INTELICHART

Engagement to Outcomes

PatientPortal

InteliChart “How To”

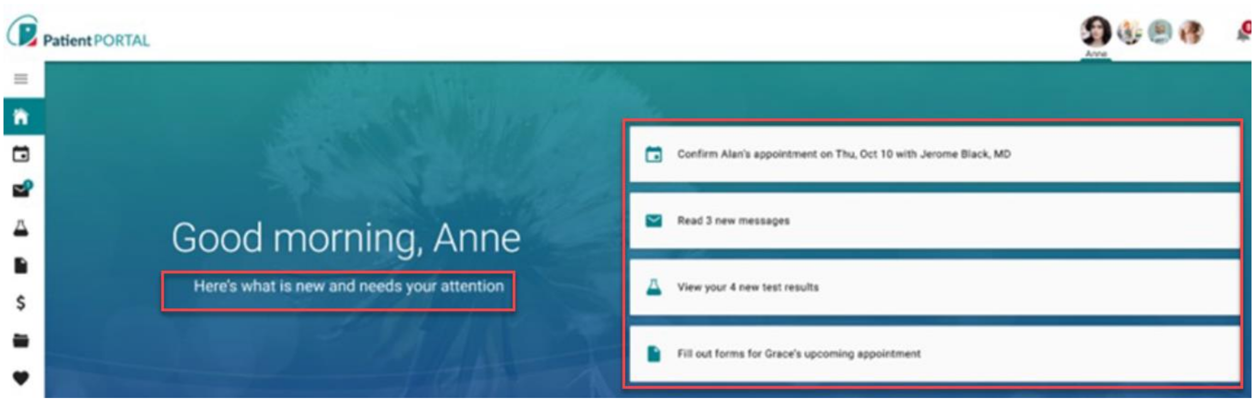
Patient Portal Navigation

Home Page

The home page focuses on appointments, messages, test results and forms. If a user has children or dependents, the home page rolls up appointments, messages, labs, and forms for review. Users can identify to whom the information applies, as the corresponding avatar is displayed in the bottom left of every card.

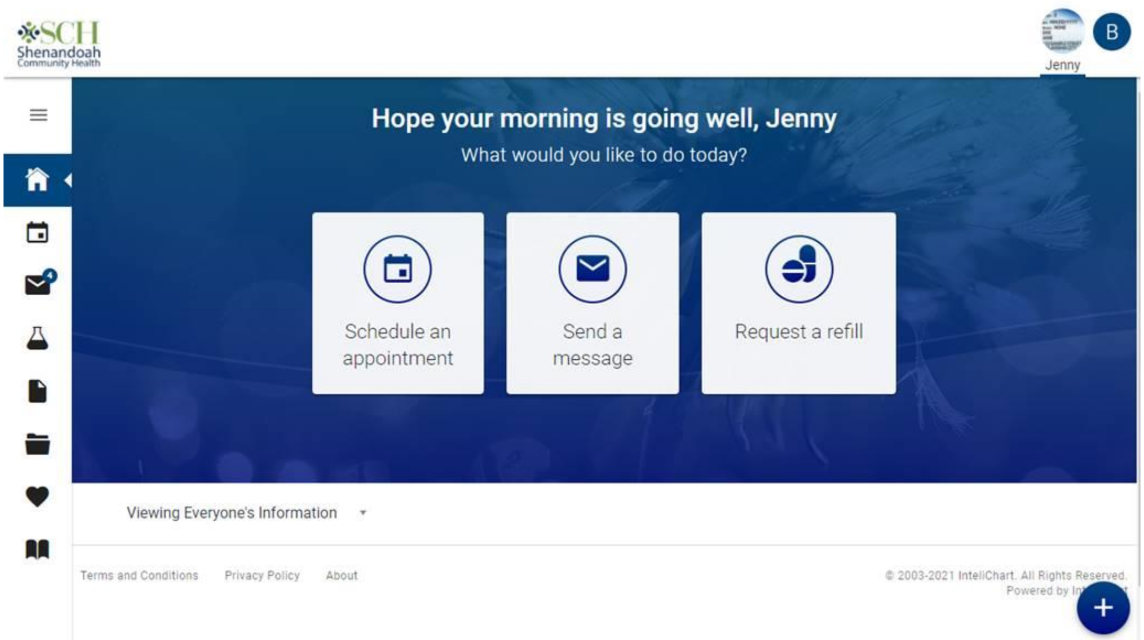
Action Tiles

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



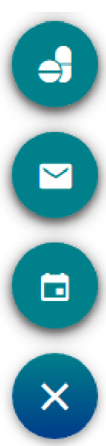
Floating Action Button

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



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

- Request a refill: Opens request a refill workflow
- Send a message: Opens compose new message workflow
- Make an appointment: Opens make an appointment workflow



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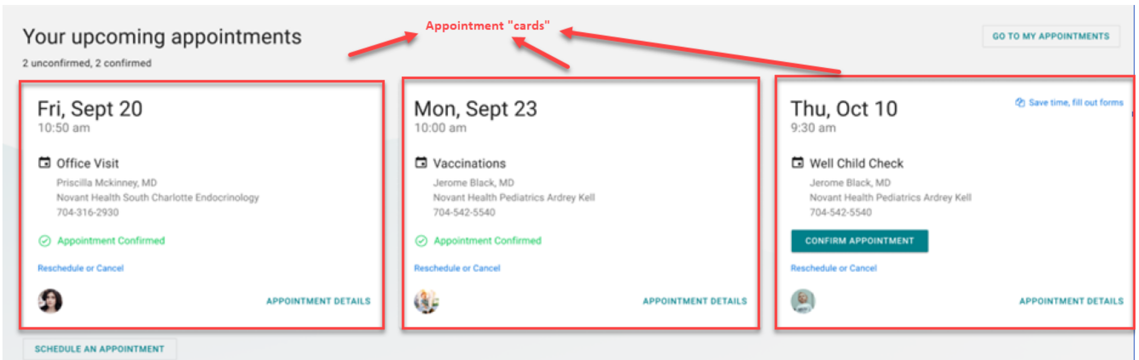
Appointments and Referrals

Upcoming Appointments

If a patient, their child(ren) or a dependent has an upcoming appointment, they will see them in the **Your upcoming appointments** section. If a patient, their child(ren) or dependent have no scheduled appointments, then the section for **Your upcoming appointments** is not displayed on the screen. Each appointment has a "card" and will display the appointment details.

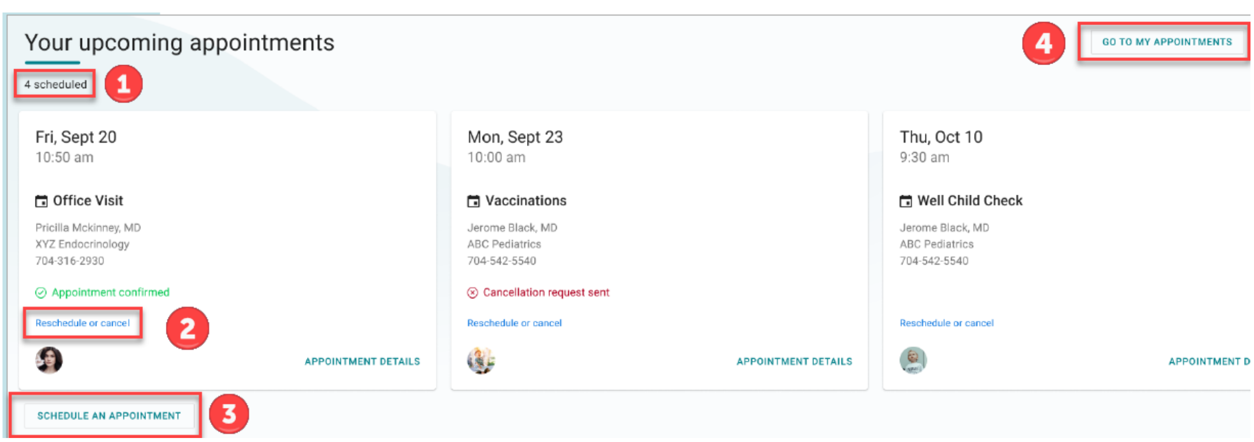


There may be more cards than can be seen on the screen. Here's how to view them:

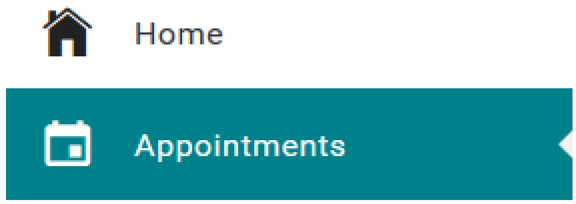
- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.

