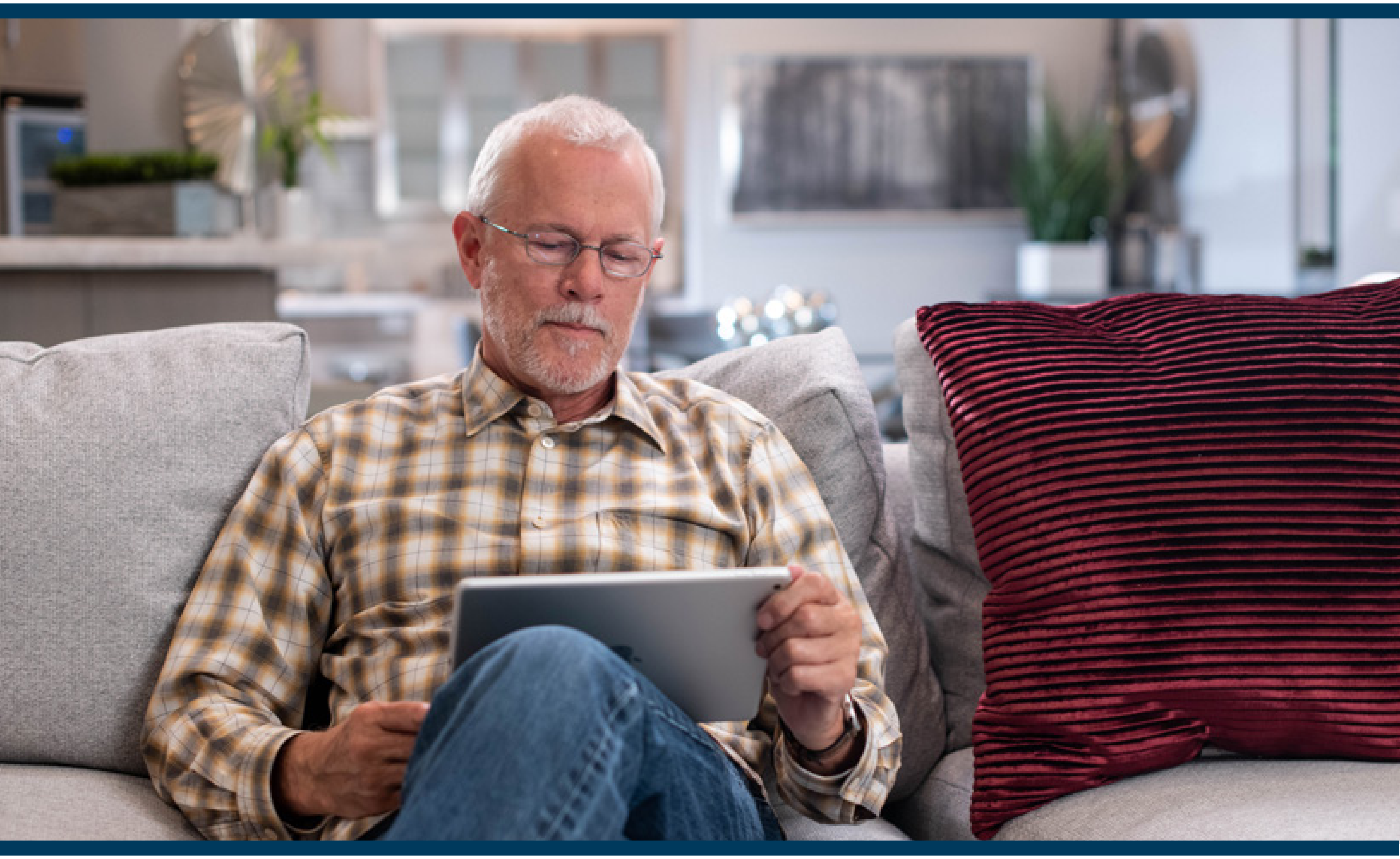
SUGI PSYCHIATRY & WELLNESS

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

CONTENTS

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

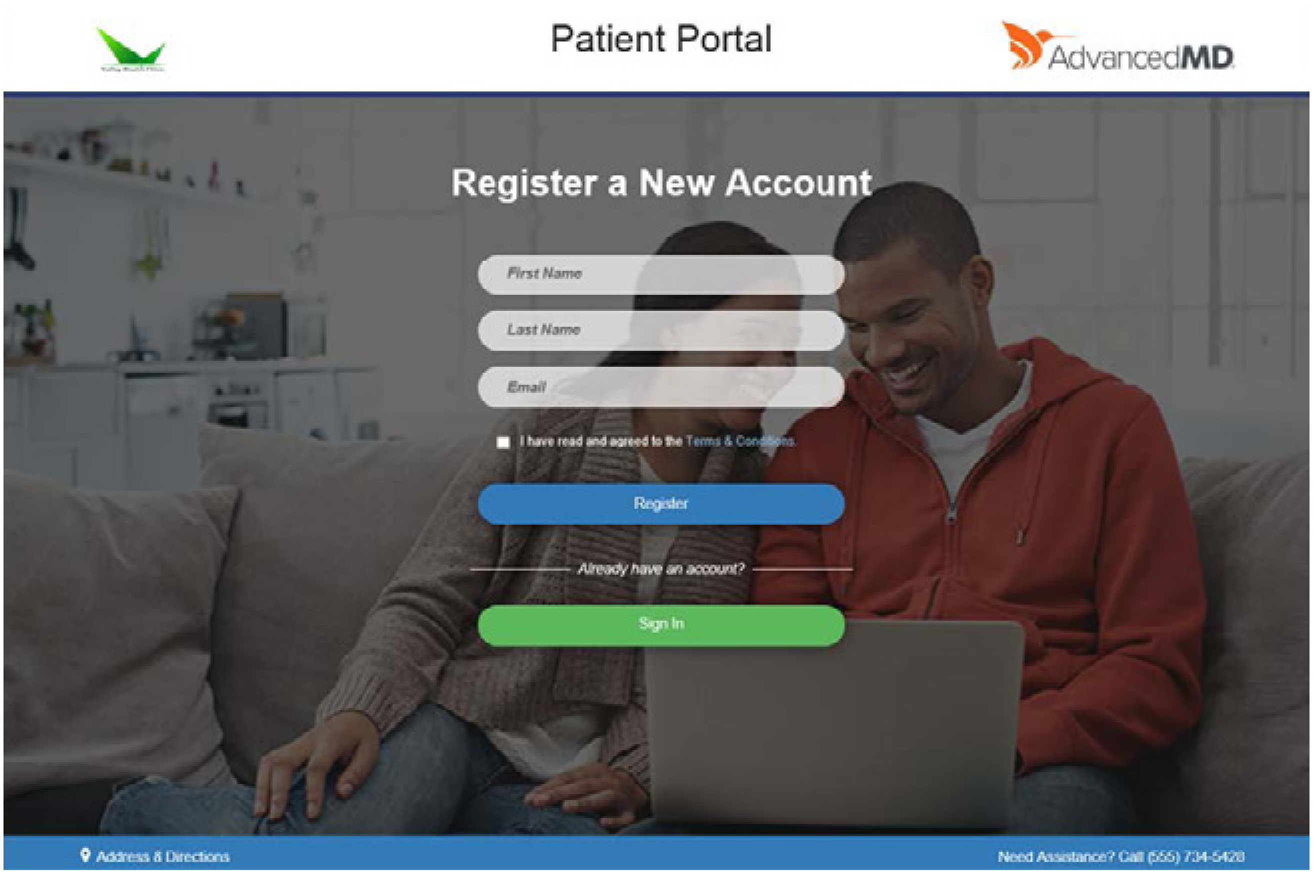
Patients do not need an email invite to create a patient portal account.

