

Patient Portal User Guide

Contents

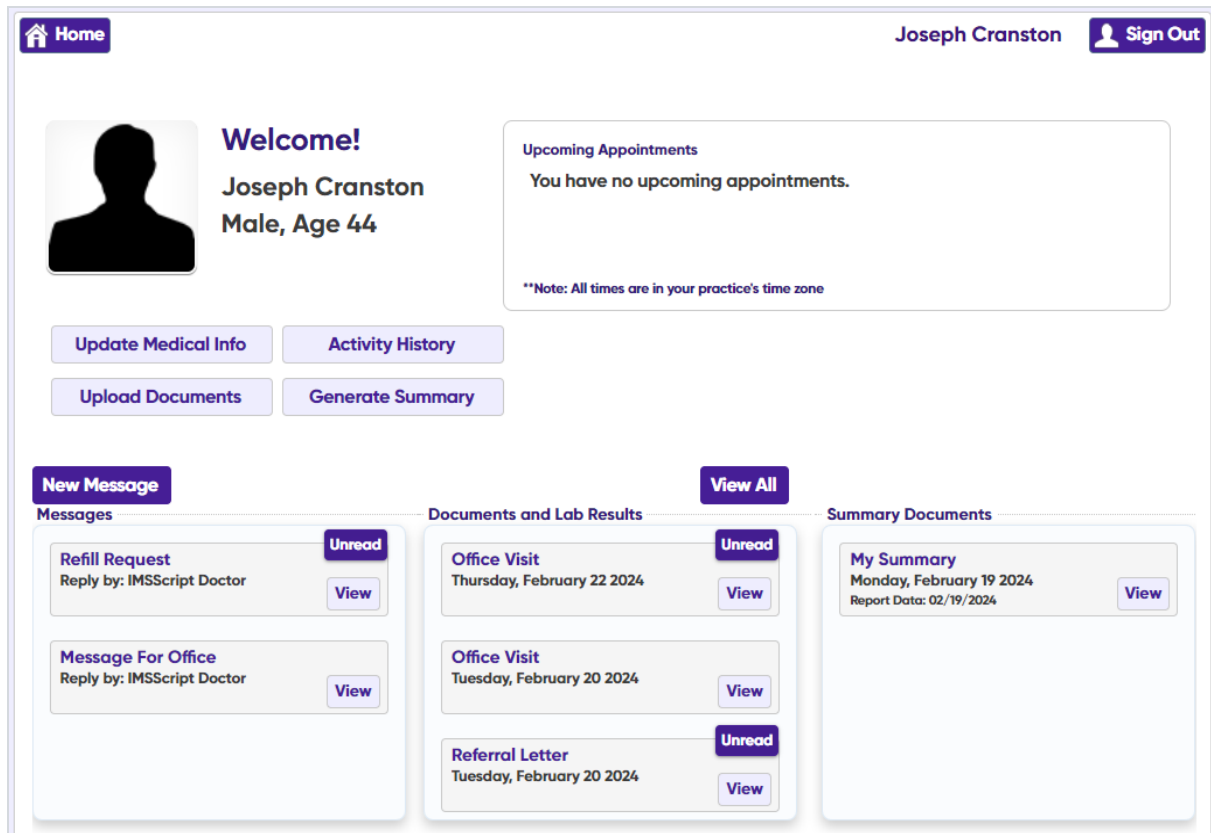
Welcome to Your Patient Portal	4
Home page features	4
Upcoming appointments	5
Registering for your next appointment	5
Updating your information	7
Updating demographics	8
Troubleshooting your pharmacy search	10
Updating allergies	11
Updating medications	13
Updating procedures	15
Updating medical conditions	18
Updating family conditions	20
Updating social history	21
Reviewing and printing the summary	25
Viewing activity history for documents and labs	25
Uploading documents	27
Generating an Electronic Summary	29
Downloading the CCDA	30
Transmitting the CCDA	31
Printing the CCDA	32
Sending and receiving secure messages	32
Viewing and replying to messages	32
Creating and Sending New Messages	33
Viewing documents and lab results	34
Saving the Patient Portal on your phone	37
Android	37
Chrome	37
Edge	38
Firefox	40
iPhone	41
Chrome	41
Edge	43
Firefox	44

Safari	45
Uploading photos to the Patient Portal from your phone	46

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

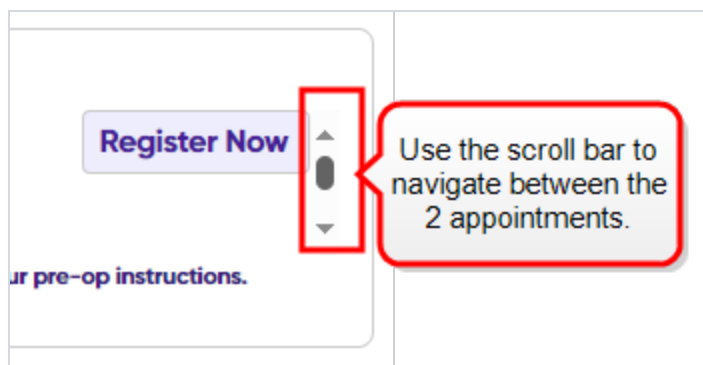
- [View appointments](#) you have scheduled in the next two weeks, and register in advance to save time at the office
- Update your [medical information](#) and send it to your provider's office.
- View a list of your [portal activity](#) for documents and labs.
- [Upload documents and URLs](#) for your 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

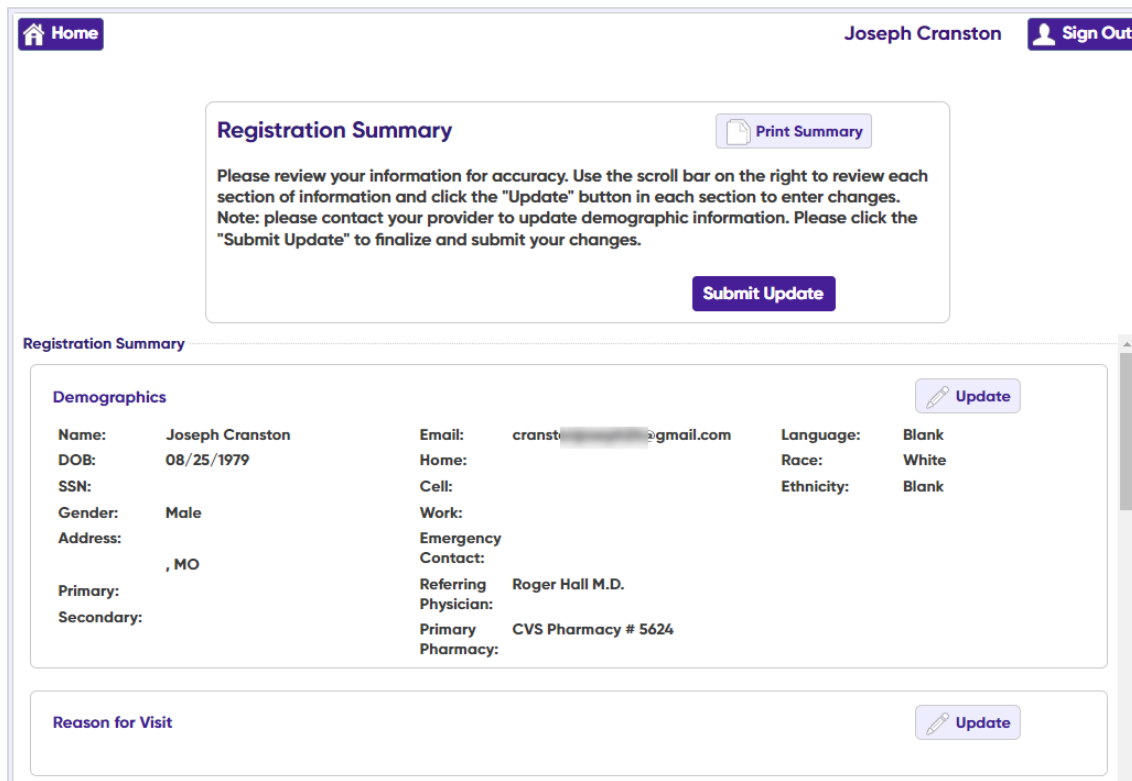
In the **Upcoming Appointments** area of the **Home** page, your next two appointments with your provider display. If necessary, use the gray scroll bar to navigate up and down to view the details of these two appointments.





