Patient Portal
User Guide
(Patient View)

(This Page Intentionally Left Blank)

Table of Contents

Overview

The **Acumen nEHR® Patient Portal** is an online application that allows patients or authorized representatives of the patient to log in and access upcoming appointments and clinical information, such as medications, allergies, problems, lab results, vital signs, and more.

The Patient Portal User Guide provides instructions for logging in and navigating the Patient Portal, as well as printing/downloading clinical information and messaging the provider (doctor's office) through a secure messaging system.

Note: The secure messaging system is activated at the discretion of the provider (doctor's office) and may not be available to all patients.

Logging Into the Patient Portal

The Patient Portal can be accessed by a patient or authorized representative of the patient from any computer with Internet connectivity.

Note: A patient or authorized representative of the patient is referred to as a **user** of the Patient Portal throughout this user guide.

Follow the steps below for logging into the Patient Portal:

1. Access the following website in an Internet browser: https://myhealth.acumenehr.com.
2. Type the **Username** and temporary **Password** assigned by the provider (doctor's office) in the text boxes.
3. Click the **Sign In** button.

4. Click the **Continue** link to change the temporary password. A user is automatically prompted to change the temporary password upon logging in for the first time to the Patient Portal.

Password Change Force

In accordance with security settings set forth by your provider's organization, you must change your password to continue.

Until you do so, you will no longer be able to use the portal.

Reason for change:
You have logged in for the first time. You must change your password.

Continue

5. Type the **Current Password** (temporary password).
6. Type a new password in the **Enter New Password** text box. The new password must meet the requirements that display on the page.
7. Type the new password again in the **Confirm New Password** text box.
8. Select a question in the **Secret Question** drop-down menu.
9. Type the answer in the **Secret Answer** text box.
10. Click the **Change Password** button.

Larry Southwood

Logout

ACUMEN PHYSICIAN SOLUTIONS

| Appointments | Health Record | Messages/Uploaded Images | Profile |

58:42 remaining in session

Profile for Larry Southwood

Account Management

Current Password: * ••••••
Enter New Password: * ••••••
Confirm New Password: * ••••••
Secret Question: Where were you born?
Secret Answer: *

Change Password

Passwords ARE case sensitive.
Passwords CANNOT contain your First, Middle, Last, or User Names.
Password must be at least 6 characters long.
Password cannot be used within the last 2 changes.
Password CANNOT be a 'Dictionary' word.
Password is valid for 90 days.
Your account will be locked with 5 failed login attempts in 5 minutes.
* Required

Message Your Provider's Office

Demographics

Account Management

Activity Log

11. Click the **OK** link on the **Password Confirmation** pop-up window.

Password Confirmation

Your information has been updated successfully.
You will now be redirected to the portal.

OK

12. Click the **Yes** radio button to agree to the Terms of Use. This prompt only displays upon first log in. If the **No** radio button is selected, the user cannot access the Patient Portal.

13. Click the **Submit** button.

Terms of Use Acceptance

TERMS OF USE

Last updated and effective as of August 22, 2013

Welcome to the Acumen Patient Portal website (the "**Site**"). This Site is ow
Acumen Physician Solutions, LLC or one or more of its direct or indirect aff
the "**Company**," "**we**" or "**us**"). This Site serves as a Patient Portal that pro
ability to exchange secure messages with your health care provider and may
features in the future.

1.   ACCEPTANCE OF TERMS OF USE AND WEBSITE PRIVACY PC

To access or use this Site, you must agree to be bound by the following te
("**Terms   of   Use**")   and   our   website   privacy   poli
https://myhealth.acumenehr.com/EHR/Admin/Documents/PrivacyPolicy

8.50 x 11.00 in

Do you agree to the Terms of Use identified above?

◉ Yes   ○ No   Submit

Note: The **Terms of Use** can be accessed at any time by clicking the link located at the bottom left corner of the Patient Portal page.

Terms Of Use   © 2017 Acumen Physician Solutions, LLC - All Rights Reserved (ACUEHRWEBPD07)   Privacy Policy
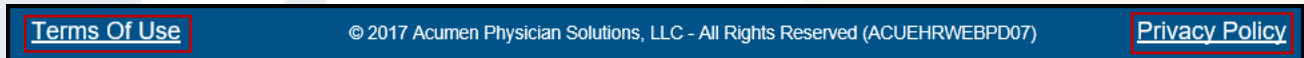
The **Privacy Policy** link is also available in the bottom right corner of the Patient Portal page.

WEBSITE PRIVACY POLICY

Last updated and effective as of August 22, 2013

Welcome to the Acumen Patient Portal website (the "**Site**"). This Site is owned and operated by Acumen Physician Solutions, LLC, or one or more of its direct or indirect affiliates (collectively, the "**Company**," "**we**" or "**us**"). This Site serves as a Patient Portal that provides you with the ability to exchange secure messages with your health care provider and may provide other features in the future.

We respect your privacy and are committed to protecting it through our compliance with this privacy policy (the "**Website Privacy Policy**") for this Site. This Website Privacy Policy describes the types of information we may collect from you or that you may provide when you

Patient Portal Header

The Patient Portal header is the top section of the home page and is visible throughout the website. The current date, time, and the logged in user's name (patient's or authorized representative's name) is listed at the top right.

A user can click the **Change Password** link at any time to change the password.

A **Logout** link is also available for clicking to exit the Patient Portal.


If an authorized representative has access to more than one Patient Portal account, or if an authorized representative is also a patient with the same provider (doctor's office), the user can log into the Patient Portal with the same username and password. The user can then select his/her name or another patient's name from the **Patient** drop-down menu.

