



Patient Portal Navigation & FAQs

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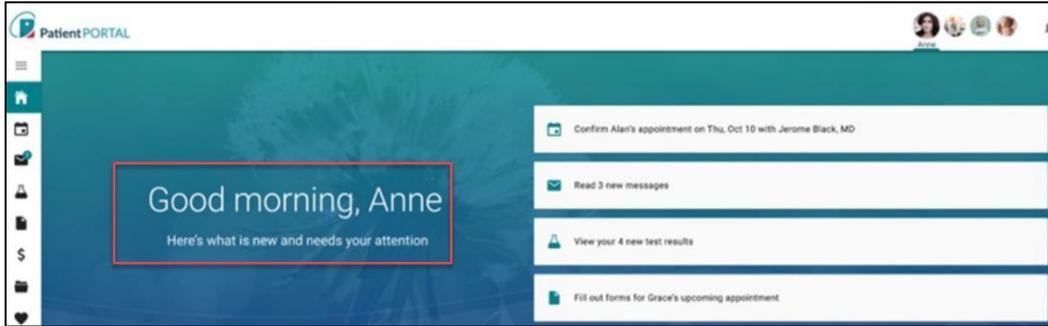
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Home Page

The home page focuses on appointments, messages, test results and forms. If you are linked to a child or dependent, the home page rolls up appointments, messages, labs, and forms for review. You can identify to whom the information applies, as the corresponding avatar is displayed in the bottom left of every card.

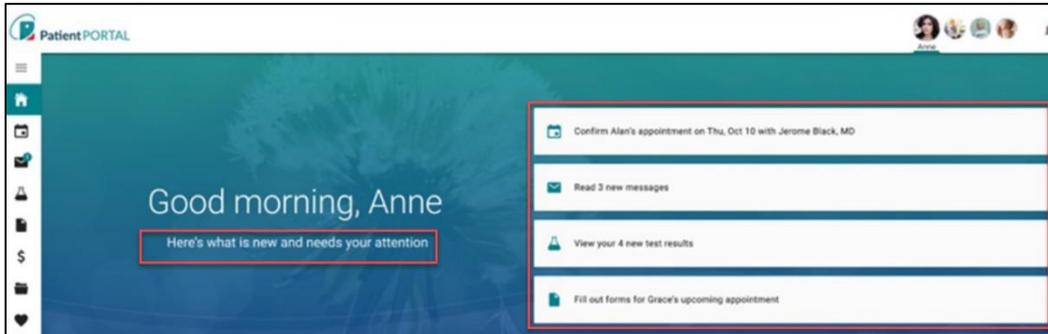
Greeting Over Image

The personalized greetings and background images change, depending on the time of day of log in.



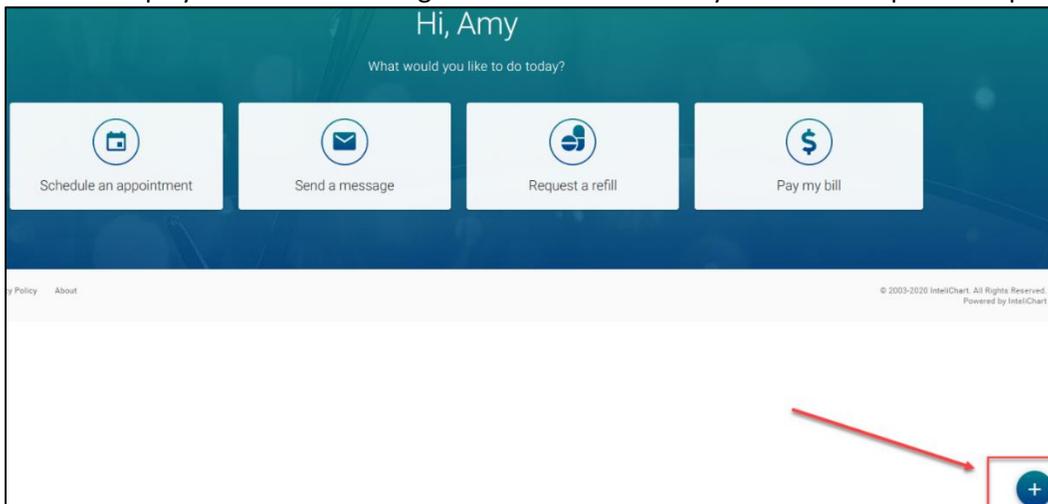
Action Tiles

The area to the right of the greeting displays rectangular "action tiles" These are items that require attention, as indicated by the message - "Here's what is new and needs your attention" - displayed under the greeting.