The user can do the following under the **Your upcoming appointments** section:

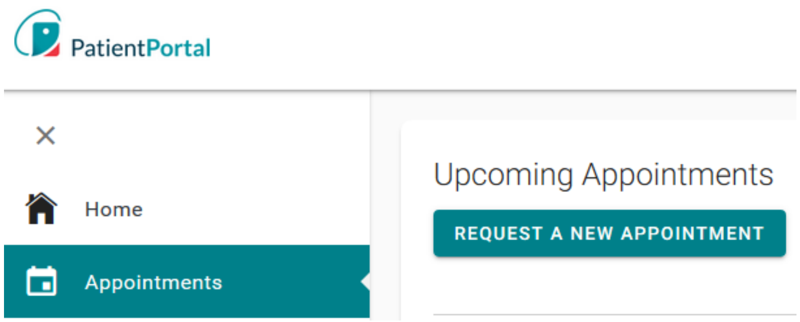
1. Identify the total scheduled appointments
2. Select the **GO TO MY APPOINTMENTS** to see all appointments
3. Schedule an appointment by selecting **SCHEDULE AN APPOINTMENT**



Appointment Request



The **REQUEST A NEW APPOINTMENT** link on the appointment page will start the appointment request.



This will prompt a series of questions to complete the appointment request.

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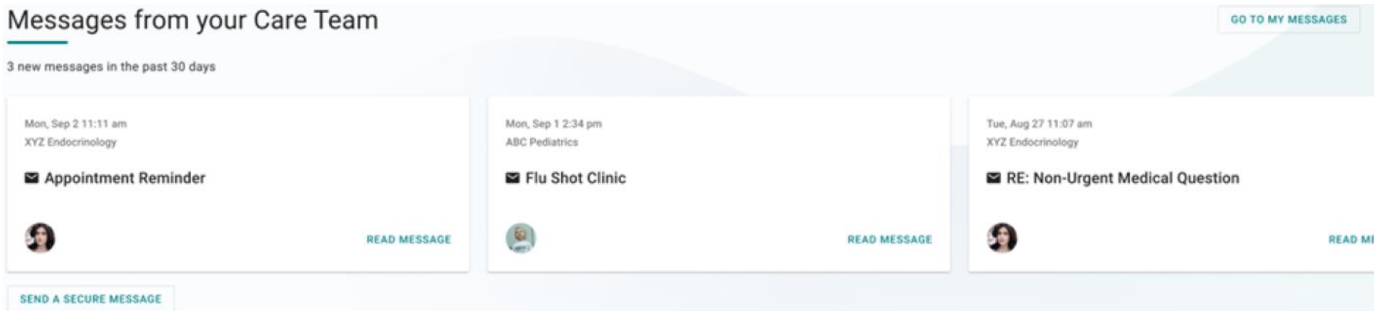
Messages

Viewing New Messages

If a patient, their child(ren), or dependent(s) has a message, the “Messages from your Care Team" section appears on the home page. When there are no messages, the "Messages from your Care Team" is not displayed on the screen.



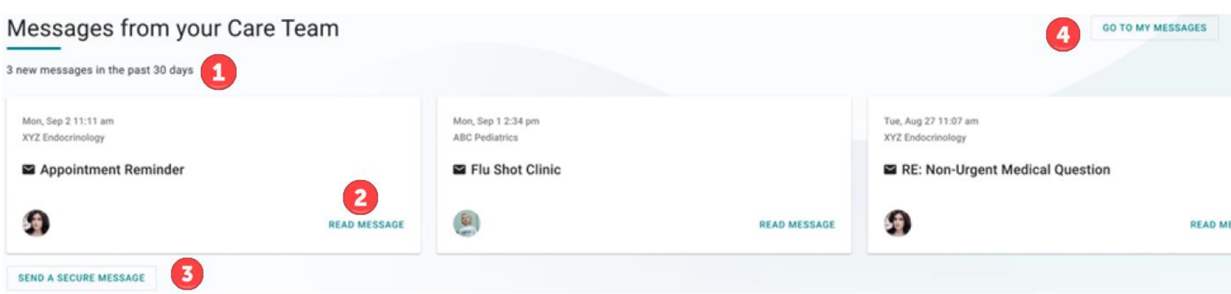
There may be more cards than can be seen on the screen. Here’s how to view them:

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

Note: *A message card that has been read disappears from the homepage when the user navigates away from the page.*

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

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



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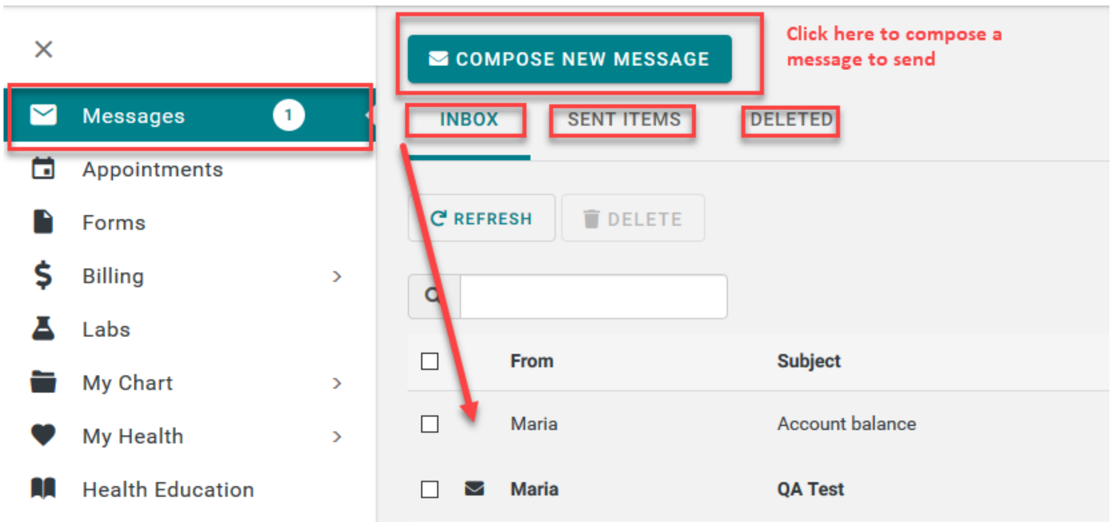
Compose New Message