A red timer is located at the top right of the home page directly beneath the header throughout the website. It displays a count-down of the remaining time a user has until the Patient Portal logs the user out due to inactivity. The timer restarts when a user performs an action in the Patient Portal. The default timeframe is defined by the provider (doctor's office).
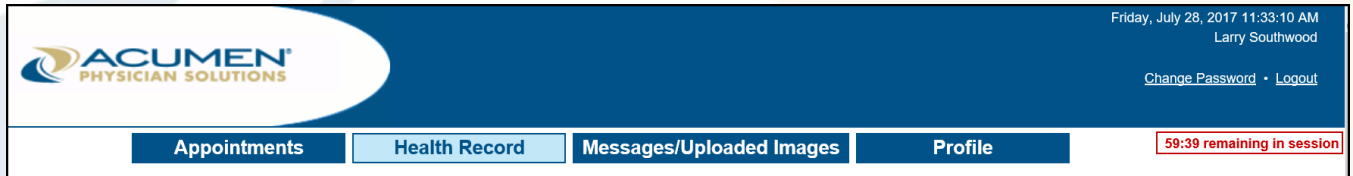
A pop-up window with a Session Timeout Warning displays 30 seconds before a user is logged out. Click **Continue Working** on the warning window to stay logged into the Patient Portal and reset the timer. Or, click **Go Ahead and Logout** to exit the Patient Portal.
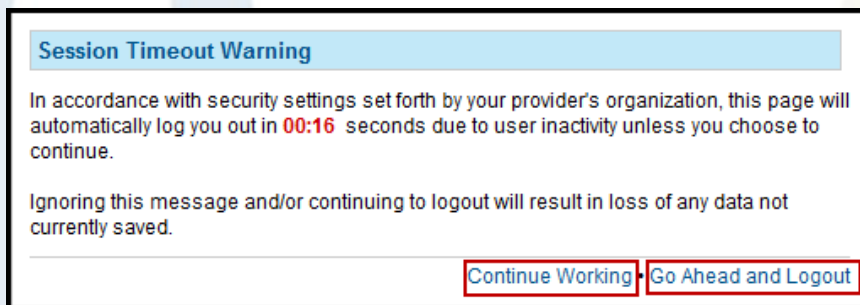
Navigating the Patient Portal

The Patient Portal is organized into four tabs across the top of the page under the header: Appointments, Health Record, Messages/Uploaded Images, and Profile. Each tab contains specific patient information, as well as additional action buttons for that tab. The selected tab displays in light blue.

Friday, July 28, 2017 11:54:39 AM				
Larry Southwood				
Change Password • Logout				

ACUMEN PHYSICIAN SOLUTIONS

57:30 remaining in session

Appointments	Health Record	Messages/Uploaded Images	Profile

Health Record for Larry Southwood

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/28/2017	135/85		210 lbs	31
3/1/2017	140/90		205 lbs	30.3
12/22/2016	140/90		250 lbs	36.9

Lab Results

Medications and Allergies

Care Plan

Problems

Message Your Provider's Office

Download Health Record

Send Health Record

If the secure messaging system is <u>not</u> activated, the **Messages/Uploaded Images** tab and the **Message Your Provider's Office** action button do not display and are not available options in the Patient Portal.

Friday, July 28, 2017 01:04:58 PM		
Larry Southwood		
Change Password • Logout		

ACUMEN PHYSICIAN SOLUTIONS

59:36 remaining in session

Appointments	Health Record	Profile

Health Record for Larry Southwood

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/28/2017	135/85		210 lbs	31
3/1/2017	140/90		205 lbs	30.3
12/22/2016	140/90		250 lbs	36.9

Lab Results

Medications and Allergies

Download Health Record

Send Health Record

Note: The secure messaging system is activated at the discretion of the provider (doctor's office) and may not be available to all patients.

Health Record Tab

After logging into the Patient Portal, the page defaults to the Health Record tab. This tab is organized into 10 sections: Vital Signs, Lab Results, Medications and Allergies, Care Plan, Problems, Immunizations, Diagnostic Images, Implantable Devices, Procedures, and Smoking Status.

Vital Signs

The Vital Signs section is automatically expanded. It displays the **Date Received** (date of visit), **Blood Pressure**, **Pulse**, **Weight**, and **BMI** (Body Mass Index). Vital Signs results are displayed with the most recent result at the top.

Click any column header to sort the results by that column name. Click the section name or the white double arrows in the top right of each section to expand the section or collapse the section .

Appointments	Health Record	Messages/Uploaded Images	Profile	57:30 r

Health Record for Larry Southwood

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/28/2017	135/85		210 lbs	31
3/1/2017	140/90		205 lbs	30.3
12/22/2016	140/90		250 lbs	36.9

Lab Results

Medications and Allergies

Care Plan

Problems

Immunizations

Diagnostic Images

Implantable Devices

Procedures

Smoking Status

Message Your Provider's Office

Download Health Record

Send Health Record

Lab Results

The Lab Results section displays results organized by **Date** (date labs were drawn), with the most recent date at the top of the list. A **Panels** column that lists the name of the lab test panels also displays. Click the **Date** column to sort the results by date.

Select a **Date Range** in the drop-down menu to display results for the current month (default), last 3 months, last 6 months, or last 12 months. Click a date in the **Date** column to view the results for that entry date, or lab draw date. Click the date again to hide the results.

The lab results include the **Test Name**, **Result**, the **Normal** range, and if it is **Abnormal**. In the **Abnormal** column, an **L** indicates the test results were lower than the normal range, a **H** indicates the test results were higher than the normal range, and a dash (**-**) indicates the test was not abnormal.

A note displays below the Lab Results section instructing patients to review their health information and contact their provider (doctor's office) for more information and/or assistance with interpreting the results.

Health Record for Larry Southwood

Vital Signs

Lab Results

Date Range: Last 12 Months ▾

Date	Panels
5/30/2017	Basic Dialysis Labs, Comp Dialysis Labs
3/21/2017	Basic Dialysis Labs, Comp Dialysis Labs

Basic Dialysis Labs

Test Name	Result	Normal	Abnormal	Education
Phosphorus	4 mg/dL	2.5-4.9	-	
Potassium, Serum	4 mEq/L	3.5-5.0	-	
spKt/V	1.53 mL/min		-	

Comp Dialysis Labs

Test Name	Result	Normal	Abnormal	Education
25 Hydroxy Vit D	55 ng/mL	30-74	-	
Albumin	4.2 g/dL	3.2-5.6	-	
Alkaline Phosphatase	175 IU/L	50-136	H	
BUN (Urea Nitrogen)	70 mg/dL	7-23	H	
Calcium, Serum	9.7 mg/dL	8.5-10.1	-	
Creatinine, Serum	7 mg/dL	0.6-1.3	H	
Ferritin	101 ng/dL	3-244	-	
Glucose, Serum	122 mg/dL	70-100	H	
HCO3 (Bicarb)	265 meq/L	22-29	H	
Hemoglobin	7 g/dL	13.0-18.0	L	
Hemoglobin A1C	130 x10E/uL	0.0-0.2	H	
Magnesium	2.2 mg/dL	1.3-2.4	-	
PTH	370 pg/mL	15.00-65.00	H	
Sodium, Serum	146 mEq/L	132-145	H	
Transferrin Saturation (T-Sat)	22 %	20-55	-	
URR	80 %	65-80	-	
WBC	10 k/uL	4.8-10.8	-	

Date	Panels
8/15/2016	CBC Fishbone
8/14/2016	Hemoglobin A1c

Please carefully review the health information displayed above. Contact your healthcare provider if you have any questions or concerns regarding the information shown or need assistance interpreting the results.

