



# Patient Portal

## Quick Reference Guide

(Patient View)

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## 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 Quick Reference 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. Follow the steps below for logging into the Patient Portal.

1. Access the following website in Internet Explorer: <https://myhealth.acumenehr.com>.
2. Enter the username and temporary password assigned by the provider (doctor's office).
3. Click the **Sign In** button.

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



The screenshot shows the Acumen Physician Solutions Patient Portal login interface. At the top left is the Acumen Physician Solutions logo. Below it, the text "Patient Portal" is displayed. A light blue bar contains the text "Login to the Patient Portal". The main area features a photograph of two healthcare professionals on the left. On the right, there are two input fields: "Username: \*" with the placeholder "username" and "Password: \*" with masked characters. Below these fields is a blue "Sign In" button, which is highlighted with a red rectangle. Underneath the button is a link that says "Forgot your password?". At the bottom of the page, a red warning message states: "The system should only be accessed by authorized users."

- 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](#)

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



Larry Southwood  
[Logout](#)

Appointments

Health Record

Messages

Profile

58:47 remaining in session

**Profile**

**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](#)

- 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 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.

1. ACCEPTANCE OF TERMS OF USE AND WEBSITE PRIVACY POLICY

To access or use this Site, you must agree to be bound by the following terms and conditions (“Terms of Use”) and our website privacy policy located at <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](#)
© 2013 Acumen Physician Solutions, LLC - All Rights Reserved  
(ACUEHRWEBQA01)
[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*

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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 use the Site.

## Patient Portal Header

The Patient Portal header is the top section of the home page and is visible throughout the website. 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.

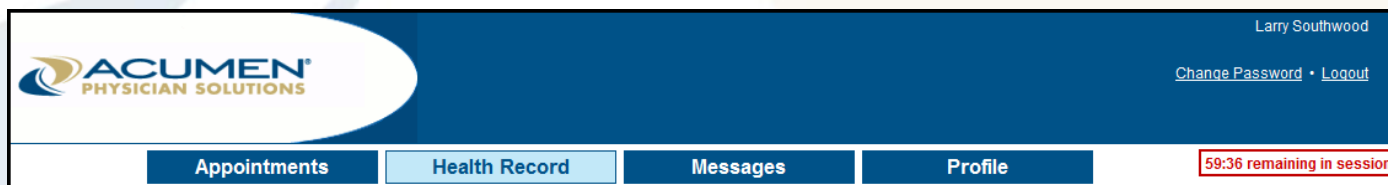
A **Logout** link is also available for clicking to exit the Patient Portal.



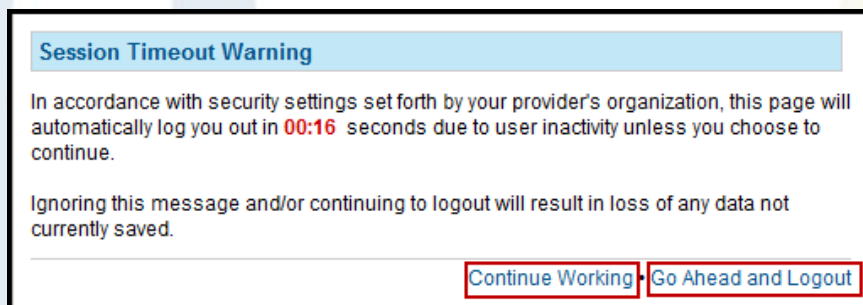
If an authorized representative has access to more than one Patient Portal account, or if an authorized representative is also a patient with the same provider (doctor's office), the user can log into the Patient Portal with the same username and password. The user can then select his/her name or another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



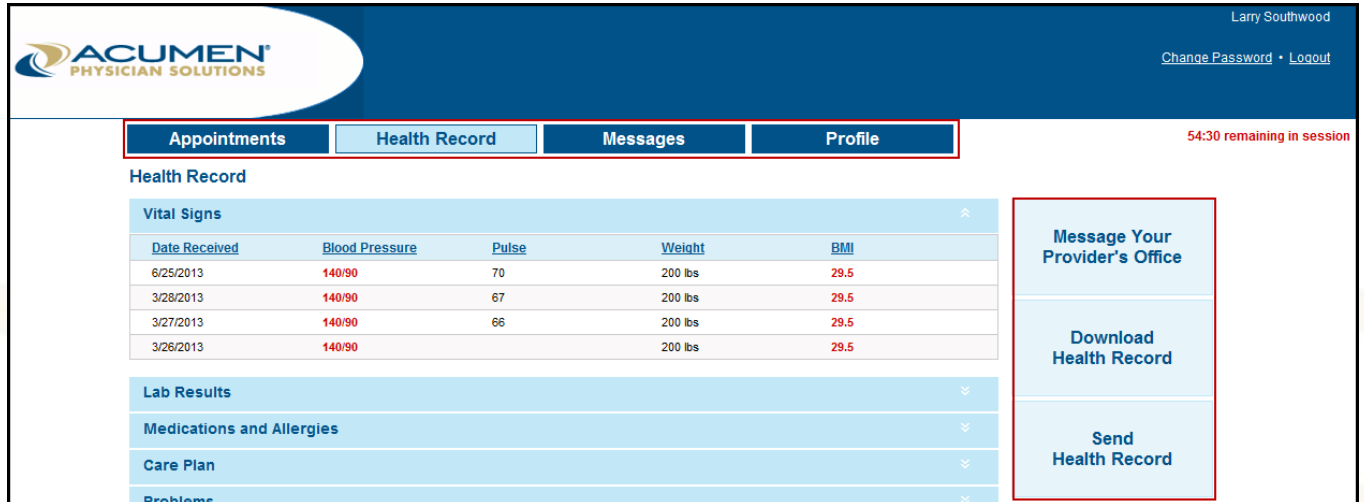
A pop-up window with a Session Timeout Warning displays 30 seconds before a user is logged out. Click **Continue Working** on the warning window to stay logged into the Patient Portal and reset the timer. Or, click **Go Ahead and Logout** to exit the Patient Portal.





## 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, and Profile. Each tab contains specific patient information, as well as additional action buttons for that tab.