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



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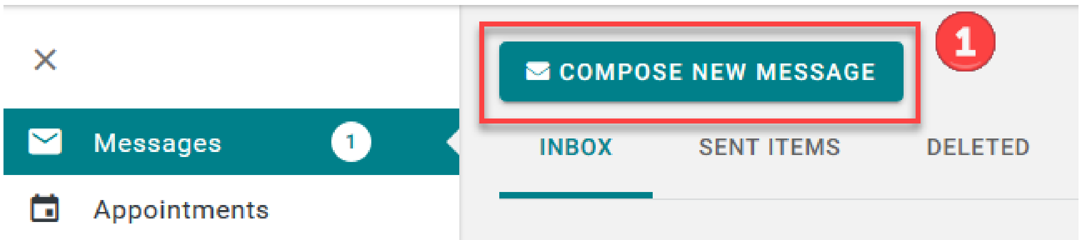
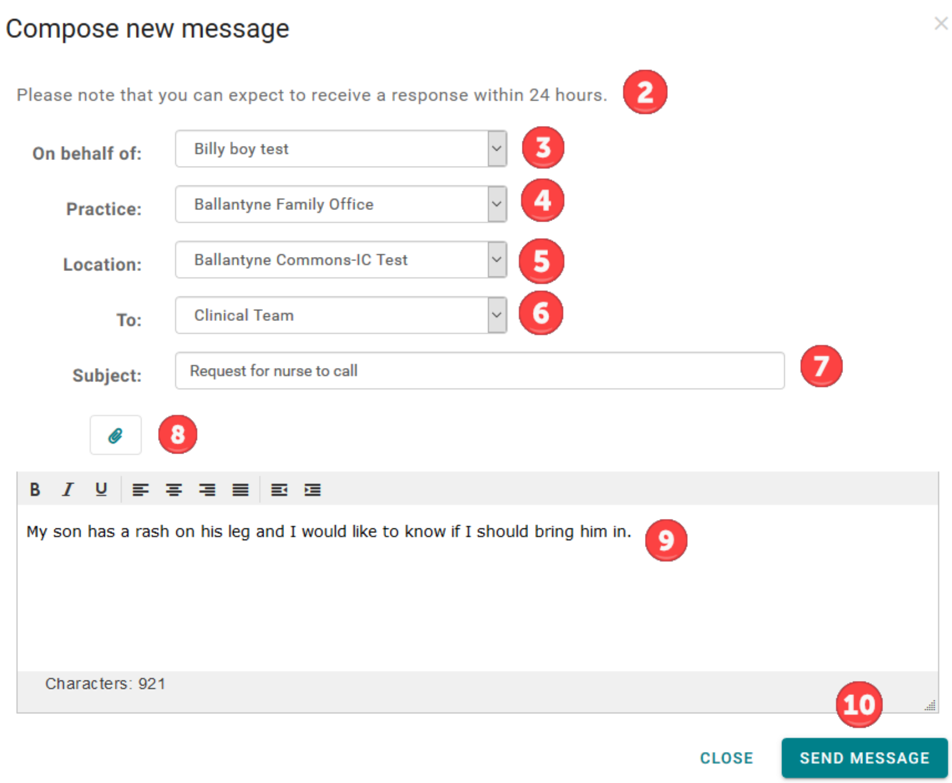
COMPOSE NEW MESSAGE gives the patient the ability to send a message to the practice that is in reference to a topic other than an appointment request or medication refill.

1. Click COMPOSE NEW MESSAGE



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



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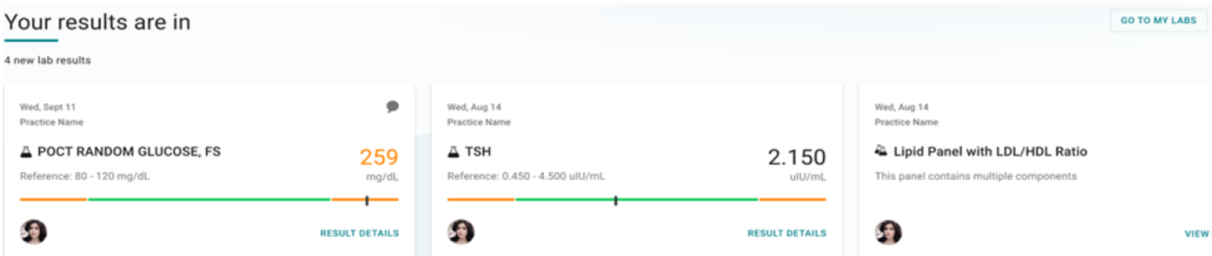
Labs

If a patient, their child(ren), or dependent(s) has a lab result, the **Your results are in** section appears on the home page. When there are no messages, the " Your results are in" is not displayed on the screen.



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

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

Note: *Lab cards are considered viewed and removed from the home page when the user's session ends, or they log out.*

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

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

More on reading your lab results:

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

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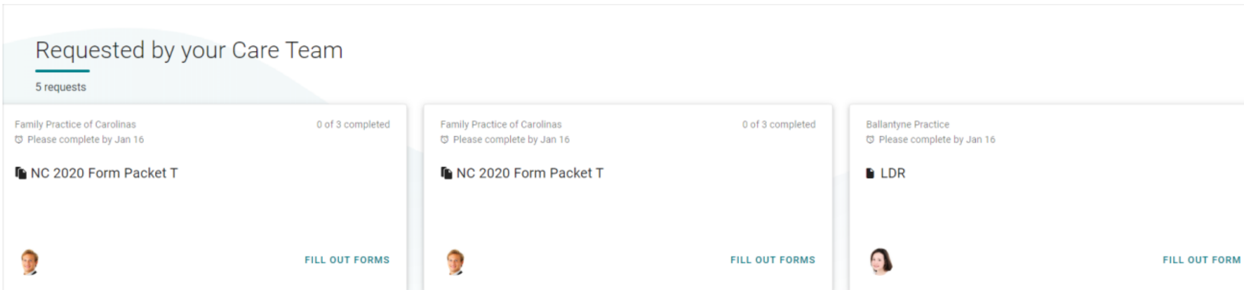
Forms

<u>Forms-Requested by your Care Team</u>

If a patient, their child(ren), or dependent(s) has a pending form to complete, the **Requested by your Care Team** section appears on the home page. When no forms need to be completed, the "Requested by your provider" is not displayed on the screen.

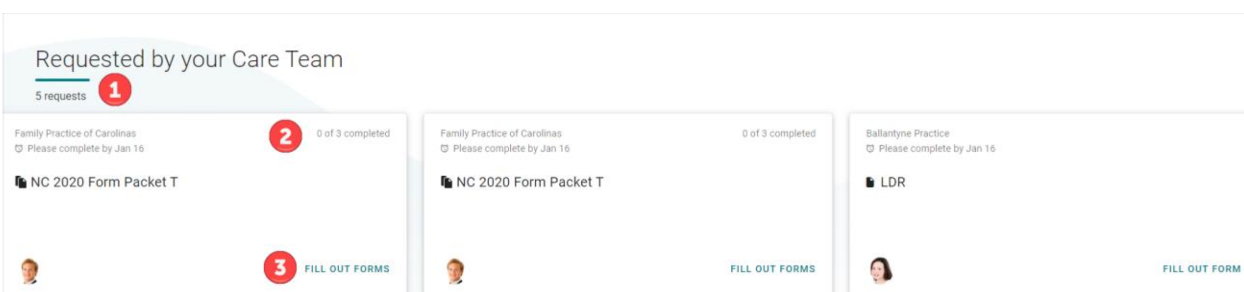


There may be more cards than can be seen on the screen. Here's how to view them:

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

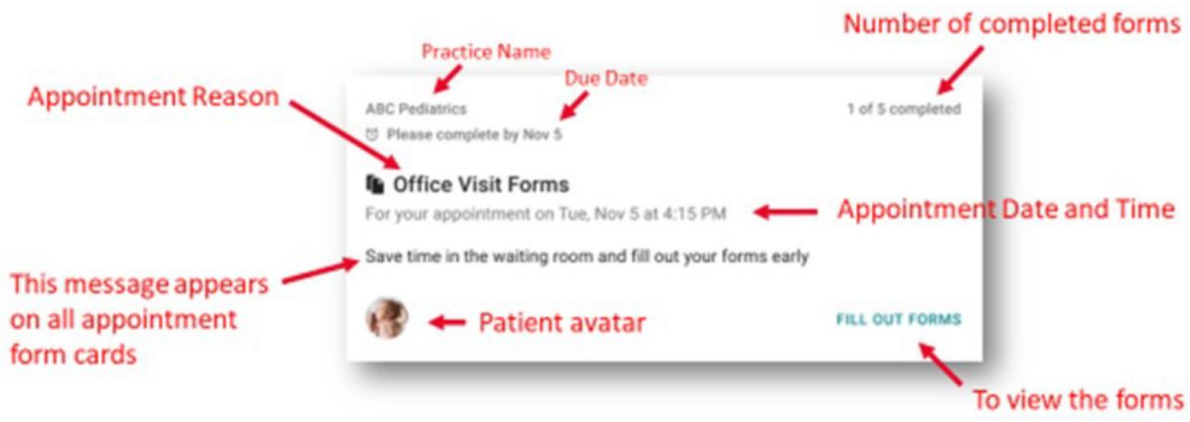
The patient can do the following under the **Requested by your Care Team** section:

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



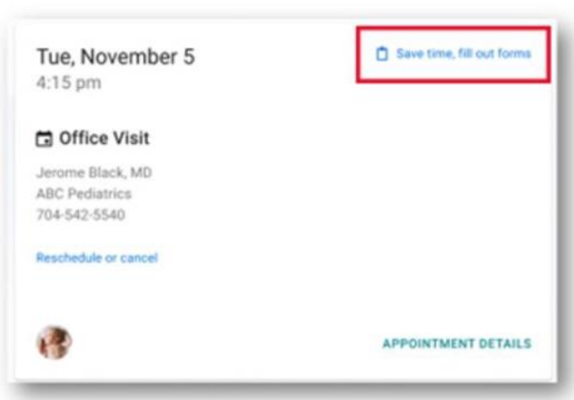
Appointment Form Card

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

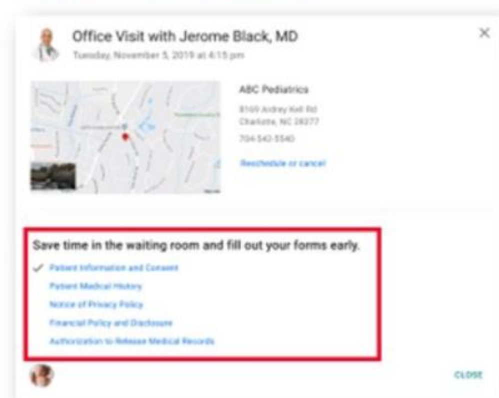


Other ways to access appointment forms:

On appointment card



On appointment details card

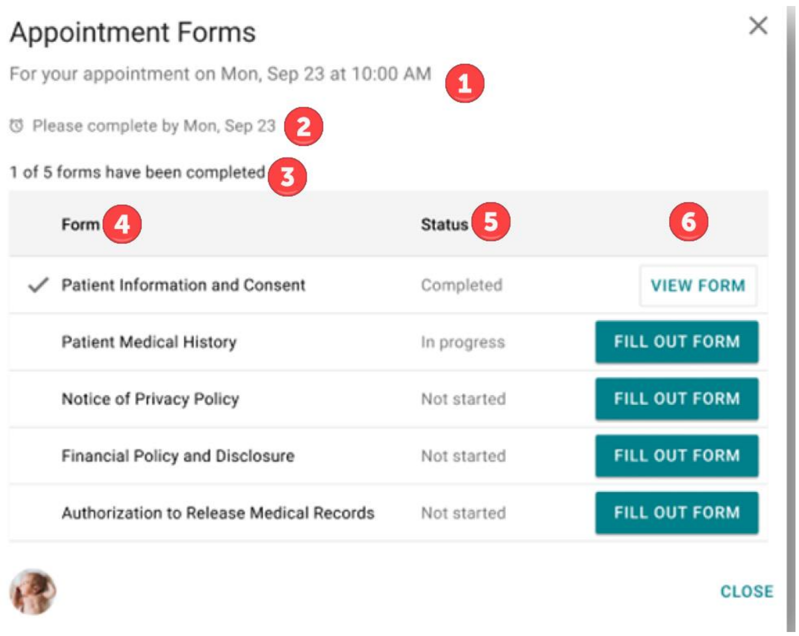


Fill Out Forms

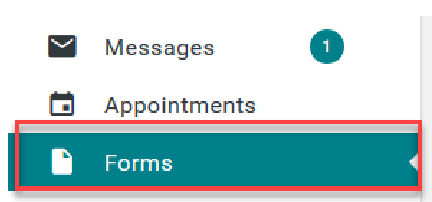
When the patient selects **FILL OUT FORMS,** they will be directed to a screen to complete their forms.

The screen will provide the following details.

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



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

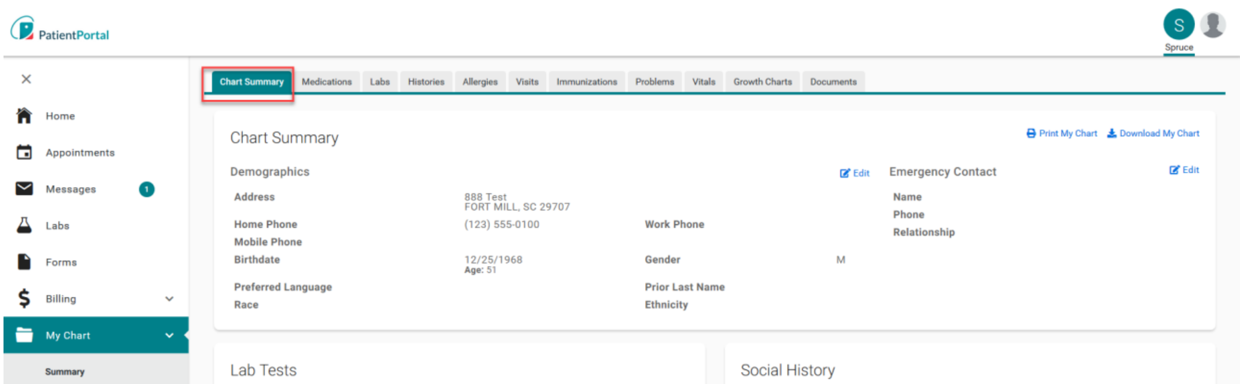


The patient will have access to view any pending, completed and available forms.

My Chart

My Chart-Chart Summary

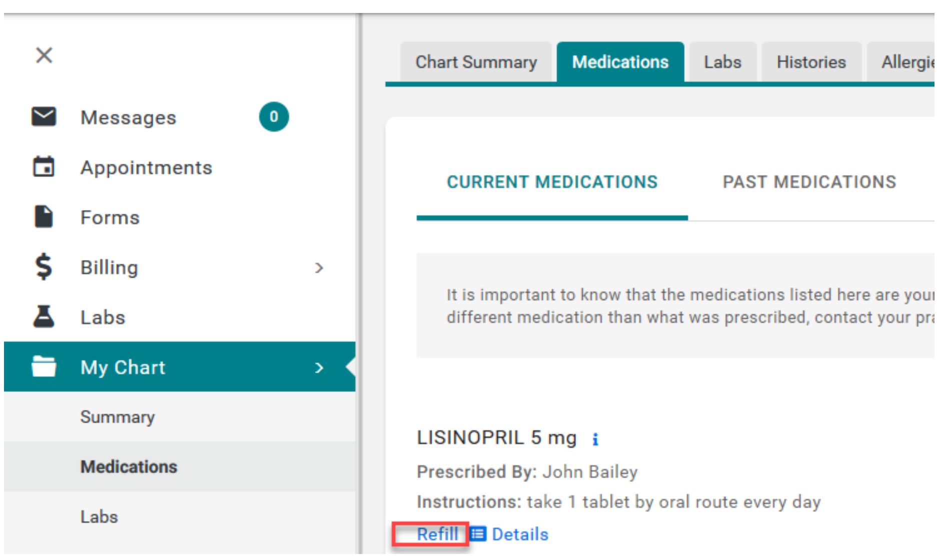
The **Chart Summary** page provides an overview of Demographics, Lab Tests, Histories, Allergies, Visits, Medications, Immunizations, Problems, Vitals and Allergies. The most recent 5 records will display on each widget. To see any health record in more detail, click on the widget title or click on respective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



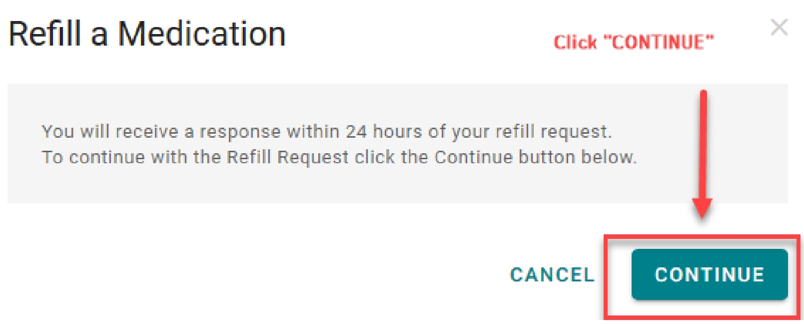
Request a Medication Refill

A request for a medication refill can be made only on medications prescribed by the patient's physician.

