Allscripts FollowMyHealth®

Universal Health Record Patient Access v18.3

User Guide

Copyright © 2018 Allscripts Healthcare, LLC
and/or its affiliates. All Rights Reserved.

www.allscripts.com

Published Date: September 11, 2018 for release of Allscripts FollowMyHealth®
For further information about this manual or other Allscripts Healthcare, LLC products, contact Global Product Support Services, as follows:

Global Product Support Services

Allscripts Central Website: https://clientconnect.allscripts.com/welcome (Allscripts Central login is required. Contact information varies by product.)

Telephone: http://www.allscripts.com/contact-us/phone-numbers

The Documentation Center of Excellence welcomes your opinion regarding this document. Please email your comments and suggestions to userdoc@allscripts.com.

Proprietary Notice

© 2018 Allscripts Healthcare, LLC and/or its affiliates. All Rights Reserved.

This document contains confidential and proprietary information protected by trade secret and copyright law. This document, the information in this document, and all rights thereto are the sole and exclusive property of Allscripts Healthcare, LLC and/or its affiliates, are intended for use by customers and employees of Allscripts Healthcare, LLC and/or its affiliates and others authorized in writing by Allscripts Healthcare, LLC and/or its affiliates, and are not to be copied, used, or disclosed to anyone else, in whole or in part, without the express written permission of Allscripts Healthcare, LLC and/or its affiliates. For authorization from Allscripts Healthcare, LLC to copy this information, please call Allscripts Global Product Support Services at 888 GET-HELP or 888 438-4357. Notice to U.S. Government Users: This is “Commercial Computer Software Documentation” within the meaning of FAR Part 12.212 (October 1995), DFARS Part 227.7202 (June 1995) and DFARS 252.227-7014 (a) (June 1995). All use, modification, reproduction, release, performance, display, and disclosure shall be in strict accordance with the license terms of Allscripts Healthcare, LLC and/or its affiliates. Manufacturer is Allscripts Healthcare, LLC, and/or its affiliates, 222 Merchandise Mart Plaza, Suite #2024, Chicago, IL 60654.

IMPORTANT NOTICE REGARDING GOVERNMENT USE

The software and other materials provided to you by Allscripts Healthcare, LLC include "commercial computer software" and related documentation within the meaning of Federal Acquisition Regulation 2.101, 12.212, and 27.405-3 and Defense Federal Acquisition Regulation Supplement 227.7202 and 52.227-7014(a). These materials are highly proprietary to Allscripts Healthcare, LLC and its vendors. Users, including those that are representatives of the U.S. Government or any other government body, are permitted to use these materials only as expressly authorized in the applicable written agreement between Allscripts Healthcare, LLC and your organization. Neither your organization nor any government body shall receive any ownership, license, or other rights other than those expressly set forth in that agreement, irrespective of (a) whether your organization is an agency, agent, or other instrumentality of the U.S. Government or any other government body, (b) whether your organization is entering into or performing under the agreement in support of a U.S. Government or any other government agreement or utilizing any U.S. Government or any other government funding of any nature, or (c) anything else.

Allscripts FollowMyHealth® is a trademark of Allscripts Software, LLC and/or its affiliates.

All trademarks, service marks, trade names, trade dress, product names, and logos are property of their respective owners. Any rights not expressly granted herein are reserved.

The names and associated patient data used in this documentation are fictional and do not represent any real person living or otherwise. Any similarities to actual people are coincidental.

Images and option names used in this documentation might differ from how they are displayed in your environment. Certain options and labels vary according to your specific configuration. Images are for illustration purposes only.

Fee schedules, relative value units, conversion factors and/or related components are not assigned by the AMA, are not part of CPT, and the AMA is not recommending their use. The AMA does not directly or indirectly practice medicine or dispense medical services. The AMA assumes no liability for data contained or not contained herein.

Excel and Microsoft are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe, the Adobe logo, Acrobat, and Reader are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

iPhone® and iPad® are trademarks of Apple Inc., registered in the U.S. and other countries.

Perceptive Content, Lexmark, and the Lexmark logo are trademarks of Lexmark International, Inc., registered in the United States and/or other countries.

Allscripts Patient Administration Solution (PAS) contains barcode components licensed from IDAutomation.com, Inc. These products may only be used as part of and in connection with the Allscripts Patient Administration Solution software.

InterQual and InterQual Connect are registered trademarks of Change Healthcare, LLC in the United States or other countries.

Table of Contents

Chapter 1: Supported browsers....7

Chapter 2: FMH Sign In account....9
- Recovering your FMH Sign In user name....9
  - Recover your user name from the patient portal sign-in window....12
  - Recover your user name from your Sign Up and Connect window....18
- Reset your FMH Sign In password....25

Chapter 3: Get started as a new patient portal user....29
- Create a new FollowMyHealth account through an email invitation....29
- Create a new FollowMyHealth account without an email invitation....35
- Create a new FollowMyHealth account and connect to another account as an authorized individual....43

Chapter 4: Sign in as an existing user....53
- Sign in as an existing user with an alternative authentication method....53
- Sign in as an existing user with FMH Sign In....56
- Connect your existing account to a new organization or to an authorized individual....57
  - Connect your existing FollowMyHealth account to a different organization through an email invitation....57
  - Connect your existing FollowMyHealth account to another account as an authorized individual....60

Chapter 5: Static toolbar....63
- Search the patient portal....64
- My Account....65
  - Manage Connections....65
    - Add a connection to an organization....66
    - Configure organization clinic settings....68
    - View providers....69
    - Send a provider profile....70
    - Add an authorized individual to access your account....70
  - Manage billing....71

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Viewing your invoices....72
Pay your invoices....74
Billing questions....75
Manage account preferences....76
Manage sign-in methods....77
Set notification preferences....81
Set display preferences....85
Delete your universal health record account....86
Restore deleted information....86
View activity history....87
Get technical support and assistance for you patient portal account....87
Support information....88
My Info....88
Demographics....88
Edit preferred name....89
Edit birth sex, sexual orientation, and gender identity....90
Edit email address from Demographics....91
Edit your preferred pharmacy....92
Edit emergency contact....92
Edit responsible party....93
Edit insurance information....94

Chapter 6: The Home tab....97
Health Summary....97
Action Center....97
Recent Activity....100
Appointments....101
Check-in for your appointment....102
Request an appointment....103
Directly schedule the next available appointment....110
Directly schedule a future appointment....115
View upcoming appointments....126
Reschedule an appointment....128
Cancel an appointment....133
View past appointments....136
Billing on the Home tab....138
Single sign on....139
App Center....140
Install applications....141
Create a Health Journal entry....142
Manage My Charts data....145
Enter a blood sugar reading....149
Know My Health....151
Devices and applications....152

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Access devices and applications from My Account....154
Access devices and applications on the Home tab....154
Access devices and applications from a goal....155
Connect to devices and applications....157
Connect an iHealth health source....159
Connect a Telcare health source....159
Connect a Nokia health source....160
Connect a Fitbit health source....161
Connect a Garmin health source....161
Device list....162
Get Treated Now....165

Chapter 7: My Health....167
Summary....167
Manage your care team list....168
Import clinical summary documents....169
Download clinical summary documents....170
Email clinical summary documents....171
Conditions in your health record....172
Edit an active condition....172
Add an active condition....173
Add a surgical history condition....174
Add a family health condition....175
Add a personal health condition....176
Medications....177
Add or edit a medication....177
Add a preferred pharmacy....178
Request a medication renewal....179
Allergies....181
Add or edit an allergy....181
Immunizations....182
Add an immunization....183
View immunization details....184
View CDC immunization schedules....185
View vaccine information sheets....186
Share your immunization record....186
Vital signs....187
Add a vital sign....188
Results....188
Add a result....189
Graph results....190
View results....191
Documents....192
Add a document....192

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chart....194
Goals....194
Goal types....195
Weight management goal....195
Monitor weight goal....197
Monitor blood glucose goal....199
Monitor blood pressure goal....202
Monitor step goal....203
Manage your goals....204
View goals and readings....204
Accept a new goal....205
Add a reading....207
Decline a new goal....212
Decline an active goal....212
Access devices and applications from a goal....213
Notifications....215
Add a reminder....216
Delete a reminder from My Reminders....219
Edit a reminder from My Reminders....219

Chapter 8: Video visits....221
On-demand video visits....222
Start an on-demand video visit....224
Scheduled video visits....237
Schedule a video visit....237
Start a scheduled video visit....248
Action Center video visit notifications....251

Chapter 9: Email visits....253
Request an Email Visit from the Home tab....253
Request an email visit from Connections....266

Chapter 10: Inbox....281
Compose an email message....281
Create and edit Inbox folders....283

Index....285

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 1

Supported browsers

The following browsers are supported by the FollowMyHealth patient portal.

- Microsoft® Internet Explorer® 9.0 or later

  > **Note:** You must use Microsoft® Internet Explorer® 10.0 or later if you want to view goals from the **Goals** tab.

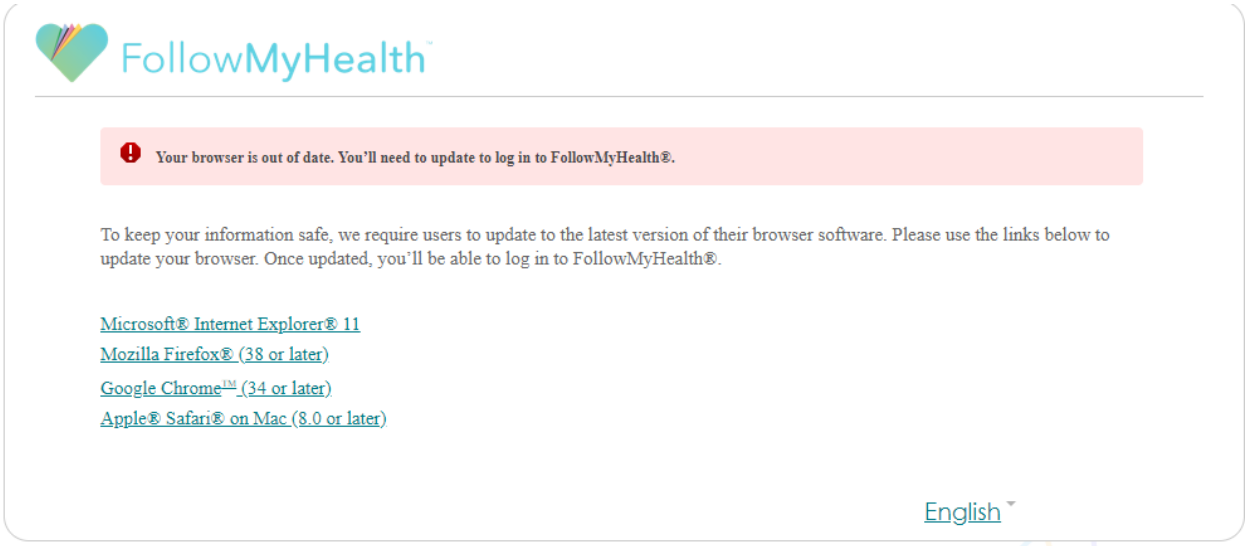
- Mozilla Firefox® 38 or later
- Google Chrome™ 34 or later
- Apple® Safari® 8.0 or later

Transport Layer Security 1.2 (TLS 1.2) requirement

FollowMyHealth requires browsers with Transport Layer Security 1.2 (TLS 1.2). This change is necessary to ensure the secure transmission of data.

Anyone navigating to FollowMyHealth that is not using a browser that supports TLS 1.2, or that does not have TLS 1.2 enabled, will be provided with instructions and links to update their browser. You can access FollowMyHealth after upgrading to a browser that supports TLS 1.2.

The following screenshot is an example of the information displayed if you have not updated your browser.



Use the following links to download the latest versions of impacted browsers.

- **Microsoft® Internet Explorer® 11**

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- **Mozilla Firefox® (38 or later)**
- **Google ChromeTM (34 or later)**
- **Apple® Safari® on Mac (8.0 or later)**

FollowMyHealth is compliant with Web Content Accessibility Guidelines (WCAG) 2.0, Level A.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 2

FMH Sign In account

You must create FMH Sign In credentials when you create your patient portal account. This is a unique FollowMyHealth user name and password used to access the patient portal.

The icon identifies the FMH Sign In section on the sign-in window.

It is best practice to use your FMH Secure Sign In account for signing in to your patient portal record, but if you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated with 1 of these accounts. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information in your patient portal account is NEVER shared, posted, or exchanged with these services.

You are required to keep your FMH Sign In account connected to your portal account even if you do not use it. Sign-in methods are managed in the patient portal at **My Account > Preferences > Sign In Preferences**. All alternative methods can be removed, but you cannot remove your FMH Sign In credentials.

When you create your new patient portal account, the email address that is associated with your account or the email that your organization has on record for you, is automatically used as your FMH Sign In user name.

Two-factor authentication is an optional security feature that you can add to your sign-in process. This verification provides a second layer of security to protect your account.

You can enable two-factor authentication after your account is created. See the section in this guide, "Two-factor authentication", for more information.

Recovering your FMH Sign In user name

If you cannot remember your FMH Sign In user name, there are several ways that you can recover your user name.

Recover your user name from the patient portal sign-in window

Use the **Forgot your username** link on the FollowMyHealth sign-in window to start the user name recovery workflow. Refer to "Recover your user name from the patient portal sign-in window" for instructions.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Recover your user name from the Sign Up and Connect window

Use the **Forgot your username** link on **Sign Up and Connect** to start the user name recovery workflow if you are connecting another account with a patient invitation. Refer to "Recover your user name from the Sign Up and Connect window" for instructions.

Recover your user name by accessing original confirmation email

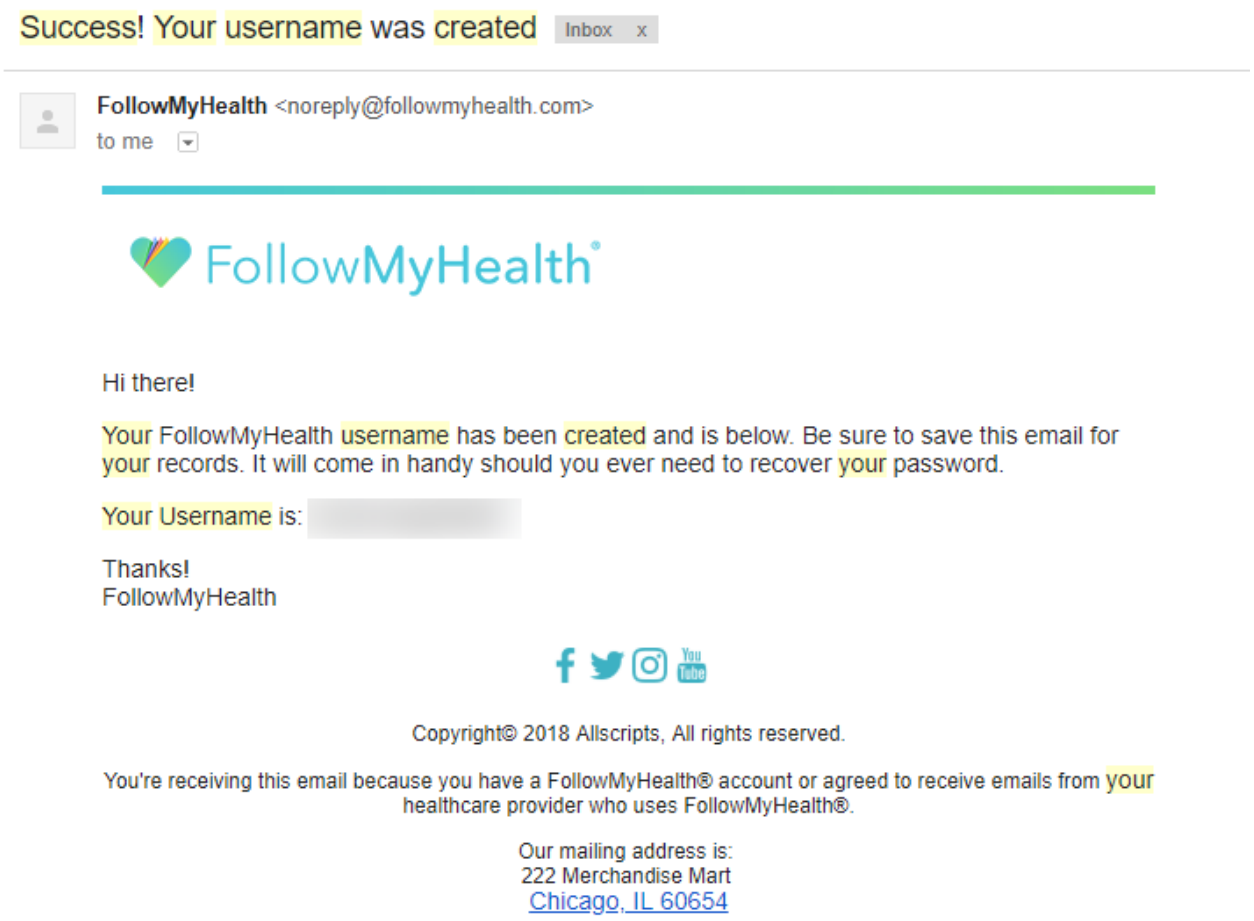
When you created the specific user name, a confirmation email was sent to you with the subject, "FMH Sign In Account Created." If you can find that email, it has the correct, connected user name in it.

To find the email in your Inbox or other folders, search on the following items.

- The email is sent from "noreply@followmyhealth.com".
- The subject of the email is "FMH Sign In Account Created".

If you have this email, it should have your correct, connected user name listed.

The following figure includes the information available in the email.



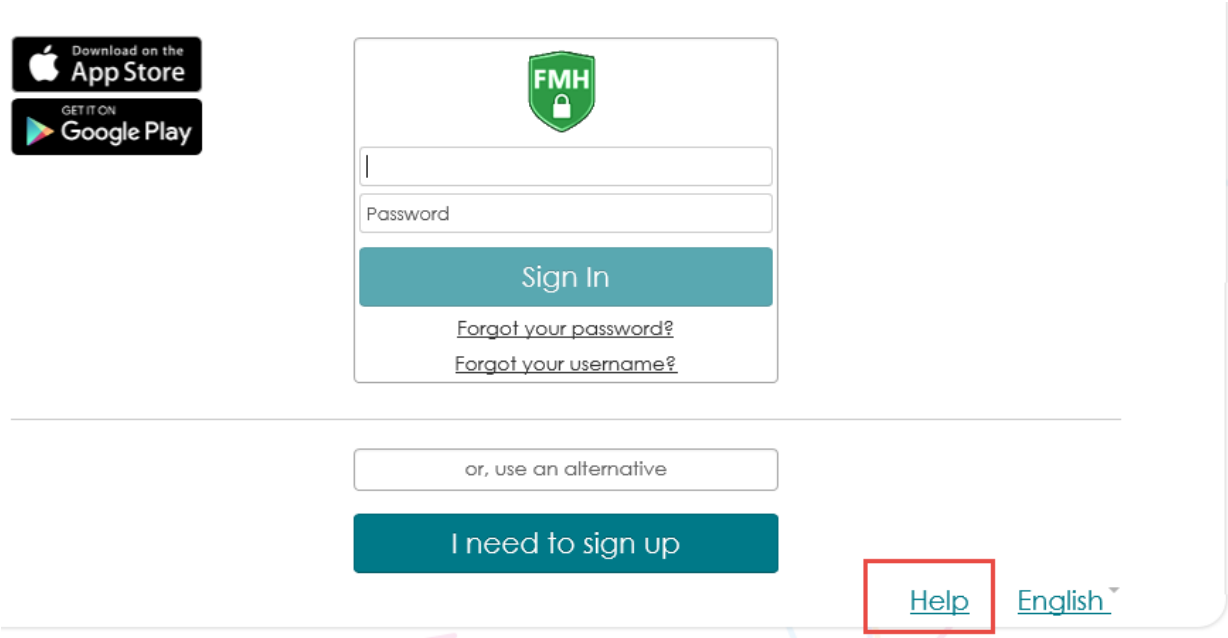
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Contact your health care organization's support

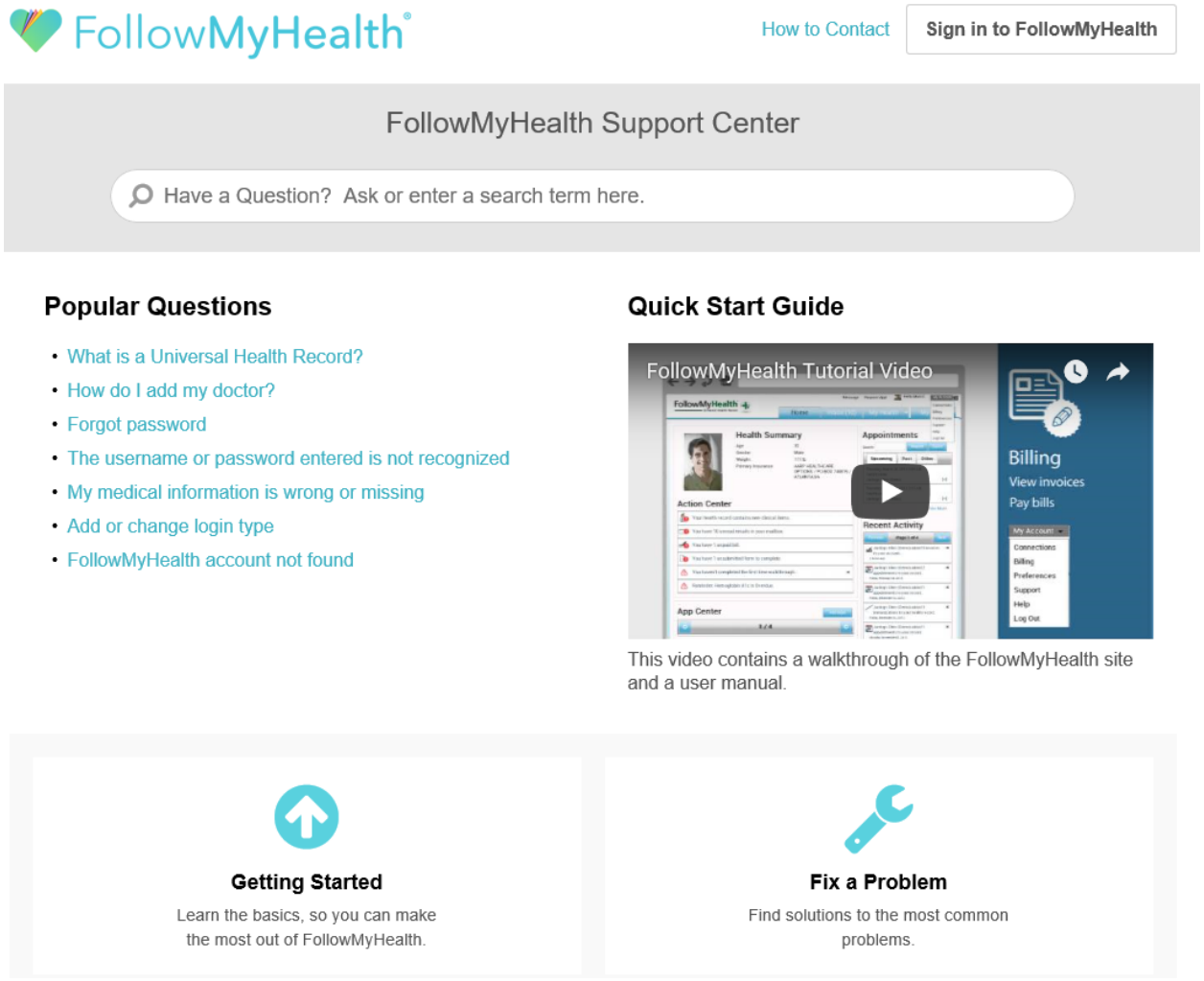
A support representative can send your user name to the email account that is associated with your patient portal account. You can then go to the email account and retrieve your user name from the email sent by your support representative.

Access Help from FollowMyHealth sign-in window

Click **Help** on the FollowMyHealth sign-in window to access the support pages.



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Click **The username or password entered is not recognized**.

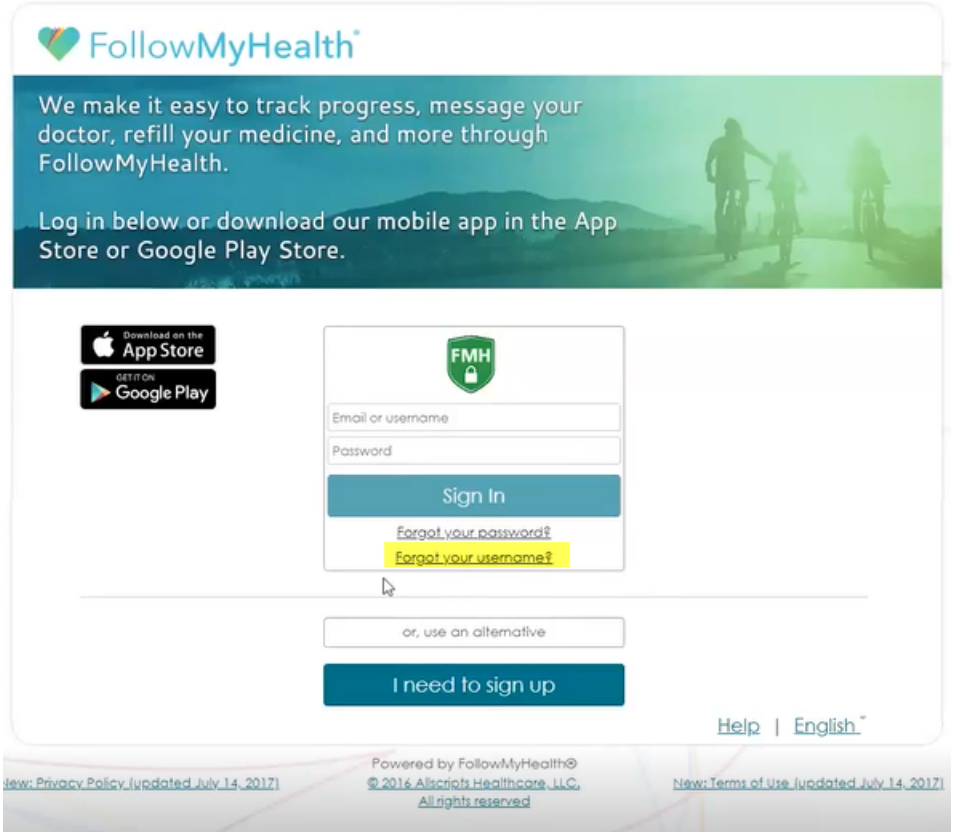
Recover your user name from the patient portal sign-in window

Use the **Forgot your username link** on the patient portal sign-in window to recover your FollowMyHealth user name.

If you are using third-party credentials to sign in to FollowMyHealth, such as Facebook, Google, Yahoo!®, or Microsoft®, you cannot recover the user name. You must have an FMH Sign In account to recover your user name. If you do not have an FMH Sign In user name, you are prompted during the following steps to create an FMH Sign In user name.

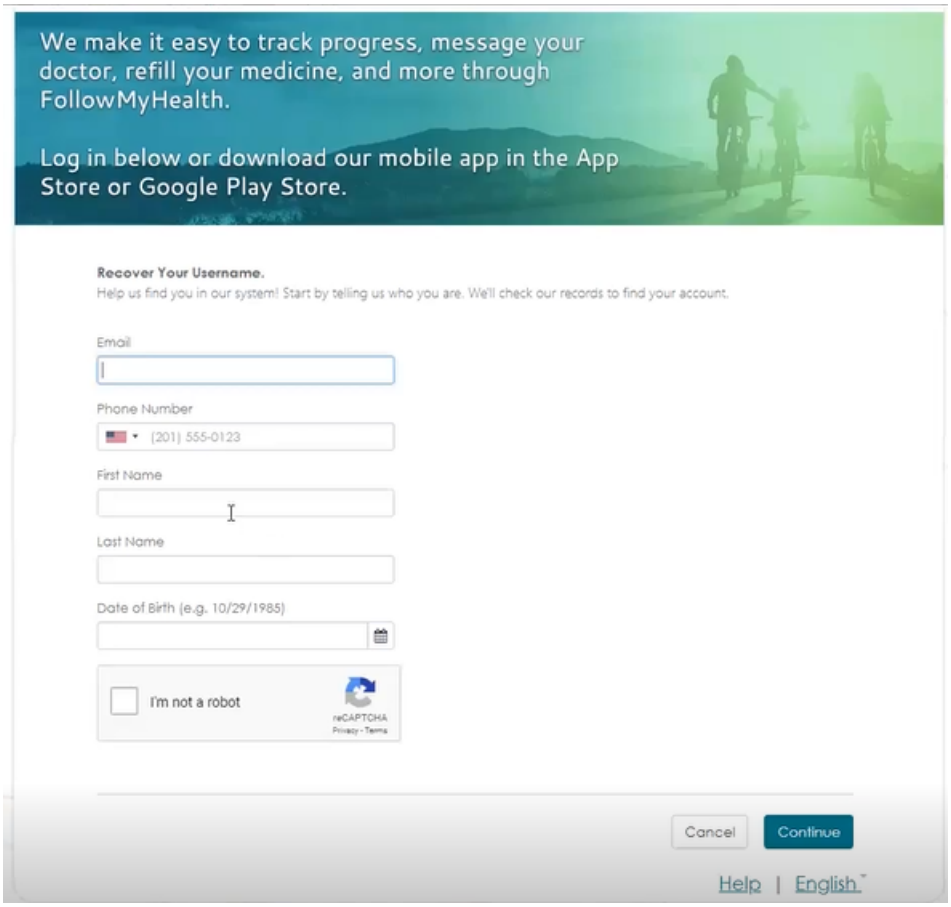
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

1. Open the patient portal sign-in window.



2. Click **Forgot your username**.
   Recover Your Username opens.

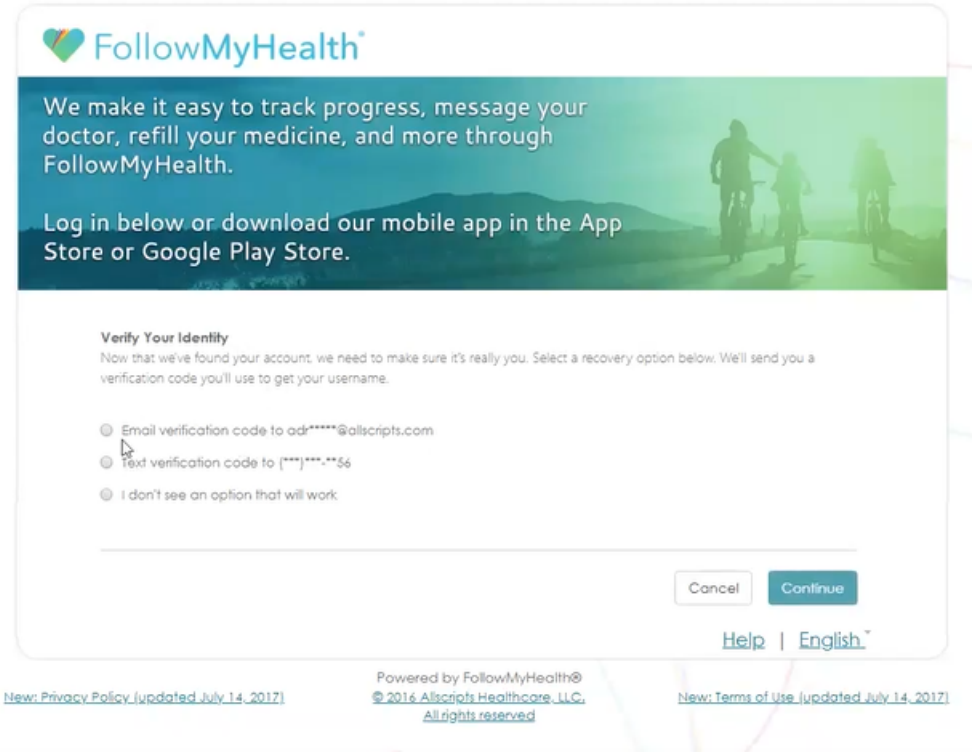
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. Enter information that matches the information you used when you originally created your account.
4. Select **I'm not a robot** and complete the security step.
5. Click **Continue**.

   Verify your Identity opens.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



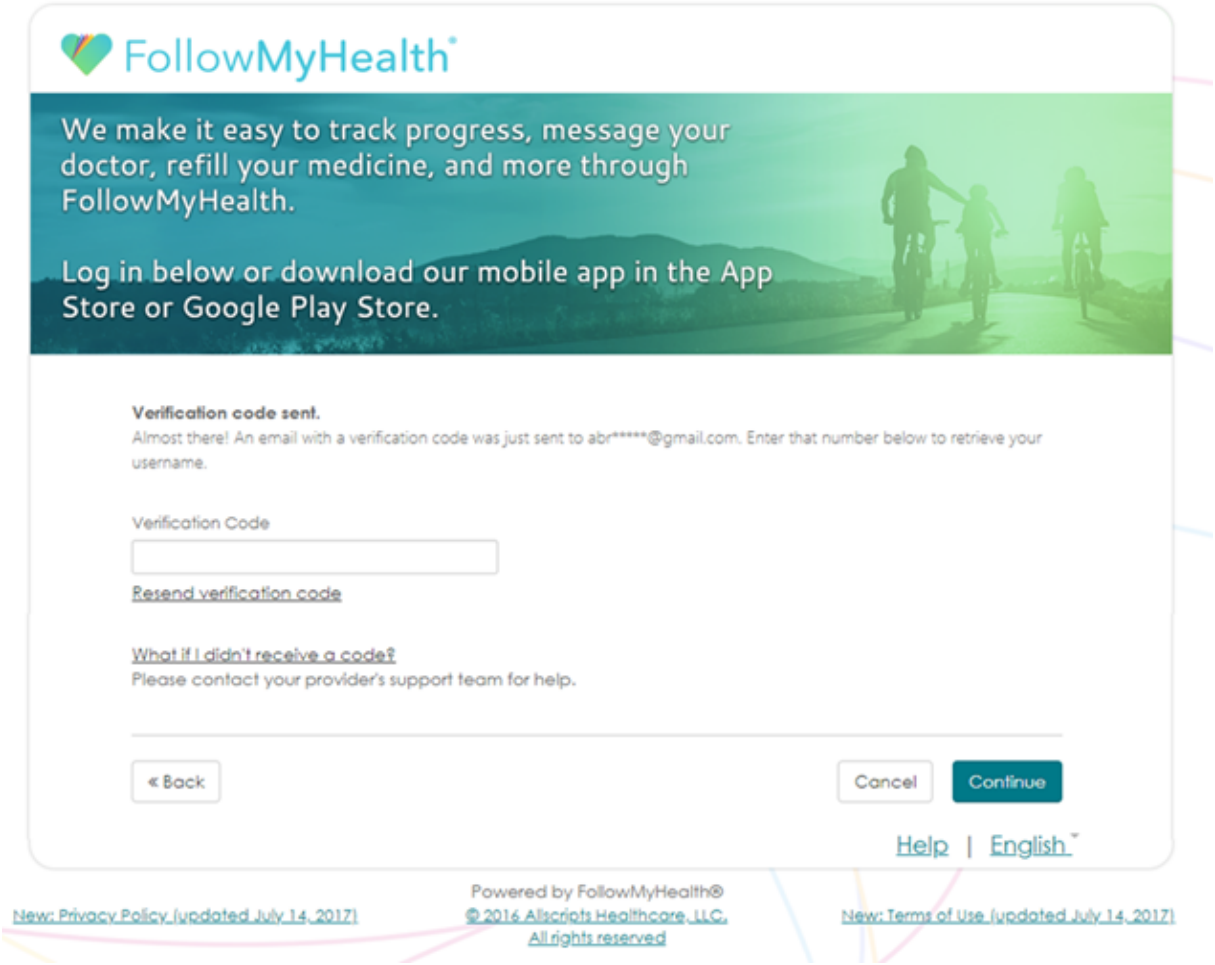
Your identity is verified by receiving a text or email message. A code is sent through a text message to the cell phone number on the account or an email message to the email address used with your account. The cell phone number must be a verified number. If you do not have a verified phone number associated with your patient portal account, the text message option is not available.

A third option is available if you do not have access to text or email messaging. In this scenario, when the you select **I don't see an option that will work**, a message window opens advising you to contact technical support.

6. Select a verification method and click **Continue**.

   Verification code sent opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



7. Check your email or text messaging for the verification code.

   If you do not receive a code, or need a new code, click **Resend verification code** or **What if I didn't receive a code**. A code can be resent up to three times. If you do not remember your code the third time, your account is locked for five minutes.

   An email message is sent to your email address to notify you made the maximum number of attempts to resend the code and you are locked from trying to recover your user name.

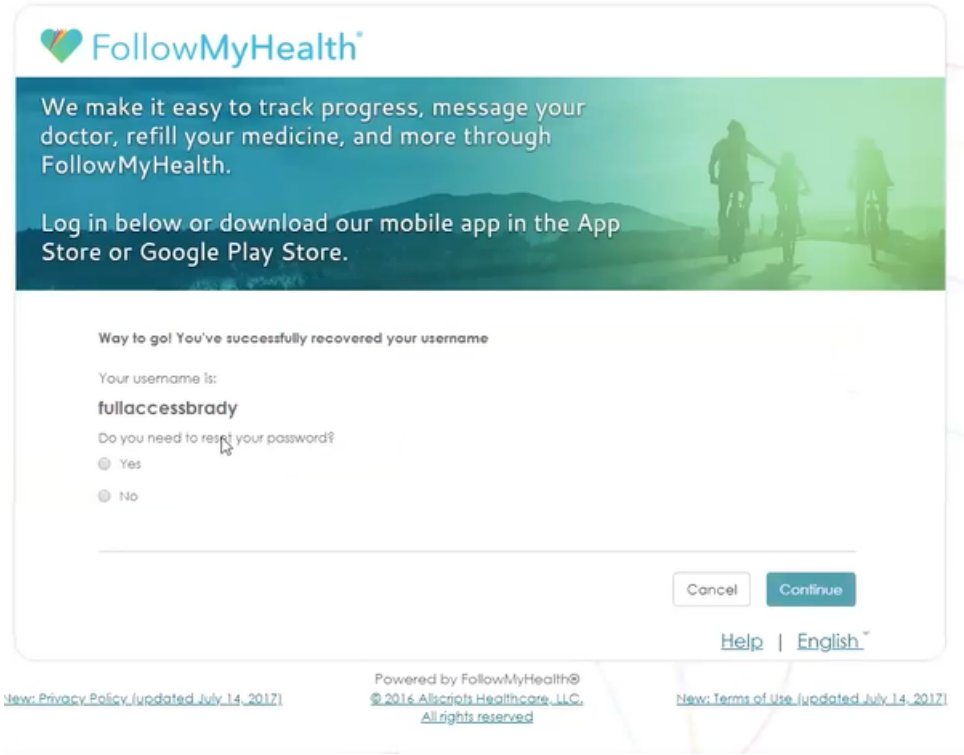
   If you happen to remember your user name, you can sign in even if you were locked out from user name recovery.

   After five minutes, you can attempt to recover your user name again.

8. Enter the verification code.

   A window opens with your user name.

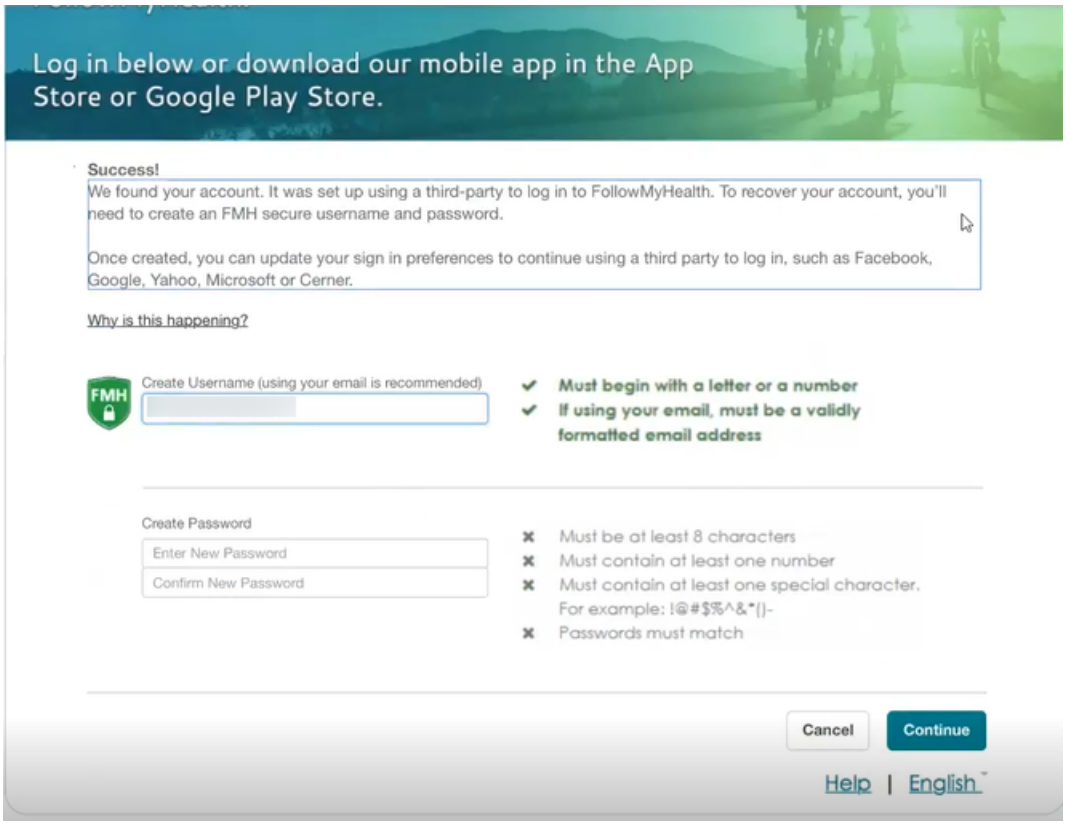
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



You can also reset your password from this window. If you do not change your password, when you click **Continue**, the sign-in window opens with your user name automatically filled. If you do change the password, when you click **Continue**, you are signed-in directly.

If you are using third-party credentials to sign in, such as Facebook, Google, Yahoo!®, or Microsoft®, you cannot recover your user name and are presented with a window to update the sign-in credentials to use FMH Sign In.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Your email address is automatically filled as your FMH Sign In user name. After entering a password and clicking **Continue**, you are signed in to the patient portal and have a new FMH Sign In user name and password.

Results of this task

Your user name is recovered or you created a new FMH Sign In user name and password. An email message is sent to notify you have successfully recovered your user name.

Recover your user name from your Sign Up and Connect window

If you want to add another connection to your patient portal account and you received the invitation through an email invitation, but forgot your user name, you can recover your user name from **Sign Up and Connect**.

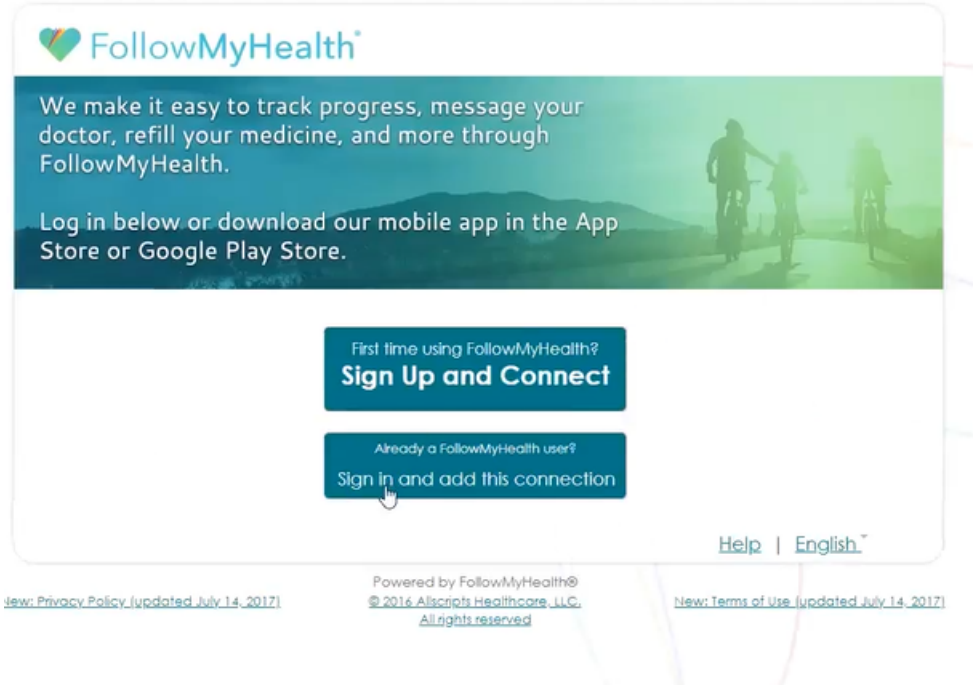
If you are using third-party credentials to sign in to FollowMyHealth, such as Facebook, Google, Yahoo!®, or Microsoft®, you cannot recover the user name. You must have an FMH Sign In account

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

to recover your user name. If you do not have an FMH Sign In user name, you are prompted during the following steps to create a FMH Sign In user name.

1. Open the email account associated with your patient portal account.
2. Locate the patient invitation email that you received to add the new connection and click the email invitation link.