Note: Asterisks ***** in the Result column of the Lab Results section indicate that the results are not readily available in the Patient Portal. A corresponding note is displayed below the Lab Results section instructing patients to contact their provider (doctor's office) for more information.

Date	Panels				
2/28/2014	HIV 1/2 Ab				

HIV 1/2

Test Name	Result	Normal	Abnormal	Education
HIV 1/2 Ab	*****	Non Reactiv	-	

| 2/21/2014 | CIRR | | | | |

Please carefully review the health information displayed above. Contact your healthcare provider if you have any questions or concerns regarding the information shown or need assistance interpreting the results.

***** *At the provider's direction, all results for this type of test are only to be released after consultation with your provider. Please contact your provider directly for more information.*

Medications and Allergies

The Medications and Allergies section is divided into 2 lists: **Medication List** and **Allergy List**. The Medication List includes the name of the **Medication**, the **Strength**, **Directions** for taking the medication, and an **Education** column.

The Medication List can be filtered by **Active** (default) and/or **Stopped** medications. Check the boxes to display the selected medications or uncheck the boxes to filter them out. Click the **Education** link in the **Education** column next to a medication to access online information, provided by MedlinePlus, regarding the medication.

Click the **Medication** or **Strength** column headers on the Medication List or the **Allergy** column header on the Allergy List to sort the information by the column name. The information is sorted alphabetically in the Medication or Allergy column on both lists by default.

Note: The generic name of a medication displays in parentheses next to the brand name. Otherwise, the generic name displays by itself.

Medications and Allergies

Medication List

Filter: ☑ Active ☐ Stopped

Medication	Strength	Directions	Education
acetaminophen	500 mg	Take 1 tablet by mouth once a day as directed. Take as needed for back pain	Education
Cozaar (losartan)	50 mg	Take 1 tablet by mouth once a day as directed. Do not drive while taking this medication Please take on a full stomach	Education
furosemide	20 mg	Take 1 tablet by mouth once a day as directed	Education
Lexapro (escitalopram)	10 mg	Take 1 tablet by mouth once a day as directed	Education
Norvasc (amlodipine)	5 mg	Take 1 tablet by mouth once a day	Education

Allergy List

Allergy
aspirin
Biaxin (clarithromycin)
Iodine-Iodine Containing Group
latex
Levaquin (levofloxacin)
Nsaids Group

Care Plan

The Care Plan section displays the care plan entered in the patient's Clinical Summary.

Care Plan	⇑
Continue the current blood pressure medications. Check BP daily and record on log. Maintain a low sodium diet. Immediately report any symptoms such as severe headache, fatigue or confusion to your provider.	

Problems

The Problems section displays a patient's medical conditions. The list includes the **Description** of the problem, the **Status** of a problem, and an **Education** column.

Problems can be filtered by an **Acute** (default), **Chronic** (default), or **Resolved** status. Check the boxes to display the selected problems or uncheck the boxes to filter them out. Click the name of a problem in the **Education** column to access online information, provided by MedlinePlus, regarding the problem.

Click the **Description** column header or the **Status** column header to sort the information by the column name. The information is sorted alphabetically in the **Description** column by default.

Problems

Filter: ☑ Acute ☑ Chronic ☐ Resolved

Description	Status	Education
Diabetes mellitus	Chronic	Diabetes mellitus
Elevated blood pressure reading without diagnosis of hypertension	Chronic	Elevated blood pressure reading without diagnosis of hypertension
END STAGE RENAL DISEASE	Chronic	End stage renal disease
Motion sickness	Acute	Motion sickness
Severe asthma	Chronic	Severe asthma

Immunizations

The Immunizations section contains the vaccinations a patient has received or declined.   The date the immunization was given or offered is listed in the **Date** column and the corresponding type of immunization is listed in the **Immunization** column. If the immunization was refused by the patient, **Declined** displays to the right of the immunization name.

Click the **Date** column header or the **Immunization** column header to sort the information by the column name. The information is sorted by the **Date** column by default, with the most recent date and immunization at the top of the list.

Click the **Choose Immunizations** link to filter the immunizations by type. The default is 0 Active Filters, which displays all immunizations received or declined by the patient.

Immunizations	
Filter: **Choose Immunizations** (0 Active Filters)	
Date	**Immunization**
03/27/2013	pneumococcal polysaccharide PPV23
03/01/2013	Tdap
02/15/2013	DTaP Declined
02/15/2013	varicella
05/31/2012	Hep A, adult
11/15/2011	Influenza, seasonal, injectable

The scrolling window defaults to all the available immunization types as selected. Click any individual box to deselect an immunization. Or, click **Clear All** to uncheck all the boxes of immunization types and then check individual boxes of each immunization to display. Click **Select All** to check all of the boxes.

Click **Apply Filter Selection(s)** to filter the immunizations.

Or, click **Close** to close the scrolling window and not apply the filters.

		Select All • Clear All • Close
☑ Adenovirus types 4 and 7	☑ IGIV	☑ rabies, intradermal injection
☑ adenovirus, type 4	☑ Influenza, high dose seasonal	☑ rabies, intramuscular injection
☑ adenovirus, type 7	☑ influenza, live, intranasal	☑ RIG
☑ anthrax	☑ influenza, live, intranasal, quadrivalent	☑ rotavirus, monovalent
☑ BCG	☑ Influenza, seasonal, injectable	☑ rotavirus, pentavalent
☑ botulinum antitoxin	☑ Influenza, seasonal, injectable, preservative free	☑ RSV-IGIV
☑ cholera	☑ influenza, seasonal, intradermal, preservative free	☑ RSV-MAb
		Apply Filter Selection(s)

Diagnostic Images

The Diagnostic Images section contains links to images uploaded to the Patient Portal by the provider (doctor's office). The date the image was uploaded is listed in the **Date** column and the category of the image is listed in the **Folder** column.