ACUMEN<sup>®</sup> PHYSICIAN SOLUTIONS

Larry Southwood  
Change Password • Logout

54:30 remaining in session

Appointments Health Record Messages Profile

Health Record

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/25/2013	140/90	70	200 lbs	29.5
3/28/2013	140/90	67	200 lbs	29.5
3/27/2013	140/90	66	200 lbs	29.5
3/26/2013	140/90		200 lbs	29.5

Lab Results

Medications and Allergies

Care Plan

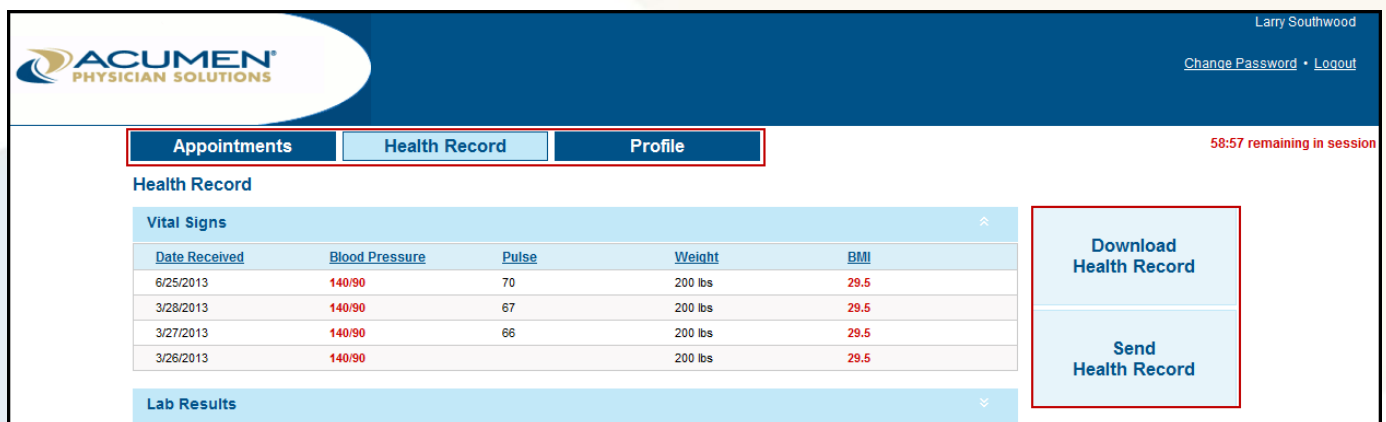
Problems

Message Your Provider's Office

Download Health Record

Send Health Record

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



ACUMEN<sup>®</sup> PHYSICIAN SOLUTIONS

Larry Southwood  
Change Password • Logout

58:57 remaining in session

Appointments Health Record Profile

Health Record

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/25/2013	140/90	70	200 lbs	29.5
3/28/2013	140/90	67	200 lbs	29.5
3/27/2013	140/90	66	200 lbs	29.5
3/26/2013	140/90		200 lbs	29.5

Lab Results

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 8 sections: Vital Signs, Lab Results, Medications and Allergies, Care Plan, Problems, Immunizations, 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
Profile

58:43

Health Record

Vital Signs

Date Received	Blood Pressure	Pulse	Weight	BMI
6/25/2013	140/90	70	200 lbs	29.5
3/28/2013	140/90	67	200 lbs	29.5
3/27/2013	140/90	66	200 lbs	29.5
3/26/2013	140/90		200 lbs	29.5

Lab Results

Medications and Allergies

Care Plan

Problems

Immunizations

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 last 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, if it is **Abnormal**, and **Education** available. In the **Abnormal** column, a red **L** indicates the test results were lower than the normal range, a red **H** indicates the test results were higher than the normal range, and a dash (-) indicates the test was not abnormal.

Click the **Education** link in the **Education** column, if available, to access online information, provided by MedlinePlus, regarding a laboratory test.

Health Record

Vital Signs

Lab Results

Date Range: Last 12 Months

Date	Panels																																								
6/13/2013	Chem 7																																								
<div>Chem 7</div> <table> <tr> <th>Test Name</th> <th>Result</th> <th>Normal</th> <th>Abnormal</th> <th>Education</th> </tr> <tr> <td>BUN (Urea Nitrogen)</td> <td>12 mg/dL</td> <td>7-23</td> <td>-</td> <td></td> </tr> <tr> <td>Carbon Dioxide, Total</td> <td>25 mEq/L</td> <td>96-107</td> <td>L</td> <td></td> </tr> <tr> <td>Chloride, Serum</td> <td>4.0 mEq/L</td> <td>96-107</td> <td>L</td> <td></td> </tr> <tr> <td>Creatinine, Serum</td> <td>7 mg/dL</td> <td>0.6-1.3</td> <td>H</td> <td></td> </tr> <tr> <td>Glucose, Serum</td> <td>121 mg/dL</td> <td>70-100</td> <td>H</td> <td></td> </tr> <tr> <td>Potassium, Serum</td> <td>4.2 mEq/L</td> <td>3.5-5.0</td> <td>-</td> <td></td> </tr> <tr> <td>Sodium, Serum</td> <td>142 mEq/L</td> <td>132-145</td> <td>-</td> <td></td> </tr> </table>		Test Name	Result	Normal	Abnormal	Education	BUN (Urea Nitrogen)	12 mg/dL	7-23	-		Carbon Dioxide, Total	25 mEq/L	96-107	L		Chloride, Serum	4.0 mEq/L	96-107	L		Creatinine, Serum	7 mg/dL	0.6-1.3	H		Glucose, Serum	121 mg/dL	70-100	H		Potassium, Serum	4.2 mEq/L	3.5-5.0	-		Sodium, Serum	142 mEq/L	132-145	-	
Test Name	Result	Normal	Abnormal	Education																																					
BUN (Urea Nitrogen)	12 mg/dL	7-23	-																																						
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Potassium, Serum	4.2 mEq/L	3.5-5.0	-																																						
Sodium, Serum	142 mEq/L	132-145	-																																						
3/27/2013	Chem 7																																								

## 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 to access online information, provided by MedlinePlus, regarding a 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			
<b>Medication List</b>			
Filter: <input checked="" type="checkbox"/> Active <input type="checkbox"/> Stopped			
Medication	Strength	Directions	Education
acetaminophen	500 mg	Take 1 tablet by mouth once a day as directed. Take as needed for back pain	<a href="#">Education</a>
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	<a href="#">Education</a>
furosemide	20 mg	Take 1 tablet by mouth once a day as directed	<a href="#">Education</a>
Lexapro (escitalopram)	10 mg	Take 1 tablet by mouth once a day as directed	<a href="#">Education</a>
Norvasc (amlodipine)	5 mg	Take 1 tablet by mouth once a day	<a href="#">Education</a>
<b>Allergy List</b>			
<a href="#">Allergy</a>			
aspirin			
Biaxin (clarithromycin)			
Iodine-Iodine Containing Group			
latex			
Levaquin (levofloxacin)			
Nsaid's 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 **Education** link in the **Education** column to access online information, provided by MedlinePlus, regarding a 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: <input checked="" type="checkbox"/> Acute <input checked="" type="checkbox"/> Chronic <input type="checkbox"/> Resolved		
Description	Status	Education
BENIGN HYPERTENSION	Chronic	<a href="#">Education</a>
CALCULUS OF KIDNEY	Chronic	<a href="#">Education</a>
CHR BLOOD LOSS ANEMIA	Chronic	<a href="#">Education</a>
DIABETES UNCOMPL TYPE I	Chronic	<a href="#">Education</a>
END STAGE RENAL DISEASE	Chronic	<a href="#">Education</a>
ESOPHAGEAL REFLUX	Chronic	<a href="#">Education</a>

