myPatientVisit

FORGOT LOGIN CREDENTIALS?

Please select one from below.

- ☒ Forgot Username
- ☐ Forgot Password
- ☐ Forgot Both Username & Password

FIRST NAME:* LAST NAME:*

Enter Enter

DATE OF BIRTH:*

mm/dd/yyyy

ZIP:*

Enter

*Required field

Submit Cancel

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).

myPatientVisit

RECOVER YOUR CREDENTIALS

In order to recover your credentials, please answer the following security questions you answered during the registration process.

Question 1:

In which state were you born?

Provide your answer

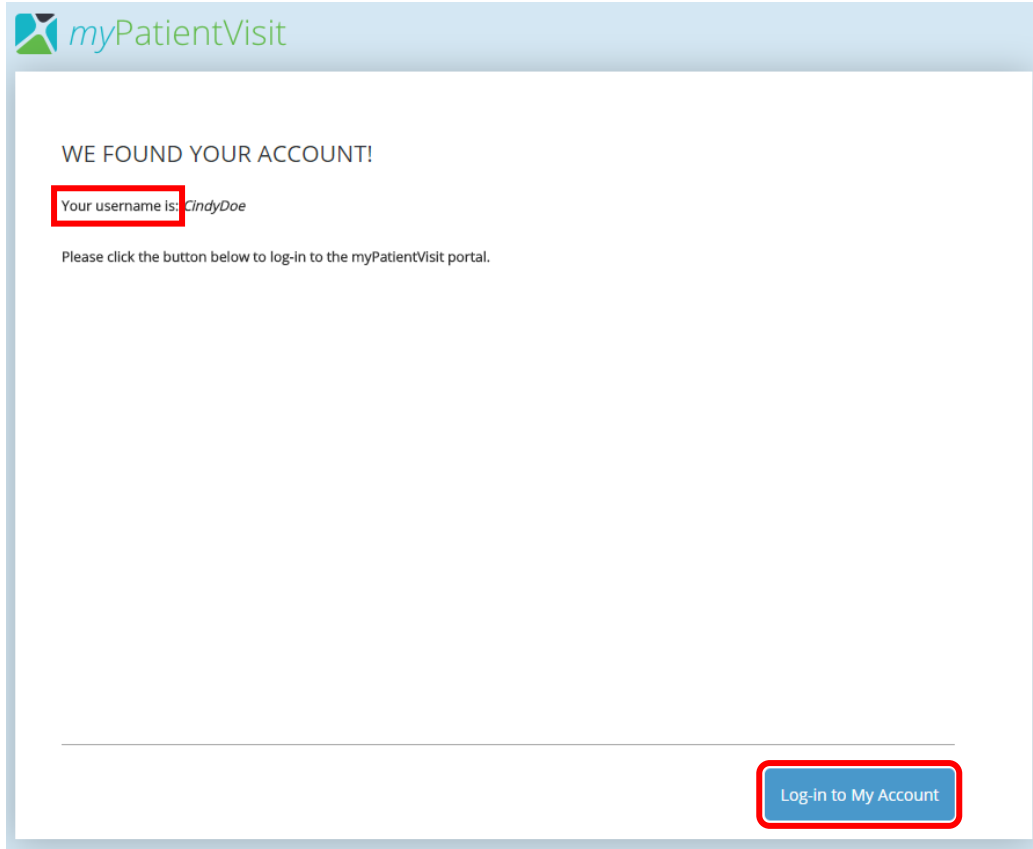
Question 2:

In which city were you born?

Provide your answer

Continue

If the correct information is entered, the patient's username will be displayed. The patient will then click on "Log-in to My Account".



The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

Forgot Password

When the patient selects "Forgot Password", they will be asked to enter their First Name, Last Name, Username, Date of Birth and Zip they used to create their login.

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FORGOT LOGIN CREDENTIALS?

Please select one from below.

☐ Forgot Username

☒ Forgot Password

☐ Forgot Both Username & Password

FIRST NAME:*

LAST NAME:*

Enter

Enter

USERNAME (LOGIN ID):*

Enter

DATE OF BIRTH:*

mm/dd/yyyy

ZIP:*

Enter

**Required field*

Submit

Cancel

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).



RECOVER YOUR CREDENTIALS

In order to recover your credentials, please answer the following security questions you answered during the registration process.