Floating Action Button

The floating action button is an easily accessible shortcut that allows you to do common actions in the Patient Portal. The button is displayed in the bottom right of the screen and stays anchored in position upon scroll.



When the floating action button is clicked, the button displays stacked speed dial actions:

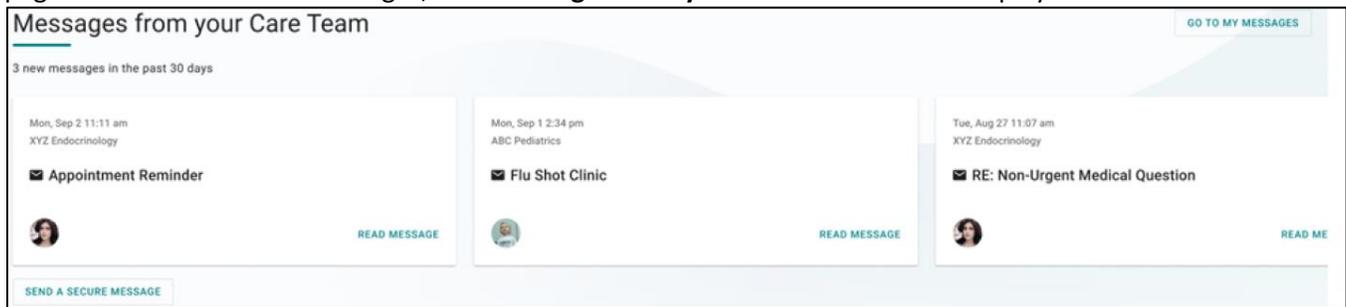
- Pay my bill: Navigates you to the bill pay page
- Request a refill: Opens request a refill workflow
- Send a message: Opens compose new message workflow
- Make an appointment: Opens make an appointment workflow



Messages

Viewing New Messages

If you or a dependent have a message, the **"Messages from your Care Team"** section appears on the home page. When there are no messages, the **"Messages from your Care Team"** is not displayed on the screen.



There may be more cards than can be seen on the screen. Here's how to view them:

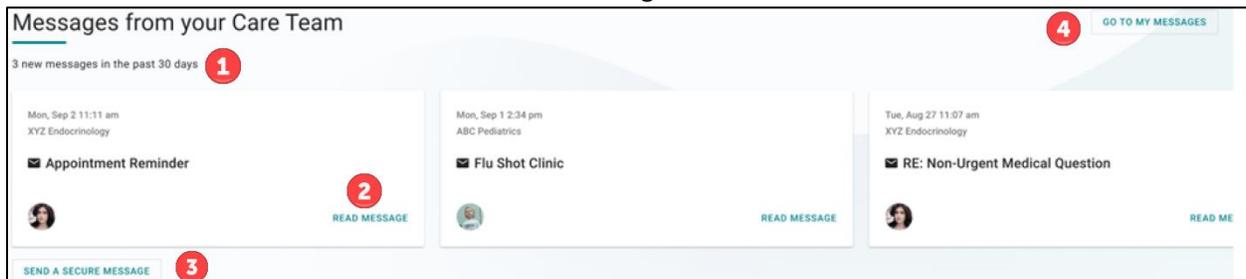
- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.



Note: A message card that has been read disappears from the homepage when you navigate away from the page.

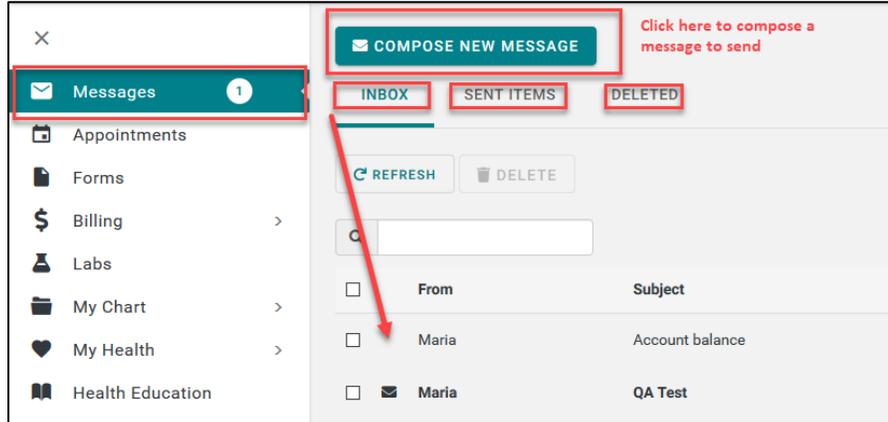
You can do the following under the **Messages from your Care Team** section:

1. Identify the total new messages
2. Read Message
3. Send a Secure Message
4. Select the **GO TO MY MESSAGES** to see all Messages



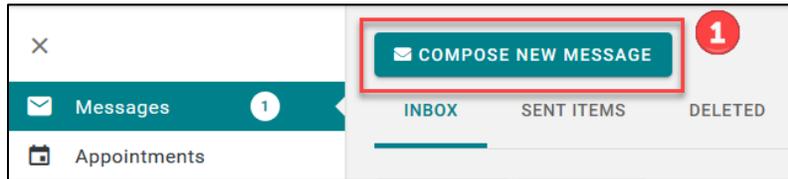
Compose New Message

The Messages Page gives you the ability to send messages to the practice/facility using the **COMPOSE NEW MESSAGE** button. The Messages Page allows you to view secure messages that are incoming messages from your care team in the **INBOX** tab. You will view outgoing messages in the **SENT ITEMS** tab. Messages that are deleted show on the **DELETED** tab.



COMPOSE NEW MESSAGE gives you the ability to send a message to your healthcare team that is in reference to a topic other than an appointment request or medication refill.

1. Click **COMPOSE NEW MESSAGE**



2. The Practice disclaimer will show at the top of the message
3. Click **On behalf of**: select who the message is on behalf of
4. Click the **Practice** drop down arrow and choose the practice from the pick list
5. Click the **Location** drop down arrow and choose the location from the pick list
6. Select who you would like the message to go **To** (based on message groups set by practice)
7. Enter the subject of the message in the **Subject** line
8. If applicable, include an attachment
9. Enter the text in the body of the message
10. Click **SEND MESSAGE**

Compose new message ×

Please note that you can expect to receive a response within 24 hours. 2

On behalf of: Billy boy test 3

Practice: Ballantyne Family Office 4

Location: Ballantyne Commons-IC Test 5

To: Clinical Team 6

Subject: Request for nurse to call 7

8

B I U 9

My son has a rash on his leg and I would like to know if I should bring him in. 9

Characters: 921 10

CLOSE SEND MESSAGE

Proxy Associated (Child/ Dependent) Accounts

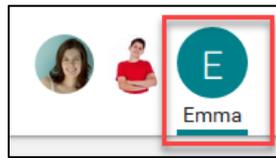


Please note, parents and guardians will not have access to a minor’s Patient Portal between the ages of 13-17 due to Washington State confidentiality rules. Thank you for your understanding!

A Proxy User will display on the Patient Portal **My Account** page in the **Associated Accounts** section. You can remove a Proxy by clicking **Remove association**.

Associated accounts		Add a proxy account Add a child or dependent account	
Name	Associations	Type	Actions
stella Test		My Proxy	Remove association

The Proxy User can access the Patient Portal account for the person that you are a proxy for by selecting the individual at the right top of the page. A green line under the name indicates what account you are viewing.



You can also establish Proxy access from the Portal **My Account** page in the **Associated Accounts** section by clicking the **Add a Proxy Account** link.

Associated accounts		Add a proxy account Add a child or dependent account	
Name	Associations	Type	Actions

When you click the **SUBMIT** button the same process previously discussed will allow the Proxy User to get an email to accept and verify the proxy access.

Proxy Authorization Form

Proxy authorization allows you to grant permission to an individual who is 18 years of age or older to securely communicate on your behalf. In order for a proxy to obtain access, you must complete the Proxy Authorization Form.

You can terminate proxy access via written or online request, or you can revoke access within your online account. To only allow access for a specific time range, you may enter an effective date in the field provided below.

Add Proxy User Information

Proxy Information

First Name Last Name

Gender Male Female

Date of Birth Month Day Year

Cell Phone This number will be used for account security. Message and data rates may apply.