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 atient ortal account registration.

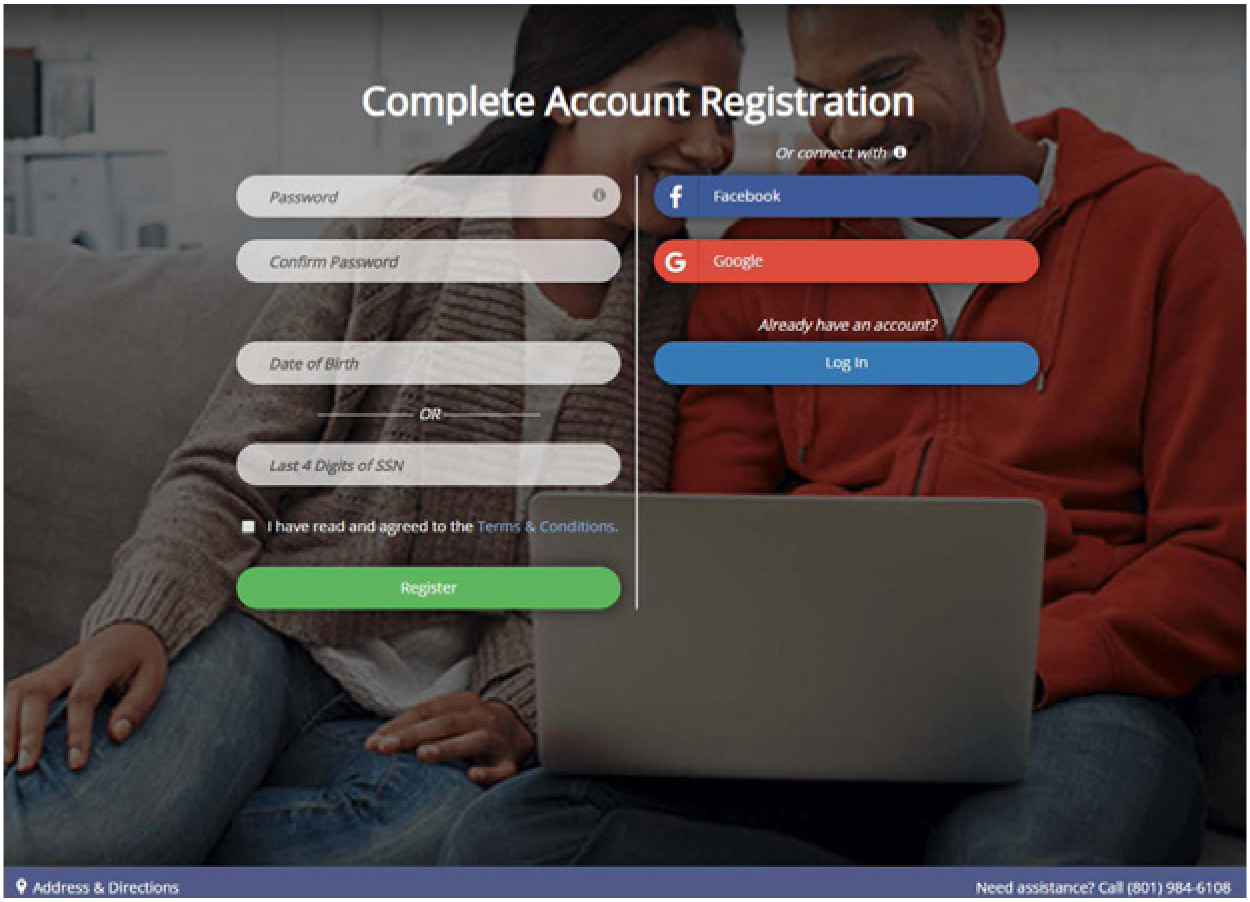
REGISTRATION SCREEN
Patients should follow the instructions below in the Register with a Patient Portal Invite section to complete their Patient Portal account registration.



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.



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.