Question 1:

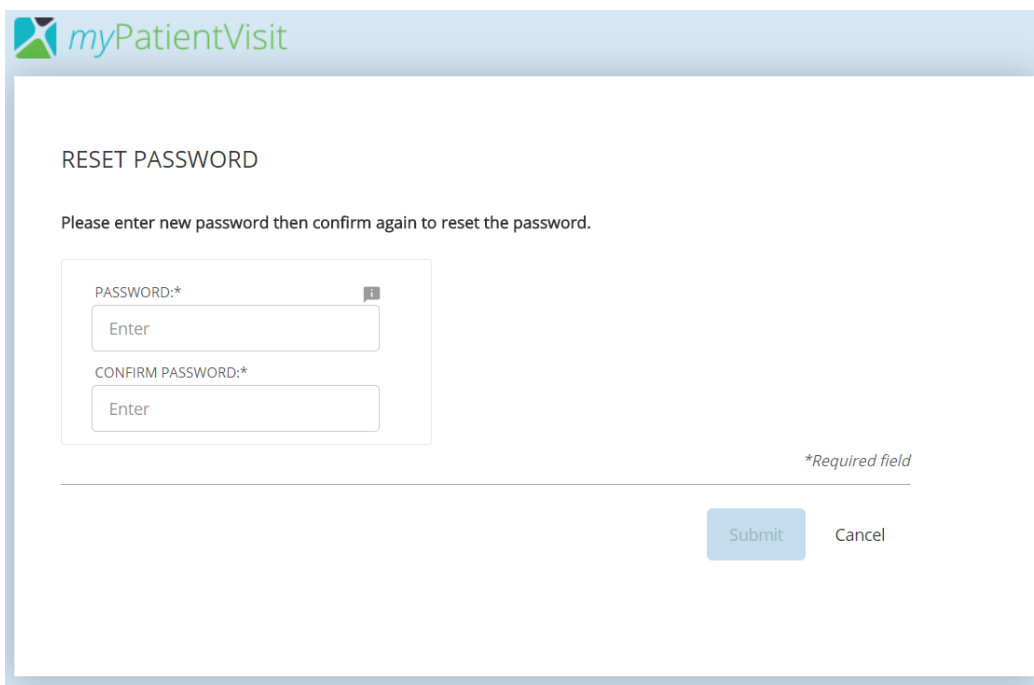
In which state were you born?

Question 2:

In which city were you born?

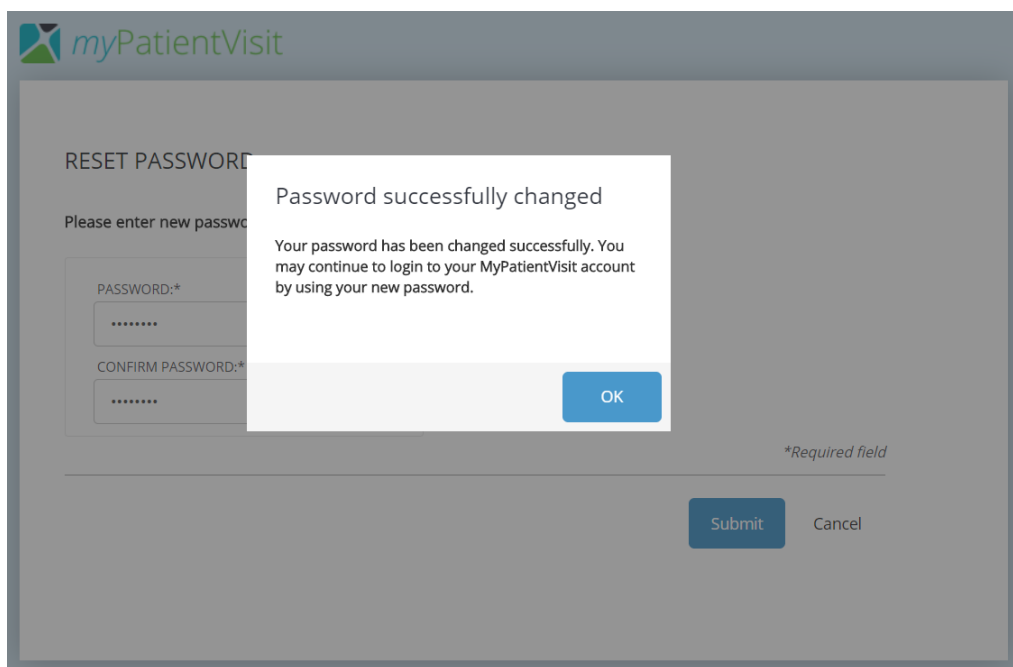
If the correct information is entered, MyPatientVisit will allow the patient to reset their password.