Click the **Date** column header or the **Folder** column header to sort the images by the column name. The images are sorted by the **Date** column by default, with the most recent image at the top of the list.
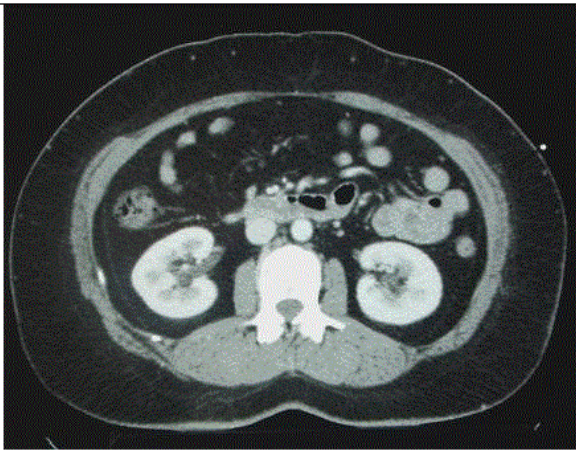
Click the **Document name** link to open and view the image in a pop-up window.

Diagnostic Images			
Date	**Folder**	**Document**	
7/28/2017	Radiology CT Scan	CTScan	
7/13/2017	Radiology	southwood-larry-029873830	
7/13/2017	Radiology	southwood-larry-029873829	

Provider (doctor) comments, if available, display in the **Report** section of the Diagnostic Image pop-up window. Click the **Close** button to close the pop-up window.

Diagnostic Image for Larry Southwood   Close

Document :Radiology CT Scan-CTScan

Report:
Scan shows no change. Will keep watching.

Close

Implantable Devices

The Implantable Devices section lists the implantable devices for a patient, if applicable. The UDI (unique device identifier) or Device ID number is listed in the **UDI or Device ID** column and the description of the implantable device is listed in the **Description** column.

Click the **UDI or Device ID** column header or the **Description** column header to sort the implantable devices by the column name. The implantable devices are sorted by the **UDI or Device ID** column by default.

Implantable Devices	
UDI or Device ID	**Description**
00857334004286	Vagus nerve electrical stimulation system lead

Procedures

The Procedures section lists the procedures a patient has received.   The date the procedure was performed is listed in the **Date** column and the corresponding type of procedure is listed in the **Description** column.

Click the **Date** column header or the **Description** column header to sort the information by the column name. The information is sorted by the **Date** column by default, with the most recent procedure at the top of the list.

Procedures	
Date	**Description**
3/28/2013	Access Prep

Smoking Status

The Smoking Status section displays a patient's smoking status and frequency of tobacco use.

Smoking Status
Current every day smoker :Heavy tobacco smoker

Health Record Tab Buttons
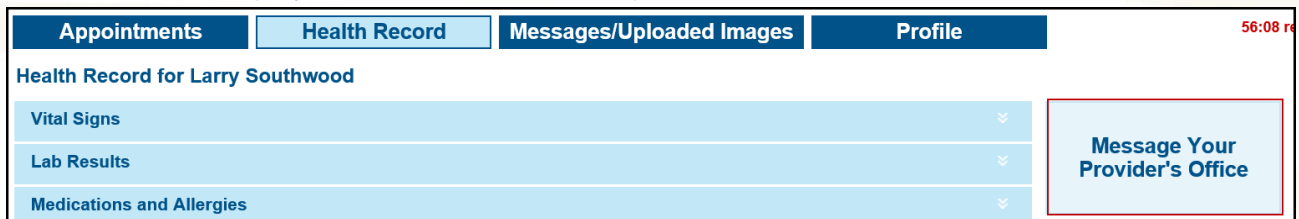
The Health Record tab also includes three action buttons: Message Your Provider's Office, Download Health Record, and Send Health Record.

Message Your Provider's Office

This action button allows the user to send a secure message to the provider (doctor's office). This button is located at the top right of all four tabs of the Patient Portal.

For more information on sending a secure message to the provider, refer to the Sending Messages section of this user guide.

Note: If the secure messaging system is not activated, the **Message Your Provider's Office** action button does not display and is not an available option.

Download Health Record

This action button allows a user to download and view a patient's health record from the provider (doctor's office) to a user's computer.

The user can download and view the following two options:
- Clinical Summary Document – document summarizing the patient's most recent visit
- Ambulatory Summary Document – document summarizing the patient's medical record

To download and view a health record:
1. Click the **Download Health Record** button.

2. Select one of the two options: **Download Latest Clinical Summary Document** or **Download Current Ambulatory Summary Document**, if available.

| Appointments | Health Record | Messages/Uploaded Images | Profile | 59:39 |

Download Health Record for Larry Southwood

Clinical Summary

Download Latest Clinical Summary Document

Ambulatory Summary

Download Current Ambulatory Summary Document

Message Your Provider's Office

Download Health Record

Send Health Record

3. Click the **arrow** icon [▼] next to the **Save** button and select **Save as** on the File Download pop-up window to save the zip file to a computer or portable device, such as a USB-Drive. The file name includes the patient's chart/medical record number followed by "_GeneratedCs.zip" or "_GeneratedAmbSum.zip".

Do you want to open or save hhc158_GeneratedCs.zip from myhealth.acumenehr.com?   Open   Save   [▼]

Save
Save as
Save and open

4. Select the appropriate location for the file on the Save As pop-up window (note where the file is being saved). Click the **Save** button.

Save As

This PC > Desktop   Search Desktop

Organize ▾   New folder

Pictures

This PC

Network

| Name | Date modified |
| Microsoft Office 365 ProPlus | 1/31/2017 2:52 PM |

File name: hhc158_GeneratedCs

Save as type: Compressed (zipped) Folder

Save   Cancel

Hide Folders

5. Click the **Open folder** button on the Download Completed pop-up window to view the zipped file.

The hhc158_GeneratedCs.zip download has completed.   Open   [▼]   Open folder   View downloads   ✕

6. Right-click on the name of the **GeneratedCs.zip** or **GeneratedAmbSum.zip** compressed zip file folder. Do not double-click on the compressed zip file folder.
7. Extract the file using a third-party extraction software, such as 7-Zip or WinZip.
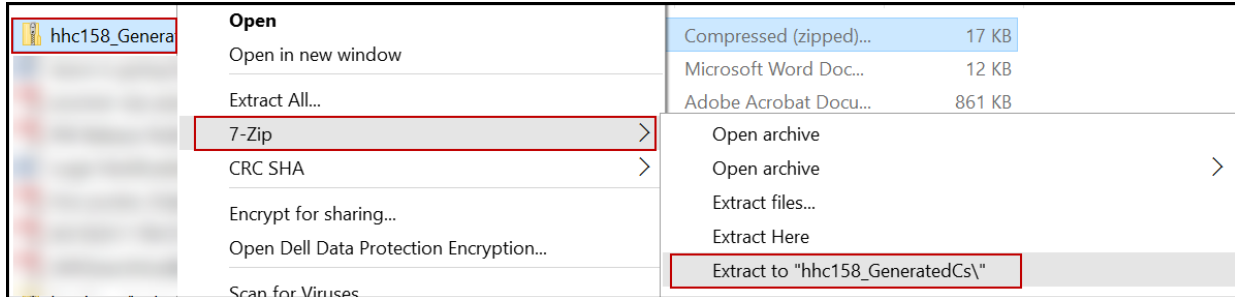
8. Double-click on the **GeneratedCs** or the **GeneratedAmbSum** unzipped file.