Email

Relationship

Proxy End Date OPTIONAL

I have read and understood the Authorization Individual Acceptance [Terms and Conditions](#) for allowing access to my online account information and agree to abide by these requirements. I certify that all the information I have provided is correct. I hereby request access for my online account.



Note: Proxy invitation links not accessed within 48 hours will expire.

Labs



On April 5, 2021, the 21st Century Cures Act began requiring healthcare providers to give patients access to all health information without delay. This means that you are able to see all of lab tests in the Patient Portal, often before your healthcare provider has the chance to see them. While some people are happy to see results immediately, others may be uncomfortable or anxious seeing results before a provider can interpret and explain them.

Here are some considerations when looking at results in the patient portal:

- Be aware that you may see results that are difficult to understand or indicative of serious illness. For that reason, you may want to wait to learn your results until your provider contacts you.
- If you are concerned about test results, consider NOT looking at the portal on a Friday. It can be frustrating to view results on a Friday afternoon because you will likely not be able to contact your provider with questions until Monday. This can make for a weekend filled with anxiety.
- Be aware that not all results marked as “abnormal” are of clinical concern.

The law is all about ensuring that you have timely access to your medical results. While this is positive, you may want to be thoughtful about when you access those results in your portal.

If you or a dependent have a new lab result, the **Your results are in** section appears on the home page. When there are no new lab results, the "Your results are in" is not displayed on the screen.

There may be more cards than can be seen on the screen. Here’s how to view them:

- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.



Note: Labs are considered viewed and removed from the home page when your session ends, or you log out.

You can do the following under the **Your results are in** section:

1. Identify the total new lab results
2. Identify results that are outside the normal range, the value is displayed in orange font
3. Select the **GO TO MY LABS** to see all Lab results

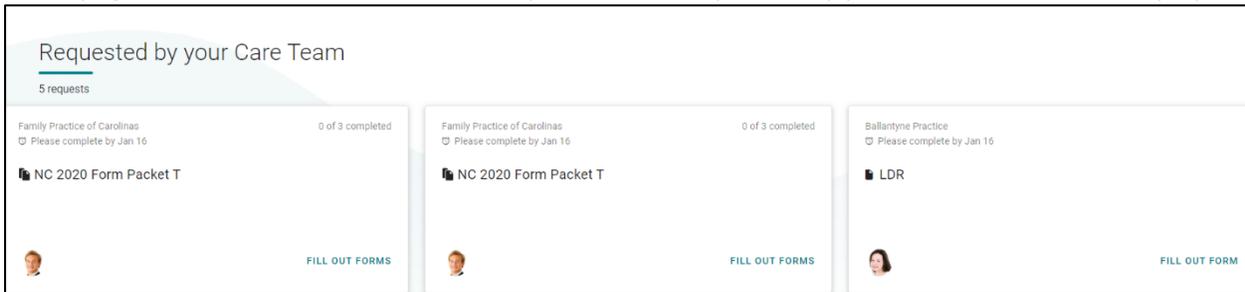
More on reading your lab results:

- The bar graph has two colors – green for normal reference range and orange for outside the reference range.
- A small black vertical line represents your current value
- If the lab result is higher than reference range, the black line is on the right.
- If the lab result is lower than reference range, the black line is on the left.
- If the lab result falls inside the normal reference range, the line is at the actual value.

Forms

Forms-Requested by your Care Team

If you or a dependent has a pending form to complete, the **Requested by your Care Team** section appears on the home page. When no forms need to be completed, the "Requested by your Care Team" is not displayed.

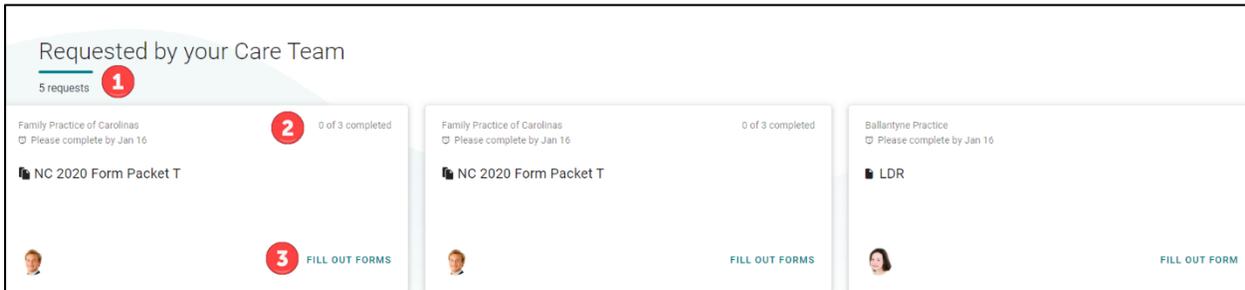


There may be more cards than can be seen on the screen. Here's how to view them:

- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.

