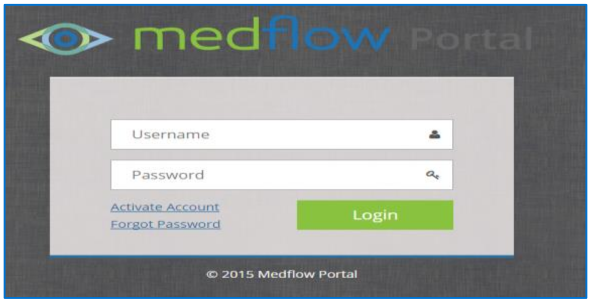
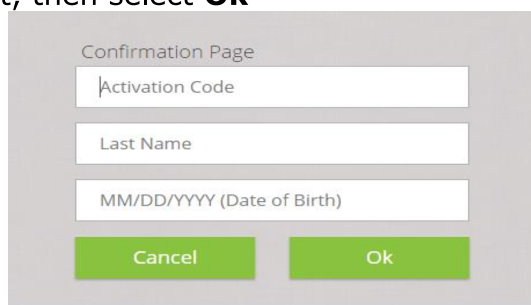
Section 4: Patient Initial Access to the Portal

The patient and/or patient's authorized representative will follow the instructions provided by the Clinic on accessing the patient portal for the first time.

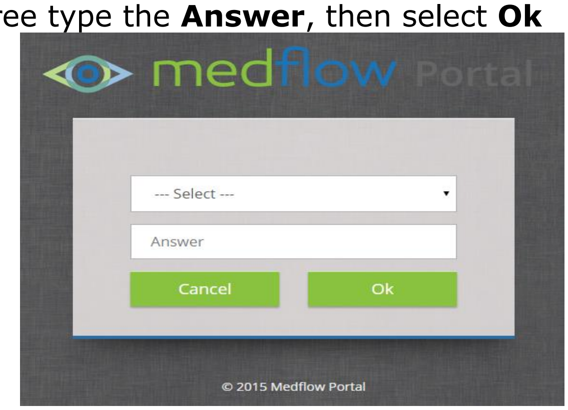
1. The patient or patient authorized representative will paste or type in the portal link (URL) into their internet browser
2. Select **Activate Account**



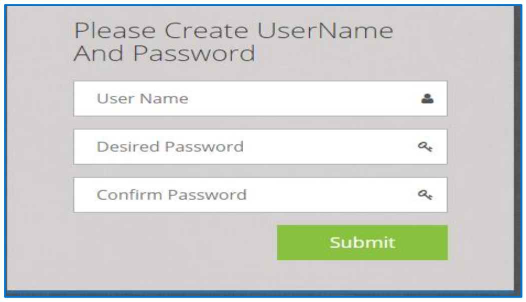
3. The patient or patient authorized representative will enter their **Activation Code**, **Last Name,** then **Date of Birth** by choosing from the calendar or free typing exactly as shown in the below screen shot, then select **Ok**



4. The patient or patient authorized representative will **---Select---** a security question from the drop down, then free type the **Answer**, then select **Ok**



5. The patient or patient authorized representative will then create a **User Name** and **Desired Password**, then **Confirm Password**, select the **Submit** button
   - **User Name:** Must be a minimum of five (5) characters long
   - **Password:** Must be a minimum of eight (8) characters long and alphanumeric



HIPAA Password Compliance

Reference https://www.pdxinc.com/hipaapw.asp

The HIPAA Privacy Regulations require that appropriate administrative, technical, and physical safeguards are in place to protect the privacy of protected health information. To meet this requirement, PDX has implemented a change to the password policy for all accounts used for accessing the PDX, Inc. web site.

The following represents the minimum requirements for your PDX password.

- **Password complexity:** Must not contain significant portions (three or more contiguous characters) of your account name or full name, must be at least eight (8) characters in length, must not use control characters and other non-printing characters, and must contain characters from at least three of the following four categories arranged in any order.
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphabetic characters: ~!@#$%^*&;?.+_
- **Maximum age:** All passwords must be changed at least every sixty (60) days.
- **History:** Set at six (6), meaning the password needs to be set six times before it can be reused.
- **Account Lockout Threshold**: After five (5) unsuccessful attempts to enter a password, the involved user-ID will be temporarily disabled for five (5) minutes after which the account will be automatically unlocked.

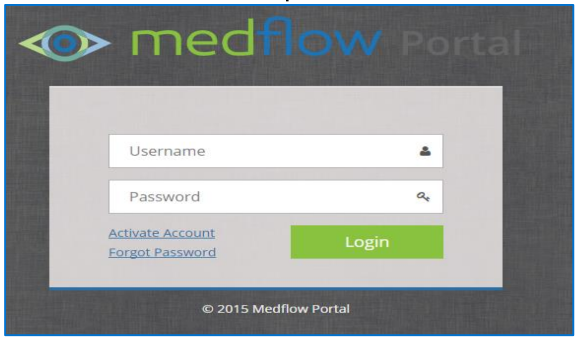
Guide to Creating a Secure Password

Passwords must be a minimum of eight (8) characters long and alphanumeric. Passwords should not be based on one's user name, actual name or any dictionary name; i.e., a good password should not contain standard words. The longer your password is the more secure it will be.

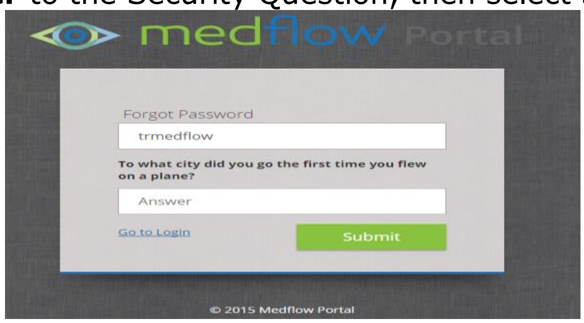
Section 5: Forgot Password

The patient and/or patient's authorized representative can retrieve their forgotten password.

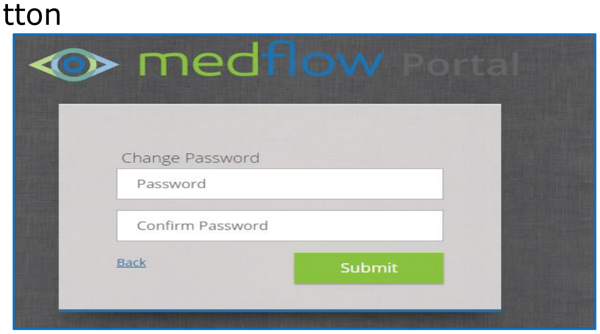
1. The patient and/or patient's authorized representative will select **Forgot Password**



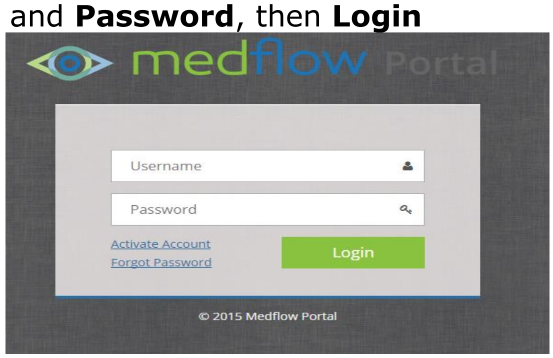
2. Free type the **User Name**
3. The Security Question will appear that you answered during your initial access
4. Free type your **Answer** to the Security Question, then select **Submit**



5. Free type a new **Password,** then **Confirm Password**
6. Select the **Submit** button

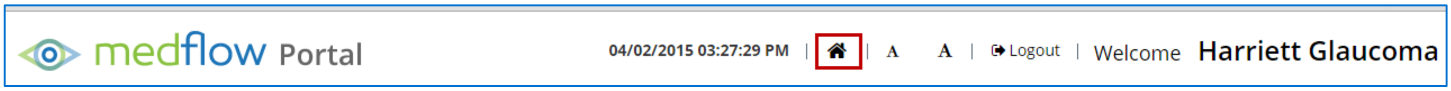


7. Enter your **User Name** and **Password**, then **Login**



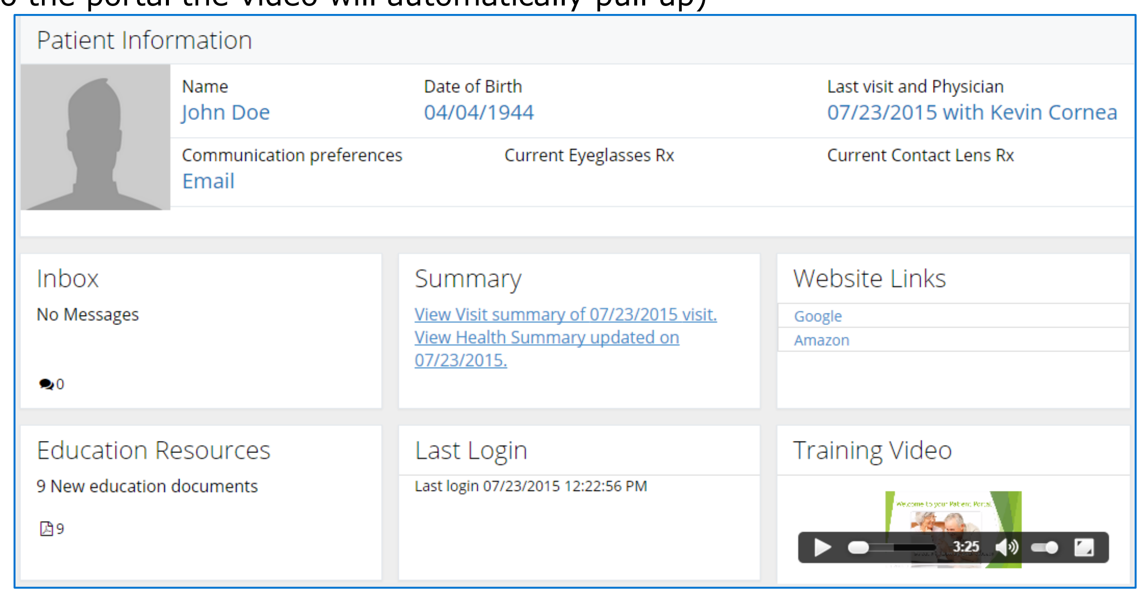
Section 6: Home Page

The Home Page is the default page that displays when the patient successfully logs into the portal. The Home Page provides a quick glance of new items added to the portal by displaying a number by each section. By selecting the icon within the sections will open that particular screen.
Select the Home icon at the top of the screen to be re-directed back to the Home Page.
Select the small **A** to make the font smaller and the large **A** to make the font larger.