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The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'RESET PASSWORD' is centered. A message states: 'Please enter new password then confirm again to reset the password.' There are two input fields: 'PASSWORD:*' and 'CONFIRM PASSWORD:*', both with 'Enter' text inside. A small information icon is next to the first field. At the bottom right, there is a '*Required field' note and two buttons: 'Submit' and 'Cancel'.

The patient will get confirmation that their password was successfully changed.



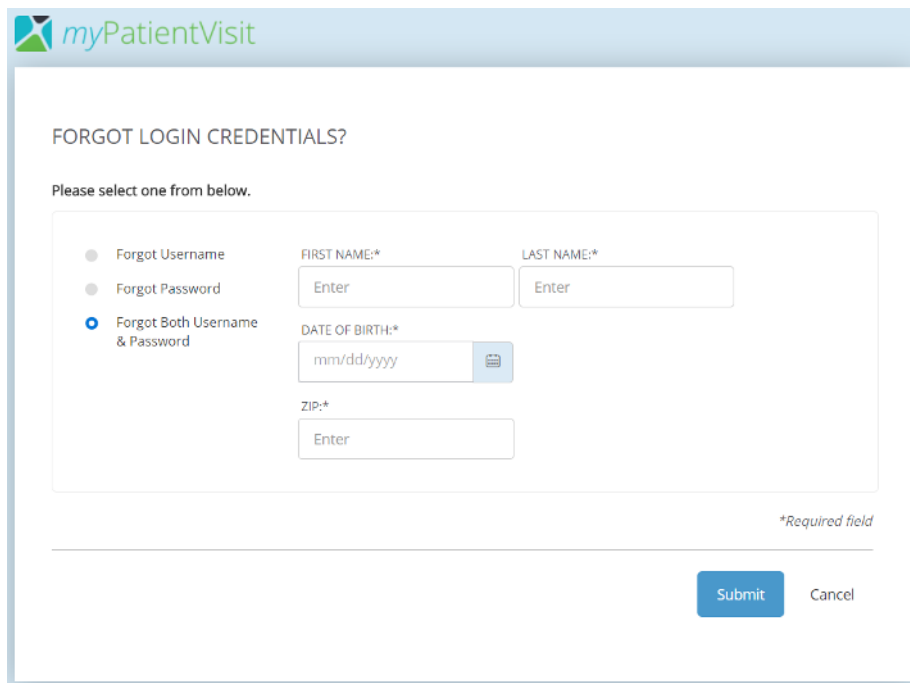
This screenshot shows the same 'RESET PASSWORD' form as above, but with a modal dialog box overlaying the center. The dialog has the title 'Password successfully changed' and the text: 'Your password has been changed successfully. You may continue to login to your MyPatientVisit account by using your new password.' There is an 'OK' button at the bottom right of the dialog. The background form is dimmed, showing the same fields and buttons as before.