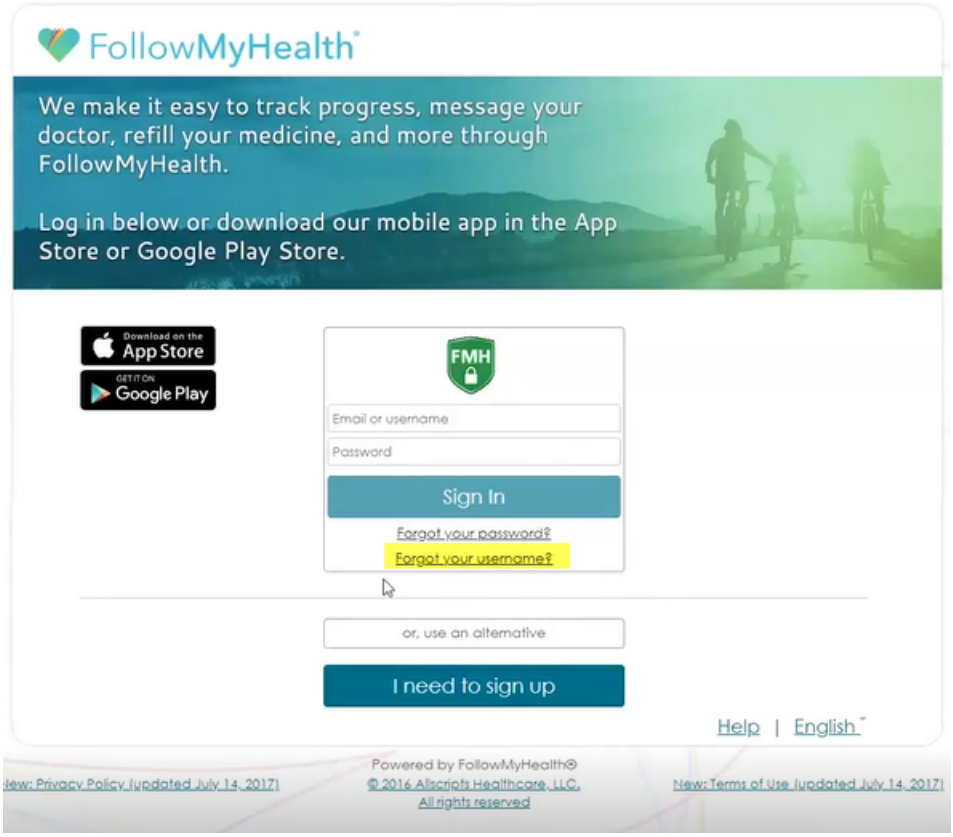
   Sign Up and Connect opens.



3. Click **Sign in and add this connection**.

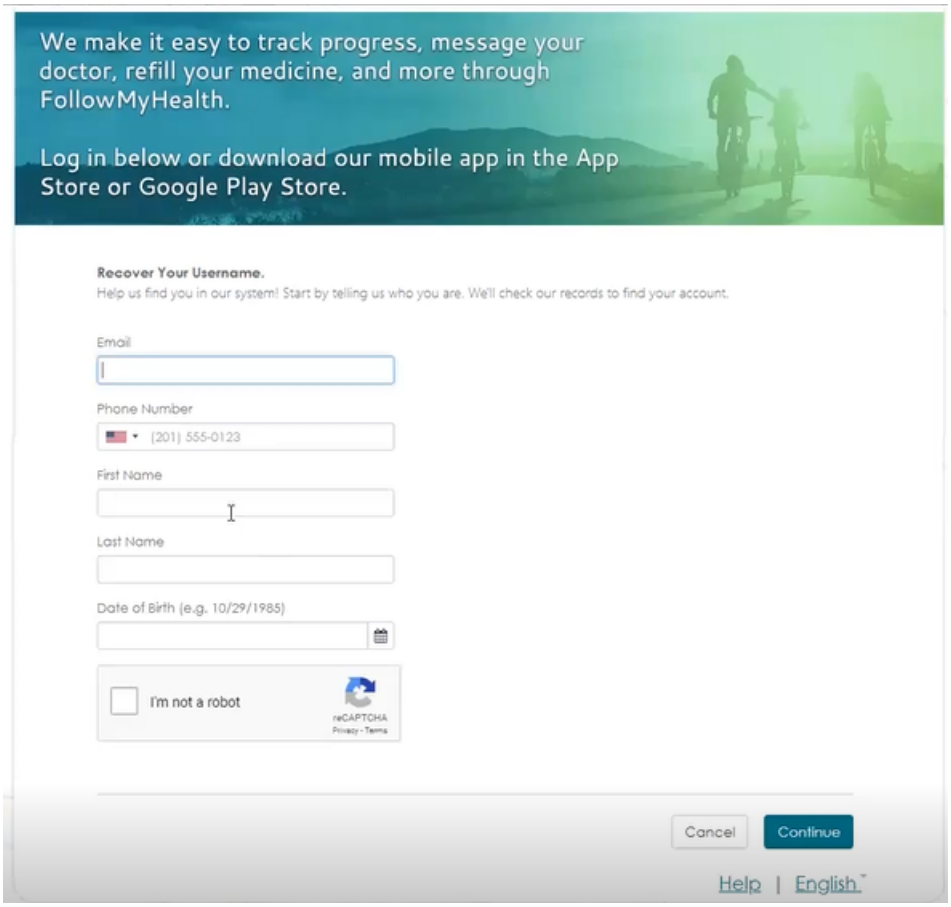
   The patient portal sign-in window opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



4. Click **Forgot your username**.
   Recover Your Username opens.

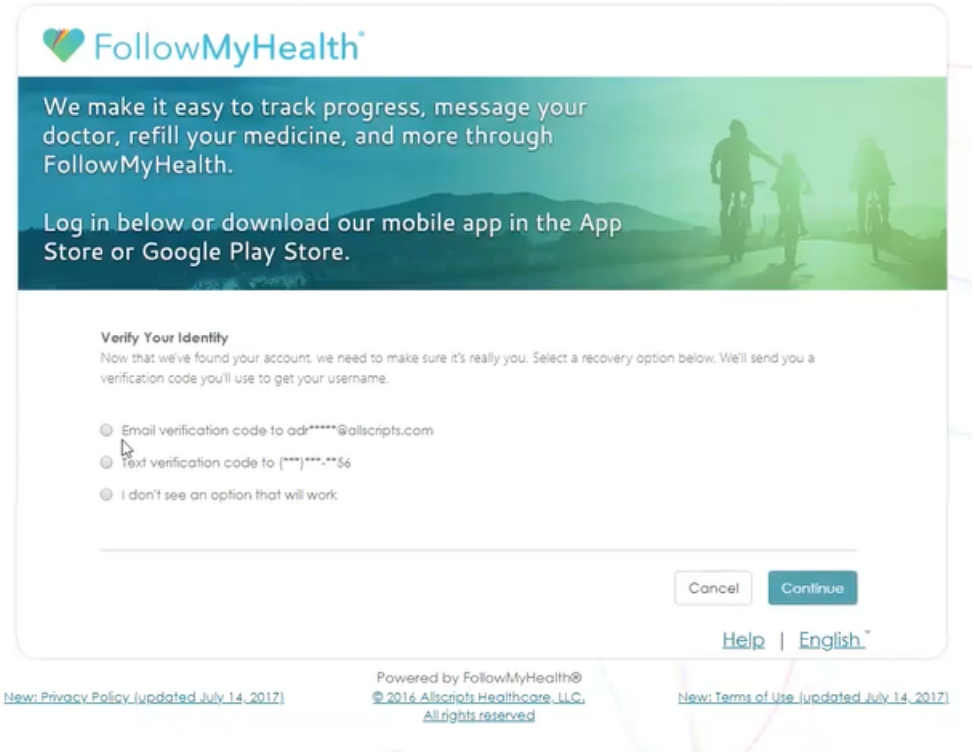
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Enter information that matches the information you used when you originally created your account.
6. Select **I'm not a robot** and complete the security step.
7. Click **Continue**.

   Verify your Identity opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



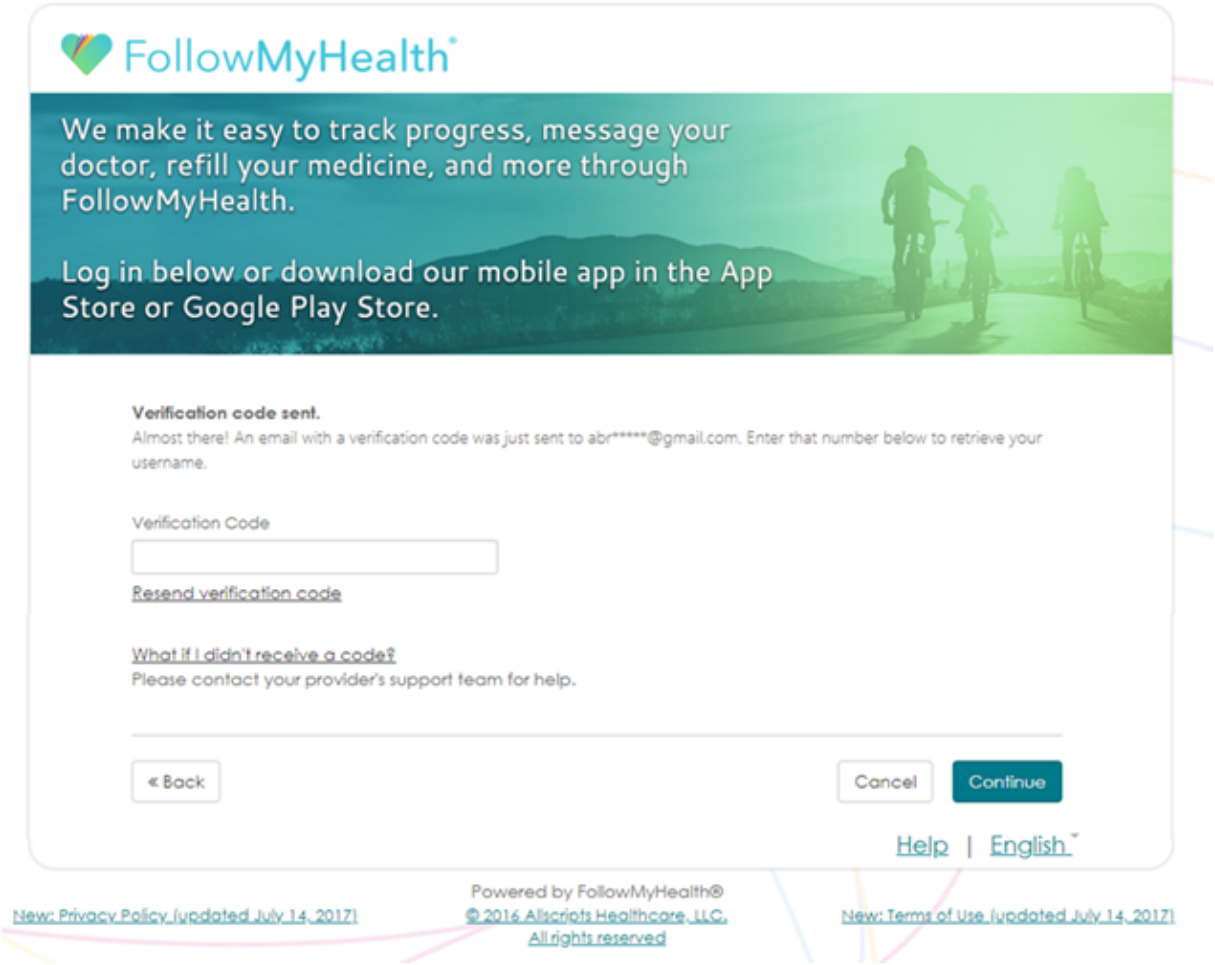
Your identity is verified by receiving a text or email message. A code is sent through a text message to the cell phone number on the account or an email message to the email address used with your account. The cell phone number must be a verified number. If you do not have a verified phone number associated with your patient portal account, the text message option is not available.

A third option is available if you do not have access to text or email messaging. In this scenario, when the you select **I don't see an option that will work**, a message window opens advising you to contact technical support.

8. Select a verification method and click **Continue**.

   Verification code sent opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



9. Check your email or text messaging for the verification code.

   If you do not receive a code, or need a new code, click **Resend verification code** or **What if I didn't receive a code**. A code can be resent up to three times. If you do not remember your code the third time, your account is locked for five minutes.

   An email message is sent to your email address to notify you made the maximum number of attempts to resend the code and you are locked from trying to recover your user name.

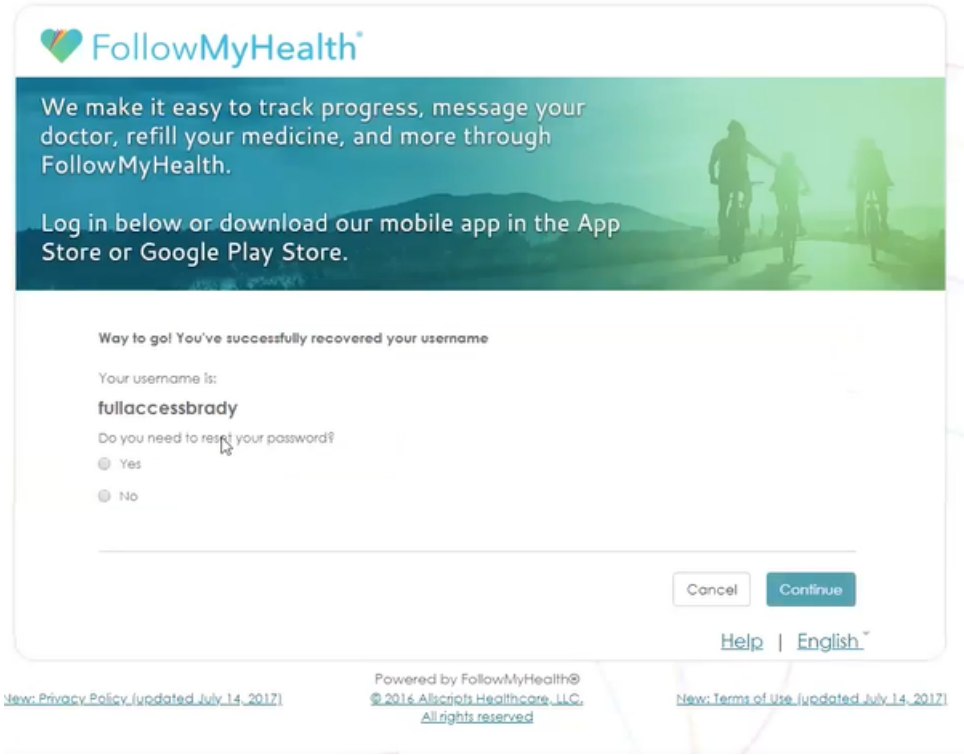
   If you happen to remember your user name, you can sign in even if you were locked out from user name recovery.

   After five minutes, you can attempt to recover your user name again.

10. Enter the verification code.

    A window opens with your user name.

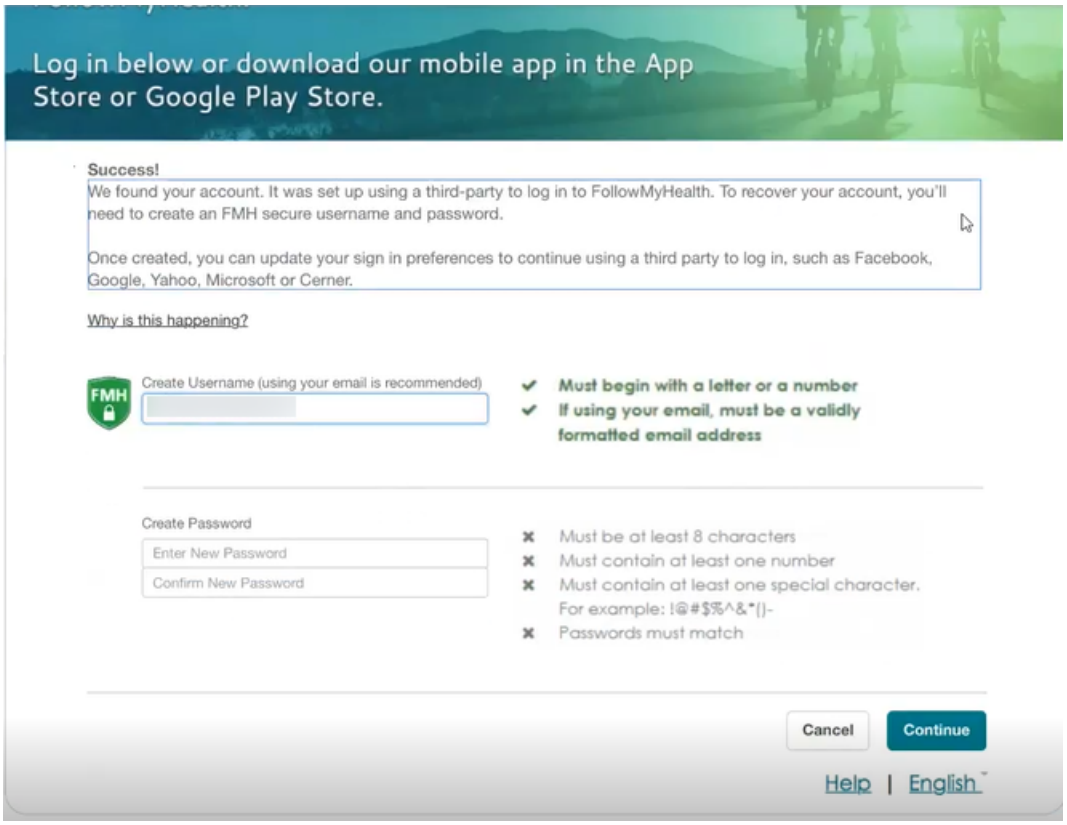
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



You can also reset your password from this window. If you do not change your password, when you click **Continue**, **Welcome** opens with your user name automatically filled and you can continue the registration process for the new connection.

If you are using third-party credentials to sign in, such as Facebook, Google, Yahoo!®, or Microsoft®, you cannot recover your user name and are presented with a window to update the sign-in credentials to use FMH Sign In.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Your email address is automatically filled as your FMH Sign In user name. After entering a password and clicking **Continue**, you are signed in to the patient portal and have a new FMH Sign In user name and password.

Results of this task

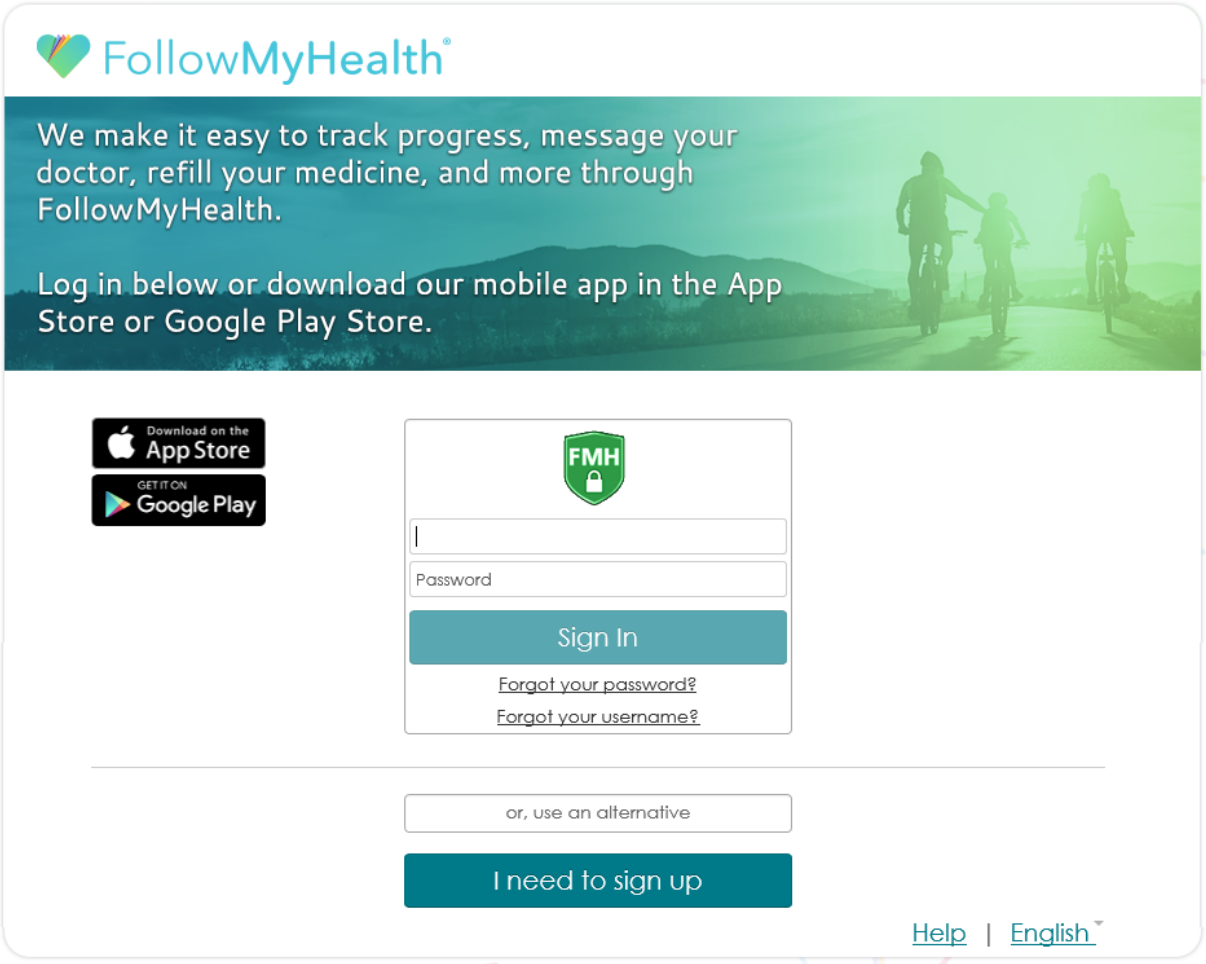
Your user name is recovered or you created a new FMH Sign In user name and password. An email message is sent to notify you have successfully recovered your user name.

Reset your FMH Sign In password

You can reset your FMH Sign In password from the patient portal sign-in window.

1. Go to the patient portal sign-in window.
2. Click **Forgot your password**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



A window opens to enter your user name.

3. Enter your user name and click **Reset**.

   Your user name is required to reset your password. If you forgot your user name, contact your healthcare organization's support team. Your healthcare organization can send an email message to the email address associated with your FollowMyHealth account that includes your FMH Sign In user name.

   A message is displayed that you have requested a password reset. An email with instructions to complete the reset process is sent to the email address associated with your FollowMyHealth user name (not your patient portal Inbox).

4. Go to your email that is associated with your patient portal account.
5. Open the FMH Secure Login Password Reset Request message.
6. Click **Reset Password**.

   Update Password opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

7. For **New password**, enter a password.
8. For **Confirm new password**, re-enter the password.
9. Click **Save**.

Results of this task

Your password is reset.

What to do next

Use your password to sign in to the patient portal.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 3

Get started as a new patient portal user

You can get started as a patient portal user by creating an account through an email invitation sent from your provider, creating an account from the patient portal sign-in window, or creating an account and connecting the account to an existing account as an authorized individual.

Review the following scenarios and select the scenario that fits your situation. Each scenario includes step-by-step instructions to get started using the patient portal.

- Create a new FollowMyHealth® account through an email invitation.
- Create a new FollowMyHealth® account without an email invitation.
- Create a new FollowMyHealth® account and connect to another as an authorized individual.

Create a new FollowMyHealth account through an email invitation

Your provider sends you an email invitation with a registration link to www.followmyhealth.com. The email invitation contains an individualized link to the FollowMyHealth sign-in window.

Before you begin

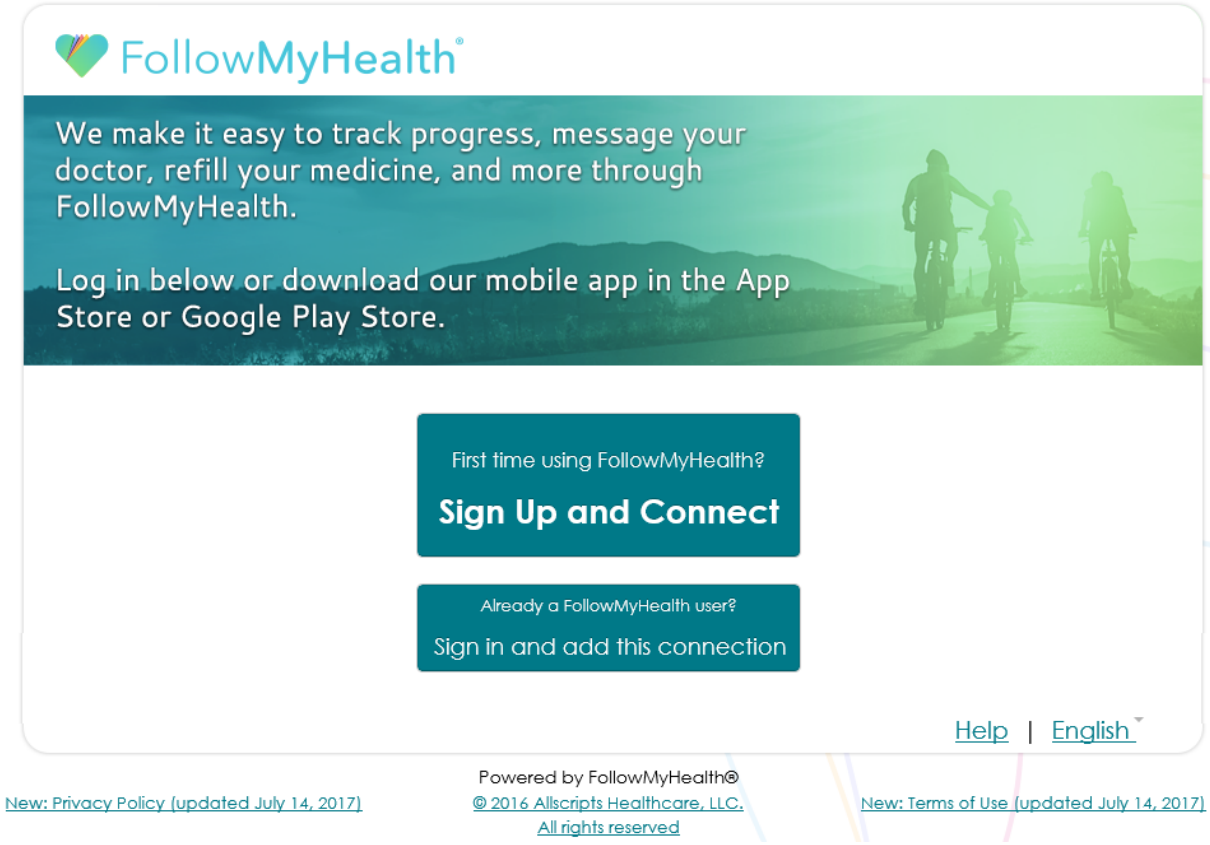
The user name and password that you create are your FMH Sign In credentials. Best practice is to use this specific patient portal user name and password to sign in to your account. The FMH Sign In section is identified by the icon.

There are alternative sign in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated with either of these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

1. Go to the email Inbox that is associated with your patient portal account.
2. Find and open the patient portal email invitation sent by your provider or health care organization.
3. From the email, click the **Click here to begin registration** link.

   The FollowMyHealth sign-in window for new connections is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

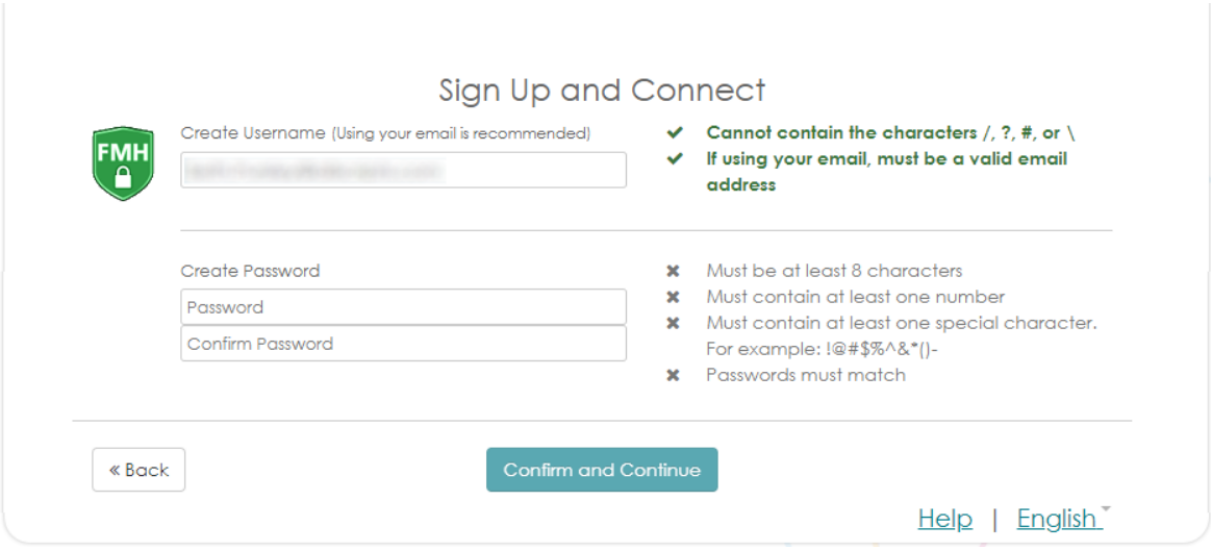


> **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign Up and Connect** and **Sign in and add this connection** are always displayed.

4. Click **Sign Up and Connect**.

   Sign Up and Connect is displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. For **Create Username**, enter your email address if it is not already automatically filled. Or you can enter a user name other than an email address.

   Your user name cannot contain the characters /, ?, #, or \.

   After you create your account, this email address is also listed under **My Info > Demographics > Contact Information**.

   > **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message, indicating the guideline that was not followed, is displayed in red bold font.

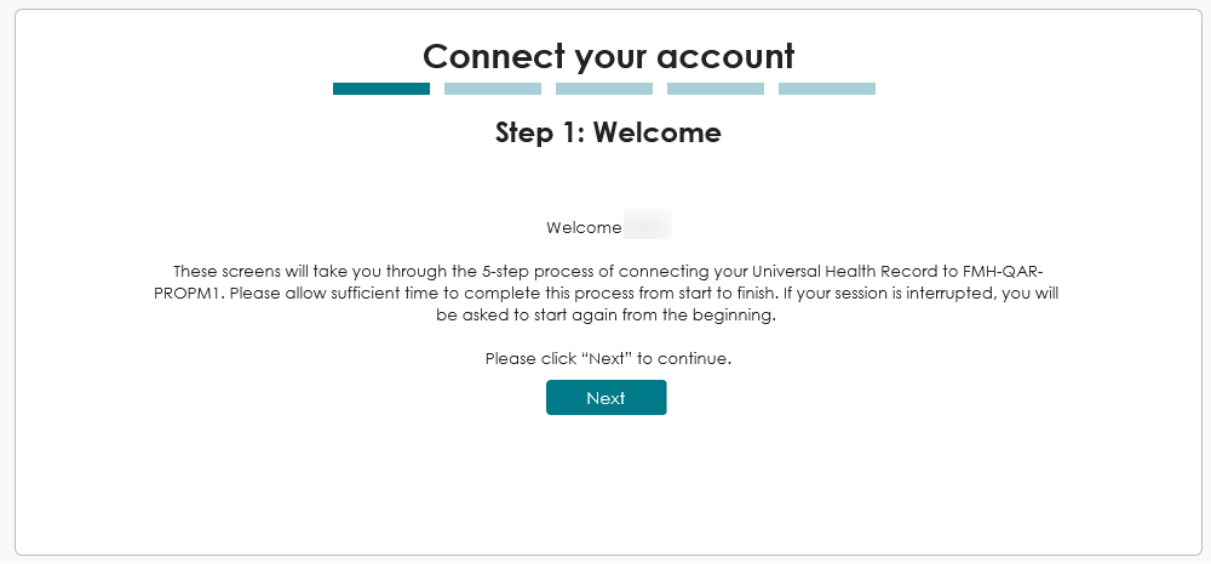
6. For **Password**, enter a password that meets the requirements listed on the right side of the window.
7. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

   > **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth account), the following error message is displayed: `Someone already has that user name. Please try a different one.` You must enter a new valid user name to proceed.

8. Click **Confirm and Continue**.

   The **Invite Wizard** starts and **Connect your account Step 1: Welcome** opens.

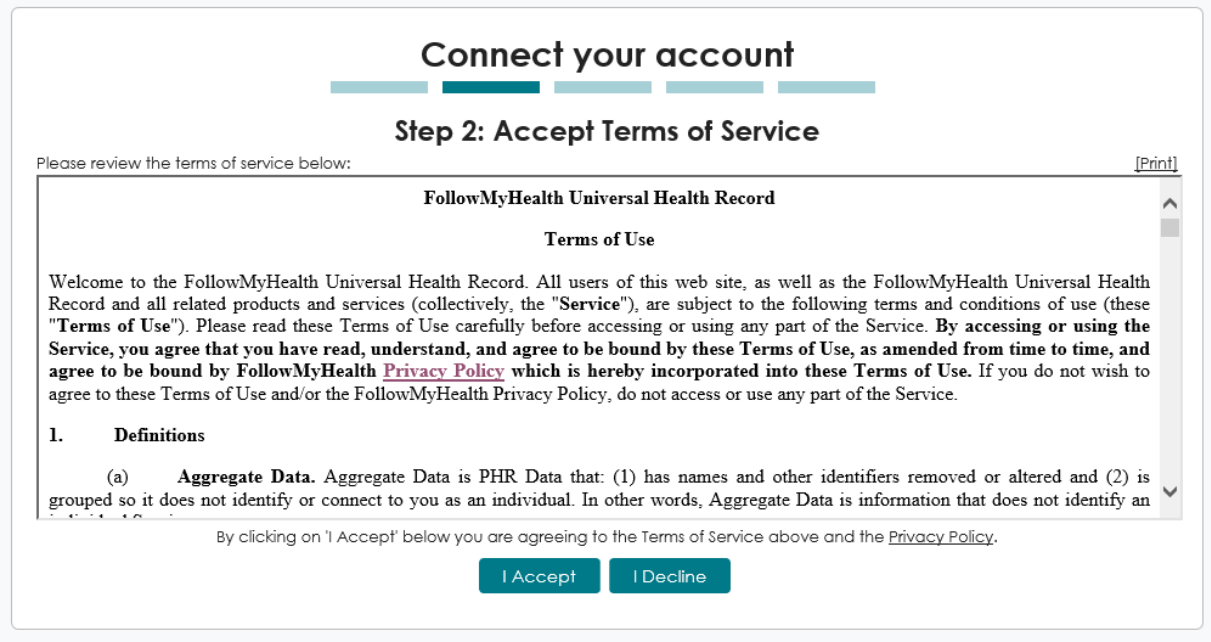
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



The progress bar represents the step you are on during the account connection process.

9. Click **Next**.

   Connect your account Step 2: Accept Terms of Service opens.

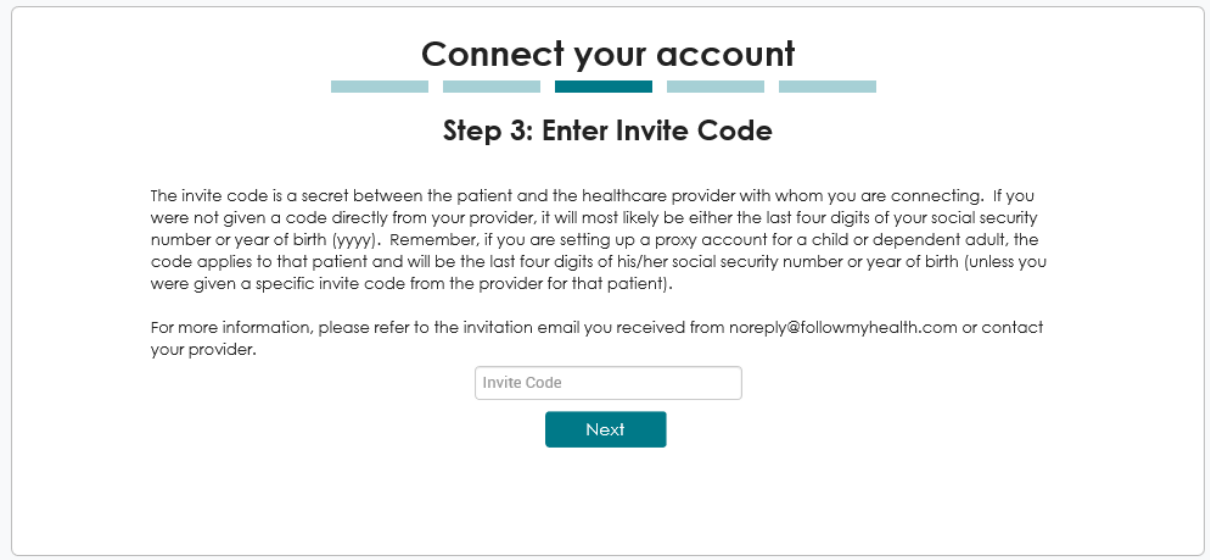


10. Read the terms of service and click **I Accept**.

> **Note:** You must accept the terms of service. You can also access the privacy policy on this step by clicking **Privacy Policy**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

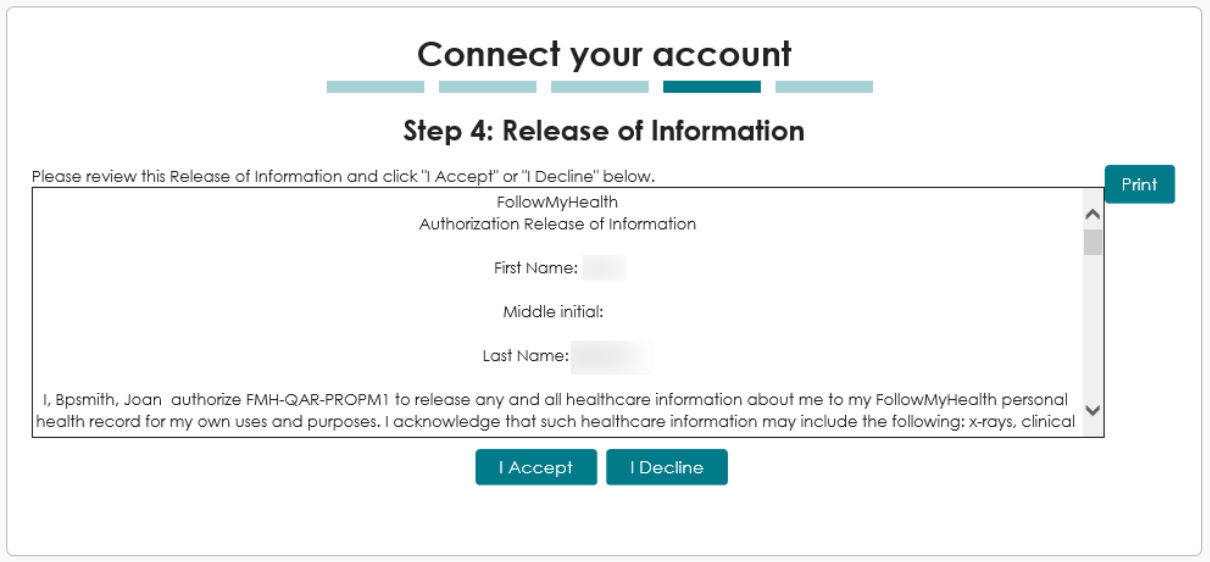
Connect your account Step 3: Enter Invite Code opens.



11. Enter the invitation code from your healthcare organization and click **Next**.

> **Note:** The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

Connect your account Step 4: Release of Information opens.



The ROI permits FollowMyHealth to obtain and store your medical information from the organization. If you decline, you are not connected to the organization, cannot view your medical

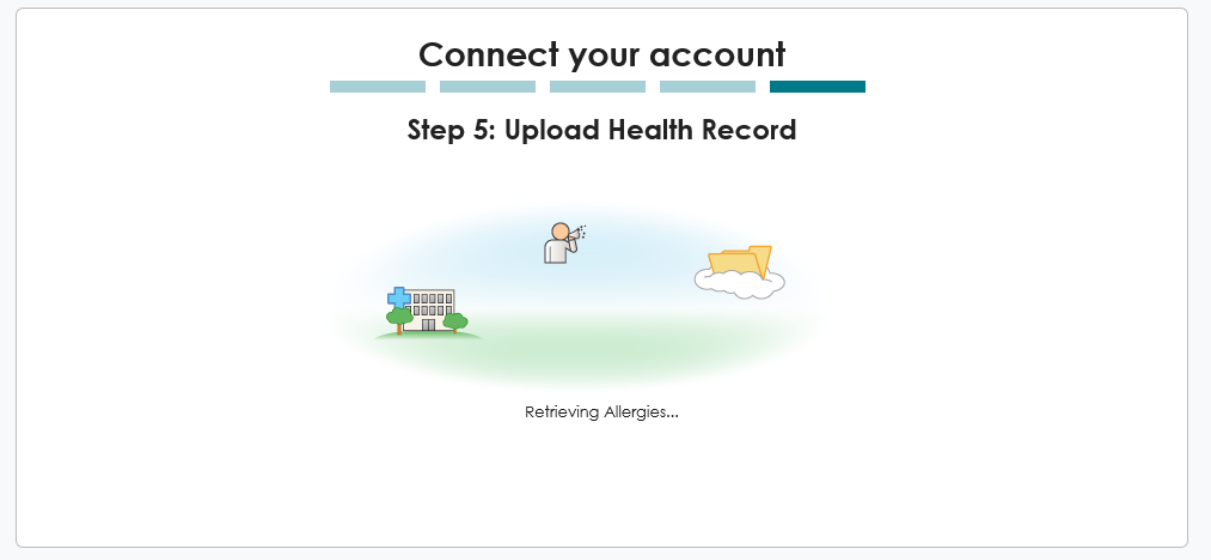
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth and the ROI is expired, **Release of Information** opens. You must click **I Accept** to renew the ROI and stay connected to the organization and continue to view your medical information. If you click **Decline**, a confirmation window opens where you must confirm that you want decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

12. Click **I Accept** to release your healthcare record to FollowMyHealth.

    Connect your account Step 5: Upload Health Record is displayed.



This window displays the progress of retrieving data from the organization. Monitor the progress to ensure the data is uploaded successfully.

When the upload is complete, the patient portal opens.

Results of this task

You created a new account and connected to the organization that sent you the email invitation.

What to do next

View pending connections at **My Account > Connections**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Create a new FollowMyHealth account without an email invitation

If you did not receive an invitation from your provider, but want to become a user, you must create an account from the FollowMyHealth sign-in window.

Before you begin

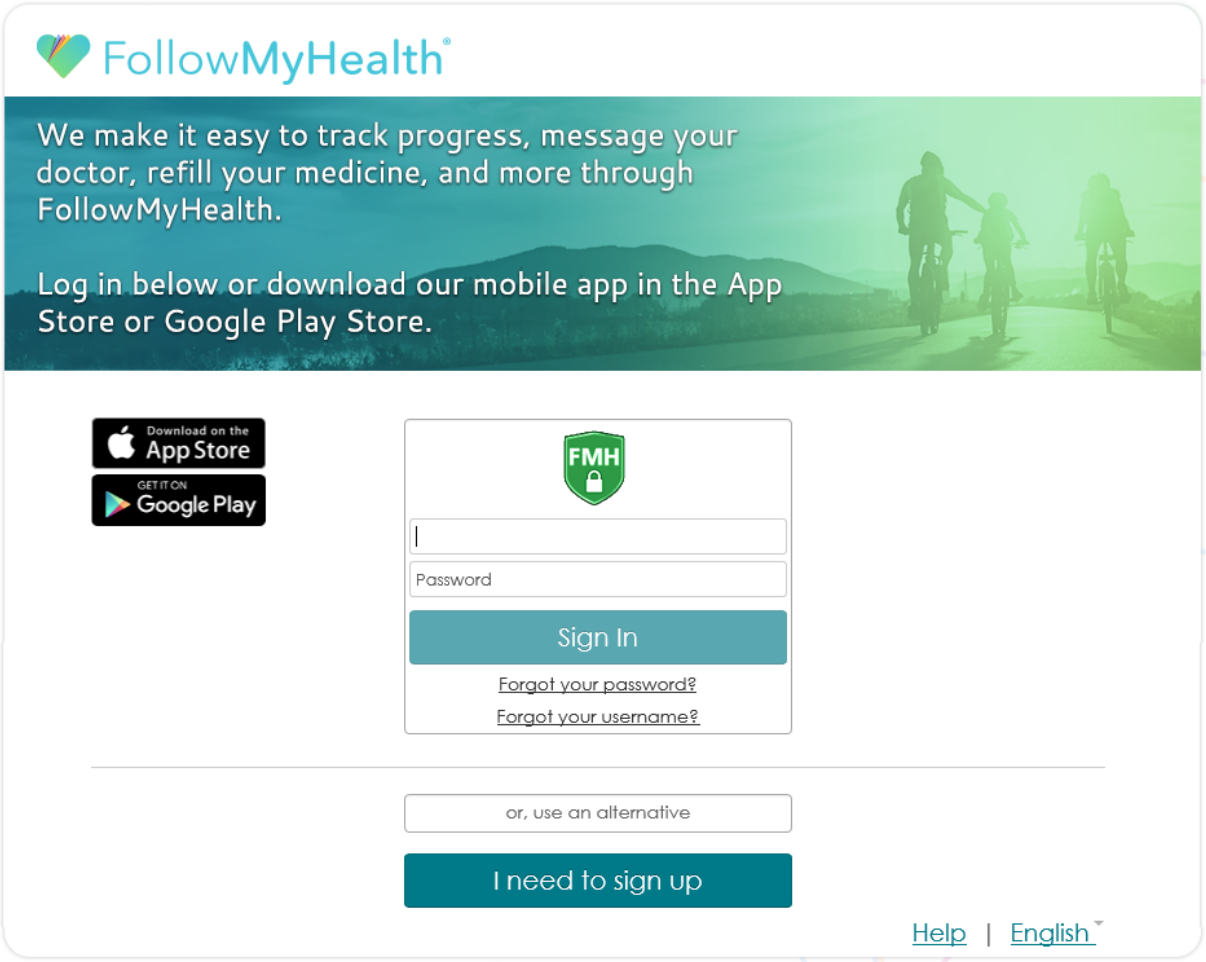
The user name and password that you create are your FMH Sign In credentials. Best practice is to use this specific FollowMyHealth user name and password to sign in to your account. The FMH Sign In section is identified by the icon.