Registering for your next appointment

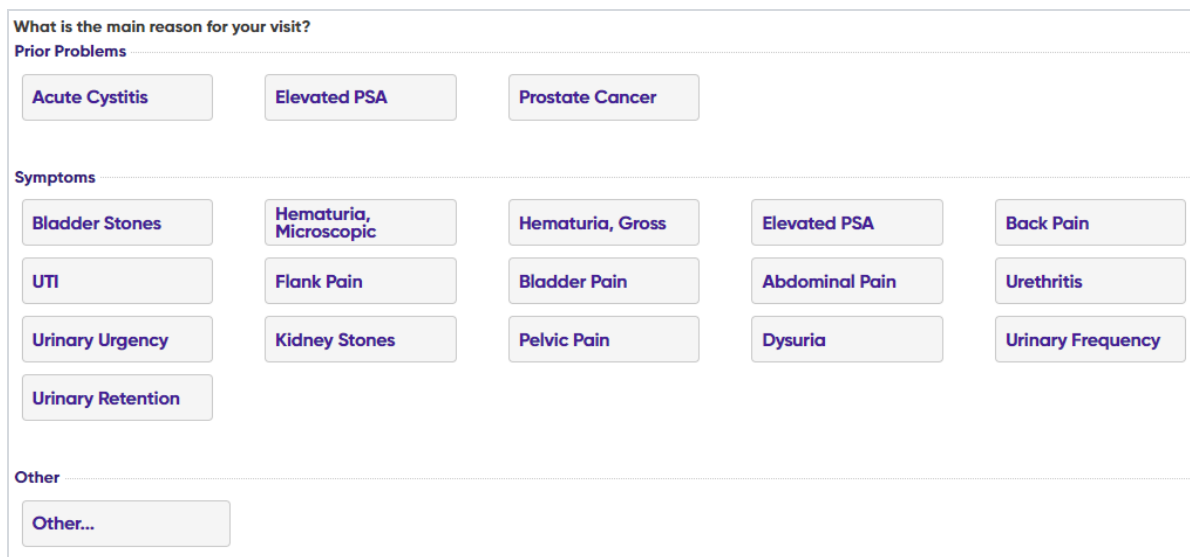
If your provider's office wants you to register for certain types of upcoming appointments, follow the steps below:

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



The screenshot shows the 'Registration Summary' page. At the top, there is a navigation bar with a 'Home' link, the user's name 'Joseph Cranston', and a 'Sign Out' button. Below this, a 'Registration Summary' section contains a 'Print Summary' button and a 'Submit Update' button. A message instructs the user to review their information for accuracy and use the scroll bar on the right to review each section. The 'Registration Summary' section is expanded, showing a 'Demographics' section with an 'Update' button. The 'Demographics' section contains the following information: Name: Joseph Cranston, Email: cranston@gmail.com, Language: Blank, DOB: 08/25/1979, Home: , Race: White, SSN: , Cell: , Ethnicity: Blank, Gender: Male, Work: , Address: , MO, Emergency Contact: , Referring Physician: Roger Hall M.D., Primary: , Primary Pharmacy: CVS Pharmacy # 5624, Secondary: . Below the 'Demographics' section 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. The question 'What is the main reason for your visit?' is displayed. Below this, there are three sections: 'Prior Problems', 'Symptoms', and 'Other'. The 'Prior Problems' section has three buttons: 'Acute Cystitis', 'Elevated PSA', and 'Prostate Cancer'. The 'Symptoms' section has ten buttons: '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', and 'Urinary Frequency'. The 'Other' section has one button: 'Other...'. The 'Other' section is currently selected.

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](#).

Home
Joseph Cranston Sign Out

1
 Demographics

2
 Reason For Visit

3
 Allergies

4
 Medications

5
 Procedures

6
 Conditions

7
 Family Conditions

8
 Social History

9
 Recent Problems

Return to Summary

?
 Help

6. When you finish any updates, select **Return to Summary** Return to Summary.

7. Select **Submit Update** Submit Update.

8. **Register Now** Register Now no longer displays beside your appointment.

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

Updating your information

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

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

Home

Joseph Cranston

Sign Out

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

DOB: 08/25/1979

SSN:

Gender: Male

Address: , MO

Primary:

Secondary:

Email: cransto...@gmail.com

Home:

Cell:

Work:

Emergency Contact:

Referring Physician: Roger Hall M.D.

Primary Pharmacy: CVS Pharmacy # 5624

Language: Blank

Race: White

Ethnicity: Blank

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

Update

Amoxicillin

Hives, Insomnia, Vomiting

Since January 1985

Penicillin

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

Home

Joseph Cranston

Sign Out

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)

No listed reactions

Started: unknown

Update

Remove

No listed reactions

Started: unknown

Update

Remove

Add an Allergy

Type here to search

Open

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.

Primary Pharmacy

CVS Pharmacy # 5624

4149 N OAK TRAFFICWAY, KAN...

Edit

To update at a later date, select **Edit**

Edit

.

3. Do one of the following:

- Select **Return to Summary**

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

Troubleshooting your pharmacy search

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

?

.

Pharmacy

Find a Pharmacy

herm

Current Pharmacy

No Pharmacy Selected

Your search -

herm

- did not match any pharmacies.

Suggestions:

- Make sure your spelling is correct.
- Eliminate any punctuation
- Shorten your search to the first 3 - 5 letters

If you are still having trouble finding the pharmacy:

1. Select the help button

?

2. Enter any other details next to your entry

3. Someone will help you at your next appointment

Accepts electronic prescriptions. Reduces wait times, increases safety, and Quality of Care.

Select

Cancel

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**

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**  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.

The screenshot shows the 'Add an Allergy' window. It has a search bar with the placeholder text 'Type here to search'. Below the search bar, there is a list of allergies. A red callout box points to the search bar with the text 'Select an allergy from the list...'. Another red callout box points to the search bar with the text '...or enter a minimum of 3 letters to search for an allergy not in the list.' The list of allergies includes 'Aspirin' and 'Cib...'.


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	3
Apr	May	Jun	20_	4	5	6
Jul	Aug	Sep		7	8	9
Oct	Nov	Dec			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.

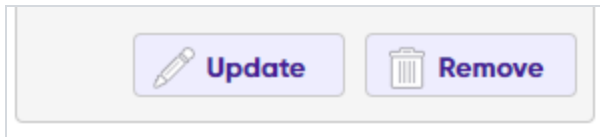
What reaction(s) do you have?

Hives	Nausea	Diarrhea
Itching	Insomnia	Shock
Trouble Breathing	Anemia	Redness
Swelling	Skin Rash	Vomiting
Hypersensitivity	Cardiac Arrest	Anaphylaxis
Photosensitivity	Respiratory Distress	Dizziness
Headache	Hyperactivity	

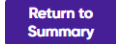

Other Reaction

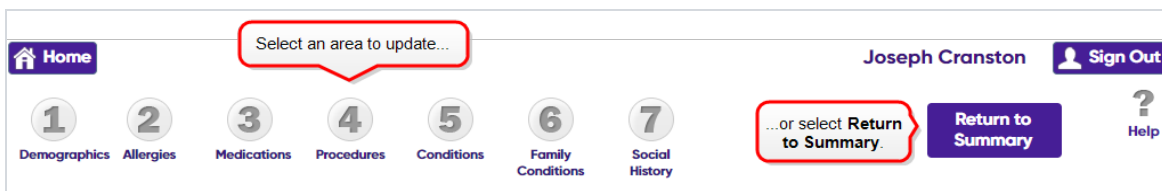
Done

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.