Different sections of the Home Page:

- **Patient Information:** Information captured in the physician's office: Picture, Name, Date of Birth, Sex, Last visit and Physician, Communication preferences, Current Eyeglasses Rx, Current Contact Lens Rx and Phone (Currently the Eyeglasses and Contact Lens Rx do NOT display in the patient portal)
- **Inbox:** Secure messages received from the physician
- **Summary:** Visit Summaries (Temporally Disabled) and Health Summaries with the date the information was updated
- **Website Links:** EP's preference setting of friendly web site links: ex: practice web site, AAO eyeSmart web site, other web sites
- **Education Resources:** Education Resources provided by the physician (videos and documents)
- **Last Login:** Last time the patient or patient authorized representative logged into the portal
- **Training Video:** Tutorial for the patient on navigating the portal (first time upon logging onto the portal the video will automatically pull up)

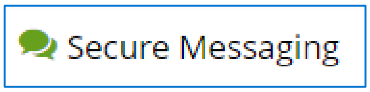


Section 7: Secure Messaging

Secure Messaging refers to the exchange of messages between the Patient Team (the patient and any authorized representatives) and the Health Care Team. Generally Secure Messaging may be thought of as essentially like e-mail, but without e-mail addresses and tailored to optimize health care workflow.

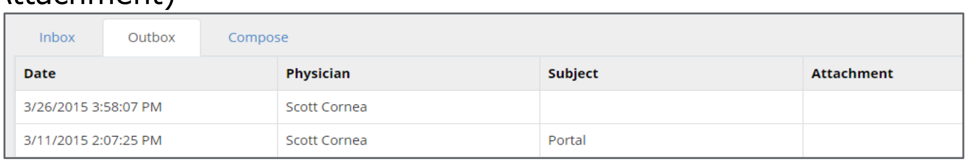
Note for Phase 1: All messages initiated from the clinic to the patient portal only go to the patient, not the authorized representative. So in the case of patients not using the portal, but has an authorized representative (such as children or elderly adults), the messages will not be seen.

1. Select the **Secure Messaging** tab

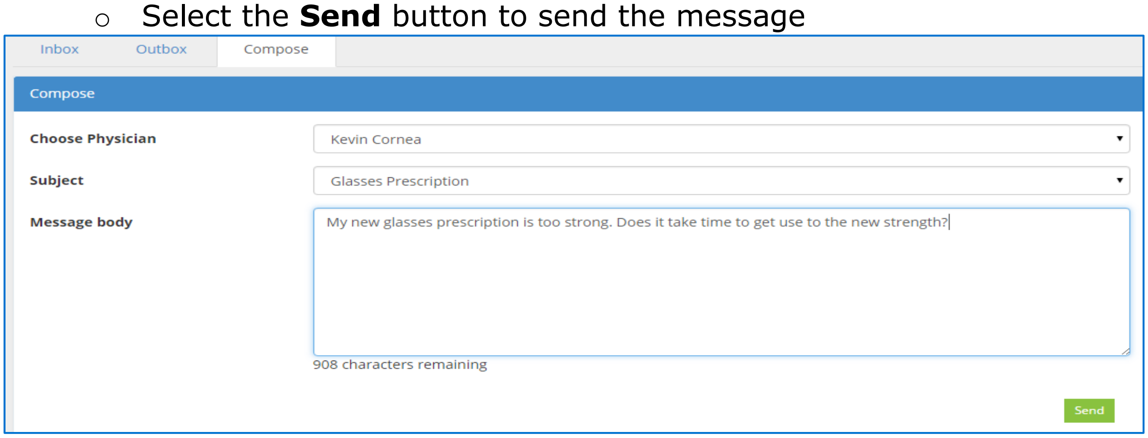


- **Inbox** is the default page which displays the latest messages the patient received from the physician (Date, Physician, Subject, Attachment)

- **Outbox** displays messages the patient has sent to the physician (Date, Physician, Subject, Attachment)



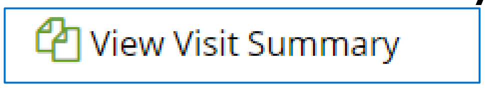
- **Compose** allows the patient to send a secure message to the physician
  - Select from the **Choose Physician** drop down
  - Select from the **Subject** drop down
  - Free type in the **Message body**
  - Select the **Send** button to send the message



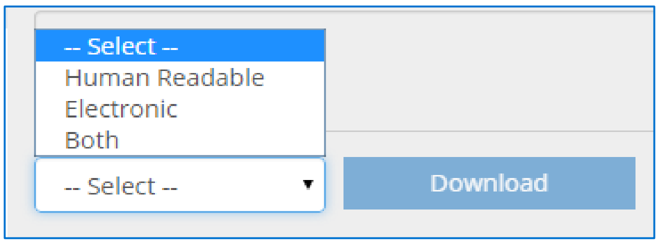
Section 8: View Visit Summaries

The Visit Summary provides the patient with details of the latest visit and chart information from the clinic (aka Clinical Summary / Ambulatory Summary). The patient can view, download and transmit their visit summary.

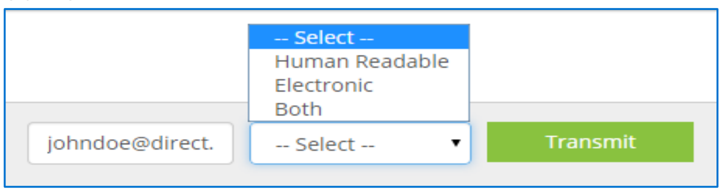
1. Select the **View Visit Summary** tab



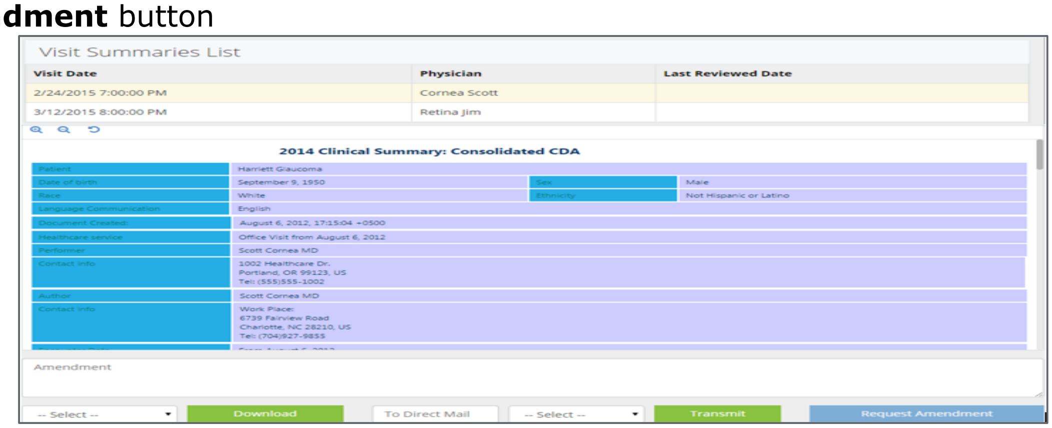
2. Select the **Visit Date** to open the visit summary
3. Select from the drop down: Human Readable, Electronic or Both, then select the **Download** button



4. Free type in the direct address in the **To Direct Mail** field to transmit the health summary select from the drop down: Human Readable, Electronic or Both, then select the **Transmit** button



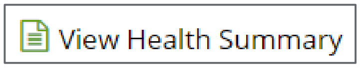
5. Free type in an amendment request in the **Amendment** field if you see something that needs to be added/changed from the visit summary, then select the **Request Amendment** button



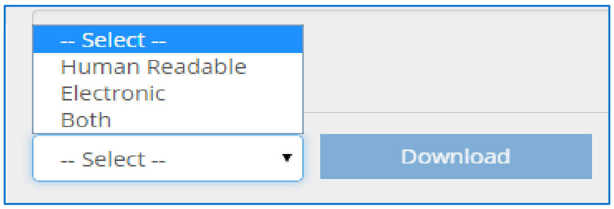
Section 9: View Health Summary

The Health Summary is a cumulative document which is updated anytime something has been added to the patient's chart (aka Patient Health Information). The patient can view, download and transmit their health summary.

