

Patient Portal User Guide

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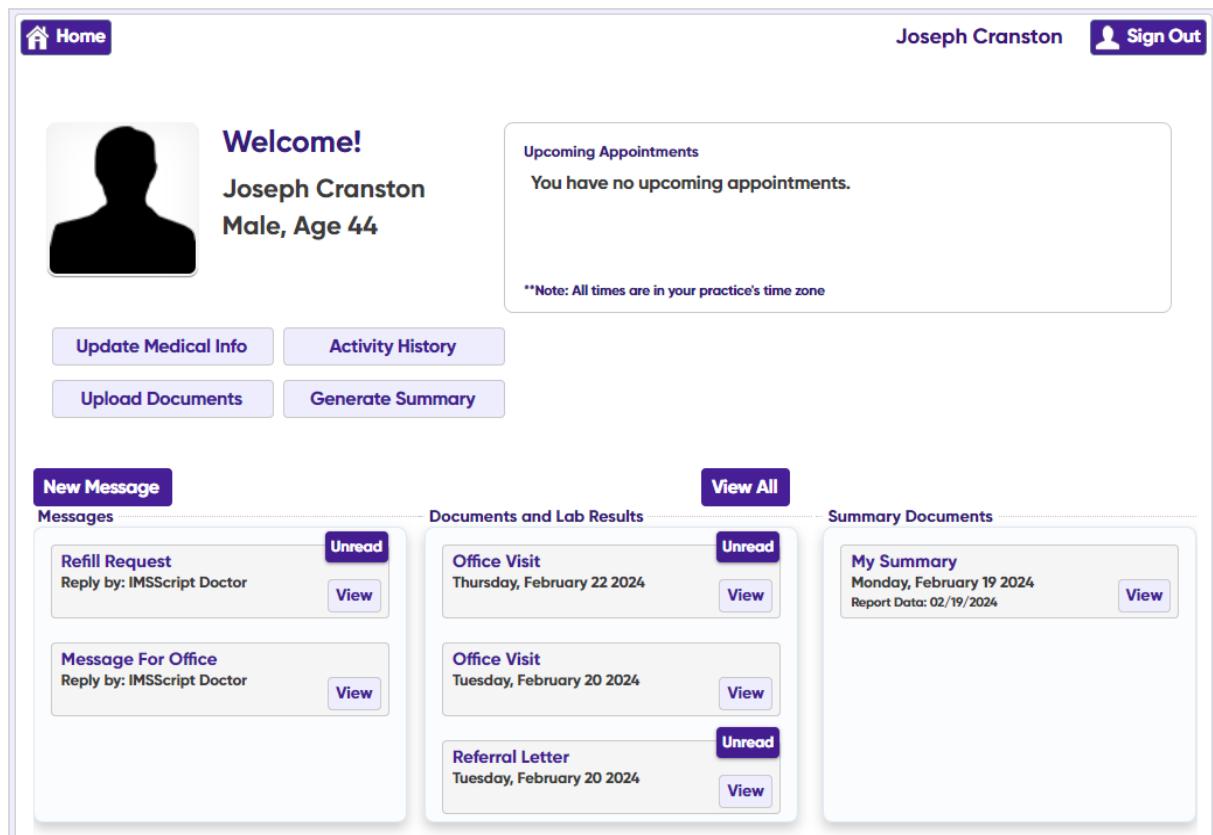
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Welcome to Your Patient Portal

From your portal, you can review and update your medical information, send secure messages to your practice, and review personal health documents like lab results and clinical summaries of recent office visits. We hope you find the information in this User Guide helpful.

Home page features



The screenshot shows the Home page of a patient portal. At the top, there is a navigation bar with a 'Home' icon, the user's name 'Joseph Cranston', and a 'Sign Out' button. Below the navigation bar, there is a profile section featuring a placeholder image of a person, the text 'Welcome!', the user's name 'Joseph Cranston', and their age 'Male, Age 44'. To the right of this section is a box titled 'Upcoming Appointments' which states 'You have no upcoming appointments.' and includes a note: '**Note: All times are in your practice's time zone'. Below the profile section are four buttons: 'Update Medical Info', 'Activity History', 'Upload Documents', and 'Generate Summary'. The main content area is divided into three sections: 'New Message', 'Documents and Lab Results', and 'Summary Documents'. The 'New Message' section shows two messages: 'Refill Request' (Reply by: IMSScript Doctor) and 'Message For Office' (Reply by: IMSScript Doctor). The 'Documents and Lab Results' section shows three items: 'Office Visit' (Thursday, February 22 2024), 'Office Visit' (Tuesday, February 20 2024), and 'Referral Letter' (Tuesday, February 20 2024). The 'View All' button is located above the 'Documents and Lab Results' section. The 'Summary Documents' section shows one item: 'My Summary' (Monday, February 19 2024, Report Data: 02/19/2024). The 'View' button is located to the right of this summary.

The **Home** page is the gateway to your portal. From your **Home** page, you can:

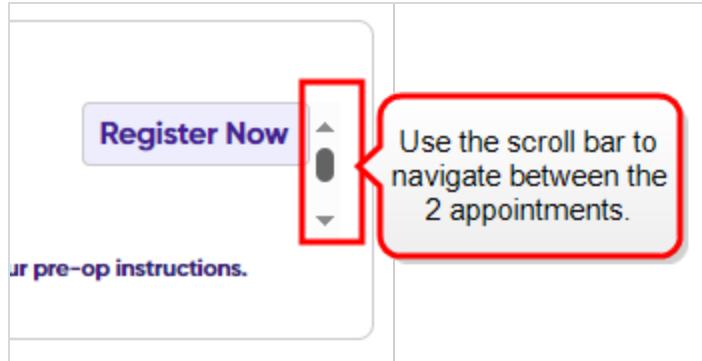
- [View appointments](#) you have scheduled in the next two weeks, and register in advance to save time at the office
- Update your [medical information](#) and send it to your provider's office.
- View a list of your [portal activity](#) for documents and labs.
- [Upload documents and URLs](#) for your provider.
- Generate a [summary of your patient information](#) to print or share with another provider.
- [Send non-urgent messages](#) to your provider's office.
- [Review documents and lab results](#) sent to the portal from your provider.



If you're using the Patient Portal on a mobile phone, see [Saving the Patient Portal on your phone](#) and [Uploading photos to the Patient Portal](#).

Upcoming appointments

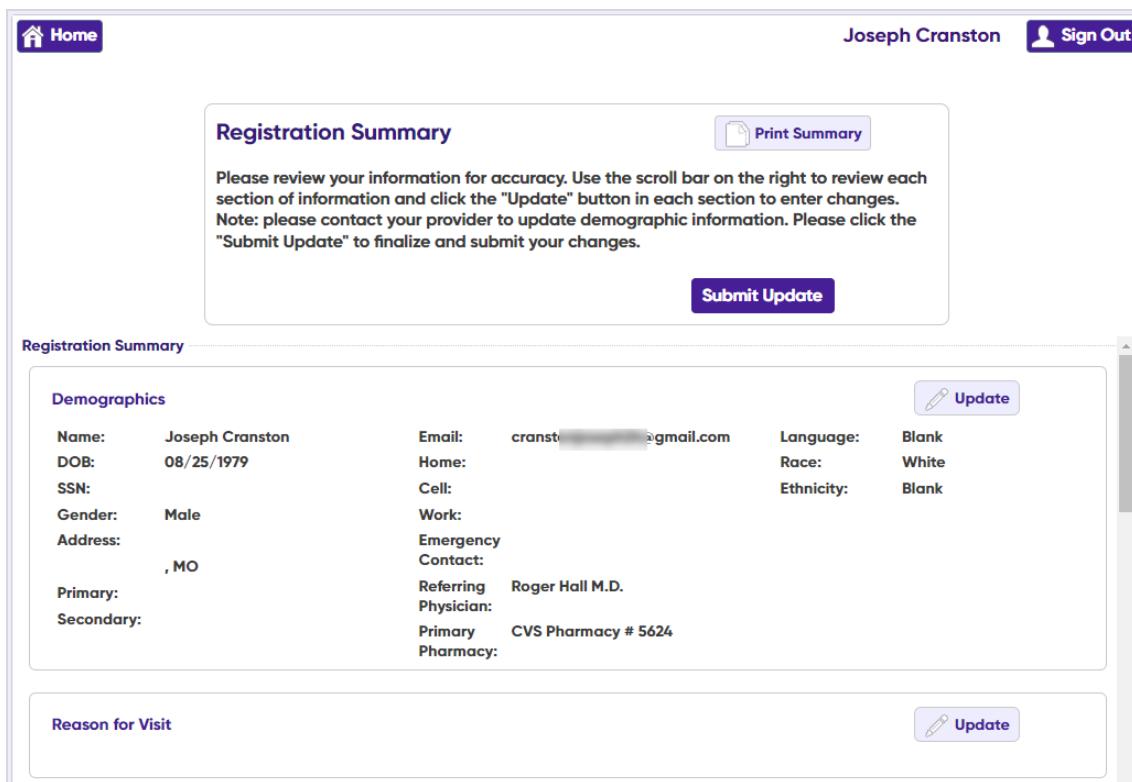
In the **Upcoming Appointments** area of the **Home** page, your next two appointments with your provider display. If necessary, use the gray scroll bar to navigate up and down to view the details of these two appointments.



Registering for your next appointment

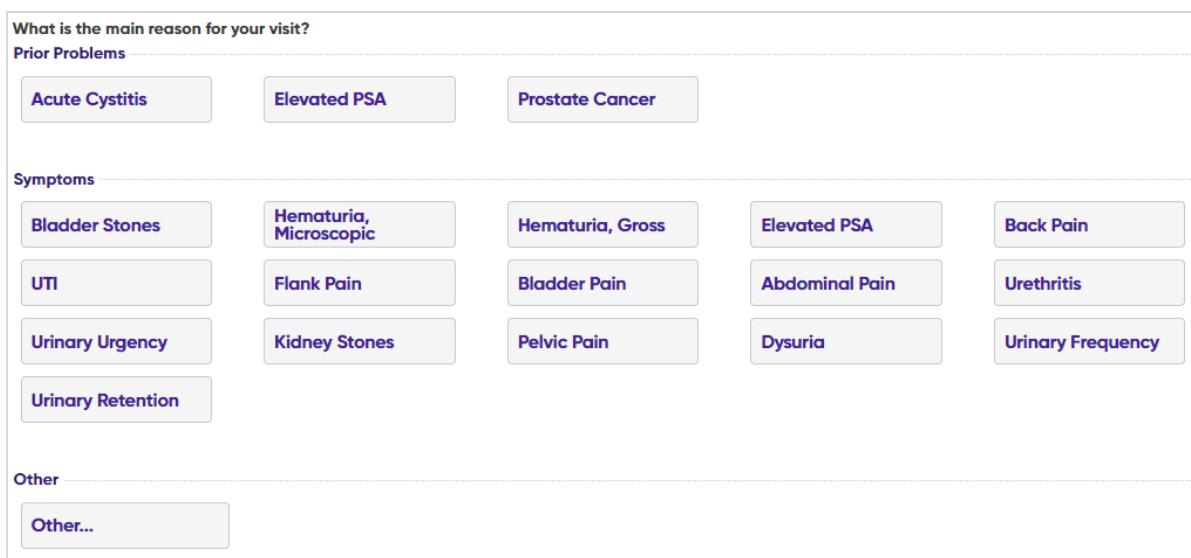
If your provider's office wants you to register for certain types of upcoming appointments, follow the steps below:

1. Select **Register Now** . The **Registration Summary** page opens.



The screenshot shows the 'Registration Summary' page. At the top, there are 'Home', 'Joseph Cranston', and 'Sign Out' buttons. Below that is a 'Print Summary' button and a 'Submit Update' button. The main content area is titled 'Registration Summary' and contains a note: 'Please review your information for accuracy. Use the scroll bar on the right to review each section of information and click the "Update" button in each section to enter changes. Note: please contact your provider to update demographic information. Please click the "Submit Update" to finalize and submit your changes.' Below this is a 'Demographics' section with fields for Name, DOB, SSN, Gender, Address, Primary, Secondary, Email, Home, Cell, Work, Emergency Contact, Referring Physician, and Primary Pharmacy. There is an 'Update' button next to the demographic table. Below the demographics is a 'Reason for Visit' section with an 'Update' button.