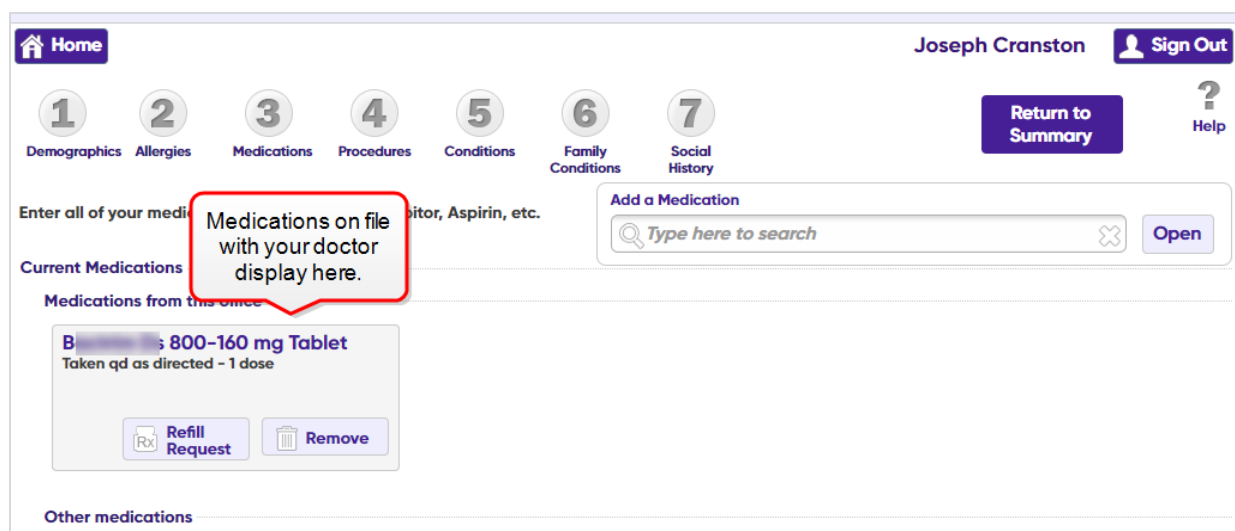



Updating medications

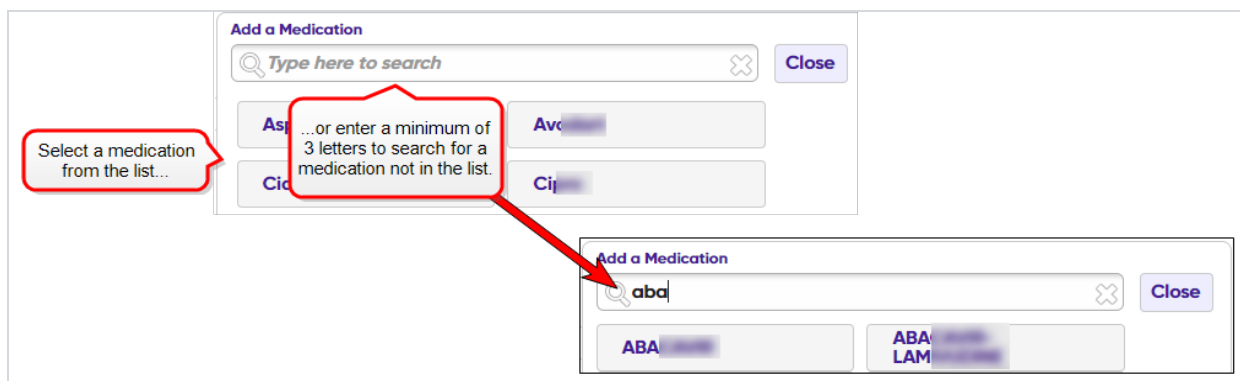


Remember to list all medications you're taking, including non-prescription medications such as vitamins and other supplements.

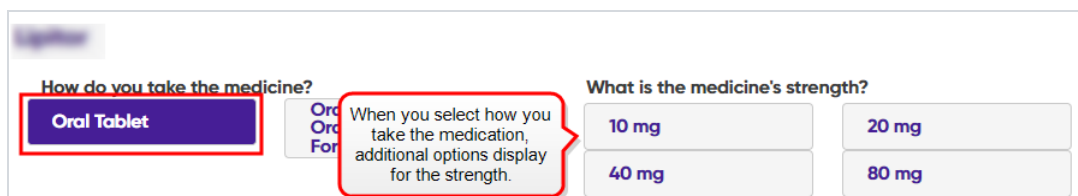
If you already have a prescription on file with this doctor's office, they display under **Medications from this office**.



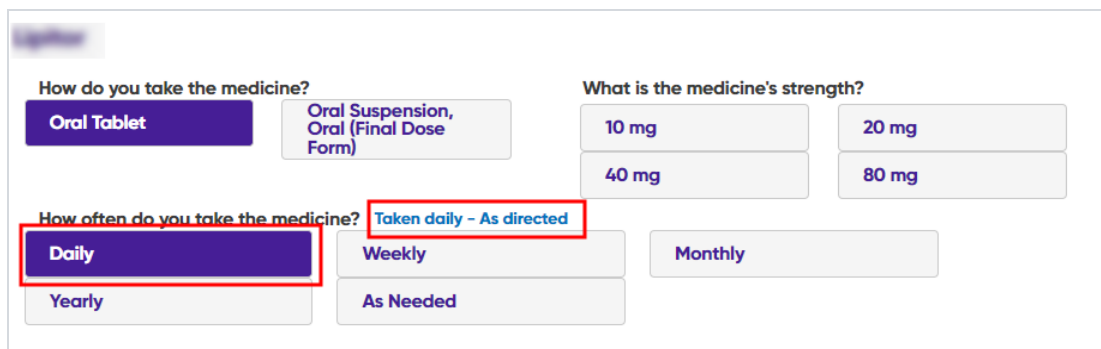
1. To add any medications, select **Open**  to expand the list of common medications, and then do one of the following:
 - Select an item from the list of common medications in the **Add a Medication** area on the right.
 - Enter a minimum of three letters in the search field to find a medication not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



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.






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

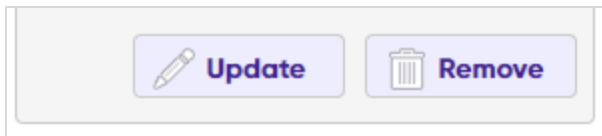


- Select the month and year you started taking the medication. If you don't know the



month, just select the year.

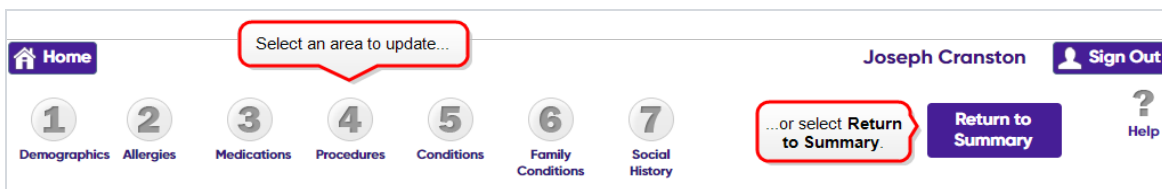
The screenshot shows a medication entry form. It includes sections for: 'How do you take the medicine?' with options 'Oral Tablet' (selected), 'Oral Suspension, Oral (Final Dose Form)', 'Weekly', and 'As Needed'; 'What is the medicine's strength?' with options '10 mg', '20 mg', '40 mg', and '80 mg'; 'How often do you take the medicine?' with options 'Daily' (selected), 'Weekly', 'Monthly', and 'Yearly'; and 'When did you start taking the medicine?' with a date picker showing 'January 2023'. A 'Done' button is at the bottom.

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.