The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

MyPatientVisit Patient Portal User Guide for IntellectPro

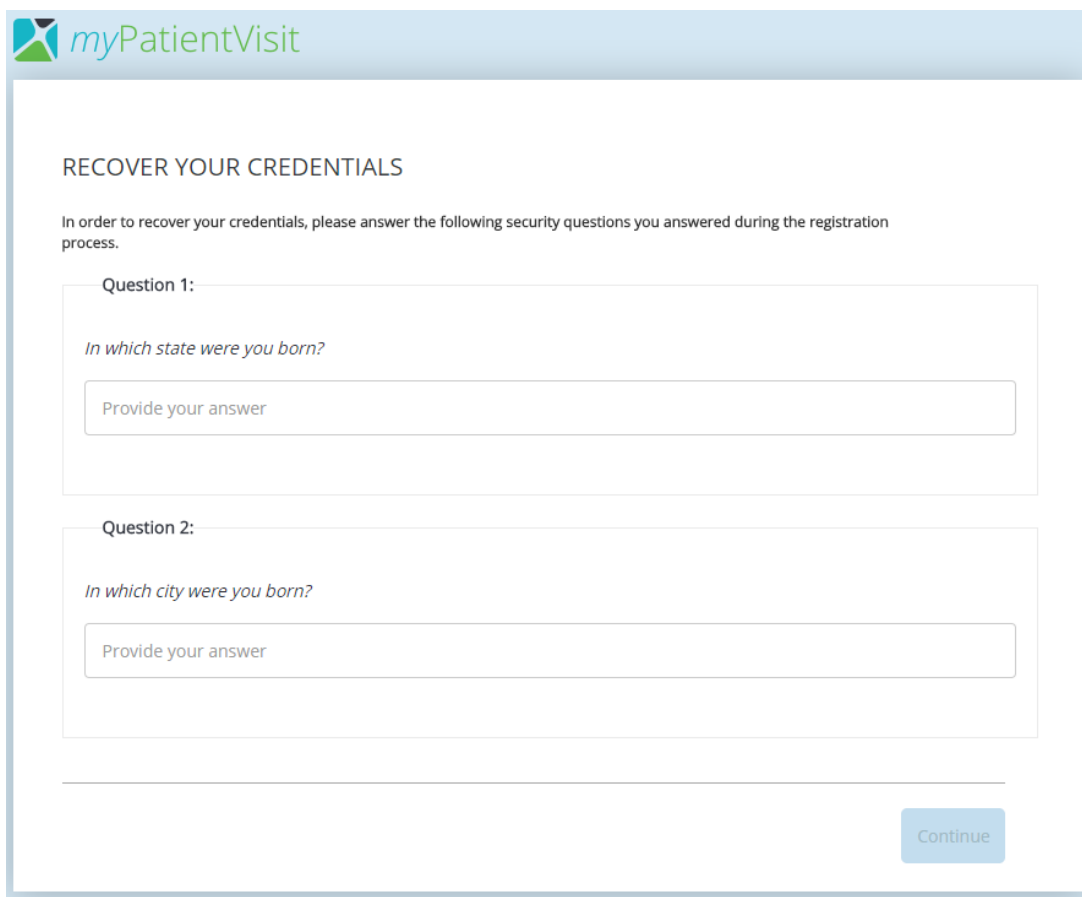
Forgot Username or Password

When the patient selects “Forgot Both Username & Password”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.



The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'FORGOT LOGIN CREDENTIALS?' is centered. Underneath, the instruction 'Please select one from below.' is followed by three radio button options: 'Forgot Username', 'Forgot Password', and 'Forgot Both Username & Password'. The third option is selected. To the right of these options are four input fields: 'FIRST NAME:*' and 'LAST NAME:*' (both with 'Enter' text), 'DATE OF BIRTH:*' (with a date picker icon and 'mm/dd/yyyy' text), and 'ZIP:*' (with 'Enter' text). A horizontal line separates the form from the bottom, where a blue 'Submit' button and a 'Cancel' link are located. A small note '*Required field' is positioned above the line.

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).



myPatientVisit

RECOVER YOUR CREDENTIALS

In order to recover your credentials, please answer the following security questions you answered during the registration process.

Question 1:

In which state were you born?

Provide your answer

Question 2:

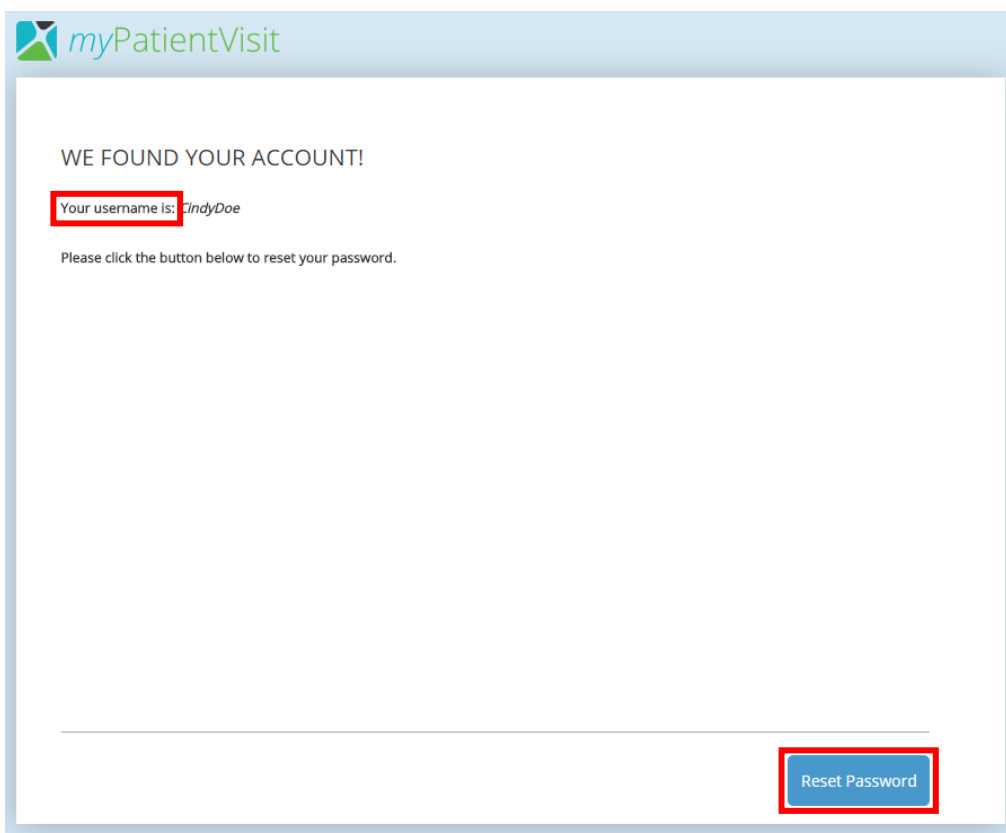
In which city were you born?

Provide your answer

Continue

If the correct information is entered, MyPatientVisit will display the patient's username. The patient will then click on "Reset Password".

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The screenshot shows the MyPatientVisit logo at the top left. Below it, the text "WE FOUND YOUR ACCOUNT!" is displayed. Underneath, a red box highlights the text "Your username is: *JIndyDoe*". Below this, the instruction "Please click the button below to reset your password." is shown. At the bottom right, a blue button labeled "Reset Password" is highlighted with a red box.

myPatientVisit

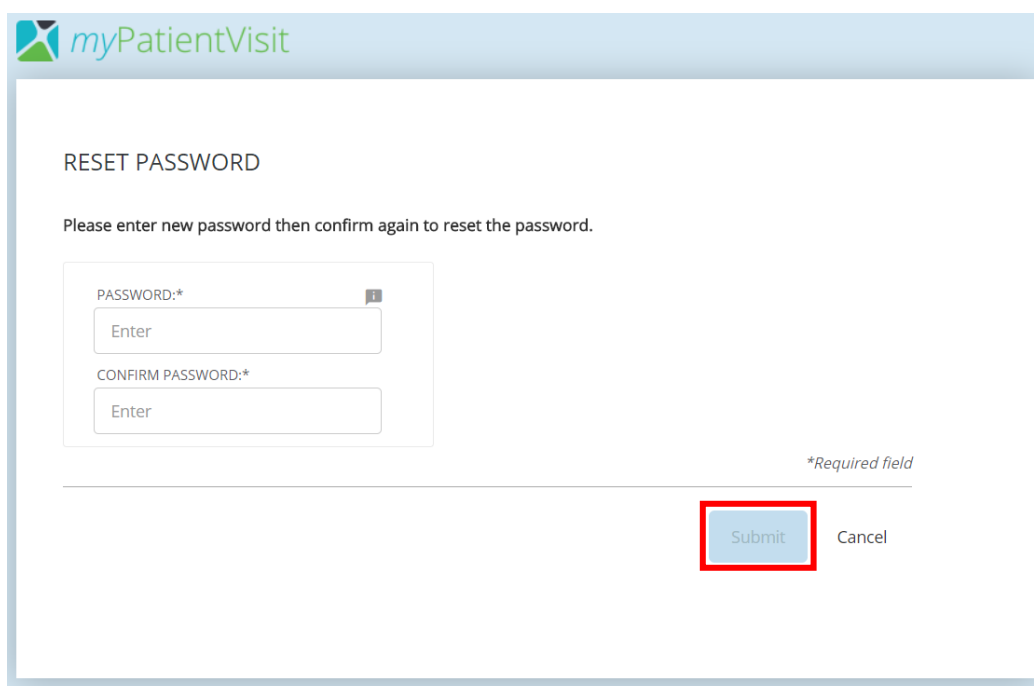
WE FOUND YOUR ACCOUNT!