## 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

<input checked="" type="checkbox"/> Adenovirus types 4 and 7	<input checked="" type="checkbox"/> IGIV	<input checked="" type="checkbox"/> rabies, intradermal injection
<input checked="" type="checkbox"/> adenovirus, type 4	<input checked="" type="checkbox"/> Influenza, high dose seasonal	<input checked="" type="checkbox"/> rabies, intramuscular injection
<input checked="" type="checkbox"/> adenovirus, type 7	<input checked="" type="checkbox"/> influenza, live, intranasal	<input checked="" type="checkbox"/> RIG
<input checked="" type="checkbox"/> anthrax	<input checked="" type="checkbox"/> influenza, live, intranasal, quadrivalent	<input checked="" type="checkbox"/> rotavirus, monovalent
<input checked="" type="checkbox"/> BCG	<input checked="" type="checkbox"/> Influenza, seasonal, injectable	<input checked="" type="checkbox"/> rotavirus, pentavalent
<input checked="" type="checkbox"/> botulinum antitoxin	<input checked="" type="checkbox"/> Influenza, seasonal, injectable, preservative free	<input checked="" type="checkbox"/> RSV-IGIV
<input checked="" type="checkbox"/> cholera	<input checked="" type="checkbox"/> influenza, seasonal, intradermal, preservative free	<input checked="" type="checkbox"/> RSV-MAb

Apply Filter Selection(s)

## 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 quick reference 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	Profile	59:46 re
Health Record				
Vital Signs				
Lab Results				
				Message Your Provider's Office

## Download Health Record

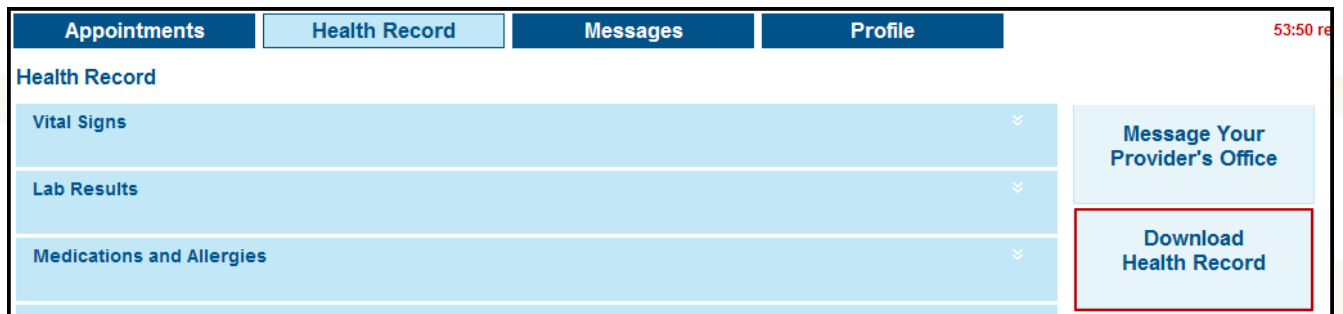
This action button allows a user to download a patient's health record from the provider (doctor's office) to a user's computer.

The user can download the following two options:

- Ambulatory Summary Document – document summarizing the patient's medical record
- Clinical Summary Document – document summarizing the patient's most recent visit

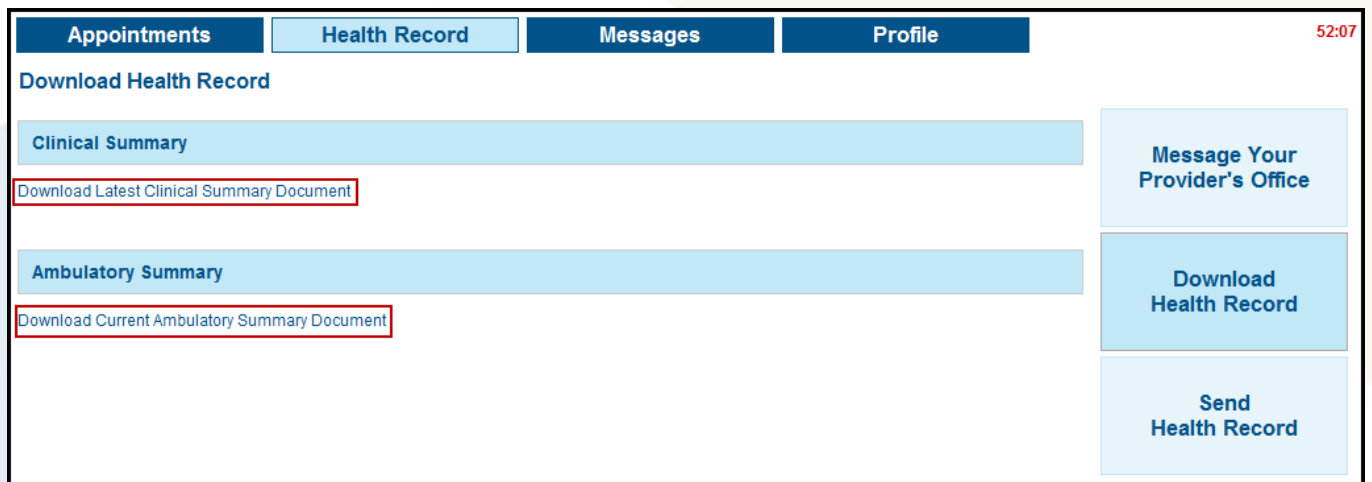
To download a health record:

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



The screenshot shows the Acumen nEHR interface with the 'Health Record' tab selected. The interface includes a top navigation bar with 'Appointments', 'Health Record', 'Messages', and 'Profile'. Below the navigation bar, there are three expandable sections: 'Vital Signs', 'Lab Results', and 'Medications and Allergies'. To the right of these sections, there are three buttons: 'Message Your Provider's Office', 'Download Health Record' (highlighted with a red box), and 'Send Health Record'. The 'Download Health Record' button is the one to be clicked according to the instructions.

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

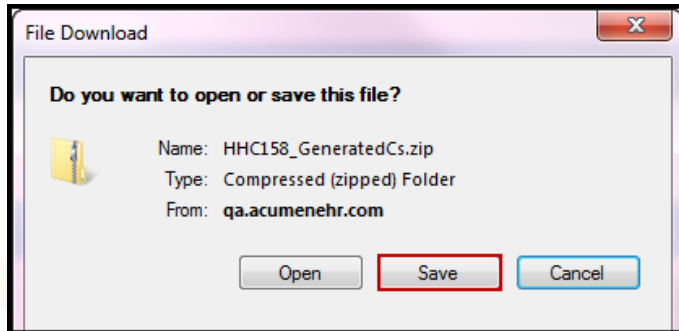


The screenshot shows the Acumen nEHR interface with the 'Download Health Record' section selected. The interface includes a top navigation bar with 'Appointments', 'Health Record', 'Messages', and 'Profile'. Below the navigation bar, there are two expandable sections: 'Clinical Summary' and 'Ambulatory Summary'. To the right of these sections, there are three buttons: 'Message Your Provider's Office', 'Download Health Record', and 'Send Health Record'. The 'Download Latest Clinical Summary Document' button (under Clinical Summary) and the 'Download Current Ambulatory Summary Document' button (under Ambulatory Summary) are both highlighted with red boxes, indicating they are the options to be selected.