There are alternative sign-in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated with either of these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to FollowMyHealth. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

1. Go to **www.followmyhealth.com** or the URL provided by the organization.

   The FollowMyHealth sign-in window opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

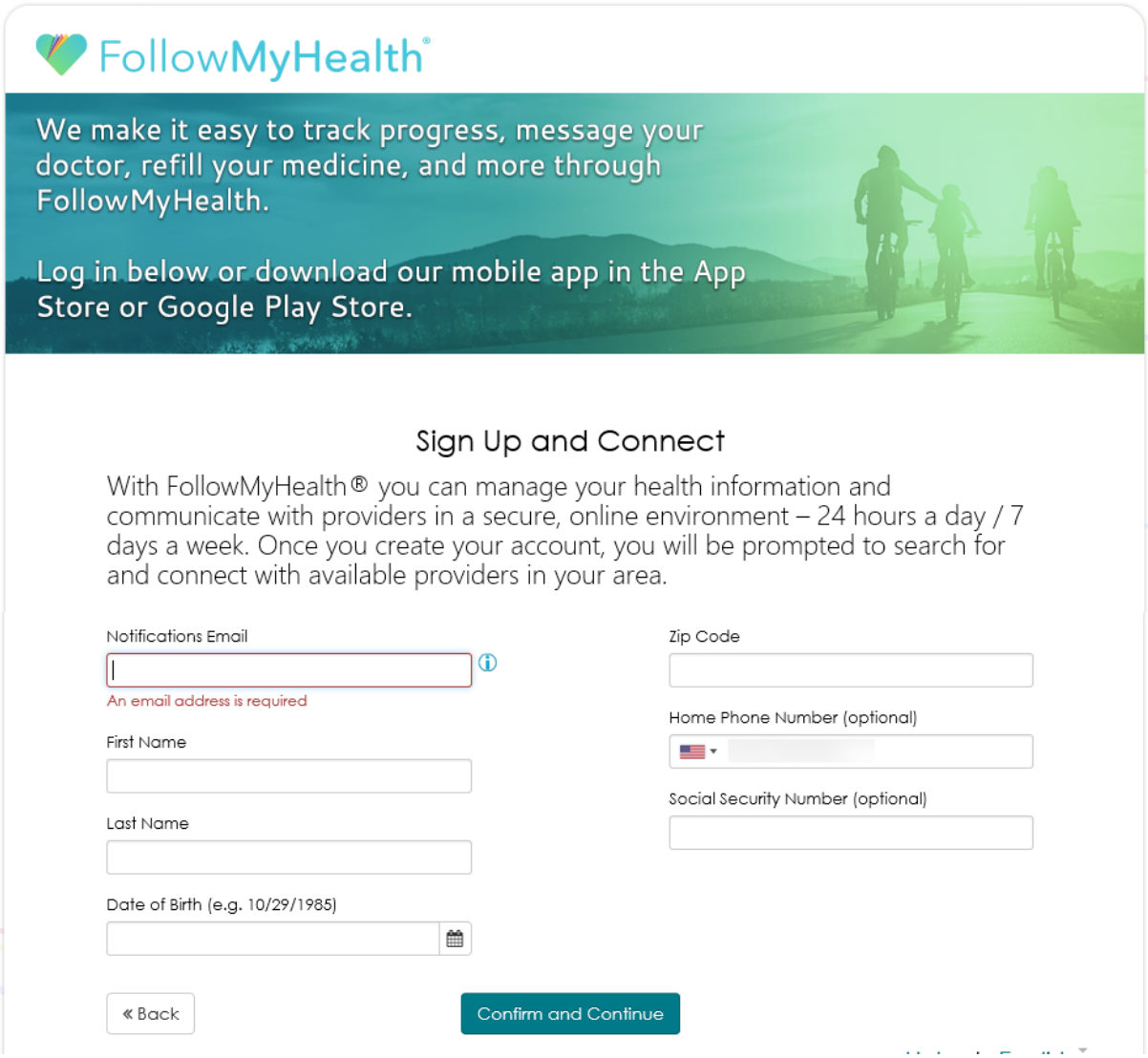


> **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign In** and **or, use an alternative**, and **I need to sign up** are always displayed.

2. Click **I need to sign up**.

   Sign Up and Connect is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. Enter the applicable information in the boxes.

Notifications Email

Specify an email address where you can receive notifications regarding your health record. This email address is also used for your user name. The **Create Username** box is automatically filled with email when you get to the step to create a user name and password.

After you create your account, this same email address is also listed under **My Info > Demographics > Contact Information**.

First Name

Specify the first name of the account holder.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Last Name

Specify the last name of the account holder.

Date of Birth

Specify the account holder's date of birth.

Zip Code

Specify the ZIP Code of the account holder.

Home Phone Number

Specify the home phone number of the account holder. Select the country code. Click the country drop-down list and select a country code represented by a flag. This is optional.

- +1 Canada
- +44 United Kingdom
- +1 United States

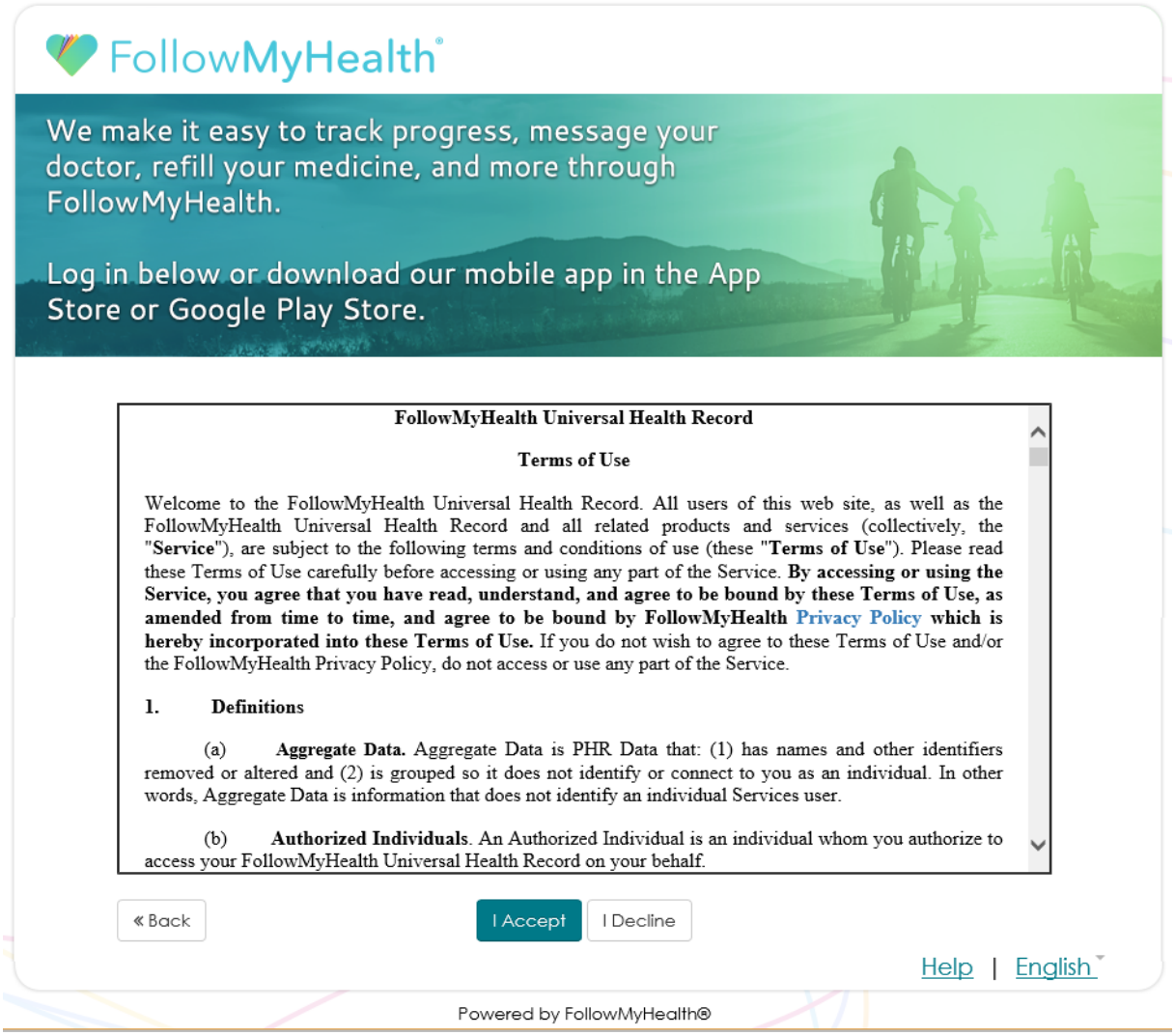
Social Security Number

Specify the Social Security number of the account holder. This is optional.

4. Click **Confirm and Continue**.

   FollowMyHealth Universal Record Terms of Use is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

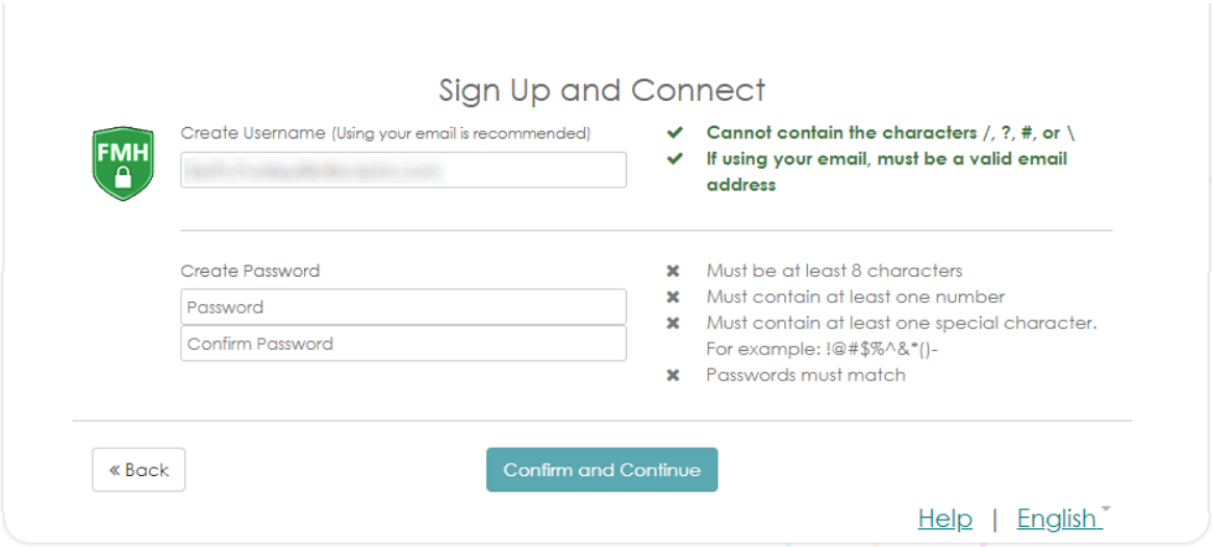


5. Read the terms of service and click **I Accept**.

> **Note:** You must accept the terms of service. You can also access the privacy policy on this step by clicking **Privacy Policy**.

Sign Up and Connect is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



6. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window.

   The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name.
   Your user name cannot contain the characters /, ?, #, or \.

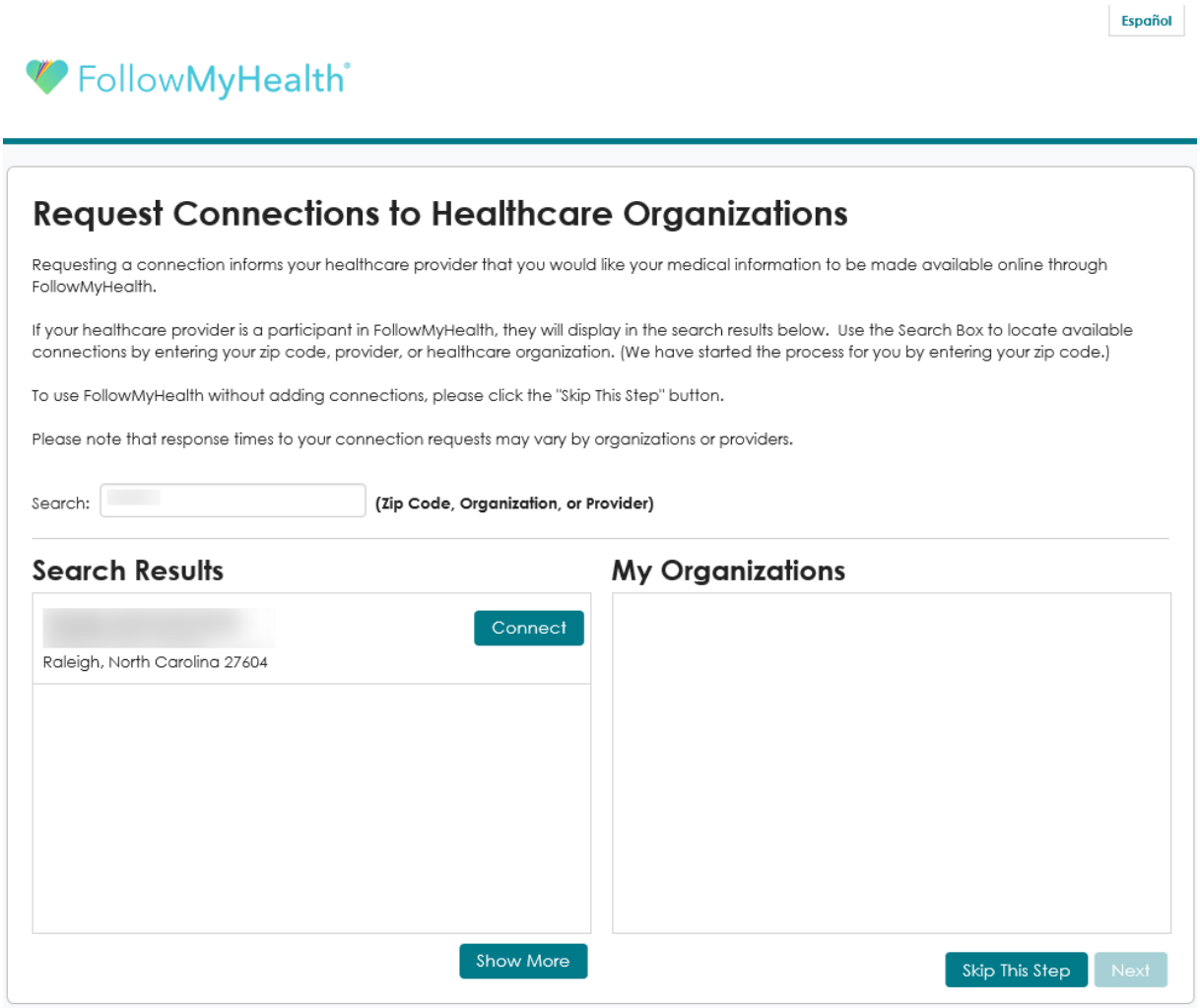
7. For **Password**, enter a password that meets the requirements listed on the right side of the window.
8. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

   > **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth account), the following error message is displayed: `Someone already has that user name. Please try a different one.` You must enter a new valid user name to proceed.

9. Click **Confirm and Continue**.

   Request Connections to Healthcare Organizations is opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



If you do not want to request connections, click **Skip This Step**. If you click **Skip This Step**, you are asked to verify that you do not want to search for connections and the patient portal **Home** tab is displayed.

Search is automatically filled based on the ZIP Code that you used on **Sign Up and Connect**. You can also search by organization or provider.

10. Click **Connect** adjacent to the organization that you want to connect to.

    The organization is listed in **My Organizations**.

    > **Note:** You can add multiple connections.

11. Click **Next**.

    Sign Release of Information Authorization is displayed.

    You must accept a release for each organization that you want to connect to.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

12 Click **I Accept**.

Your Connection Request is Pending is displayed.

> **Note:**
> The organization that you want to connect to might require patient identification verification. If the organization requires this verification, **Patient Identification Authorization** opens instead of **Your Connection Request is Pending**. Continue with the following steps to verify your identification. After the following steps are complete, **Your Connection Request is Pending** is displayed.
>
> 1. Click **I Agree** to authorize the organization to verify your identification. After you agree to the authorization, the text that is displayed under the date is saved as a document and sent to your health record and displayed in the **Documents** tab.
>
>   If you decline the authorization, you must confirm that you want to decline patient identification verification. If you accept the authorization, **Patient Identification** is displayed.
> 2. Enter the applicable information in the boxes.
>   Information that you provided on **Sign Up and Connect** is automatically filled on this window.
>
>   - **First Name**: Specify the first name of the account holder.
>   - **Last Name**: Specify the last name of the account holder.
>   - **Middle Name**: Specify the middle name of the account holder. This is optional.
>   - **Suffix**: Specify the suffix of the account holder. This is optional.
>   - **Date of Birth**: Specify the date of birth of the account holder.
>   - **Social Security Number**: Specify the Social Security number of the account holder. This is optional.
>   - **Email**: Specify the email address of the account holder. This is optional.
>   - **Primary Phone**: Specify the primary phone number of the account holder. This is optional. Select from **Home**, **Mobile**, **Work**, or **None**. If you select **Home** or **Mobile**, the phone number that you added on **Create an account** is automatically filled.
>   - **Street**: Specify the street number of the account holder.
>   - **City**: Specify the city of the account holder.
>   - **County**: Specify the county of the account holder.
>   - **ZIP Code**: Specify the ZIP Code of the account holder.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

3. Click **OK**.
   Questions opens.

   You must answer a series of questions. After you answer a question, click **Next** to open the next question. When you have answered the last question, **Finish** is available.
4. Click **Finish**.
   Your Connection Request is Pending is displayed.

13. Click **Continue**.

    The patient portal opens.

    The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your FollowMyHealth account contains only the demographics information that you provided when you created your account.

Results of this task
You created a new account and connected to an organization.

What to do next
View pending connections at **My Account > Connections**.

Create a new FollowMyHealth account and connect to another account as an authorized individual

If a patient, such as your child, elderly parent, or other dependent, requires an authorized individual, his or her provider can send an authorized individual email invitation to you so that you can create an account and connect to the patient's health record in FollowMyHealth.

Before you begin
The user name and password that you create are your FMH Sign In credentials. Best practice is to use this specific FollowMyHealth user name and password to sign in to your account. The FMH Sign In section is identified by the icon.

There are alternative sign in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated from these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in

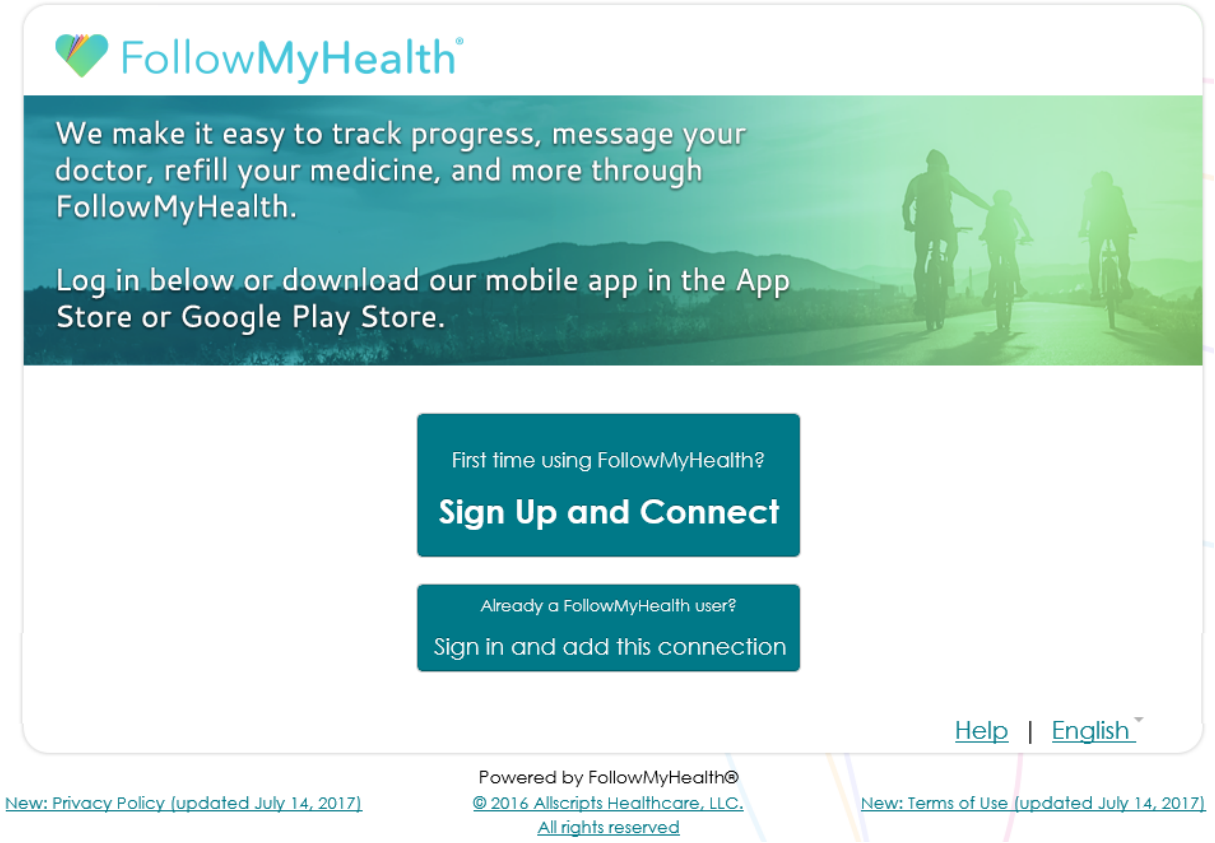
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

to FollowMyHealth. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

Your provider sends you an email invitation with a registration link to www.followmyhealth.com. The email invitation contains an individualized link to the FollowMyHealth sign-in window.

1. Go to the email Inbox that is associated with your patient portal account.
2. Find and open the patient portal email invitation sent by your provider or health care organization.
3. From the email, click the **Click here to become an Authorized User/Proxy** link.

   Sign Up and Connect is displayed.

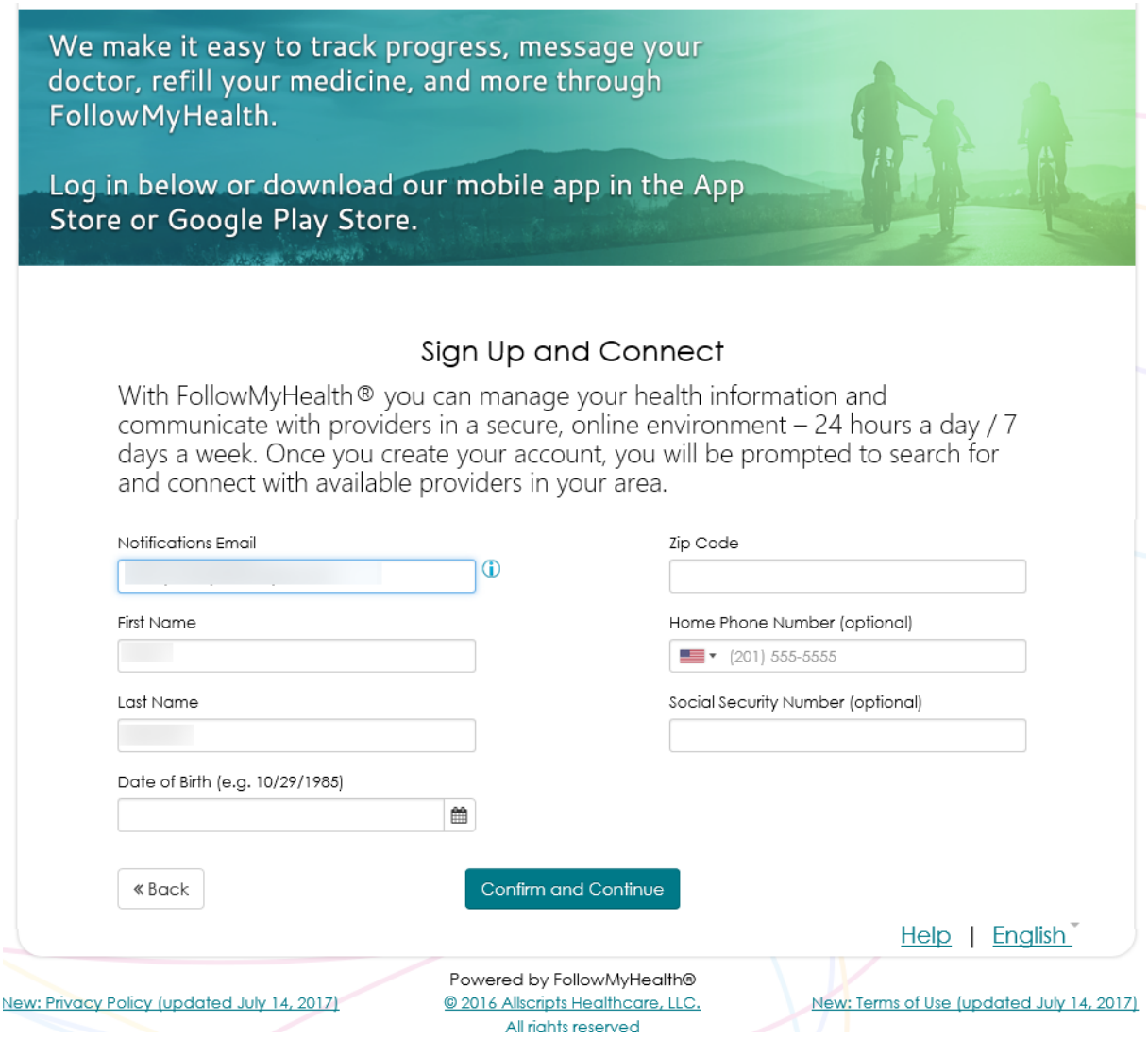


> **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign Up and Connect** and **Sign in and add this connection** are always displayed.

4. Click **Sign Up and Connect**.

   Sign Up and Connect is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Enter the applicable information in the boxes.

   Demographic information is automatically filled based on the information that your provider has recorded for you. Complete the empty boxes.

   Notifications Email

   Specify an email address where you can receive notifications regarding your health record. This email address is also used for your user name. The **Create Username** box is automatically filled with email when you get to the step to create a user name and password.

   After you create your account, this same email address is also listed under **My Info > Demographics > Contact Information**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

First Name
Specify the first name of the account holder.

Last Name
Specify the last name of the account holder.

Date of Birth
Specify the account holder's date of birth.

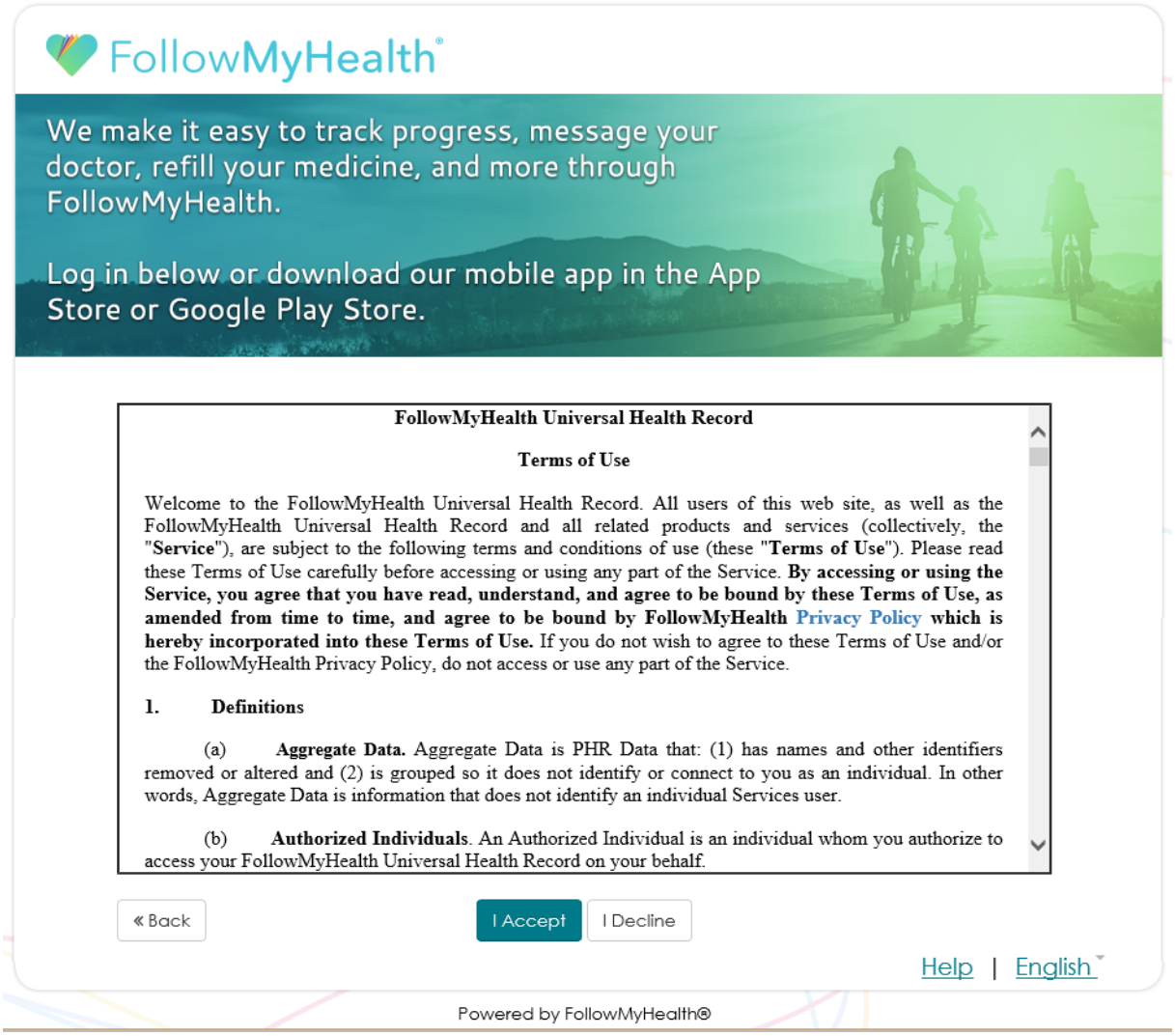
Zip Code
Specify the ZIP Code of the account holder.

Home Phone Number
Specify the home phone number of the account holder. This is optional.

Social Security Number
Specify the Social Security number of the account holder. This is optional.

6. Click **Confirm and Continue**.
FollowMyHealth Universal Record Terms of Use is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

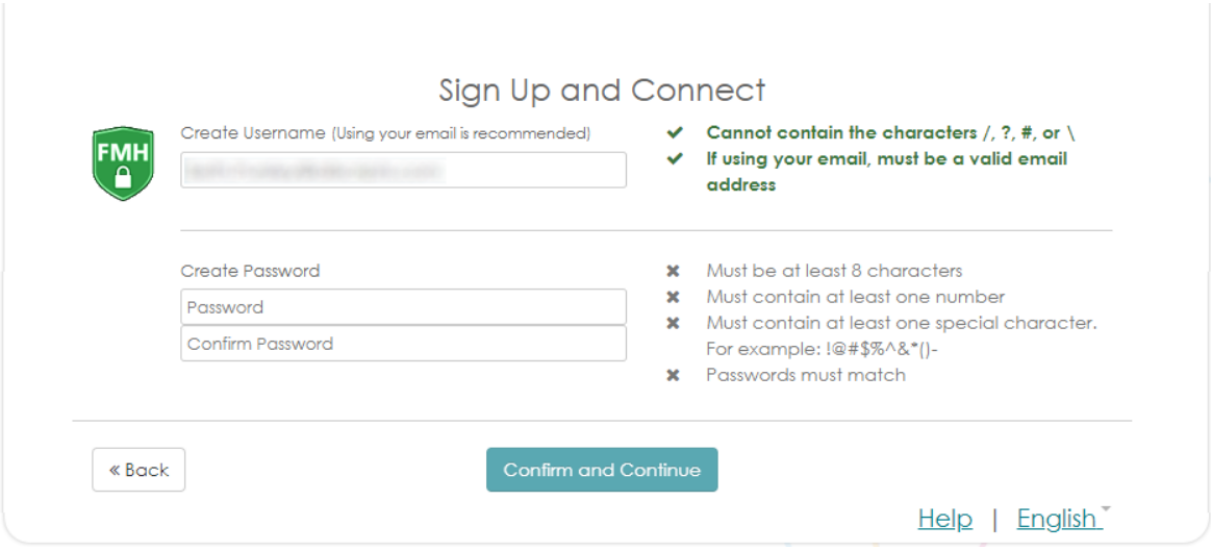


7. Read the terms of service and click **I Accept**.

> **Note:** You must accept the terms of service. You can also access the privacy policy on this step by clicking **Privacy Policy**.

Sign Up and Connect is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



8. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window.

   The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name.

   Your user name cannot contain the characters /, ?, #, or \.

   After you create your account, this email address is also listed under **My Info > Demographics > Contact Information**.

   > **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message indicating the guideline that was not followed is displayed in red bold font.

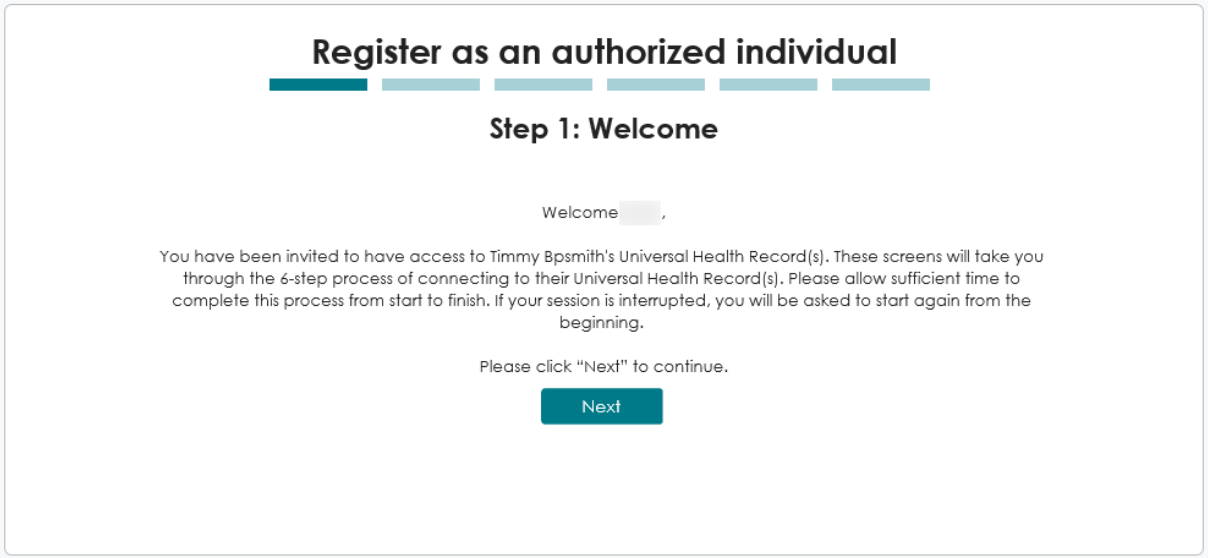
9. For **Password**, enter a password that meets the requirements listed on the right side of the window.
10. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

    > **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth account), the following error message is displayed: `Someone already has that user name. Please try a different one.` You must enter a new valid user name to proceed.

11. Click **Confirm and Continue**.

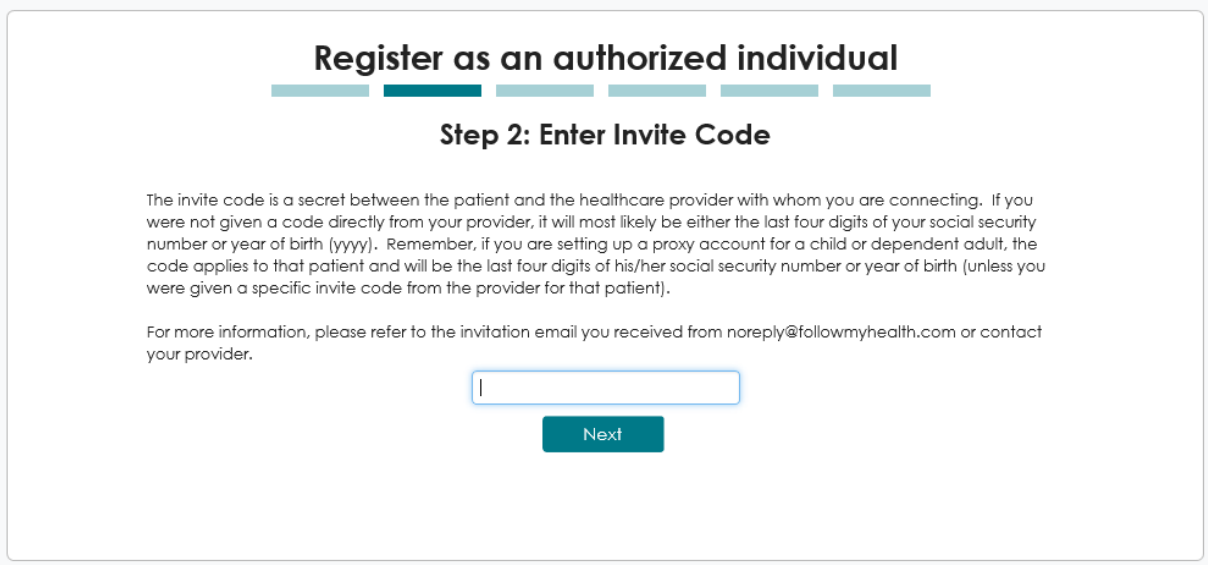
    The **Invite Wizard** starts and **Register as an authorized individual Step 1: Welcome** opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



12. Click **Next**.

    Register as an authorized individual Step 2: Enter Invite Code opens.



13. Enter the invitation code that you received when you requested authorized individual access and click **Next**.

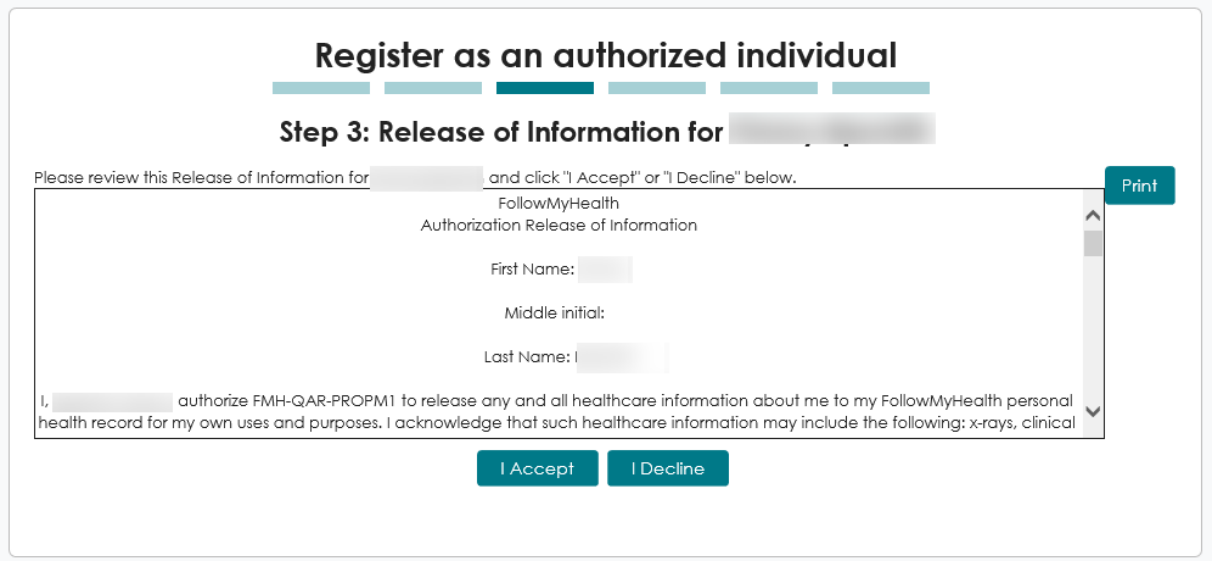
    The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** If you are setting up an authorized individual account for a child or dependent adult, the code applies to that patient and is the last 4 digits of his or her Social Security number or birth year.

Register as an authorized individual Step 3: Release of Information for opens.

> **Note:** The Release of Information step is only presented the first time you register as an authorized individual for a patient. All subsequent authorized individual registrations are not presented with this step.



You must accept the ROI when you initiate the first connection with FollowMyHealth.

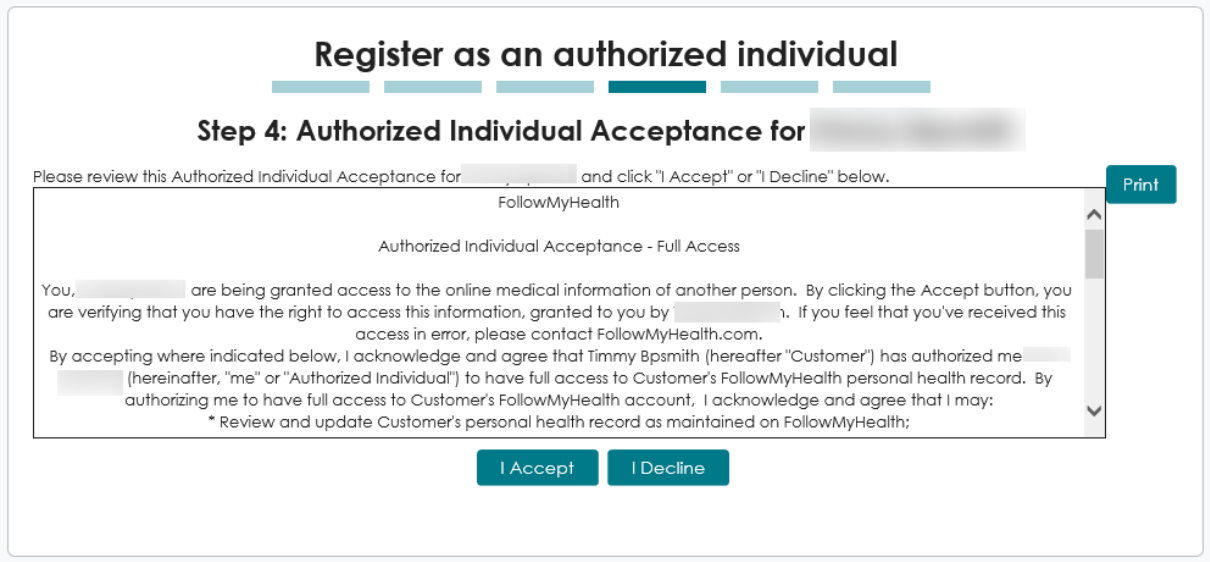
The ROI permits FollowMyHealth to obtain and store the medical information for the patient that you are authorized individual for. If you decline, you are not connected to the organization, you cannot view the patient's medical information from that organization, and you cannot interact with the patient's providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth and the ROI is expired, **Release of Information** opens. You must click **I Accept** to renew the ROI and stay connected to the organization and continue to view your medical information. If you click **I Decline**, a confirmation window opens where you must confirm that you want to decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

14. Click **I Accept** to release your healthcare record.

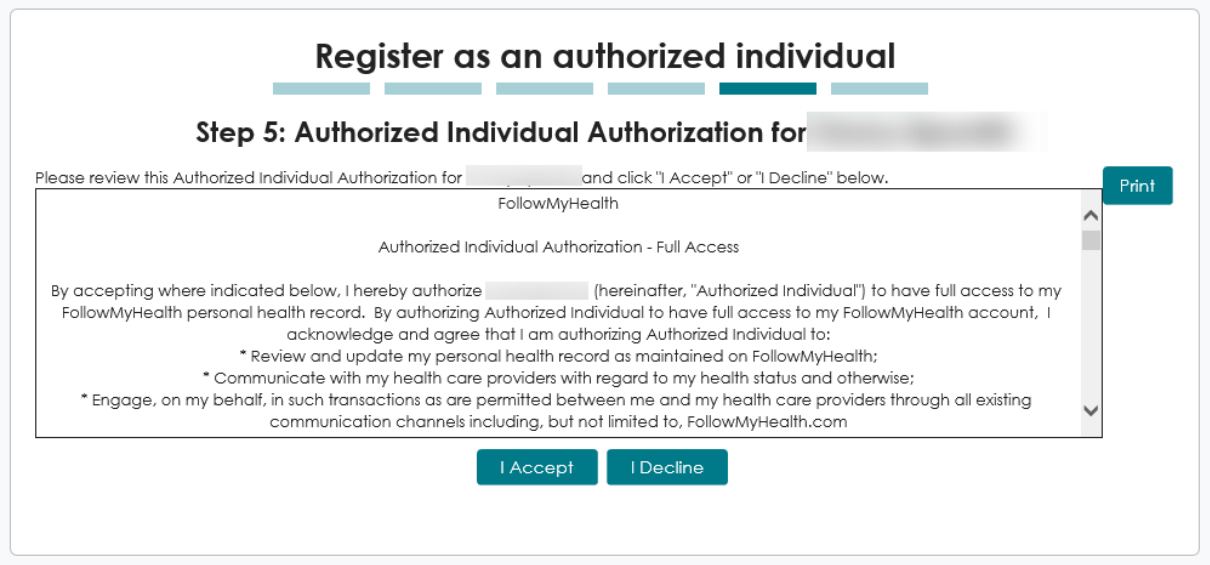
    Register as an authorized individual Step 4: Authorized Individual Acceptance for is displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



15. Click **I Accept**.

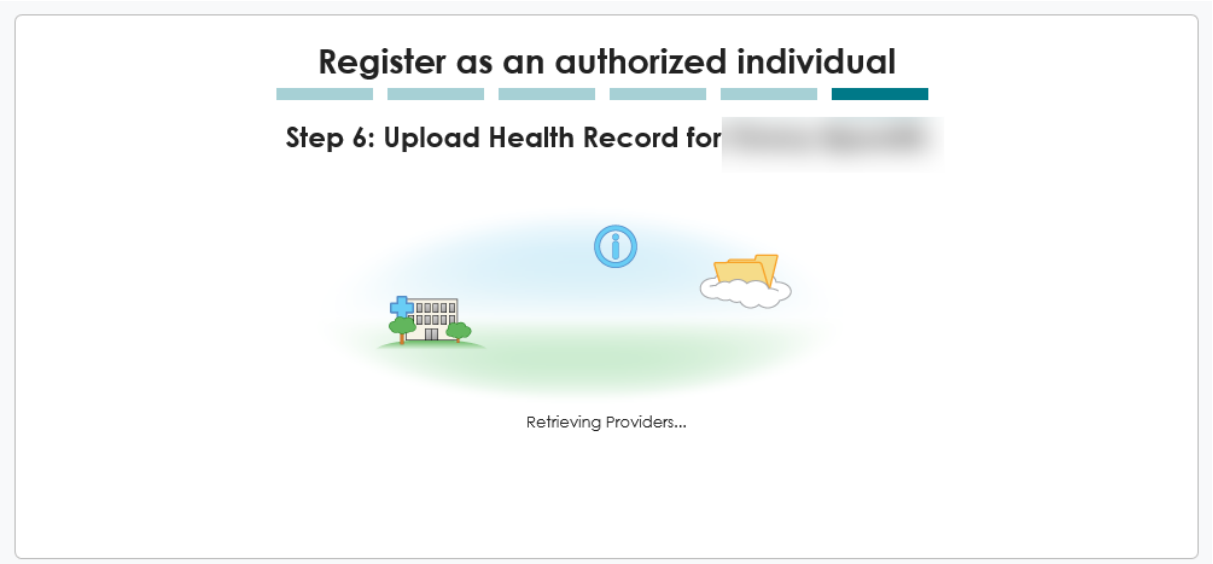
    Register as an authorized individual Step 5: Authorized Individual Authorization for opens.