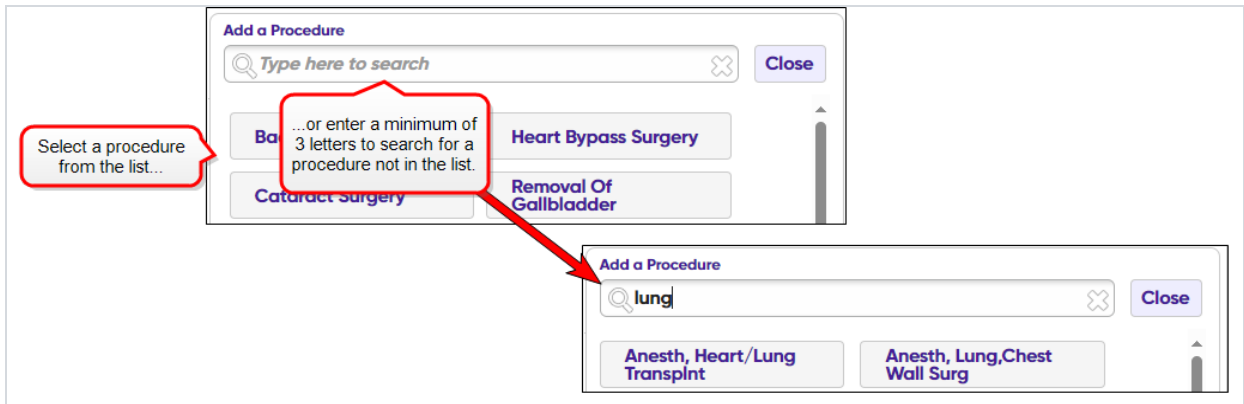


Updating procedures



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_

20_

1

2

3

4

5

6

7

8




9

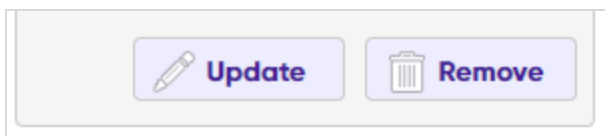
0

Done

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

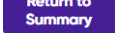



3. Select **Done** . The procedure information displays on the **Procedures** page. Use **Update**  to make changes, or **Remove**  to delete it from your chart.



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.



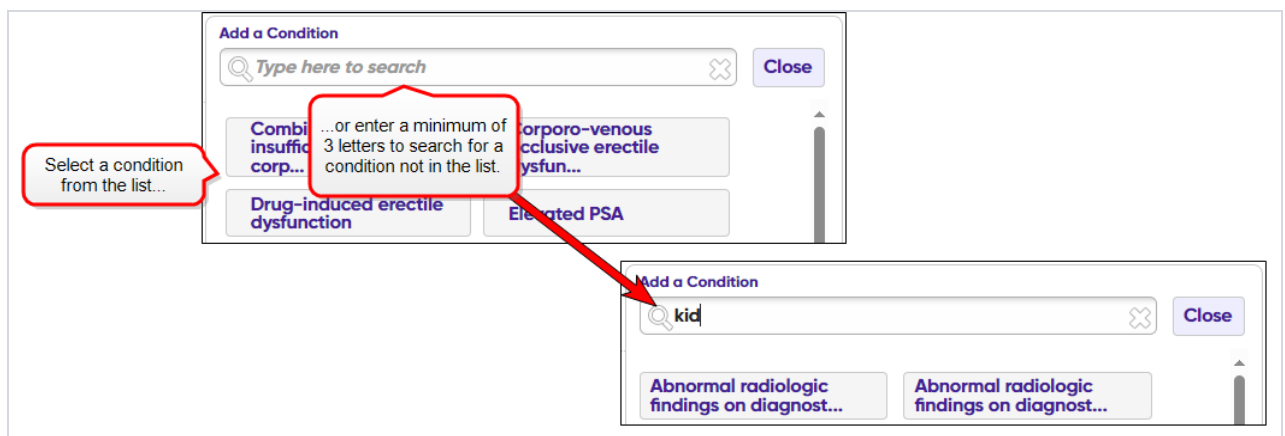
Updating medical conditions



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_

20_

1

2

3

4

5

6

7

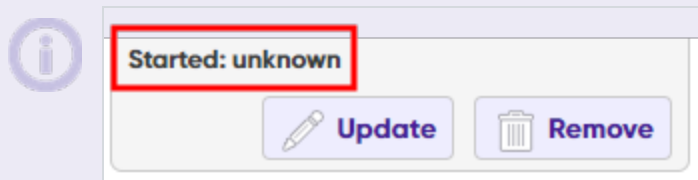
8




9

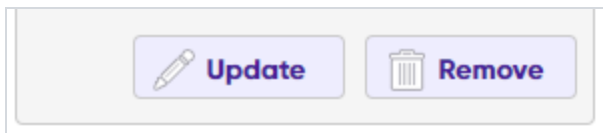
0

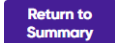

Done

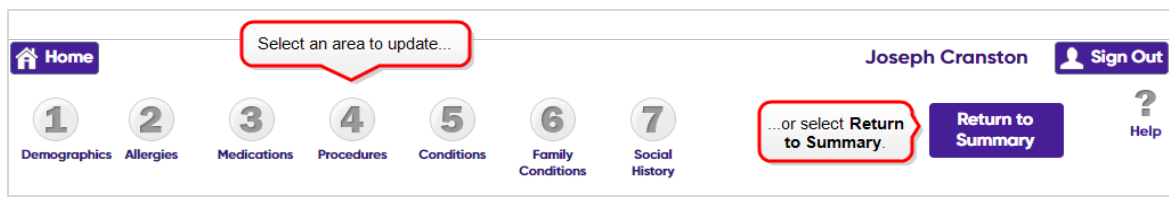
If you select unknown, that displays on the **Conditions** page instead of a date



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.

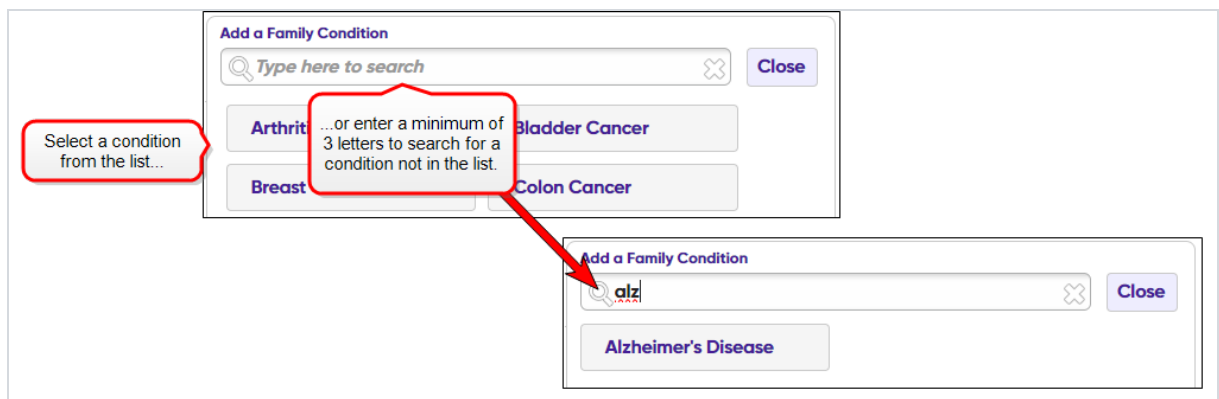





Updating family conditions

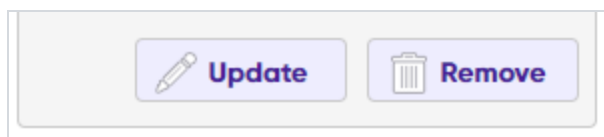


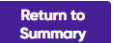
Use this area to enter information about your family's history of medical conditions.

- 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.



- In the window that opens, select the family member(s) with the condition.
- 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.



- Repeat the above steps until you finish adding all family conditions.
- 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

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)

[Terms](#) [Privacy](#) ©2024 IntrinsiQ Specialty Solutions, Inc. All rights reserved.