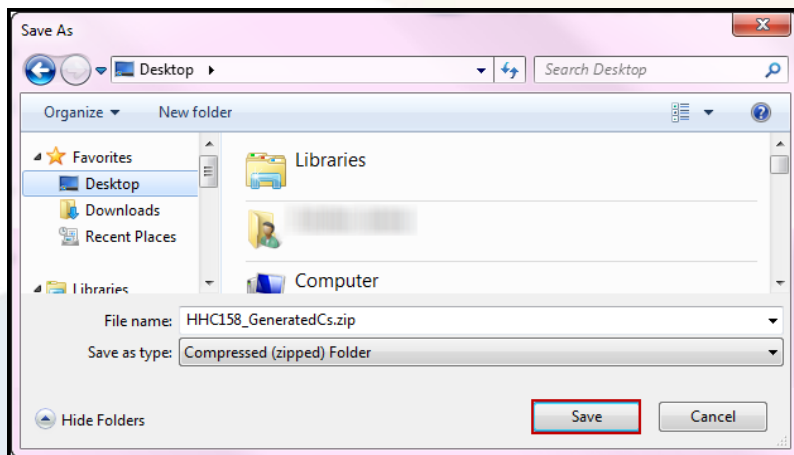


- Click the **Save** button on the **File Download** pop-up window to save the self-extracting zip file to a computer or portable device, such as a USB-Drive. The file name includes the patient's chart/medical record number followed by "\_GeneratedCs.zip".

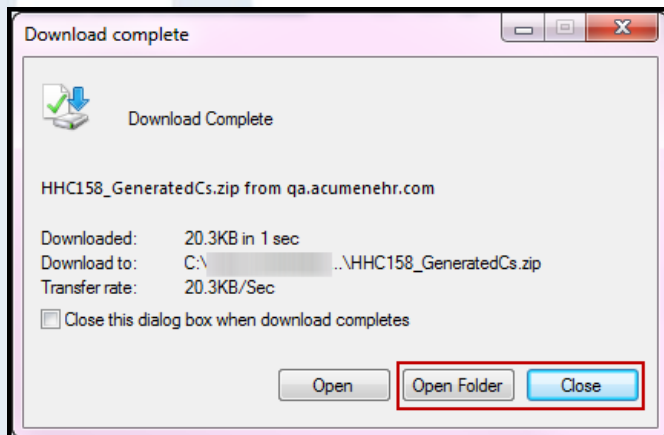
**Note:** Click the **Open** button to open the zip file and view its contents, if applicable (skip to step 7 to continue the opening process).



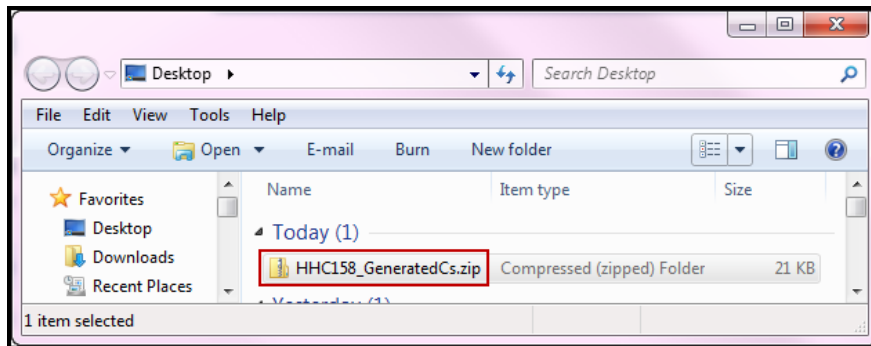
- Select the appropriate location for the file on the **Save As** pop-up window (note where the file is being saved). Click the **Save** button.



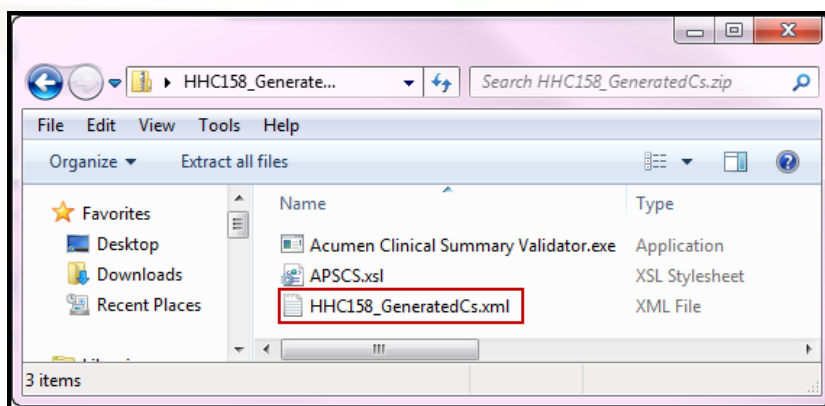
- Click the **Open Folder** button on the **Download Complete** pop-up window to view the zipped file. Otherwise, click the **Close** button to complete the downloading process.



6. Double-click the zipped file to view its contents.



7. Double-click the **GeneratedCs.xml** file.



The Clinical Summary displays in Internet Explorer as shown below:

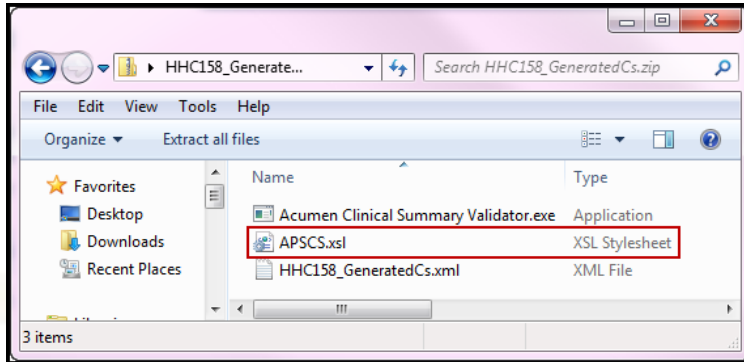
A screenshot of an Internet Explorer window displaying a clinical summary. The address bar shows the path to the XML file. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The page content is as follows:

<b>Clinical Summary for Larry Southwood</b>		DOB: 8/12/1974	Date of Visit: 11/01/2013
Sex: Male Ethnicity: Not Hispanic or Latino Primary Race: White			
<b>Instructions:</b> Follow up with endocrinologist for diabetes management.			
Reason for Visit: No reason for visit entered.			
Provider: David Murphy		Location: Hyperion Circle	
Appointments: 12/11/2013 10:00 AM		Care Team: David H. Murphy MD David Murphy	
Referrals: No referrals entered.			
<b>Vital Signs:</b>			
6/25/2013	Blood Pressure: 140/90	Pulse: 70	Weight: 200 lbs BMI: 29.5
3/28/2013	Blood Pressure: 140/90	Pulse: 67	Weight: 200 lbs BMI: 29.5

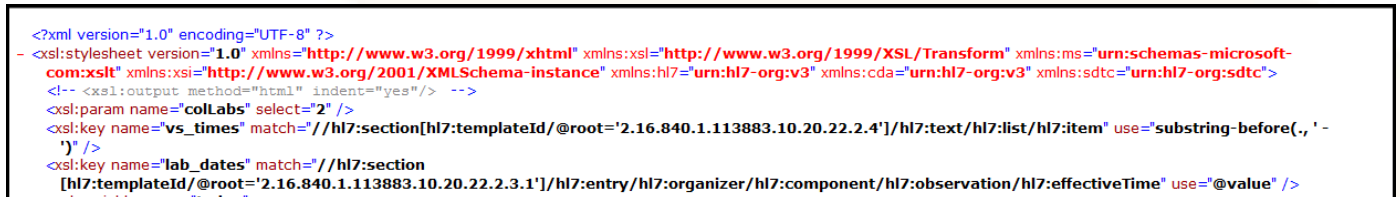
If the Clinical Summary does not display in Internet Explorer in readable form, or an error displays, follow the steps of the next two options:

### Option 1:

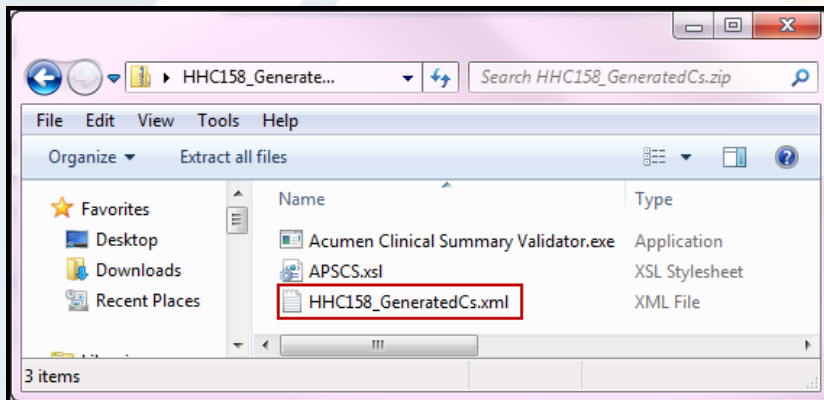
1. Double-click on the **.xsl** Stylesheet.



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

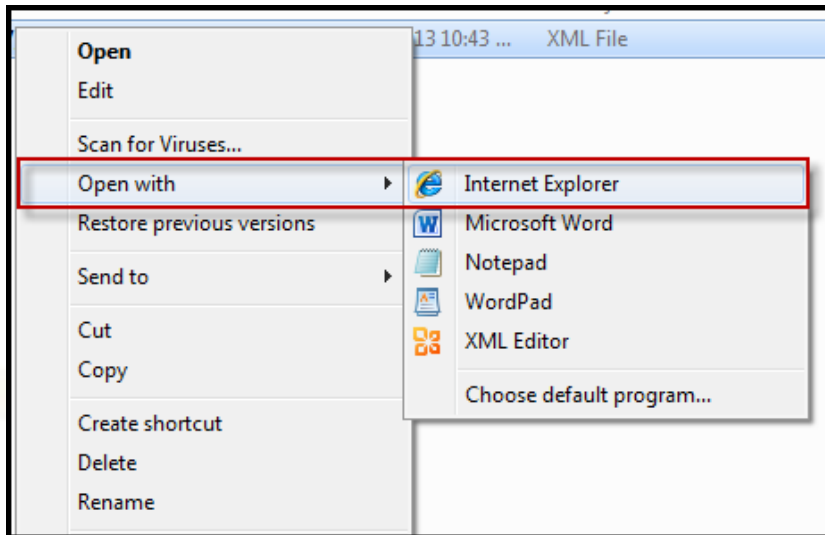


3. Double-click on the **GeneratedCs.xml** file to reopen the Clinical Summary. It displays in readable form.

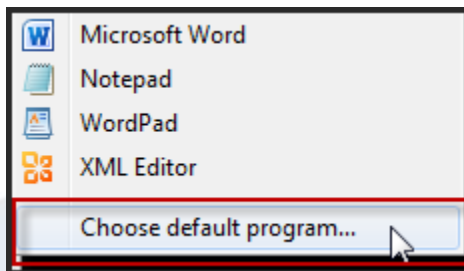


## Option 2:

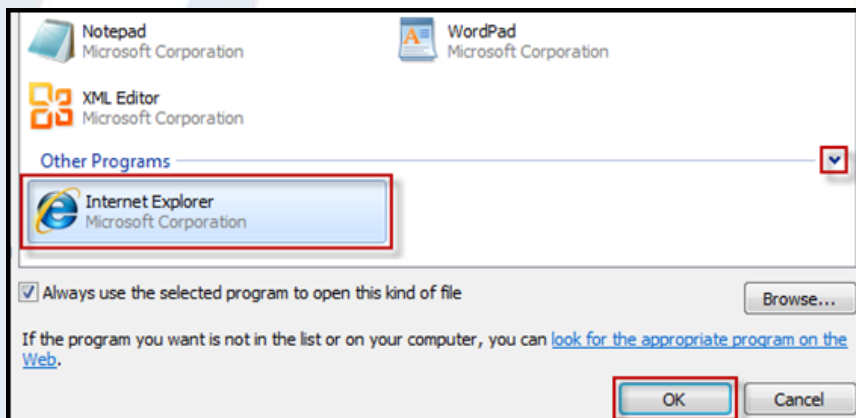
1. Right-click on the **GeneratedCs.xml** file. Select **Open with** and **Internet Explorer**.



2. If Internet Explorer does not display on the **Open with** menu, then select **Choose default program**.



3. Click on the arrow to the right of **Other Programs**, click on **Internet Explorer**, and then click the **OK** button.



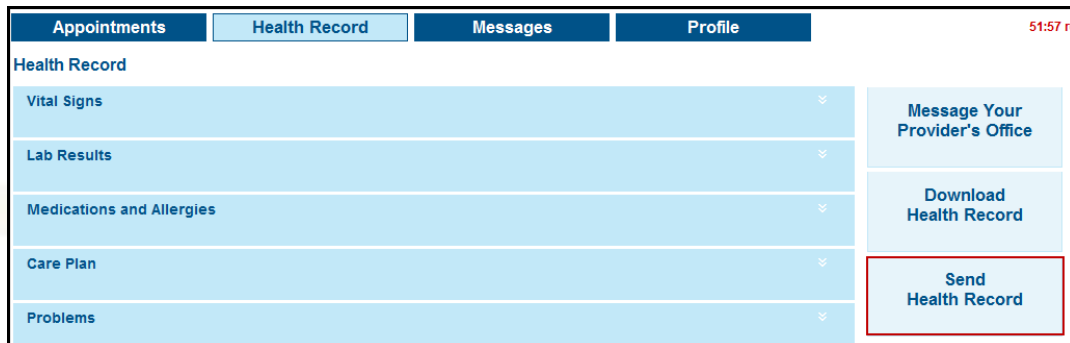
**Note:** The instructions above are for users with Windows 7 and Internet Explorer version 8. They may vary for users with other Operating Systems and Internet Explorer versions.


## 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 is 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.

To send a health record:

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



2. The Health Record (Ambulatory Summary) is attached automatically and cannot be removed. The attachment icon and label displays at the bottom of the page.
3. 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.
  - a. 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.
  - b. Or, type the full Secure Email address of the provider in the **To** field if the provider is not found in the search results.
4. The **Subject** line is automatically populated with the patient's name and cannot be changed.
5. Type a **Message** in the text area. This is optional.
6. Click the **Send Medical Record** button.

**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.



## Appointments Tab

The Appointments tab in the Patient Portal is organized into 2 sections: Care Team and Appointments.