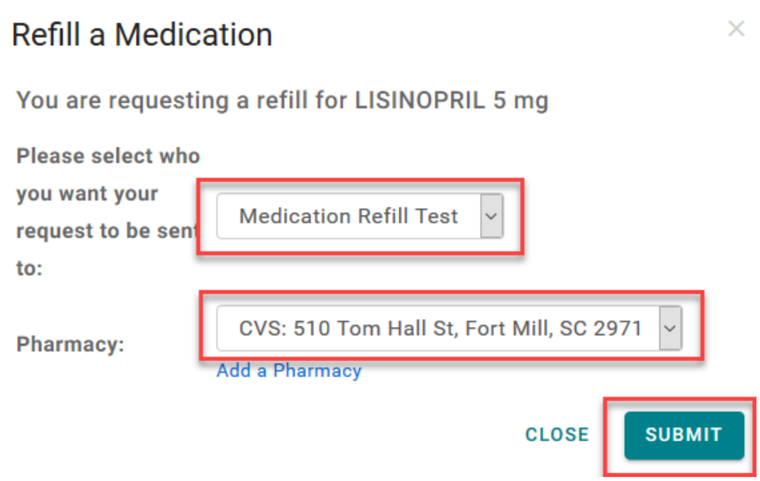
Click **Refill** under My Chart>Medications tab.



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



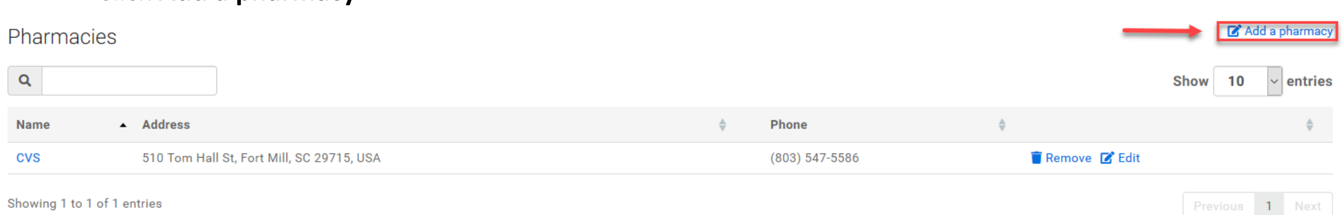
- Select who the request will be sent to (medication refill groups from practice/facility).
- Select a **Pharmacy** from the picklist and then click **SUBMIT**.



Add a Pharmacy

By adding a pharmacy, the patient can save pharmacies to use for medication refill request.

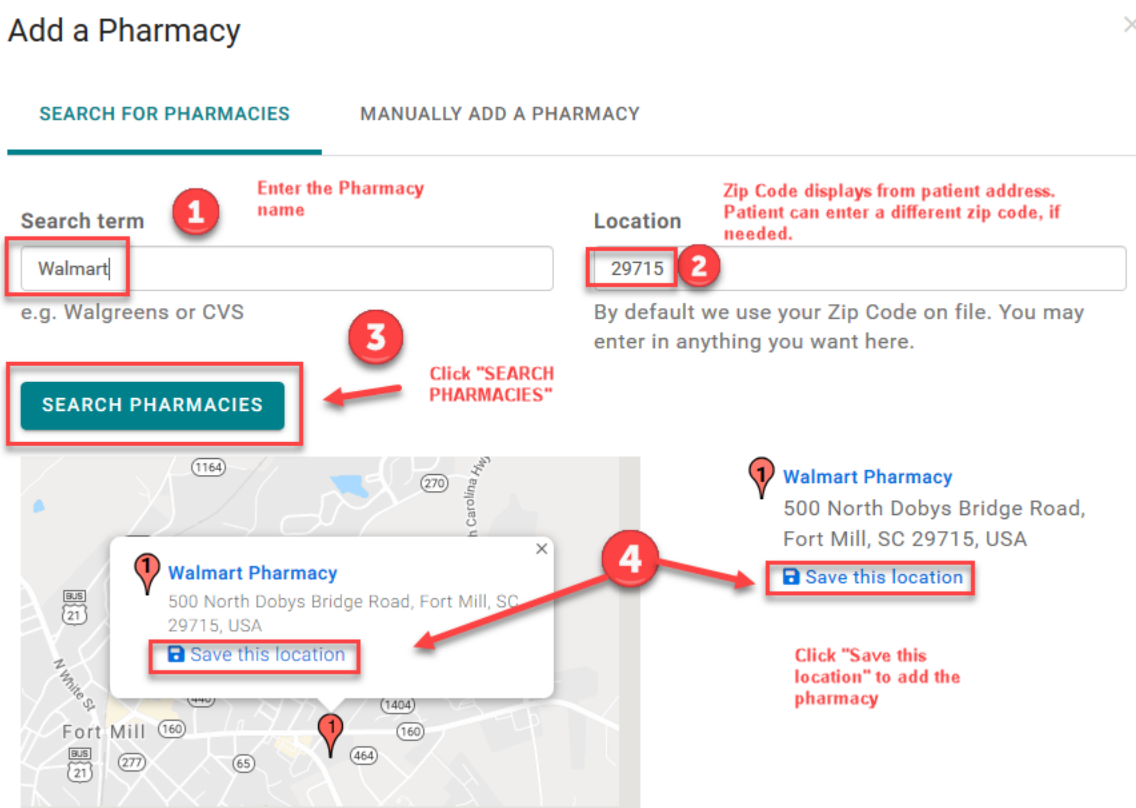
Click **Add a pharmacy**



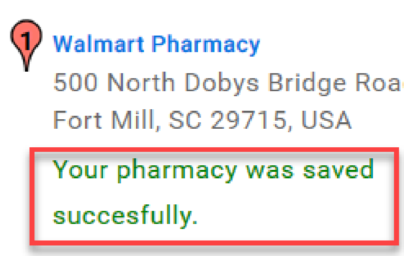
The patient will be presented with Add a Pharmacy pop-up. Pharmacies can be added by searching for a pharmacy or manually adding a pharmacy.