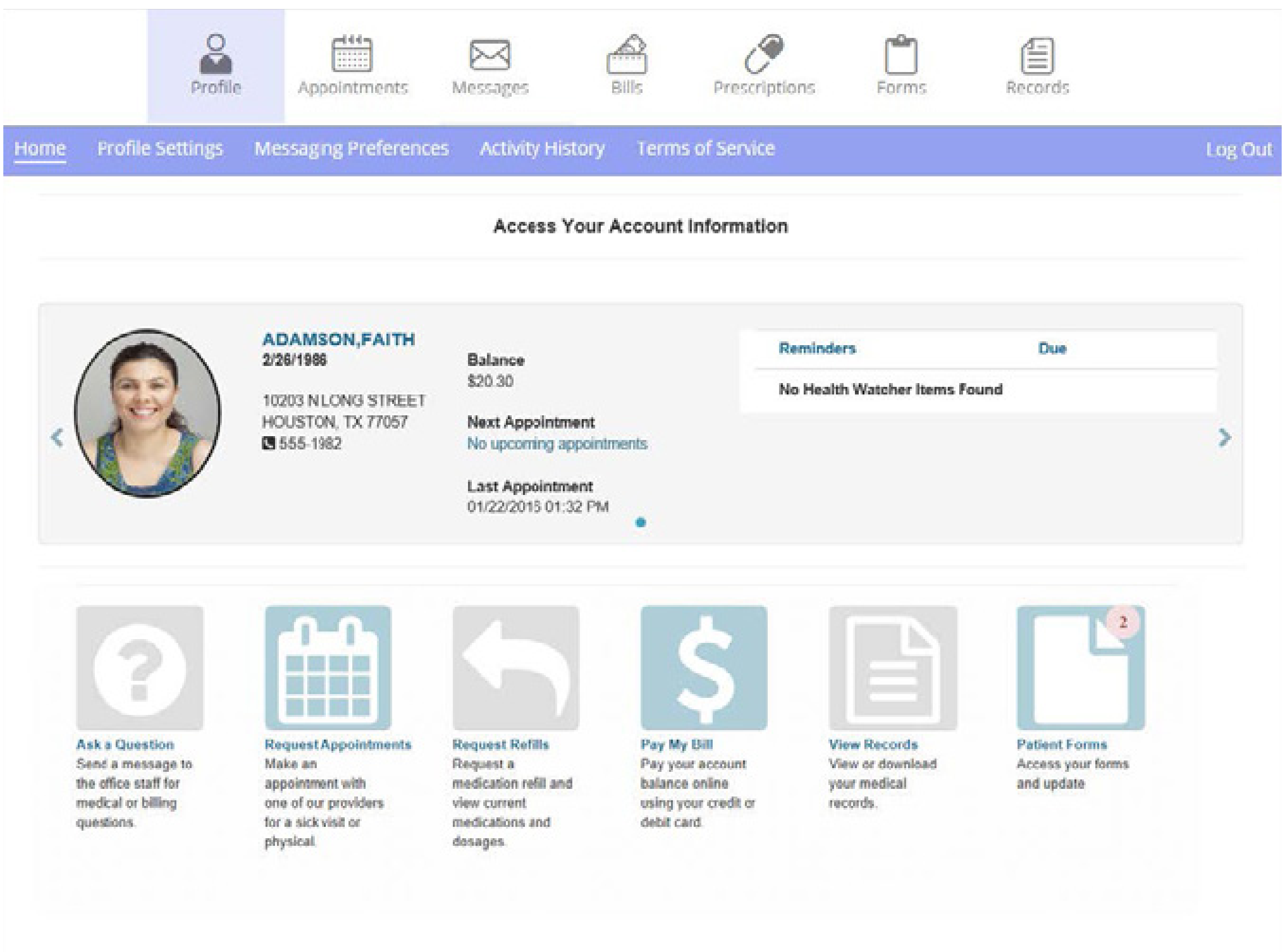
1.3 FORGOT PASSWORD

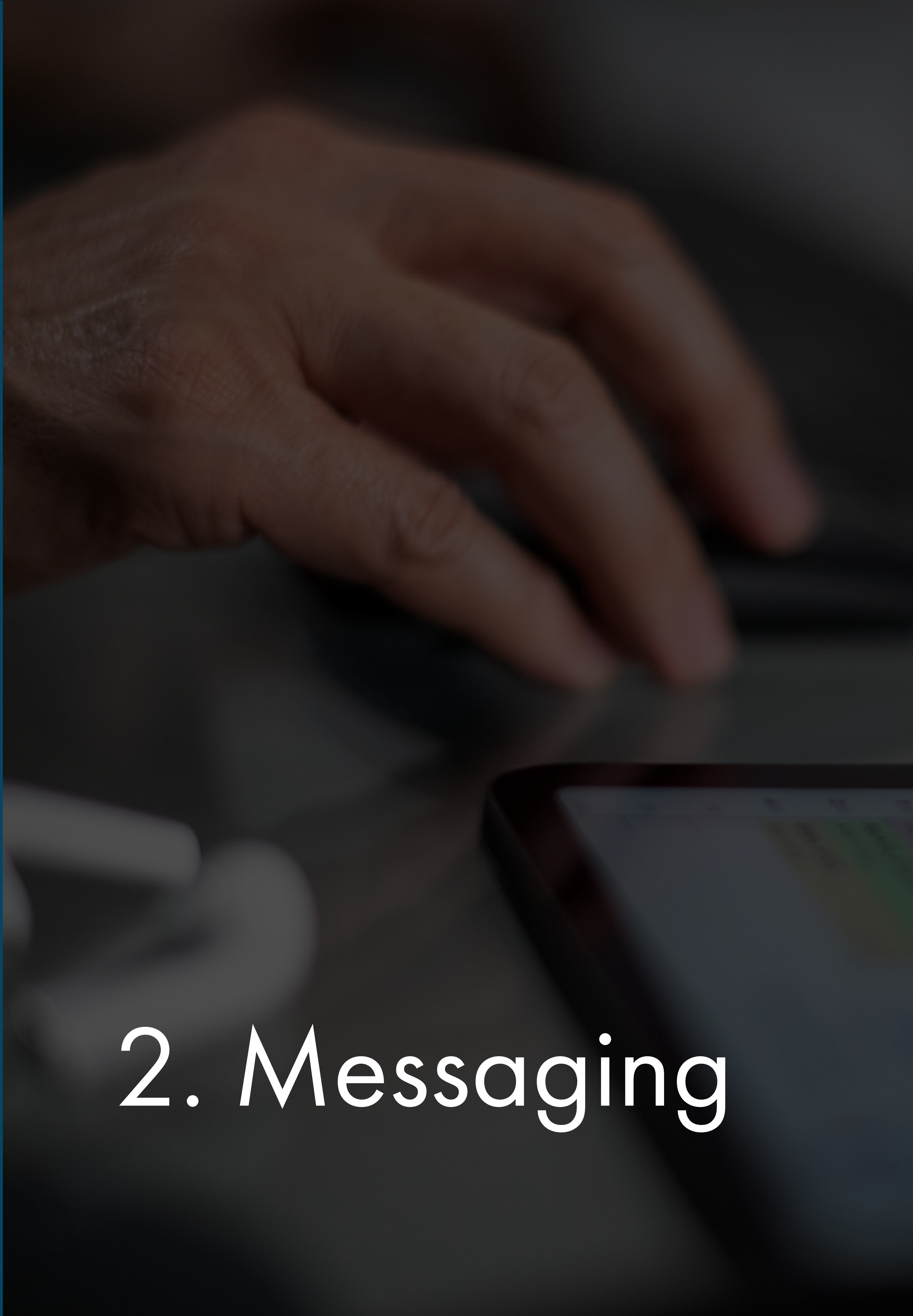
The following instructions explain the steps the account holder will take to reset their patient portal account password.