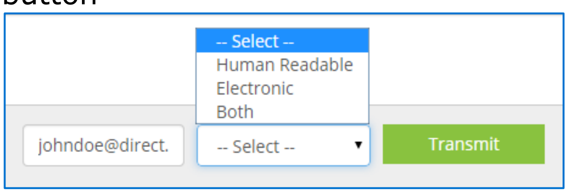
1. Select the **View Health Summary** tab



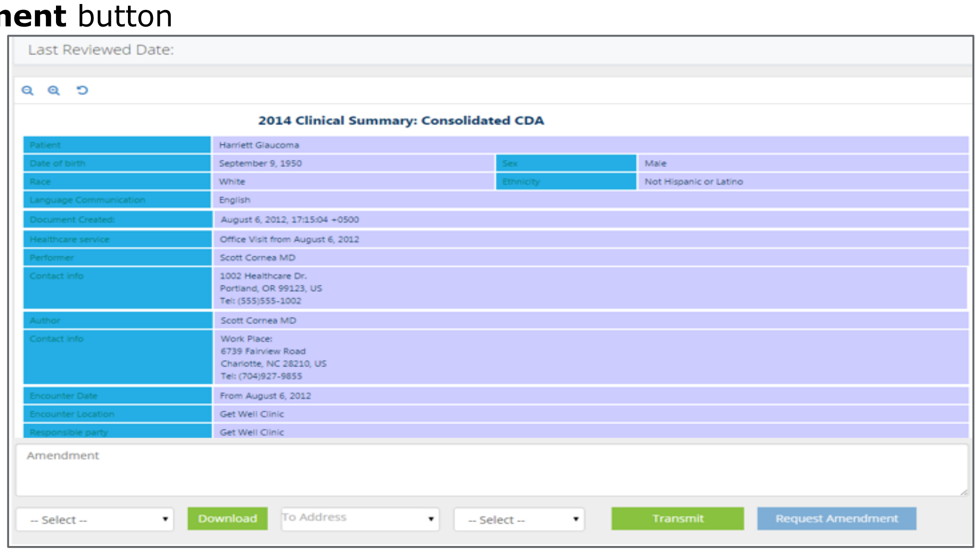
2. Select from the drop down: Human Readable, Electronic or Both, then select the **Download** button



3. Free type in the direct address in the **To Direct Mail** field to transmit the health summary select from the drop down: Human Readable, Electronic or Both, then select the **Transmit** button



4. Free type in an amendment request in the **Amendment** field if you see something that needs to be added/changed from the visit summary, then select the **Request Amendment** button

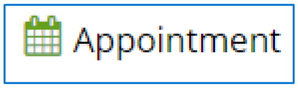


Section 10: Appointment

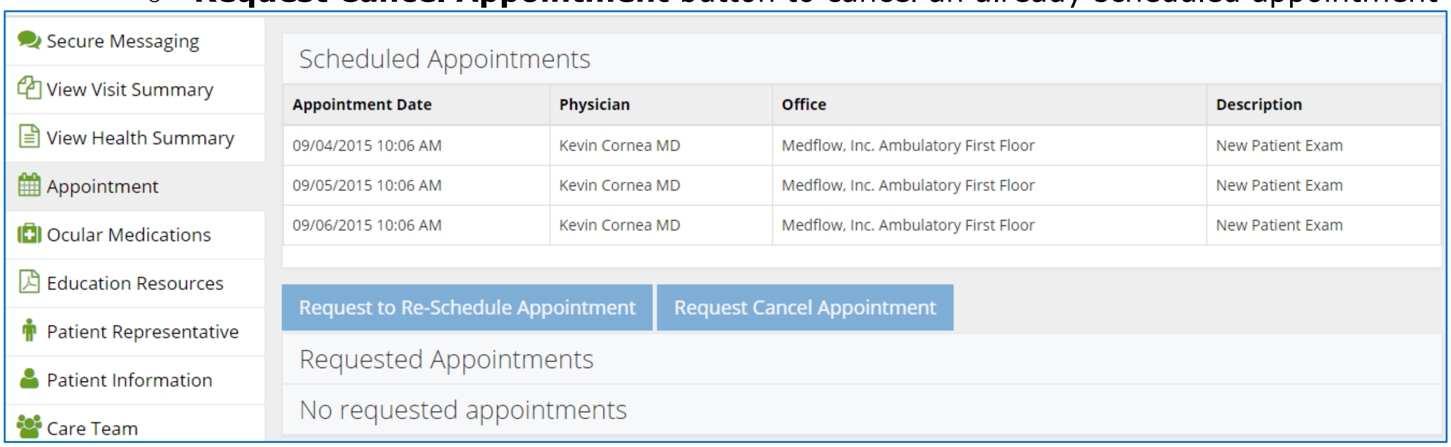
The Appointment section displays a list of existing appointments and enables the patient to request a new appointment, re-schedule appointment or cancel an appointment.

Note: All appointments pull from the Practice Management System into the Patient Portal. For testing purposes you must schedule the test patient in your PM system.

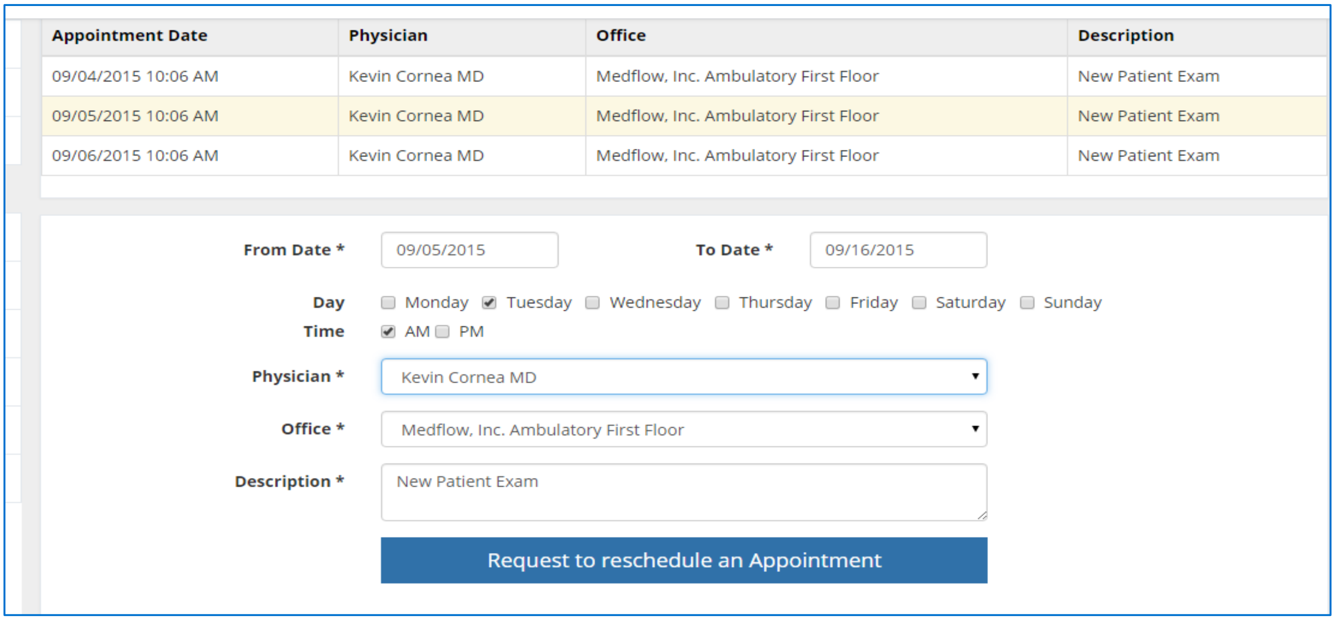
1. Select the **Appointment** tab



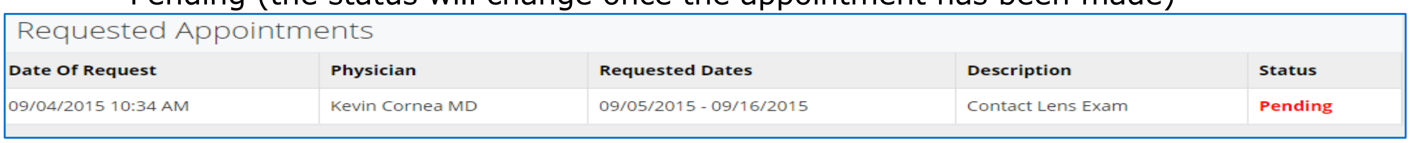
2. All Scheduled Appointments will populate at the top of the list
3. Select one of the following tabs:
   - **Request to Re-Schedule Appointment** button to send a secure message to the clinic to reschedule an appointment
   - **Request Cancel Appointment** button to cancel an already scheduled appointment



