

# Patient Portal

Your healthcare right at your fingertips.



## AdvancedMD



Schedule appointments



View medical information



Request prescription renewals



Message your doctor



Pay your bill



Submit forms

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# Accessing Patient Portal

When the patient first enters the patient portal, they must register & activate their account.

Patients can register for the portal one of two ways

- Self-registration
- Register with a Patient Portal Invite

# 1.1 SELF-REGISTRATION

Patients do not need an email invite to create a patient portal account.

Patients can complete the following steps for self-registration:

- **Navigate to the Patient Portal login page** and click Register to begin self-registration for the portal.
- After filling out the required information on the screen and clicking Register, the patient will receive a Patient Portal Account Notification email with a link to complete their patient portal account registration.

## REGISTRATION SCREEN

Patients should follow the instructions below in the Register with a Patient Portal Invite section to complete their Patient Portal account registration.

The screenshot displays the 'Patient Portal' registration interface. At the top, the 'Patient Portal' logo is centered, and the 'AdvancedMD' logo is on the right. The main heading is 'Register a New Account'. The form includes three input fields: 'First Name', 'Last Name', and 'Email'. Below these is a checkbox labeled 'I have read and agreed to the Terms & Conditions'. A blue 'Register' button is positioned below the checkbox. A link 'Already have an account?' is followed by a green 'Sign In' button. The background image shows a man and a woman sitting on a couch, looking at a laptop. The bottom of the screen features a blue navigation bar with 'Address & Directions' on the left and 'Need Assistance? Call (655) 734-5428' on the right.



### IMPORTANT NOTES:

To register, the patient name and email entered on the Register a New Account screen must match the name and email on the Patient **Records**.

## 1.2 REGISTER WITH A PORTAL INVITE

As part of the intake process, a portal invite email is sent to the email address provided by the patient. The email contains a link that takes the patient directly to the Complete Account Registration screen.

**Complete Account Registration**

Or connect with:

Facebook

Google

Already have an account?

Log In

OR

Register

Address & Directions

Need assistance? Call (801) 984-6108

The following information must be entered to register and activate a portal account.

### New Password

Passwords must contain a minimum of eight characters and include one upper case letter, one lowercase letter, one number, and one special character.

### he following identifier

- Birth Date – MM/DD/YYYY

### Read and agree to the Terms & Conditions

### Click Register

Once the account is registered and activated, account holders are automatically logged in to the Patient Portal.

## 1.3 FORGOT PASSWORD

The following instructions explain the steps the account holder will take to reset their patient portal account password.

### Go to the Patient Portal log on screen.

1. Click Forgot Password.
2. Enter your email address.
3. Click Send New Password.
4. Click the link included in the Patient Portal Account Notification email.

### Patient Account Home Screen

The screenshot displays the Patient Account Home Screen with the following elements:

- Navigation Tabs:** Profile (selected), Appointments, Messages, Bills, Prescriptions, Forms, Records.
- Secondary Navigation:** Home, Profile Settings, Messaging Preferences, Activity History, Terms of Service, Log Out.
- Section Header:** Access Your Account Information
- Account Information Card:**
  - Profile:** ADAMSON, FAITH, 2/26/1986, 10203 N LONG STREET HOUSTON, TX 77057, 555-1982.
  - Balance:** \$20.30
  - Next Appointment:** No upcoming appointments
  - Last Appointment:** 01/22/2015 01:32 PM
  - Reminders:** Due, No Health Watcher Items Found
- Service Tiles:**
  - Ask a Question:** Send a message to the office staff for medical or billing questions.
  - Request Appointments:** Make an appointment with one of our providers for a sick visit or physical.
  - Request Refills:** Request a medication refill and view current medications and dosages.
  - Pay My Bill:** Pay your account balance online using your credit or debit card.
  - View Records:** View or download your medical records.
  - Patient Forms:** Access your forms and update (2 new forms).

A hand is shown hovering over a tablet device. The background is dark and blurred, showing a desk with a pen and a mouse. A solid blue vertical bar is on the left side of the image. The text '2. Messaging' is overlaid in white at the bottom.