2. Scroll down to **Reason for Visit** and select **Update** .
3. On the **Reason for Visit** page, select an option under **Prior Problems**, **Symptoms**, or select **Other** and enter another reason in the window that opens.
4. Select **OK** .



The screenshot shows the 'Reason for Visit' page. It asks 'What is the main reason for your visit?' and lists 'Prior Problems' (Acute Cystitis, Elevated PSA, Prostate Cancer), 'Symptoms' (Bladder Stones, Hematuria, Microscopic, Hematuria, Gross, Elevated PSA, Back Pain, UTI, Flank Pain, Bladder Pain, Abdominal Pain, Urethritis, Urinary Urgency, Kidney Stones, Pelvic Pain, Dysuria, Urinary Frequency, Urinary Retention), and an 'Other' section with an 'Other...' button.

Other Reason for Visit

Please describe below the reason for your visit.

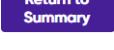
Description *

Enter the reason for your visit, and then select **OK**.

OK **Cancel**

5. Select any of the other areas to update your information. See [Updating your information](#).



6. When you finish any updates, select **Return to Summary** .
7. Select **Submit Update** .
8. Register Now  no longer displays beside your appointment.

To print a summary of your medical information, use **Print Summary**  to send the information to your printer.

Updating your information

Use **Update Medical Info**  on the **Home** page to view or change your personal health information.

When the **Medical Information Summary** page opens, select **Update**  beside the area you want to view or change.

Medical Information Summary[Print Summary](#)

Please review your information for accuracy. Use the scroll bar on the right to review each section of information and click the "Update" button in each section to enter changes.
Note: please contact your provider to update demographic information. Please click the "Submit Update" to finalize and submit your changes.

[Submit Update](#)**Medical Information Summary****Demographics**

Name: Joseph Cranston Email: cransto...@gmail.com Language: Blank
DOB: 08/25/1979 Home: Race: White
SSN: Cell: Ethnicity: Blank
Gender: Male Work: Emergency
Address: , MO Contact:
Primary: Referring Physician: Roger Hall M.D.
Secondary: Primary Pharmacy: CVS Pharmacy # 5624

Select **Update** beside the area you want to review or change.

[Update](#)

Use the scroll bar to navigate up and down to see other areas to update.

Allergies

Amoxicillin Hives, Insomnia, Vomiting Since January 1985
Penicillin

[Update](#)

When you open an area to update, you can return to the **Medical Information Summary** page by selecting **Return to Summary**.

[Return to Summary](#)

Joseph Cranston

[Sign Out](#)[Help](#)[Home](#)[1 Demographics](#)[2 Allergies](#)[3 Medications](#)[4 Procedures](#)[5 Conditions](#)[6 Family Conditions](#)[7 Social History](#)

Select **Return to Summary** at any time to return to the **Medical Information Summary** page.

[Return to Summary](#)

Enter all of your allergies. Examples: Demerol, Penicillin, Latex, etc.
Current Allergies (Select Allergy to Modify)

[Add an Allergy](#) Type here to search[X](#)[Open](#)

No listed reactions
Started: unknown

[Update](#)[Remove](#)

No listed reactions
Started: unknown

[Update](#)[Remove](#)

Updating demographics

In the **Demographics** area, you can only update the pharmacy information.



Please contact your physician's office to change any other demographics information.

Review your referring provider and primary pharmacy information. Note: only the pharmacy can be updated via the patient portal.

Medical

Referring Physician

Primary Pharmacy

Type here to search Open

You can only update the Primary Pharmacy.

Contact your provider's office to update demographic information (i.e. name, address, email address, phone, etc.)

General

First Name *	Middle Name	Last Name *	Email Address (required to access your information outside our office)
Joseph		Cranston	cro...@gmail.com
Date of Birth *	SSN	Gender *	Home Phone Cell Phone Work Phone
08/25/1979		Male	
Race	Language	Ethnicity	
White		Choose...	
Consent for 3rd party portal * Yes <input type="button" value="?"/> Your MRN <input type="button" value="?"/> You may need this to request data from 3rd party portal.			

1. In the Primary Pharmacy field, enter the name or first few letters of the pharmacy, and then select Open . If a name exists, the list in the Pharmacy window populates.

Pharmacy

Find a Pharmacy 

Current Pharmacy
CVS Pharmacy # 5624
4149 N OAK TRAFFICWAY, KANSAS CITY MO
816-453-2627

Select a pharmacy.

CVS Caremark Inc ... 9501 E Shea Blvd	Scottsdale, AZ	877-864-7744
CVS HEALTH #00028 2000 MENDON ROAD	CUMBERLAND, RI	401-527-7680
CVS PHARMACY # 21 1117 10TH STREET UNIT C-1	WASHINGTON, DC	202-326-1405
CVS Pharmacy # 3... 1163 PROVIDENCE RD, WHITINSVIL...	WHITINSVILLE, MA	508-234-3599
CVS Pharmacy # 3... 4511 LANTANA RD	LAKE WORTH, FL	999-999-9999
CVS Pharmacy # 5... 4149 N OAK TRAFFICWAY	KANSAS CITY, MO	816-453-2627

Accepts electronic prescriptions; using these pharmacies reduces wait times, increases patient safety, and improves quality of care.



Pharmacies displaying eRx  accept electronic prescriptions from your physician.

2. Click on a physician or pharmacy, and then click Select . Your selection displays on the Demographics page.



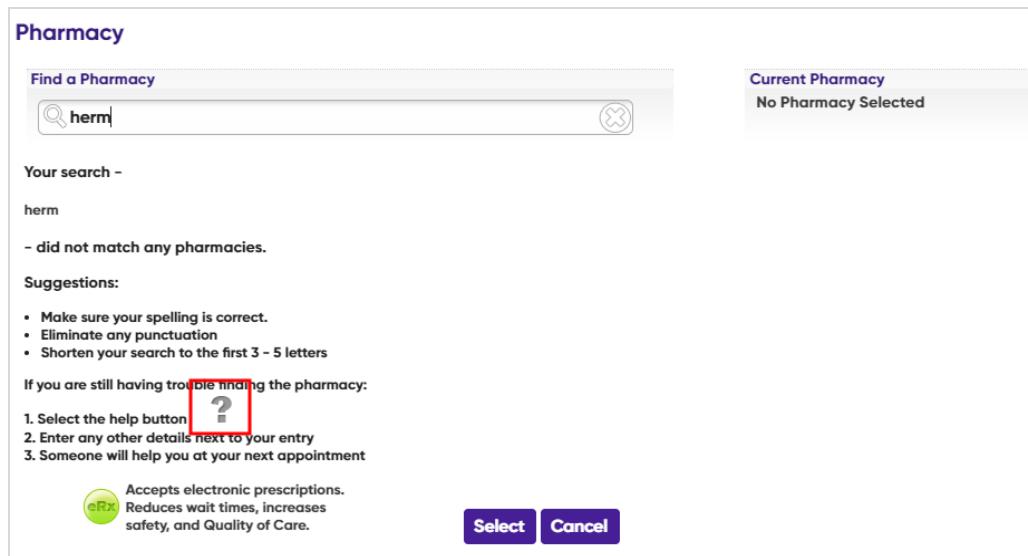
3. Do one of the following:

- Select **Return to Summary** , and then either select another area to update or select **Submit Update**
- Select an area at the top of the window to update that information.



Troubleshooting your pharmacy search

If you can't find your pharmacy or physician in the search, a message displays. Select **Help**



A text window opens populated with a question regarding your search. You can add to that question, or leave it as is, and then select **Save** to send the message to your provider's office.

Help with Demographics

One of our knowledgeable staff members will be happy to assist you during your next visit.

Enter your Question about Demographics in the box below. *

I could not find "herm" when searching for my primary pharmacy.

Save

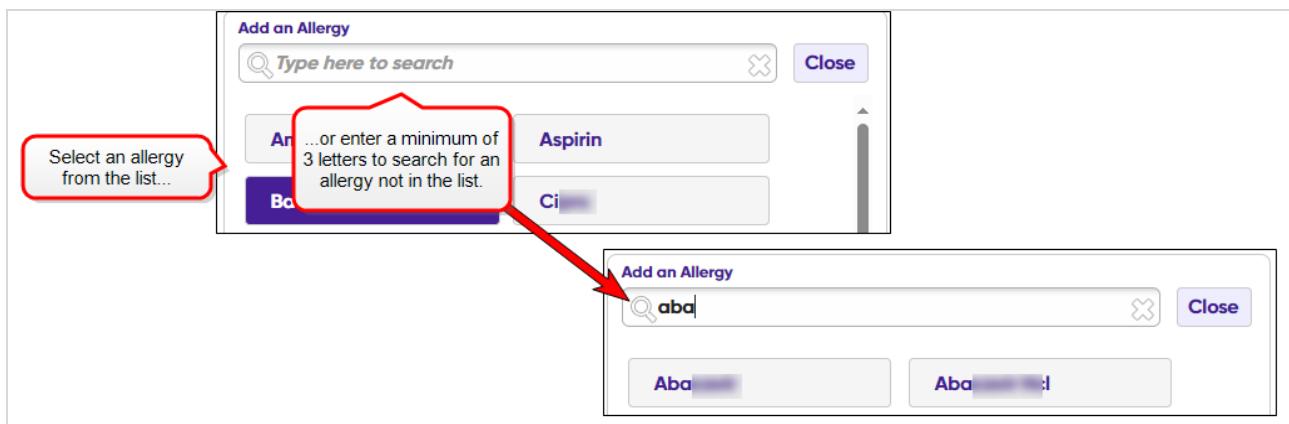
Cancel

Updating allergies



It is very important for your doctor to know as much as possible about any allergies you have.