Add a Pharmacy:

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

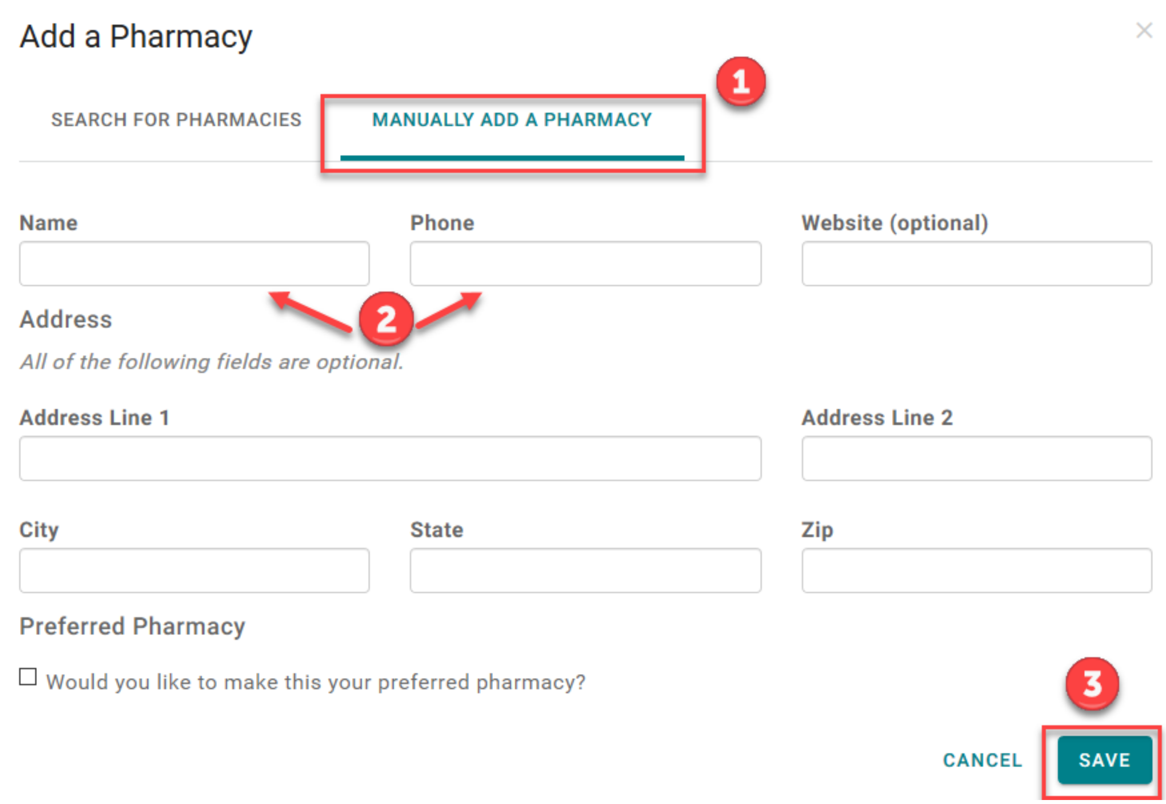


- Your pharmacy was saved successfully displays.

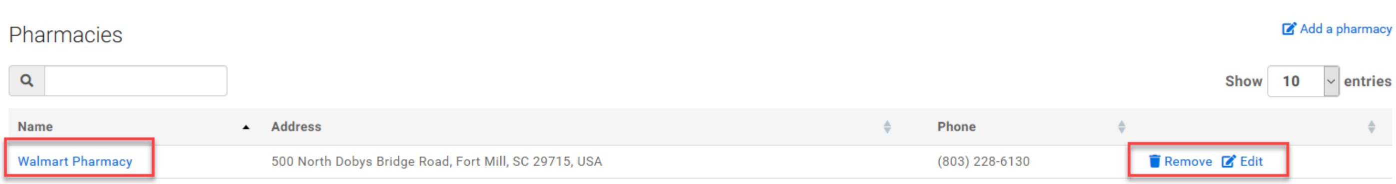


Manually Add a Pharmacy

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



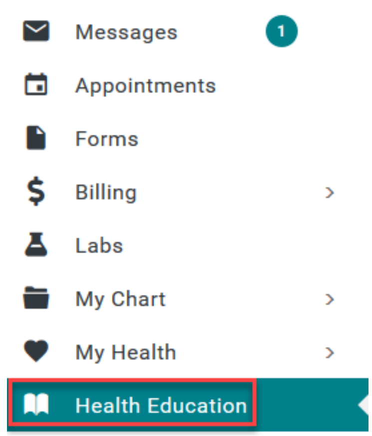
The Pharmacy is now listed under the Pharmacies. The patient can also search for a pharmacy in the practice's location and then save it to the pharmacy list. To make changes to the pharmacy information, click **Edit**. To remove pharmacy, click **Remove**.



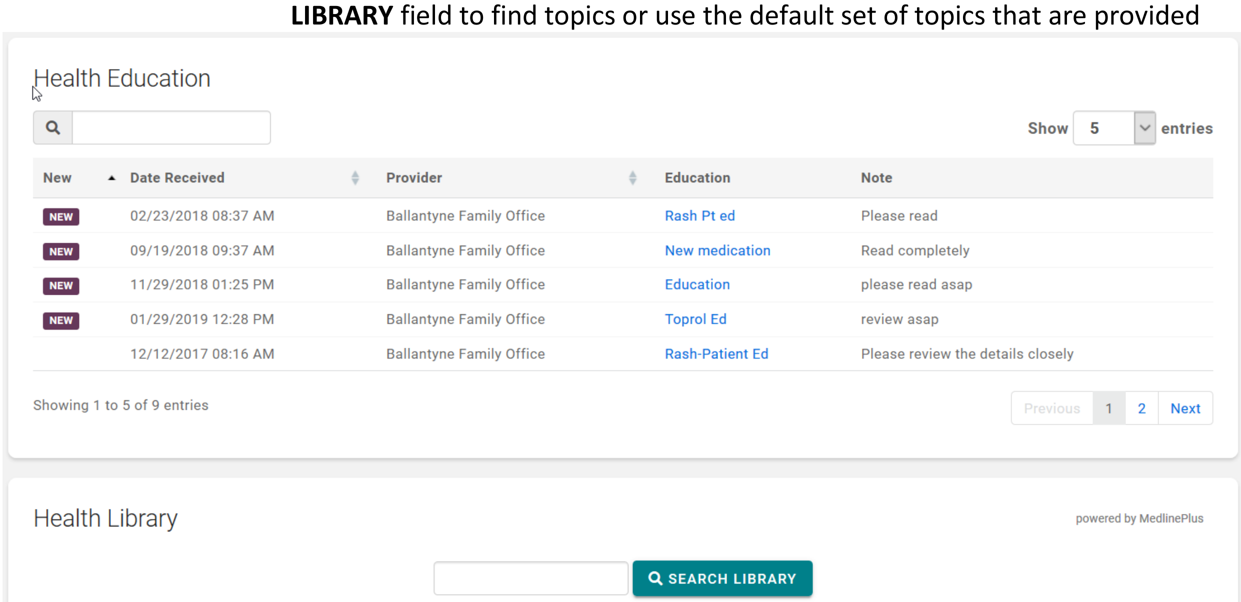
Health Education

Health Education will allow the patient to access Health Library utilizing the Medline Plus. Patients can search for a specific health topic. The patients can also choose a topic from the default set of topics that are available. Either option will allow the patient to view health topics.

- Click on the **Health Education** in the left-hand navigation

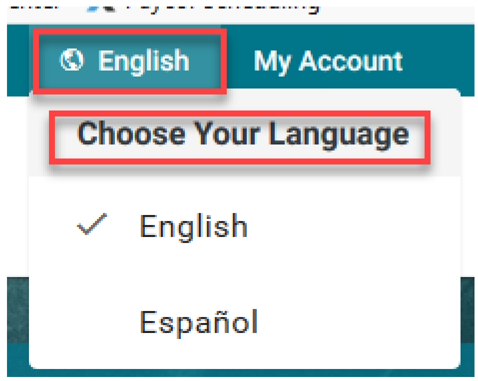


- Patients can access the practice specific **Health Education** or use the **SEARCH LIBRARY** field to find topics or use the default set of topics that are provided



Language Selector

The patient can select English or Spanish for their Patient Portal account by selecting the language drop-down on the top right of the Patient Portal home page.

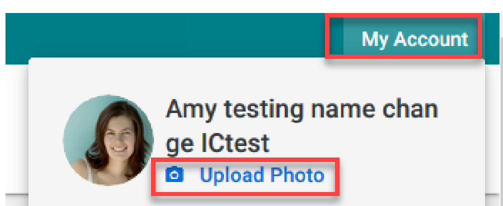


If the patient selects Spanish, a modal appears with a disclaimer that states the following in Spanish.