## 2. Messaging




## 2.1 UPDATE MESSAGING PREFERENCES

Patient Portal account holders can update Messaging Preferences in the Patient Portal for the responsible party and patients.

Go to **Profile > Messaging Preferences**.

If the responsible party account holder has no patients tied to their account, they can change the messaging preferences for themselves for all notification types.

If the responsible party account holder has patients tied to their account, they can make changes for all patients and themselves. In addition to changing preferences for patients, they can choose to have Appointment Reminder notifications sent to the responsible party or the patient.

	 Email	 Text	 Voice
Appointment Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Patient Messaging	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Patient Surveys	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	

Save



## 2.2 ASK A QUESTION

Patients or account holders can click the Ask a Question button to send an email message to the practice or a specific provider.

To ask a question go to **Messages > Ask a Question**.

The screenshot shows the patient portal interface. At the top, there is a navigation bar with the SUGI Psychiatry & Wellness logo and several menu items: Profile, Appointments, Messages (highlighted), Bills, Prescriptions, Forms, and Records. Below this is a sub-navigation bar with 'My Messages' and 'Ask a Question' (selected), and a 'Log Out' button. The main content area is titled 'Inbox' and includes a 'Viewing:' section with a dropdown menu showing 'TEST,DAISY 02/14/2002' and a date range dropdown set to 'Last 30 days'. A 'Filter' button is also present. Below this is a table with columns for 'Date', 'Patient', 'Subject', 'Sender', and 'Actions'. The table currently shows 'No messages available'. In the 'Actions' column, there is a blue button labeled 'Ask a Question' which is circled in red and has a hand cursor pointing to it. Below the table is another blue button labeled 'Sent Messages'.

- Patients can send a message directly to a provider by choosing "Ask Physician/Provider Directly". (**PREFERRED**)
- If you have questions about scheduling, appointments, or patient paperwork please choose the "General Q&A" option to send a message to our front office staff.

The screenshot shows the 'Ask a Medical or Billing Question' form. At the top, there is a navigation bar with the SUGI Psychiatry & Wellness logo and several menu items: Profile, Appointments, Messages (highlighted), Bills, Prescriptions, Forms, and Records. Below this is a sub-navigation bar with 'My Messages' and 'Ask a Question' (selected), and a 'Log Out' button. The main content area is titled 'Ask a Medical or Billing Question' and includes a yellow warning box that reads: 'This message may not be immediately seen or responded to. For immediate assistance, call the office directly at (775) 507-2606. If this is an emergency call 911.' Below this is a 'Subject' dropdown menu with the following options: 'General Q&A', 'Ask Physician/Provider Directly' (selected), 'Billing & Payments', 'General Q&A', and 'Patient Health Information'. To the right of the dropdown menu are two blue buttons: 'Inbox (0)' and 'Sent Messages'. Below the subject dropdown is a 'Message' text area.



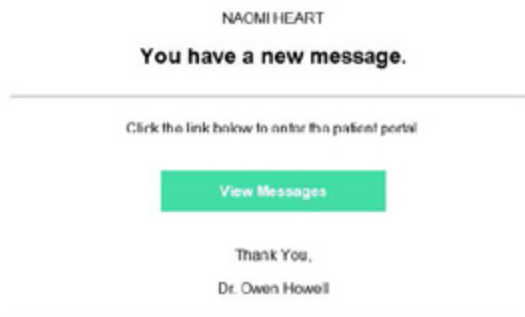
### NOTES:

**Please message your provider directly** when requesting prescription refills, or if you have any specific questions related to medications, dosing, side effects, etc. Office staff is unable to address these types of concerns over the phone.