16. Click **I Accept**.

    Register as an authorized individual Step 6: Upload Health Record for is displayed and the patient's health record is uploaded to your FollowMyHealth account.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



When the application has retrieved the patient's health record, the patient portal opens.

17. Click **Hello *Your Name*** in the static toolbar.

    A list of names is displayed that you are an authorized individual for. You can also view action items for the patient in **Action Center**.

18. Click the name of the account holder that you are an authorized individual for.

    The patient's FollowMyHealth account opens.

Results of this task

You created a new account and connected to another account as an authorized individual.

What to do next

View pending connections at **My Account > Connections**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 4

Sign in as an existing user

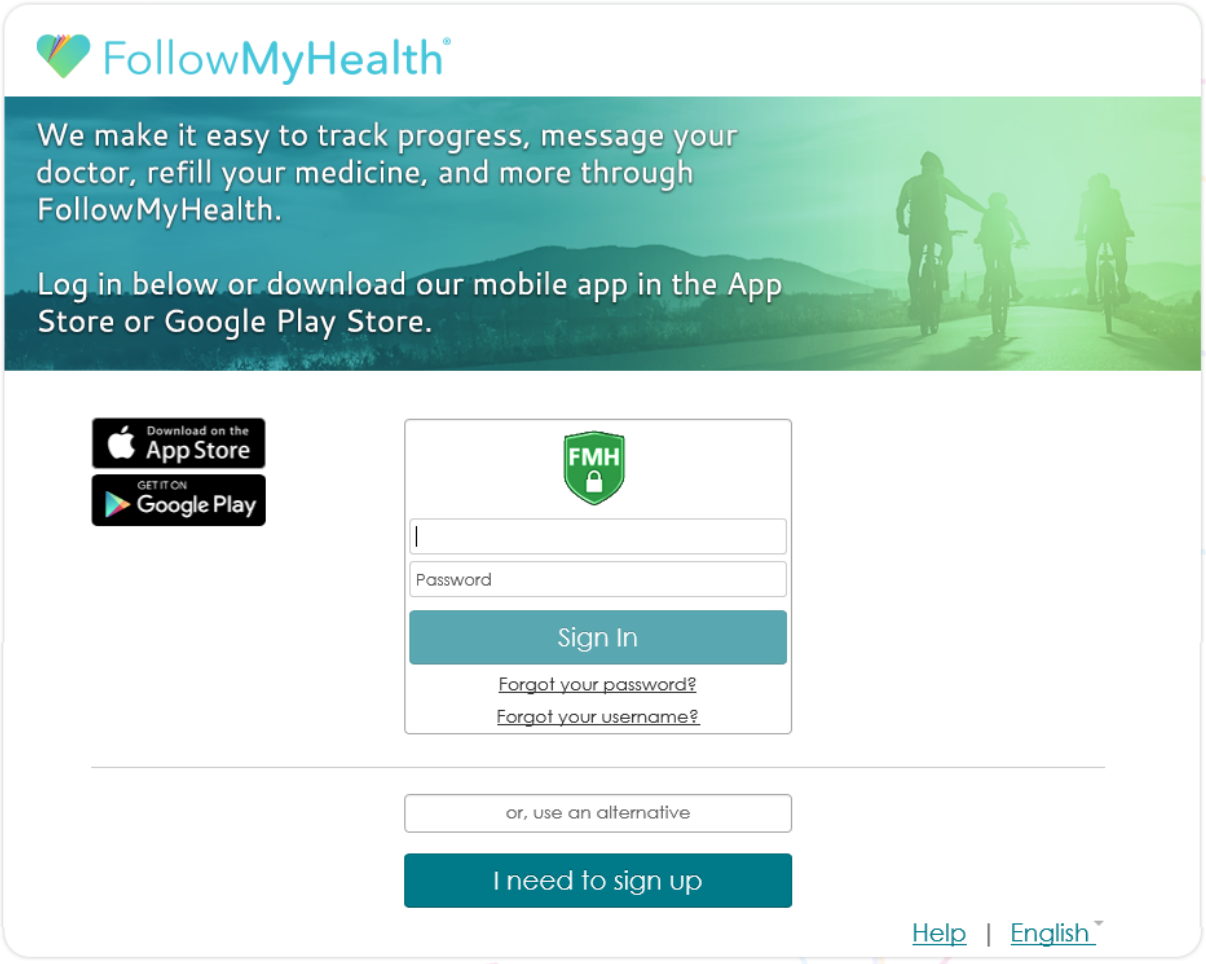
Sign in as an existing user with an alternative authentication method

It is best practice to use the FMH Sign In authentication method for signing in to the patient portal, but if you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated with these accounts. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to FollowMyHealth. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

1. Access your provider's patient portal sign-in window in 1 of 2 ways.
   - > Use the URL provided by your provider.
   - > Use the default FollowMyHealth URL at https://www.followmyhealth.com/patientaccess.

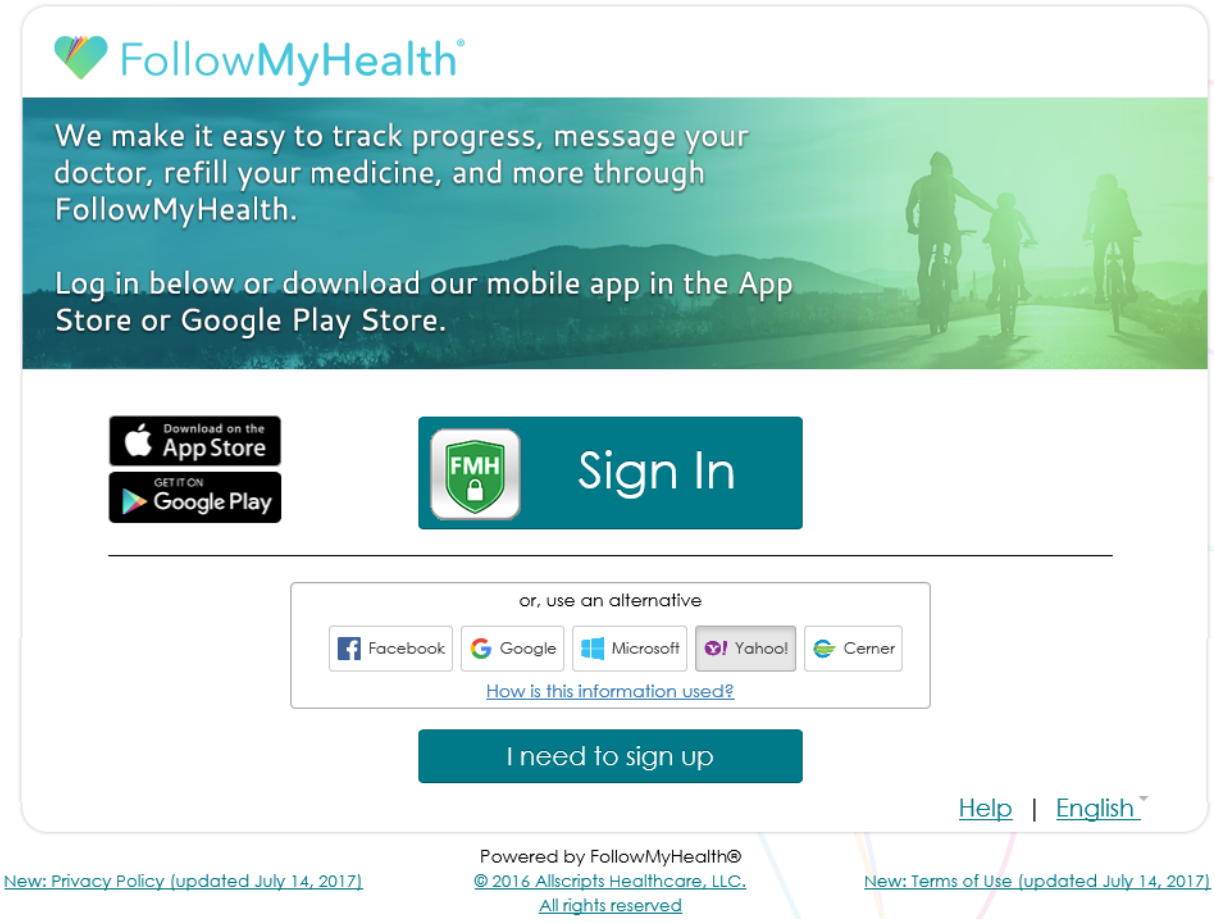
   The FollowMyHealth sign-in window is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



2. Click **or, use an alternative**.
   The icons for the alternative sign in methods are displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



> **Note:** Your most recent authentication method is retained. If you sign in using an alternative method, the next time that you sign in, the alternative option is automatically displayed as the default sign-in method. If you sign in using FMH Sign In, the next time that you sign in, the FMH Sign In option is automatically displayed as the default sign-in method.

3. Click your preferred authentication method.

   A message is displayed to inform you that you are first directed to the third party authentication window to sign in and then redirected back to FollowMyHealth.

4. Click **OK**.

   The alternative authentication window is displayed.

5. Enter your user name and password and sign in.

   The patient portal opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

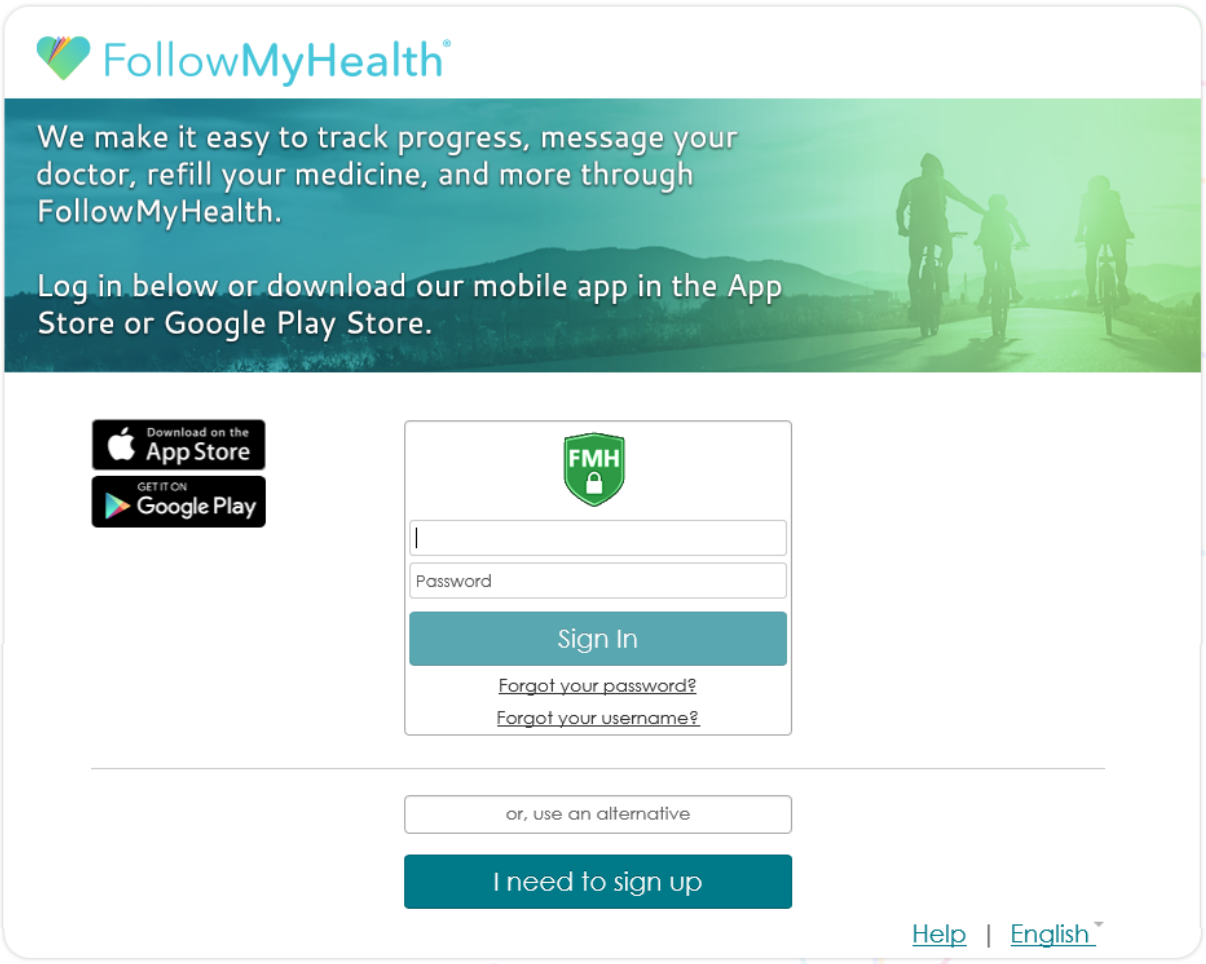
You have signed in as an existing user with an alternative authentication method.

Sign in as an existing user with FMH Sign In

You can sign in to the patient portal as an existing user after you have registered and have a user name and password.

1. Access your provider's patient portal sign-in window in 1 of 2 ways.
   - > Use the URL provided by your provider.
   - > Use the default FollowMyHealth URL at https://www.followmyhealth.com/patientaccess.

   The FollowMyHealth sign-in window is displayed.



2. Enter your FMH Sign In user name and password.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

3. Click **Sign In**.

   The patient portal opens.

Results of this task

You have signed in as an existing user with FMH Sign In.

Connect your existing account to a new organization or to an authorized individual

If you are an existing user, you can connect your account to a new organization or connect your account to another account as an authorized individual.

Review the following scenarios and select the scenario that fits your situation. Each scenario includes step-by-step instructions to connect your existing account.

> Connect your existing FollowMyHealth account to a different organization through an email invitation.
> Connect your existing FollowMyHealth account to another account as an authorized individual through an email invitation.

Connect your existing FollowMyHealth account to a different organization through an email invitation

If another provider or organization has sent you an email to connect to FollowMyHealth, but you already have an existing FollowMyHealth account, you can connect your existing account to the new organization.

Before you begin

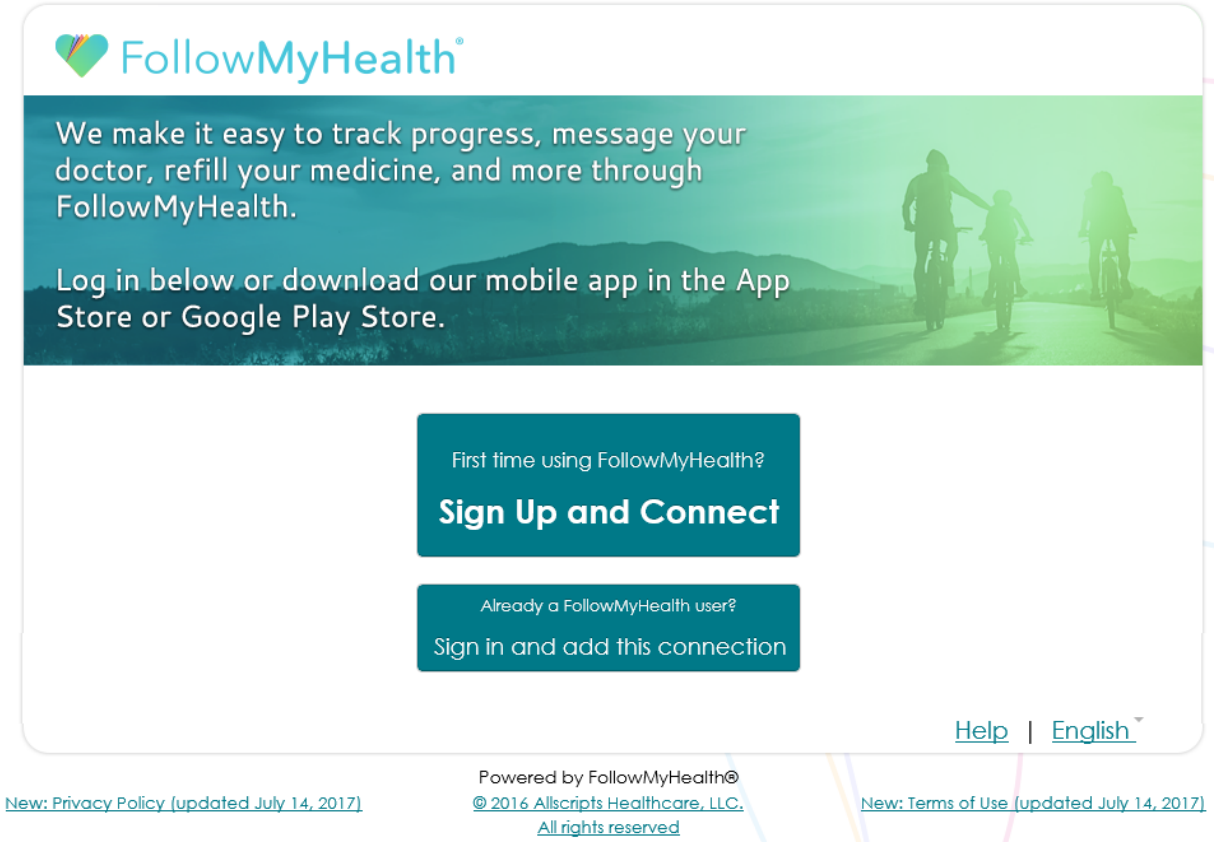
You must have an email invitation from the organization to join the patient portal. Your organization sends you an email invitation with a registration link to www.followmyhealth.com. The individualized link opens the FollowMyHealth sign-in window.

This process connects your existing FollowMyHealth account with a new organization. Information from this organization is then available in your FollowMyHealth account.

1. Go to the email Inbox that is associated with your patient portal account.
2. Find and open the patient portal email invitation sent by your provider or health care organization.
3. From the email, click the **Click here to begin registration** link.

   The FollowMyHealth sign-in window for new connections opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



> **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign Up and Connect** and **Sign in and add this connection** are always displayed.

4. Click **Sign in and add this connection**.
   The organization's sign-in window opens.
5. Enter your existing FollowMyHealth account credentials.

> **Note:** The date of birth is validated when you sign in. If the date of birth associated with the account credentials entered does not match the date of birth associated with the account that you want to connect to, **Date of Birth Does Not Match** opens. You must ensure that the data of birth matches on both accounts to prevent your health record from uploading to an account that does not belong to you.

6. Click **Confirm and Continue**.
   The **Invite Wizard** starts and **Connect your account Step 1: Welcome** opens.
   The progress bar represents the step you are on in the account connection process.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

7. Click **Next**.

   Connect your account Step 2: Enter Invite Code opens.

8. Enter the invitation code that you received in the invitation email and click **Next**.

   > **Note:** The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization who invited you.

   Connect your account Step 3: Release of Information opens.

   The release of information (ROI) permits FollowMyHealth to obtain and store your medical information from the organization. If you decline, you are not connected to the organization, cannot view your medical information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.

   The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth and the ROI is expired, **Release of Information** opens. You must click **I Accept** to renew the ROI and stay connected to the organization and continue to view your medical information. If you click **Decline**, a confirmation window opens where you must confirm that you want decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

9. Click **I Accept** to release your healthcare record to FollowMyHealth.

   Connect your account Step 4: Upload Health Record is displayed.

   This window displays the progress of retrieving data from the organization. Monitor the progress to ensure the data is uploaded successfully.

Results of this task

You have connected your existing FollowMyHealth account to a different organization through an email invitation

When the upload is complete, your account is connected to FollowMyHealth and the patient portal opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Connect your existing FollowMyHealth account to another account as an authorized individual

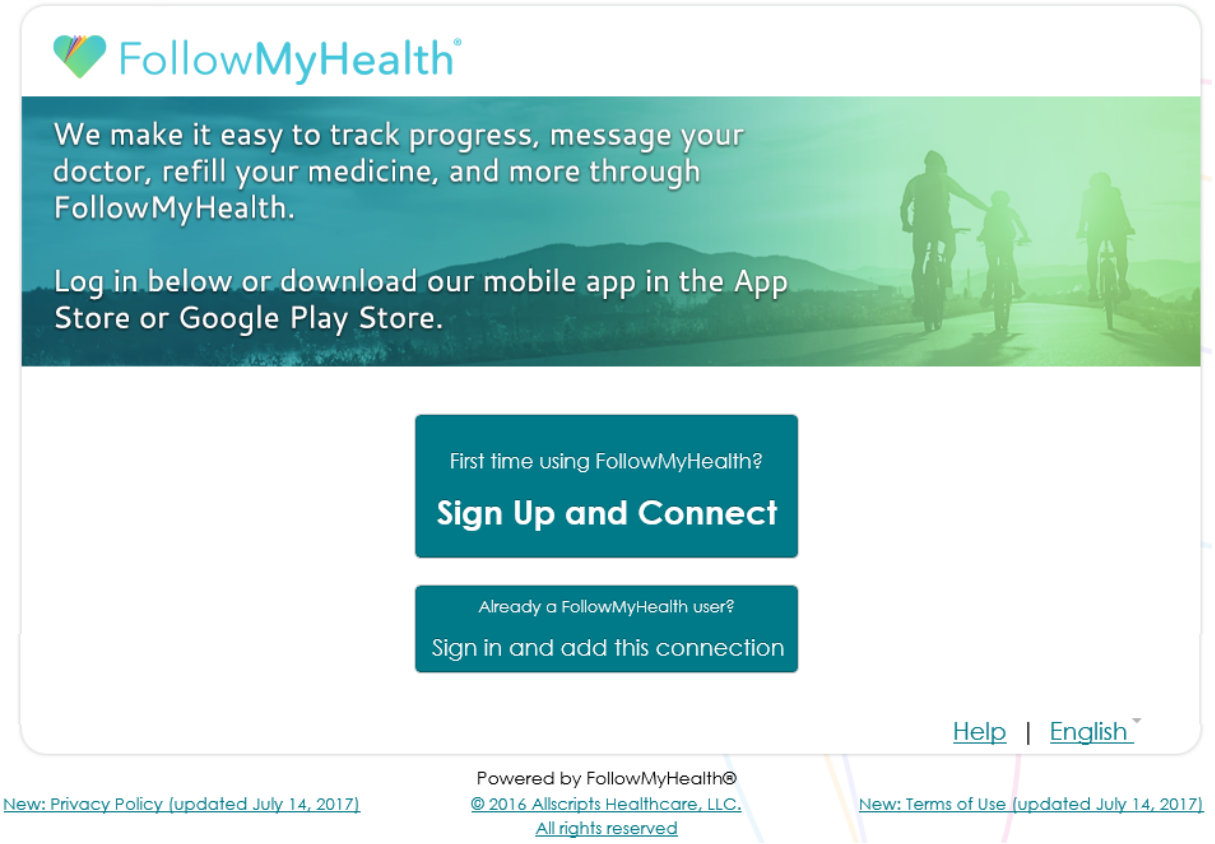
If a patient, such as your child, elderly parent, or other dependent, requires an authorized individual, their health care organization can send an authorized individual email invitation to you so that you can connect your account with the patient's health record in FollowMyHealth.

Before you begin

Your organization sends you an email invitation with a registration link to www.followmyhealth.com. The individualized link opens the FollowMyHealth sign-in window.

1. Go to the email Inbox that is associated with your patient portal account.
2. Find and open the patient portal email invitation sent by your provider or health care organization.
3. From the email, click the **Click here to become an Authorized User/Proxy** link.

   The FollowMyHealth sign-in window for new connections is displayed.



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign Up and Connect** and **Sign in and add this connection** are always displayed.

4. Click **Sign in and add this connection**.

   Sign In and Connect is displayed.

   > **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message indicating the guideline that was not followed is displayed in red bold font.

5. Enter your existing FollowMyHealth account credentials and click **Confirm and Continue**.

   The **Invite Wizard** starts and **Register as an authorized individual Step 1: Welcome** is displayed.

6. Click **Next**.

   Register as an authorized individual Step 2: Enter Invite Code opens.

7. Enter the invitation code that you received when you requested authorized individual access and click **Next**.

   > **Note:** If you are setting up an authorized individual account for a child or dependent adult, the code applies to that patient and is the last 4 digits of their Social Security number or birth year.

   Register as an authorized individual Step 3: Release of Information is displayed.

   > **Note:** The Release of Information step is only presented the first time you register as an authorized individual for a patient. All subsequent authorized individual registrations are not presented with this step.

   You must accept the release of information (ROI) when you initiate the first connection with FollowMyHealth.

   The ROI permits FollowMyHealth to obtain and store the medical information for the patient that you are authorized individual for. If you decline, you are not connected to the organization, you cannot view the patient's medical information from that organization, and you cannot interact with the patient's providers at the organization through email messages, appointment requests, and renewal requests.

   The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth and the ROI is expired, **Release of Information** opens. You must tap **I Accept** to renew the ROI and stay connected to the organization and continue to view your medical information. If you tap **Decline**,

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

a confirmation window opens where you must confirm that you want to decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

8. Click **I Accept** to release your healthcare record.

   Register as an authorized individual Step 4: Authorized Individual Acceptance is displayed.

9. Click **I Accept**.

   This acceptance indicates what access is authorized for the authorized individual.

   Register as an authorized individual Step 5: Upload Health Record opens and the patient's health record is uploaded to your FollowMyHealth account.

   When the application has retrieved the patient's health record, the patient portal opens.

10. Click **Hello *Your Name*** in the static toolbar.

    A list of names is displayed.

11. Click the name of the account holder that you are an authorized individual for.

    The patient's FollowMyHealth account opens.

Results of this task

You have connected your existing FollowMyHealth account to another account as an authorized individual.

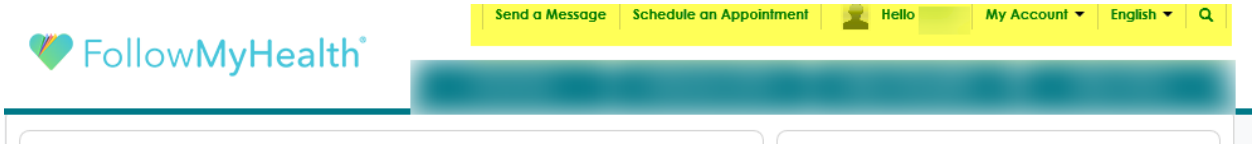
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 5

Static toolbar

The static toolbar is available from all FollowMyHealth windows and tabs.

Figure 1: Static toolbar



You can compose email messages, request appointments, view the signed-in user or authorized individual, access **My Account** and **My Info**, change the portal language, and search from the static toolbar.

Send a Message

Compose a secure FollowMyHealth message to any connected provider who has enabled messaging. This label is not displayed if you are not connected to a provider who has enabled messaging.

Schedule an Appointment

Request or directly schedule an appointment with any provider who has enabled online appointment requests. This label is not displayed if you are not connected to a provider who has enabled online appointments.

Hello

Displays who is signed in to FollowMyHealth. You can use the list to access authorized individual accounts assigned to you.

My Account

Configure connections to providers, billing, and preferences; sign out from the application; and find Support and Help information. You can access **My Info** from **My Account**, where demographic, insurance, emergency contact, and other account information is stored.

English

Toggle between **English** or **Español** to change the user interface to language.

Search

Click the **Search** icon to search all tabs in FollowMyHealth.

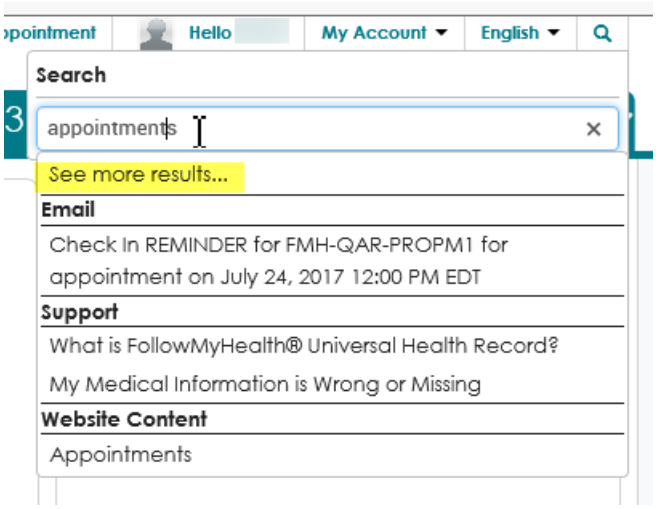
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Search the patient portal

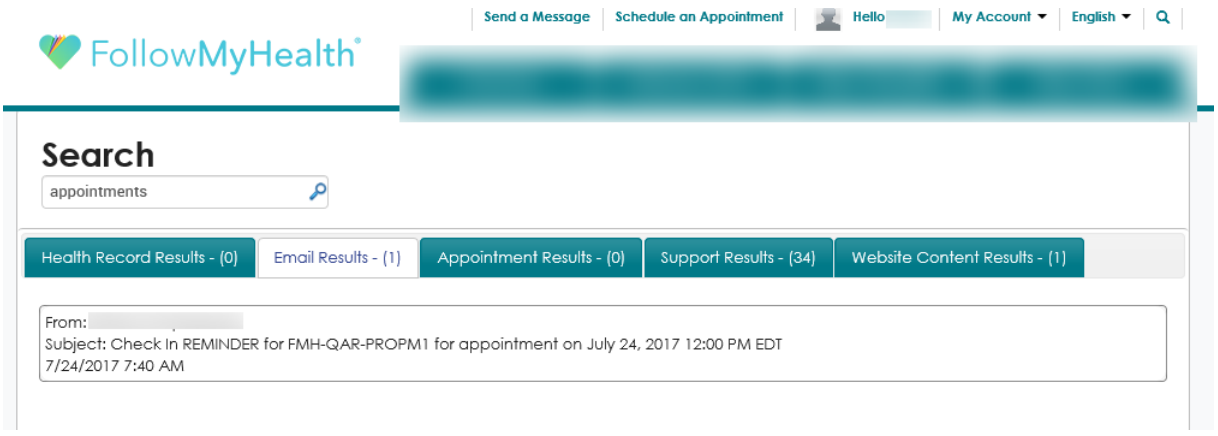
You can search all tabs and windows in your health account by using the search icon located in the static toolbar. Searching with the search mechanism is more efficient than manually searching each window for clinical results or information.

Search features a quick list option or you can open the **Search** window for results.

1. Sign in to the patient portal.
2. From the static toolbar, click .
   A quick list is returned for results or you can click **See more results**.



3. Click **See more results**.
   Search opens.



The additional search results are organized in a tabs.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

4. Select the result description box to open details about the item.

   If the item is a clinical item, an edit window opens where you can edit the item. If the item is an email, the Inbox opens with the specific email displayed, and so on.

Results of this task

You have used the search icon to find results and information in your health account.

My Account

You can manage account connections, billing, and **My Info** preferences from **My Account** on the static toolbar.

You can also access Support and Help, and sign out of the patient portal from **My Account**.

Manage Connections

You can manage connections to organizations, providers, authorized individuals, and devices and applications.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

   Connections are divided into categories, including connections with clinicians and organizations, connections with applications and devices through **Devices & Applications**, and connections with family members and dependents.
3. Click **Visualize Connections** to view the details about each connection.

   Visualize Connections opens.

   Your healthcare organizations, as known by FollowMyHealth, are displayed in and interactive graph on **Visualize Connections**. You are represented by your picture in the center of the graph. The healthcare organizations that you are connected to, authorized individual (proxy connections) representation, and clinical settings star burst from your photo.

   Click the various icons in the graph, such as **Proxies for Me**, **Hospitals**, **Schools**, **Devices & Apps**, **Clinics**, and so on, to open **Connection Details** for the respective connection type.

   Click **Re-Center Graph** to go back to the center of the graph.
4. To remove a connection, click the organization on the interactive graph.

   The organization details is displayed in **Connection Details**.
5. Click the icon to remove the organization connection.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

A confirmation message is displayed.

6. Click **Yes** to delete the connection.

Add a connection to an organization

You can add a connection to an organization from **My Account > Connections**. When you are connected to an organization, the results and information from your visits are available in your patient portal health account.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click **Add Organization**.

   Organization Search opens.
4. For **Search**, enter your ZIP Code, organization, or provider.

   Search results are displayed in **Organization Search**.
5. To narrow the search results, for **Distance in Miles**, enter the number of miles from the ZIP Code that you want to search, or select the type of organization from **Organization Type**.
6. Select an organization from the search results.
7. Click **Connect**.

   Release of Information Authorization opens.
8. Click **I Accept**.

   Your Connection Request is Pending is displayed.

> **Note:**
> The organization that you want to connect to might require patient identification verification. If the organization requires this verification, **Patient Identification Authorization** opens instead of **Your Connection Request is Pending**. Continue with the following steps to verify your identification. After the following steps are complete, **Your Connection Request is Pending** is displayed.
>
> 1. Click **I Agree** to authorize the organization to verify your identification. After you agree to the authorization, the text that is displayed under the date is saved as a document and sent to your health record and displayed in the **Documents** tab.
>
>   If you decline the authorization, you must confirm that you want to decline patient identification verification. If you accept the authorization, **Patient Identification** is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

2. Enter the applicable information in the boxes.
   Information that you provided on **Sign Up and Connect** is automatically filled on this window.
   - **First Name**: Specify the first name of the account holder.
   - **Last Name**: Specify the last name of the account holder.
   - **Middle Name**: Specify the middle name of the account holder. This is optional.
   - **Suffix**: Specify the suffix of the account holder. This is optional.
   - **Date of Birth**: Specify the date of birth of the account holder.
   - **Social Security Number**: Specify the Social Security number of the account holder. This is optional.
   - **Email**: Specify the email address of the account holder. This is optional.
   - **Primary Phone**: Specify the primary phone number of the account holder. This is optional. Select from **Home**, **Mobile**, **Work**, or **None**. If you select **Home** or **Mobile**, the phone number that you added on **Create an account** is automatically filled.
   - **Street**: Specify the street number of the account holder.
   - **City**: Specify the city of the account holder.
   - **County**: Specify the county of the account holder.
   - **ZIP Code**: Specify the ZIP Code of the account holder.
3. Click **OK**.
   Questions is displayed.

   You must answer a series of questions. After you answer a question, click **Next** to open the next question. When you have answered the last question, **Finish** is available.
4. Click **Finish**.
   Your Connection Request is Pending is displayed.

9. Click **Continue**.

Results of this task

You added a connection to a new organization.

The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your patient portal account contains only the demographics information that you provided when you created your account.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

What to do next

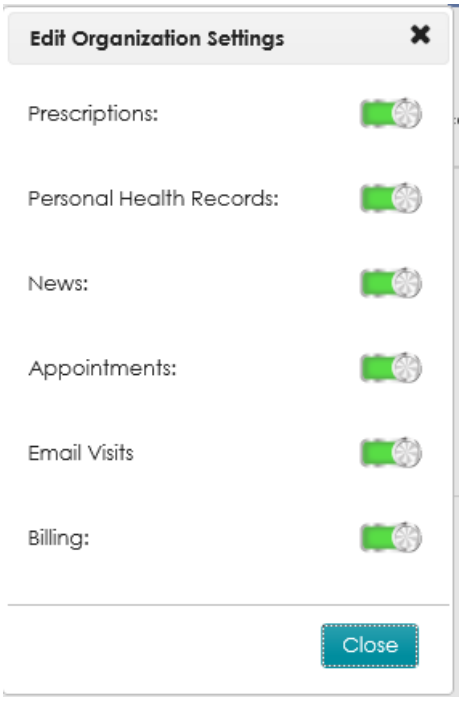
View pending connections at **My Account > Connections**.

Configure organization clinic settings

You can manage connections to organizations and clinic settings associated with the organization. For example, if you do not want to receive specific types of clinical results from an organization, you can turn off the clinical settings for that organization.

The settings include prescriptions, personal health records, news, appointments, and billing.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.
   Connections opens.
3. Click **With Providers and Healthcare Organizations**.
   A list of connections and pending connections are displayed in the tab.
4. Click the organization name that you want to edit.
   Edit Organization Settings opens.



Turn on and off clinic settings that you want to include in your connection by clicking .

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Attention:** Your organization has the option to turn on or off a preference that enables your provider from displaying in **With Providers and Healthcare Organizations**. However, you are still able to send the clinician messages and schedule appointments if those services are enabled for the provider.

5. Click **Close**.

Results of this task

You configured the clinical settings that you want to receive from your organization.

View providers

Providers that you have a connection with are displayed in **Connections** if the organization enables the provider names to display. You can then perform tasks from the provider's information section, such as schedule an appointment, renew a prescription, or request a consultation.

Your organization might choose not to display the provider names. In this scenario, you can view only the organizations that you have a connection to.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click **With Providers and Healthcare Organizations**.

   Your organization connections are displayed. If the organization has configured the patient portal to display provider names and information, the provider names are displayed.
4. Click **What do you want to do?** to view the tasks that can do from the provider details.

   Select from the following tasks:

   - **Schedule an Appointment**
   - **Renew a Prescription**
   - **Request an Email Visit**
   - **Request a Referral**
   - **Send a Message**
   - **Send Profile to a Friend**

> **Note:** The tasks available depend on the preferences that your provider has enabled. Providers can turn on an off preferences that enable you to send messages, schedule appointments, renew prescriptions, and so on.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

5. Click **Additional Providers** to see all other providers that are associated with an organization.

   The **Additional Providers** link always displays if there are additional providers for the organization that the you are not associated with, but the providers are accepting appointment requests from new patients.

Results of this task

You viewed the providers in your organization and the tasks available to interact with your provider.

Send a provider profile

You can share a provider profile as a way to refer your provider to family and friends.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click the **With Providers and Healthcare Organizations** tab.
4. From **What do you want to do**, select **Send Profile to a Friend**.

   Share Provider Profile opens.
5. Enter the email address of the person that you want to send the profile to, a subject, and message.
6. Click **Send**.

   Email Confirmation opens.
7. Click **OK**.

Results of this task

An email that includes the provider profile is sent. A copy of the message is displayed in the **Sent** folder in your **Inbox** tab.

Add an authorized individual to access your account

You can invite another person to access your health account by using the **Add Authorized Individual** process from the patient portal.

If you want to be an authorized individual for another patient, they must invite you from their own patient portal account, or the healthcare organization must send you an authorized individual invitation email on behalf of that patient. To request authorized individual access to a minor, contact your child's healthcare organization.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Connections opens.

3. Click **With Family Members, Dependents**.

   With Family Members, Dependents is displayed.

4. Click **Add Authorized Individual**.

   Add Authorized Individual is displayed.

5. Enter information for **First Name**, **Last Name**, **Relationship to You**, **Email Address**, **Invitation Code**, and select an access level.

   If you want the authorized individual to have full access to your health account, including view your information, enter new data, delete data, or send secure messages to your providers on your behalf, click **Full Access Proxy**. If you want the authorized individual to be able to only view your account, click **Read Only Proxy**.

   > **Important:** The security code is required for your authorized individual to accept the invitation. Make sure to remember the security code so that you can provide it for the person you are inviting.

6. Click **Send Invite**.

   Invitation Confirmation opens and you can confirm that you want to send an authorized individual invitation.

7. Click **OK** to send the authorized individual invitation.

Results of this task

You have sent an invitation to an individual who can complete the authorized individual invitation process and access your health account.

Manage billing

You can manage billing for multiple providers, including paying invoices, viewing pending insurance submissions, and viewing paid invoices.

The following sections are available in **Billing**.

- **Ask A Billing Question**
  If your provider supports billing questions, **Ask a Billing Question** is displayed.
- **Patient Responsibility**
  Displays the invoices that you owe the organization. The list format includes date of service, invoice number, provider, procedures, charges, and amount due.
- **Pending with Insurance**
  Displays the invoices that have been submitted to insurance.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Paid Invoices**
Displays invoices that have been paid in full.

Viewing your invoices

If your provider supports billing payments, you can pay your invoices from the patient portal account.

There are several ways to view your invoices.

> From **Billing** on the **Home** tab.
> From **Action Center** on the **Home** tab.
> From **My Account > Billing** on the static toolbar.

View your invoices from Billing on the Home tab

You can view and access the invoices that you are responsible for paying from the **Billing** section on the patient portal **Home** tab.

1. Sign in to the patient portal.
2. From the **Home** tab, scroll down to the **Billing** section at the bottom right.
   Your open invoices are listed in the **Billing** section by billing group.
3. Click **Details** next to the invoice that you want to view.
   The **Billing** page for the billing group that is connected to the invoice opens with **Patient Responsibility** expanded.
4. To view more details about the procedures that you were invoiced for, click the link in the **Procedure** column.
   Procedure is displayed. The type of office visit, lab work, and other tests are displayed in a list.

Results of this task

You have opened **Billing** and viewed your invoice.

What to do next

Pay your invoice.

View your invoices from Action Center

You can access and view your unpaid invoices from **Action Center** on the patient portal **Home** tab.

1. Sign in to the patient portal.
2. From the **Home** tab, go to **Action Center**.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

3. Click the unpaid invoices notification in **Action Center**.

   Unpaid Invoices opens.

4. Select the invoice that you want to view.

   The **Billing** page for the billing group that is connected to the invoice opens with **Patient Responsibility** expanded.

5. To view more details about the procedures that you were invoiced for, click the link in the **Procedure** column.

   Procedure opens. The type of office visit, lab work, and other tests are displayed in a list.

Results of this task

You have opened **Billing** and viewed your invoice.

What to do next

Pay your invoice.

View your invoices from My Account

You can access and view your invoices from the patient portal static toolbar at **My Account > Billing**.

There are 3 categories on **Billing**:

- **Patient Responsibility**
- **Pending with Insurance**
- **Paid Invoices**

The default view is **Patient Responsibility**, which is expanded when **Billing** opens.

1. Sign in to the patient portal.
2. Click **My Account > Billing**.

   Billing opens.

   The invoices available for payment are displayed under **Patient Responsibility**.

   Invoices are listed according to the billing group that the invoice is connected to. To view additional invoices that are associated with other billing groups, select the billing group from **Billing Group**.

3. To view more details about the procedures that you were invoiced for, click the link in the **Procedure** column.

   Procedure is displayed.

   The type of office visit, lab work, and other tests are displayed in a list.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task
You have opened **Billing** and viewed your invoices.

What to do next
Pay an invoice.

Pay your invoices

If your provider supports billing payments, you can pay your invoices from the patient portal.

Before you begin
Refer to "Viewing your invoices" to learn the different ways to view your invoices in the patient portal.

> **Note:** If you are connected to a provider that does not support billing, the window is blank and the following message is displayed: `Billing is not currently supported by any of your connected organizations.`

1. Sign in to the patient portal.
2. From **Billing > Patient Responsibility**, select an invoice.
   - > Select 1 invoice by selecting the box next to the invoice.
   - > Select multiple invoices by selecting the box next to the invoices.
   - > Select **Pay All Invoices**.
   - > Enter a partial payment amount for an invoice in **Pay Now**.

   The total for the invoices that you selected or the amount that you entered is displayed in **Pay Now**.
3. Click **Pay Now**.

   The merchant payment web site is displayed.
4. Enter your credit card number and other required information.
5. Click **Process Transaction**.

   A confirmation receipt window opens if the transaction is successful and an email is sent to your patient portal Inbox.

Results of this task
The invoice that you paid is removed from **Patient Responsibility** and added to **Paid Invoices** when the transaction is complete.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

What to do next

Review your invoices that are pending insurance review. Invoices listed in **Pending With Insurance** are sent to your insurance company for payment. These invoices are not your responsibility for payment at this time.

Billing questions

If your provider supports billing questions, **Ask a Billing Question** is available from **Billing**.

Billing questions can also be sent when you compose an email from your Inbox. **Is this a billing question** is displayed on **Compose Email** to indicate that the email message is a billing question.

Ask a billing question from Billing

If your provider supports billing questions, **Ask a Billing Question** is available from **Billing**.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Billing**.

   Billing opens.
3. Click **Ask A Billing Question**.

   Billing Question opens.
4. From **To**, select a provider to send the question to.
5. For **Subject**, enter the purpose for your email.
6. For **Body**, enter the billing question.
7. Click **Send**.

   A confirmation window is displayed indicating that your email is sent.

What to do next

Monitor the **Inbox** tab for a response from your health care organization.