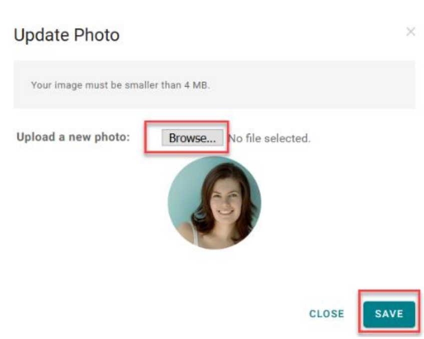
My Account

<u>Change Profile Picture</u>

- The patient can personalize their InteliChart® account by adding a picture to their profile. To change profile picture, do the following:
- Click **My Account** and select **Upload Photo**

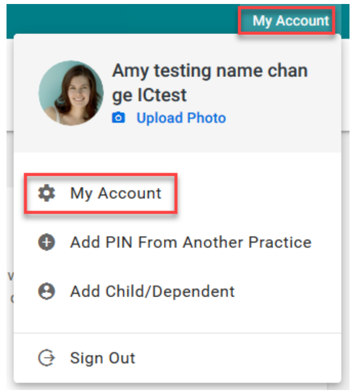


- Click **Browse** and choose the photo to upload as the profile picture; then click **SAVE**

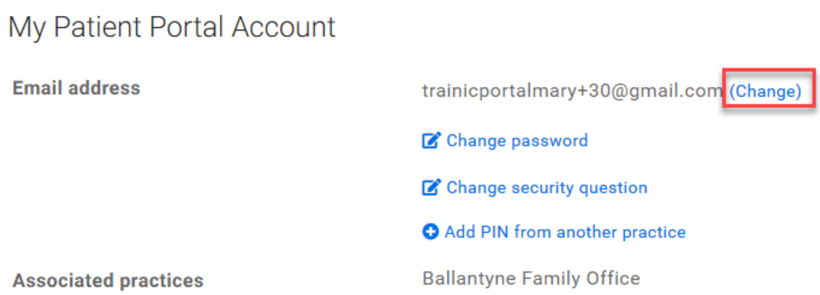


Change Password

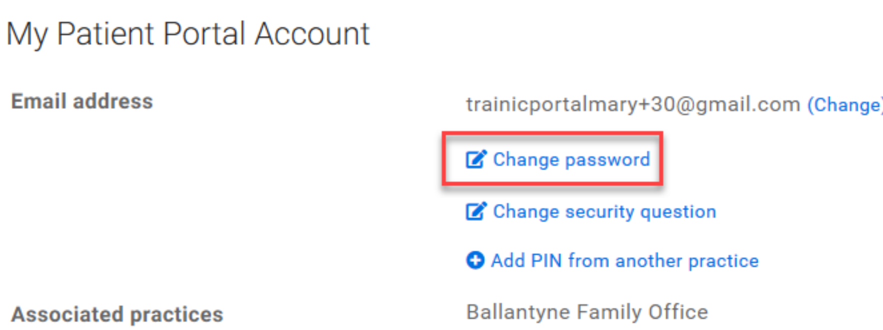
- Through the My Account page, the patient can change their email and/or Password and view and add any Associated Practices. The **My Account** page allows patients to adjust login settings and notifications.



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



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



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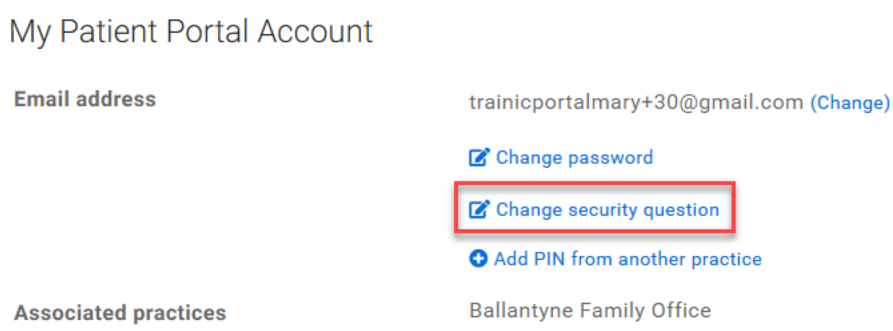
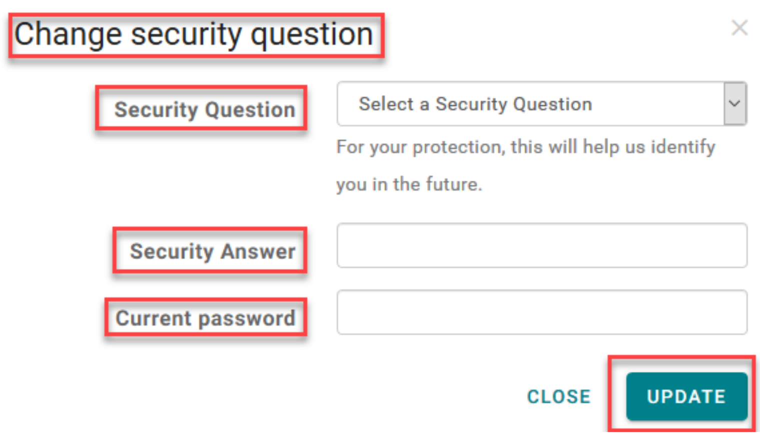
Change Security Question

When the patient selects Change Security Question, a modal will display **Change security question.**

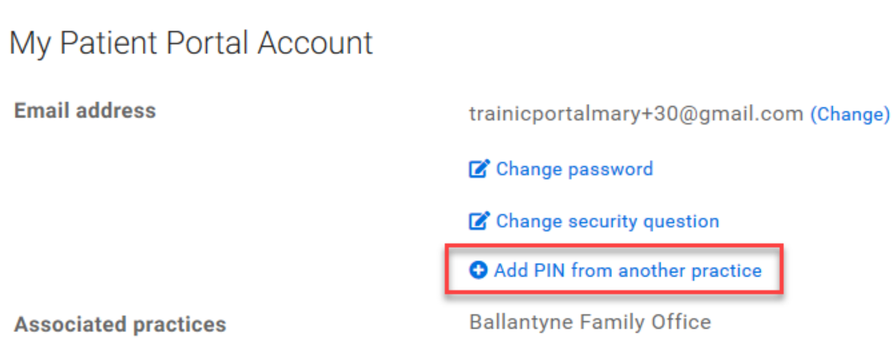


Patient will be prompted to select a new **Security Question, Security Answer** and **Current Password.**



Add PIN from Another Practice

To add an additional Associated Practice click **Add PIN from another practice**.



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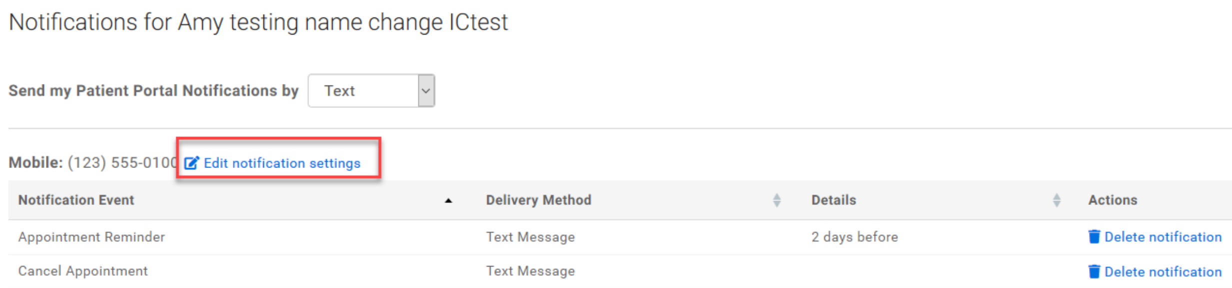
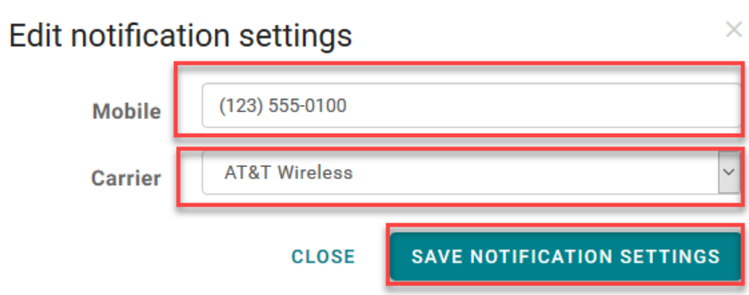
Notifications

On the My Account page the InteliChart® Patient Portal allows the patient to set up notifications and reminders.