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





2. Messaging

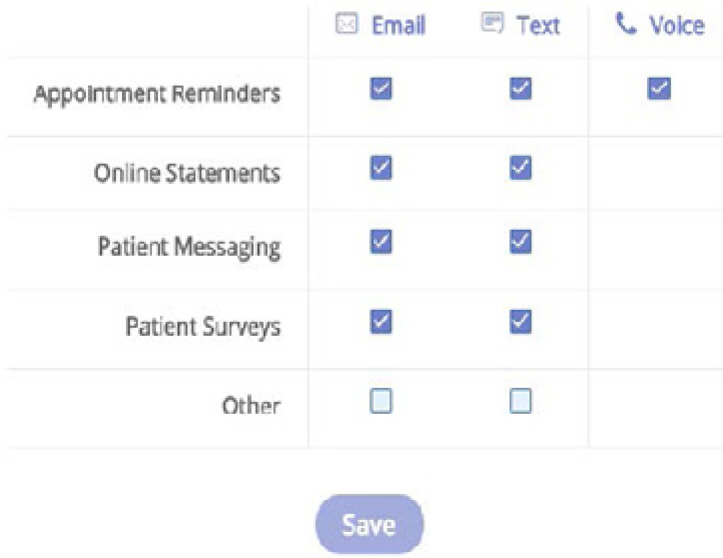
2.1 UPDATE MESSAGING PREFERENCES

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.

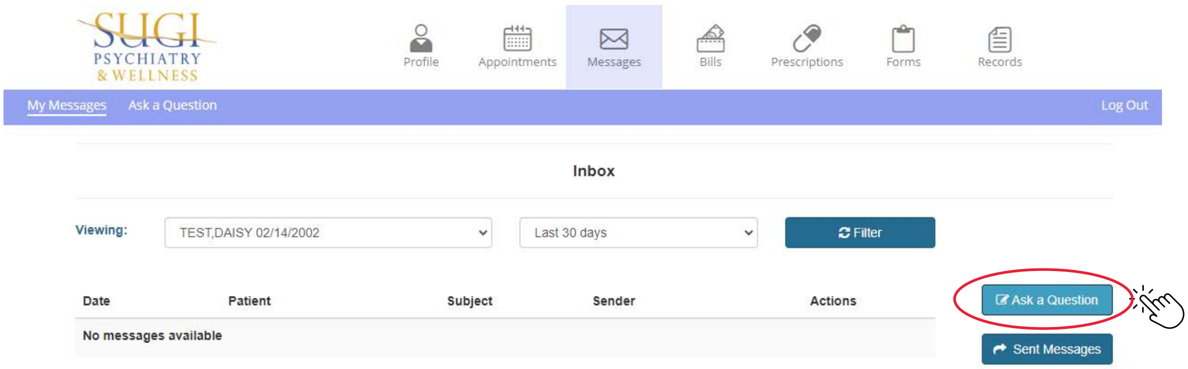
If the responsible party account holder has patients tied to their account, they can make changes for all patients and themselves. In addition to changing preferences for patients, they can choose to have Appointment Reminder notifications sent to the responsible party or the patient.



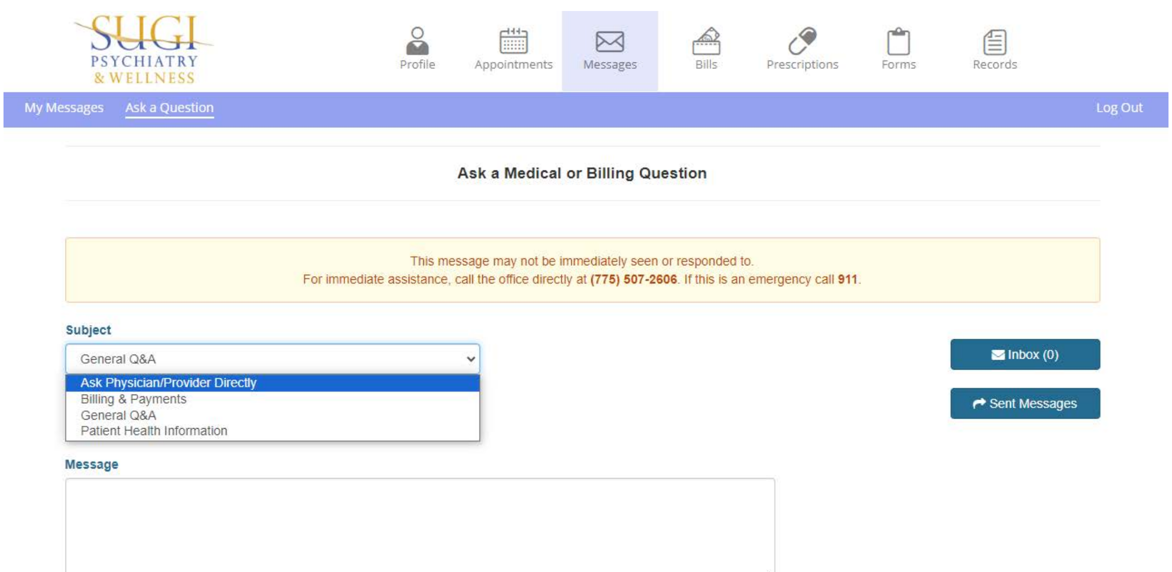
2.2 ASK A QUESTION

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**.