Ask a billing question from Compose Email

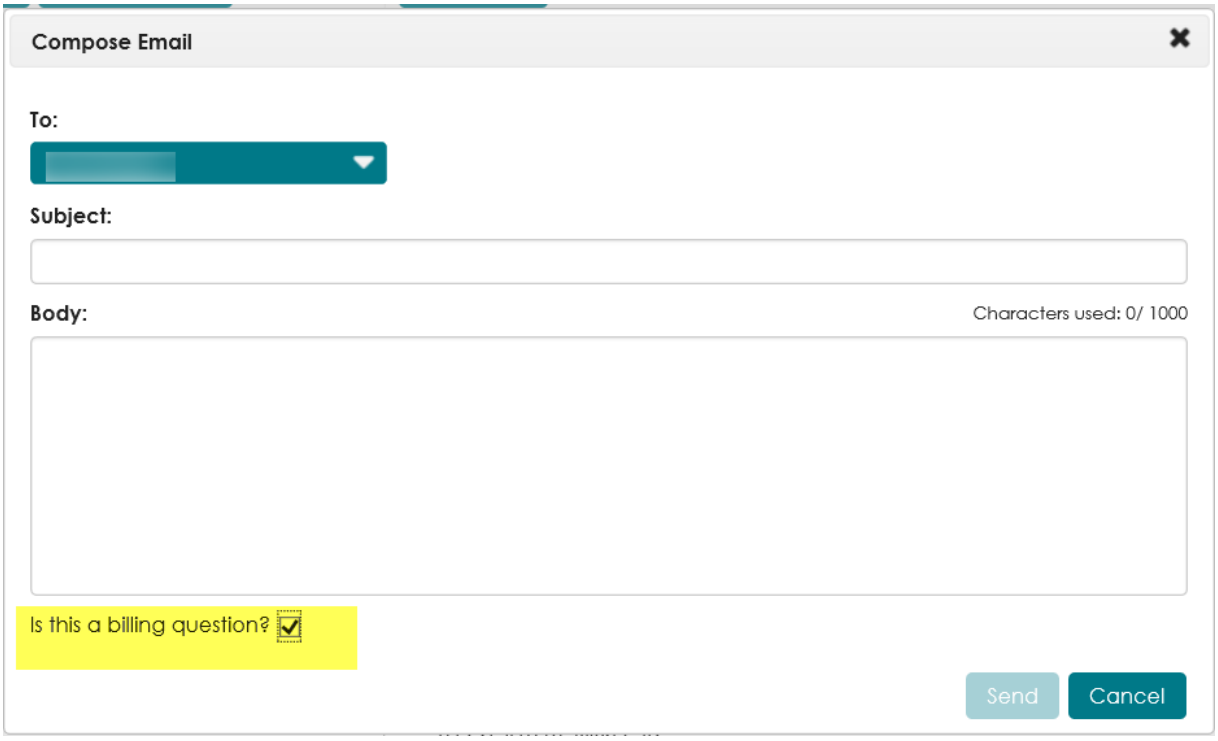
If your provider supports billing questions, **Is this a billing question** is available when you compose an email. This is another way to indicate that your email is a billing question.

1. Sign in to the patient portal.
2. Click the **Inbox** tab.

   The **Inbox** tab opens.
3. **Compose**.

   Compose Email is opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



4. From **To**, select a provider to send the question to.

   > **Note: Is this a billing question** is displayed after you select the provider, only if the provider that you select supports billing questions.

5. For **Subject**, enter the purpose for your email.
6. For **Body**, enter the billing question.
7. Select the **Is this a billing question** setting.
8. Click **Send**.

   A confirmation window is displayed indicating that your email is sent.

Results of this task

You have asked a billing question through your email account.

Manage account preferences

Preferences control several processes in the patient portal, such as authorized individual, sign-in methods, account notifications, news alerts, and restoring deleted items.

There are 6 sections in **Preferences**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- **Account Preferences**
  Manage your health record accounts, authorized individual accounts, and delete accounts.
- **Sign In Preferences**
  Manage your sign-in methods, such as FMH Sign In.
- **Notification Preferences**
  Manage how you want to be notified about new information that is added to your heath record.
- **Restore Deleted Items**
  View and restore items that you have deleted from your health record.
- **Activity History Log**
  View the recent activity for your health record. The log includes these actions: view, downloaded, and transmitted, accessed, printed, emailed, and faxed.
- **Display Preferences**
  Manage the visual display settings in your patient portal account.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.
   Preferences opens.
3. Click the preference tab that you want to work with.
   The tab that you selected is displayed.

Results of this task

You have accessed the patient portal account preferences and know how to configure your account settings.

Manage sign-in methods

Add an alternative sign-in for your patient portal account

When you create a new patient portal account, you must create a FMH Sign In user name and password. Best practice is to use this specific user name and password, but there are alternative sign-in options available after you complete your account registration.

If you currently use Facebook, Google, Yahoo!®, or have a Microsoft® account, you can use the user name and password associated with these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

You can add or disconnect sign-in methods using **Sign In Preferences**. You must have 1 active sign-in method at all times; you cannot disconnect a sign-in method if it is your only enabled method.

> **Note:** FMH Sign In credentials are required. You can edit FMH Sign In credentials from this window, but you cannot remove your FMH Sign In credentials.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Sign In Preferences** tab.

   The **Sign In Preferences** tab is displayed.
4. Click **Add** next to the authentication method that you want to add.

   The sign-in window opens for the authentication method.
5. Enter your user name and password for the authentication method.

   Remove changes to **Add** next to the authentication method in **Sign In Preferences**.

Results of this task

You have added an authentication method. The next time you sign in to the patient portal, click the authentication method icon that you want to sign in with.

Manage your FMH Sign In account preferences

Manage FMH Sign In preferences, update your notification email address, update your password, and turn on the two-factor authentication feature from the **Sign In Preferences** tab.

Edit FMH Sign In notification email address

You can change the email address that is used for your FMH Sign In notifications from the **Sign In Preferences** tab.

The email address that is listed in your FMH Sign In preferences is also listed in the **Demographics** tab, the **Notification Preferences** tab, and the **Goals** tab. If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address in the **Demographics** tab, the change is also made to the email address that is listed in these other locations. The **Goals** tab is only displayed if your provider has the goals feature turned on.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** The notification email can be the same email that is used as your FMH Sign In user name, but you cannot change the email that is used as your user name.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Sign In Preferences** tab.

   The **Sign In Preferences** tab is displayed.
4. Click **Preferences** next to the FMH Sign In icon.

   Manage Your FMH Sign In Account opens.
5. From **Secure Sign In Notifications**, enter the password in **Email** that you want to use for your notifications.
6. Confirm your new password by entering the password in **Confirm new password**.
7. Click **Change Email**.

Results of this task

You have changed your FMH Sign In notifications email address.

Edit FMH Sign In password

You can edit your FMH Sign In account password from the **Sign In Preferences** tab.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Sign In Preferences** tab.

   The **Sign In Preferences** tab is displayed.
4. Click **Preferences** next to the FMH Secure Sign In icon.

   Manage Your FMH Sign In Account opens.
5. Enter your current password in **Current password** and enter a new password in **New password**.
6. Confirm your new password by entering the password in **Confirm new password**.
7. Click **Save**.

Results of this task

You have changed your FMH Sign In password.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Two-factor authentication

After you create your account with a FMH Sign In credentials, you can add another layer of security verification for your account.

The two-factor authentication method works by providing a new numeric PIN each time that you sign in with your FMH Sign In credentials.

The PIN is sent to your communication method of choice. You can use the email address that is used for FMH Sign In notifications, Short Message Service (SMS) text, or a Quick Response (QR)-Code reader that is added to your phone or tablet.

After you sign in to your account, the two-factor authentication sign-in window opens and you receive the PIN in your communication method of choice. Use the PIN to sign in.

Add two-factor authentication from your patient portal account
Two-factor authentication can be used with your FMH Sign In account. You can add this extra layer of security after you have created your patient portal account and have FMH Sign In credentials.

1. Sign in to the patient portal.
2. From the patient portal static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Sign In Preferences** tab.

   The **Sign In Preferences** tab is displayed.
4. Click **FMH Sign In Preferences**.

   Manage Your FMH Sign In Account opens.
5. Scroll down to **Two-factor authentication Preferences**.
6. Select the communication method that you want to use to receive the PIN code.

Email

Select **Email** to receive the verification code through your email account. When you select **Email**, the email address associated with your FMH Sign In account is automatically filled in the **Email** box under **Secure Sign In Notifications**. Enter your email address in the **Confirm Email** box to confirm and click **Save**.

SMS

Select **SMS** to receive the verification code through a Short Message Service (SMS) text message on your cellular phone. Enter your phone number in **Mobile Phone**, select your mobile carrier from **Mobile Carrier**, and click **Save**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

App

Select **App** to receive the verification code through the authenticator application on your smart phone. Scan the Quick Response (QR) barcode provided on the window and click **Save**. If you select the authenticator application method, make sure that the application is already installed on your smart phone and available to use before finishing the registration process.

Results of this task

The two-factor authentication sign-in window opens when you use FMH Sign In credentials.

Turn off two-factor authentication method

You can turn off the two-factor authentication feature in the patient portal.

1. Sign in to the patient portal.
2. From the patient portal status toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Sign In Preferences** tab.

   The **Sign In Preferences** tab is displayed.
4. Click **FMH Secure Sign In Preferences**.

   Manage Your FMH Sign In Account opens.
5. Scroll down to **Two-factor authentication Preferences**.
6. From the communication method drop-down menu, click **None**.
7. Click **Save**.

Results of this task

The two-factor authentication feature is turned off.

Set notification preferences

There are several ways for you to be alerted by FollowMyHealth when a provider or organization has a notification for you. Notifications include **My Reminders**, **Goal Alerts**, **Check In Reminders**, **Appointment Reminders**, **Appointment Updates**, **Updates to Health RecordOrganization Bulletins**, and **Notice Communication from Provider**.

You can also change a cell phone number and email address from the **Notification Preferences** tab in **Preferences**.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Notification Preferences** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The **Notification Preferences** tab is displayed.

4. Go through each notification type section and select **Email** or **Text Message** to configure how you want to receive notifications.

   The notification email default is the email address used for your invitation and all notification preferences default to email.

Appointment Reminders

Specifies how the organization that you are connected to can send appointment reminders. You can receive an email in your external email account or a text message notifying you when an appointment reminder is added to your FollowMyHealth Inbox.

Appointment Updates

Specifies how the organization that you are connected to might send appointment updates. You can receive an email in your external email account or a text message notifying you when an appointment update is added to your FollowMyHealth Inbox.

Updates to Health Record

Specifies how the organization that you are connected to can send health record updates when a new item is added to the **My Health** tab in FollowMyHealth. You can receive an email in your external email account or a text message notifying you when health record updates are added to **My Health**.

Notice of Communication from Provider

Specifies how you can receive an email in your external email account or a text message notifying you when a secure message is added to your FollowMyHealth Inbox from your provider.

Organization Bulletins

Specifies how the organization you are connected to can send general news bulletins, for example, sharing holiday hours or notifying you of a flu shot clinic. You can receive an email in your external email account or a text message notifying you when a bulletin is added to your FollowMyHealth Inbox.

My Reminders

Specifies how you will receive reminders. **My Reminders** are automatically created for new goals and can be configured for anything that you want to use them for. **My Reminders** are only displayed if your provider has enabled the goals feature.

Goal Alerts

Specifies how the organization that you are connected to can send goal alerts: through email or text message. You automatically receive goal alerts in **Action Center** if your reading violates

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

1 or more rules set by your provider. **Goal Alerts** are only displayed if your provider has enabled the goals feature.

Check In Reminders

Specifies how the organization that you are connected to can send appointment check-in reminders. You can receive an email in your external email account or a text message notifying you when a check-in reminder is added to your FollowMyHealth Inbox.

If you select to receive notifications through text message, **Release of Information Disclaimer** opens. If you agree to receive personal information through a text message, click **Yes**. If you do not want to receive personal information through a text message, click **No**.

Change your cell phone number

FollowMyHealth sends you notifications through an external email address or cell phone. The cell phone number that you added when you registered for a FollowMyHealth account is displayed in the **Notification Preferences** tab, the **Demographics** window in **My Info**, and the **Goals** tab in **My Health**. You can change a cell phone number from either of these locations.

> **Note:** The **Goals** tab is not displayed in **My Health** unless your provider has the goals feature enabled and you have accepted a goal.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences > Notification Preferences**.

   The **Notification Preferences** tab is displayed.
3. Click **Change**.

   Cell Phone Number opens.
4. Select the country code.

   Click the country drop-down list and select a country code represented by a flag.

   - +1 Canada
   - +44 United Kingdom
   - +1 United States
5. For **Cell Phone**, enter the cell phone number that you want to use for notifications.
6. From **Cell Phone Carrier**, select the cell phone carrier that you use for cell phone service.
7. Click **Verify Cell Phone**.

   FollowMyHealth sends you a validation code text message to your cell phone.
8. For **Validation Code**, enter the validation code that you received through text message.
9. Click **Verify Cell Phone**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The cell phone number is displayed for **Cell Phone**.

Results of this task

You added your cell phone number to **My Account > Preferences > Notification Preferences**. You also updated the cell phone number at **My Info > Demographics** and on the **Goals** tab.

Change your email address

Notifications are sent to you through an external email address or cell phone. The email address that you added when you registered for a FollowMyHealth account is displayed in the **Notification Preferences** tab, the **Demographics** window in **My Info**, your FMH Secure Sign In preferences, and the **Goals** tab in **My Health**.

If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address in **Demographics**, the change is also made to the email address that is listed under these other locations.

> **Note:** The **Goals** tab is not displayed in **My Health** unless your provider has the goals feature enabled and you have accepted a goal.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences > Notification Preferences**.

   The **Notification Preferences** tab is displayed.
3. Click **Change** next to your current email address.

   Email address opens.
4. For **Email Address**, enter the new email address.
5. For **Confirm Email Address**, enter the email address again.
6. Click **Verify Email**.

   A verification email is sent to the email address that you entered.

   > **Note:** If you did not receive the email, check your junk mail folder, ensure the email was entered correctly, and ensure that it is a valid email address. If you entered the email address incorrectly, repeat steps 2-5.
7. Sign in to your email account and open the verification email from FollowMyHealth.
8. Click **Click here to verify your email address with FollowMyHealth**.

   FollowMyHealth **Sign In** opens.
9. Sign in to FollowMyHealth.

   FollowMyHealth opens and a window is displayed that confirms your email address is verified.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

10. Click **OK**.

Results of this task

Your email address in **My Account > Preferences > Notification Preferences** is changed. Your email address is also updated in **Demographics**, FMH Secure Sign In preferences, and on the **Goals** tab.

Set display preferences

You can change the way the patient portal interface is displayed, make alternative text available for images, change units of measure, and enable disclaimers on messages.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Display Preferences** tab.

   The **Display Preferences** tab is displayed.
4. Change your preferences.

Accessibility Preferences

Select **Display images of text** to control how the low, medium, and high graphic displays on the **Results** tab in **My Health**.
Select **Display high-contrast theme** to change the color of the user interface to a high contrast resolution for the visually impaired.

Units

Select the type of unit of measure that you want your vital signs to display in: English or Metric. The default units that are displayed are dependent on the country domain that you used to sign in to the patient portal.

> **Note:** Head circumference measurements always display in Metric.

Select the units for the following measurements.

Weight

Pounds or **Kilograms**

Height

Feet and inches or **Centimeters**

Temperature

Fahrenheit or **Celsius**

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Other Preferences

Select **Display message disclaimer** to open a disclaimer with each email message that you compose. If this preference is selected, **Emergency Message Disclaimer** opens each time you compose an email message.

5. Close **Preferences**.

Results of this task

You have set the display settings for your patient portal account.

Delete your universal health record account

> **Important:** This action permanently deletes your FollowMyHealth account and you no longer have access to your online healthcare record or providers. You cannot recover the deleted data.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.
3. Click the **Account Preferences** tab.

   The **Account Preferences** tab is displayed.
4. Click **Delete your UHR**.

   A warning message window opens to confirm that you want to delete your account.
5. Click **OK** to permanently delete your FollowMyHealth account.

Results of this task

You have deleted your patient portal account.

Restore deleted information

If you delete information or providers from your FollowMyHealth account, you can recover the deleted items from **Restore Deleted Items** in **Preferences**.

> **Note:** You cannot restore your account and data if you deleted your entire UHR as described in *Delete your universal health record account*. You can only use **Restore Deleted Items** to restore specific data or providers.

1. Sign in to the patient portal.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.

3. Click the **Restore Deleted Items** tab.

   The **Restore Deleted Items** tab is displayed.

4. Click **Restore** to add deleted items back to your FollowMyHealth account.

   The previously deleted item is removed from the list and can be found in the corresponding clinical data tab in **My Health**.

Results of this task

The deleted item is restored.

View activity history

Activity History Log in **Preferences** lists all of the activity in your patient portal account. For example, you can view detailed information about clinical documents that you downloaded or emailed or when you have accessed the patient portal or viewed records.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Preferences**.

   Preferences opens.

3. Click the **Activity History Log** tab.

   The **Activity History Log** tab is displayed.

4. Click **Previous** or **Next** to page through the **Activity History Log**.

Results of this task

You have viewed the **Activity History Log**.

Get technical support and assistance for you patient portal account

FollowMyHealth provides several ways to get technical assistance if you have issues working with the application or want to learn more.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Support**.

   Support Information opens. Several types of assistance are available from this window.

3. To access Knowledge Base, click **My Account > Help**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Knowledge Base opens.

4. To access the patient user manual from **Preferences**, click **My Account > Preferences**.

   Preferences opens. The **User Manual** link is displayed in the upper right.

5. Click **User Manual**.

   The patient user manual PDF opens.

Results of this task

You have accessed the patient user manual and technical support information so that you can learn more about how the patient portal works or ask a technical support representative a question.

Support information

Knowledge Base

This library provides articles about getting started with the product, frequently asked questions, security, problems and issues, using the product with mobile devices, and miscellaneous resources.

User Manual

The *Allscripts FollowMyHealth® Universal Health Record Patient Access User Guide* is accessible from this link.

My Info

The **My Info** tab contains your demographic information.

From the **Demographics** tab, you can manage your basic information, insurance, emergency contacts, and the person who is responsible for your account.

Demographics

Demographics includes 4 tabs, **General**, **Emergency Contact**, **Responsible Party**, and **Insurance**.

Some of the information in **General > Basic Information**, such as contact information, name, date of birth, and address might be filled based on the information that your healthcare organization already has recorded for you.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Edit preferred name

Your first name, as entered in the **First Name** box on the **Demographics** tab, is the default name on your health record. You can add a different name in the **Preferred Name** box so that this preferred name replaces your first name in the patient portal and in email communications.

Your preferred name does not replace your first name in the required Release of Information (ROI) document that you accepted during account creation. This document, located in your **Documents** tab, remains the same.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.
3. In **Basic Information > Name/DOB > Preferred Name**, enter the name that you want to display in the patient portal.
4. Click **Save**.

   A confirmation window is displayed to confirm if you want to send the change to your organization.
5. Click **Yes**.

   A demographic update request message is displayed.
6. Click **OK**.

   Save Successful is displayed.
7. Click **OK**.

Results of this task

You have updated your preferred name.

What to do next

After you save the updated information, you must sign out of the patient portal for the changes to occur. When you sign back in, the name that is entered for **Preferred Name** is displayed in various areas of the patient portal where the patient's first name previously displayed. Areas include the **Hello** greeting at the top of the patient portal, and the **Summary**, and **Inbox** tabs.

Email messages that are sent for prescription refills, appointment reminders, scheduled appointments, and sent by the provider through the EHR application also use the preferred name instead of the first name.

Click **Send** to send an email message to your provider about this demographic update.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Edit birth sex, sexual orientation, and gender identity

You can edit your birth sex, sexual orientation, and gender identity from **Birth Sex / Sexual Orientation / Gender Identity**. These are optional settings.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.
3. In **Basic Information > Birth Sex / Sexual Orientation / Gender Identity**, select the birth sex, sexual orientation, and gender identity that you want to display in the patient portal.
4. For **Birth Sex**, select your gender specified at birth, such as **Female**, **Male,** or **Unspecified**.
5. For **Sexual Orientation**, select your sexual orientation, such as **Straight or heterosexual**, **Lesbian, gay, or homosexual**, **Bisexual**, **Don't Know**, or **Other**.

   You can choose not to disclose this information. If you select **Other**, you are prompted to describe your sexual orientation in the displayed box.
6. For **Gender Identity**, select the gender that you identify with, such as **Female**, **Male**, **Transgender Male/Female-to-Male**, **Transgender Female/Male-to-Female**, **Genderqueer, neither exclusively male nor female**, or **Other**.

   You can choose not to disclose this information. If you select **Other**, you are prompted to describe your gender identity in the displayed box.
7. Click **Save**.

   A confirmation window is displayed.
8. Click **Yes**.

   A demographic update request message is displayed.
9. Click **OK**.

   Save Successful is displayed.
10. Click **OK**.

Results of this task

You have updated your birth sex, sexual orientation, and gender identity.

What to do next

Click **Send** to send an email message to your provider about this demographic update.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Edit email address from Demographics

You can edit your email address from **My Info > Demographics**, and synchronize the change with other areas of the patient portal where your email is listed.

Your email address is also listed in the **Notification Preferences** tab, your FMH Sign In preferences, and the **Goals** tab in **My Health**. When you change the email address in 1 of these locations, the change synchronizes for all locations.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.
3. In **Basic Information > Contact Information > Email**, click **Change**.

   Email Address is displayed.
4. Enter your new email address in **Email Address**.
5. Re-enter your email address in **Confirm Email Address**.
6. Click **Verify Email**.

   A verification email is sent to the email address that you entered.

   > **Note:** If you did not receive the email, check your junk mail folder, ensure the email was entered correctly, and ensure that it is a valid email address. If you entered the email address incorrectly, repeat steps 2-5.
7. Sign in to your email account and open the verification email that is sent from FollowMyHealth.
8. Click **Click here to verify your email address with FollowMyHealth**.

   FollowMyHealth **Sign In** is displayed.
9. Sign in to FollowMyHealth.

   FollowMyHealth opens and a window is displayed that confirms your email address is verified.
10. Click **OK**.

Results of this task

You have updated your email address in the **Demographics** tab. All other areas of the patient portal are also updated with your email address.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Edit your preferred pharmacy

If you find yourself using the same pharmacy, you can indicate this pharmacy as a preferred pharmacy in the **Demographics** tab.

You can also edit your preferred pharmacy from **My Health > Medications**.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.
3. In **Basic Information > Preferred Pharmacy**, click **Edit**.
4. For **Search**, enter the ZIP Code area that you want to search.

   Your ZIP Code is displayed as the default value when **Pharmacy Search** opens. You can change the value.
5. For **Distance in Miles**, select the proximity in miles that you want the application to search.

   The patient portal searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.
6. Select a pharmacy and click **Connect**.

   The **Pharmacy Search** window closes and **Demographics** tab is displayed.

Results of this task

The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy**. Your preferred pharmacy is also displayed on the patient portal **Home** tab under **Health Summary**, and on the **Medications** tab.

What to do next

Click **Send** to send an email communication to your provider about this demographic update.

Edit emergency contact

The **Emergency Contact** tab lists the person that your healthcare organization should contact if there is an emergency when you are with your healthcare provider.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.
3. Click the **Emergency Contact** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The **Emergency Contact** tab is displayed.

4. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information.

   Some of the information in **Emergency Contact** might be filled based on the information that your healthcare organization has recorded for you.

5. Click **Save**.

   A confirmation window is displayed to confirm if you want to send the change to your organization.

6. Click **Yes**.

   A demographic update request message is displayed.

7. Click **OK**.

   Save Successful is displayed.

8. Click **OK**.

Results of this task

You have updated your emergency contact information.

What to do next

Click **Send** to send an email communication to your provider about this demographic update.

Edit responsible party

The **Responsible Party** tab indicates the person who is responsible for any charges incurred with the healthcare organization. This person is also referred to as the *guarantor*.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.

3. Click the **Responsible Party** tab.

   The **Responsible Party** tab is displayed.

4. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information.

   Some of the information in **Responsible Party** might be filled based on the information that your healthcare organization already has recorded for you.

5. Click **Save**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

A confirmation window is displayed to confirm if you want to send the change to your organization.

6. Click **Yes**.

   A demographic update request message is displayed.

7. Click **OK**.

   Save Successful is displayed.

8. Click **OK**.

Results of this task

You have updated your responsible party information.

What to do next

Click **Send** to send an email communication to your provider about this demographic update.

Edit insurance information

The **Insurance** tab lists your primary, secondary, and tertiary insurance information.

1. Sign in to the patient portal.
2. Click **My Account > My Info**.

   The **My Info** tab is displayed.

   The **Demographics General** tab is displayed when you open **My Info**.

3. Click the **Insurance** tab.

   The **Insurance Information** tab is displayed.

4. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information for each section, **Primary**, **Secondary**, and **Tertiary**.

   Some of the information in **Insurance** might be filled, based on the information your healthcare organization already has recorded about you.

5. Click **Save**.

   A confirmation window is displayed to confirm if you want to send the change to your organization.

6. Click **Yes**.

   A demographic update request message is displayed.

7. Click **OK**.

   Save Successful is displayed.

8. Click **OK**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

You have updated your insurance information.

What to do next

Click **Send** to send an email communication to your provider about this demographic update.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 6

The Home tab

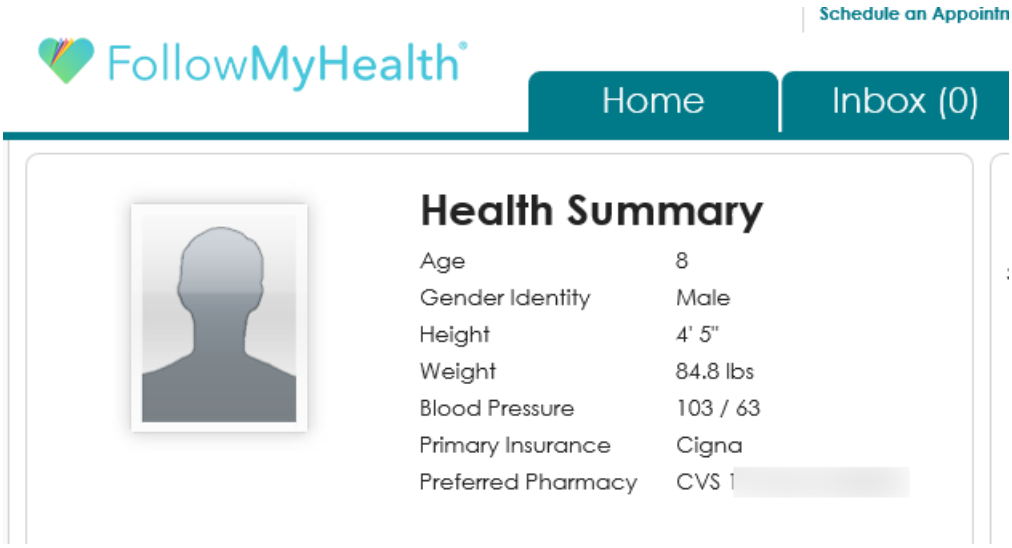
The **Home** tab is the first tab to display after you sign in. You can compose a message, view your health summary, manage activities, appointments, billing, and applications from the **Home** tab.

If your healthcare provider participates in telehealth services, you can access **On-Demand Video Visit** or **Email Visit** services from **Get Treated Now** on the **Home** tab.

Health Summary

The **Health Summary** section on the **Home** tab includes basic information about you, including age, birth sex, height, weight, body mass index (BMI), blood pressure, preferred pharmacy, and primary insurance.

The information under **Health Summary** is pulled from the clinical item tabs in **My Health**.



Action Center

The **Action Center** section on the **Home** tab notifies you of items that require your attention. You can view an **Action Center** list or a calendar view.

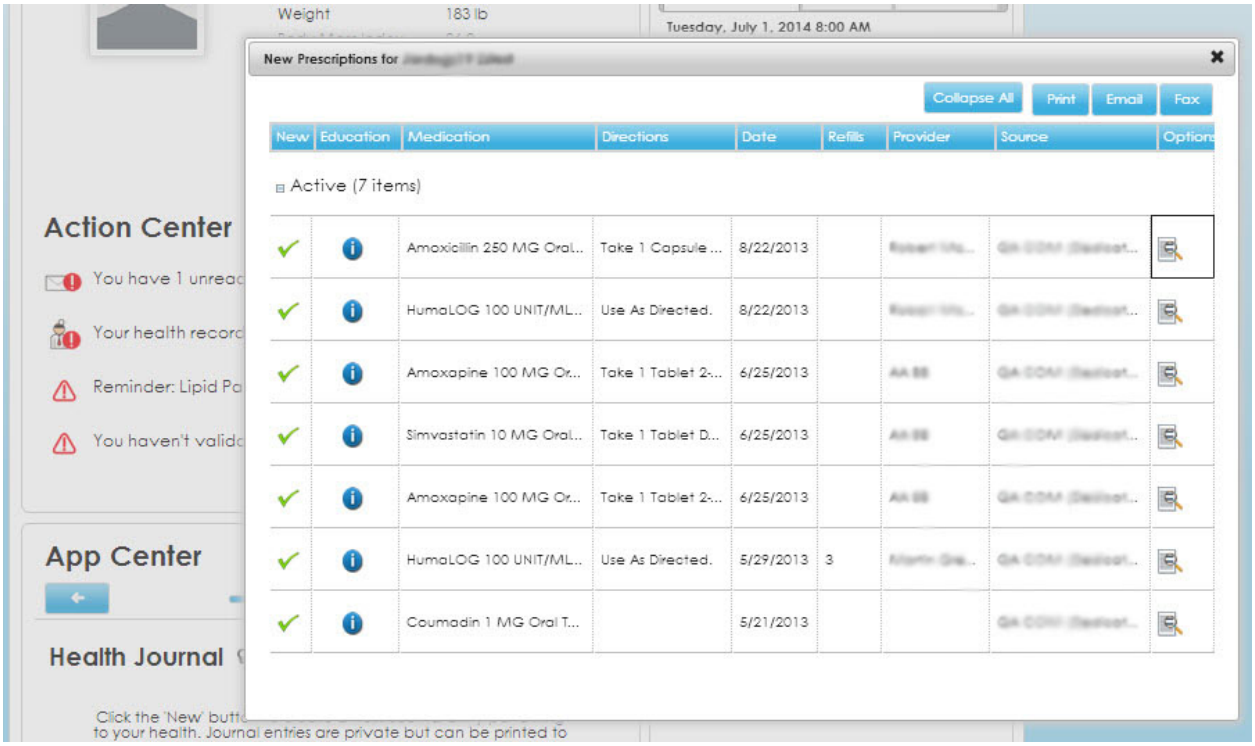
Action items for patients that you are an authorized individual for are also listed on **Action Center** under the patient's name.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

You can select any item from the **Action Center** list to expand the detailed section in the patient portal. For example, select a clinical item from **Updated Clinical Items** and the clinical item opens as if you are in **My Health**. You can view the details from this window and print, fax, or email.

The provider might send you a form to provide updated health information. In this scenario, an action item is displayed in **Action Center** and you can click the forms attachment to open the form. Complete the form from **Action Center** and click **Submit** to send the form back to your provider.

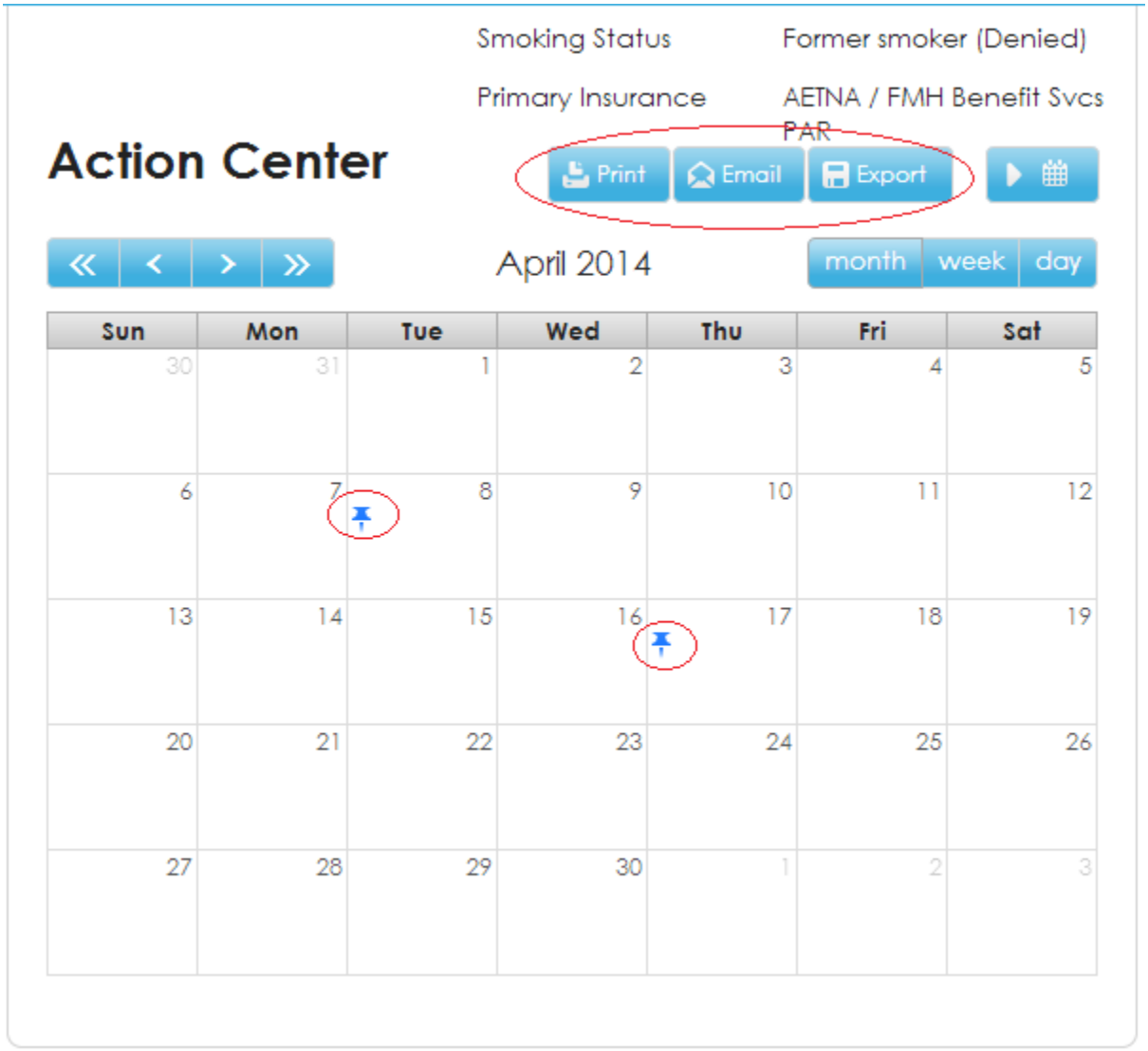
You can also launch InfoButton™ education without navigating to **My Health** or **Know My Health**.



The calendar view contains thumb tack icons to indicate appointments or events are scheduled. You can print, email, and export from the calendar view.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

When you export your calendar view, the scheduled appointments are displayed in the calendar program on your desktop, such as Microsoft® Outlook.

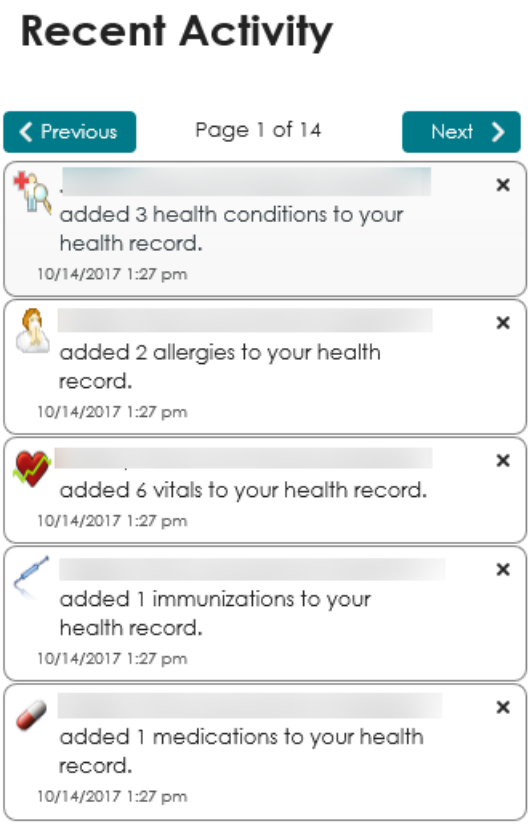


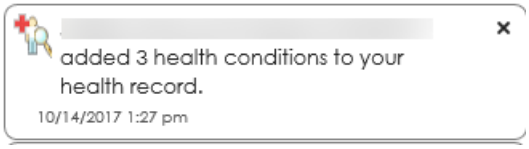
Note:
When you email, print, or fax your health record data from and appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Recent Activity

The **Recent Activity** section on the **Home** tab shows the most recent activity in your patient portal account.



Click an item in the **Recent Activity** list and the details are opened in the respective tab. For example, click the conditions entry in the list 

and the **Conditions** tab opens. You can view the detailed information about the condition that your provider added to your health record.

Click the **Next** and **Previous** arrows to page through the activity items.

To remove items from **Recent Activity**, click × next to the item.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Appointments

Depending on the features that your organization has enabled, you can view, request, schedule, reschedule, and cancel appointments from the **Appointments** section on the **Home** tab. If your provider's health organization has enabled Check In, you can also remotely check-in to your appointments from the patient portal.

The **Appointments** section contains 3 tabs.

Upcoming

This tab includes all future appointments that you have scheduled. You can view, reschedule, and cancel appointments from the **Upcoming** tab.
The **Check In** button is displayed in the **Upcoming** tab if your provider's organization supports remote check-in.

Past

This tab includes all past appointments.

Other

This tab includes all other appointments, such as cancelled appointments or appointments that you did not show up for.

Search enables you to search the current tab by organization name or provider name. Click **Export** to export the appointments in a `.ics` file to your calendar.

> **Note:** When you email, print, or fax your health record data from an appointment, the message that is displayed in the confirmation window includes a statement to inform patients that transmitted health data is not encrypted.

Your provider can send you an Appointment Reminder message through your Inbox and include an attached form. The forms are used by your provider to collect information that they want before you arrive for your appointment. When you open the form from your Inbox, you can complete the form and click **Submit** to send the form back to your provider.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Check-in for your appointment

You can remotely check-in for your appointment from the **Appointments** section on the patient portal **Home** tab if your provider's organization supports remote check-in.

Before you begin

Healthcare organizations have the option to send you a Check In Reminder message through your communication method of choice: text, email, or FMH Message.

The **Check In** button is displayed next to the appointment in the **Upcoming** tab. Your provider's healthcare organization determines the number of days before the appointment that you can check in. The **Check In** button is not displayed until the scheduled check-in date. For example, if your provider sets the check-in date to 2 days, the **Check In** button is displayed starting 2 days before your appointment date.

1. Sign in to the patient portal.

   The **Home** tab is displayed.

2. Locate the appointment in the **Upcoming** tab and click **Check In**.

   Check In - Consent Form is displayed.

   > **Note:** The consent form step only opens the first time you use the check-in feature or when the consent form is expired. Your organization sets the expiration date for the consent form.

3. Complete the consent form if this your first time using remote check-in or if your consent form is expired.

   If this appointment is for you, **Patient** is automatically selected. If you are an authorized individual and are checking in for a dependent, **Parent/Guardian/Other Legal Representative** is selected.

4. Select **eSignature consent**.
5. Select the signature type that you want to use.

   > **Type Signature**
   > Use the keyboard to enter your signature in the box.

   > **Draw Signature**
   > Hold down the left mouse button as you write your signature in the box.

6. Click **Accept**.

   Check In - Verify Demographics is displayed.

7. Verify your basic, social, insurance policy, and responsible party information.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

If you edit this information during check-in, a message is displayed to confirm that you want to send the changes to other connected organizations. Click **Yes** or **No**.

This information matches the information listed under **My Info > Demographics**, with the exception of the insurance information, which might or might not match the information in your patient portal account.

If you edit the information, changes are also made in **My Info > Demographics** and vice versa.

> **Note:** If you update the insurance information, you cannot make your co-payment during check-in. The **Go to Payment Page** button is not available. You can continue to click the **Pay at Front Desk** button.

8. Click **Next**.

   Check In - Co-Payment is displayed.

9. Pay your co-payment.

   > Click **Go to Payment Page**.
   > The payment window opens. Enter your credit card information and click **Pay Now**.

   > Click **Pay at Front Desk**.

   Check In - Summary is displayed and check in is complete.

Results of this task

You have checked in for your appointment.

A confirmation email message is sent to your patient portal Inbox. If you signed the consent form, a copy is added to the **Documents** tab in **My Health**. If you submitted a co-payment, your payment is complete.

Request an appointment

You can request an appointment with a provider from the patient portal. During the request workflow, you can select multiple dates and times. Your provider sends you a confirmation message with your appointment information after your request is completed.

1. Sign in to the patient portal.
2. Use 1 of following methods to directly request an appointment.

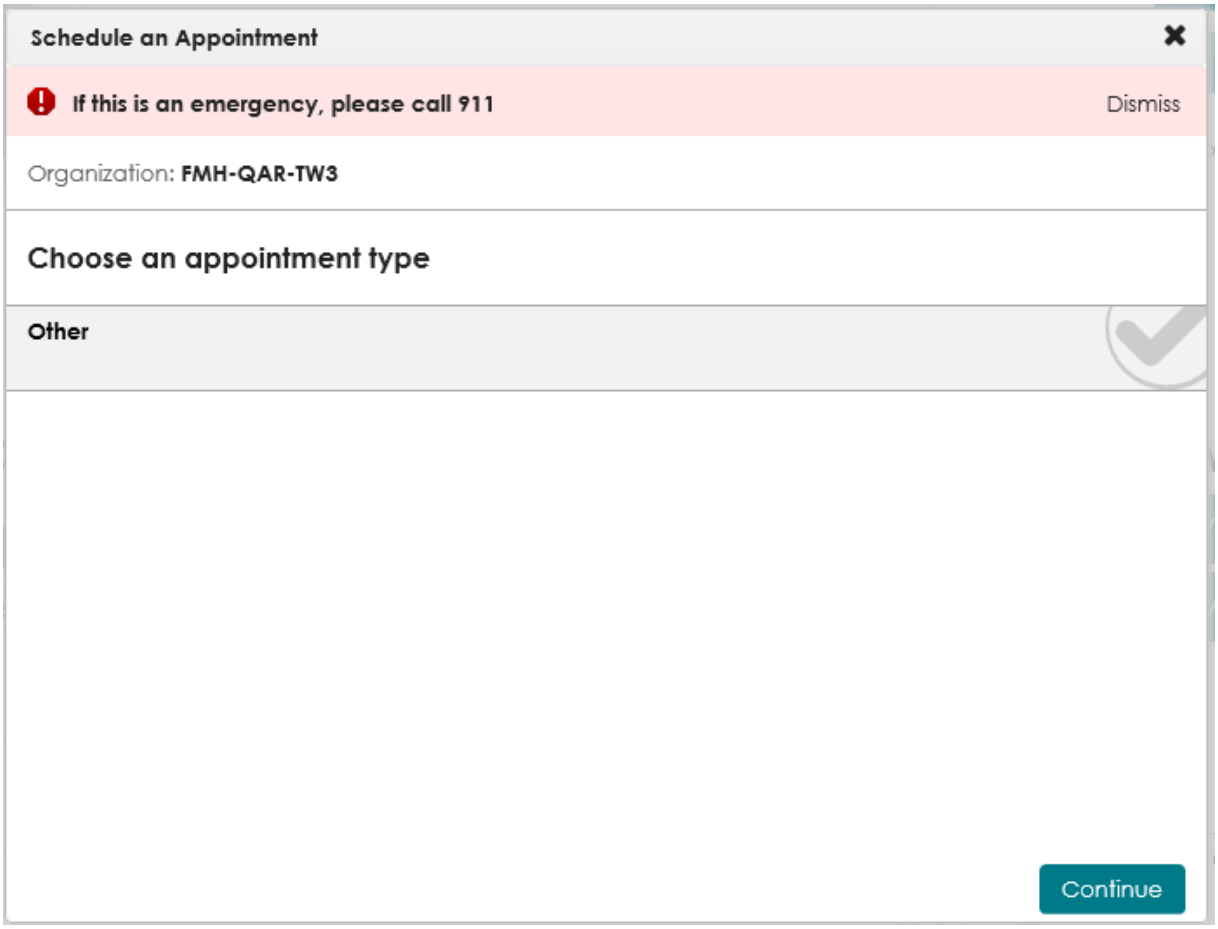
   > From the **Home** tab, click **Request** from the **Appointments** section.
   > From the static toolbar, click **Schedule an Appointment**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** Your healthcare record must be connected to at least 1 provider that has enabled online appointment requests. Otherwise, **Request** is unavailable.

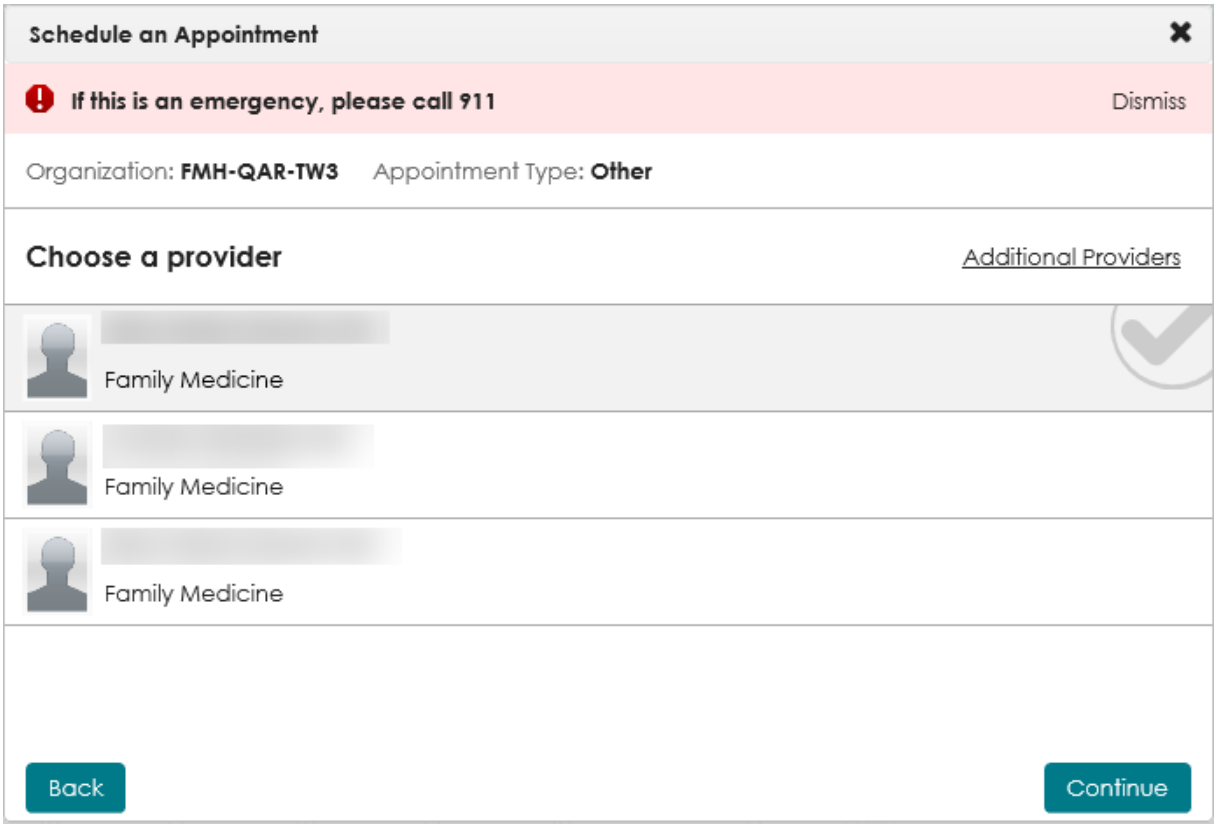
Schedule an Appointment is displayed.