## 2.3 RECEIVE MESSAGES IN THE PORTAL

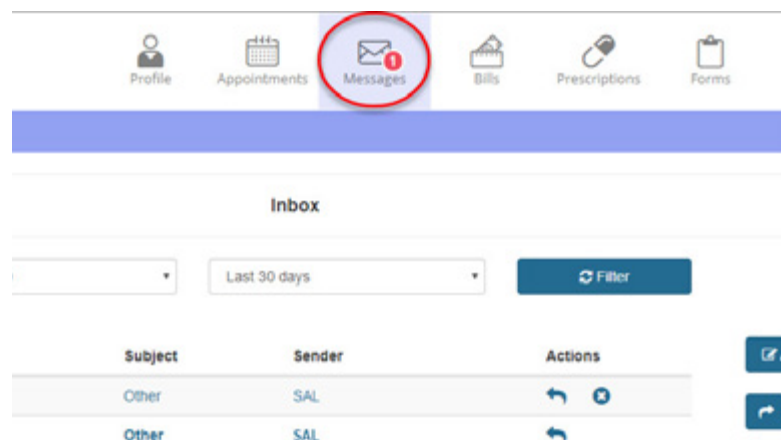
When a message is sent to a patient or account holder they receive an email notification.

From: Owen Howell, M.D. <owen@ad.vancouver.ca>  
Date: Fri, Aug 25, 2017 at 11:11 AM  
Subject: You have a new message in the patient portal  
To: Naomi Heart <NHeart@gmail.com>



When the patient or account holder opens the patient portal, a number displays next to the **Messaging** menu item to indicate the number of messages received.

1. The patient or account holder clicks the Messaging icon. A new message is indicated by a red dot next to the date. Once a message has been opened the red dot no longer displays.
2. The patient or account holder clicks on a message.
3. The patient or account holder responds to message as required.



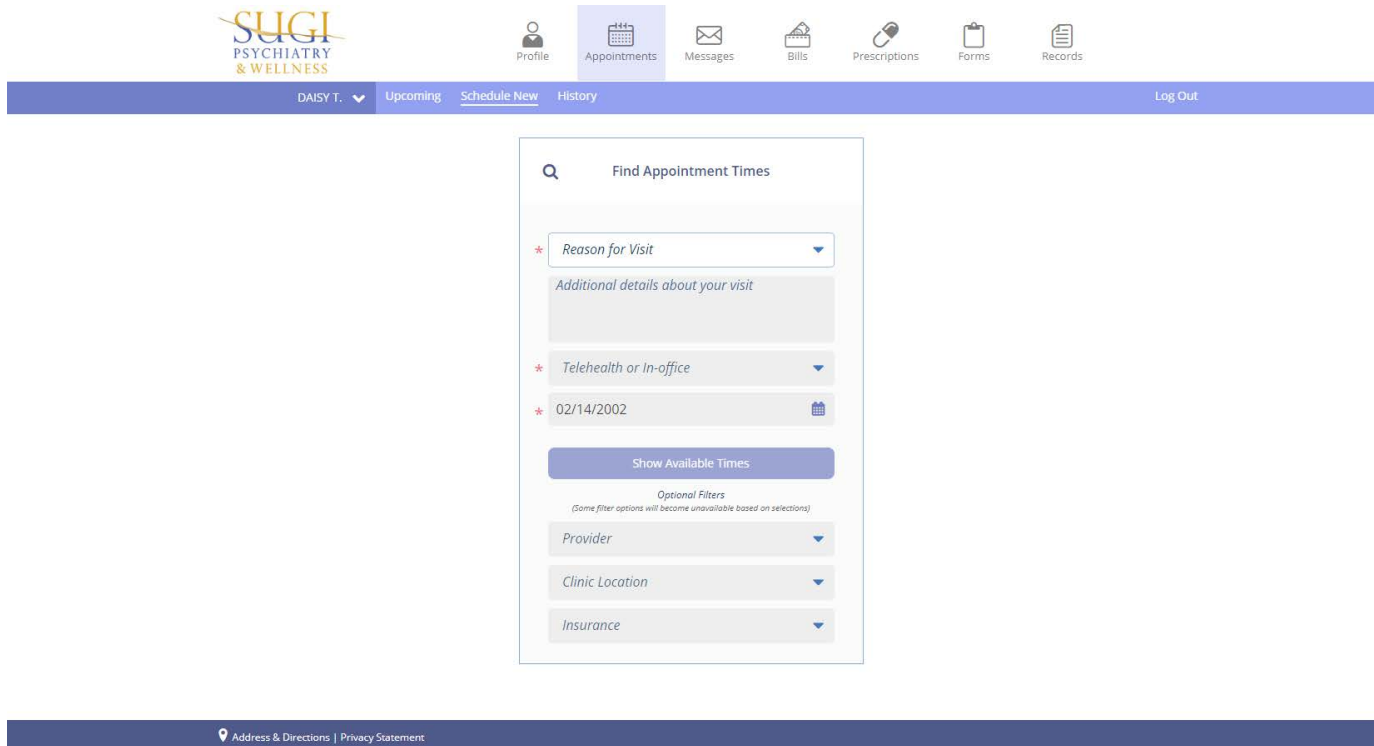
A person wearing a white lab coat is shown from the chest down, sitting at a desk. Their right hand is on a white computer mouse, and their left hand is on a keyboard. The background is slightly blurred, showing a green plant and a white cup. The overall scene is dimly lit, with a dark overlay on the right side of the image.