1. To add any allergies, select Open [Open](#) to expand the list of common allergies, and then do one of the following:
 - Select an item from the list of common allergies in the **Add an Allergy** area on the right.
 - Enter a minimum of three letters in the search field to find an allergy not in the list of allergies, and then select it.



2. In the window that opens, select the date the allergy started. Use the gray scroll bar to move up and down on the page.
 - Select the month and year your allergy started. If you don't know the month, just select the year.

When did the allergy start? **January 1985**

Select Month			Select Year		
Jan	Feb	Mar	19_	1	2
Apr	May	Jun	20_	3	4
Jul	Aug	Sep		5	6
Oct	Nov	Dec		7	8
				9	0

If you select unknown, that displays on the **Allergies** page instead of a date



Started: unknown

 **Update**
 **Remove**

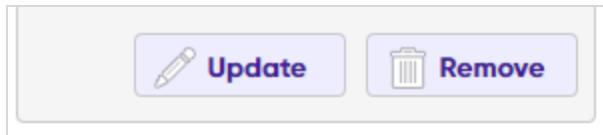
- Select the allergy reaction(s) from the list of common reactions, or use the **Other Reaction** field to enter a reaction not in the list. You can enter as many reactions as necessary.

What reaction(s) do you have?

Hives	Nausea	Diarrhea
Itching	Insomnia	Shock
Trouble Breathing	Anemia	Redness
Swelling	Skin Rash	Vomiting
Hypersensitivity	Cardiac Arrest	Anaphylaxis
Photosensitivity	Respiratory Distress	Dizziness
Headache	Hyperactivity	
Other Reaction <input type="text"/>		

Done

3. Select **Done** . The allergy information displays on the **Allergies** page. Use **Update**  to make changes, or **Remove**  to delete it from your chart.



4. Repeat the above steps until you finish adding all allergies.

5. Do one of the following:

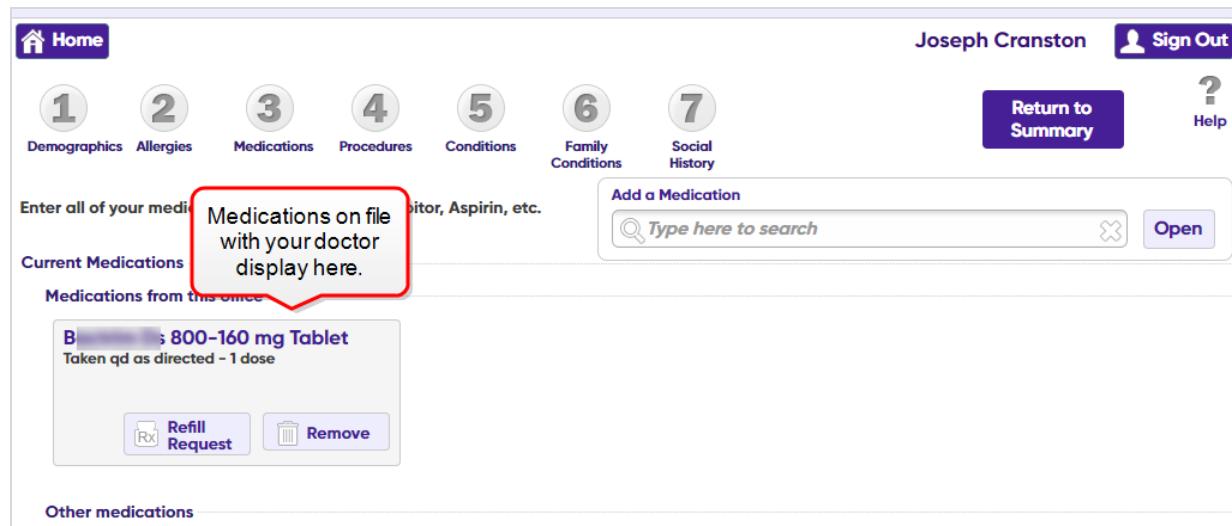
- Select **Return to Summary** , and then either select another area to update or select **Submit Update** .
- Select an area at the top of the window to update that information.



Updating medications

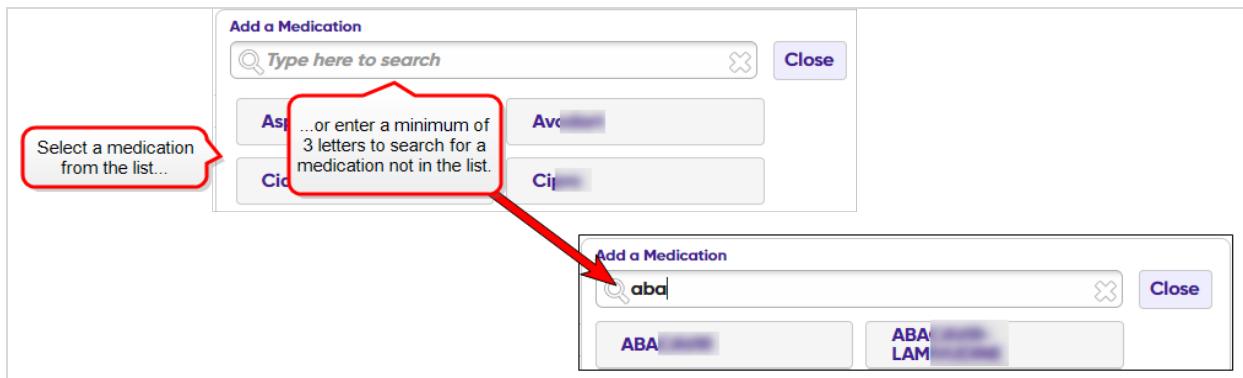
 Remember to list all medications you're taking, including non-prescription medications such as vitamins and other supplements.

If you already have a prescription on file with this doctor's office, they display under **Medications from this office**.



1. To add any medications, select Open  to expand the list of common medications, and then do one of the following:

- Select an item from the list of common medications in the **Add a Medication** area on the right.
- Enter a minimum of three letters in the search field to find a medication not in the list of medications, and then select it.



Select a medication from the list...

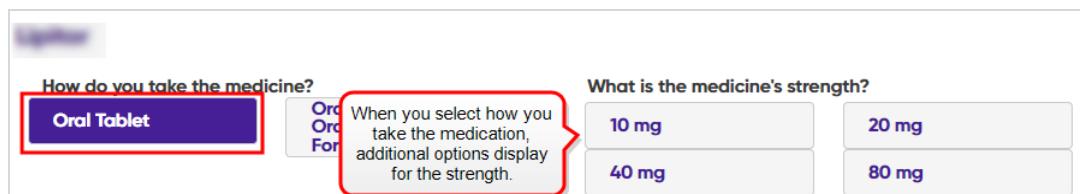
...or enter a minimum of 3 letters to search for a medication not in the list.

ABA

ABA LAM

2. In the window that opens, select any additional details about your medication. Use the gray scroll bar to move up and down on the page.

- Select how you take the medication, such as **Oral Tablet**, **Oral Powder**, and so on. When you select how you take it, additional options may display for you to select the strength.



How do you take the medicine?

Oral Tablet

When you select how you take the medication, additional options display for the strength.

What is the medicine's strength?

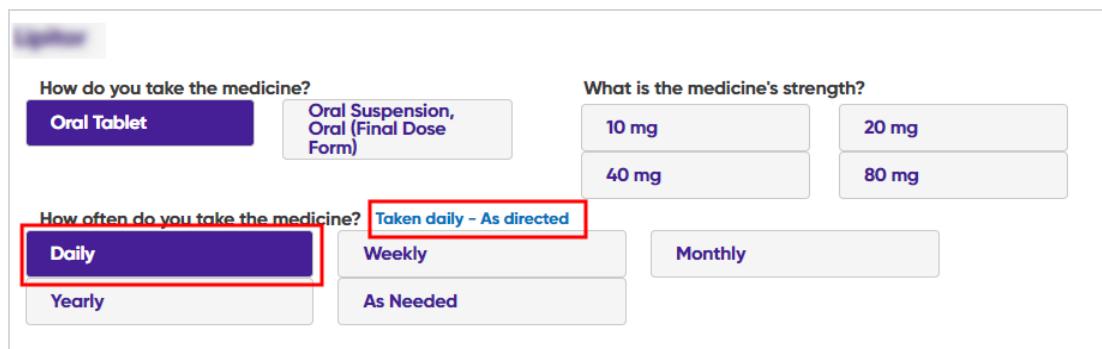
10 mg

20 mg

40 mg

80 mg

- Select how often you take the medication. By default, the system automatically selects **Daily** and displays **Taken daily - as directed**.



How do you take the medicine?

Oral Tablet

Oral Suspension, Oral (Final Dose Form)

What is the medicine's strength?

10 mg

20 mg

40 mg

80 mg

How often do you take the medicine?

Daily

Taken daily - As directed

Weekly

Monthly

Yearly

As Needed

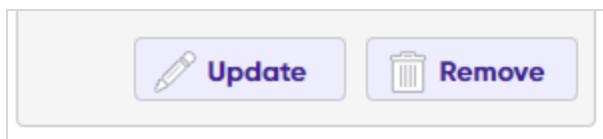
- Select the month and year you started taking the medication. If you don't know the

month, just select the year.

The form displays the following information:

- How do you take the medicine? **Oral Tablet**
- What is the medicine's strength? **10 mg**
- How often do you take the medicine? **Daily**
- When did you start taking the medicine? **January 2023**
- Start date selection: **Jan** (selected), **Feb**, **Mar**, **19** (selected), **1**, **2**, **3**, **Apr**, **May**, **Jun**, **20** (selected), **4**, **5**, **6**, **Jul**, **Aug**, **Sep**, **7**, **8**, **9**, **Oct**, **Nov**, **Dec**, **0**
- Done button

3. Select **Done**. The medication information displays under **Other medications** on the **Medications** page. Use **Update** to make changes, or **Remove** to delete it from your chart.



4. Repeat the above steps until you finish adding all medications.
5. Do one of the following:

- Select **Return to Summary**, and then either select another area to update or select **Submit Update**.
- Select an area at the top of the window to update that information.