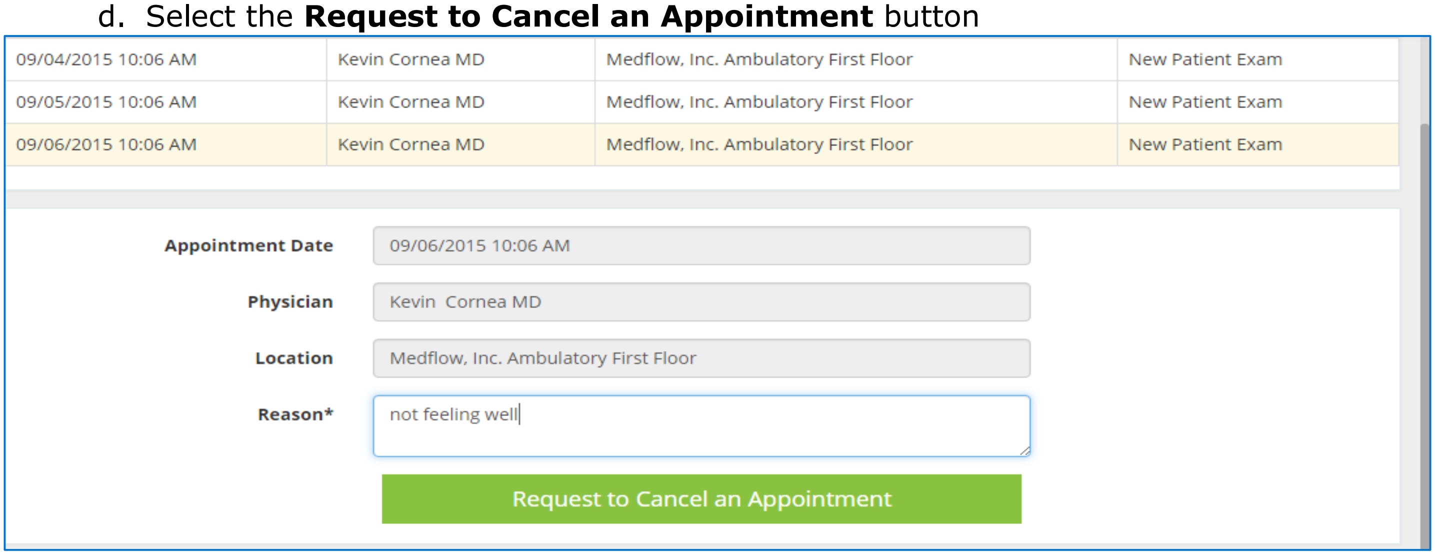
4. Request to **Re-Schedule Appointment**
   a. Highlight the **Scheduled Appointment**
   b. Select the **Request to Re-Schedule Appointment** button
   c. Select the **From Date** (date already scheduled), then **To Date** (date you are requesting)
   d. Place a check mark for the **Day** you want the appointment, check the **Time** for AM or PM or check both
   e. Select the **Physician** from the drop down
   f. Select the **Office** from the drop down
   g. Type in a **Description** of the appointment (defaults to the description from the appointment already scheduled in the PM system)
   h. Select the **Request to reschedule an Appointment** button



i. Requested Appointments will display at the bottom of the screen with a **Status** of Pending (the status will change once the appointment has been made)



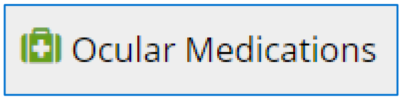
5. Request Cancel Appointment
   a. Highlight the **Scheduled Appointment**
   b. Select the **Request Cancel Appointment** button
   c. Type in the **Reason** for canceling the appointment
   d. Select the **Request to Cancel an Appointment** button



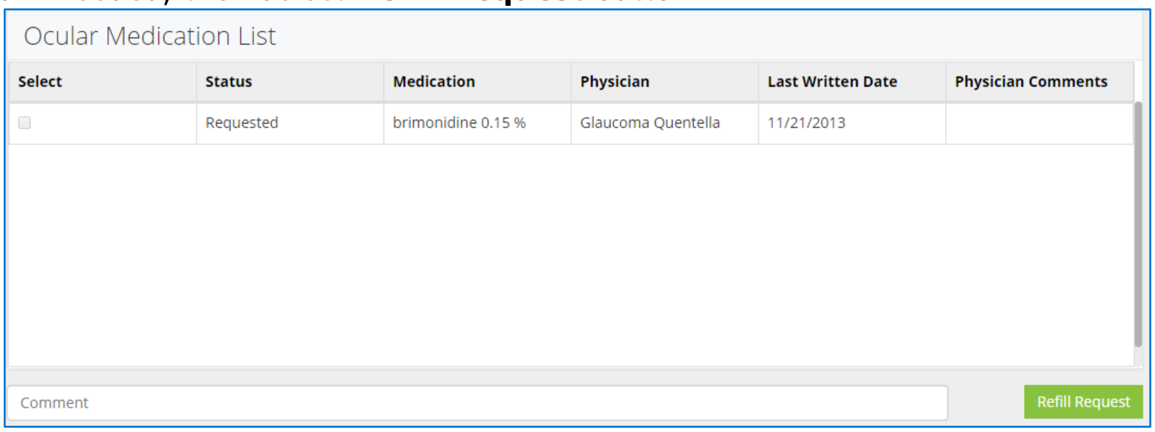
Section 11: Ocular Medications

The Ocular Medications section allows the patient to send a secure message to the physician requesting a medication refill.

1. Select the **Ocular Medications** tab



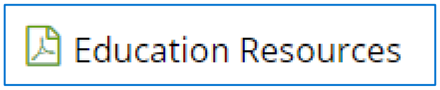
2. Highlight the Ocular Medications you need to have refilled and free type in the **Comment** field if needed, then select **Refill Request** button



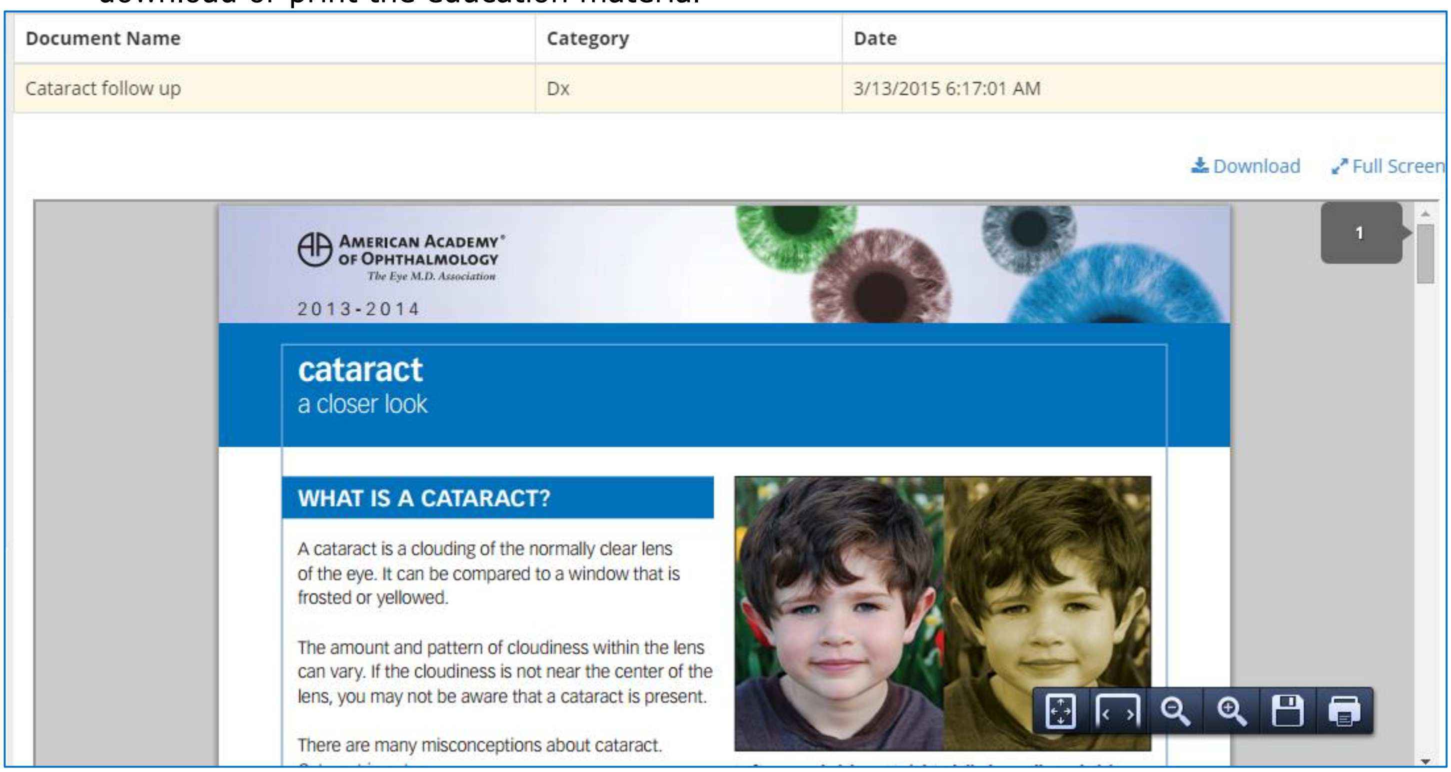
Section 12: Education Resources

The Education Resources section provides the patient with videos and documentation pertinent to their care. This gives the patient a better understanding of their health and to make informed lifestyle adjustments. Patient-specific education resources http://www.healthit.gov/providers-professionals/achieve-meaningful-use/core-measures-2/patient-specific-education-resources