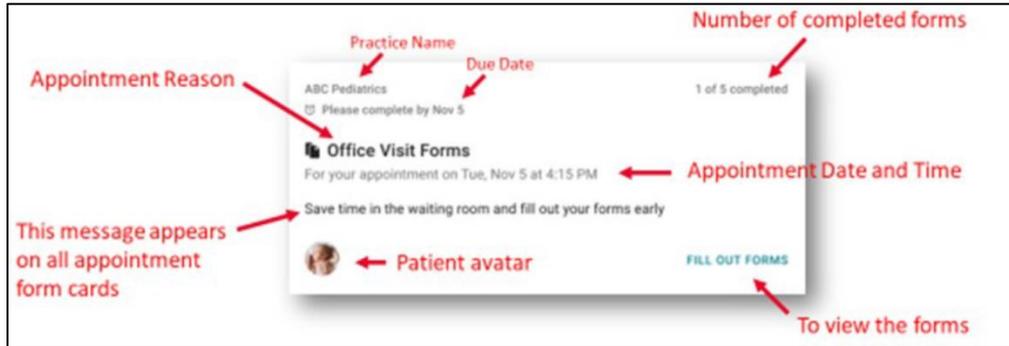
You can do the following under the **Requested by your Care Team** section:

1. Identify the total requests
2. Identify total of forms completed in a packet
3. FILL OUT FORMS

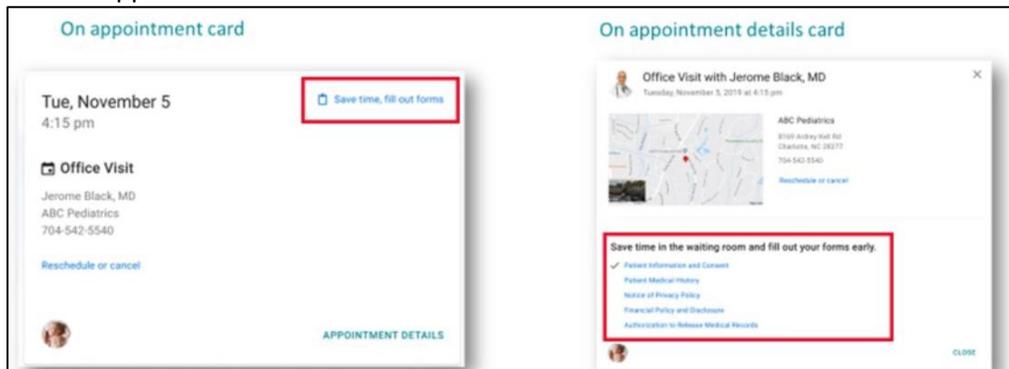


Appointment Form Card

Forms that pertain to an appointment are consolidated into one appointment form card. The card is no longer displayed when the appointment date has passed, or all forms have been completed.



Other ways to access appointment forms:



Fill Out Forms

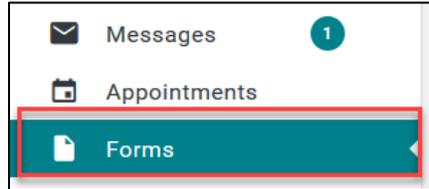
When you select **FILL OUT FORMS**, you will be directed to a screen to complete their forms. The screen will provide the following details.

1. The appointment date and time.
2. A **Please complete by** date with a clock icon. As forms are being completed, the due date and clock icon appear for each. If there is no official due date, the clock will not appear.
3. The number of forms completed in packet, which updates with each form completed.
4. The **Form** column shows the title of each form to be completed.
5. The **Status** column indicates if the form is Not started, In progress, or Completed.
6. The third column contains buttons to either **FILL OUT THE FORM** or **VIEW FORM**.