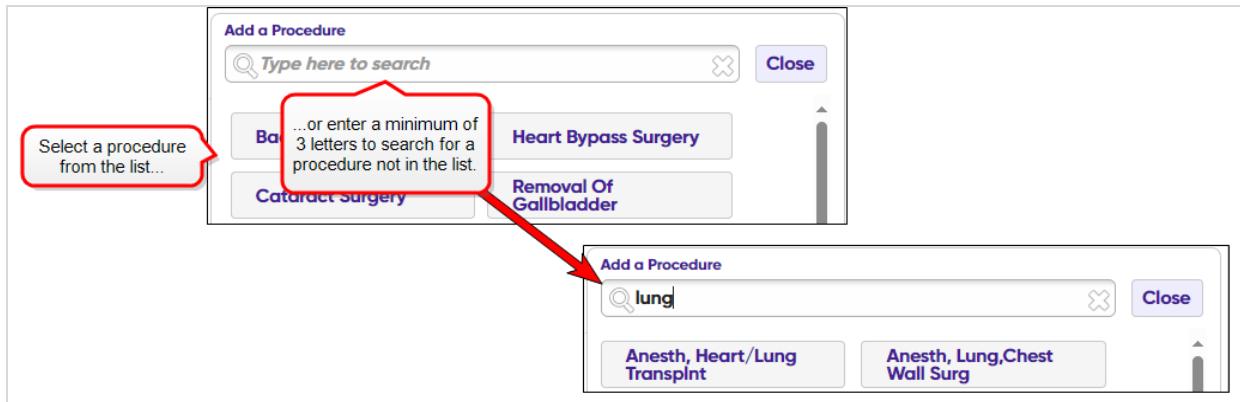


Updating procedures



Be sure to include past surgeries and other procedures in your portal information.

1. To add any procedures, select **Open** to expand the list of common procedures, and then do one of the following:
 - Select an item from the list of common procedures in the **Add a Procedure** area on the right.
 - Enter a minimum of three letters in the search field to find a procedure not in the list of procedures, and then select it.



2. In the window that opens, select the date you had the procedure done.
 - Select the month and year you had the procedure done. If you don't know the month, just select the year.

Colonoscopy

When did the procedure occur? **July 2022**

Select Month

Jan	Feb	Mar
Apr	May	Jun
Jul	Aug	Sep
Oct	Nov	Dec

Select Year

19_	1	2	3
20_	4	5	6
7	8	9	
0			

Done

If you select unknown, that displays on the **Procedures** page instead of a date



Started: unknown

Update

Remove

3. Select **Done** . The procedure information displays on the **Procedures** page. Use **Update** to make changes, or **Remove** to delete it from your chart.

Update

Remove

4. Repeat the above steps until you finish adding all procedures.

5. Do one of the following:

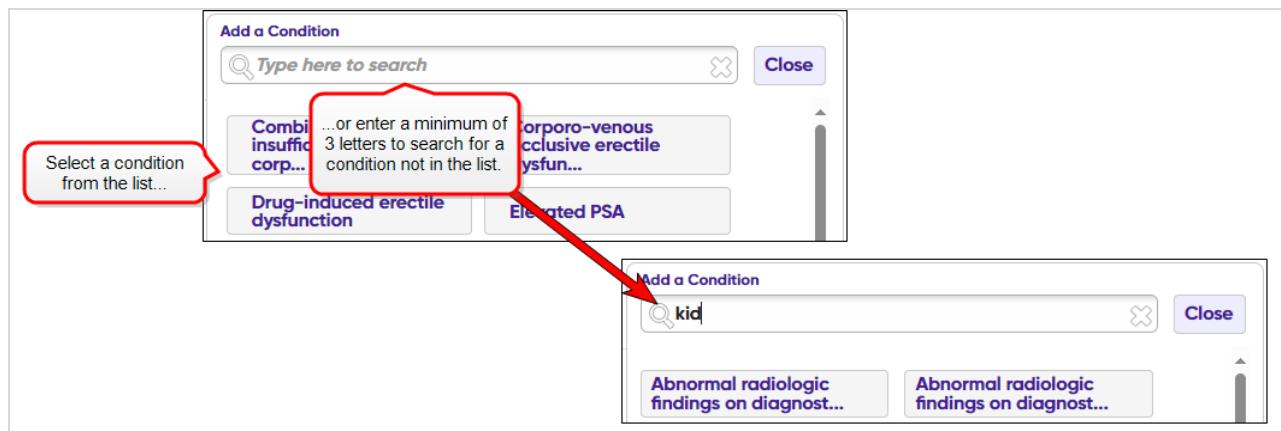
- Select **Return to Summary**  , and then either select another area to update or select **Submit Update**  .
- Select an area at the top of the window to update that information.



Updating medical conditions

 Knowing all your existing medical conditions is very important for your doctor.

1. To add any medical conditions, select **Open**  to expand the list of common medical conditions, and then do one of the following:
 - Select an item from the list of common medical conditions in the **Add a Condition** area on the right.
 - Enter a minimum of three letters in the search field to find a medical condition not in the list of conditions, and then select it.



2. In the window that opens, select the medical condition's diagnosis date.

- Select the month and year the medical condition was diagnosed. If you don't know the month, just select the year.

Kidney Cyst

When were you diagnosed? **December 2006**

Select Month

Jan	Feb	Mar
Apr	May	Jun
Jul	Aug	Sep
Oct	Nov	Dec

Select Year

19_	1	2	3
20_	4	5	6
	7	8	9
	0		

Done

If you select unknown, that displays on the **Conditions** page instead of a date



Started: unknown



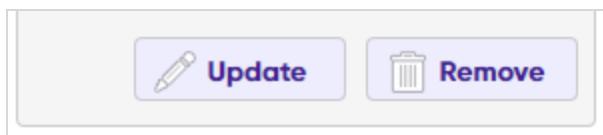
Update



Remove

3. Select **Done** . The medical condition information displays on the **Conditions** page.

Use **Update** to make changes, or **Remove** to delete it from your chart.



4. Repeat the above steps until you finish adding all medical conditions.

5. Do one of the following:

- Select **Return to Summary** , and then either select another area to update or select **Submit Update** .
- Select an area at the top of the window to update that information.

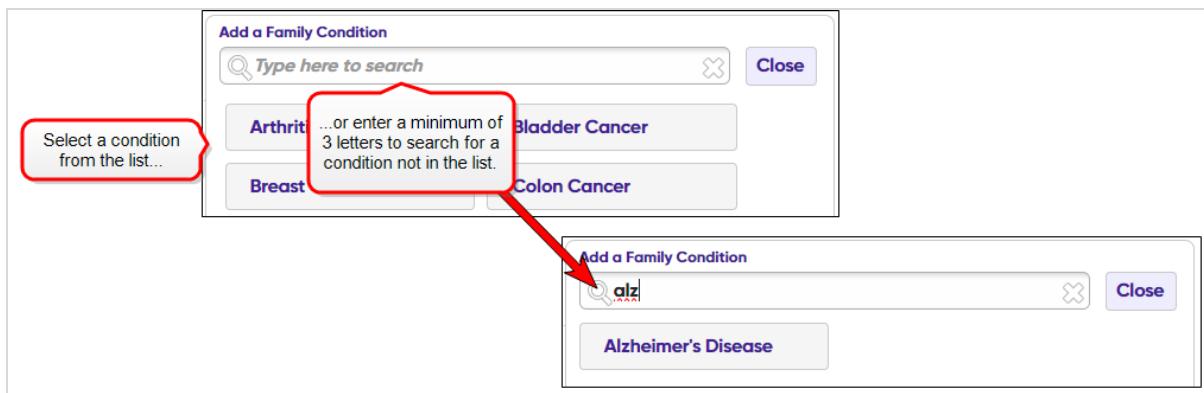


Updating family conditions

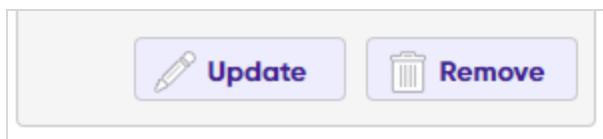


Use this area to enter information about your family's history of medical conditions.

1. To add any family conditions, select **Open** to expand the list of common family conditions, and then do one of the following:
 - Select an item from the list of common family conditions in the area on the right.
 - Enter a minimum of three letters in the search field to find a family condition not in the list of conditions, and then select it.



2. In the window that opens, select the family member(s) with the condition.
3. Select **Done** . The family condition information displays on the **Family Conditions** page. Use **Update** to make changes, or **Remove** to delete it from your chart.



4. Repeat the above steps until you finish adding all family conditions.
5. Do one of the following:
 - Select **Return to Summary** , and then either select another area to update or select **Submit Update**

Submit Update

- Select an area at the top of the window to update that information.



Home

Select an area to update...

Joseph Cranston

Sign Out

1 Demographics 2 Allergies 3 Medications 4 Procedures 5 Conditions 6 Family Conditions 7 Social History

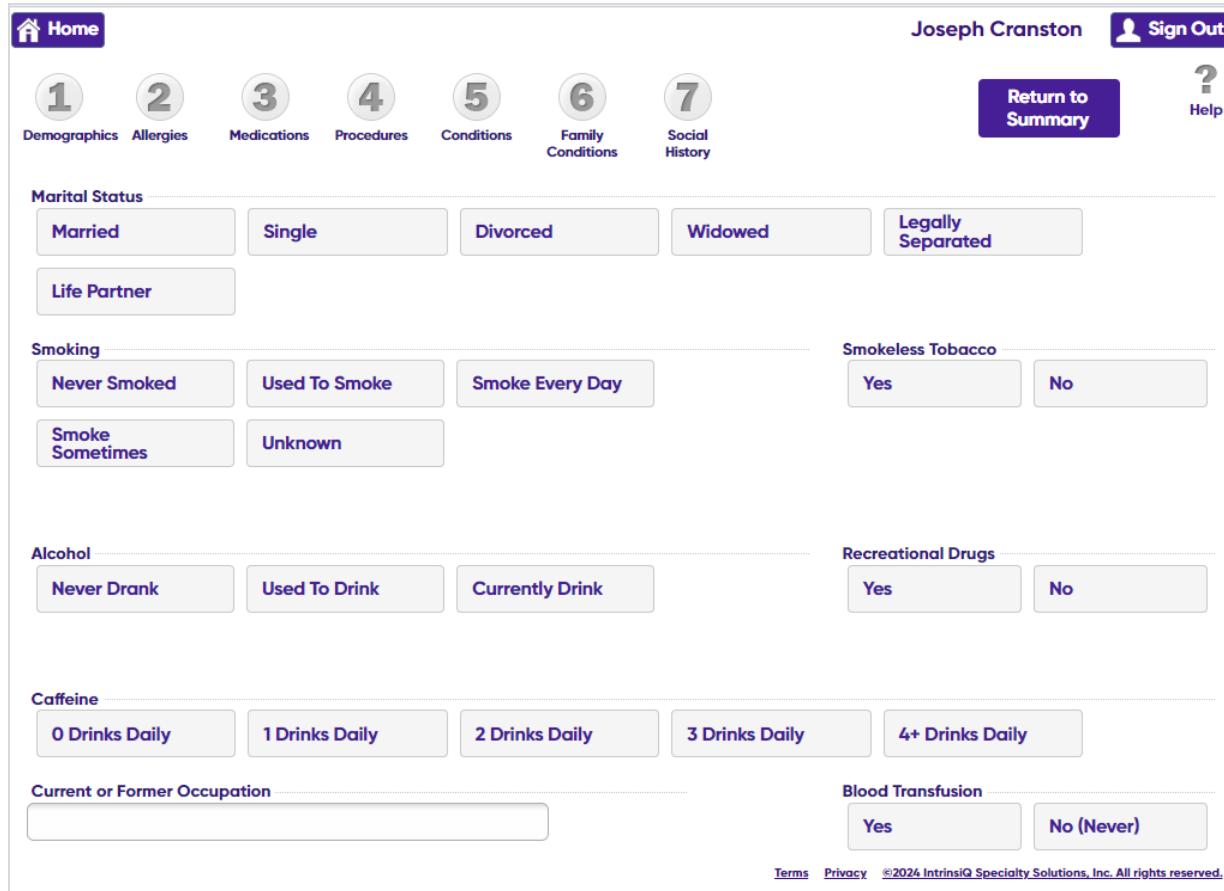
...or select **Return to Summary**

Return to Summary

Help

Updating social history

This is the last of the update pages and contains eight (8) areas of information to complete.