1. Select the **Education Resources** tab



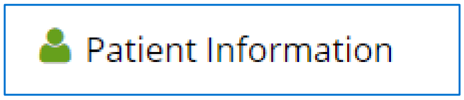
2. Highlight the **Document Name** to open the education material
3. Select **Download** to save to your computer
4. Select **Full Screen** to open the document or video in full screen mode
5. Use the Icons located at the bottom of the screen to minimize or maximize the material, download or print the education material



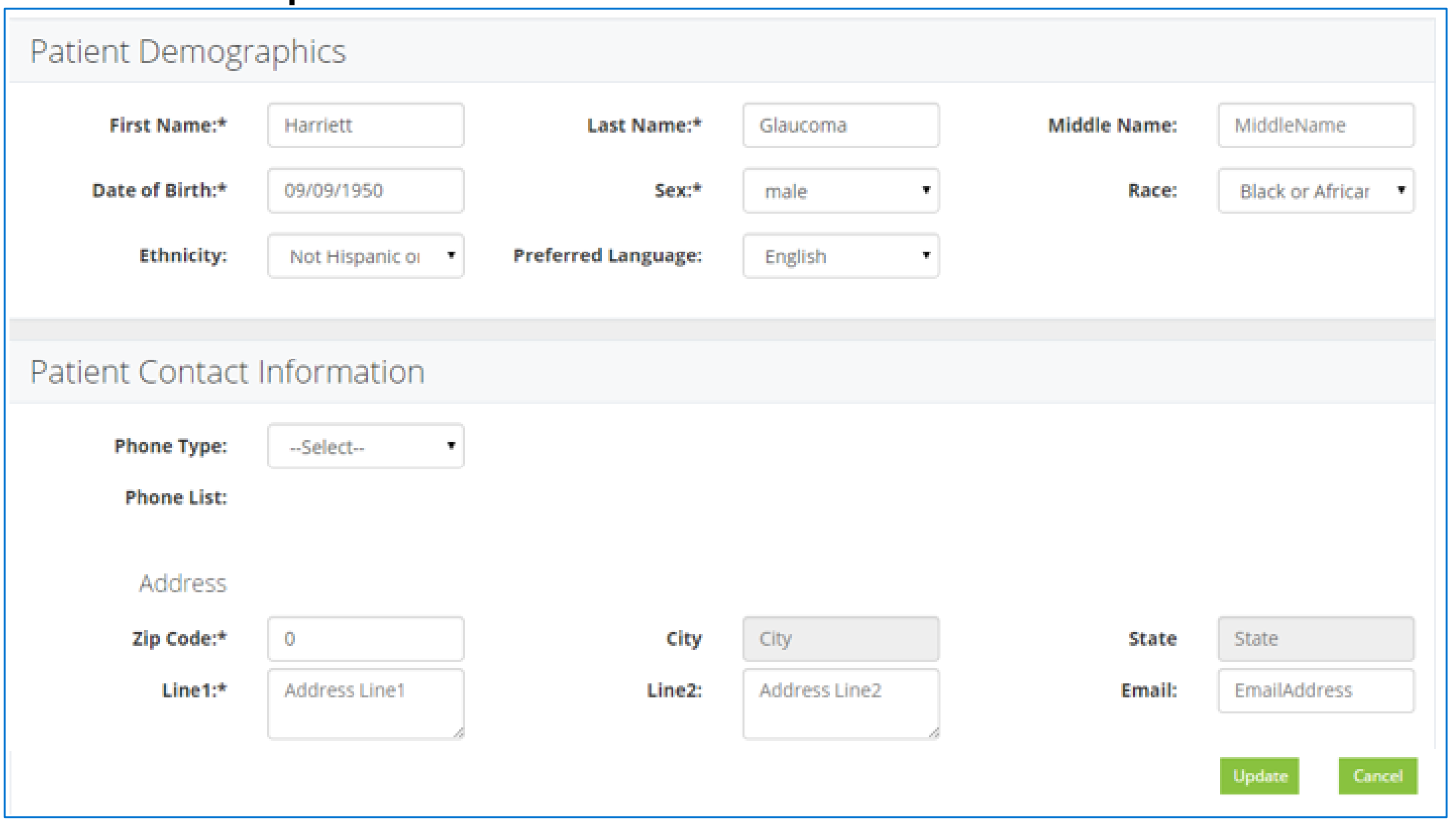
Section 13: Patient Information

The Patient Information section allows the patient to see the demographics and contact information that was entered into their chart. The patient can update their information and a secure message will be sent to the clinic to change the information within the Practice Management System.

1. Select the **Patient Information** tab



2. The Patient can make up dates to their Demographics and Contact Information, then select the **Update** button



Section 14: Care Team

The Care Team section provides the patient with information on the clinical staff. This feature will help the patient with putting a face to a name.

1. Select the **Care Team** icon

   Care Team

2. Select a name from the list to open a bio of the person selected

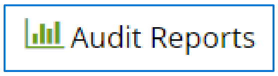
   Care Team

Physician Name	Title
Jim Retina	MD
Scott Cornea	MD
Quentella Glaucoma	MD

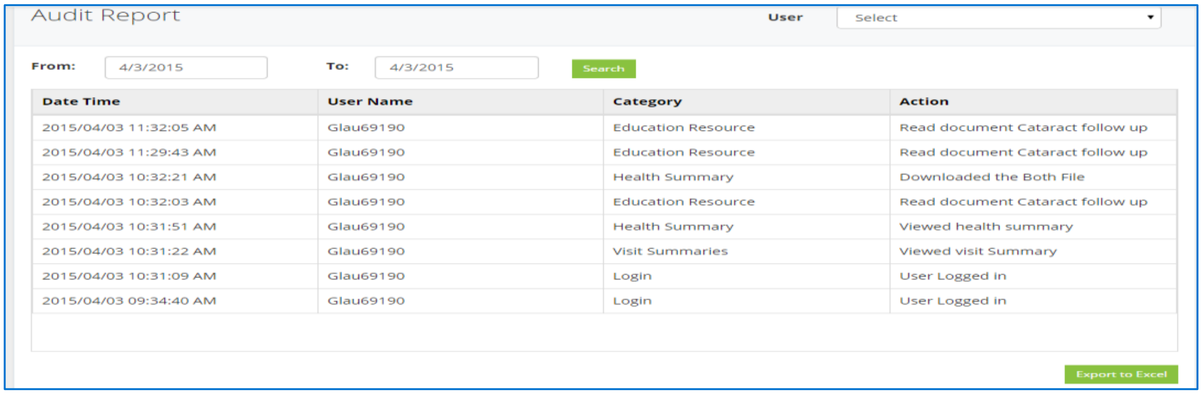
Section 15: Audit Reports

The Audit Report automatically logs actions performed within the portal.

1. Select the **Audit Reports** tab



2. Select a **User** that has access to the patient portal
3. Select a **From** and **To** date, then **Search**
4. Select the **Export to Excel** button to download the document to excel, then save and/or print the document from excel


Audit Report

User Select

From: 4/3/2015 To: 4/3/2015 Search

Date Time	User Name	Category	Action
2015/04/03 11:32:05 AM	Glau69190	Education Resource	Read document Cataract follow up
2015/04/03 11:29:43 AM	Glau69190	Education Resource	Read document Cataract follow up
2015/04/03 10:32:21 AM	Glau69190	Health Summary	Downloaded the Both File
2015/04/03 10:32:03 AM	Glau69190	Education Resource	Read document Cataract follow up
2015/04/03 10:31:51 AM	Glau69190	Health Summary	Viewed health summary
2015/04/03 10:31:22 AM	Glau69190	Visit Summaries	Viewed visit Summary
2015/04/03 10:31:09 AM	Glau69190	Login	User Logged in
2015/04/03 09:34:40 AM	Glau69190	Login	User Logged in

Export to Excel

Audit Report logs the following actions:

- Portal user's access to the Portal user training video
- List of items to which the Portal user was alerted
- Access to the Ambulatory Summary or a Clinical Summary, including the user, the patient (if different), the document type (Ambulatory Summary or Clinical Summary), the document date/time, whether the document was viewed, downloaded and/or transmitted to a third party, in case it was downloaded or transmitted to a third party, whether it was in a human-readable form or formatted according to the HL7 Consolidated CDA standard, and if transmitted to a third party, the Direct address of the intended recipient. In case a document is transmitted to a third party, upon message delivery notification, the Portal shall log the success or failure of the delivery
- Creation, update or deletion of any Automation and Trigger Rule, including the type of document (Ambulatory Summary and/or Clinical Summary), the format (human-readable and/or Consolidated CDA), and the Direct address of the destination
- Explicit patient PHI Privacy Requests, and shall include the Patient TM, the patient (if different), the type of request (Notice Request, Access Request, Amendment Request, Disclosures Accounting Request, or Restriction Request)
- Access to patient-specific education resources, including the user (patient or authorized representative), the education resource(s) accessed, the type of access (view and/or print)
- Documentation of family health history, documentation of patient's prior health history, documentation of patient's current smoking status, documentation of patient's medication adherence, documentation of patient's current problems status, including the user and the patient (if different)

Section 16: Tips for Launching the Portal

Advertise the portal by posting signs, using telephone on-hold messages, distributing flyers and letters to patients, and staff wearing “Ask me about the portal” buttons.