- **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**

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**



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** 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


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: johndoe@youremail.com
DOB:	01/01/1945	Home:
SSN:		Cell:
Gender:	Male	Work:
Address:	Springfield, MO	Emergency Contact:
		Referring Physician: John Smith
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, 2:16:05 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, Jos
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 Documents
- Upload My Documents

File Upload

URL Link Upload

New Document

Choose File

No file chosen

Add

Please select a Document Type

Lab Results, Patient-Provided

New Document

Transition of Care, Patient-Provided

	Document Name	Document Type	Added by	Remove
February 20th 2024, 6:31:51 AM	LabResult.pdf	Lab Results, Patient-Provided	Cranston, Joseph	<div></div>
4. Do one of the following:

• If uploading a file, select **Choose File**

Choose File

to locate and select the file, and then select **Add**

Add
- Upload My Documents

File Upload

URL Link Upload

Lab Results, Patient-Provided

Choose File

LabResult.pdf

Add
- The file displays in the list below, and a message displays that the document was saved successfully.
- Page 27 | Copyright 2024, AmerisourceBergen All Rights Reserved. Patient Portal User Guide 03/11/2024.

Duplication of this document’s intellectual content and methodologies, properties, or any portion therein, by any means, is prohibited. This document is subject to change.

Upload My Documents

Document saved successfully

☒ File Upload ☐ URL Link Upload

Please select a Document Type Choose File 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

New Document Choose File 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

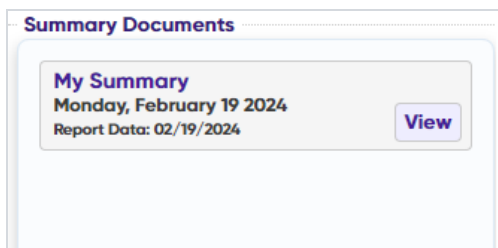
To

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

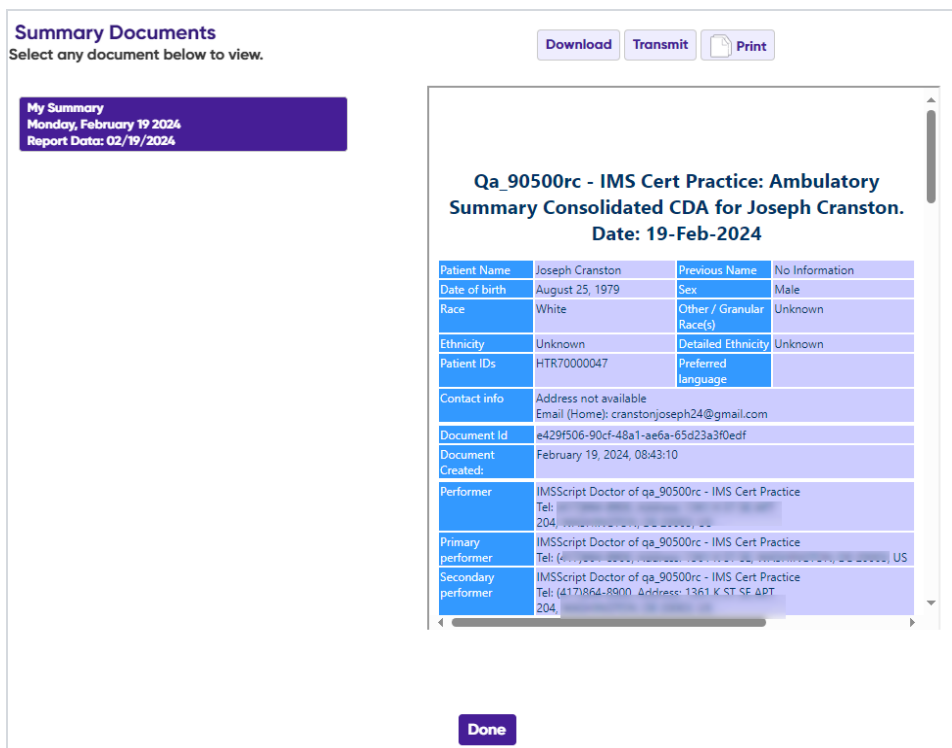
Generate

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.



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.medi
Nair	Venu	Nephrology Associ...	venu.nair.p119@direct

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 No
Best	Wayne	
Nair	Venu	Nephrolog
Message sent Successfully		

Printing the CCDA


To print the CCDA:

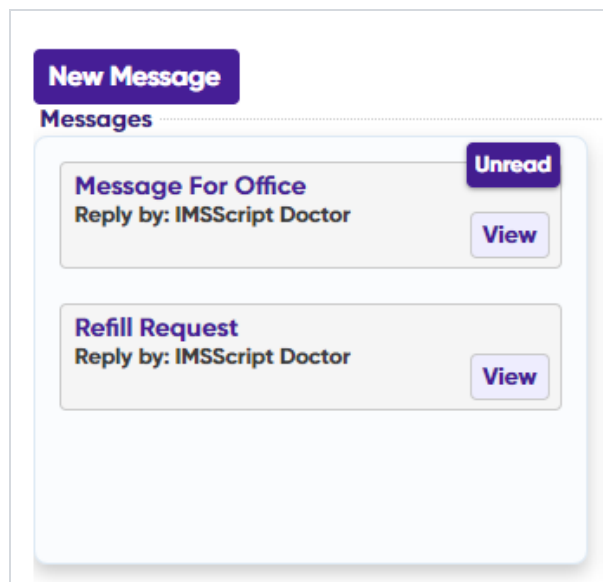
1. Select **Print** .
2. In the **Print** window that opens, select your printer, and then select **Print**.

Sending and receiving secure messages

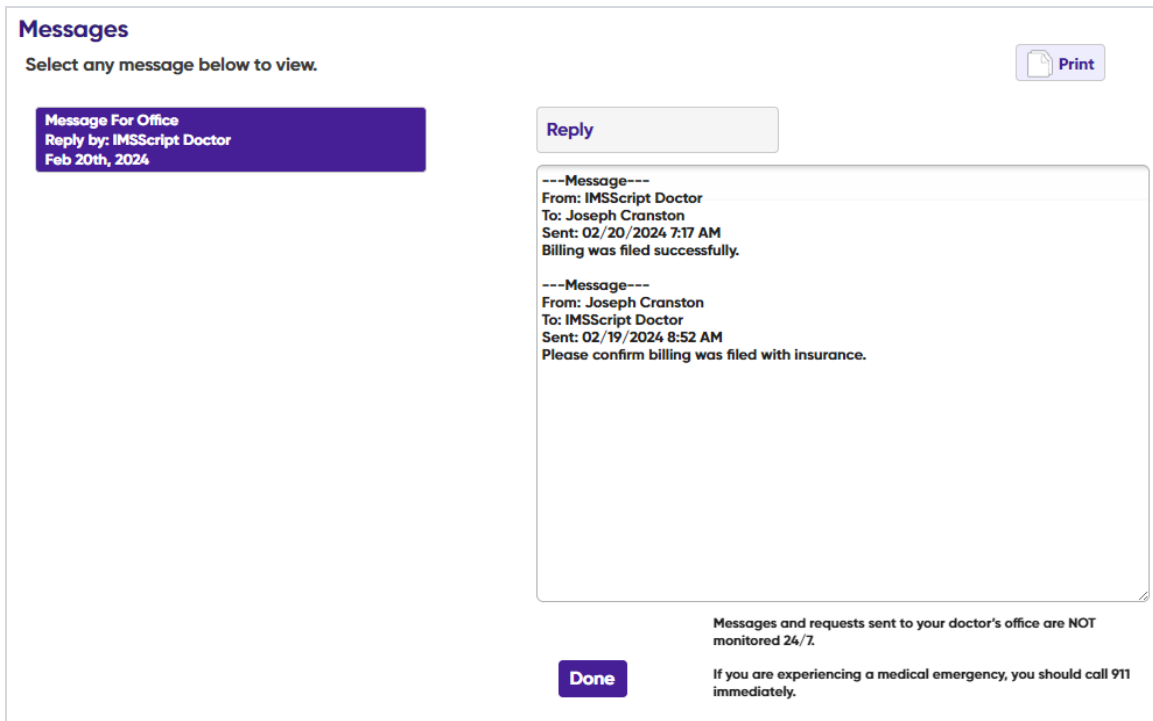
Viewing and replying to messages

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

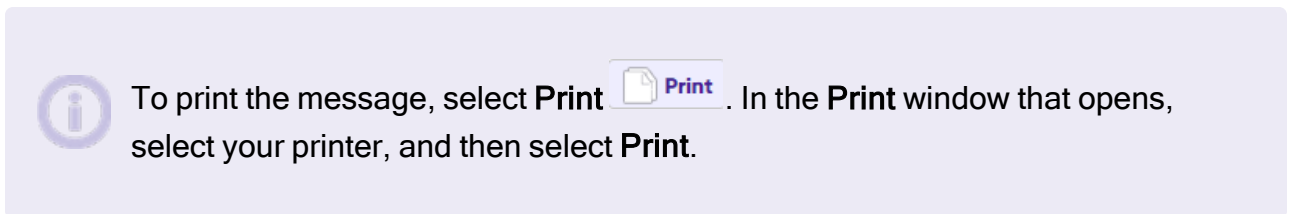
All messages display on the **Home** page. Unread messages display **Unread** .