The screenshot shows the 'Appointment Forms' screen for an appointment on 'Mon, Sep 23 at 10:00 AM'. It includes a due date 'Please complete by Mon, Sep 23' and a progress indicator '1 of 5 forms have been completed'. Below is a table of forms to be completed:

Form	Status	Action
✓ Patient Information and Consent	Completed	VIEW FORM
Patient Medical History	In progress	FILL OUT FORM
Notice of Privacy Policy	Not started	FILL OUT FORM
Financial Policy and Disclosure	Not started	FILL OUT FORM
Authorization to Release Medical Records	Not started	FILL OUT FORM

You can also access and print forms by selecting **Forms** in the left-hand navigation. There will be interactive forms that can be completed online and submitted to the practice and static forms that can be printed off and completed at any time.



You will have access to view any pending, completed, and available forms.

Insurance

Insurance policies can be viewed by using the left-hand navigation and selecting **Insurance** under the header **Billing**.



You can also send a message to report any changes or problems by clicking **Report a problem with this policy**.

Insurance on file for Amy testing name change ICTest

Aetna				
Name on Card	Amy ICTest	Policy Number	123456789	Plan Number
Copay Amount	\$0.00	Effective Date	11/1/2017	Expiration Date
Group Number		Phone Number	(888) 632-3862	

Click this link to send a message related to changes or issues with insurance coverage

Report a problem with this policy.

My Chart

My Chart-Chart Summary

The **Chart Summary** page provides an overview of Demographics, Lab Tests, Histories, Allergies, Visits, Medications, Immunizations, Problems, Vitals and Allergies. The most recent 5 records will display on each widget. To see any health record in more detail, click on the widget title or click on respective tab.

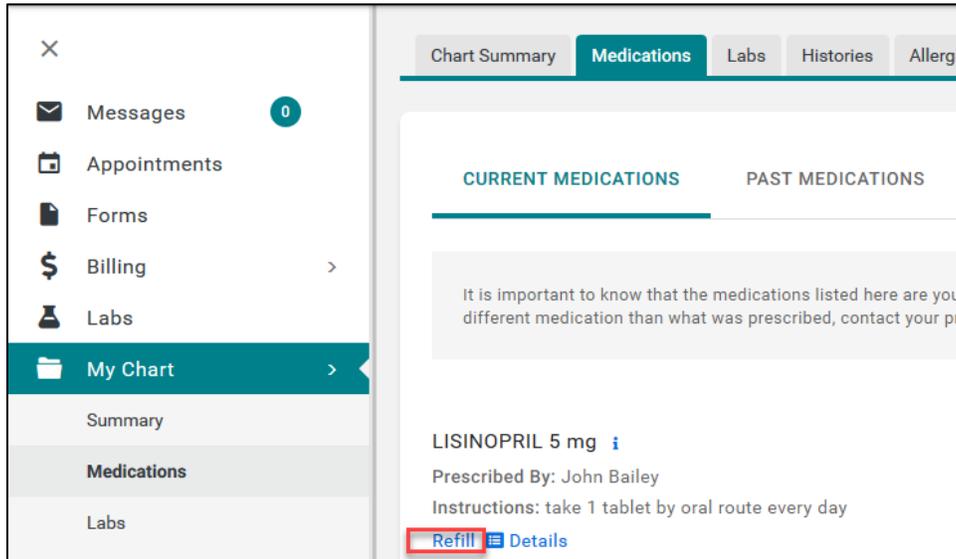
Demographics

Address	888 Test FORT MILL, SC 29707	Emergency Contact	
Home Phone	(123) 555-0100	Name	
Mobile Phone		Phone	
Birthdate	12/25/1968 Age: 51	Relationship	
Preferred Language		Work Phone	
Race		Prior Last Name	
		Ethnicity	