3. From **Choose an appointment type**, select an appointment type and click **Continue**.

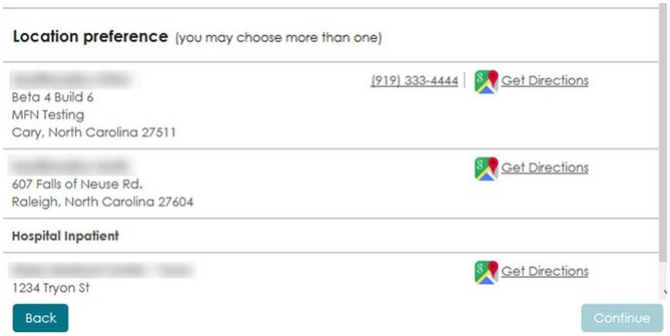


Choose a provider is displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



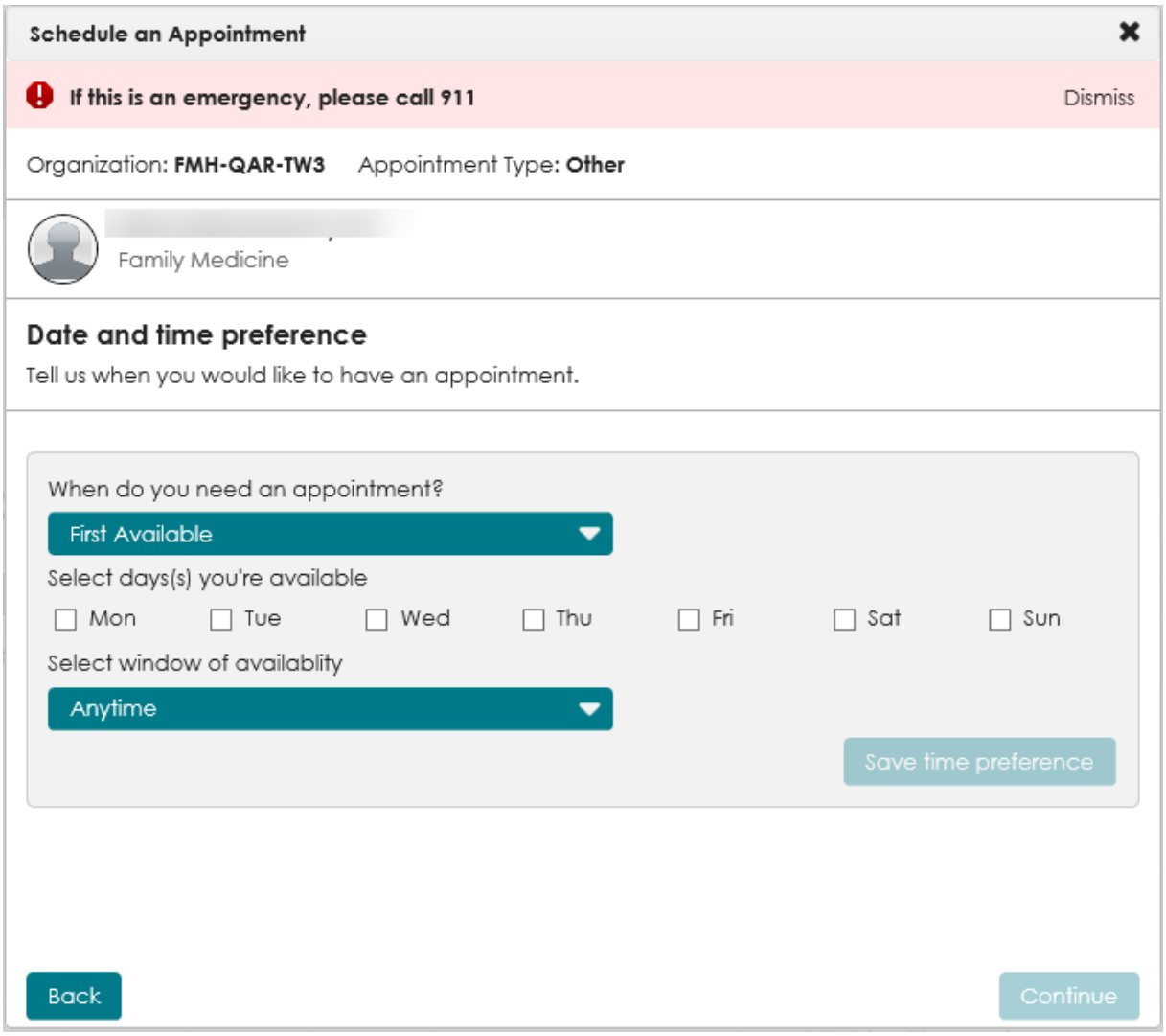
If your provider sees patients in multiple locations, **Location preference** is displayed.



4. Select a provider and click **Continue**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Date and time preference are displayed.



If you do not want to select a provider that is listed, click **Additional Providers**. You can request an appointment from the providers listed here who are available for new patient appointments.

5. From **When do you need an appointment**, select **First Available** or the number of weeks out that you want the appointment.
6. Select the days that you are available.

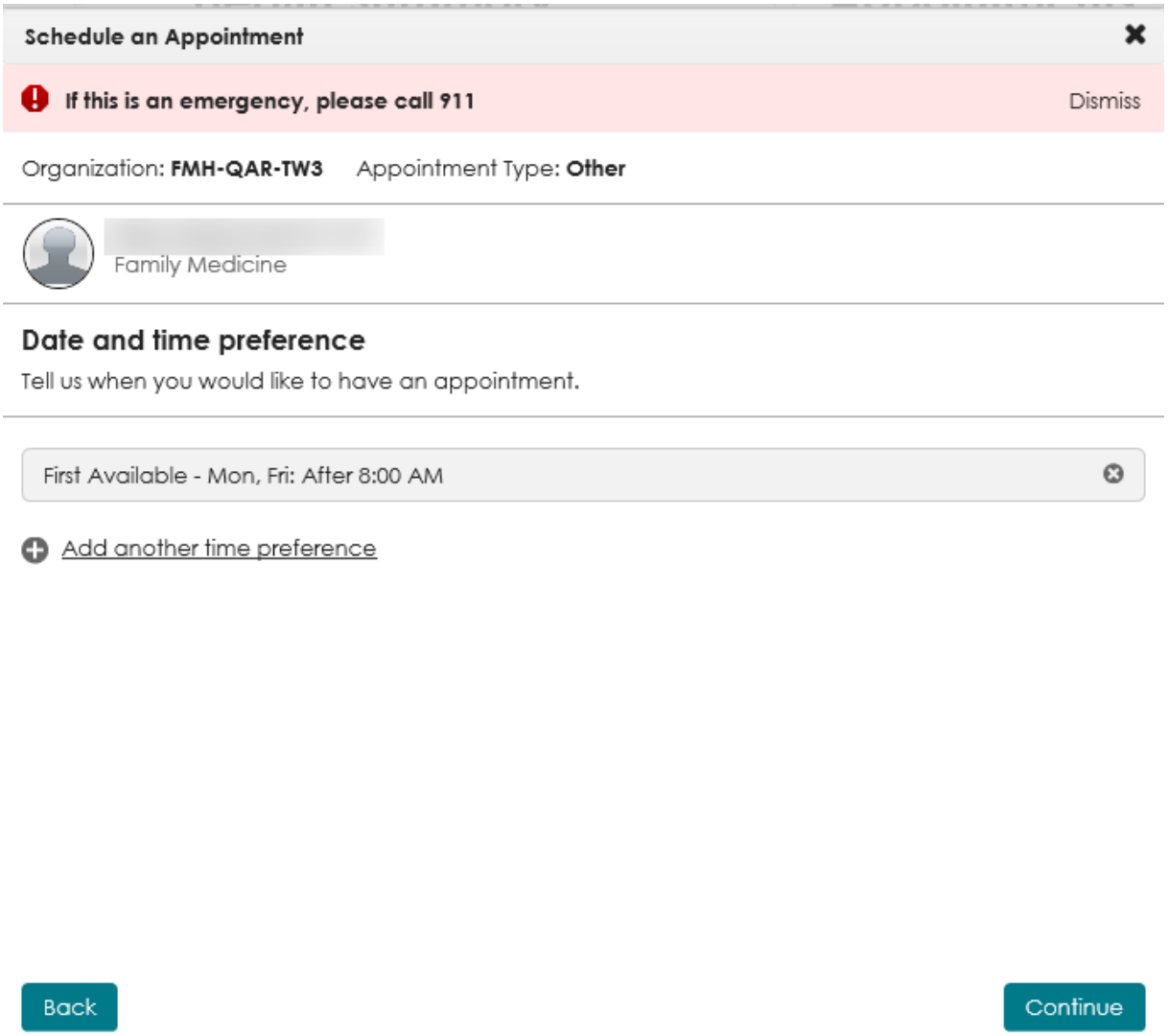
   You can select a date up to 1 year in advance, when requesting an appointment.
7. From **Select window of availability**, select **Anytime** or a window of time that you are available.

   When you click **After** or **Before**, a time box is displayed. For example, if you are available after 9:00 AM, select **9:00 AM** from the drop-down menu.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

If you are available during a longer time period during the day, click **Between** to set a window of availability. For example, if you are available between 8:00 AM and 5:00 PM, select **8:00 AM** in the first time box and **5:00 PM** in the second time box.

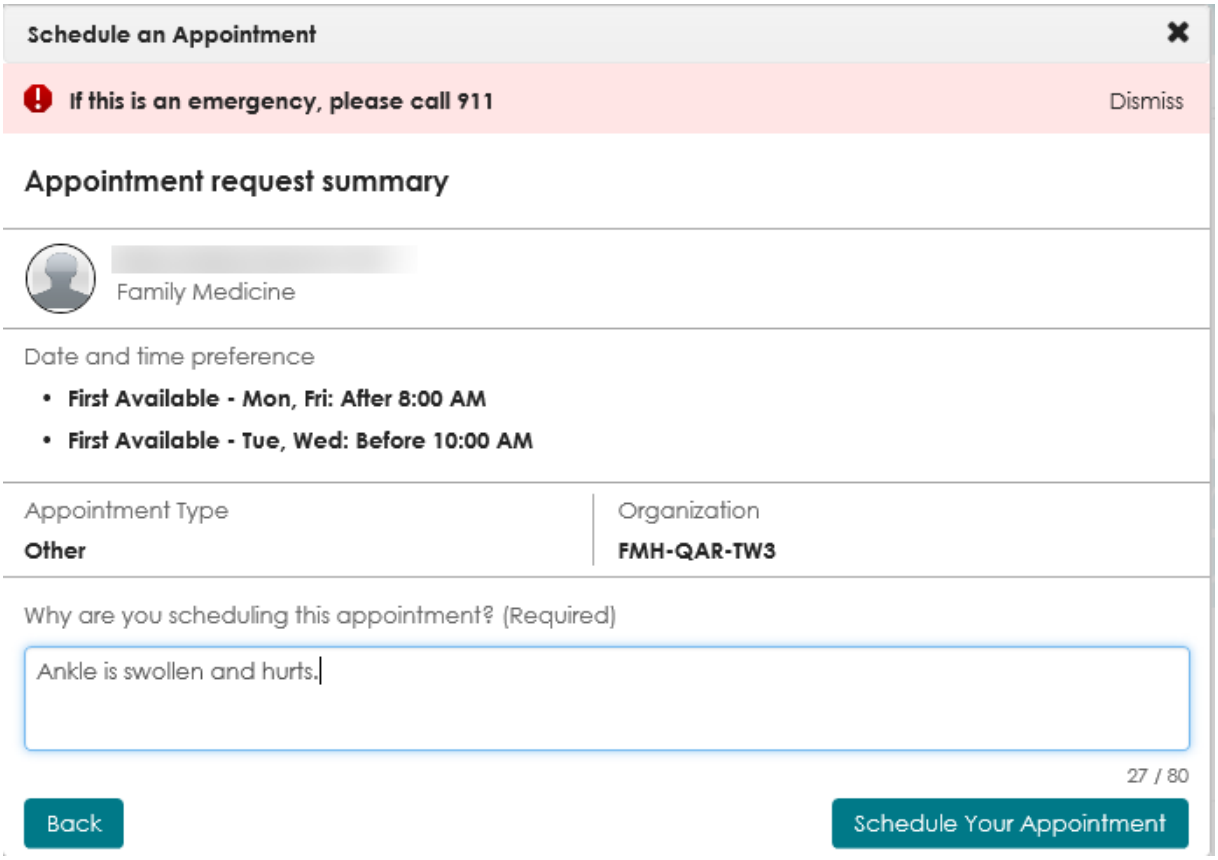
8. Click **Save time preference** for each appointment day and time selection.
   The appointment choices are listed in **Date and time preference**.



   To add more time preferences, click **Add another time preference**. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon × next to the list item.

9. When you are done adding appointment dates and times, click **Continue**.
   Appointment request summary is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



10. From **Location Preference**, select a location where you prefer your appointment.

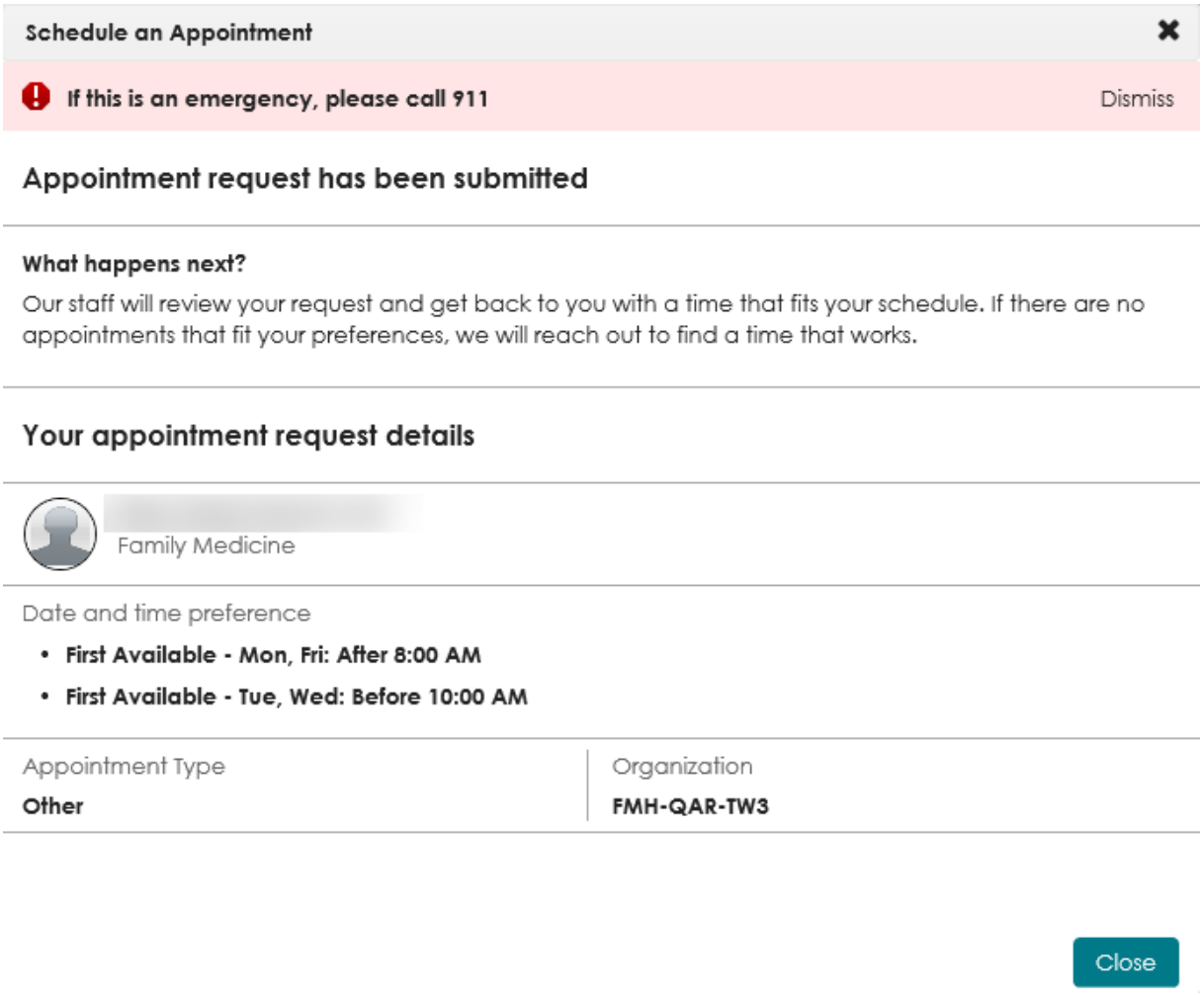
    You can select 1 or more locations. If you do not select a location, your organization assumes that you can be seen at any of the locations that are listed.

> **Note:**
> **Location Preference** is only displayed if the provider that you have chosen for the appointment has his or her appointment locations set and you have selected and appointment type of **Other**.
>
> Selecting a location is not supported with the direct schedule workflow.

11. Enter the reason for the appointment in **Why are you scheduling this appointment**.
12. Click **Schedule Your Appointment**.

    Appointment request has been submitted is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



13. Click **Close**.

Results of this task

A message is displayed to remind you that the requested appointment is not scheduled until the provider schedules an appointment that fits your request criteria.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Directly schedule the next available appointment

Your provider might allow direct scheduling. This means that you can view your provider's next available appointment and directly schedule the appointment with the next available workflow.

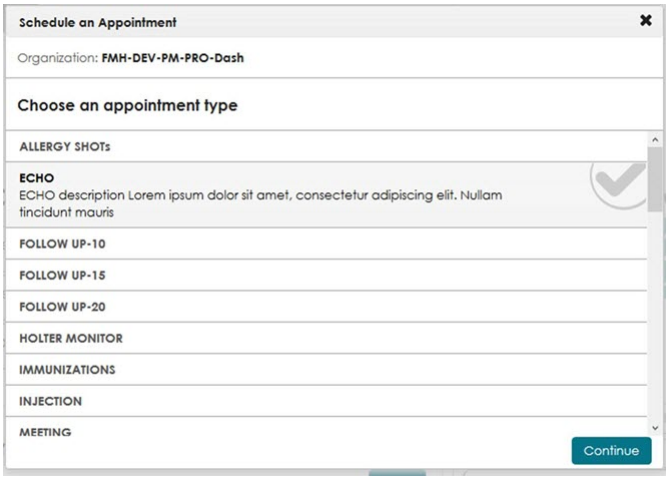
Before you begin

Your provider and organization must have direct scheduling enabled for you to directly schedule appointments. If direct scheduling is enabled, the patient portal displays a message to search the provider's calendar and select a specific appointment time.

1. Sign in to the patient portal.
2. Use 1 of following methods to directly request an appointment.
   - > From the **Home** tab, click **Request** from the **Appointments** section.
   - > From the static toolbar, click **Schedule an Appointment**.

   > **Note:** Your healthcare record must be connected to at least 1 provider that has enabled online appointment requests. Otherwise, **Request** is unavailable.

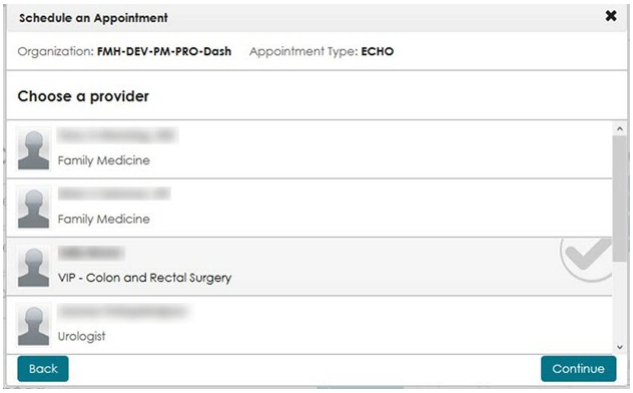
   Schedule an Appointment is displayed.



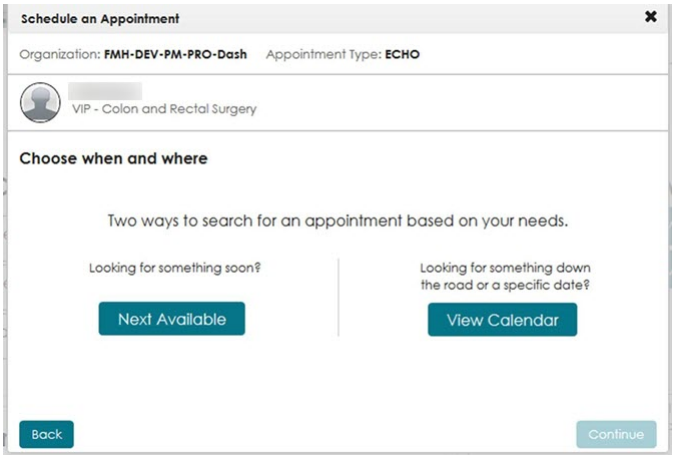
3. From **Choose an appointment type**, select an appointment type and click **Continue**.

   Choose a provider is displayed.

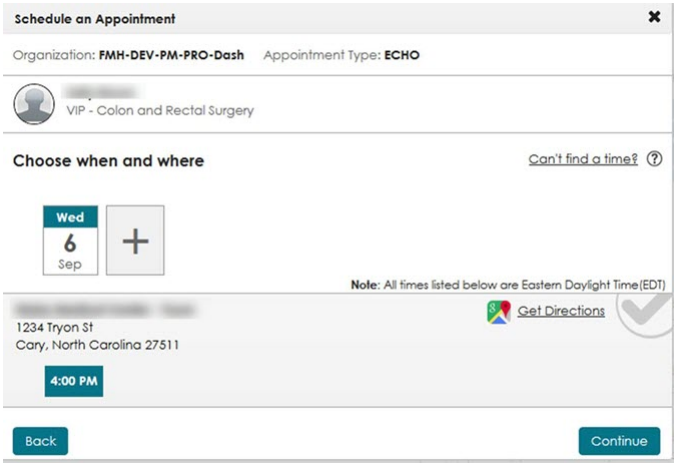
Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



4. Select a provider and click **Continue**.
   Choose when and where is displayed.

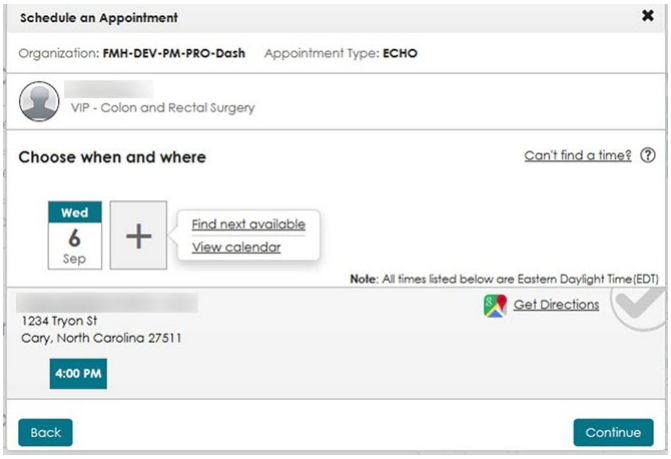


5. Click **Next Available** to search for an appointment that is available in the next few days.
   Calendar dates, appointment times, and locations are displayed.

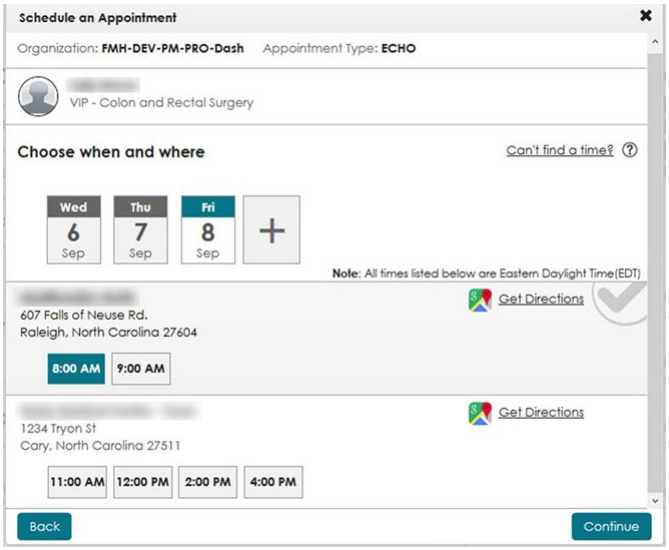


Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

6. To view more available dates and times, click the plus sign box, and select **Find next available** or **View calendar**.

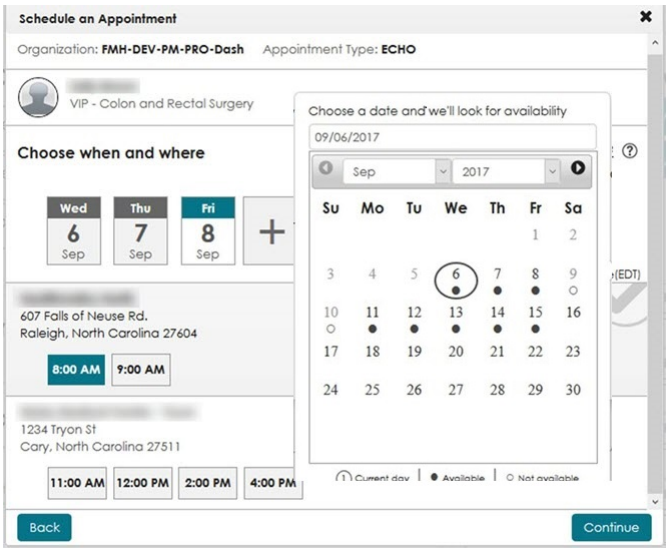


When you click **Find next available**, the next available date is automatically added to **Choose when and where** as illustrated in the following image.



When you click **View calendar**, the calendar is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

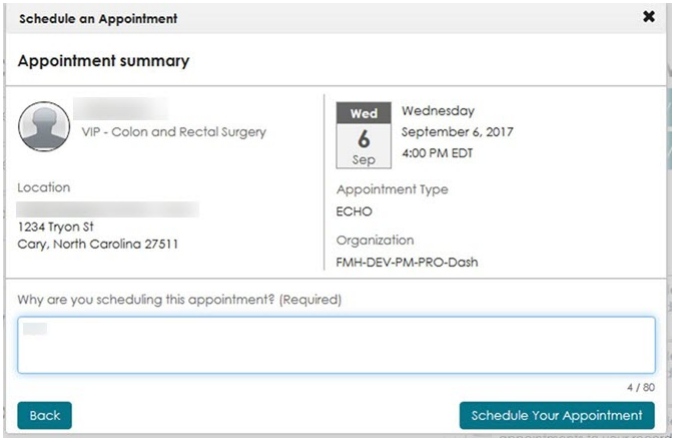


If you search for more appointment dates and no times are available, a message is displayed that there are no more appointment openings for that date. The application prompts you to pick a different date, look for the next available appointment on the following calendar day, choose a different provider, call to schedule an appointment, or let your provider schedule an appointment for you.

If you cannot find a date and time that matches your available criteria, you can request an appointment when you click **Can't find a time**. The request an appointment workflow starts where you can request appointment dates and times and your provider will contact your through a secure message as to what appointment is scheduled for you. See "Request an appointment" for more information about how you can request an appointment.

7. Select the appointment that you want.

   Appointment summary is displayed.



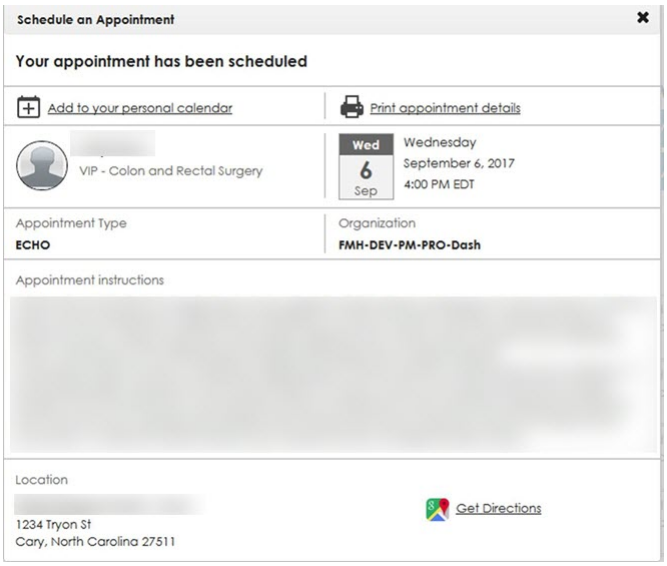
8. Enter the reason for the appointment in **Why are you scheduling this appointment**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Provide a short description of your health issue and reason for the visit. You are limited to 80 characters.

9. Click **Schedule Your Appointment**.

   A message is displayed to confirm that you scheduled an appointment.



Results of this task

You have reserved an appointment with your provider. The appointment takes a few minutes to post to your health record.

> **Important:** If another patient simultaneously reserves an appointment for this time slot, you are notified that the time slot is no longer available, and you must select a new appointment time.

What to do next

You can add the appointment to your personal calendar or print the appointment information.

Click **Get Directions** to view a map and directions to your appointment location. Your provider might also include a photo of the appointment location.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Directly schedule a future appointment

Your provider might allow direct scheduling. This means that you can select a future date from the calendar tool to directly schedule an appointment.

Before you begin

Your provider and organization must have direct scheduling enabled for you to directly schedule appointments. If direct scheduling is enabled, the patient portal displays a message to search the provider's calendar and select a specific appointment time.

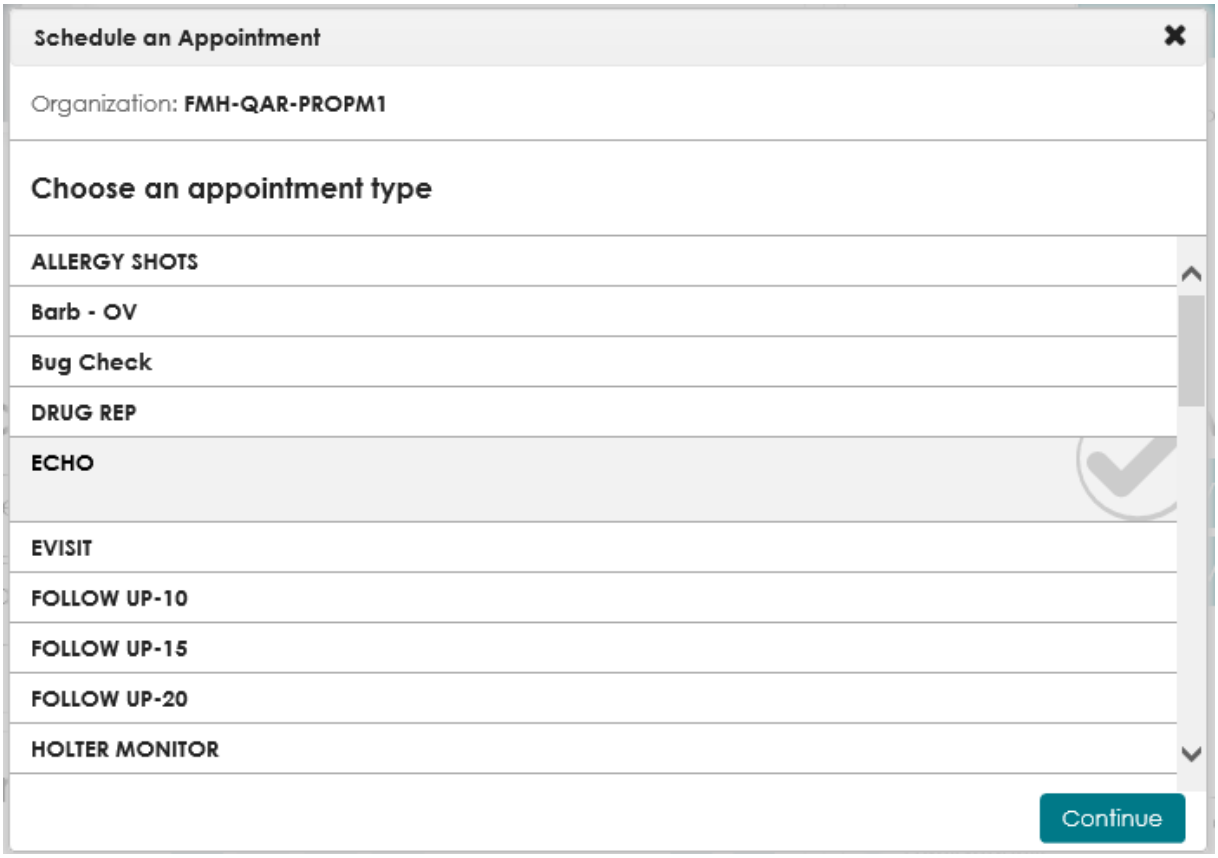
You can determine that your provider or organization has direct scheduling enabled if there are appointment types listed in the **Appointment Type** drop-down list other than **Other**. If there are not appointment types listed other than **Other**, direct scheduling is not enabled.

1. Sign in to the patient portal.
2. Use 1 of following methods to directly request an appointment.
   - > From the **Home** tab, click **Request** from the **Appointments** section.
   - > From the static toolbar, click **Schedule an Appointment**.

> **Note:** Your healthcare record must be connected to at least 1 provider that has enabled online appointment requests. Otherwise, **Request** is unavailable.

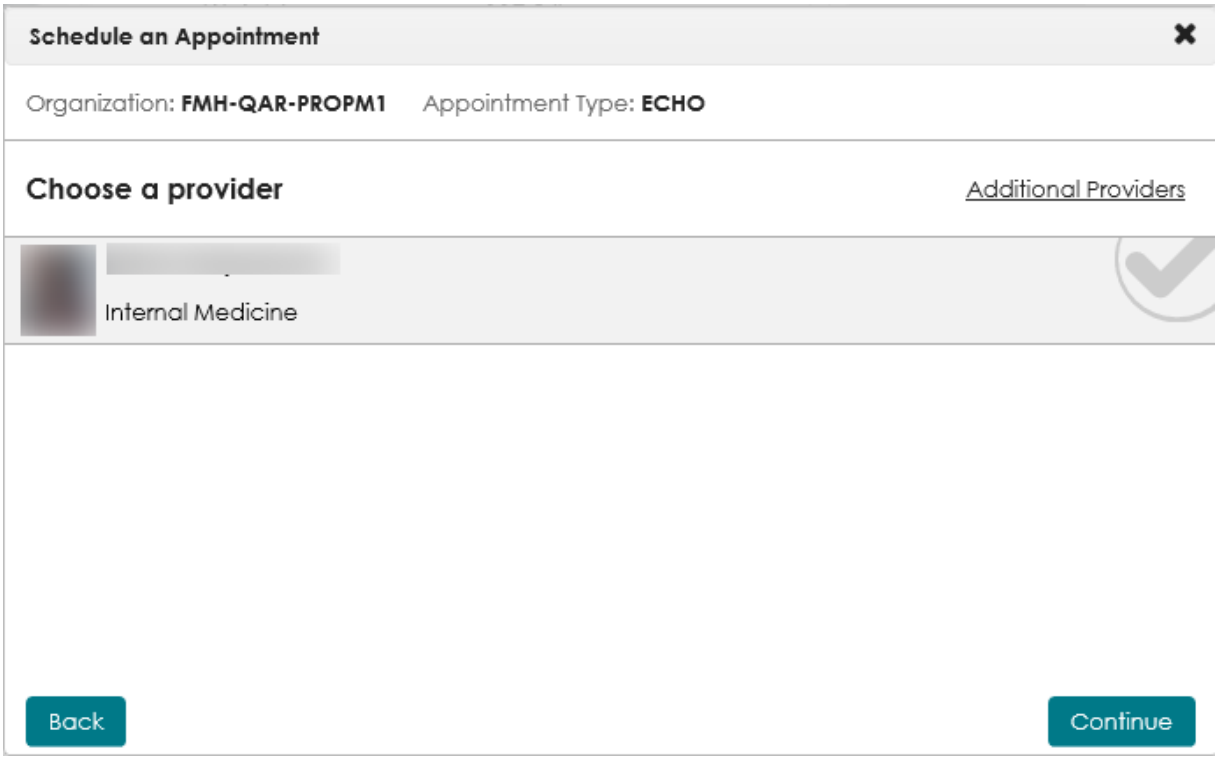
Schedule an Appointment is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. From **Choose an appointment type**, select an appointment type and click **Continue**. **Choose a provider** is displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

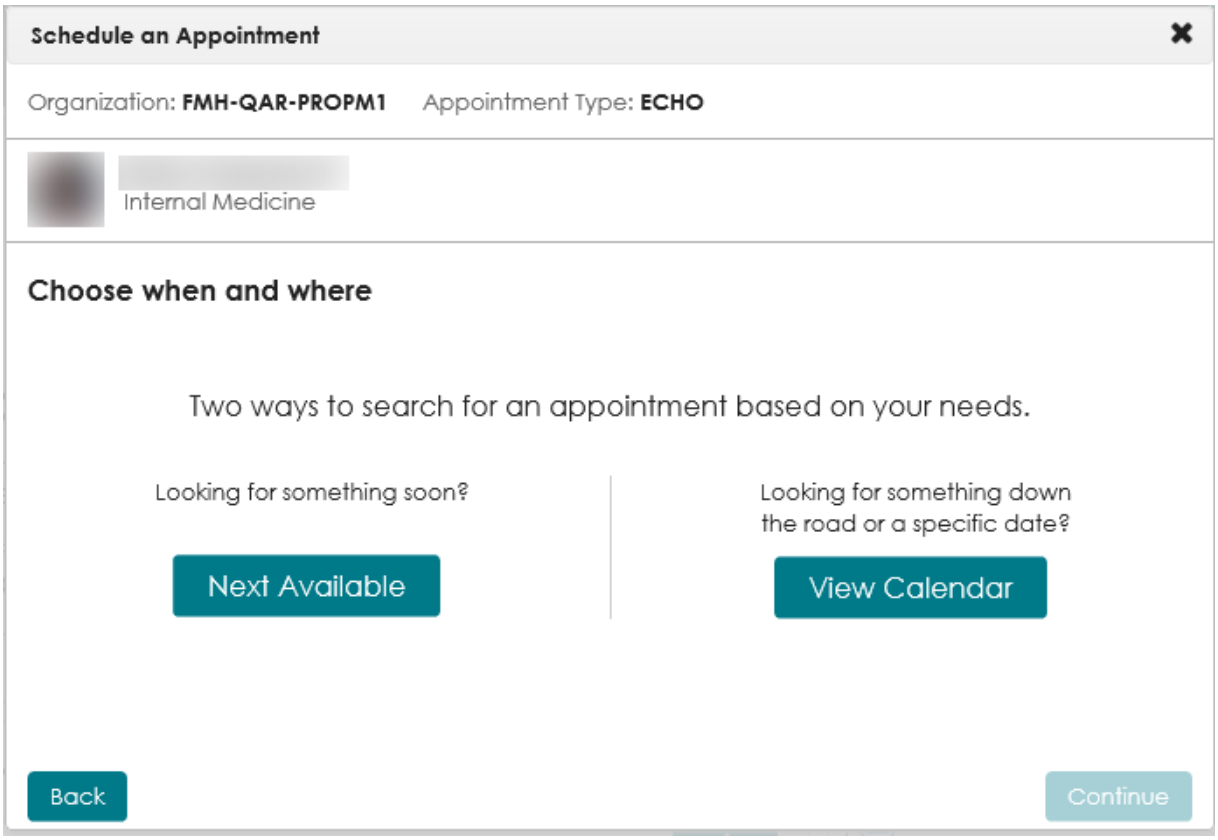


If you do not want to select a provider that is listed, click **Additional Providers**. You can request an appointment from the providers listed here who are available for new patient appointments.