Your username is: *JIndyDoe*

Please click the button below to reset your password.

Reset Password

The patient will be able to reset their password. Click on "Submit" after entering a new password.



The screenshot shows the MyPatientVisit logo at the top left. Below it, the text "RESET PASSWORD" is displayed. Underneath, the instruction "Please enter new password then confirm again to reset the password." is shown. Below this, there are two input fields: "PASSWORD:*" and "CONFIRM PASSWORD:*", each with a placeholder "Enter". A red box highlights the "Submit" button at the bottom right. To the right of the "Submit" button is a "Cancel" button. A note "*Required field" is located above the "Submit" button.

myPatientVisit

RESET PASSWORD

Please enter new password then confirm again to reset the password.

PASSWORD:*
Enter

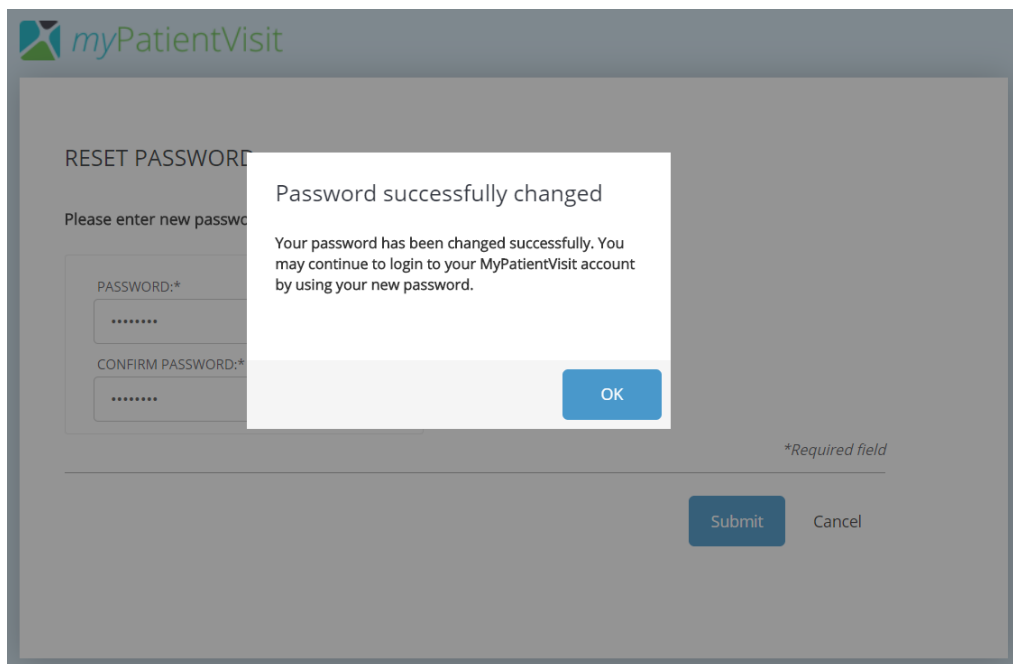
CONFIRM PASSWORD:*
Enter

*Required field

Submit Cancel

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The patient will get confirmation that their password was successfully changed.



The screenshot shows the MyPatientVisit logo at the top left. Below it, the text "RESET PASSWORD" is visible. A modal dialog box is centered on the screen with the title "Password successfully changed". The dialog contains the text: "Your password has been changed successfully. You may continue to login to your MyPatientVisit account by using your new password." and an "OK" button. In the background, the "RESET PASSWORD" form is visible, showing fields for "PASSWORD:*" and "CONFIRM PASSWORD:*" with asterisks indicating required fields. At the bottom right of the form, there are "Submit" and "Cancel" buttons. A small note "*Required field" is also visible.

The patient will then be taken to the login screen where they will enter the correct username and password to access their account.