Make it everyone’s job to encourage using the portal, from front-desk and telephone staff to physicians. Develop talking points for staff that encourage patients to sign up and use the portal.

Develop policies and procedures for response times for messages and systems for routing and responding to messages.

Phase in the portal rollout by pilot testing it with a few physicians or clinical sites first. Start by activating a few features and rollout new features over time.

Minimize potential loss of patient interest by simplifying the registration process. Try bulk enrollment or having patients register at kiosks in the clinic. Designate staff to assist patients and troubleshoot.

Educate patients about what kinds of communication are appropriate via the portal, how and when providers will use messaging, and when to check the portal for lab results.

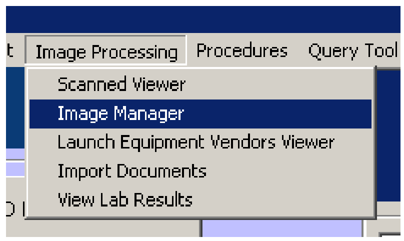
http://www.healthit.gov/providers-professionals/achieve-meaningful-use/core-measures-2/patient-specific-education-resources

Section 17: Medflow v8.1 Workflow (Phase 1)

Patient Picture

Patient Picture functionality in Medflow v8.1 Phase 1: The Patient Picture must already exist in the patient's chart *OR* taken prior to generating the activation key. This workflow is required if you would like for the Patient's Picture to display in the Patient Portal.

Capturing the Patient Picture is still processed by accessing the Clock screen with the patient in context, select Image Processing drop down, then Image Manager.



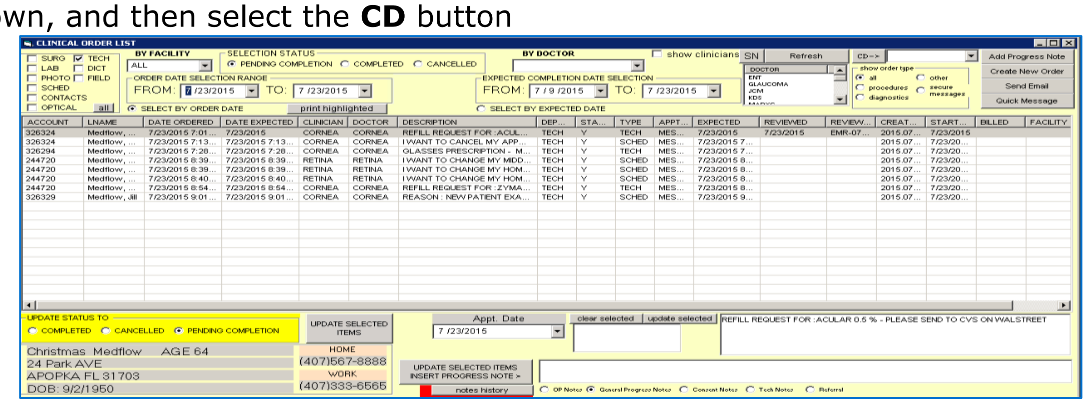
Secure Messages

Secure Messages functionality in Medflow v8.1 Phase 1: All incoming and outgoing Secure Messages are displayed within the Clinical Order List in Medflow v8.1 and the Patient Portal. Messages can be generated initially by the Physician in Medflow ***OR*** by the Patient within the Patient Portal. All Secure Messages are displayed within the Clinical Order List in Medflow (as structured data). The technician has the ability to view the message and type notes in the patient's chart and/or send the message to the physician within Medflow.

Technician workflow in facilitating the patient message and/or routing to the physician within Medflow:

1. Select the **Technician** drop down, then **Tech Orders**
2. The messages will display under the **TECH** department in the Clinical Order List
3. Highlight the order from the list, select **notes history** button, then free type in the text box beside the **UPDATE SELECTED ITEMS INSERT PROGRESS NOTE** button
4. Select **UPDATE SELECTED ITEMS INSERT PROGRESS NOTE** button (the message will then go to the patient portal)

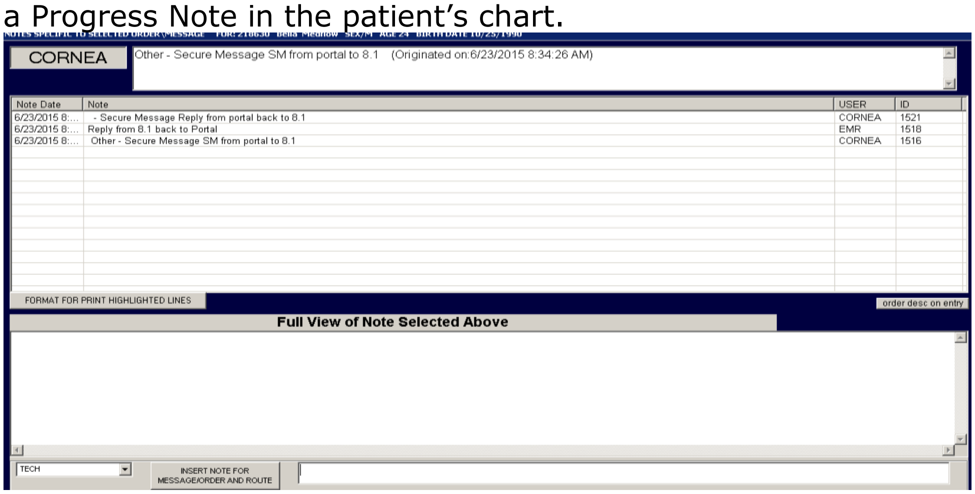
Note: If routing the message to the physician, highlight the message, select the physician from the drop down, and then select the **CD** button



Physician workflow in responding to the patient message from the doctor sign chart screen:

1. Select the **Doctor Function** drop down, then **Sign Charts**
2. Highlight the Message, then select the **PN** button

3. Type in a response to the patient's message at the bottom of the screen in the free text box beside the **INSERT NOTE FOR MESSAGE ORDER AND ROUTE** button, then select the **INSERT NOTE FOR MESSAGE ORDER AND ROUTE** button
   Responding to patient messages from the doctor sign chart screen is only allowed if the physician is logged in. The message is then removed from the Clinical Order List and saved as a Progress Note in the patient's chart.

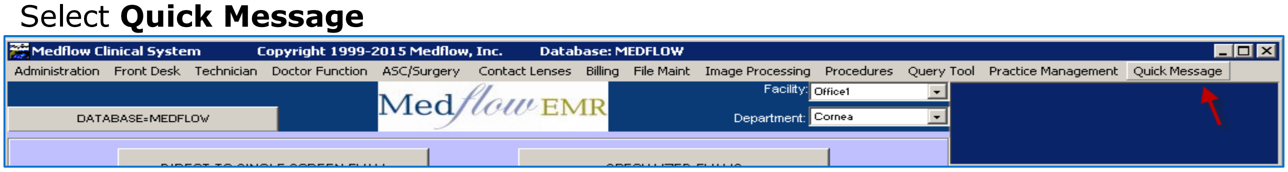


Physician workflow in responding to a message directly from the Clinical Order List:

1. Select the **Technician** drop down, then **Tech Orders**
2. The messages will display under the **TECH** department in the Clinical Order List
3. Select the order from the list, then select the **notes history** button
4. Free type in a response to the patient's message at the bottom of the screen beside **INSERT NOTE FOR MESSAGE ORDER AND ROUTE**, then select the **INSERT NOTE FOR MESSAGE ORDER AND ROUTE** button to send to the patient portal

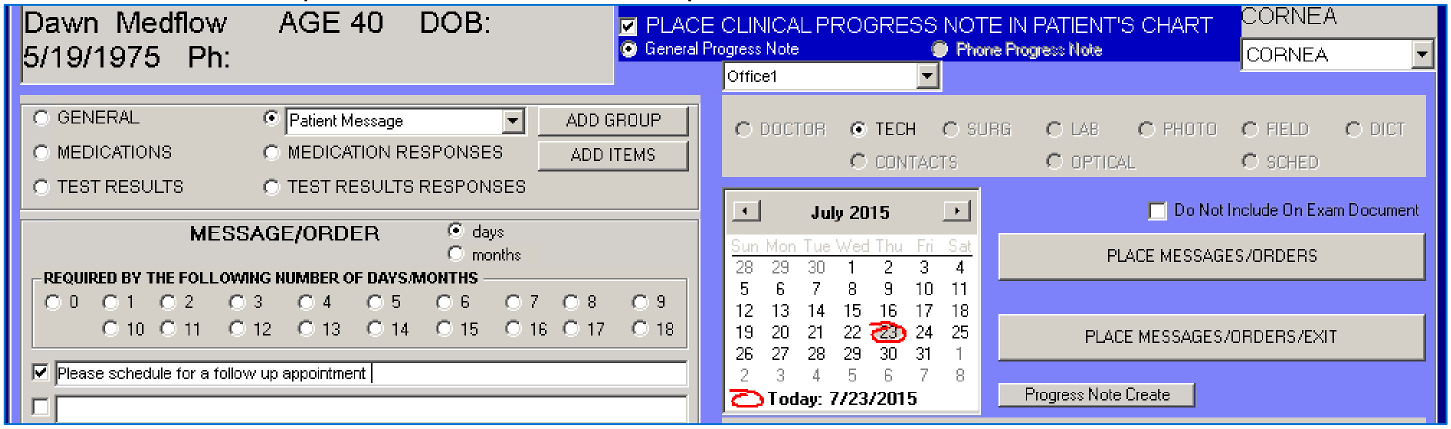
Physician initiates the message to send to the patient:

1. Access the Clock screen with the correct patient in context
2. Select **Quick Message**



3. Select **Patient Message** from the drop down by ADD GROUP (all other radio buttons for department will be greyed out except for TECH)
4. Type your message or choose from your preconfigured list

5. Select **PLACE MESSAGES/ORDERS/EXIT** button, this sends the message to the Patient Portal for the patient to view and/or respond



Section 18: Admin (Configurations) – Temporally unavailable to the user

The Medflow Patient Portal has an Admin (Configuration) database for uploading Web Links, Care Team, Clinical Information (with logo), Disable Appointment Request, Reports and Deactivate Accounts.