Home

Joseph Cranston

Sign Out

Help

Return to Summary

1 Demographics 2 Allergies 3 Medications 4 Procedures 5 Conditions 6 Family Conditions 7 Social History

Marital Status

Married Single Divorced Widowed Legally Separated

Life Partner

Smoking

Never Smoked Used To Smoke Smoke Every Day

Smoke Sometimes Unknown

Smokeless Tobacco

Yes No

Alcohol

Never Drank Used To Drink Currently Drink

Recreational Drugs

Yes No

Caffeine

0 Drinks Daily 1 Drinks Daily 2 Drinks Daily 3 Drinks Daily 4+ Drinks Daily

Current or Former Occupation

Blood Transfusion

Yes No (Never)

Done

- **Marital Status** - Select your marital status. You can only pick one option.
- **Smoking** - Select your smoking status. When you select **Used to Smoke**, **Smoke Every Day**, or **Smoke Sometimes**, a new window opens with additional options:
 - **Used to Smoke** - Select when you stopped smoking, in days, weeks, months, or years, select the number of packs you used to smoke per day, and then select **Done**

Used To Smoke

When did you stop smoking?

7	8	9	Days
4	5	6	Weeks
1	2	3	Months
0	.		Years
			 Clear

How many packs did you smoke each day?

Less than 1/2 Pack Daily	1/2 Pack Daily	1 Pack Daily
2 Packs Daily	3 Packs Daily	4+ Packs Daily

 Remove  Done

- Smoke Every Day or Smoke Sometimes - Select when you started smoking, in days, weeks, months, or years, select the number of packs you smoke per day, and then select Done .

Smoke Sometimes

When did you start smoking?

7	8	9	Days
4	5	6	Weeks
1	2	3	Months
0	.		Years
			 Clear

How many packs do you smoke each day?

Less than 1/2 Pack Daily	1/2 Pack Daily	1 Pack Daily
2 Packs Daily	3 Packs Daily	4+ Packs Daily

 Remove  Done



If you select **Remove** in either window, the window closes without saving your selections and clears the Smoking status option you selected.

- **Smokeless Tobacco** - Select if you use smokeless tobacco or not.
- **Alcohol** - Select your alcohol use. When you select **Used to Drink** or **Currently Drink**, a new window opens with additional options:
 - **Used To Drink** - Select when you stopped drinking, in days, weeks, months, or years, select the number of alcoholic drinks you had per day, and then select **Done** .

Used To Drink

When did you stop drinking?

7	8	9	Days
4	5	6	Weeks
1	2	3	Months
0	.		Years

Clear

How many alcoholic drinks did you drink each day?

7	8	9	Day
4	5	6	Week
1	2	3	Month

Remove **Done**

- **Currently Drink** - Select the number of alcoholic drinks you have per day, rate your

drinking as **Social**, **Light**, **Moderate**, or **Excessive**, and then select **Done**.

Done

Currently Drink

How many alcoholic drinks do you drink each day?

7	8	9	Day
4	5	6	Week
1	2	3	Month
0	.		Year

 **Clear**

How do you rate your drinking?

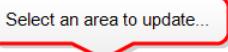
Social	Light	Moderate
Excessive		

 **Remove** **Done**

- **Recreational Drugs** - Select if you use recreational drugs or not.
- **Caffeine** - Select how much caffeine you have on a daily basis.
- **Current or Former Occupation** - Use the text box to enter your current or former occupation.
- **Blood Transfusion** - Select if you ever had a blood transfusion or not.

Do one of the following:

- Select **Return to Summary**, and then either select another area to update or select **Submit Update**.
- Select an area at the top of the window to update that information

Home  **Joseph Cranston** 

1 Demographics **2 Allergies** **3 Medications** **4 Procedures** **5 Conditions** **6 Family Conditions** **7 Social History**  **Return to Summary** 

Reviewing and printing the summary

To print a summary of your medical information, use **Print Summary**  to send the information to your printer.

Demographics			
Name:	John Doe	Email:	john.doe@youremail.com
DOB:	01/01/1945	Home:	
SSN:		Cell:	
Gender:	Male	Work:	Language:
Address:	Springfield, MO	Emergency Contact:	Race: White, Hispanic or Latino
		Referring Physician:	Ethnicity: Not Hispanic Or Latino
Primary:		Primary Pharmacy:	cvs/pharmacy #10151
Secondary:			
Allergies			
Latex	Hives	Since February 1959	
Medications			
81 mg Tablet	Taken daily - As directed		
calcium) 40 mg Tablet	Taken as directed - 1 dose		
MULTI-VITAMIN DAILY Capsule	Taken daily - As directed		
OG Pen	Taken daily - As directed		
Procedures			

Viewing activity history for documents and labs

You can see the history of when you viewed documents and lab results by selecting **Activity History**  from the Home page.

In the window that opens, use the gray scroll bar to move up and down in the list, or enter a date range at the bottom of the window and select **Search**  to narrow down the list.

Summary, Documents & Labs Activity History

Date	Event	Patient/Representative Name
February 19th 2024, 2:18:33 pm	Viewed Document: Office Visit - Thursday, February 1 2024	Cranston, Joseph
February 19th 2024, 2:18:30 pm	Viewed Document: Letter : Procedures Scheduled - Thursday, February 1 2024	Cranston, Joseph
February 19th 2024, 2:18:26 pm	Viewed Document: Return Visit - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:18:05 pm	Viewed Document: Labs Order - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:16:01 pm	Viewed Document: Return Visit - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:20 pm	Viewed Document: PSA - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:17 pm	Viewed Document: Chart Note - Monday, February 19 2024	Cranston, Jo
February 19th 2024, 2:11:15 pm	Viewed Document: Office Visit - Monday, February 19 2024	Cranston, Jo
February 19th 2024, 2:11:13 pm	Viewed Document: Office Visit - Monday, February 19 2024	Cranston, Jo
February 19th 2024, 2:11:11 pm	Viewed Document: Portal Updates - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:10 pm	Viewed Document: X-Ray Order - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:09 pm	Viewed Document: X-Ray Order - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:06 pm	Viewed Document: X-Ray Order - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:11:04 pm	Viewed Document: X-Ray Order - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:10:57 pm	Viewed Document: Return Visit - Monday, February 19 2024	Cranston, Joseph
February 19th 2024, 2:02:32 pm	Viewed Document: (CCDA) My Summary - Monday, February 19 2024. Report Data: Feb 19th, 2024	Cranston, Joseph

Use the gray scroll bar to move up and down in the list.

From 01/20/2024

To 02/19/2024

Search

Done

Uploading documents

You can upload documents to the Patient Portal to share with your provider:

1. Select **Upload Documents** 
2. Select one of the following:
 - Use **File Upload** to upload a .pdf file.
 - Use **URL Link Upload** to link to a specific url. For example, you may have a URL to access a radiology image at the hospital and want to share that with your provider.
3. Click the arrow beside **Please select a Document Type** and select the type of document to upload.

Upload My Documents

File Upload URL Link Upload

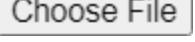
• **New Document**  • **Choose File** **No file chosen** 

Please select a Document Type

Lab Results, Patient-Provided
New Document
Transition of Care, Patient-Provided

Name	Document Type	Added by	Remove
February 20th 2024, 6:31:51 AM LabResult.pdf	Lab Results, Patient-Provided	Cranston, Joseph	

4. Do one of the following:

- If uploading a file, select **Choose File**  to locate and select the file, and then select **Add** 

Upload My Documents

File Upload URL Link Upload

• **Lab Results, Patient-Provided**  • **Choose File** **LabResult.pdf** 

The file displays in the list below, and a message displays that the document was saved successfully.

Upload My Documents

Document saved successfully

File Upload URL Link Upload

Please select a Document Type No file chosen

If you added this file in error, select the red X to delete the file.

Date Added	Document Name	Document Type	Added by	Remove
February 20th 2024, 6:31:51 AM	LabResult.pdf	Lab Results, Patient-Provided	Cranston, Joseph	

If uploading a picture, select **New Document**.

Upload My Documents



File Upload URL Link Upload

No file chosen

- If adding a URL, you can also add an optional narrative and select Add

Upload My Documents

File Upload URL Link Upload

Please select a Document Type

URL Link

Note: Only single URL Link can be added.

Narrative

- The Patient Portal uploads the selected document/URL and sends it to your physician.
- To remove a document from the Patient Portal, select **Remove**  and confirm that you want to remove the document. The system alerts you that the document will be removed from Patient Portal.



Since clicking **Add** immediately saves the document to your chart in the provider's office, you must contact your provider's office to permanently remove the document.

Confirm Delete

Only removes the document from Portal. Contact your physician's practice to remove the document from Practice. Do you wish to delete this file?

Yes

No

7. Select **Done**  at the bottom of the **Upload My Documents** window.

Generating an Electronic Summary

Generate a summary of your patient information to print or share with another provider.

1. Select **Generate Summary** .
2. Use the filters to filter the summary by a specific date or a date range.

Generate My Summary:

Select filter by Date or Date range:

By Date:

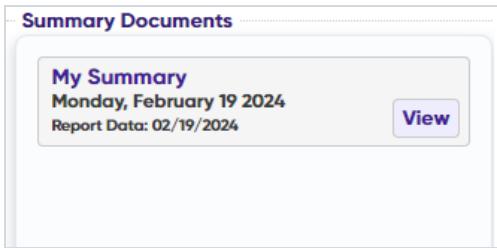
By Date Range

From To

**Note: Access the document generated under Summary Documents area

Generate **Cancel**

3. Select **Generate** . When the generated file is ready, the following message displays.
4. Select **OK** .
5. Locate the document under **Summary Documents**, and then click on it to view it.