Name	Date modified	Type	Size
hhc158_GeneratedCs	7/30/2017 11:43 AM	Compressed (zipped)...	17 KB
hhc158_GeneratedCs	7/30/2017 11:58 AM	File folder	

9. Double-click the **GeneratedCs.xml** or **GeneratedAmbSum.xml** file.

Name	Date modified	Type	Size
APSCS	7/28/2017 11:41 AM	XSL Stylesheet	57 KB
hhc158_GeneratedCs.SHA256	7/30/2017 11:43 AM	SHA256 File	1 KB
hhc158_GeneratedCs	7/30/2017 11:43 AM	XML Document	95 KB

The Clinical Summary or Ambulatory Summary displays in Internet Explorer as shown below:

If the Clinical Summary or Ambulatory Summary does not display in Internet Explorer in readable form, or an error displays, follow the steps for one of the next two options:

Option 1:

1. Right-click on the **GeneratedCs.xml** or **GeneratedAmbSum.xml** file. Select **Open with** and **Internet Explorer**.

Name	Date modified	Type	Size
APSCS	7/28/2017 11:41 AM	XSL Stylesheet	57 KB
hhc158_GeneratedCs SHA256	7/30/2017 12:24 PM	SHA256 File	1 KB
hhc158_Generate		XML Document	95 KB

    Open
    Edit
    7-Zip   ›
    CRC SHA   ›

    Encrypt for sharing...
    Open Dell Data Protection Encryption...

    Scan for Viruses...
    Open with   ›   Internet Explorer
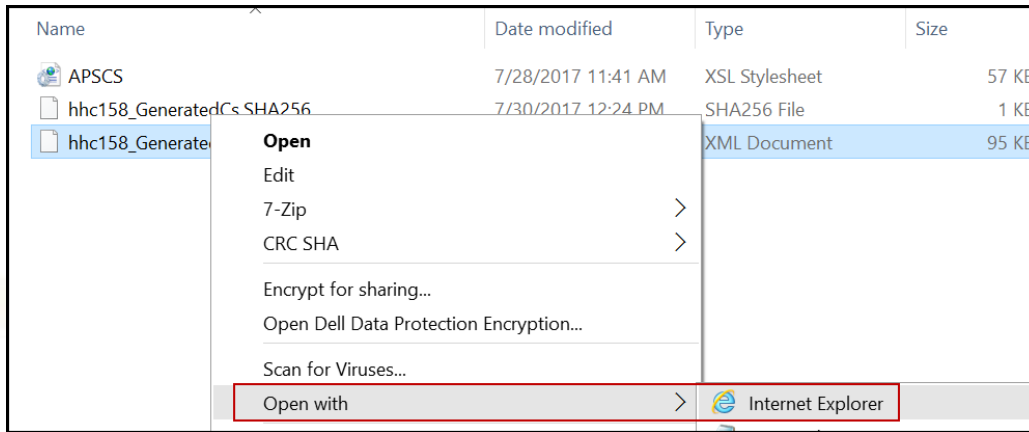
2. If Internet Explorer does not display on the **Open with** menu, then select **Choose another app**.

    Internet Explorer
    Microsoft Edge
    Notepad
    Office XML Handler
    WordPad
    Search the Store
    Choose another app
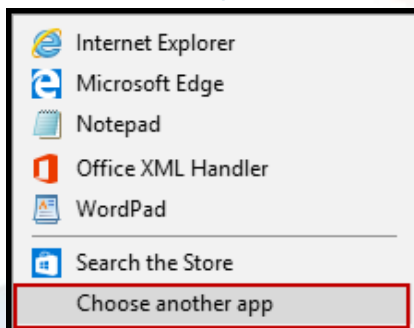
3. Select **Internet Explorer** under **Other options**, and then click the **OK** button.

How do you want to open this file?

Keep using this app

    Office XML Handler

Other options

    Internet Explorer

    Notepad

    Office XML Handler

☐ Always use this app to open .xml files

    OK
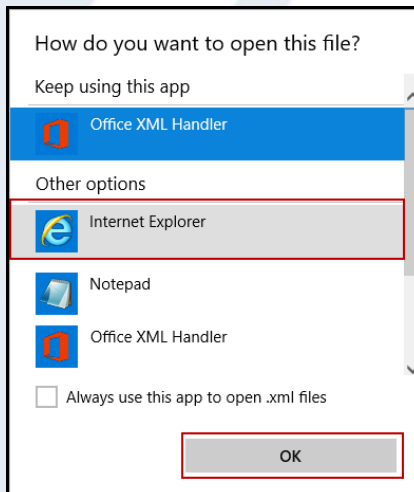
Option 2:

1. Double-click on the **APSCS**.**xsl** or **CDA_Original.xsl** Stylesheet.

Name	Date modified	Type	Size
APSCS	7/28/2017 11:41 AM	XSL Stylesheet	57 KB
hhc158_GeneratedCs.SHA256	7/30/2017 11:43 AM	SHA256 File	1 KB
hhc158_GeneratedCs	7/30/2017 11:43 AM	XML Document	95 KB