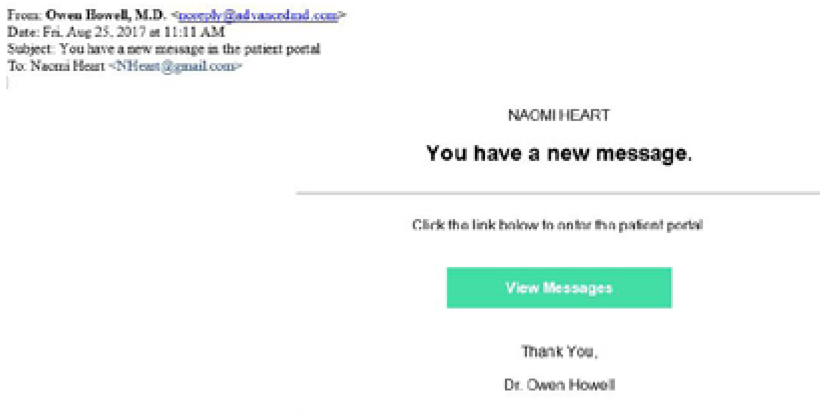
- Patients can send a message directly to a provider by choosing "Ask Physician/Provider Directly". ***(PREFERED)***
- If you have questions about scheduling, appointments, or patient paperwork please choose the "General Q&A" option to send a message to our front office staff.



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.*

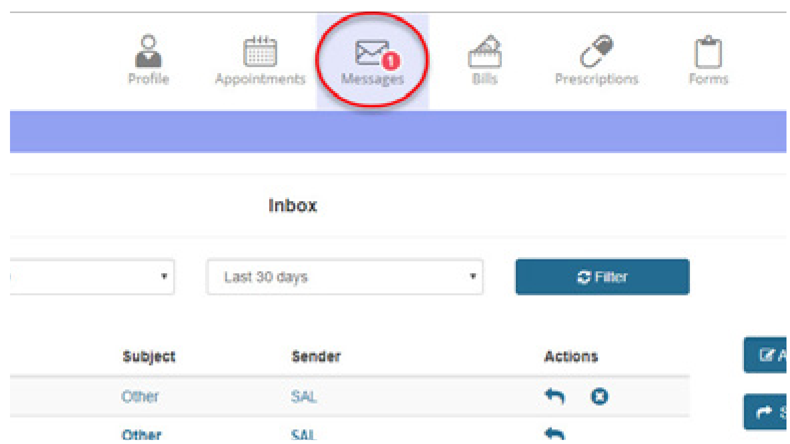
2.3 RECEIVE MESSAGES IN THE PORTAL

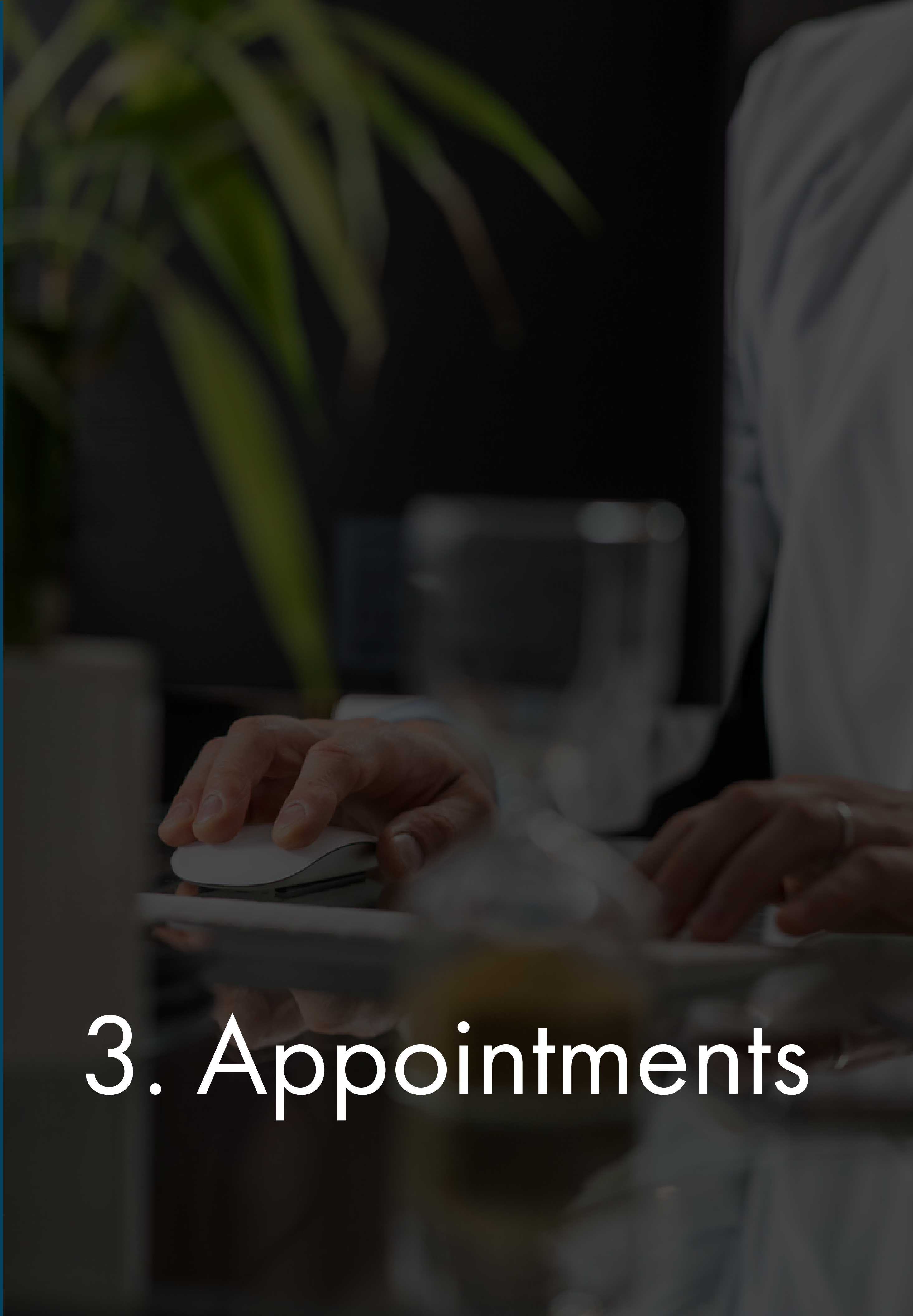
When a message **is sent** to a patient or account holder they receive an email notification.