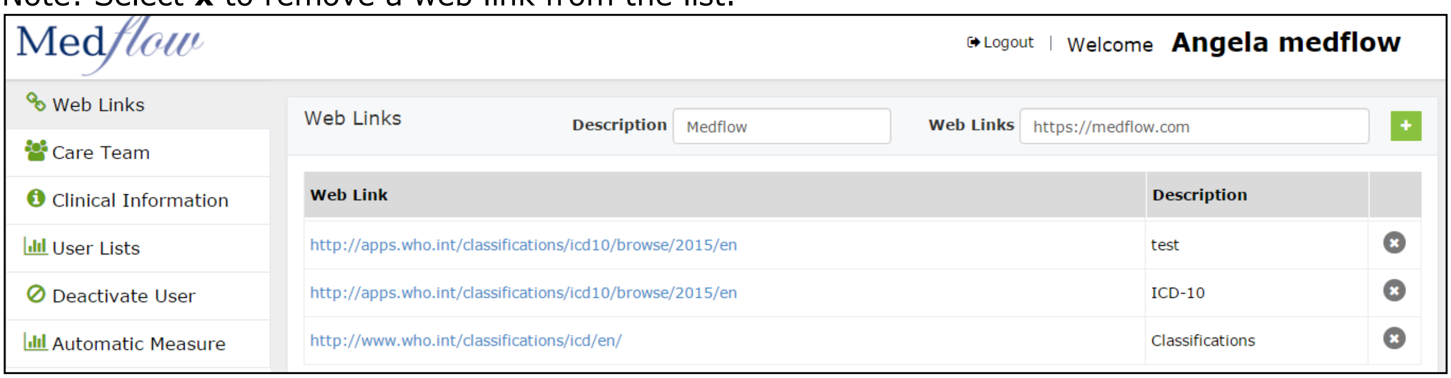
Medflow configures the Patient Portal for the customer at this time. This section of the guide shows the areas that are customizable within the Patient Portal.

1. **Web Links:**

Friendly web site links the Clinic can provide on the portal (ex: practice web site, AAO eyeSmart web site, and other web sites).

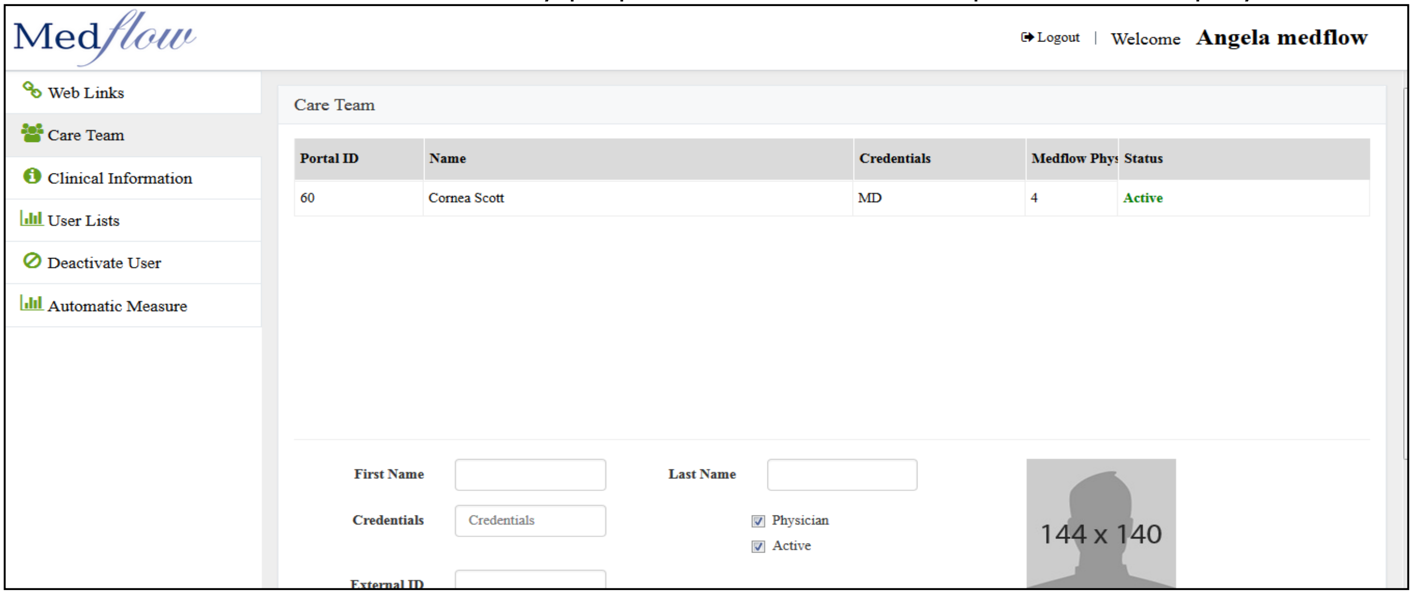
a. Access the Admin (Configuration) database
b. Select the **Web Links** icon
c. Type in a **Description** of the web link
d. Type in the web address in the **Web Links** field, the select the **+** sign (use http:// or https://)

Note: Select **x** to remove a web link from the list.



2. **Care Team:**

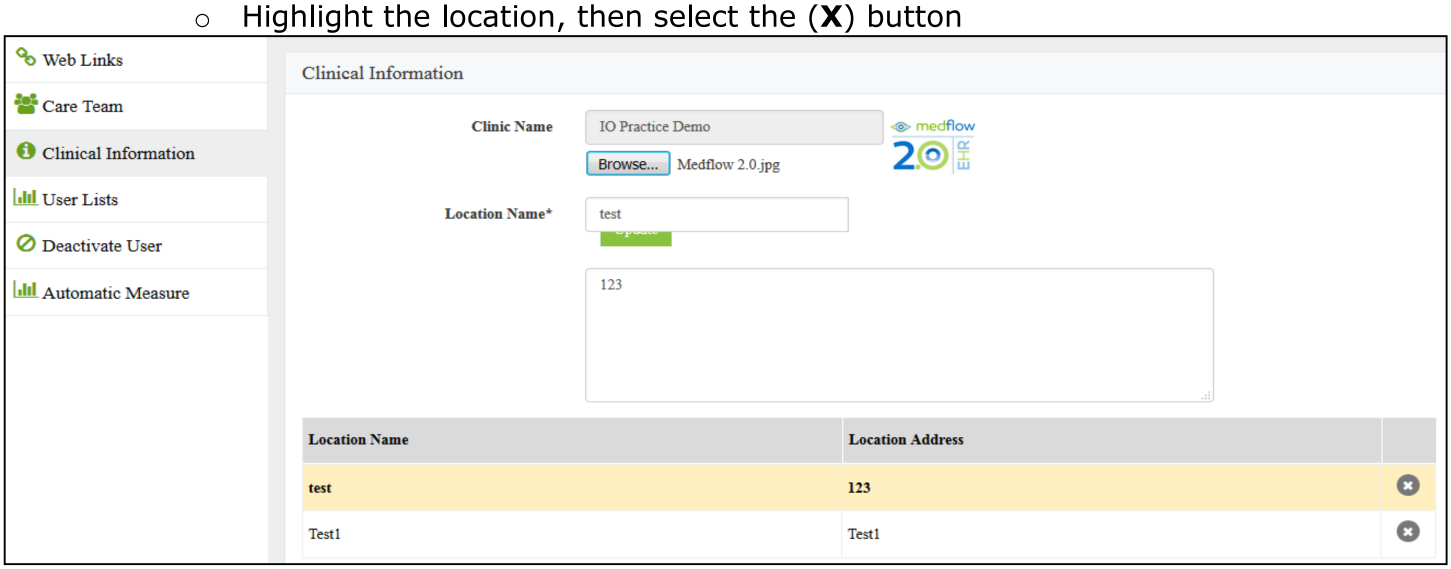
The Care Team section is for view only purposes at this time. This portion is set up by the EHR.



3. **Clinic Information:**

The Clinical Information section is for adding the main facility and attaching the Clinic's logo. The logo will display within the Patient Portal.