2. The Stylesheet opens in Internet Explorer. Close the Stylesheet page.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <xsl:stylesheet version="1.0" xmlns="http://www.w3.org/1999/xhtml" xmlns:xsl="http://www.w3.org/1999/XSL/Transform" xmlns:ms="urn:schemas-microsoft-
    com:xslt" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:hl7="urn:hl7-org:v3" xmlns:cda="urn:hl7-org:v3" xmlns:sdtc="urn:hl7-org:sdtc">
    <!-- <xsl:output method="html" indent="yes"/> -->
    <xsl:param name="colLabs" select="2" />
    <xsl:key name="vs_times" match="//hl7:section[hl7:templateId/@root='2.16.840.1.113883.10.20.22.2.4']/hl7:text/hl7:list/hl7:item" use="substring-before(., '-
    ')" />
    <xsl:key name="lab_dates" match="//hl7:section
    [hl7:templateId/@root='2.16.840.1.113883.10.20.22.2.3.1']/hl7:entry/hl7:organizer/hl7:component/hl7:observation/hl7:effectiveTime" use="@value" />
```

3. Double-click on the **GeneratedCs.xml** or **GeneratedAmbSum.xml** file to reopen the Clinical Summary or Ambulatory Summary. It displays in readable form.

Name	Date modified	Type	Size
APSCS	7/28/2017 11:41 AM	XSL Stylesheet	57 KB
hhc158_GeneratedCs.SHA256	7/30/2017 11:43 AM	SHA256 File	1 KB
hhc158_GeneratedCs	7/30/2017 11:43 AM	XML Document	95 KB

Note: The instructions above are for users with Windows 10 and Internet Explorer version 11. They may vary for users with other Operating Systems and Internet Explorer versions.

Send Health Record

This action button allows a user to send a patient's health record electronically to a different provider (doctor's office). The health record can be sent using Secure Email, also known as Direct Email, and can only be sent to providers (doctors' offices) that have a Secure Email account. Secure Emails are encrypted to protect the content from being read by anyone other than the intended recipient. The health record can also be sent using a public email address with a password protected attachment.

To send a health record:

1. Click the **Send Health Record** button.

Appointments	Health Record	Messages/Uploaded Images	Profile	59:37 r

Health Record for Larry Southwood

Vital Signs ⟱	**Message Your Provider's Office**
Lab Results ⟱	
Medications and Allergies ⟱	
Care Plan ⟱	**Download Health Record**
Problems ⟱	
Immunizations ⟱	
Diagnostic Images ⟱	**Send Health Record**
Implantable Devices ⟱	
Procedures ⟱	

2. The **Secure email** radio button is selected by default to send the health record via a Secure Email address or select the **Public email with a password protected attachment** radio button to send it via a public email address with a password protected attachment.

    a. A user can search for a provider's Secure Email address or type the full Secure Email address in the **To** field. Search results only include providers with a registered account with Security Exchange Solutions (SES), Acumen's secure email provider. Only one address can be entered in the **To** field.

        i. Type the Secure Email address (or at least the first two characters) in the **To** field. Click the **magnifying glass** icon to search for the Secure Email address. Click the **Select** link to add the address to the **To** field.

        ii. Or, type the full Secure Email address of the provider in the **To** field if the provider is not found in the search results.

Note: Health information can only be sent to a valid Secure Email address. If an error message displays indicating the message failed to send, contact the provider (doctor's office) for the correct Secure Email address.

Send Health Record

NOTE: This page automatically attaches a copy of your medical record to every message you send!

Select an email delivery option:

⦿ Secure email

◯ Public email with a password protected attachment

To: [_____] 🔍

b. Or, select the **Public email with a password protected attachment** radio button to send the health record via a public email address with a password protected attachment.

    i. Select either the **Default (low security)** or the **AES-256** radio button as the encryption option.

Note: Click the **here** link to view information on the encryption options in a pop-up window. Click the **Close** button to close the pop-up window.

Email attachment encryption options	Close
The Default option provides minimal data encryption, but enables the recipient to access the information using software that is already present on most computers. The AES-256 option provides stronger data encryption, but may require the recipient to download and install additional software in order to unzip and access the information.	

    ii. Type a **Password** in the text box and type the password again in the **Confirm Password** text box. The password must contain at least 8 characters.

    iii. Type the full public email address in the **To** field.

Send Health Record

NOTE: This page automatically attaches a copy of your medical record to every message you send!

Select an email delivery option:

○ Secure email

◉ Public email with a password protected attachment

    Encryption: ○ Default (low security) ○ AES-256   Click here for info on encryption options

    Password: [ ]   Confirm Password: [ ]

To: [ ]

3. The **Subject** line is automatically populated with the patient's name and cannot be changed.
4. Type a **Message** in the text area.
5. Click the **Send** button.

The Health Record (Ambulatory Summary) is attached automatically and cannot be removed. The attachment icon with label displays at the bottom of the page.

Subject: Ambulatory Summary - Patient: Larry Southwood

Message: [ ]

Send

hhc158_GeneratedAmbSum.xml

Confirmation that the message was successfully sent displays above the **To** field and a **Message Digest** displays below the message.

Secure Email Message:

Public Email with Password Protected Attachment Message:

Appointments Tab

The Appointments tab in the Patient Portal is organized into 3 sections: Office Contact Information, Care Team, and Appointments.

Office Contact Information

The Office Contact Information section displays the office location of the patient's upcoming appointment, the address and phone number, and the first and last name of the provider's (doctor's office) designated office contact, if available.

Care Team

The Care Team section displays the name and office location of the provider (doctor) that the patient sees at the doctor's office, if available.

Appointments