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.



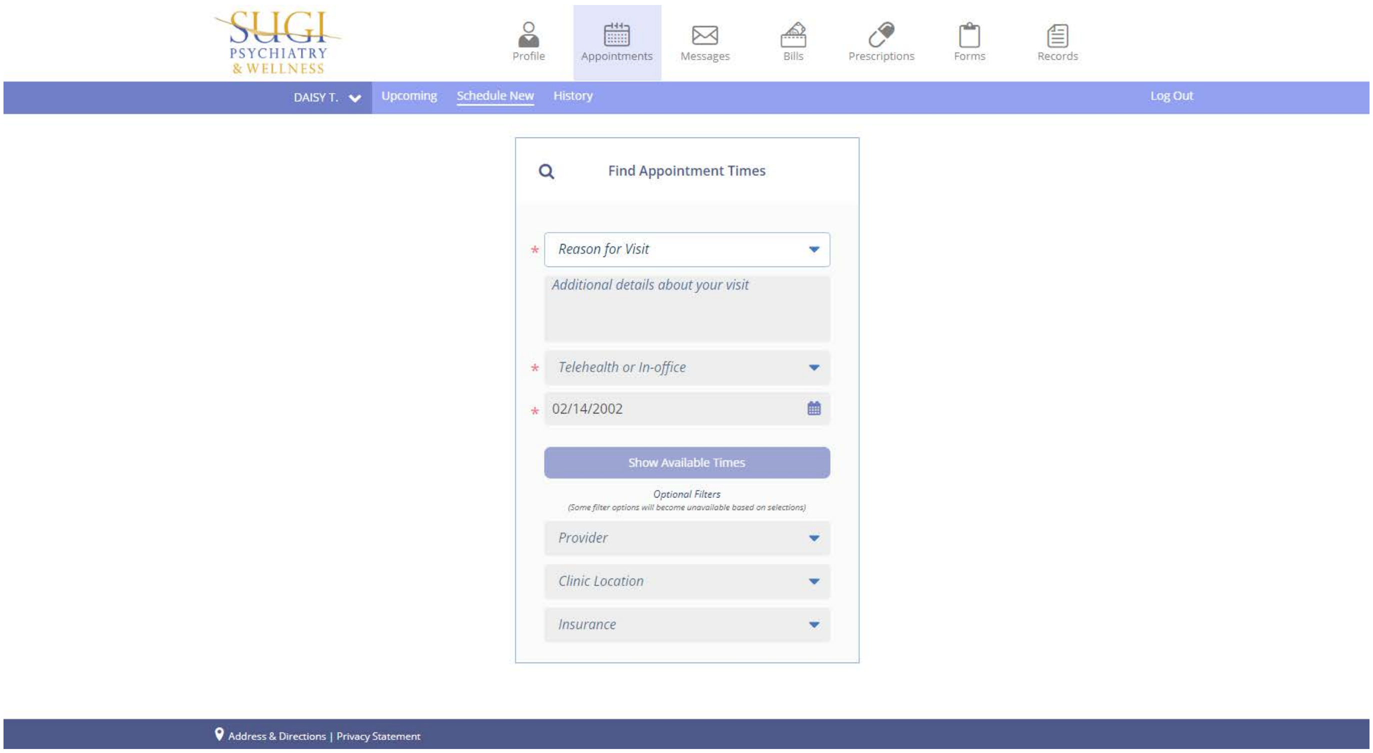


3. Appointments

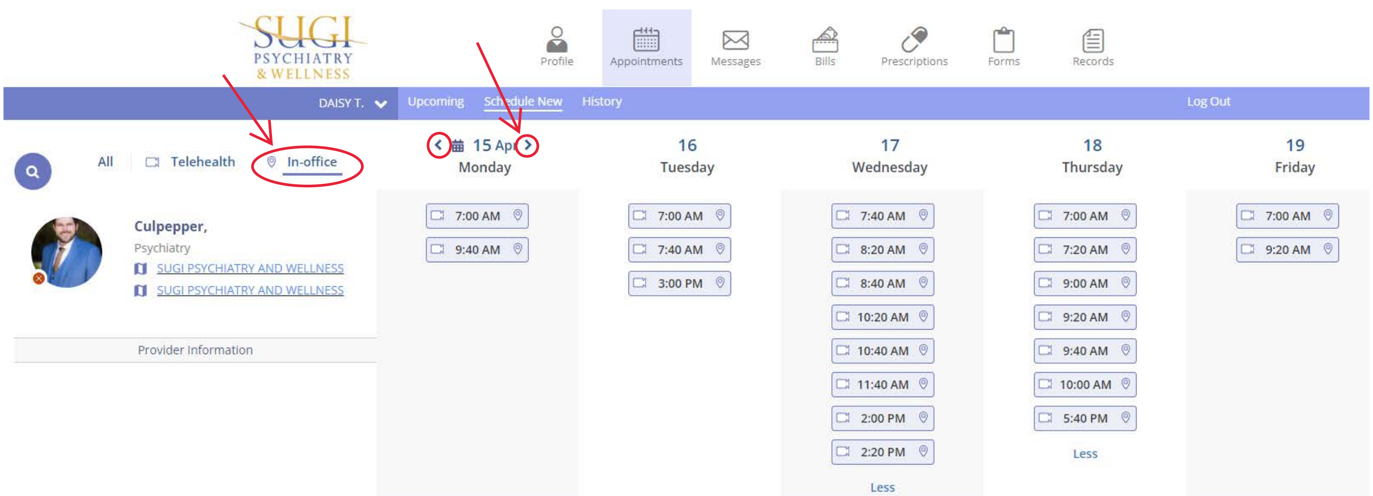
3.1 ONLINE SCHEDULING

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.