1. Click a message to open it.




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



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.

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.

- 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.

Documents and Lab Results

Office Visit

Tuesday, February 20 2024

Referral Letter

Tuesday, February 20 2024

Return Visit

Monday, February 19 2024

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 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

Referral Letter
Tuesday, February 20 2024 Unread

Return Visit
Monday, February 19 2024

X-Ray Order
Monday, February 19 2024

X-Ray Order
Monday, February 19 2024

X-Ray Order
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: [REDACTED]

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
DOB: 08/25/1979, 44 year old Male
SSN:

PRIMARY CARE:
REFERRING:
PROVIDER: IMSS
LOCATION: qa_96

CC: None

ALLERGIES: n - Insomnia, Hives, Vomiting

MEDICATIONS: Bactrim Ds 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

Use the gray scroll bar to move up and down the page.

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

- To download the document, select

Download

.

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

Print

.

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

Print

Total: 2 sheets of paper

Printer

HPB0D677 (HP DeskJet 4100 s...)

Copies

1

Layout

☒ Portrait

☐ Landscape

Pages

☒ All

☐ Odd pages only

☐ Even pages only

☐ e.g. 1-5, 8, 11-13

Color

Color

[More settings](#)

[Print using system dialog... \(Ctrl+Shift+P\)](#)

Print Cancel

2/2024, 8:34 AM

Office Visit

OFFICE VISIT REPORT 02/20/2024

Joseph Cranston

MRN: WTR70000047
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: Insomnia, Hives, Vomiting

MEDICATIONS: 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 HISTORY: Alzheimer's Disease - Runs In Family

SOCIAL HISTORY: Marital Status: Unknown
Race: White
Current Smoking Status: Patient smokes occasionally.
Does drink.
Does not drink caffeine.
Has not had a blood transfusion.

REVIEW OF SYSTEMS:

Test System One: Testing System One Male.
Patient denies button 1, button 2, and button 3.

Test System Two: Testing System Two Male.
Patient denies button 1, button 2, and button 3.

Constitutional: Test.
Patient denies fever, chills, weight loss, and sore throat.

Eyes: Patient denies blurry vision, double vision, and cataracts.

Ears, Nose, Mouth, Throat: Patient denies hearing loss, sore throat, and nasal stuffiness.

Cardiovascular: Patient denies chest pains, swollen ankles, and irregular heartbeat.

Respiratory: Patient denies shortness of breath, wheezing, and chronic cough.

Gastrointestinal: Patient denies abdominal pain, nausea/vomiting, and change in bowels.

Genitourinary: Patient denies incontinence, painful urination, and blood in urine.

Musculoskeletal: Patient denies chronic back pain, chronic neck pain, and sore muscles.

Integumentary/Skin: Patient denies rash, persistent itching, and skin cancer history.

Neurological: Patient denies numbness, tingling, and dizziness.


Hematologic/Lymphatic: Patient denies swollen glands, abnormal bleeding, and transfusion history.

VITAL SIGNS: None

about blank

2/2024, 8:34 AM

Office Visit

- Select **Done**  when you finish reviewing the document.

Saving the Patient Portal on your phone

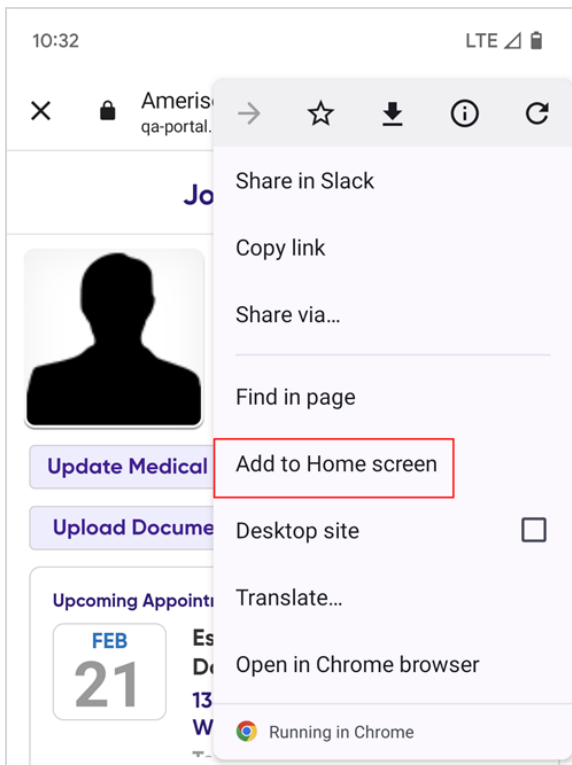
Android

Chrome

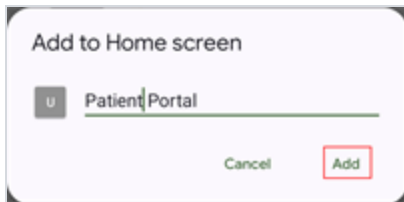
- After opening the Patient Portal in the Chrome browser, tap the 3 dots in the top right of your screen.



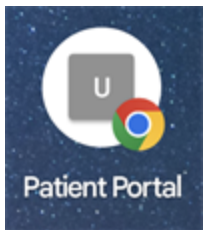
- Tap **Add to Home screen**.



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

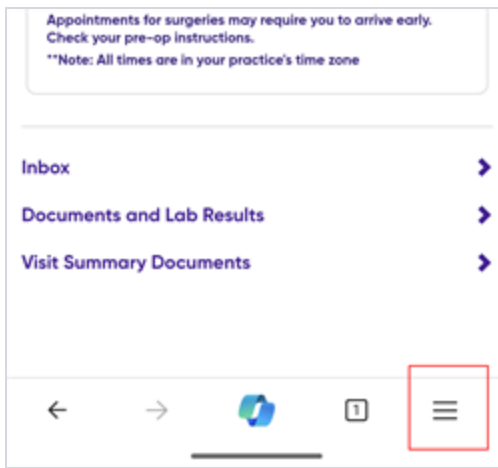


An icon displays on your home screen.