The Appointments section displays upcoming **Appointments** on the left and **Past Appointments** on the right, if available. Both sets of appointments include a **Date/Time** column and an **Attendee** (doctor/provider seen or scheduled to see) column.

Appointments Tab Button

The Appointments tab has one action button: Message Your Provider's Office.

Message Your Provider's Office

This action button allows the user to send a secure message to the provider (doctor's office). This button is located at the top right of all four tabs of the Patient Portal.

For more information on sending a secure message to the provider, refer to the Sending Messages section of this user guide.

Note: If the secure messaging system is not activated, the **Message Your Provider's Office** action button does not display and is not an available option.

Messages/Uploaded Images Tab

The Messages/Uploaded Images tab in the Patient Portal contains 2 sections: View Secure Messages and Images uploaded via Patient Portal. These sections allow a user to send a secure message to the provider (doctor's office), view and reply to secure messages from the provider (doctor's office), and view uploaded images sent to the provider (doctor's office).

Note: If the secure messaging system is not activated, the **Messages/Uploaded Images** tab does not display and is not an available option.

Sending Messages

To send a secure message to the provider (doctor's office):

1. Select one of the following options:
    a. Click the **Send New Message** link at the top right of the View Secure Messages section.
    b. Or, click the **Message Your Provider's Office** button.

Appointments	Health Record	Messages/Uploaded Images	Profile	59:20 r

Messages and Uploaded Images

View Secure Messages for Larry Southwood   ⌃

Send New Message

| **Message Your Provider's Office** |

Messages: Inbox ⌄   Messages will be removed 6 months after the date received

Date Received Topic   Subject

2. The **From** and **To** fields are automatically populated and cannot be changed.
3. Select a **Topic** in the drop-down menu: **Appointments**, **Billing**, **Prescriptions**, **Other**, or **Patient Portal Upload**. This is a required field.
4. Check the **This message contains personal health information** box if the message contains the patient's personal health information. This is optional.
5. Type a **Subject** in the text box. This is a required field.
6. Type a message in the text area. This is a required field.
7. Type or copy and paste a link/URL to a website in the **Link / URL (optional)** field to attach a website address to the message. This is an optional field.
8. Click the **Send** button to send the message. Or, click the **Cancel** button to not send the message.

Note: The **Download Health Record** and **Send Health Record** buttons also display on this page. Refer to the Download Health Record and Send Health Record sections of this user guide for more information on these two buttons.

Send a New Message to Your Provider's Office

Response time for messages will be 1-2 days. Medical Emergencies: Call your provider, proceed to the nearest emergency room or call 911.

| Message Your Provider's Office |
| Download Health Record |
| Send Health Record |

From: Larry Southwood
To: Office
Topic: *   ☐ This message contains personal health information for Larry Southwood

Appointments
Billing
Prescriptions
Other
Patient Portal Upload

Subject: *

Link / URL (optional):

* Required   Send   Cancel

Confirmation that the message was successfully sent displays at the top of the page.

View Secure Messages for Larry Southwood   ⌃

Message successfully sent

Send New Message

Messages: Inbox ⌄   Messages will be removed 6 months after the date received

The message displays in **Sent** messages.

Viewing Messages

Select **Inbox** (default) or **Sent** in the **Messages** drop-down menu. All new messages display in bold text. A notification is sent to a user's email address that the provider (doctor's office) has on file when a new secure message is available on the Patient Portal. The patient or authorized representative is not required to provide an email address.

Note: Messages are removed six months after the date a message was received.

The messages are sorted by the **Date Received** column by default, with the most recent message listed at the top. A **Topic** column and a **Subject** column also display.

Click the **View** button or click anywhere on the message row to open and view the message.

All threads of the message display, including the original message and all replies. A line separates each message in the thread.

Click the **Print Message** link to print the message. Click the **Hide** button to collapse and hide the message.

Replying to Messages

To reply to a secure message:

1. Click the **Reply** button. The **Reply** button can be clicked from a message that is not open (hidden), or from a message that is open.

2. The **From**, **To**, and **Topic** fields are automatically populated and cannot be changed.
3. Check the **This message contains personal health information** box if the message contains the patient's personal health information. This is optional.
4. The **Subject** is also automatically populated, but can be changed.
5. Type a message in the text area.
6. Type or copy and paste a link/URL to a website in the **Link / URL (optional)** field to attach a website address to the message. This is an optional field.
7. Click the **Send** button to send the reply. Or, click the **Cancel** button to not send the reply.

Reply to Message

Response time for messages will be 1-2 days. Medical Emergencies: Call your provider, proceed to the nearest emergency room or call 911.

From: Larry Southwood
To: Office
Topic: Appointments *   ☐ This message contains personal health information for Larry Southwood
Subject: Reschedule Appointment   *

I will take the 8:30 on Thursday, 11/7. Thank you.

Link / URL (optional):

* Required   [Send] [Cancel]

From: Office
To: Larry Southwood
Date: 7/26/2017

Confirmation that the message was successfully sent displays at the top of the page. In the Inbox, the **Reply** button is replaced with a **Replied** link followed by the date of the reply.

View Secure Messages for Larry Southwood

Message successfully sent

                                                              Send New Message
Messages: [Inbox ▾]   Messages will be removed 6 months after the date received

Date Received	Topic	Subject		
7/26/2017	Patient Portal Upload	Patient Portal Upload	[View]	[Reply]
7/26/2017	Appointments	Reschedule Appointment	[View]	Replied 7/31/2017