4. Select a provider and click **Continue**.

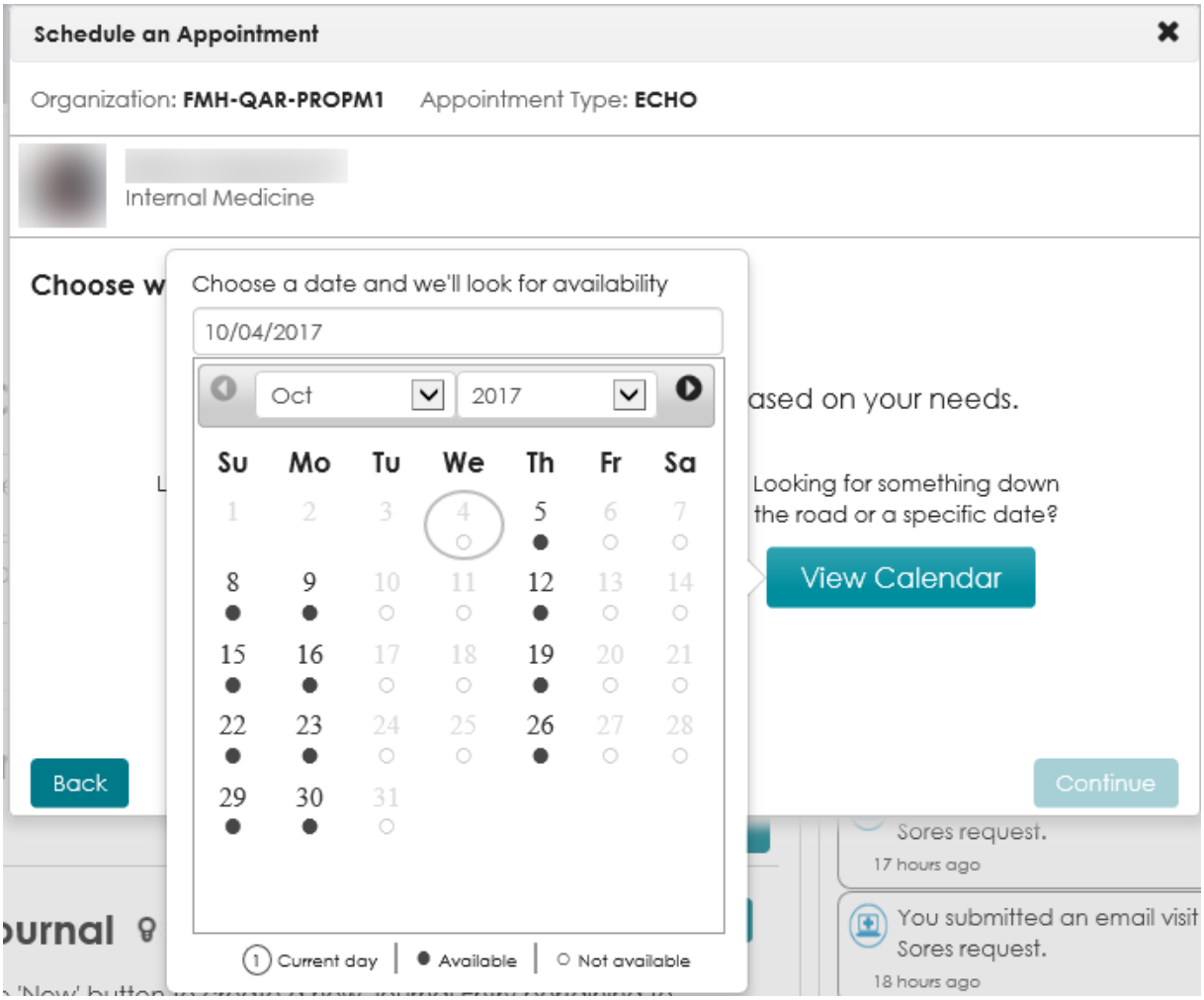
   Choose when and where is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



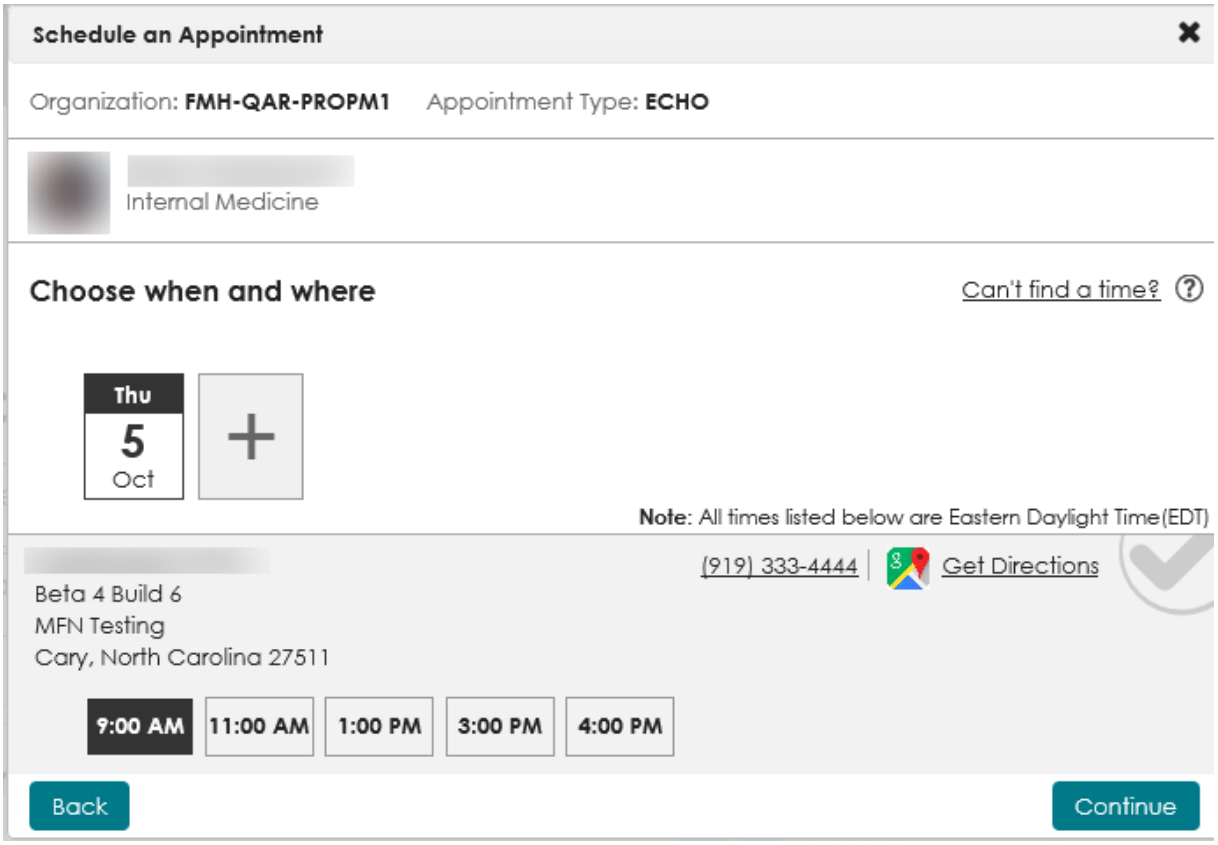
5. Click **View Calendar** to select an appointment date.
   The calendar tool is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



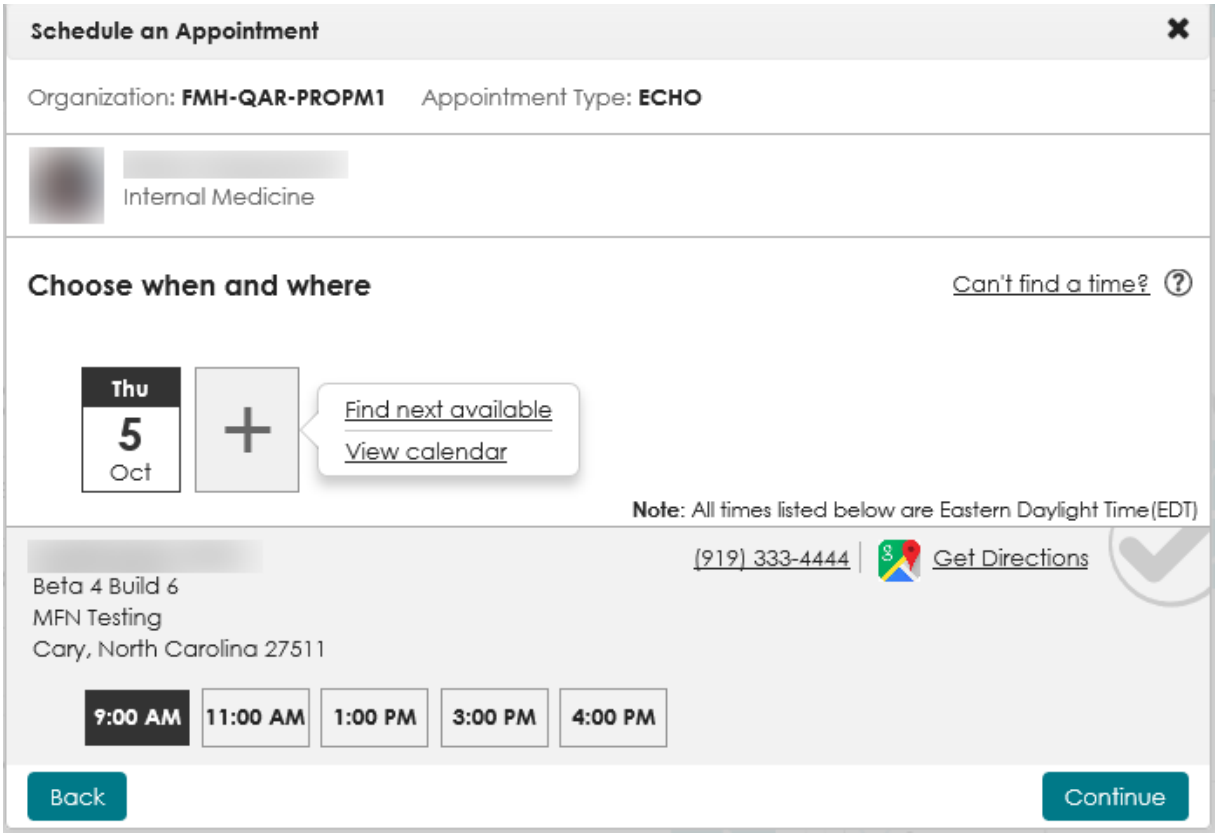
6. Select an available date from the calendar.
   The date and available times are displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



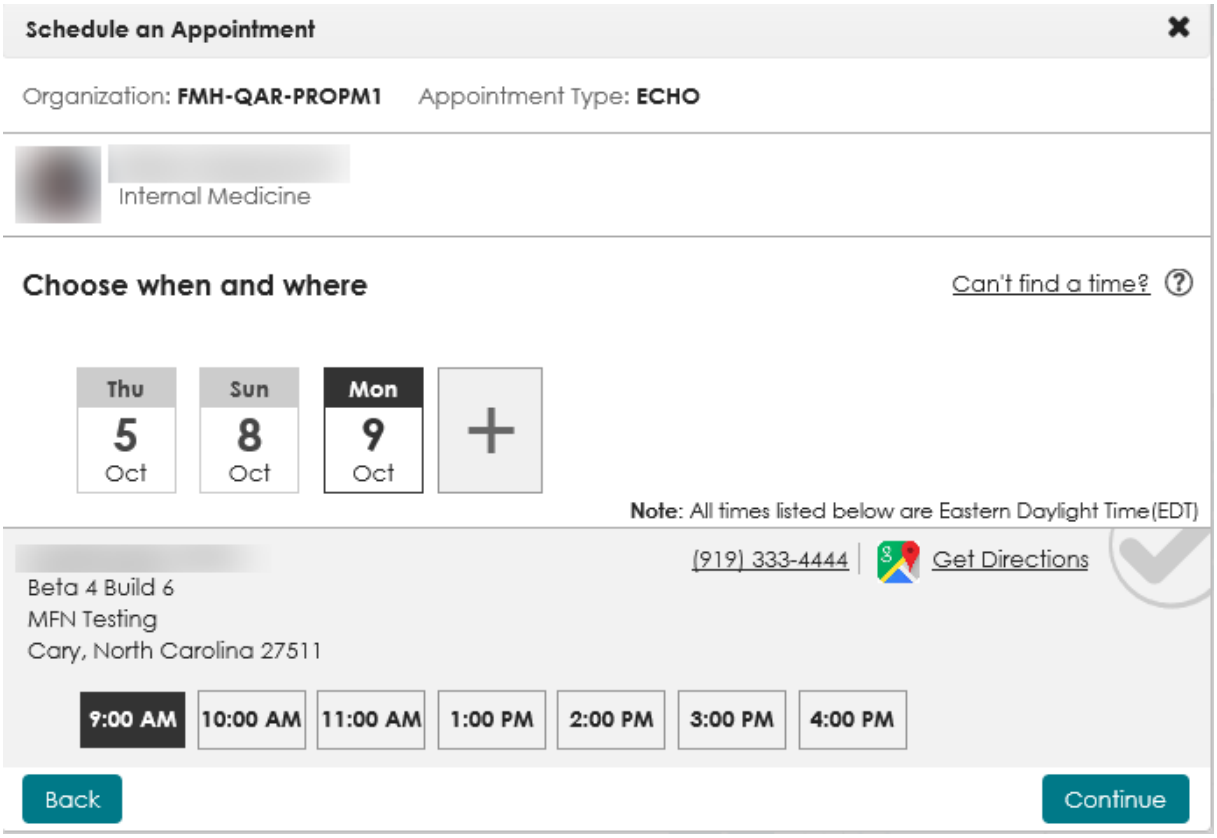
7. To view more available dates and times, click the plus sign box, and select **Find next available** or **View calendar**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



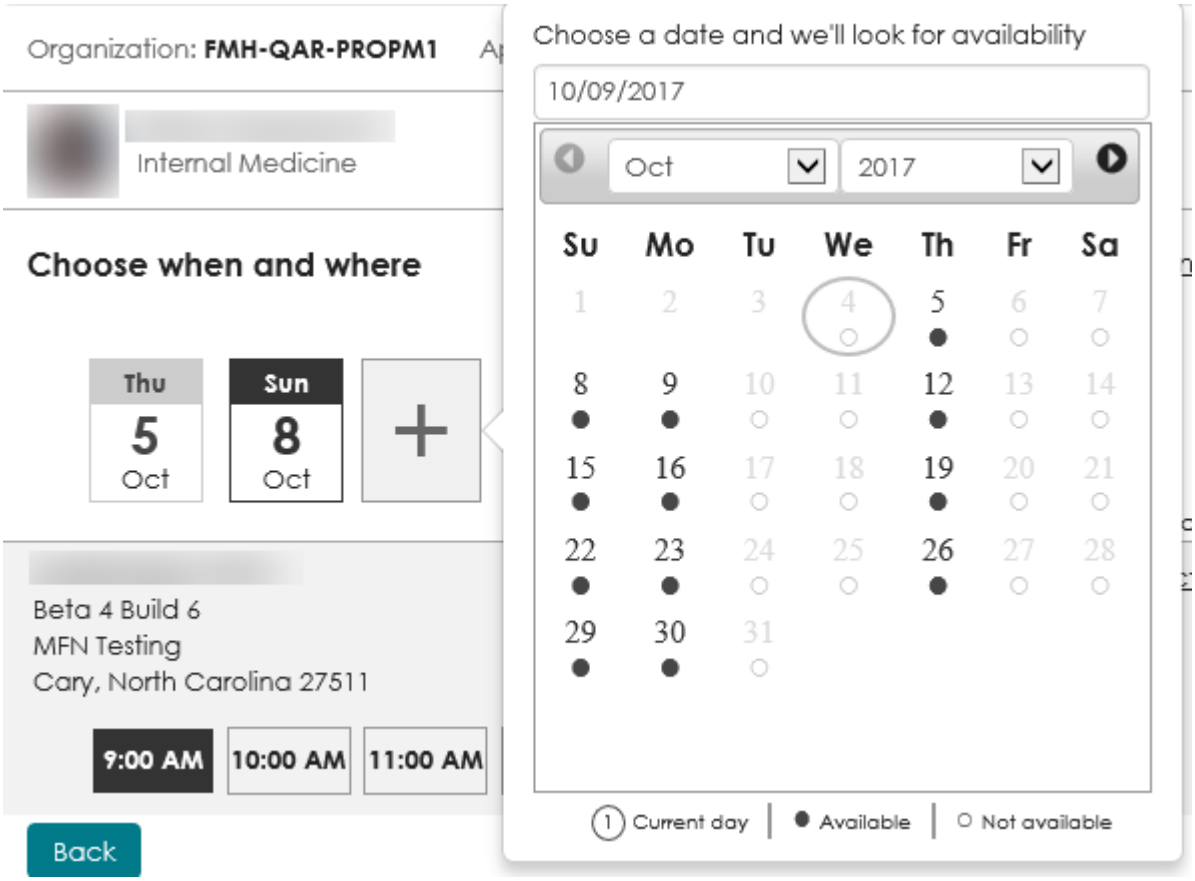
When you click **Find next available**, the next available date is automatically added to **Choose when and where** as illustrated in the following image.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



When you click **View calendar**, the calendar is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

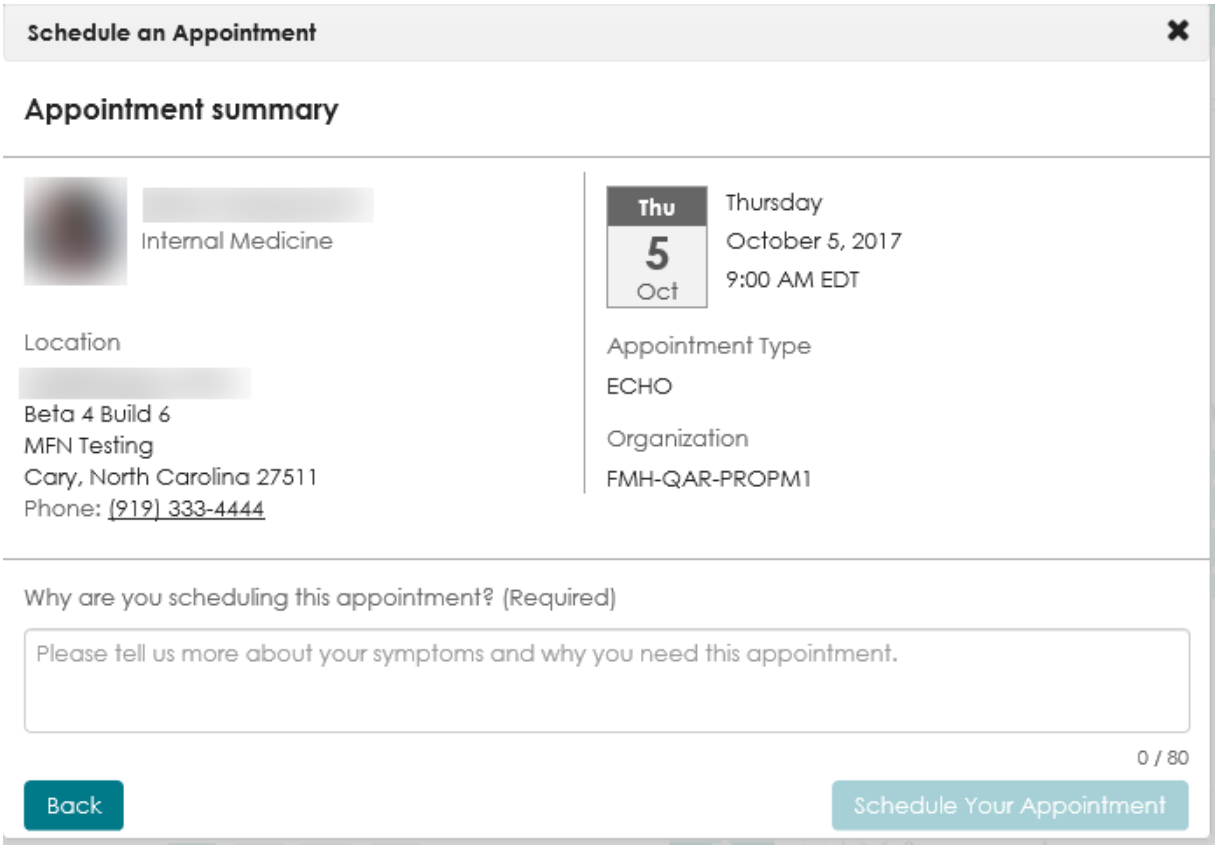


If you cannot find a date and time that matches your available criteria, you can request an appointment when you click **Can't find a time**. The request an appointment workflow starts where you can request appointment dates and times and your provider will contact your through a secure message as to what appointment is scheduled for you. See "Request an appointment" for more information about how you can request an appointment.

8. Select the appointment and time that you want.

   Appointment summary is displayed.

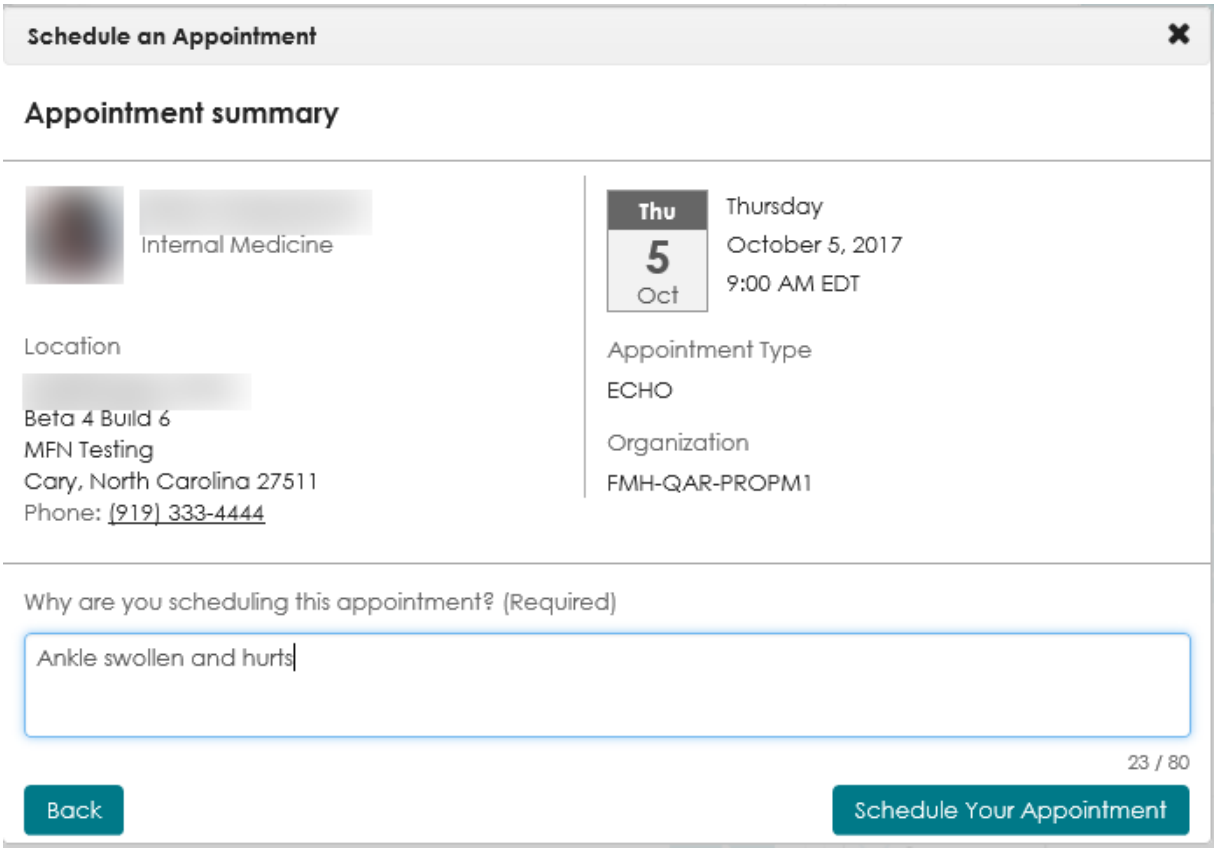
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



9. Enter the reason for the appointment in **Why are you scheduling this appointment**.

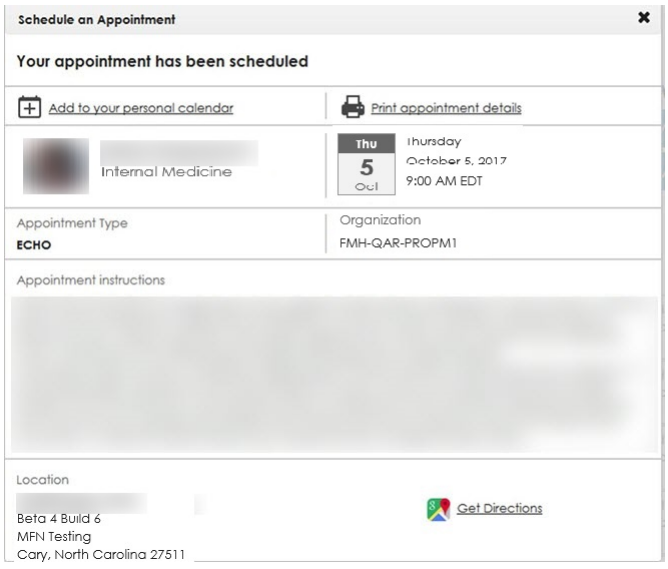
   Provide a short description of your health issue and reason for the visit. You are limited to 80 characters.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



10. Click **Schedule Your Appointment**.

    A message is displayed to confirm that you scheduled an appointment.



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

You have reserved an appointment with your provider. The appointment takes a few minutes to post to your health record.

> **Important:** If another patient simultaneously reserves an appointment for this time slot, you are notified that the time slot is no longer available, and you must select a new appointment time.

What to do next

You can add the appointment to your personal calendar or print the appointment information.

Click **Get Directions** to view a map and directions to your appointment location. Your provider might also include a photo of the appointment location.

View upcoming appointments

Future appointments are listed in the **Upcoming** tab located in the **Appointments** section.

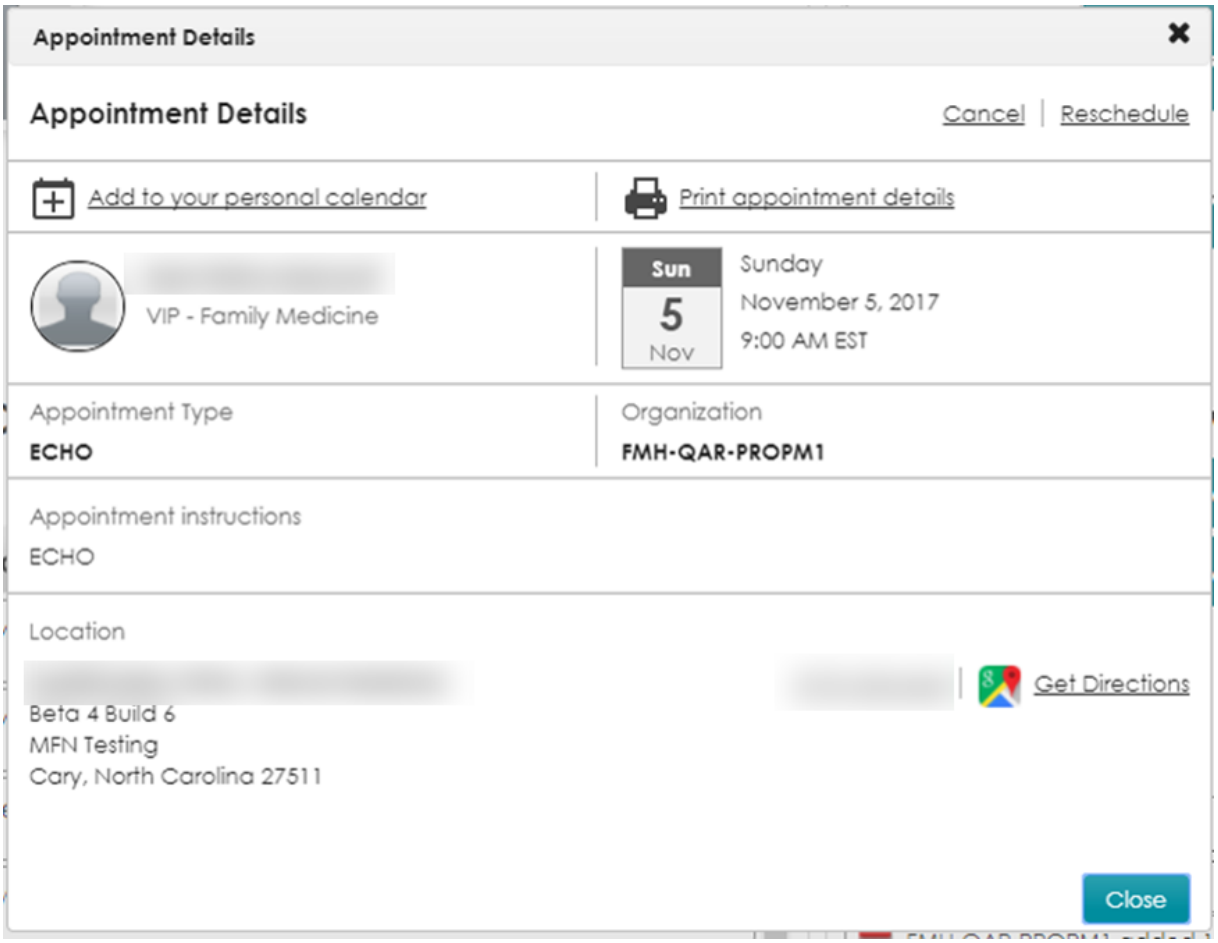
Your next 2 appointments are automatically listed. If you want to view an appointment that is scheduled for a later date, click **View More**.

1. Sign in to the patient portal.
2. From **Appointments**, click **Upcoming**.
3. Select an appointment in the list.

   A list of upcoming appointments is displayed.
4. Select an appointment.

   Appointment Details is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



The appointment information, such as date, time, location, appointment type, organization name, and provider name are displayed, along with a provider photo, if available.

A map and written directions are available if the appointment location is known. The directions are from your home address as known by the patient portal to the appointment location. If your organization has provided an image of the location, the image is displayed with the **Location** information.

5. (Optional) Click **Get Directions** for directions and a map to your appointment location.

   A new map and directions are displayed.

6. (Optional) Click **Add to your personal calendar** to add the appointment details to your calendar application.
7. (Optional) Click **Print appointment details** to print a summary of your appointment details.

   When you email, print, or fax your health record data from and appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through an encrypted eMail message.

Results of this task

You have viewed appointment details.

Reschedule an appointment

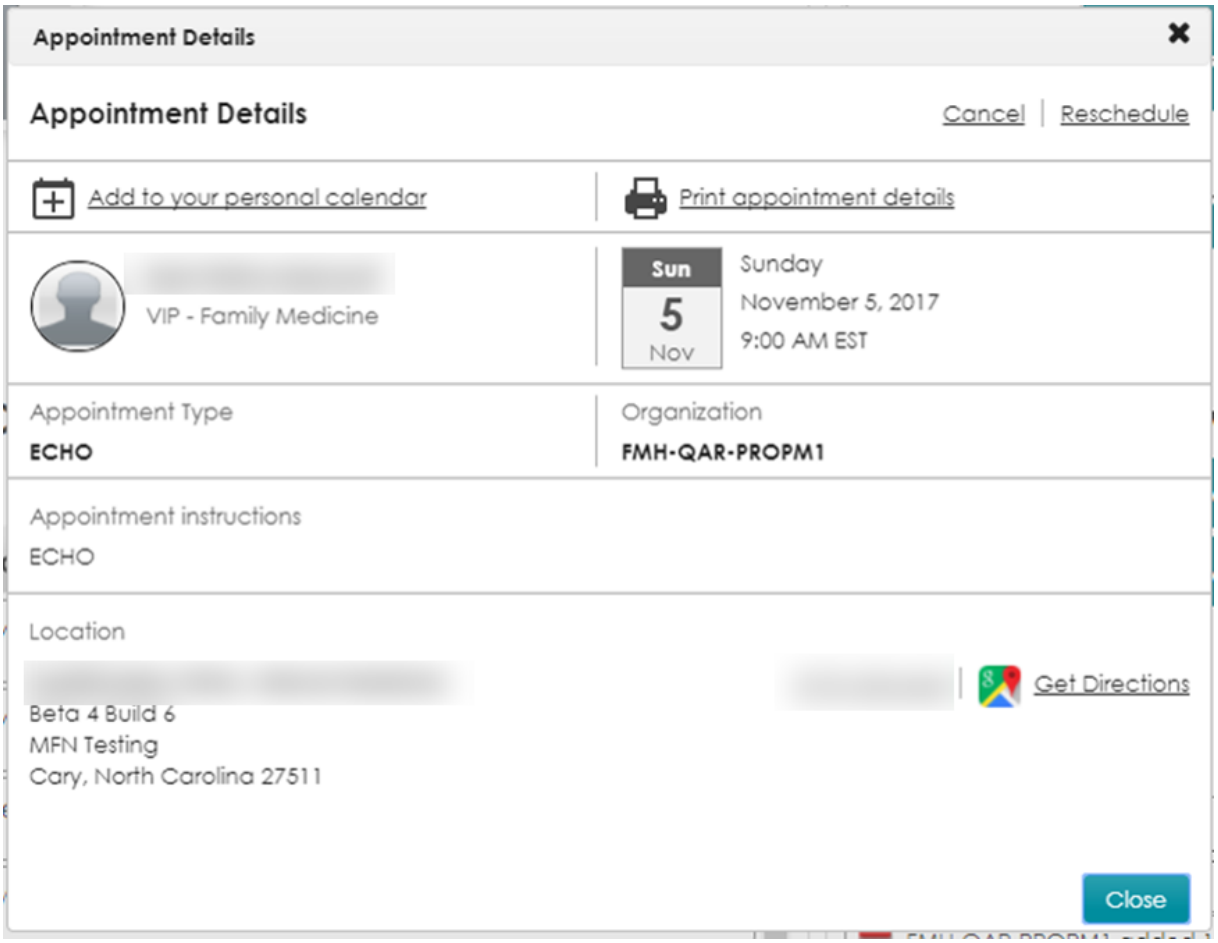
You can reschedule appointments if you find that your schedule conflicts or are unable to attend the appointment.

1. Sign in to the patient portal.
2. From **Appointments**, click **Upcoming**.
3. Select an appointment in the list.

   A list of upcoming appointments is displayed.
4. Select an appointment.

   Appointment Details is displayed.

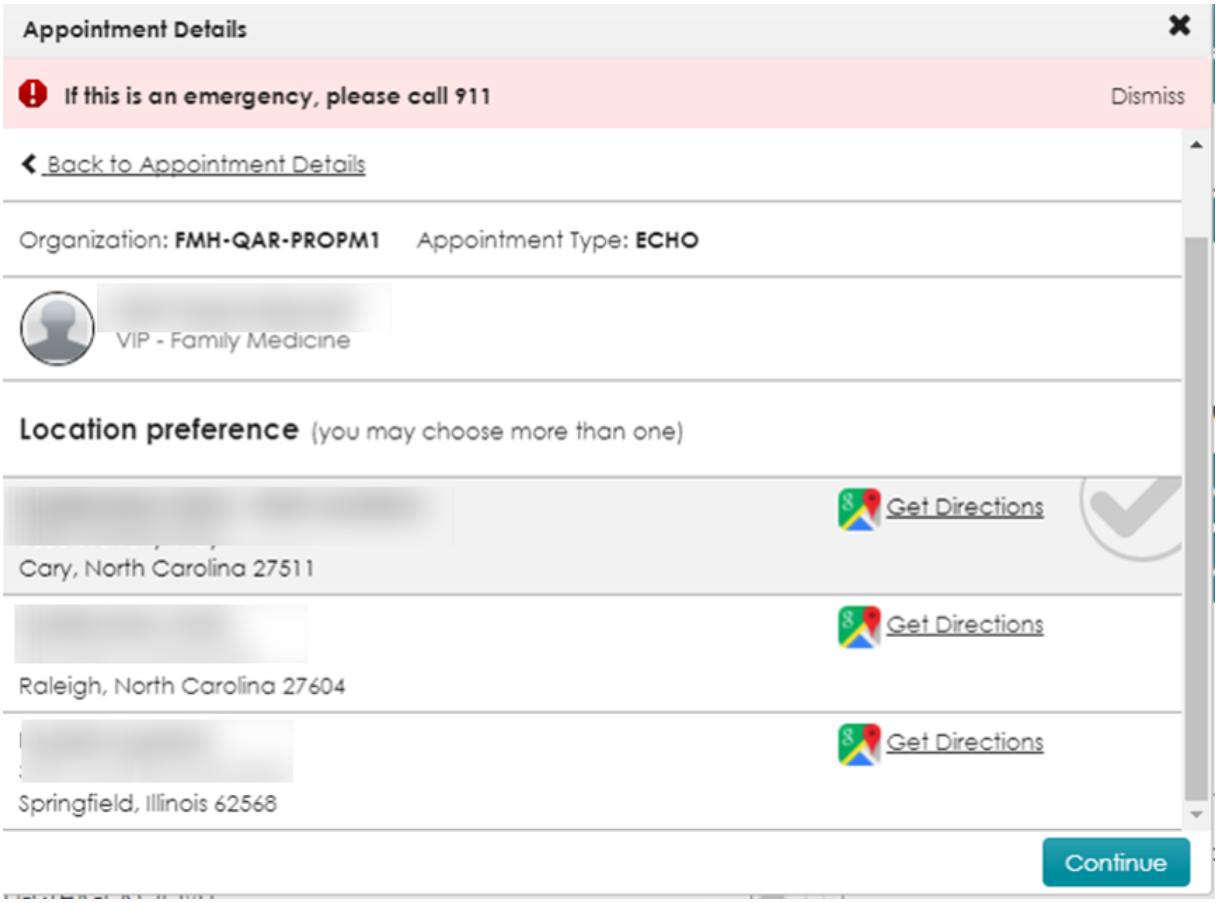
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Click **Reschedule**.

   Location preference is displayed.

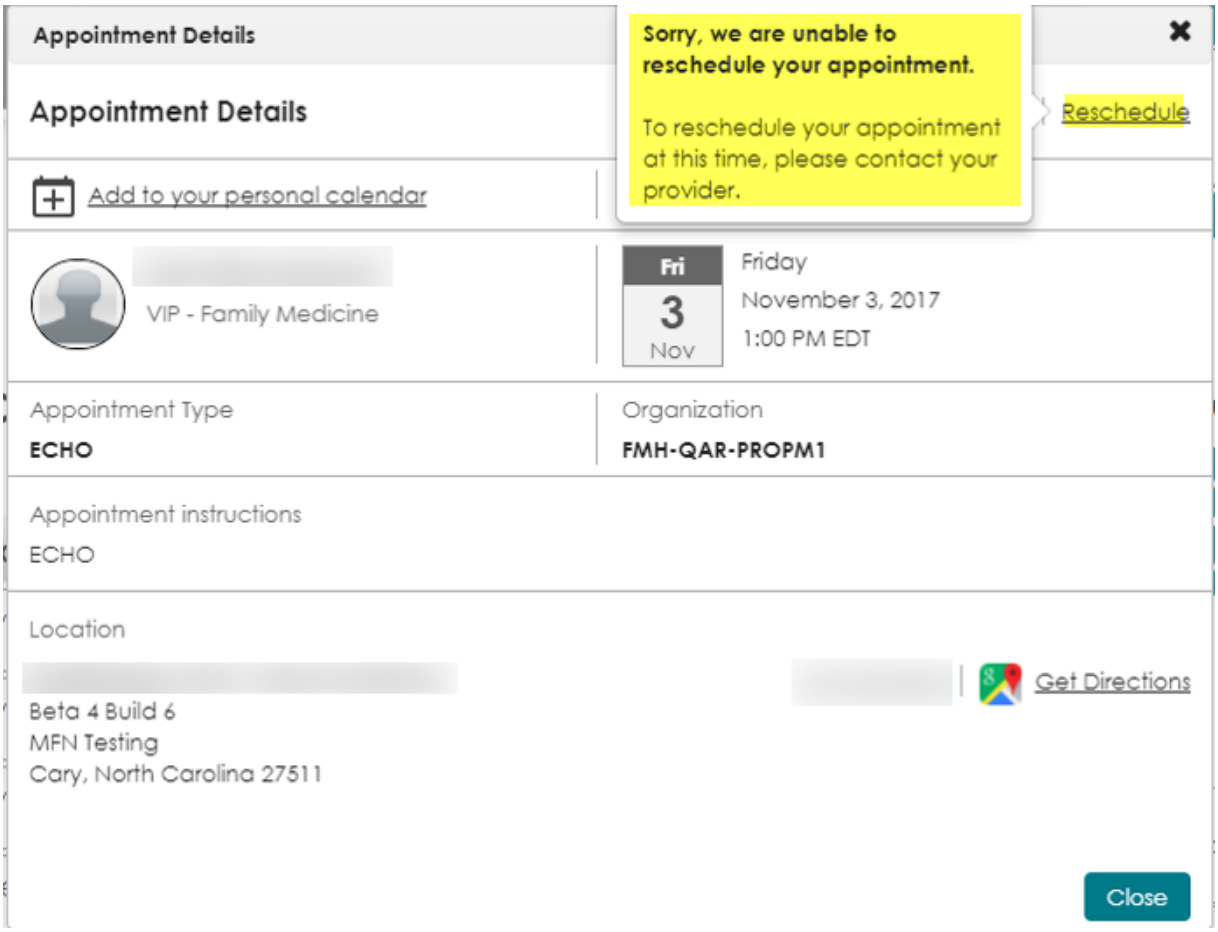
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



The organization and provider are automatically displayed based on the original appointment and cannot be changed.

If the time has past that the organization allows rescheduled appointments, a message is displayed as illustrated in the figure instead of **Location Preferences** displaying. You must call your provider to reschedule the appointment.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



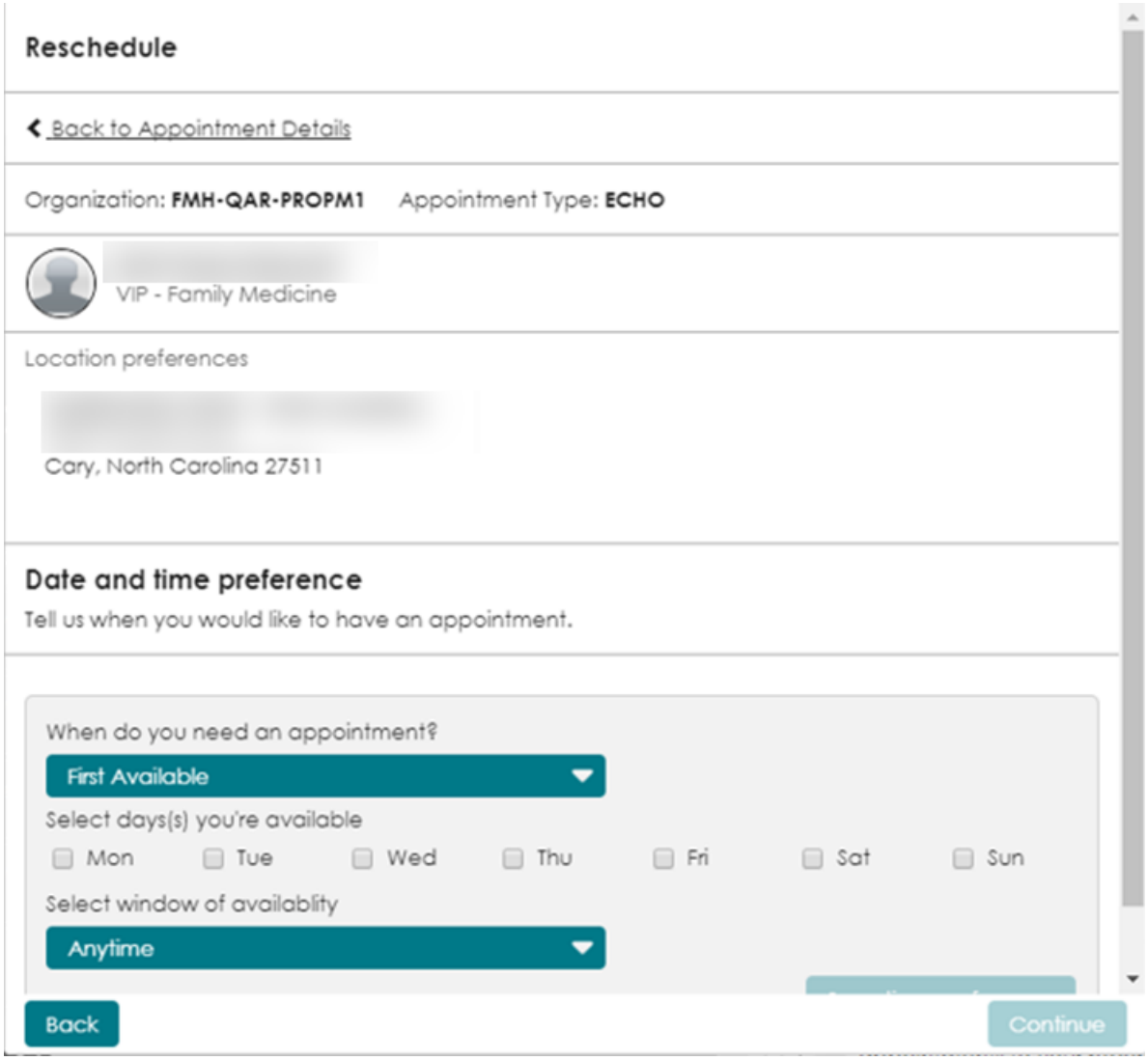
6. Select a location.

   You can select 1 or more locations. If you do not select a location, your organization assumes that you can be seen at any of the locations that are listed.

7. Click **Continue**.

   Date and time preference is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

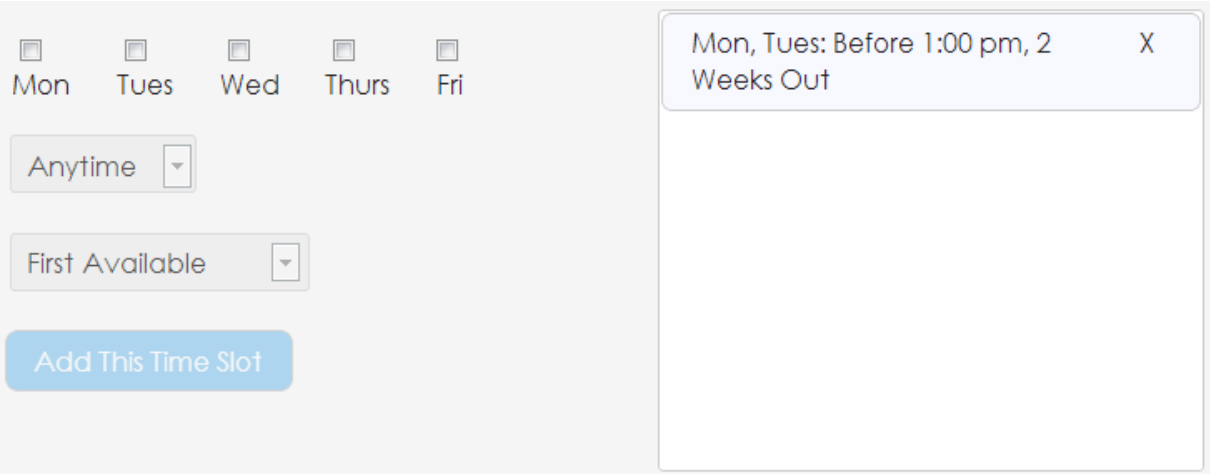


8. From **When Do You Want the Appointment**, select the check box preceding the day of week that you want the appointment.
9. From **Select window of availability**, select a time and availability.

   You can select a date up to 1 year in advance, when requesting a non-direct appointment.
10. Click **Add This Time Slot** for each appointment day and time selection.

    The appointment choices are listed in the box. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon × next to the list item.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



11. Click **Submit**.

    A message is displayed to remind you that the requested appointment is not scheduled until the appointment is posted in your health record and the provider sends a confirmation email.

12. Click **OK**.

    A secure message is sent to your provider requesting to reschedule the appointment. It might take a day for the appointment to be removed from the **Upcoming** tab. A **Pending Reschedule** label is displayed with the appointment on the **Upcoming** tab until the appointment is confirmed.

Results of this task

You have rescheduled an appointment.

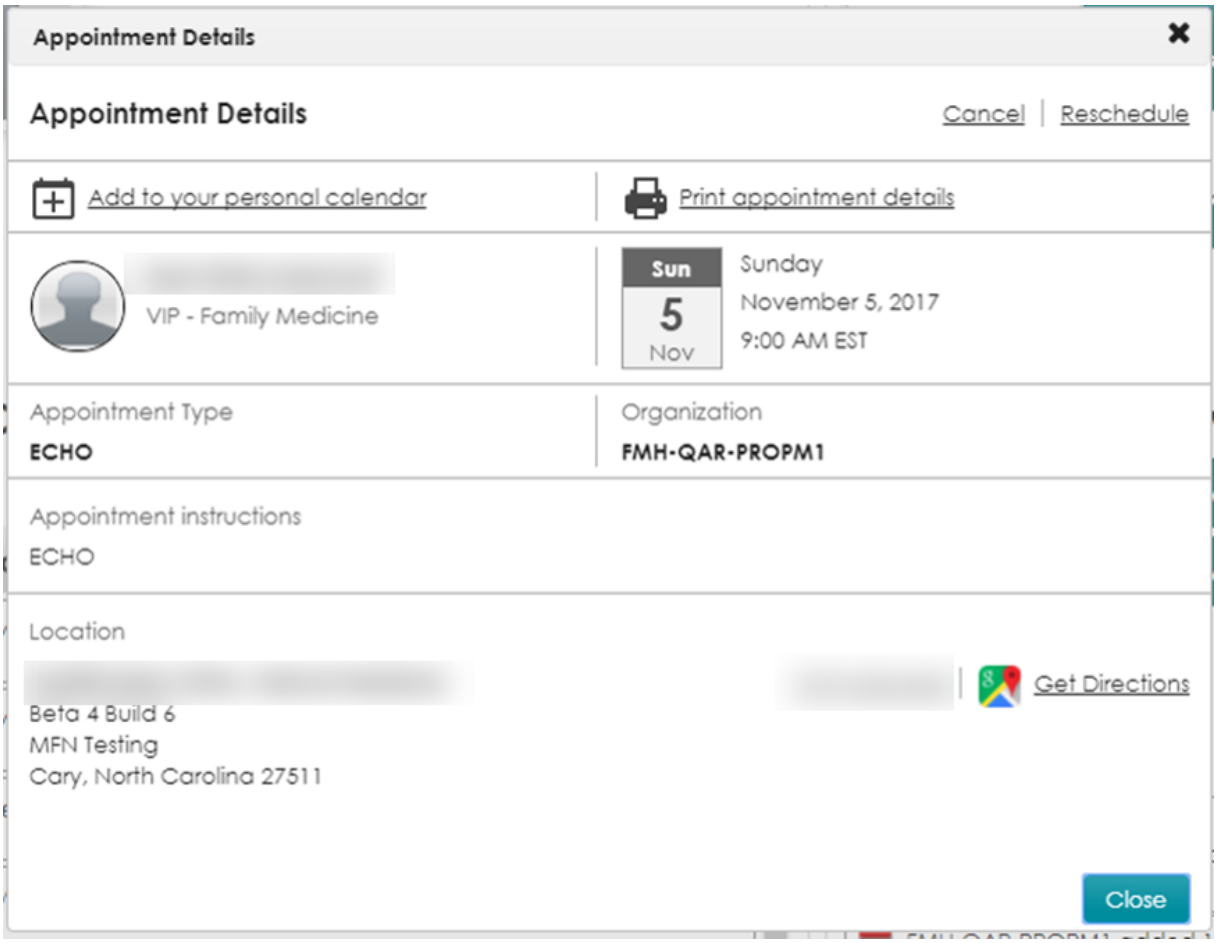
Cancel an appointment

Cancel appointments in the **Upcoming** tab located in the **Appointments** section on the **Home** tab.