- Scroll down the My Account page to the **Notifications** section
- Patients do not have to enter a separate **Notification** email address. The email used for their login will be used
- Patient may adjust notifications by clicking **Edit notification settings** and add their cellular number for text messages



- Edit notification settings window displays.
- **Mobile** number for text message Notifications can be changed
- To change text message Notifications a cell service **Carrier** will be selected
- Click **SAVE NOTIFICATION SETTINGS**



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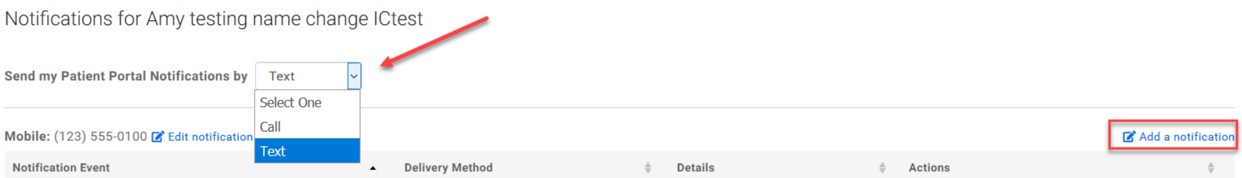
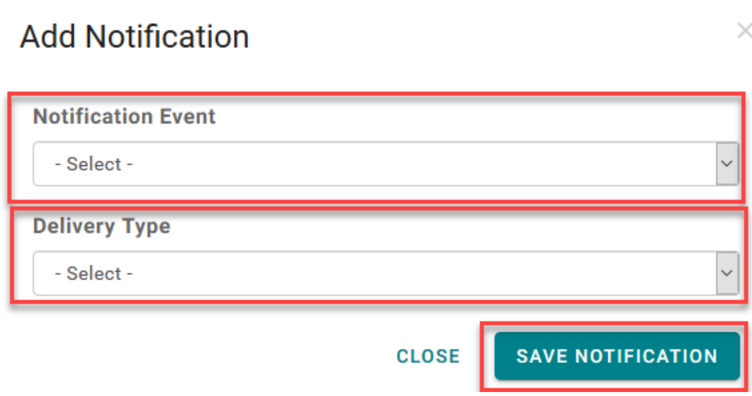
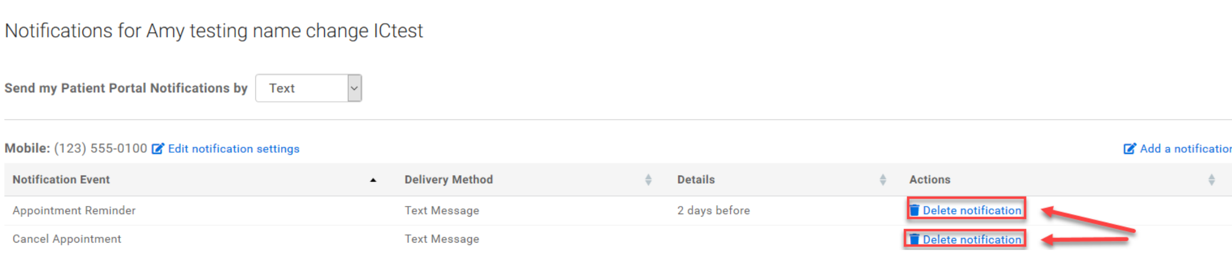
The Patient Portal patient will add Notifications that are sent by clicking the **Add a Notification** link. The patient can also provide a Preferred contact method by selecting the drop down for **Send my Patient Portal Notifications by**.



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

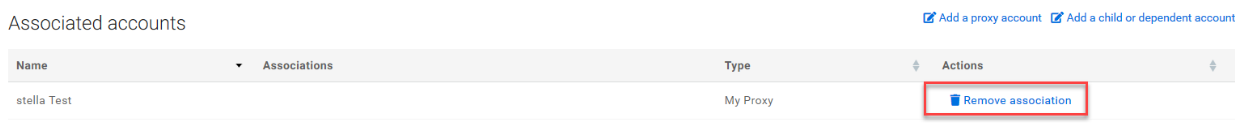


Notifications can be deleted by Patient Portal patients by clicking the **Delete notification** link.

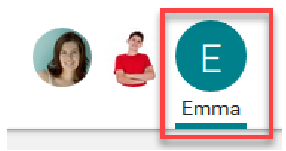


Proxy Associated Account

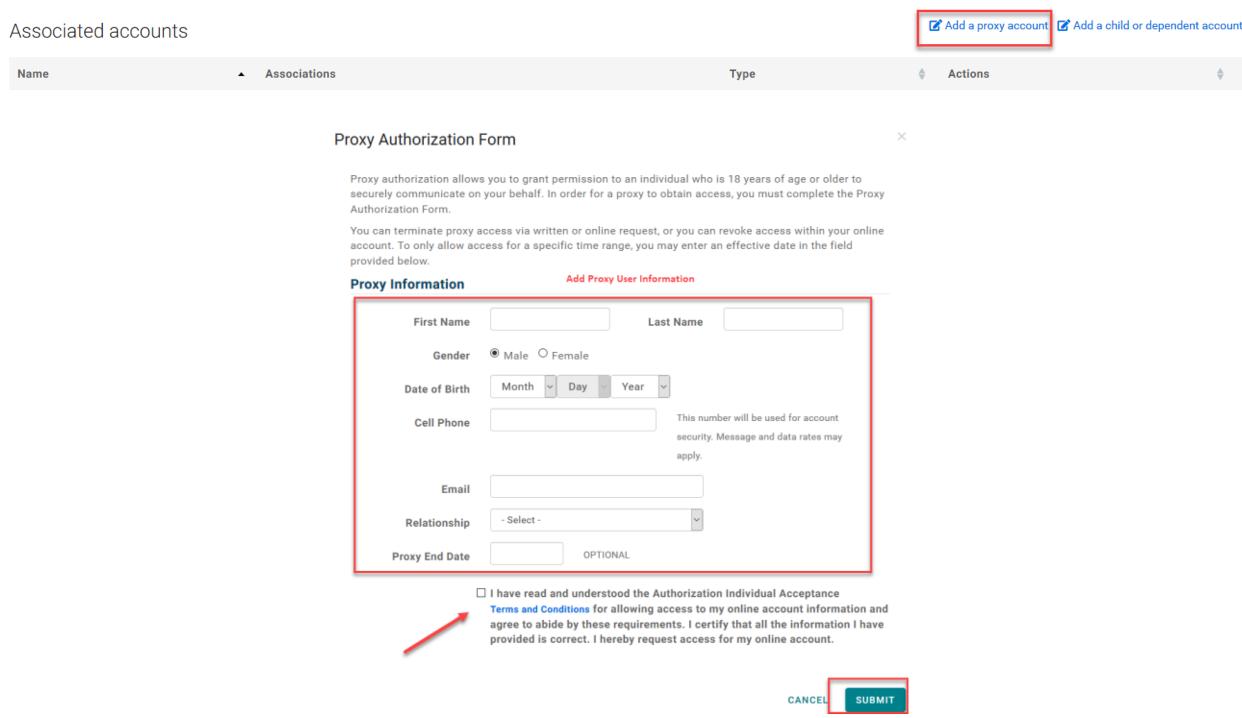
A Proxy User will display on the Patient Portal **My Account** page in the **Associated Accounts** section. The Patient Portal account user can remove a Proxy by clicking **Remove association**.



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



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



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

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

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