The reply also displays in **Sent** messages.

Note: When an authorized representative is the logged in user and sends a new message or a reply to the provider (doctor's office) on behalf of the patient, the authorized representative's name displays in parentheses next to the patient's name in the From field.

Note: The patient and all authorized representatives of the patient are able to view and reply to all the message threads exchanged between the provider (doctor's office) and the active portal accounts for that patient. Messages are not exchanged on an individual to individual basis as with email.

Uploading Images

To upload images via the Patient Portal to the provider (doctor's office):

1. Click the **Upload Image** button.

2. Select the appropriate type of information the image contains in the **Select Information Type** drop-down menu.

3. Click the **Browse** button to select and open the appropriate file.

Note: Supported file types include the following: PDF, JPG, JPEG, PNG, TIF, BMP, or GIF. The maximum file size is 5 MB.

4. Click the **Upload Image** button. Or, click **Remove** to remove the file.

Upload Image(s) for Larry Southwood

Send Personal Health Information to your Provider's Office

Maximum file size for any file is 5MB. Specific image types may have lower limits. Large files exceeding Document Imaging limitations will need to be resubmitted at a lower resolution.

Supported image types are pdf, jpg, jpeg, png, tif, bmp, gif

Diet Log ⌄

● Diet Log.pdf ✕ Remove

[Upload Image]

A confirmation message displays indicating the image has been uploaded successfully.

Select Information Type ⌄

[   ] [Browse]

[Upload Image] Image(s) uploaded successfully

Click the Messages/Uploaded Images tab to view the uploaded images listed in the Images uploaded via Patient Portal section, including the Image Name, Information Type, Date Uploaded, and Uploaded By (name of Patient Portal user who uploaded the image).

Appointments	Health Record	Messages/Uploaded Images	Profile

Messages and Uploaded Images

View Secure Messages for Larry Southwood ⌄

Images uploaded via Patient Portal ⌃

Image Name	Information Type	Date Uploaded	Uploaded By	
Diet_Log.pdf	Image Uploaded - Diet Log	11/29/2016	Larry Southwood	

Profile Tab

The Profile tab in the Patient Portal contains 1 section: Demographics. This section includes personal information about the patient, such as the patient's name, address, phone number, and date of birth.

Profile Tab Buttons

The Profile tab also has four action buttons: Message Your Provider's Office, Demographics (default), Account Management, and Activity Log.

Message Your Provider's Office

This action button allows the user to send a secure message to the provider (doctor's office). This button is located at the top right of all four tabs of the Patient Portal.

For more information on sending a secure message to the provider, refer to the Sending Messages section of this user guide.

Note: If the secure messaging system is not activated, the **Message Your Provider's Office** action button does not display and is not an available option.

Appointments	Health Record	Messages/Uploaded Images	Profile	59:07 r

Profile for Larry Southwood

Demographics

First Name:	Larry	Date of Birth:	8/12/1942
Middle Name:		Sex:	M
Last Name:	Southwood	Race:	White
Address 1:	123 Main Street	Ethnicity:	Not Hispanic or Latino
Address 2:	Apt. B	Prefered Language:	English
City, State Zip:	Somewhere TN 99999		
Home Phone:	615-555-1111		
Email:			

Message Your Provider's Office

Demographics

Account Management

Activity Log

Demographics

This action button allows the user to return to the Demographics section.

Demographics

First Name:	Larry	Date of Birth:	8/12/1942
Middle Name:		Sex:	M
Last Name:	Southwood	Race:	White
Address 1:	123 Main Street	Ethnicity:	Not Hispanic or Latino
Address 2:	Apt. B	Prefered Language:	English
City, State Zip:	Somewhere TN 99999		
Home Phone:	615-555-1111		
Email:			

Message Your Provider's Office

Demographics

Account Management

Activity Log

Account Management

This action button allows a user to change his/her password to the Patient Portal at any time.

Refer to the Logging Into the Patient Portal section of this user guide for more information about changing the password.

Activity Log

This action button allows a user to view an Activity Log that tracks all the activity from the past 30 days that occurs when a user (patient or authorized representative) is logged in the Patient Portal. The Activity Log displays the **Date/Time** of the activity, the type of **Activity** that occurred and the **Username** and name of the logged in user.

Logging Out of the Patient Portal

Click the **Logout** link at the top right of the Patient Portal header to exit the Patient Portal.
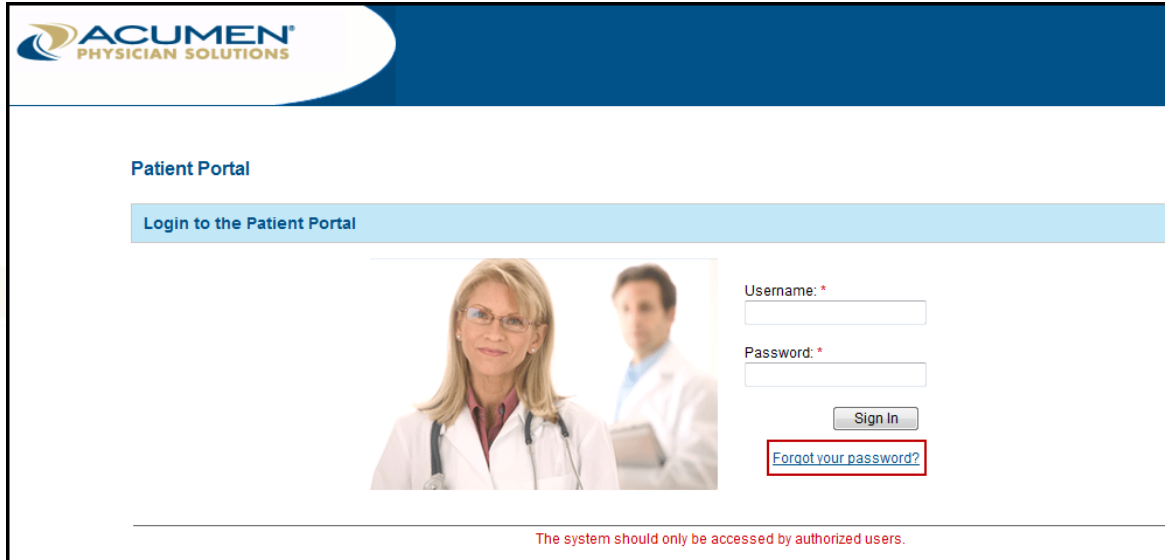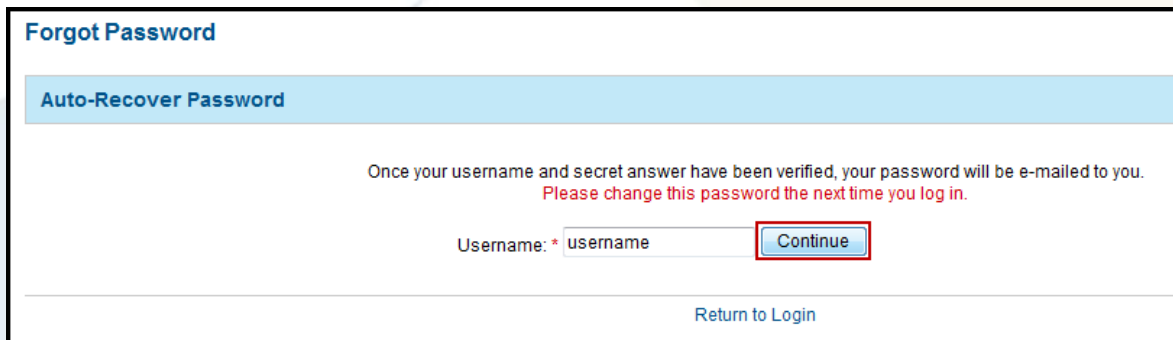
Requesting a New Password

A user can request a new password if the current password has been forgotten.

To request a new password:

1. Click the **Forgot your password?** link located on the login page of the Patient Portal.

2. Type the username, provided by the doctor's office, in the **Username** field.
3. Click the **Continue** button.

4. Type the **Answer** to the **Secret Question** selected during the initial log on.
5. Click the **Continue** button.

Forgot Password

Auto-Recover Password

Once your username and secret answer have been verified, your password will be e-mailed to you.
Please change this password the next time you log in.

Secret Question: *   Where were you born?

Answer: [   ]   Continue

Return to Login

The user receives an email with a temporary password.   Click the **Return to Login** link to return to the login page of the Patient Portal.

Note: The email is delivered to the email address that the provider (doctor's office) has on file for the patient or authorized representative, if one has been provided.

Forgot Password

Auto-Recover Password

Once your username and secret answer have been verified, your password will be e-mailed to you.
Please change this password the next time you log in.

Your password request has been received and processed.

Return to Login

Additional Information

- Please contact the provider (doctor's office) for more information or assistance with the Patient Portal.

- To access a Patient Portal How-To video, click the following link or copy and paste the link into an Internet browser: http://www.screencast.com/t/TKzcax12ZL . The password is AcumenPatientPortal.