### 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.

Appointments	Health Record	Messages	Profile	59:23
Appointments				
<div>Care Team</div> <div>David H Murphy, MD, Hyperion Circle</div>				Message Your Provider's Office
Appointments				
Appointments		Past Appointments		
Date/Time	Attendee	Date/Time	Attendee	
October 16, 2013 09:30 AM - 10:00 AM	David H. Murphy MD	November 16, 2011 09:00 AM - 09:15 AM	David H. Murphy MD	

### Appointments

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

Appointments			
Appointments		Past Appointments	
Date/Time	Attendee	Date/Time	Attendee
October 16, 2013 09:30 AM - 10:00 AM	David H. Murphy MD	November 16, 2011 09:00 AM - 09:15 AM	David H. Murphy MD
		December 19, 2011 03:30 PM - 03:45 PM	David H. Murphy MD
		January 9, 2012 09:00 AM - 09:15 AM	David H. Murphy MD
		February 14, 2012 10:30 AM - 10:45 AM	Douglas Ortiz MD

## Appointments Tab Button

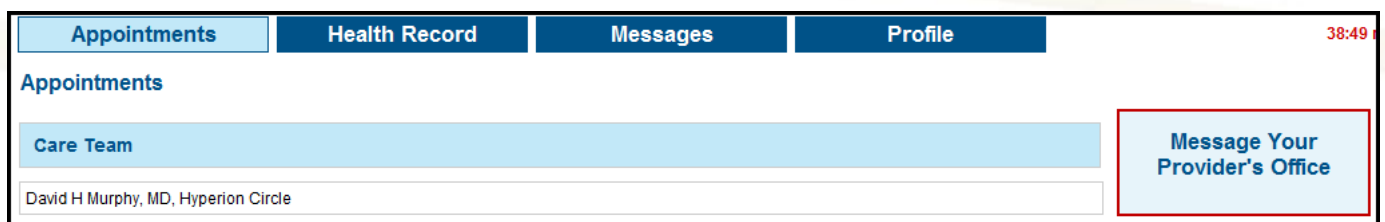
The Appointments tab has one action button: Message Your Provider's Office.

### 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.

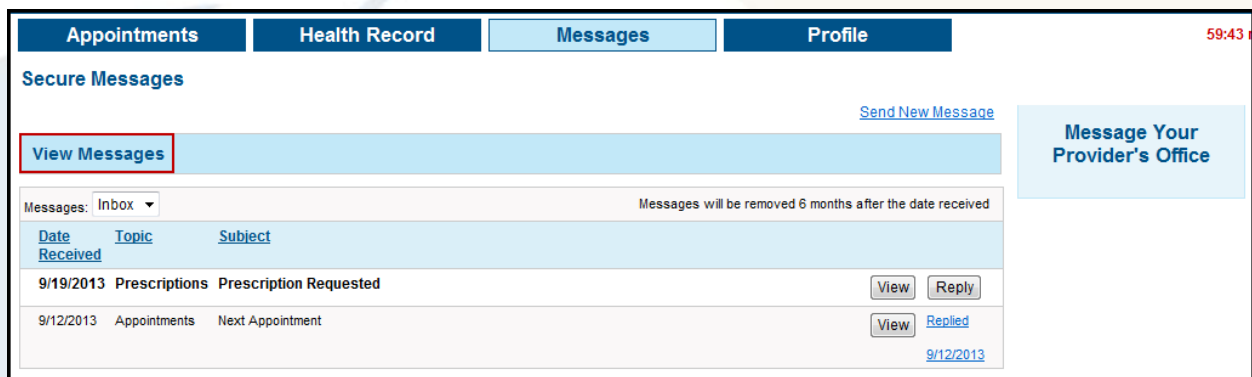
For more information on sending a secure message to the provider, refer to the [Sending Messages](#) section of this quick reference guide.

**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 Tab

The Messages tab in the Patient Portal contains 1 section: View Messages. This section allows a user to send a secure message to the provider (doctor's office) and view and reply to secure messages from the provider (doctor's office).



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

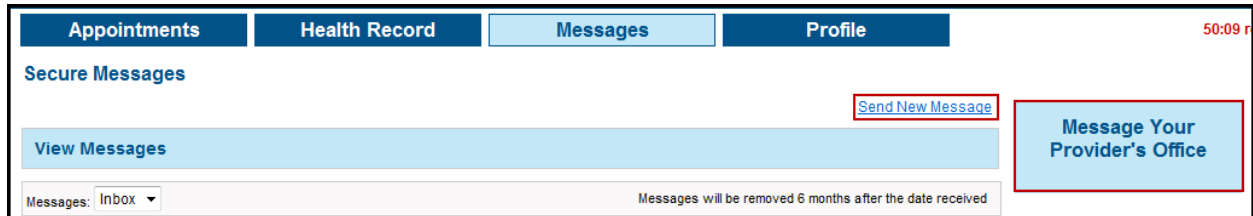




## Sending Messages

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

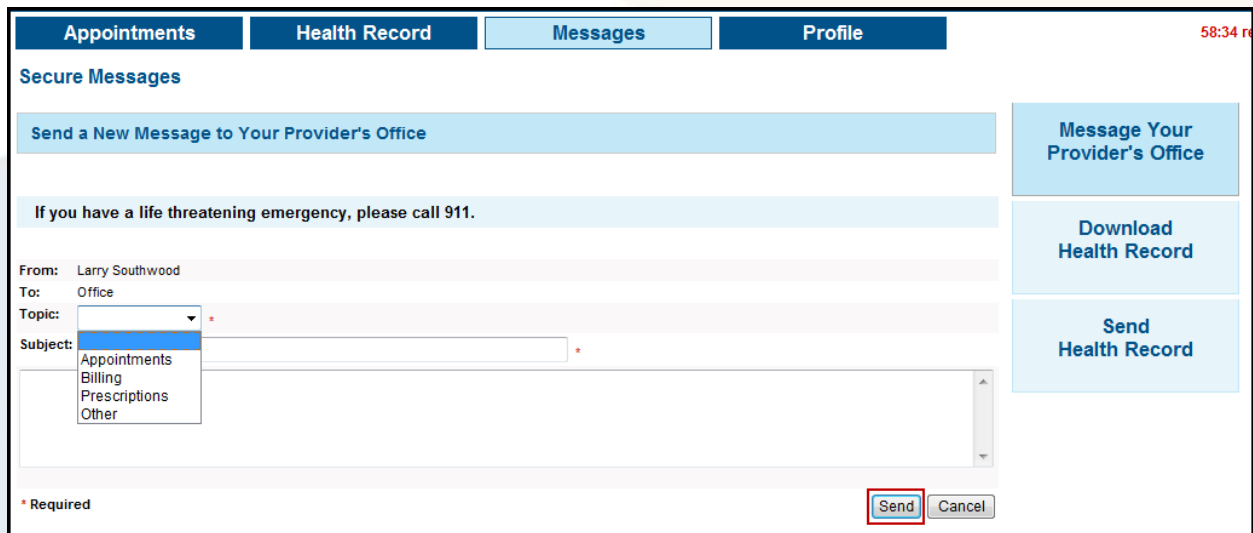
1. a. Click the **Send New Message** link.  
b. Or, click the **Message Your Provider's Office** button.