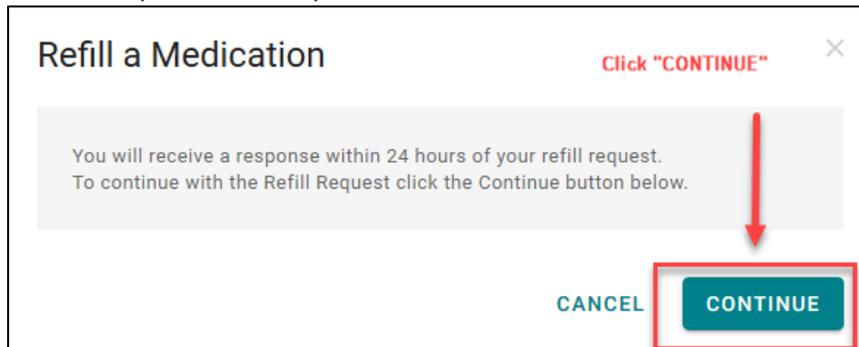
Gender: M

Request a Medication Refill

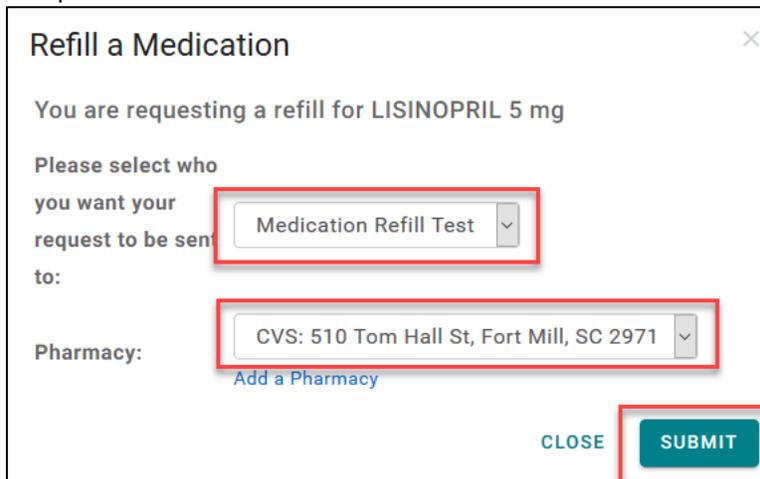
A request for a medication refill can be made only on active medications prescribed by your provider(s). Click **Refill** under My Chart>Medications tab.



You will be presented with the practice/facility's Medication Refill disclaimer.



Select who the request will be sent to (medication refill groups from practice/facility). Select a **Pharmacy** from the picklist and then click **SUBMIT**.



Add a Pharmacy

By adding a pharmacy, you can save pharmacies to use for medication refill request. Click **Add a pharmacy**

Pharmacies

Search:

Show 10 entries

Name	Address	Phone	
CVS	510 Tom Hall St, Fort Mill, SC 29715, USA	(803) 547-5586	Remove Edit

Showing 1 to 1 of 1 entries

Previous 1 Next

You will be presented with **Add a Pharmacy** pop-up. Pharmacies can be added by searching for a pharmacy or manually adding a pharmacy.

Add a Pharmacy:

1. Search for pharmacy using **Search term** (type pharmacy name)
2. Enter Zip in the **Location** field
3. Click SEARCH PHARMACIES
4. Click **Save this location** to add the pharmacy

Add a Pharmacy

SEARCH FOR PHARMACIES MANUALLY ADD A PHARMACY

1 Search term *Enter the Pharmacy name*

Walmart

e.g. Walgreens or CVS

2 Location *Zip Code displays from patient address. Patient can enter a different zip code, if needed.*

29715

By default we use your Zip Code on file. You may enter in anything you want here.

3 **SEARCH PHARMACIES** *Click "SEARCH PHARMACIES"*

4 **Save this location** *Click "Save this location" to add the pharmacy*

1 Walmart Pharmacy
500 North Dobys Bridge Road,
Fort Mill, SC 29715, USA

Save this location

Your pharmacy was saved successfully displays.

1 Walmart Pharmacy
500 North Dobys Bridge Road,
Fort Mill, SC 29715, USA

Your pharmacy was saved successfully.

Manually Add a Pharmacy

1. Click MANUALLY ADD A PHARMACY
2. Provide as much data as possible
3. Click **SAVE** to add the pharmacy

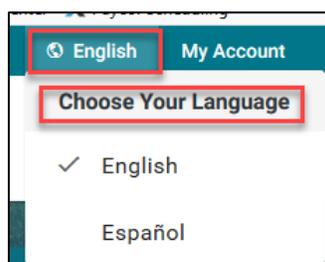
The screenshot shows a modal window titled "Add a Pharmacy". At the top, there is a search bar and a button labeled "MANUALLY ADD A PHARMACY" (callout 1). Below this are input fields for "Name", "Phone", and "Website (optional)". The "Address" section includes a note "All of the following fields are optional." and fields for "Address Line 1", "Address Line 2", "City", "State", and "Zip". A checkbox labeled "Preferred Pharmacy" with the text "Would you like to make this your preferred pharmacy?" is present (callout 2). At the bottom right, there are "CANCEL" and "SAVE" buttons (callout 3).