6. In the **Summary Documents** window, you can select to [Download](#), [Transmit](#), or [Print](#) the document.

Summary Documents
Select any document below to view.

My Summary
Monday, February 19 2024
Report Data: 02/19/2024

Download Transmit Print

Qa_90500rc - IMS Cert Practice: Ambulatory
Summary Consolidated CDA for Joseph Cranston.
Date: 19-Feb-2024

Patient Name	Joseph Cranston	Previous Name	No Information
Date of birth	August 25, 1979	Sex	Male
Race	White	Other / Granular Races(s)	Unknown
Ethnicity	Unknown	Detailed Ethnicity	Unknown
Patient IDs	HTR70000047	Preferred language	
Contact info	Address not available Email (Home): cranstonjoseph24@gmail.com		
Document Id	e429f506-90cf-48a1-a6a-65d23a3f0edf		
Document Created:	February 19, 2024, 08:43:10		
Performer	IMSScript Doctor of qa_90500rc - IMS Cert Practice Tel: 204-123-4567		
Primary performer	IMSScript Doctor of qa_90500rc - IMS Cert Practice Tel: (417)864-8900, Address: 1361 K ST SE APT 204, Washington, DC 20003, US		
Secondary performer	IMSScript Doctor of qa_90500rc - IMS Cert Practice Tel: (417)864-8900, Address: 1361 K ST SE APT 204, Washington, DC 20003, US		

Done

7. When you finish, select **Done** [Done](#).

Downloading the CCDA

The document summary you generate is in a Consolidated Clinical Data Architecture (CCDA) format. CCDA files are standard XML files that contain structured and unstructured patient data and are used to support health information exchange with other EHR systems.

To download the CCDA:

1. Select **Download** [Download](#).
2. In the window that opens, select the format to download. If you're not sure, select HTML.

Choose the format you want

HTML

XML

Note: Both are human-readable – If you aren't sure click **HTML**

3. Locate the file in your **Downloads** folder on your computer.

Transmitting the CCDA

Your provider's office may have a feature that allows you to transmit the CCDA Documents to other physicians in your Urologist's network, such as your Referring Physician. To send the CCDA to another physician:

1. Select **Transmit** 
2. Typically, you should send your medical information via the secure Direct email (Direct email is a unique email address for sending protected health information via the internet). Select **Send Direct Email**, and then scroll through the list to find a provider.

Send Direct Email

Last Name	First Name	Practice Name	Email Address
Best	Wayne		ucmdqa@direct.med
Nair	Venu	Nephrology Associ...	venu.nair.p119@direct

Cancel **Send**

If the provider's Direct email isn't in the list, enter the email address you have in the text box below the **Send Unsecure Email** option.



Send Unsecure Email

mydoc@lakesidemedical

3. Select **Send** . A message displays if the email was sent successfully.

Last Name	First Name	Practice N
Best	Wayne	
Nair	Venu	Nephrolog
Message sent Successfully		

Printing the CCDA

To print the CCDA:

1. Select **Print** .
2. In the **Print** window that opens, select your printer, and then select **Print**.

Sending and receiving secure messages

Viewing and replying to messages

You can securely exchange messages with your provider's office from the portal.

All messages display on the **Home** page. Unread messages display **Unread**.

The screenshot shows the 'Messages' section of the portal. At the top, a purple header bar contains the text 'New Message'. Below this, a list of messages is displayed in a table format. The first message is titled 'Message For Office' and has a 'Reply by: IMSScript Doctor' note. To the right of this message is a purple 'Unread' button. Below the message is a 'View' button. The second message is titled 'Refill Request' and also has a 'Reply by: IMSScript Doctor' note. To its right is a purple 'View' button.

1. Click a message to open it.

Messages
Select any message below to view.

Print

Message For Office
Reply by: IMSScript Doctor
Feb 20th, 2024

Reply

---Message---
From: IMSScript Doctor
To: Joseph Cranston
Sent: 02/20/2024 7:17 AM
Billing was filed successfully.

---Message---
From: Joseph Cranston
To: IMSScript Doctor
Sent: 02/19/2024 8:52 AM
Please confirm billing was filed with insurance.

Messages and requests sent to your doctor's office are NOT monitored 24/7.
If you are experiencing a medical emergency, you should call 911 immediately.

Done

2. Select **Reply** to send another message, or select **Done** to return to the Home page.



To print the message, select **Print** . In the **Print** window that opens, select your printer, and then select **Print**.

Creating and Sending New Messages

To send a new message to your provider's office:

1. Select **New Message** above the messages on the Home page.
2. In the **New Message** window, make the following selections:
 - Click the drop-down list under **Select your Provider** to select the provider name for the message.
 - Select if this is a **Message for Office**, an **Appointment Request**, a **Refill Request**, or a request for an **E-Visit**.

New Message

Select your Provider. *

IMSScript Doctor

Select the type of message you like to send.

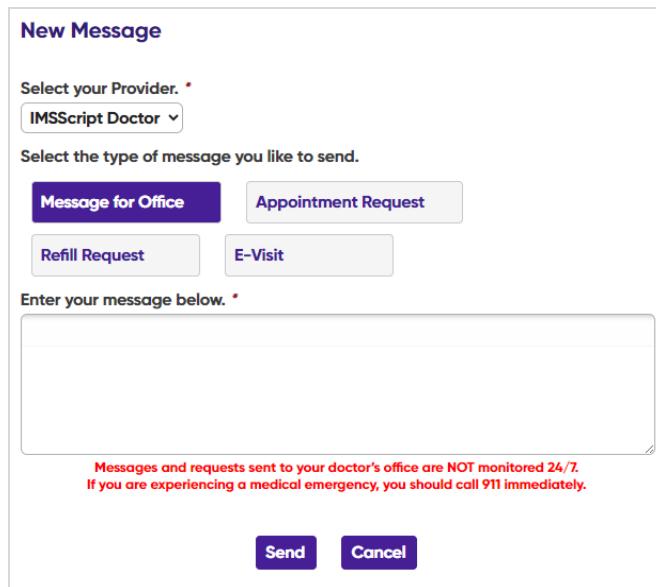
Message for Office **Appointment Request**

Refill Request **E-Visit**

Enter your message below. *

Messages and requests sent to your doctor's office are NOT monitored 24/7. If you are experiencing a medical emergency, you should call 911 immediately.

Send **Cancel**



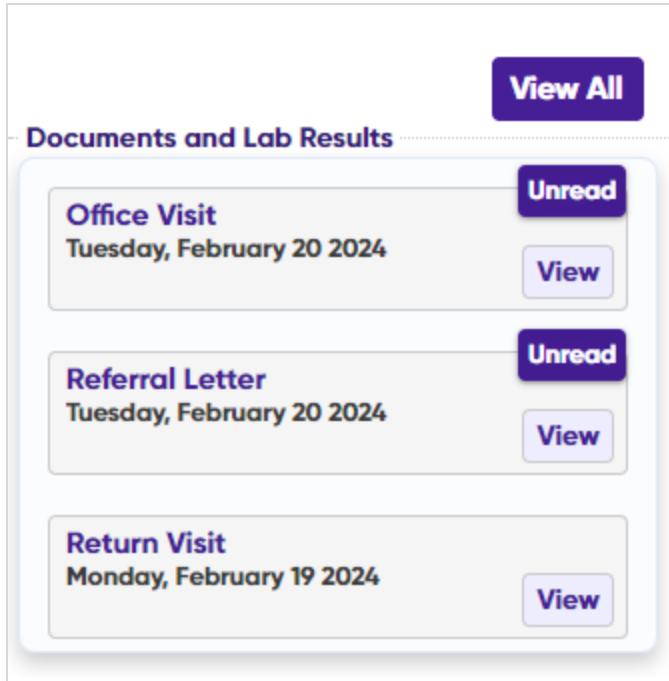
- Enter the message in the text field.

3. When you finish, select **Send**.

Your message displays in the list. When the office responds, **Unread**  will display on that message.

Viewing documents and lab results

From the **Home** page, you can view **Documents and Lab Results** your provider's office sent you for review. It's a good idea to review these documents in a timely manner.



View All

Documents and Lab Results

Office Visit
Tuesday, February 20 2024

Unread **View**

Referral Letter
Tuesday, February 20 2024

Unread **View**

Return Visit
Monday, February 19 2024

View

1. Select the document to view.

You can also select **View All** to display all documents and lab results, and select a specific document to view.

Documents and Lab Results

Select any document below to view, or search.

Filter by date range and/or document type: (Last 30 days displayed by default)

From 01/21/2024 To 02/20/2024 Document Type All Search

Office Visit
Tuesday, February 20 2024

Referral Letter
Tuesday, February 20 2024

Return Visit
Monday, February 19 2024

X-Ray Order
Monday, February 19 2024

Portal Updates
Monday, February 19 2024

Office Visit
Monday, February 19 2024

OFFICE VISIT REPORT 02/20/2024

Joseph Cranston

MRN: HTR70000047
DOB: 08/25/1979, 44 year old Male
SSN: PRIMARY CARE:
REFERRING:
PROVIDER: IMSScript Doctor, M.D.
LOCATION: qa_90500rc - IMS Cert Practice

CC: None

ALLERGIES: [REDACTED] - Insomnia, Hives, Vomiting

MEDICATIONS: [REDACTED] 800 mg-160 mg tablet 1 tablet PO Daily As Directed

GU PSH: No GU PSH

NON-GU PSH: Colonoscopy - about 7/1/2022

GU PMH: Malignant neoplasm of prostate - 2/19/2024
Elevated prostate specific antigen [PSA] - 2/1/2024
Kidney Cancer - 1/4/2024
Cyst of kidney, acquired - 2006

NON-GU PMH: No Non-GU PMH

IMMUNIZATIONS: None

FAMILY: Alzheimer's Disease - Runs In Family

2. In the **Documents and Lab Results** window that opens, use the gray scroll bar to move up and down on the page.

Documents and Lab Results
[Download](#)
[Print](#)
[Close](#)

Select any document below to view, or search.

Filter by date range and/or document type: (Last 30 days displayed by default)

From To Document Type [Search](#)

Office Visit
Tuesday, February 20 2024

OFFICE VISIT REPORT 02/20/2024

Joseph Cranston

MRN: **HTR70000047** PRIMARY CARE:
 DOB: **08/25/1979, 44 year old Male** REFERRING:
 SSN: PROVIDER: **IMSS**
 LOCATION: **qa_90** Use the gray scroll bar to move up and down the page.

CC: None

ALLERGIES: In - Insomnia, Hives, Vomiting

MEDICATIONS: Paxil 75 mg-160 mg tablet 1 tablet PO Daily As Directed

GU PSH: No GU PSH

NON-GU PSH: Colonoscopy - about 7/1/2022

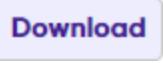
GU PMH: Malignant neoplasm of prostate - 2/19/2024
 Elevated prostate specific antigen [PSA] - 2/1/2024
 Kidney Cancer - 1/4/2024
 Cyst of kidney, acquired - 2006

NON-GU PMH: No Non-GU PMH

IMMUNIZATIONS: None

FAMILY Alzheimer's Disease - Runs In Family

3. To download or print, do one of the following:

- To download the document, select 

In the window that opens, select the format to download. If you're not sure, select HTML.