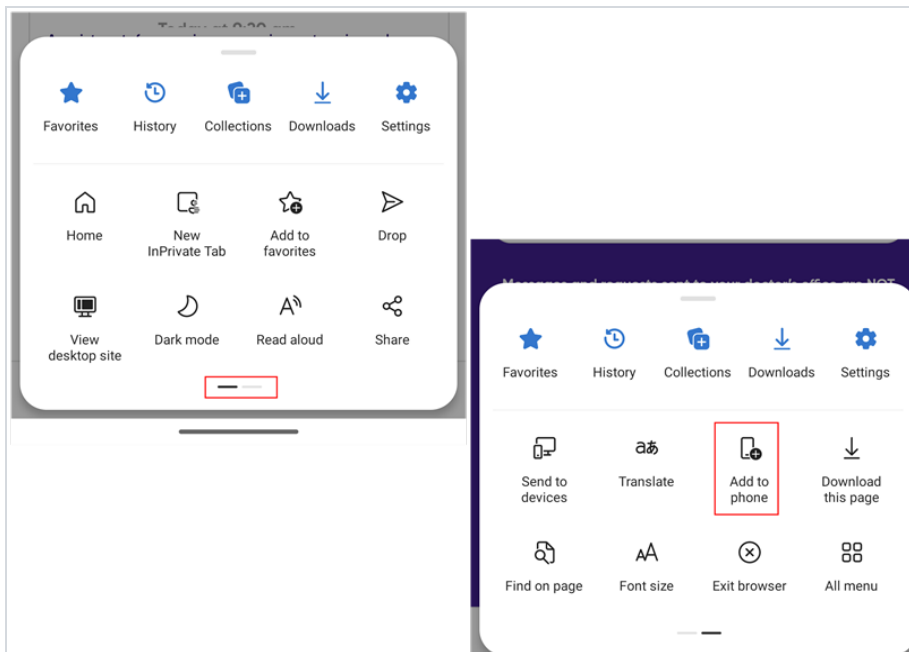


Edge

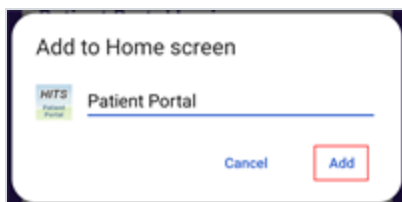
1. After opening the Patient Portal in the Edge browser, tap the menu icon at the bottom of the screen.



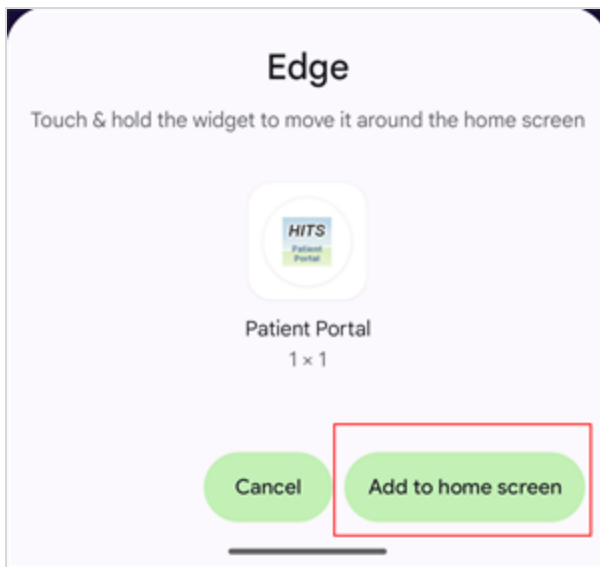
2. Swipe left to get to the 2nd screen, and tap **Add to phone**.



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.

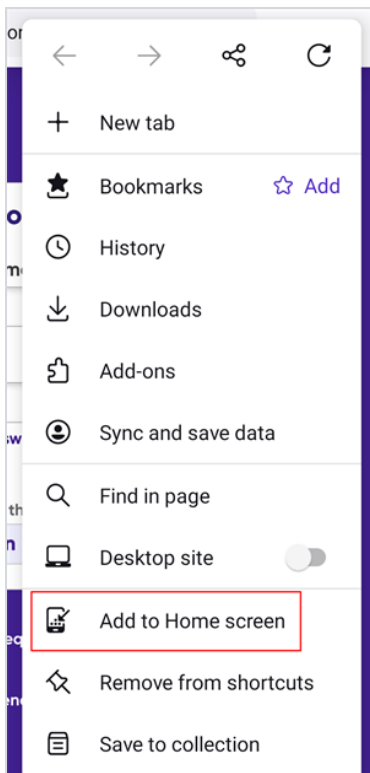


Firefox

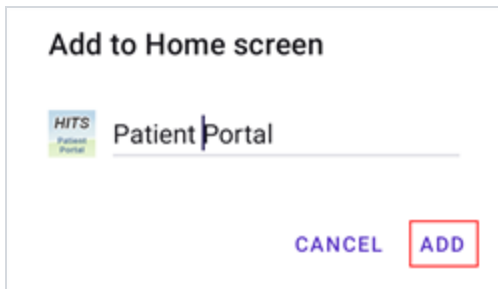
1. After opening the Patient Portal in the Firefox browser, tap the 3 dots in the top right of your screen.



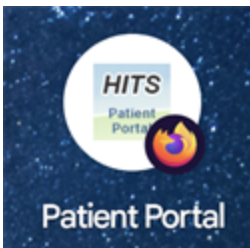
2. Tap **Add to Home screen**.



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



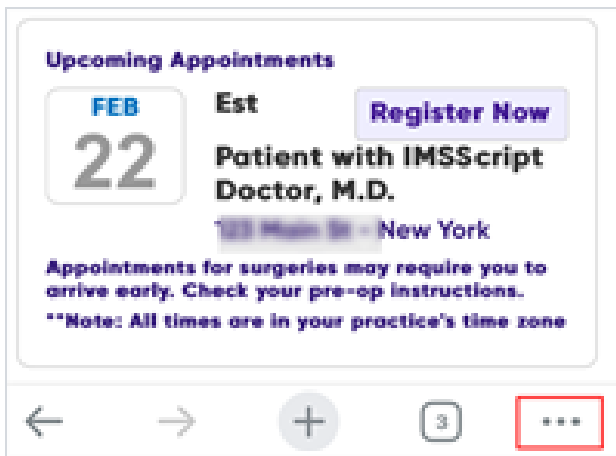
An icon displays on your home screen.



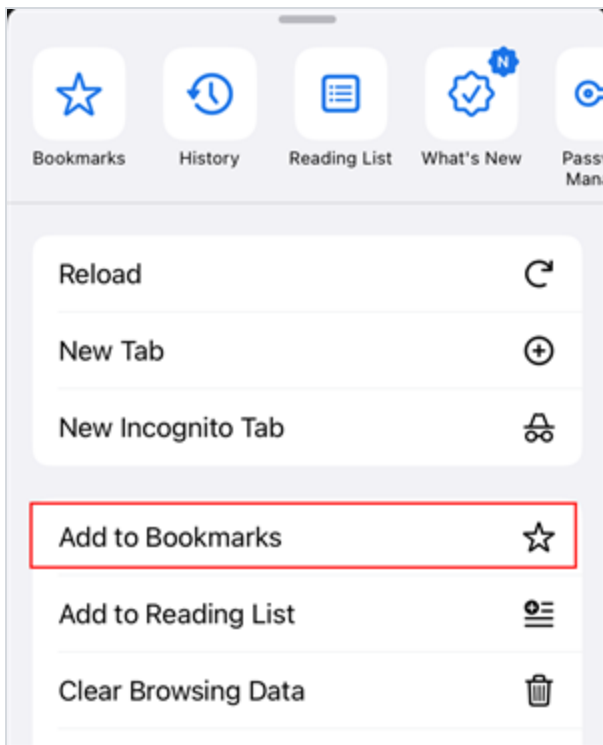
iPhone

Chrome

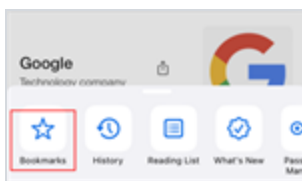
1. After opening the Patient Portal in the Chrome browser, tap the 3 dots in the bottom right of your screen.



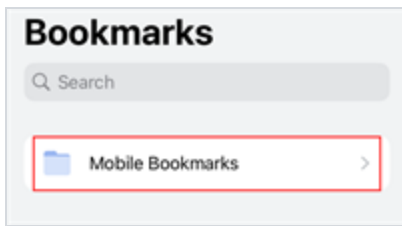
2. Scroll down the list and tap on **Add to Bookmarks**.



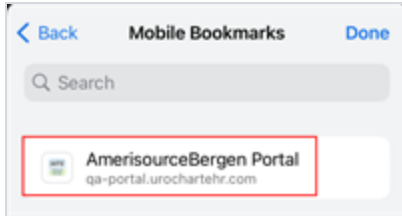
3. When you open Chrome at another time, if Chrome doesn't default to the Portal, tap the three dots in the bottom right of your screen, and then tap **Bookmarks**.