# 3. Appointments

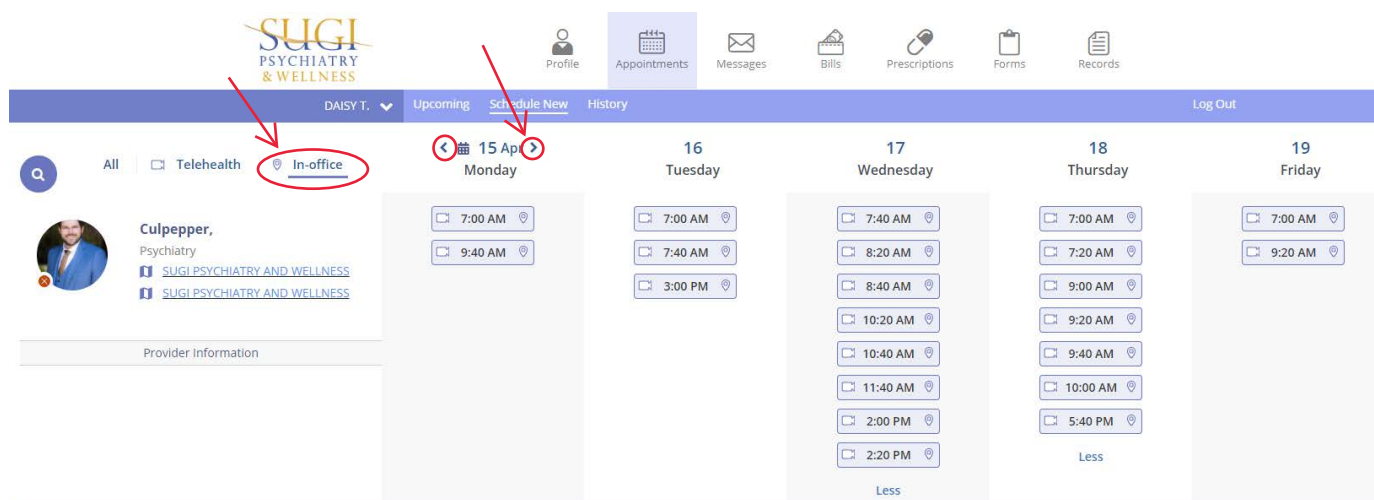
# 3.1 ONLINE SCHEDULING

Established patients and account holders can schedule their follow up appointments directly from the patient portal by going to **Appointments > Schedule New**.

Select the reason for the appointment (*follow up*) fill in any details you wish to include for the provider in the text box, select the location (*telehealth or in-office*), and click Show Available Times.



Use the arrows to navigate to the first available appointment time, and choose an appointment date and time from the options listed. Be sure that "In-Office" or "Telehealth" is underlined, matching the option you prefer.