The screenshot shows the top navigation bar with 'Appointments', 'Health Record', 'Messages' (selected), and 'Profile'. Below the navigation bar, there's a 'Secure Messages' section. On the right side of this section, there are two buttons: 'Send New Message' (highlighted with a red box) and 'Message Your Provider's Office' (also highlighted with a red box). Below these buttons is a 'View Messages' button. At the bottom of the 'Secure Messages' section, there's a 'Messages: Inbox' dropdown and a note: 'Messages will be removed 6 months after the date received'.

2. The **From** and **To** fields are automatically populated and cannot be changed.
3. Select a **Topic** from the drop-down menu: Appointments, Billing, Prescriptions, or Other. This is a required field.
4. Type a **Subject** in the text box. This is a required field.
5. Type a message in the text area. This is a required field.
6. 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 quick reference guide for more information on these two buttons.



The screenshot shows the message composition form. At the top, there's a 'Send a New Message to Your Provider's Office' button. Below it, a message says 'If you have a life threatening emergency, please call 911.' The form fields are: 'From: Larry Southwood', 'To: Office', 'Topic: [dropdown menu]', and 'Subject: [text box]'. The dropdown menu for 'Topic' is open, showing options: 'Appointments', 'Billing', 'Prescriptions', and 'Other'. At the bottom right, there are 'Send' and 'Cancel' buttons. A red box highlights the 'Send' button. On the right side of the form, there are three buttons: 'Message Your Provider's Office', 'Download Health Record', and 'Send Health Record'.

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



The screenshot shows the 'Secure Messages' section with a red box around the text 'Message successfully sent'. To the right of this text is a 'Send New Message' link.

The message displays in **Sent** messages.

View Messages

Messages: **Sent**
Messages will be removed 6 months after the date received

<u>Date Received</u>	<u>Topic</u>	<u>Subject</u>	
10/2/2013	Prescriptions	Need Refill	<div>View</div> <div>Reply</div>

## Viewing Messages

Select **Inbox** (default) or **Sent** from 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.

Appointments

Health Record

Messages

Profile

Secure Messages

Send New Message

Message Your Provider's Office

View Messages

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

<u>Date Received</u>	<u>Topic</u>	<u>Subject</u>	
10/2/2013	Other	Flu Shots Now Available	<div>View</div> <div>Reply</div>
10/2/2013	Other	Flu Shots Now Available	<div>View</div> <div>Reply</div>
9/19/2013	Prescriptions	Prescription Requested	<div>View</div> <div>Reply</div>
9/12/2013	Appointments	Next Appointment	<div>View</div> <div>Replied</div>

9/12/2013

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.

View Messages

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

<u>Date Received</u>	<u>Topic</u>	<u>Subject</u>	
10/2/2013	Other	Flu Shots Now Available	<div>View</div> <div>Reply</div>
10/2/2013	Other	Flu Shots Now Available	<div>View</div> <div>Reply</div>
9/19/2013	Prescriptions	Prescription Requested	<div>View</div> <div>Reply</div>
9/12/2013	Appointments	Next Appointment	<div>View</div> <div>Replied</div>

9/12/2013

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

View Messages

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

<a href="#">Date Received</a>	<a href="#">Topic</a>	<a href="#">Subject</a>	
10/2/2013	Other	Flu Shots Now Available	<div>View</div> <div>Reply</div>

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.

View Messages

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

<a href="#">Date Received</a>	<a href="#">Topic</a>	<a href="#">Subject</a>	
10/4/2013	Other	Flu Shots Now Available	<div>Hide</div> <div>Reply</div>

Print Message

From: Office

To: Larry Southwood

Date: 10/4/2013 4:29 PM

Topic: Other

Subject: Flu Shots Now Available

That's fine. Please be aware our office is closed next Monday.

---

From: Larry Southwood

To: Office

Date: 10/2/2013 2:52 PM

Topic: Other

Subject: Flu Shots Now Available

Great! I will contact you soon to schedule an appointment.

---

From: Office

To: Larry Southwood

Date: 10/2/2013 11:13 AM

Topic: Other

Subject: Flu Shots Now Available

Flu shots are now available in our office. Please contact us to schedule a time to receive your shot. Thank you.

## 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 and hidden, or from a message that is open.

View Messages

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

Date Received	Topic	Subject	
10/4/2013	Prescriptions	Prescription Requested	<div>View</div> <div>Reply</div>
10/4/2013	Other	Flu Shots Now Available	<div>Hide</div> <div>Reply</div>

[Print Message](#)

From: Office

To: Larry Southwood

Date: 10/4/2013 4:36 PM

Topic: Other

Subject: Flu Shots Now Available

Flu shots are now available in our office. Please contact us to schedule a time to receive your shot. Thank you.

2. The **From**, **To**, and **Topic** fields are automatically populated and cannot be changed.
3. The **Subject** is also automatically populated, but can be changed.
4. Type a message in the text area.
5. Click the **Send** button to send the reply. Or, click the **Cancel** button to not send the reply.

Reply to Message

If you have a life threatening emergency, please call 911.

From: Larry Southwood

To: Office

Topic: Other \*

Subject:  \*

\* Required

Send

Cancel

From: Office

To: Larry Southwood

Date: 10/4/2013

Topic: Other

Subject: Flu Shots Now Available

Flu shots are now available in our office. Please contact us to schedule a time to receive your shot. Thank you.

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

### Secure Messages

Message successfully sent

[Send New Message](#)

#### View Messages

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

Date Received	Topic	Subject	
10/4/2013	Prescriptions	Prescription Requested	<span>View</span> <span>Reply</span>
10/4/2013	Other	Flu Shots Now Available	<span>View</span> <span>Replied 10/4/2013</span>

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

### View Messages

Messages: Sent ▼ Messages will be removed 6 months after the date received

Date Received	Topic	Subject	
10/4/2013	Other	Flu Shots Now Available	<span>View</span> <span>Reply</span>

**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.

### View Messages

Messages: Sent ▼ Messages will be removed 6 months after the date received

Date Received	Topic	Subject	
10/7/2013	Appointments	Next Appointment	<span>Hide</span> <span>Reply</span>

[Print Message](#)

**From:** Larry Southwood (Lyn L Southwood)  
**To:** Office  
**Date:** 10/7/2013 3:15 PM  
**Topic:** Appointments  
**Subject:** Next Appointment

Can you please tell me when the next appointment is scheduled for Larry Southwood? Thank you. Lyn Southwood

**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.

## 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 quick reference 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.



The screenshot shows the Patient Portal interface with the 'Profile' tab selected. The 'Demographics' section is highlighted. The patient information is as follows:

First Name:	Larry	Date of Birth:	8/12/1974
Middle Name:		Sex:	M
Last Name:	Southwood	Race:	White
Address 1:	123 Main Street	Ethnicity:	Not Hispanic or Latino
Address 2:	Apt. B	Preferred Language:	English
City, State Zip:	Anytown TN 99999		
Home Phone:	615-555-7989		
Email:	test@hotmail.com		

On the right side of the profile, there are four action buttons: 'Message Your Provider's Office' (highlighted with a red box), 'Demographics', 'Account Management', and 'Activity Log'.