4. Tap on **Mobile Bookmarks**.

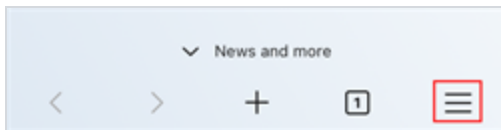


5. Tap the Portal bookmark to open the Patient Portal.

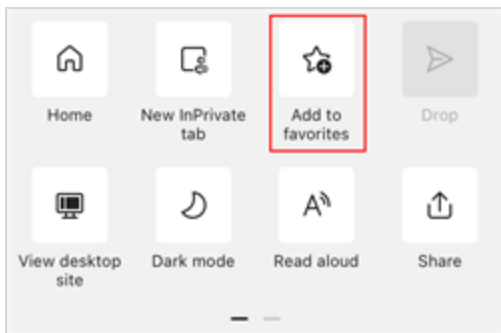


Edge

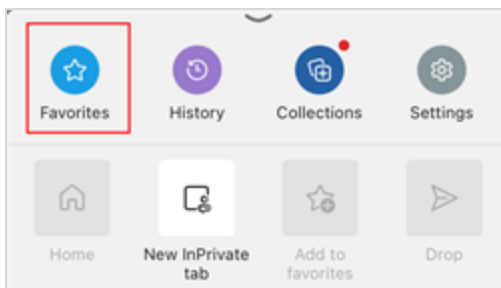
1. After opening the Patient Portal in the Edge browser, tap the menu icon at the bottom of the screen.



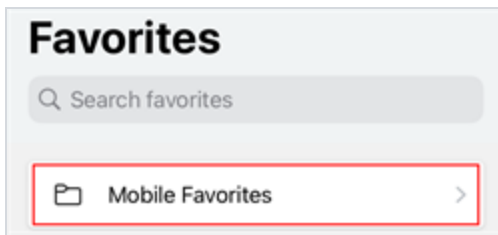
2. Tap **Add to favorites**.



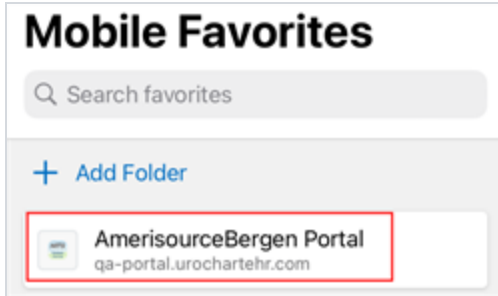
3. When you open Edge at another time, if Edge doesn't default to the Portal, tap the menu icon at the bottom of the screen and tap on **Favorites**.



4. Tap on **Mobile Favorites**.

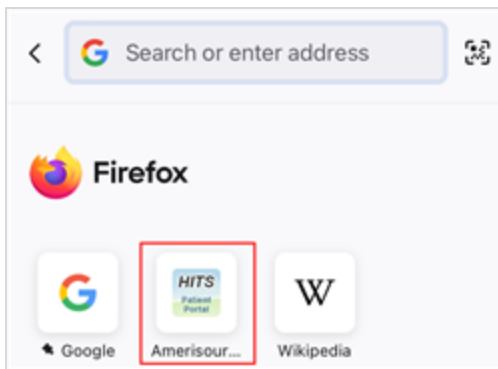


5. Tap on the Portal bookmark.

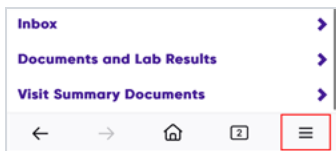


Firefox

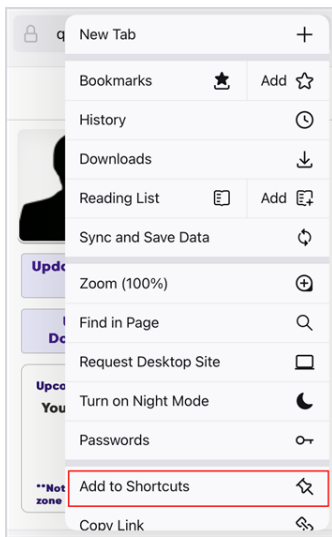
1. After opening the Patient Portal in the Firefox browser, Firefox automatically adds an icon to the home screen.



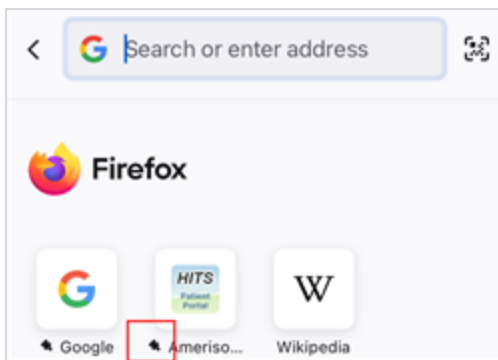
2. To pin it to the home screen, tap the menu icon at the bottom of the screen.



3. Tap Add to Shortcuts.

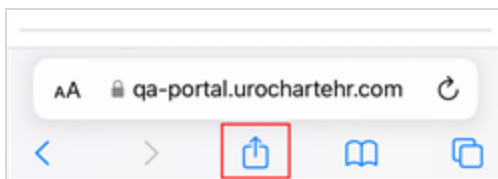


4. Firefox pins the shortcut to the home screen so it will always display there.

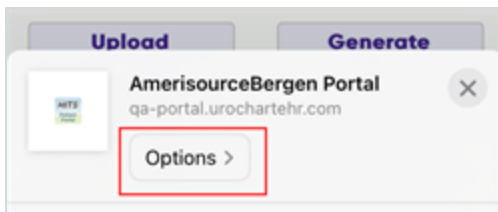


Safari

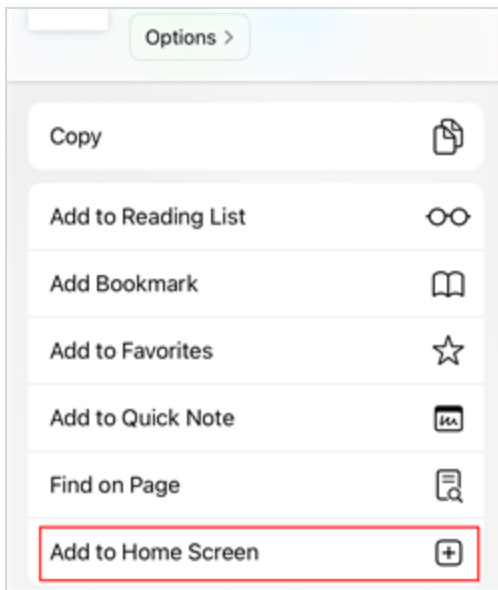
1. After opening the Patient Portal in the Safari browser, tap the share icon.



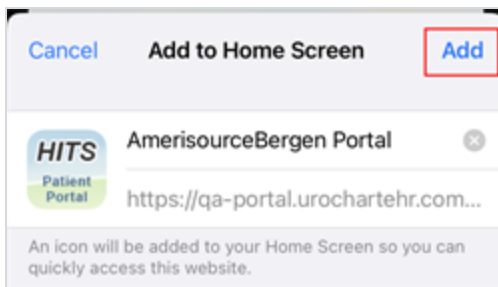
2. Tap on **Options**.



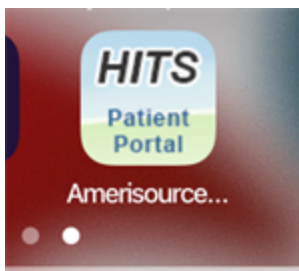
3. Tap **Add to Home Screen**.



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 tap on **New Document**.

• Please select a Document Type

✓ Please select a Document Type

Lab Results, Patient-Provided

New Document

Transition of Care, Patient-Provided



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.

Upload My Documents

☒ File Upload ☐ URL Link Upload

• New Document

Choose File no file selected

Photo Library

Take Photo

Choose File

Document Name

result.pdf

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

Choose File

no file selected

Add

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

5. Tap **Done**

Done

.