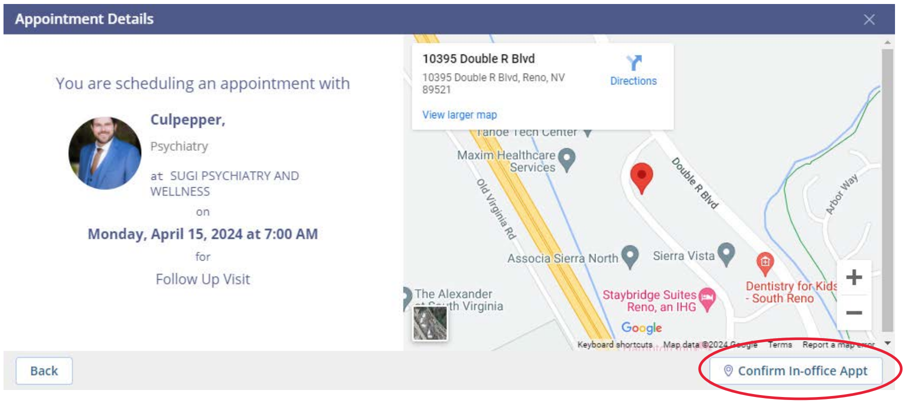


Use the arrows to navigate to the first available appointment time, and choose an appointment date and time from the options listed. Be sure that "In-Office" or "Telehealth" is underlined, matching the option you prefer.



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.



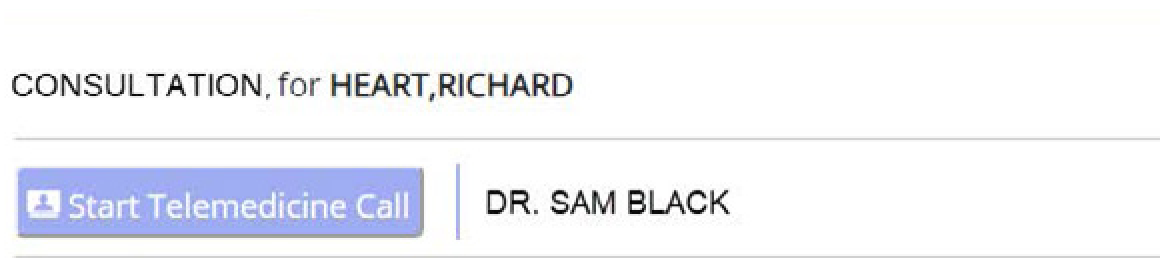
3.2 ACCESS TELEMEDICINE APPOINTMENTS

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

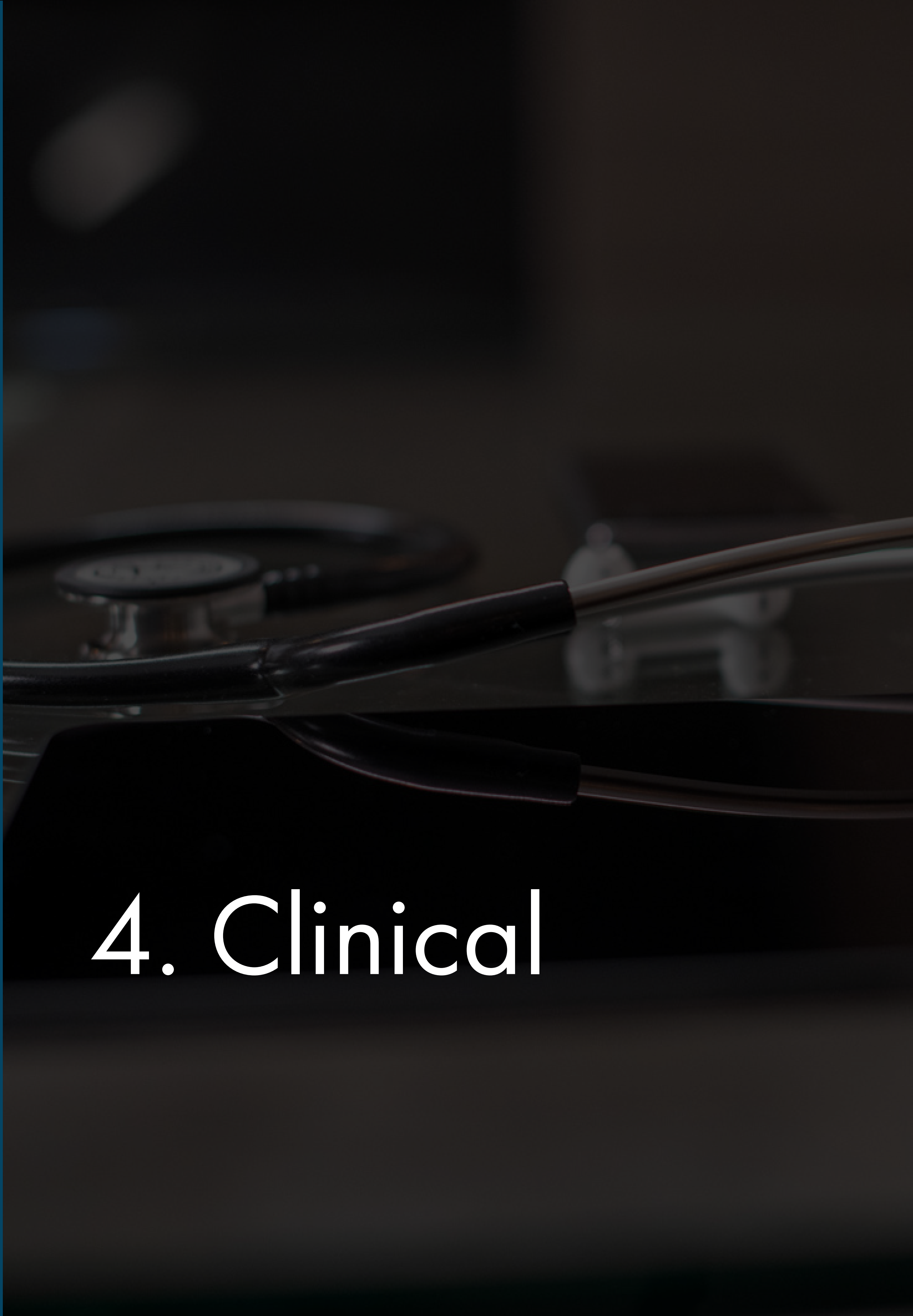
Patients must be logged in to their portal account to access their telemedicine appointment.