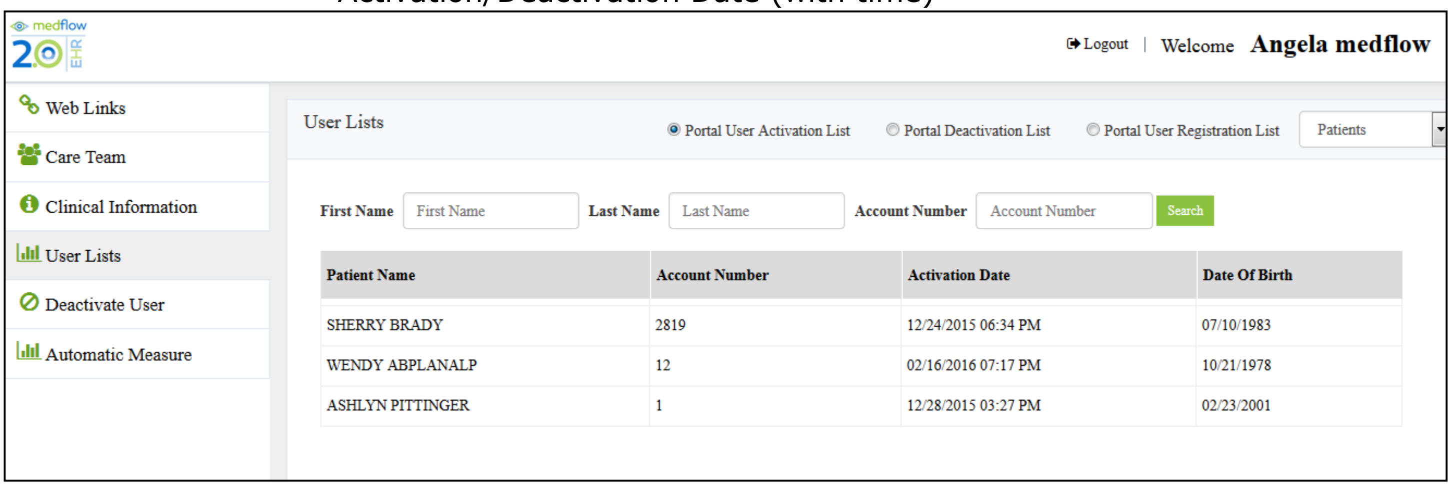
a. Select the **Clinical Information** icon
b. Free type the main **Location Name**, enter the address, select the **Update** button
c. Select the Location Name, then select the **Browse** button, select the image saved on your computer to load
   - Select (X) to remove the location if needed
   - Edit Location
     - Highlight the location, then make the changes, select the **Update** button
   - Remove Location
     - Highlight the location, then select the (**X**) button



4. **User Lists:**

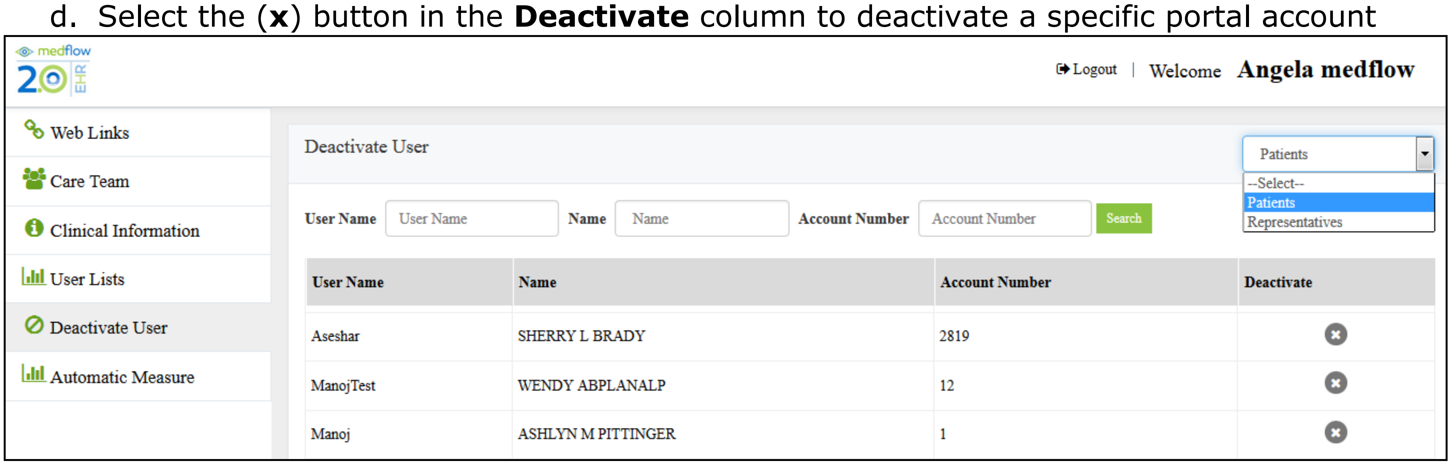
The User Lists section provides a Portal User Activation List and Portal Deactivation List.

a. Select the **User Lists** icon
b. Select **Portal User Activation List** or **Portal Deactivation List** or **Portal User Registration List** to filter the list
c. Select **Patient** or **Representative** from the drop down list
   - **Patient:**
     - Option to search for a specific patient, by Patient First Name, Last Name or Account Number, then select the **Search** button
     - Displays the Patient Name, Account Number and Activation/Deactivation Date (with time) and Date of Birth
   - **Representative:**
     - Displays the Representative Name, Patient Name, Account Number and Activation/Deactivation Date (with time)



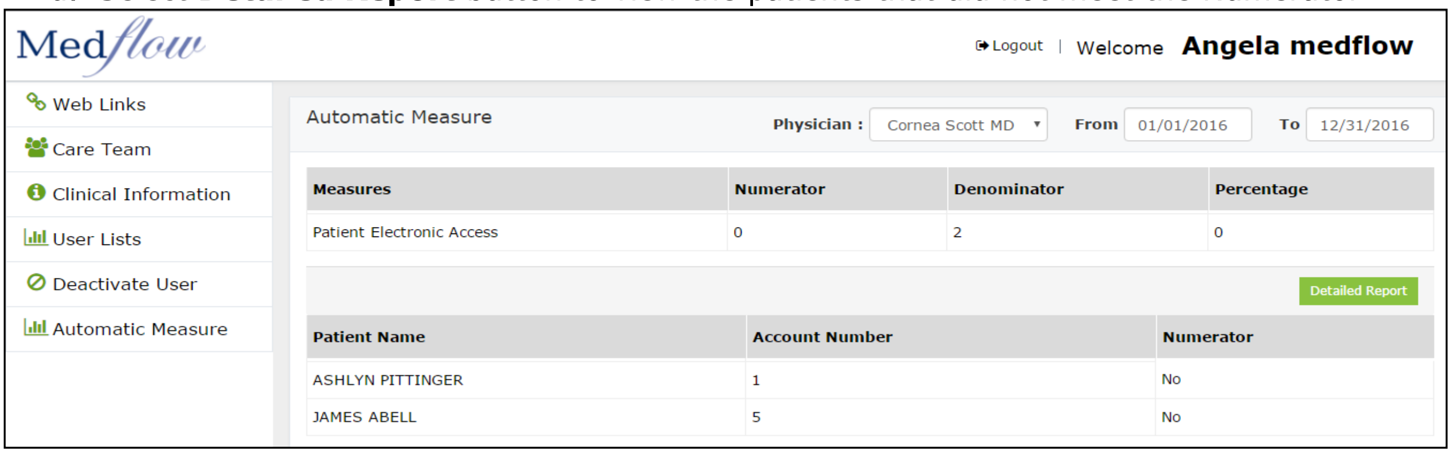
5. **Deactivate User:**

a. Select the **Deactivate User** icon
b. Select **Patients** or **Representatives** from the drop down list
c. Search by User Name, Patient /Representative Name or by Account Number
d. Select the (**x**) button in the **Deactivate** column to deactivate a specific portal account

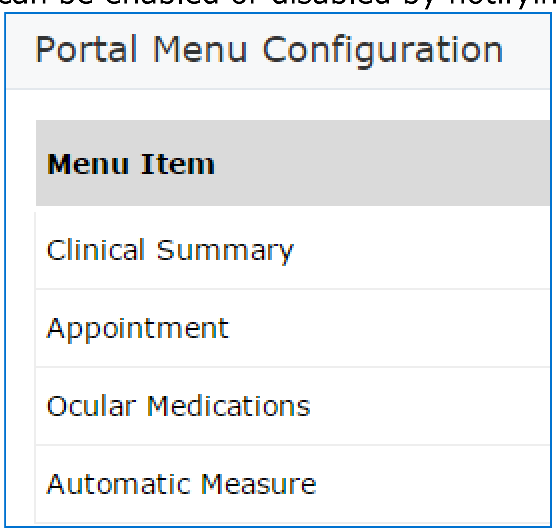


6. **Automatic Measure:**
The Automatic Measure provides a Numerator, Denominator and Percentage for the Patient Electronic Access objective for Meaningful Use. All other objectives are displayed within the EHR system.

a. Select the **Automatic Measure** icon
b. Select the **Physician** from the drop down
c. Select the **From** and **To** date (Reporting period)
d. Select **Detailed Report** button to view the patients that did not meet the Numerator



Note: The below Menu Items can be enabled or disabled by notifying your EHR system.



Section 19: Features Coming Soon

Medflow is developing additional features for the Patient Portal. Please stay tuned for upcoming information on the new features.

- Bill Pay (works with MF+ PM system)
- Update Patient History
- Patient Surveys