Choose the format you want

 HTML
 XML

Note: Both are human-readable - If you aren't sure click HTML

Locate the file in your **Downloads** folder on your computer.

- To print the document, select 

In the **Print** window that opens, select your printer, and then select **Print**.

4. Select Done  when you finish reviewing the document.

Saving the Patient Portal on your phone

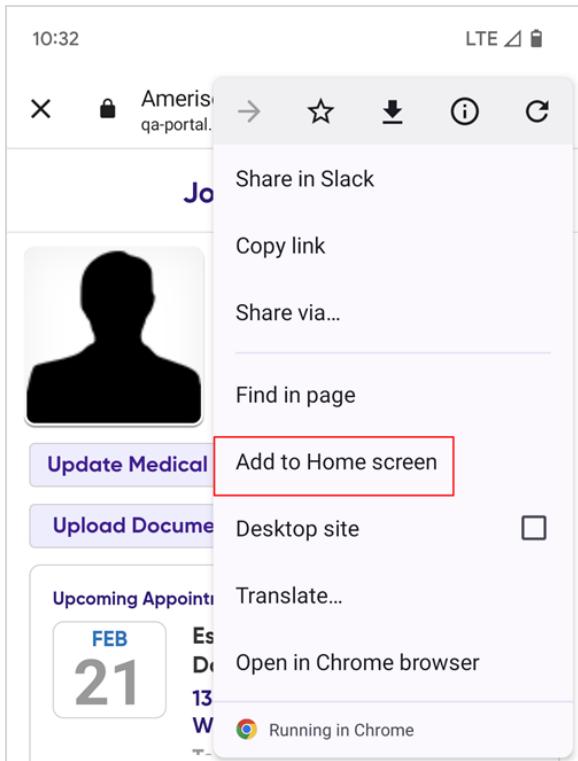
Android

Chrome

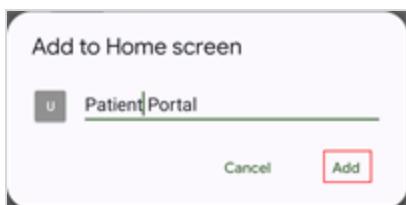
1. After opening the Patient Portal in the Chrome browser, tap the 3 dots in the top right of your screen.



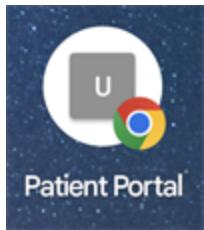
2. Tap Add to Home screen.



3. In the window that opens, you can edit the name, and then tap **Add**.

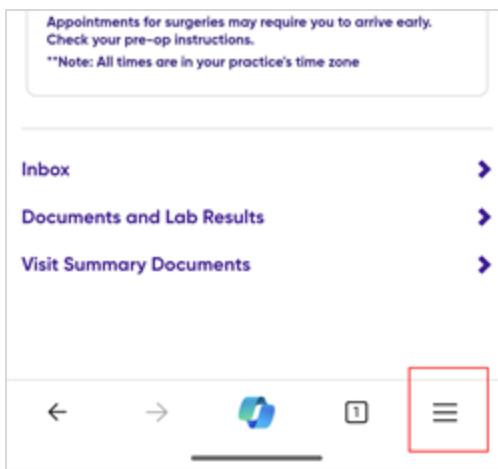


An icon displays on your home screen.

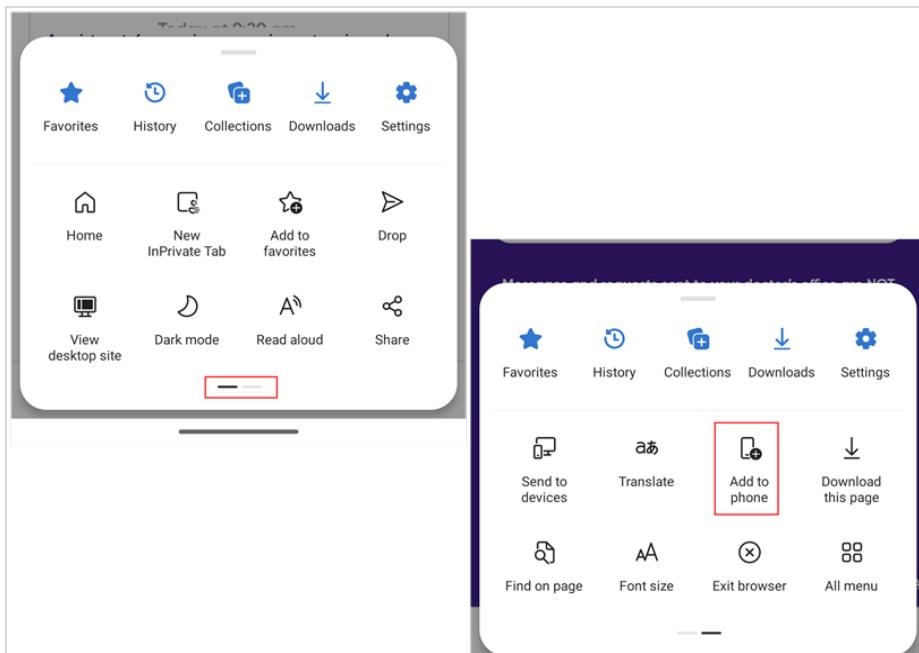


Edge

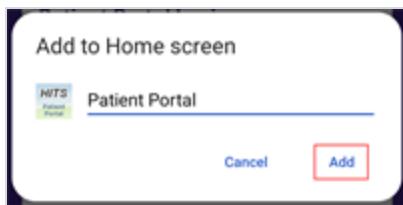
1. After opening the Patient Portal in the Edge browser, tap the menu icon at the bottom of the screen.



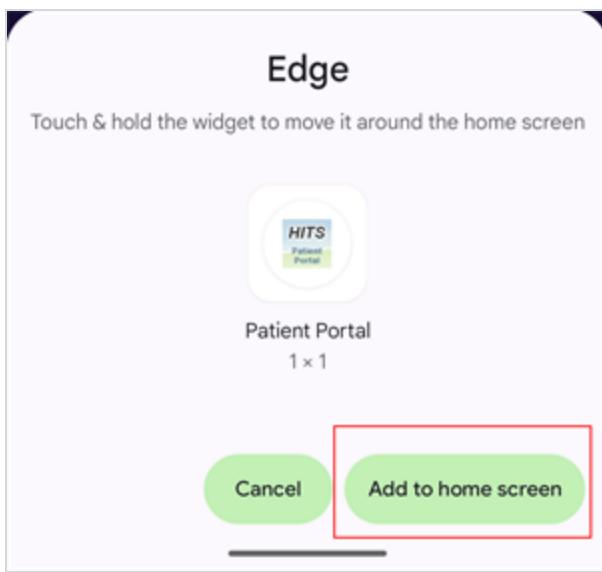
2. Swipe left to get to the 2nd screen, and tap **Add to phone**.



3. In the window that opens, you can edit the name, and then tap **Add**.



4. Tap **Add to home screen**.

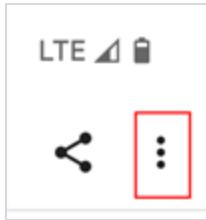


An icon displays on your home screen.

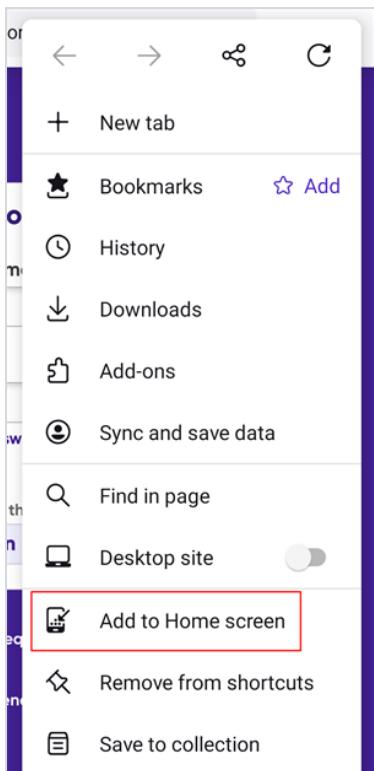


Firefox

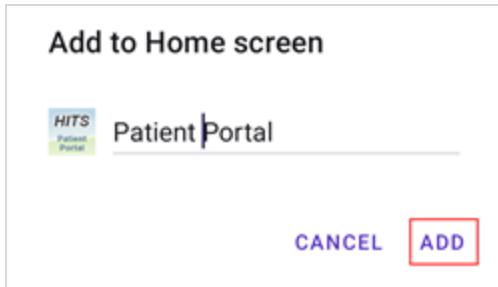
1. After opening the Patient Portal in the Firefox browser, tap the 3 dots in the top right of your screen.



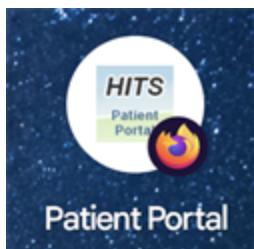
2. Tap **Add to Home screen**.



3. In the window that opens, you can edit the name, and then tap Add.



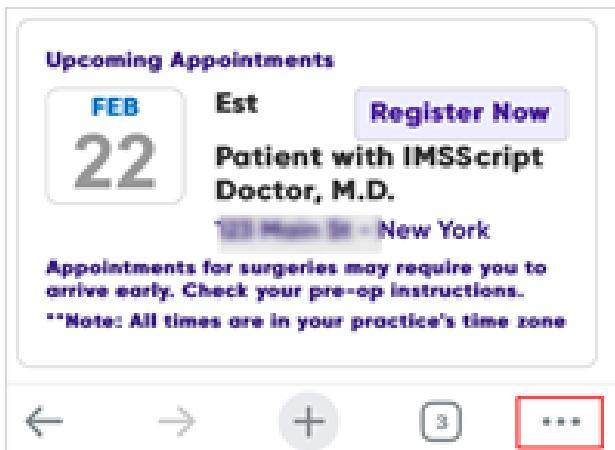
An icon displays on your home screen.