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.



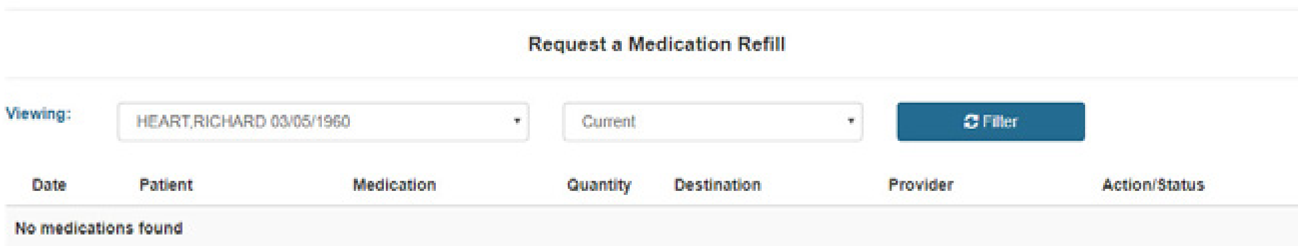
IMPORTANT NOTES:
The Start Telemedicine Call button will be disabled after the time of the appointment has passed. Patients who are late to connect their telemedicine appointment will be unable to use the Patient Portal to access their telemedicine appointment. They will need to access their appointment 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.



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:

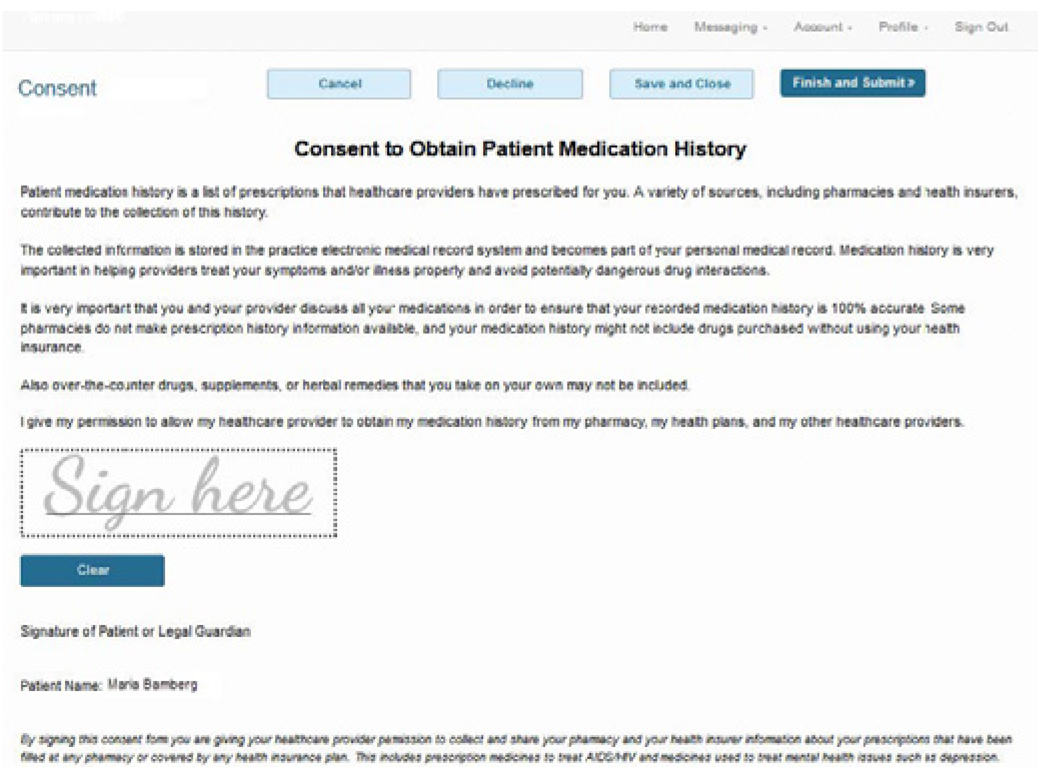
Cancel
Closes the form screen

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.



Home Messaging Account Profile Sign Out

Consent

Cancel Decline Save and Close Finish and Submit »

Consent to Obtain Patient Medication History

Patient medication history is a list of prescriptions that healthcare providers have prescribed for you. A variety of sources, including pharmacies and health insurers, contribute to the collection of this history.

The collected information is stored in the practice electronic medical record system and becomes part of your personal medical record. Medication history is very important in helping providers treat your symptoms and/or illness properly and avoid potentially dangerous drug interactions.

It is very important that you and your provider discuss all your medications in order to ensure that your recorded medication history is 100% accurate. Some pharmacies do not make prescription history information available, and your medication history might not include drugs purchased without using your health insurance.

Also over-the-counter drugs, supplements, or herbal remedies that you take on your own may not be included.

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.

Sign here

Clear

Signature of Patient or Legal Guardian

Patient Name: Maria Bamberg

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.