# 3.1 ONLINE SCHEDULING, CONTINUED

If all the appointment details look correct, click Confirm Appointment, again making sure either "Telehealth" or "In-Office" is selected to match the appointment type preferred.

**Appointment Details**

You are scheduling an appointment with

**Culpepper,**  
Psychiatry  
at SUGI PSYCHIATRY AND WELLNESS  
on  
**Monday, April 15, 2024 at 7:00 AM**  
for  
Follow Up Visit

**10395 Double R Blvd**  
10395 Double R Blvd, Reno, NV 89521  
Directions  
View larger map

Back

Confirm In-office Appt

## 3.2 ACCESS TELEMEDICINE APPOINTMENTS

Patients can access their telemedicine appointments from the Patient Portal, if your practice has Online Scheduling and Telemedicine.

Patients must be logged in to their portal account to access their telemedicine appointment.

1. Go to **Appointments > Upcoming**
2. Click **Start Telemedicine Call**

Patients will be able to join the call according to the settings in the Telemedicine Settings screen.

CONSULTATION, for HEART, RICHARD

 Start Telemedicine Call

DR. SAM BLACK



**IMPORTANT NOTES:**

*The Start Telemedicine Call button will be disabled after the time of the appointment has passed. Patients who are late to connect their telemedicine appointment will be unable to use the Patient Portal to access their telemedicine appointment. They will need to access their appointment from the link in the telemedicine confirmation email.*



# 4. Clinical

# 4.1 REQUEST PRESCRIPTION REFILLS

Account holders can request a refill for either a Current or Historical prescription using the patient portal.

**Request a Medication Refill**

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Viewing:

Date	Patient	Medication	Quantity	Destination	Provider	Action/Status
No medications found						



## 4.5 SUBMIT PATIENT FORMS

Patients can access, fill out, and submit patient forms prior to their appointment.

1. The patient, or responsible party, logs in to the portal. The Patient Forms icon displays with the number of forms to be completed.
2. The patient, or responsible party, clicks the Patient Forms icon on the home page. The Patient Name, Appointment Date, Form Names, and Start button displays.
3. The patient, or responsible party, clicks the Start button for a form. The form displays.
4. The patient, or responsible party, completes the patient check-in forms and takes the following actions based on the type of form they are completing:

### Cancel

Closes the form screen

### Ask a Question

Opens the Messaging screen in the Patient Portal

### Save & Close

Saves the patient's work and closes the form screen. Form status changes to Saved.

### Finish & Submit

Closes the form screen and sends the form back to your office for review. Form status changes to Submitted.

### Decline (Consent Form)

Closes the form screen and sends the form back to your office for review with no signature. Form status changes to Submitted in the portal Patient Forms grid, and the Status in the Patient Forms screen Review Forms tab changes to Declined to Sign.

The screenshot shows a web interface for a consent form. At the top right, there are navigation links: Home, Messaging, Account, Profile, and Sign Out. Below these is a header area with the word 'Consent' on the left and four buttons: 'Cancel', 'Decline', 'Save and Close', and 'Finish and Submit'. The main title of the form is 'Consent to Obtain Patient Medication History'. The text of the form explains that medication history is a list of prescriptions from various sources, stored in the practice's electronic medical record system, and is important for treatment and avoiding drug interactions. It states that the information is 100% accurate but may not include over-the-counter drugs or those purchased without insurance. A signature line is present with the text 'I give my permission to allow my healthcare provider to obtain my medication history from my pharmacy, my health plans, and my other healthcare providers.' Below this is a signature box containing the text 'Sign here' in a cursive font. A 'Clear' button is located below the signature box. At the bottom, there is a field for 'Patient Name: Marie Bamberg' and a disclaimer: 'By signing this consent form you are giving your healthcare provider permission to collect and share your pharmacy and your health insurer information about your prescriptions that have been filled at any pharmacy or covered by any health insurance plan. This includes prescription medicines to treat AIDS/HIV and medicines used to treat mental health issues such as depression.'