## Demographics

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

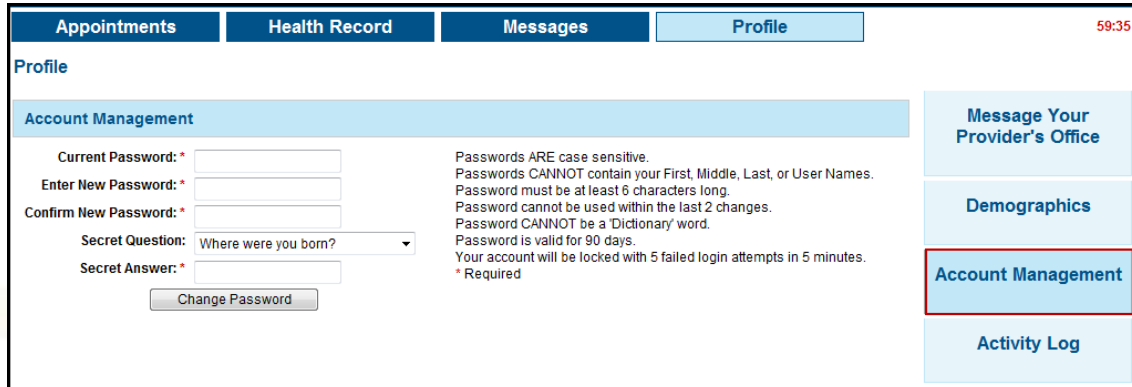


This screenshot is identical to the one above, showing the Patient Portal Profile tab with the 'Demographics' section highlighted. The patient information and action buttons are the same. The 'Demographics' button on the right is highlighted with a red box.

## 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 quick reference guide for more information about changing the password.



**Profile**

**Account Management**

Current Password: \*

Enter New Password: \*

Confirm New Password: \*

Secret Question: Where were you born?

Secret Answer: \*

Message Your Provider's Office

Demographics

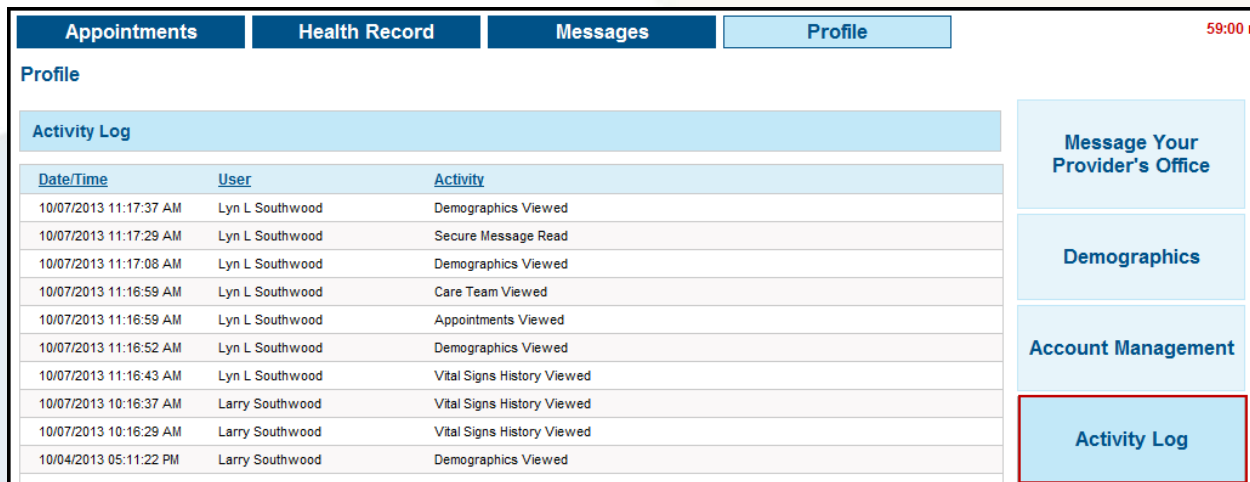
**Account Management**

Activity Log

59:35 remaining in session

## 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 **User** who was logged in, and the type of **Activity** that occurred.



**Profile**

**Activity Log**

Date/Time	User	Activity
10/07/2013 11:17:37 AM	Lyn L Southwood	Demographics Viewed
10/07/2013 11:17:29 AM	Lyn L Southwood	Secure Message Read
10/07/2013 11:17:08 AM	Lyn L Southwood	Demographics Viewed
10/07/2013 11:16:59 AM	Lyn L Southwood	Care Team Viewed
10/07/2013 11:16:59 AM	Lyn L Southwood	Appointments Viewed
10/07/2013 11:16:52 AM	Lyn L Southwood	Demographics Viewed
10/07/2013 11:16:43 AM	Lyn L Southwood	Vital Signs History Viewed
10/07/2013 10:16:37 AM	Larry Southwood	Vital Signs History Viewed
10/07/2013 10:16:29 AM	Larry Southwood	Vital Signs History Viewed
10/04/2013 05:11:22 PM	Larry Southwood	Demographics Viewed
10/04/2013 04:48:48 PM	Larry Southwood	Secure Message Sent

Message Your Provider's Office

Demographics

Account Management

**Activity Log**

59:00 remaining in session

## Logging Out of the Patient Portal

Click the **Logout** link at the top right of the Patient Portal header to exit the Patient Portal.



ACUMEN<sup>®</sup> PHYSICIAN SOLUTIONS

Larry Southwood

[Change Password](#) • [Logout](#)

Appointments Health Record Messages **Profile**

59:20 remaining in session



## Requesting a New Password

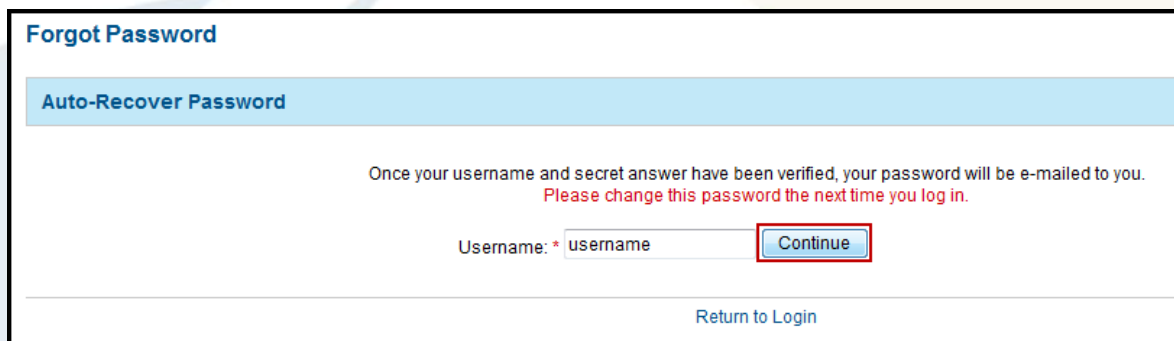
A user can request a new password if the current password has been forgotten.

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:

[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.

**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.

## 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/s7PbZzeihRXe>. The password is AcumenPatientPortal.