The Pharmacy is now listed under the Pharmacies. You can also search for a pharmacy in the practice's location and then save it to the pharmacy list. To make changes to the pharmacy information, click **Edit**. To remove pharmacy, click **Remove**.

Pharmacies				Add a pharmacy
Name	Address	Phone		
Walmart Pharmacy	500 North Dobys Bridge Road, Fort Mill, SC 29715, USA	(803) 228-6130	Remove	Edit

Language Selector (Español)

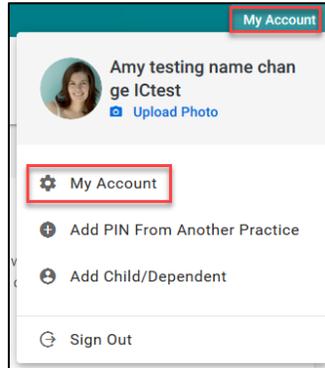
You can select English or Español for the Patient Portal account by selecting the language drop-down on the top right of the Patient Portal home page. If you select Español, a modal appears with a disclaimer that states the following in Spanish.



My Account

Change Password

Through the **My Account** page, you can change their email and/or Password and view and add any Associated Practices. The **My Account** page allows you to adjust login settings and notifications.



- Click the **(Change)** link to the right of the email address to change the login email address

My Patient Portal Account

Email address trainicportalmmary+30@gmail.com **(Change)**

[Change password](#)

[Change security question](#)

[Add PIN from another practice](#)

Associated practices Ballantyne Family Office

- Click **Change password** to change the password

My Patient Portal Account

Email address trainicportalmmary+30@gmail.com **(Change)**

Change password

[Change security question](#)

[Add PIN from another practice](#)

Associated practices Ballantyne Family Office

Change Security Question

- When you select **Change Security Question**, a modal will display **Change security question**.

My Patient Portal Account

Email address: trainicportalmary+30@gmail.com (Change)

Change password

Change security question

Add PIN from another practice

Associated practices: Ballantyne Family Office

- You will be prompted to select a new **Security Question**, **Security Answer** and **Current Password**.

Change security question

Security Question: Select a Security Question

For your protection, this will help us identify you in the future.

Security Answer: [Text Input]

Current password: [Text Input]

CLOSE UPDATE

Notifications

On the My Account page the Patient Portal allows you to set up notifications and reminders.

- Scroll down the My Account page to the **Notifications** section

You do not have to enter a separate **Notification** email address. The email used for their login will be used

- You may adjust notifications by clicking **Edit notification settings** and add their cellular number for text messages

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by: Text

Mobile: (123) 555-0100 **Edit notification settings**

Notification Event	Delivery Method	Details	Actions
Appointment Reminder	Text Message	2 days before	Delete notification
Cancel Appointment	Text Message		Delete notification

Edit notification settings window displays.

- Mobile** number for text message Notifications can be changed
- To change text message Notifications a cell service **Carrier** will be selected
- Click SAVE NOTIFICATION SETTINGS

Edit notification settings

Mobile:

Carrier:

[CLOSE](#)
[SAVE NOTIFICATION SETTINGS](#)

You can add Notifications that are sent by clicking the **Add a Notification** link.

- You will select the **Notification Event** from the dropdown
- The **Delivery Type** will be selected (text, email, or both)
- SAVE NOTIFICATION** will create the notification in the Patient Portal for you

Add Notification

Notification Event:

Delivery Type:

[CLOSE](#)
[SAVE NOTIFICATION](#)

You can delete notification in the Patient Portal by clicking the **Delete notification** link.

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by:

Mobile: (123) 555-0100 [Edit notification settings](#) [Add a notification](#)

Notification Event	Delivery Method	Details	Actions
Appointment Reminder	Text Message	2 days before	Delete notification
Cancel Appointment	Text Message		Delete notification

By selecting the drop down for **Send my Patient Portal Notifications by**, you can also provide a Preferred Contact Method for messages being sent from the practice/facility for other notifications that are sent in addition to the notifications listed in this section.,

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by: ↗

Mobile: (123) 555-0100 [Edit notification](#) [Add a notification](#)

Notification Event	Delivery Method	Details	Actions