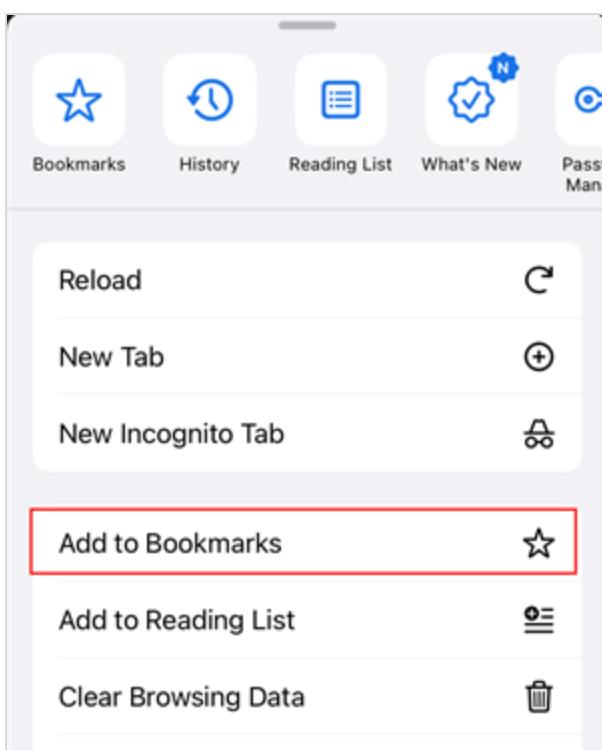
iPhone

Chrome

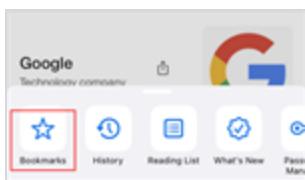
1. After opening the Patient Portal in the Chrome browser, tap the 3 dots in the bottom right of your screen.



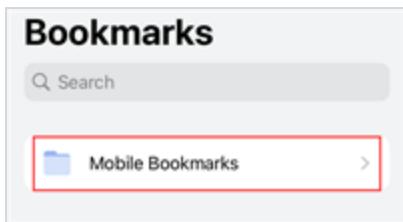
2. Scroll down the list and tap on **Add to Bookmarks**.



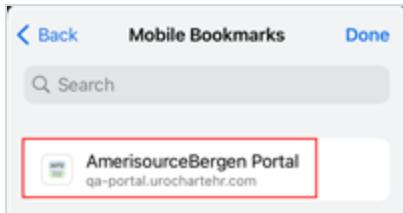
3. When you open Chrome at another time, if Chrome doesn't default to the Portal, tap the three dots in the bottom right of your screen, and then tap **Bookmarks**.



4. Tap on **Mobile Bookmarks**.

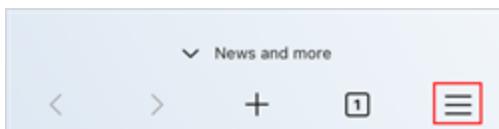


5. Tap the Portal bookmark to open the Patient Portal.

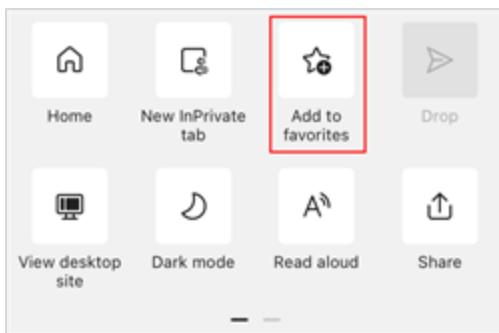


Edge

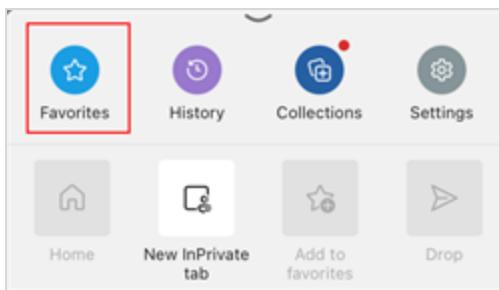
1. After opening the Patient Portal in the Edge browser, tap the menu icon at the bottom of the screen.



2. Tap Add to favorites.



3. When you open Edge at another time, if Edge doesn't default to the Portal, tap the menu icon at the bottom of the screen and tap on **Favorites**.



4. Tap on **Mobile Favorites**.

Favorites

Search favorites

Mobile Favorites

5. Tap on the Portal bookmark.

Mobile Favorites

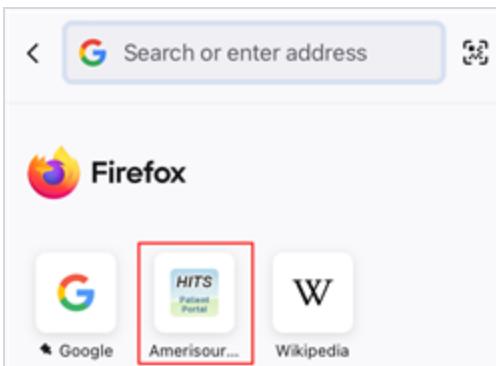
Search favorites

+ Add Folder

AmerisourceBergen Portal
qa-portal.urochartehr.com

Firefox

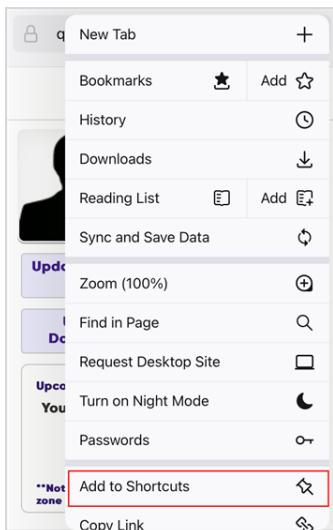
1. After opening the Patient Portal in the Firefox browser, Firefox automatically adds an icon to the home screen.



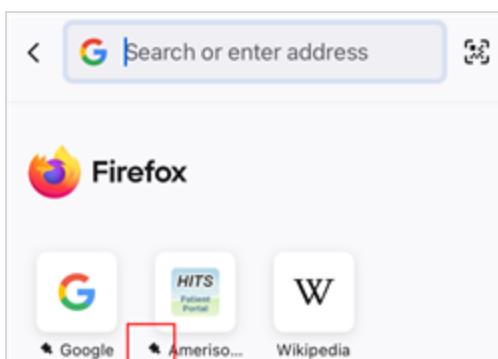
2. To pin it to the home screen, tap the menu icon at the bottom of the screen.



3. Tap Add to Shortcuts.

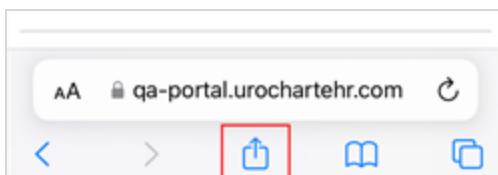


4. Firefox pins the shortcut to the home screen so it will always display there.

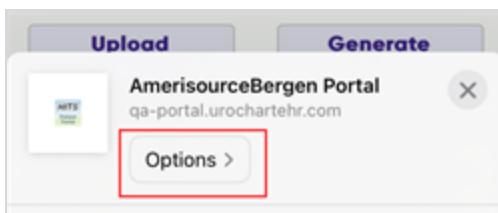


Safari

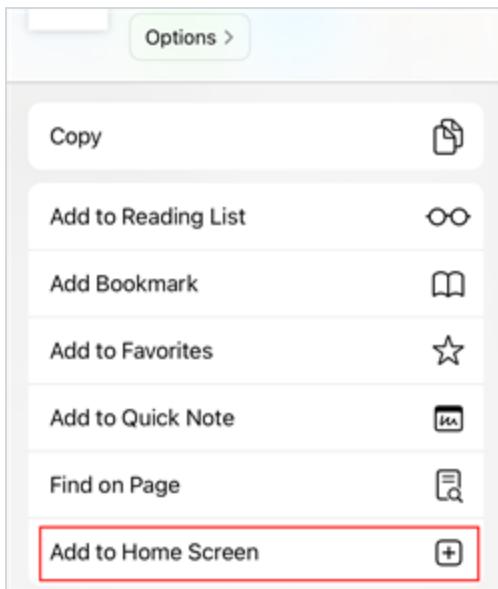
1. After opening the Patient Portal in the Safari browser, tap the share icon.



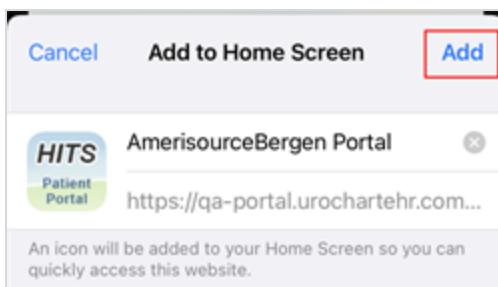
2. Tap on Options.



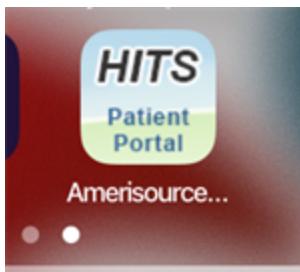
3. Tap Add to Home Screen.



4. You can edit the name, and then tap Add.



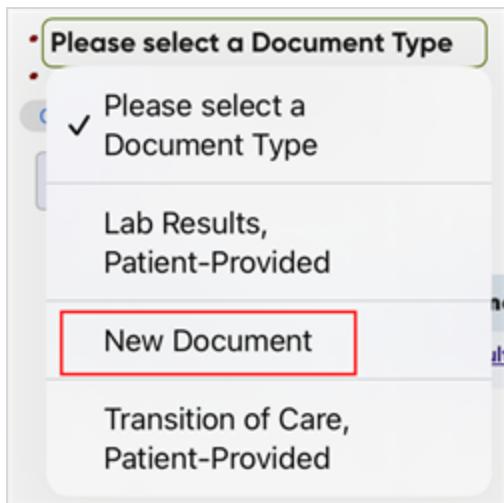
5. An icon displays on your home screen.



Uploading photos to the Patient Portal from your phone

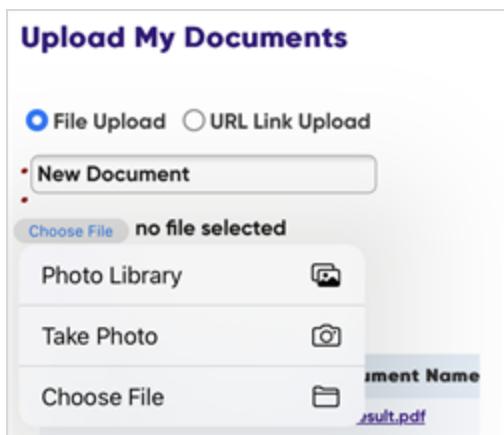
To upload a photo from your phone:

1. From the Home screen of the Patient Portal, tap **Upload Documents**.
2. Tap **Please select a Document Type**, and then tab on **New Document**.



If you don't see **New Document**, contact your practice so they can enable that option.

3. Tab Choose File, and then select if you want to upload a photo or file, or take a new photo.



4. Tap **Add** . The uploaded document displays at the bottom of the screen.

Upload My Documents

File Upload URL Link Upload

Please select a Document Type

•

no file selected

Date Added	Document Name
February 26th 2024, 8:33:43 AM	IMG_0044.png

5. Tap Done .