1. Sign in to the patient portal.
2. Select an appointment from the **Upcoming** tab.

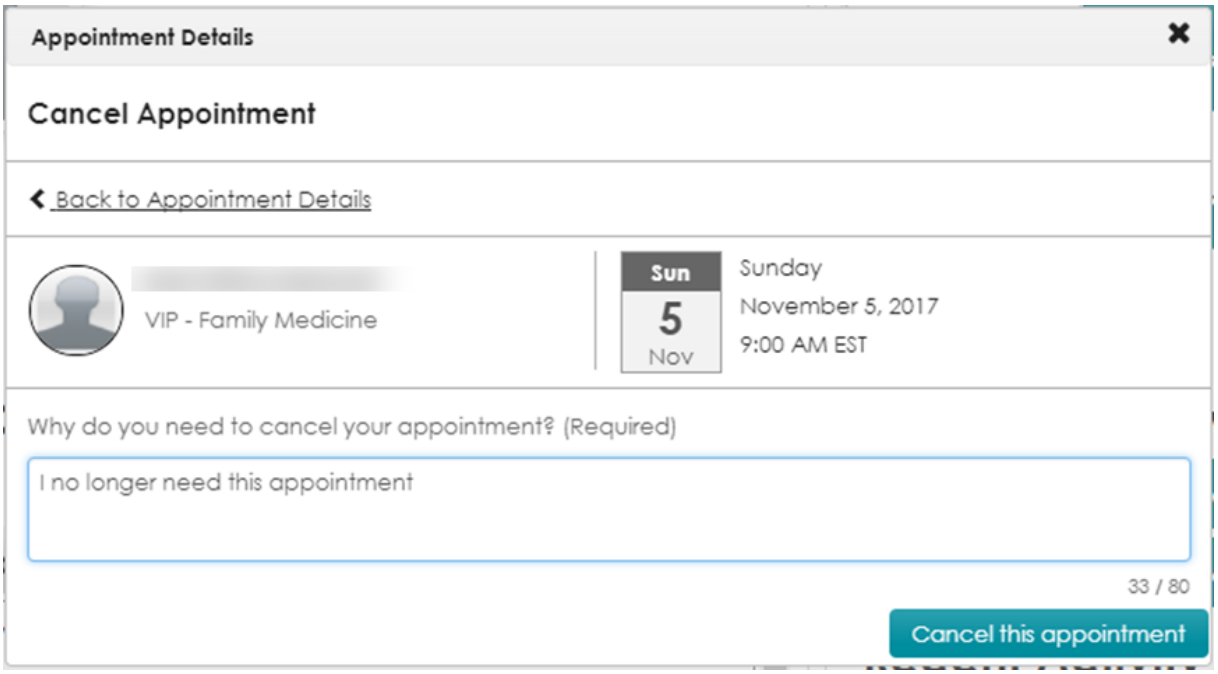
   Appointment Details is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

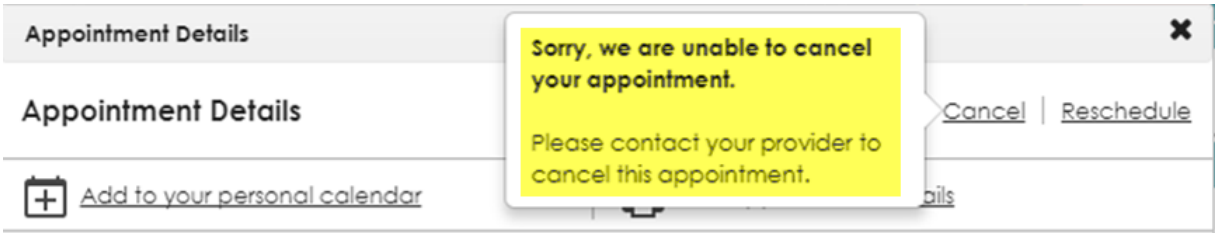


3. Click **Cancel**.
   Cancel Appointment is displayed.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



If the time has past that the organization allows to cancel appointments, a message is displayed as illustrated in the figure instead of the **Cancel Appointment** window. You must call your provider to cancel the appointment.



4. Enter a reason in the comments box to explain why you want to cancel the appointment and click **Submit**.

   The cancellation request is sent to your provider. A **Pending Cancellation** label is displayed with the appointment on the **Upcoming** tab until the appointment is cancelled.

Results of this task

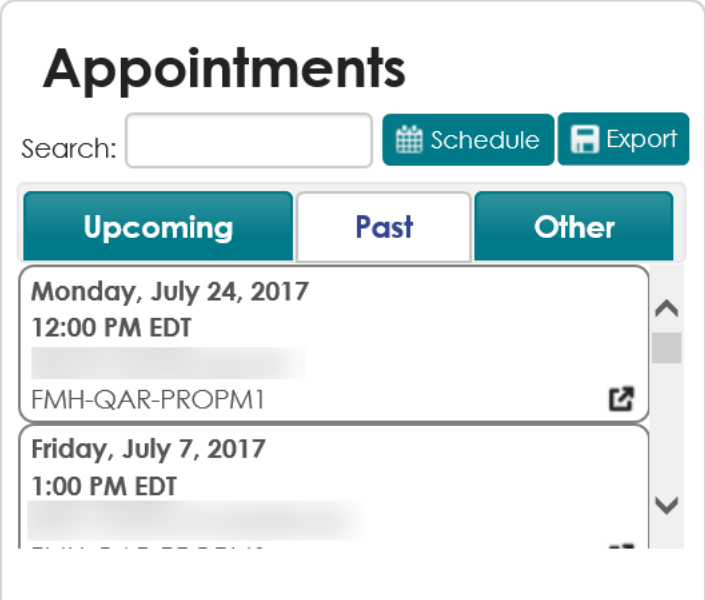
You have cancelled an appointment.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

View past appointments

Past appointment information is listed in the **Past** tab, located in the **Appointments** section on the **Home** tab.

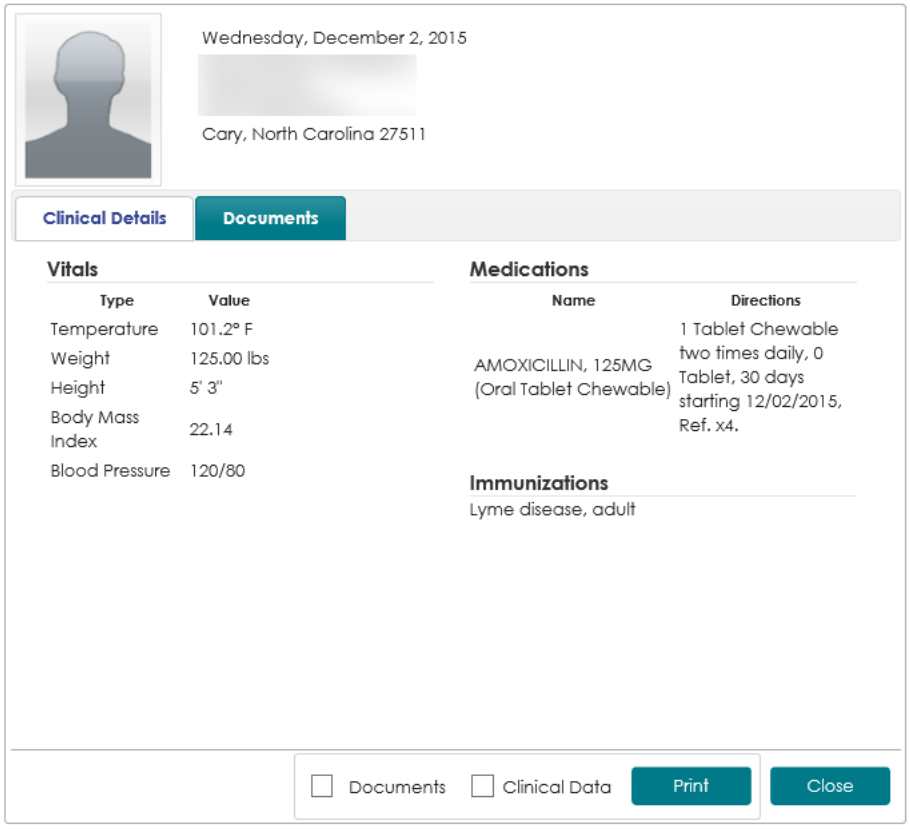
1. Sign in to the patient portal.
2. From **Appointments**, click the **Past** tab.



3. Select an appointment in the list.

   Appointment Details is displayed and the clinical details or documents associated with this appointment are displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



4. (Optional) Select **Documents** or **Clinical Data**, or both, to print a summary of your appointment details.
5. Click **Print**.

   When you email, print, or fax your health record data from and appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

   A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through an encrypted eMail message.

Results of this task

You have viewed past appointments and printed the details.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Billing on the Home tab

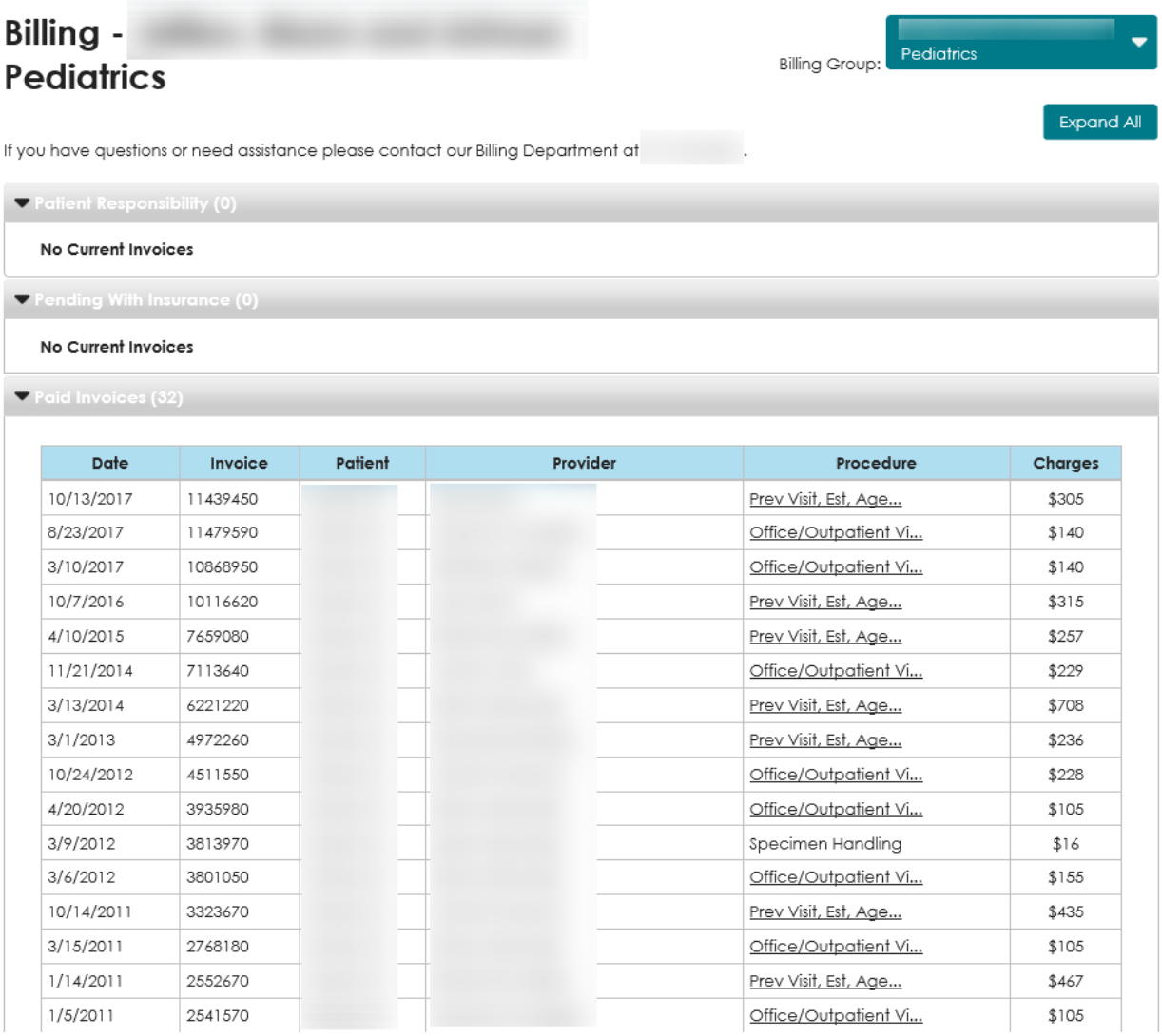
The **Billing** section is only available on the **Home** tab if your organization has the online bill pay feature enabled.

The charges and amount due are displayed on the **Billing** section by billing group, and **Amount Due** is updated with the first sign-in of the day.

To view your invoices or make a payment, click **Details**.

The **Billing** tab is displayed with **Patient Responsibility** expanded.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Expand other tabs to view billing details.

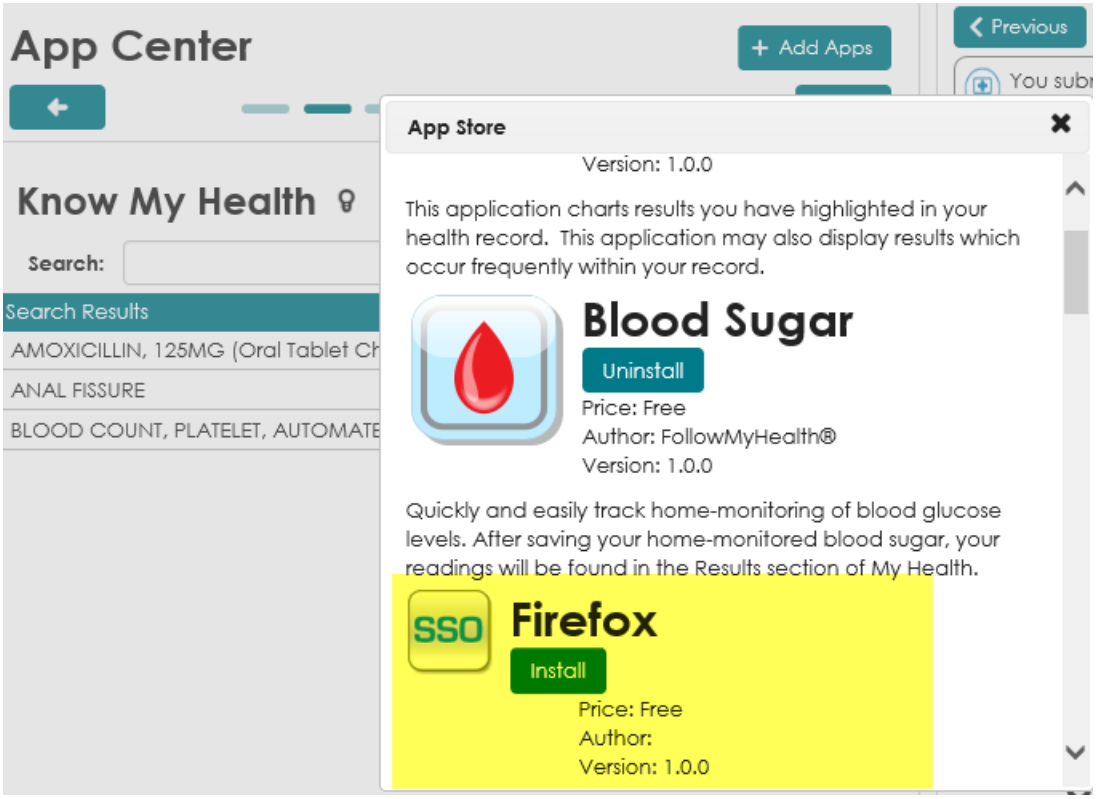
Single sign on

If your provider has a single sign on (SSO) application available in **App Center**, you can use the application to set up SSO between your FollowMyHealth account and third-party applications.

SSO enables you to sign in to a third-party application from FollowMyHealth.

If your provider has set up the application to automatically upload to FollowMyHealth, the SSO application is displayed in **App Center** and ready for you to use. Otherwise, you must install the application from **App Center**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



App Center

The **App Center** section on the **Home** tab provides access to applications that are installed on FollowMyHealth and enables you to install more applications.

The following applications integrate with FollowMyHealth and capture data to post to your health record.

- My Charts
- Health Journal
- Know My Health
- Blood Sugar

My Charts, Health Journal, and Know My Health are automatically installed for you when you create your account.

> **Attention:** Device applications, such as Telcare, Nokia, and iHealth®, are no longer connected to the patient portal through **App Center**. These applications and devices are available through **Devices & Apps** on the

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

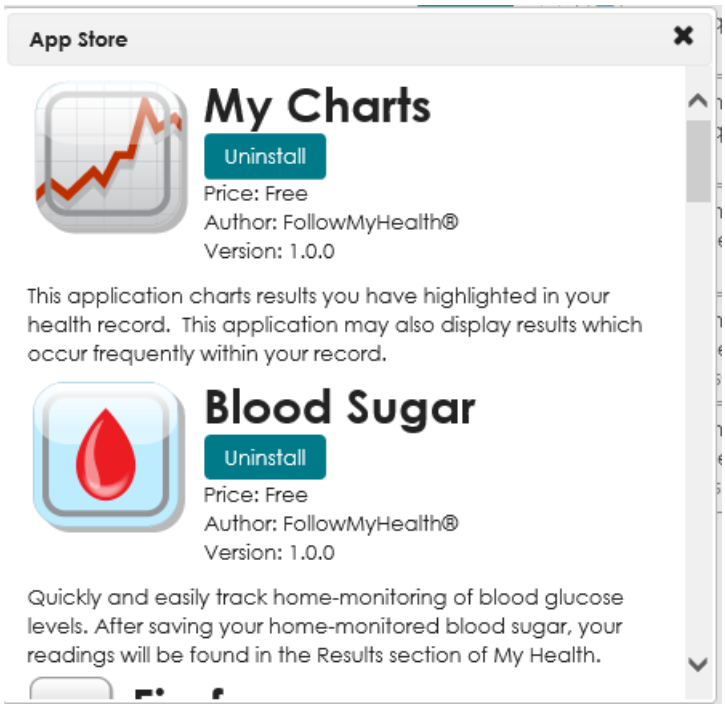
> **Home** tab or from **My Account > Connections > With Devices and Apps through Health Sources**.

When you open **App Center**, a message is displayed to inform you that the device connections are managed in **Connections**. Click **OK, I got it** to remove the message.

Install applications

1. Sign in to the patient portal.
2. From **App Center** on the **Home** tab, click **Add Apps**.

   App Store opens.



3. Click **Install** for the application that you want add.

   The application automatically installs and is available in the browser.

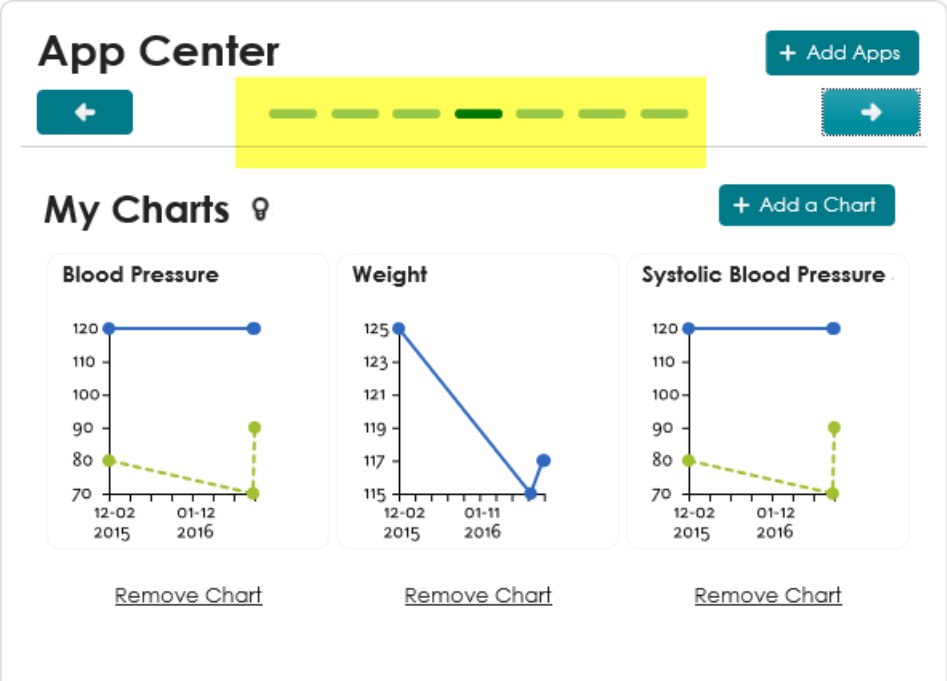
> **Note:** If you are installing the single sign on (SSO) application, a security and privacy disclaimer is displayed. You must click **Yes** to continue with the installation.

If you click **Uninstall**, the application is automatically removed and does not display when you browse your applications.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

What to do next

Each installed application is represented by a teal color dash icon.



Point to the dash icon to display the application name. When you click the icon, the application opens. Alternatively, use the backward and forward arrow icons to switch between applications.

Create a Health Journal entry

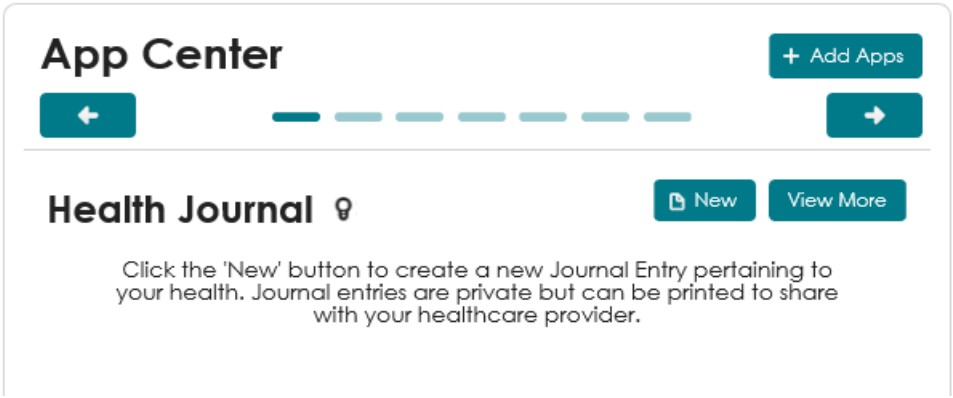
Health Journal is an application that provides an online journal for notes about your health.

> **Important:** Health Journal entries are never shared outside of your FollowMyHealth account, but you can print the entries to share with your provider.

1. Sign in to the patient portal.
2. From the **App Center** section on the **Home** tab, go to the Health Journal application.

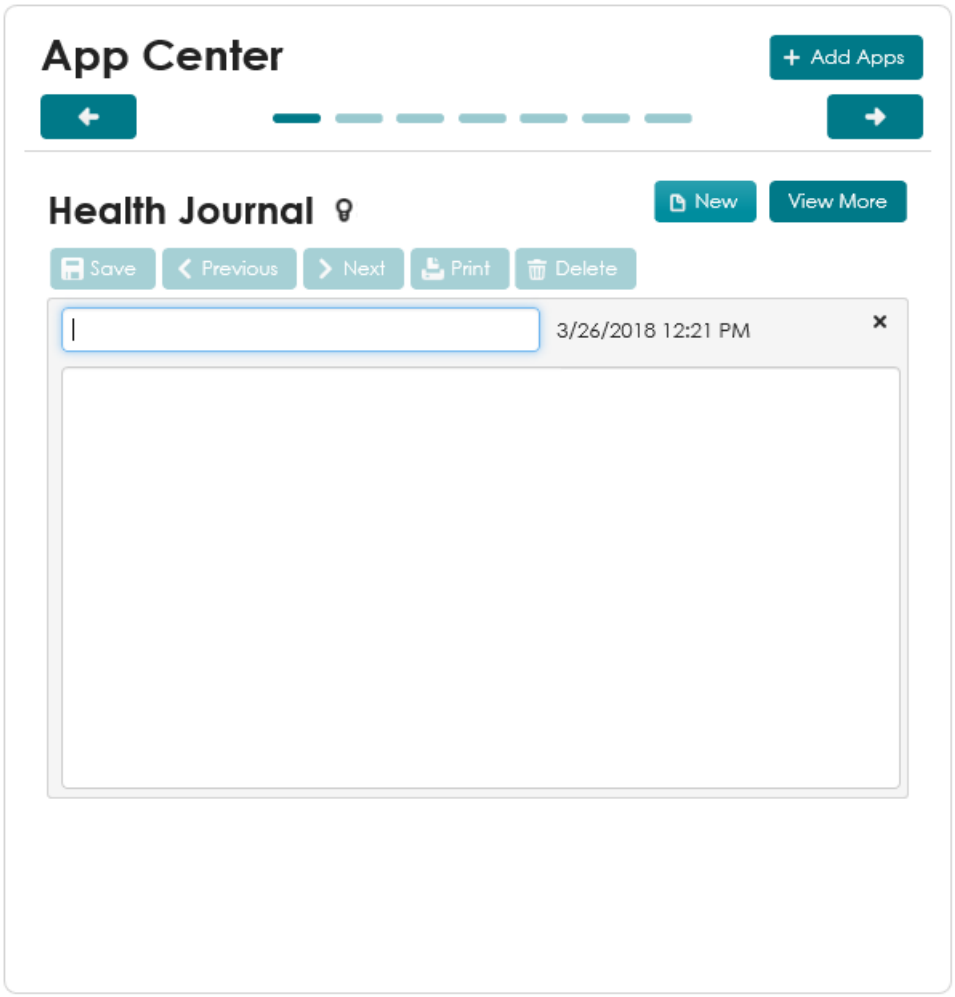
   The Health Journal application opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. Click **New**.

   A new journal window opens.

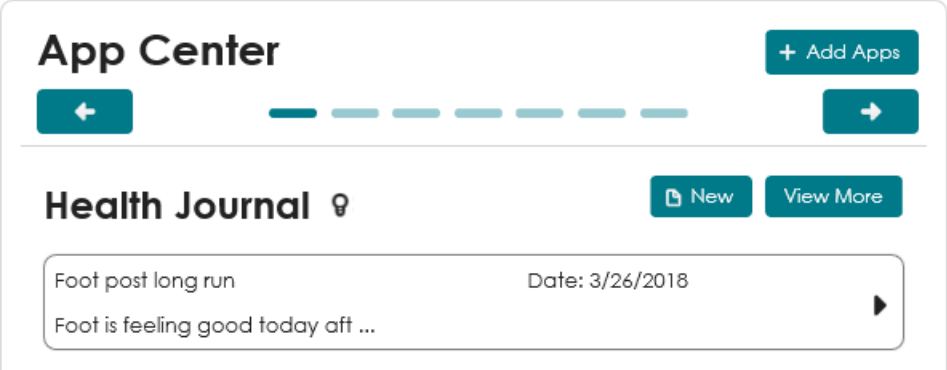


Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

4. Enter a title and notes for the journal entry.

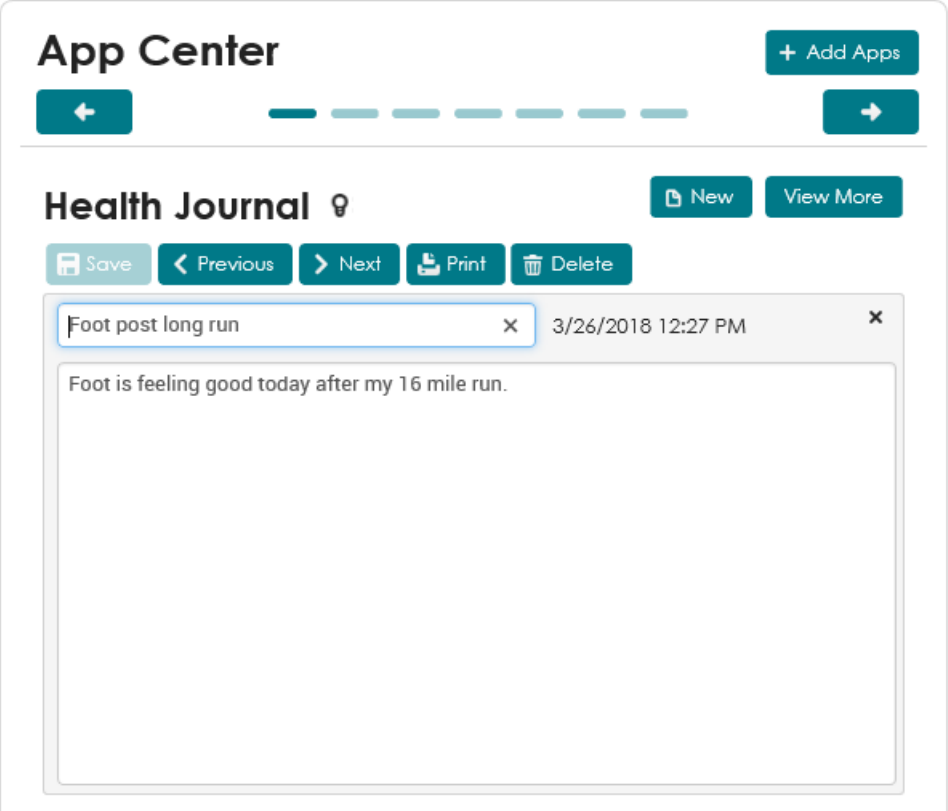
> **Remember:** Journal entries are private. The provider cannot read your entries.

5. Click **Save**.
   The journal entry is posted on the main page of the Health Journal application.



6. To view additional journal entries that are not displayed under Health Journal, click **View More**.
   The Health Journal window expands to include all journal entries.
7. Click a journal entry to open and view details.
   The journal entry opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



8. (Optional) To edit the entry, change the text or add more content to the entry and click **Save**.
9. (Optional) To print the journal entries to share with your provider, click **Print**.
10. (Optional) To delete a journal entry, click **Delete**.

    Click **Yes** to confirm that you want to delete the entry.

Results of this task

You have learned how to create a journal entry, view additional journal entries, and print and delete a journal entry.

Manage My Charts data

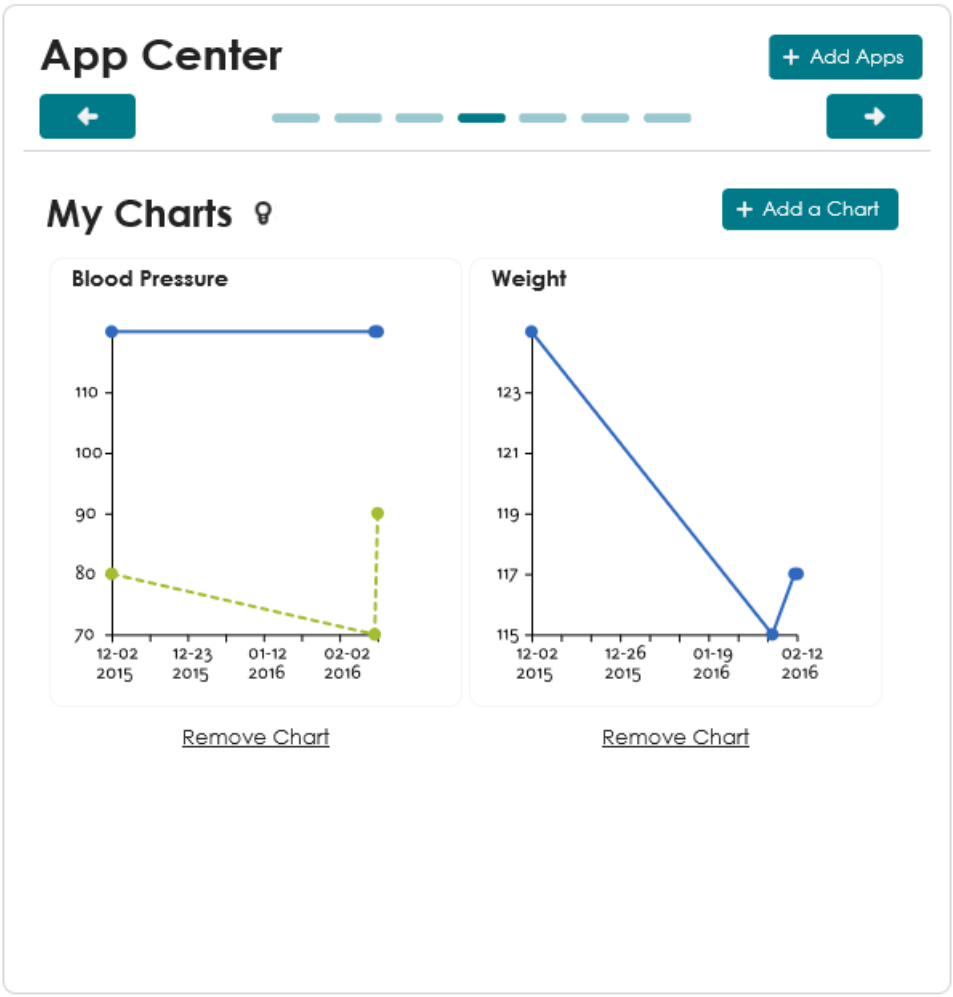
The My Charts application automatically displays charts for weight, blood pressure, and the top most-resulted item in your FollowMyHealth account.

These charts are the default view if each item has more than 3 data points. If any of the automatically-graphed items has less than 3 data points, the graph does not display.

If you add your own vital signs at home, they are displayed the next time you sign in.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

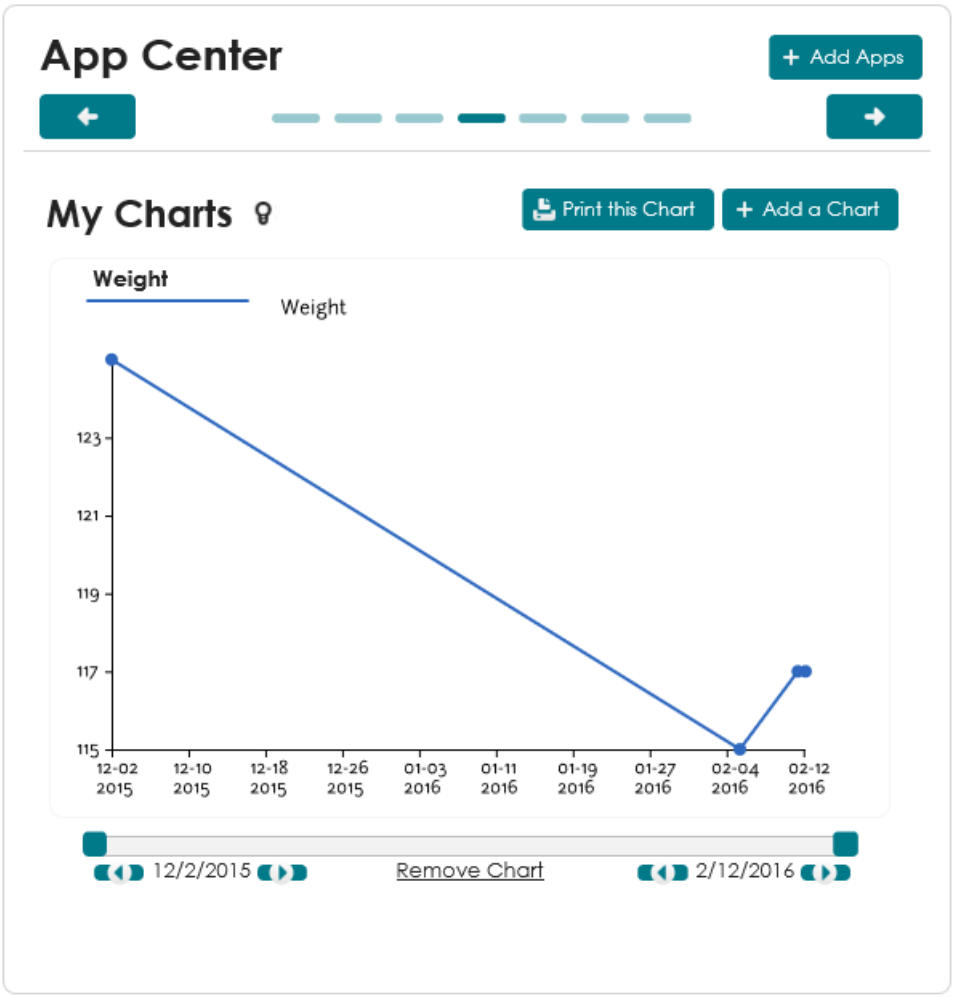
1. Sign in to the patient portal.
2. From the **App Center** section on the **Home** tab, go to the My Charts application.



The My Chart application is displayed.

3. Click the chart that you want to view details for.
   The chart is displayed.

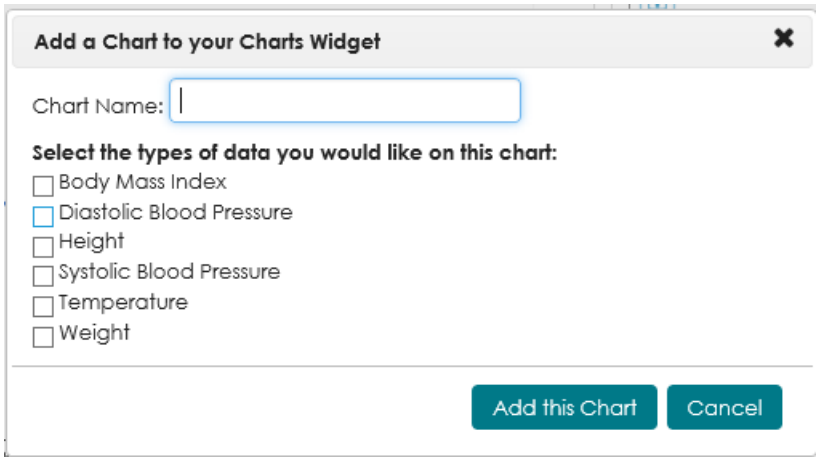
Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



4. (Optional) To print the chart, click **Print this Chart**.
5. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.
6. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.
7. Click the graph title to return the graph back to the thumbnail size.
8. To add a chart, click **Add a Chart**.

   Add a Chart to your Charts Widget opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



9. Select the type of data that you want to include in the chart.

   You can add any result type or vital sign that has more than 3 data points. You can also select more than 1 item for a single chart.

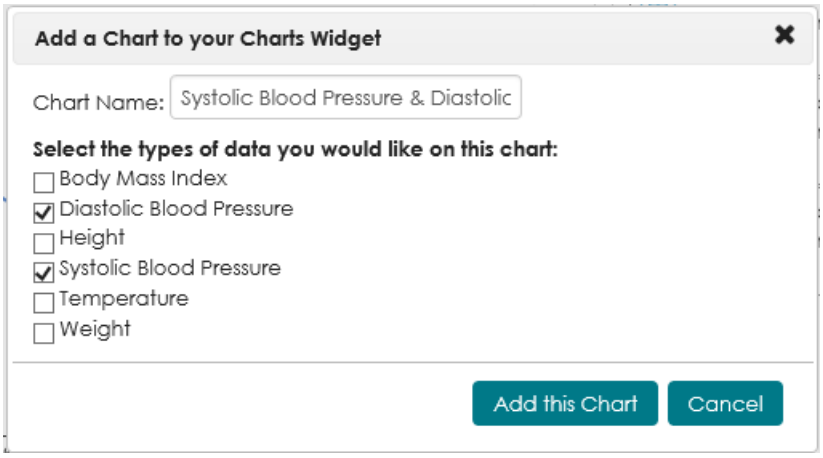
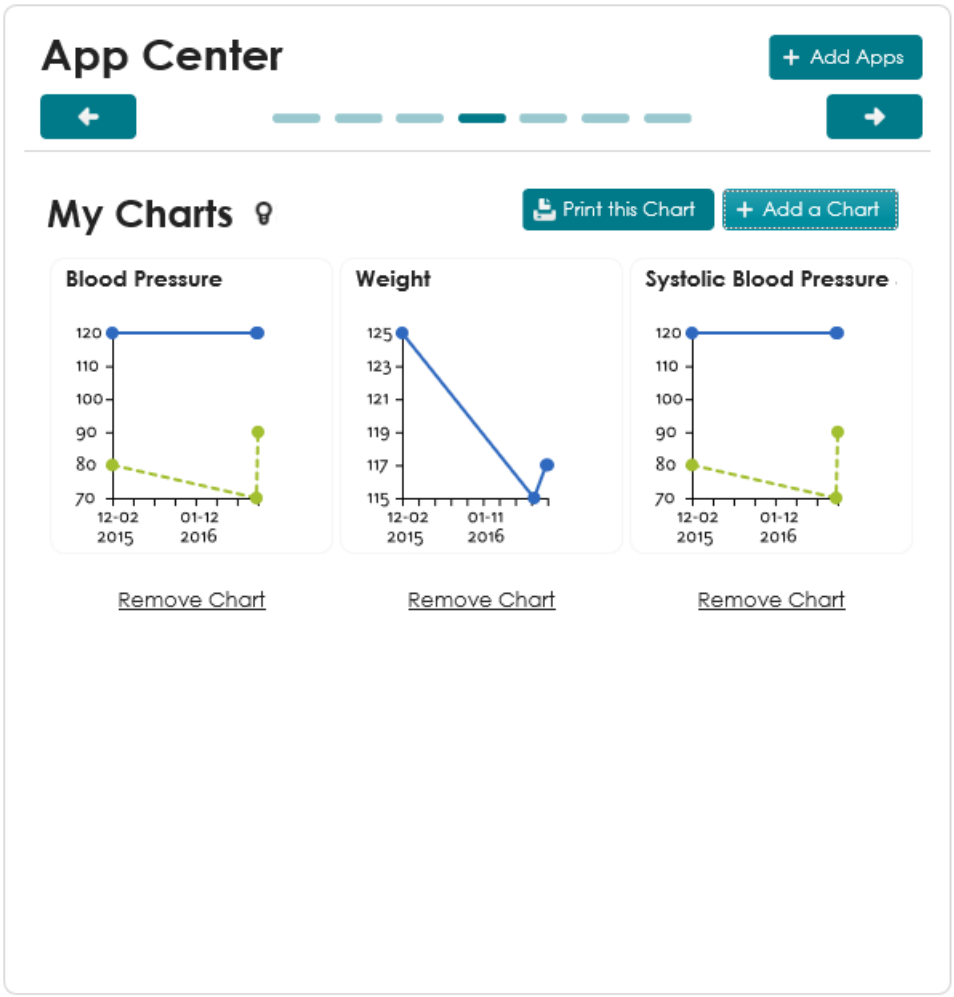


   Chart Name is automatically added by the application, based on the items that you selected.

10. Click **Add this Chart**.

    The new chart is added to the My Charts application.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

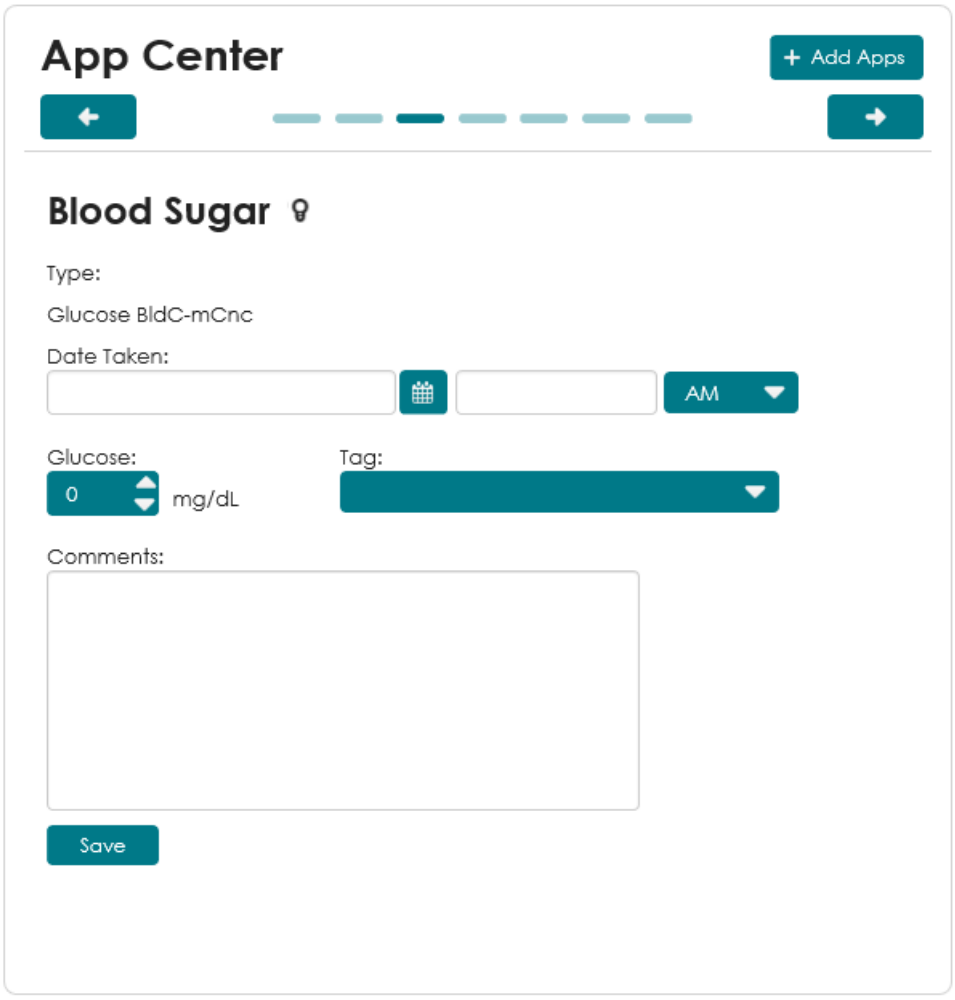


Enter a blood sugar reading

Use the Blood Sugar application to manually enter your blood glucose reading in your patient portal account.

1. Sign in to the patient portal.
2. From **App Center** on the **Home** tab, go to the Blood Sugar application.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. For **Date Taken**, enter the day that the reading was taken.
   You can use the calendar view to select your date.
4. Enter the time of day that the reading was taken and select **AM** or **PM**.
5. For **Glucose**, enter the blood glucose reading value.
6. For **Tag**, select when the blood glucose reading was taken.
   For example, before a meal, before bed time, before an activity, and so on.
7. Click **Save**.
   A window opens with the message `Blood Sugar result saved`.
8. Click **OK**.

Results of this task

You have entered a blood sugar reading. The reading is sent to **My Health > Results**.

Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Know My Health

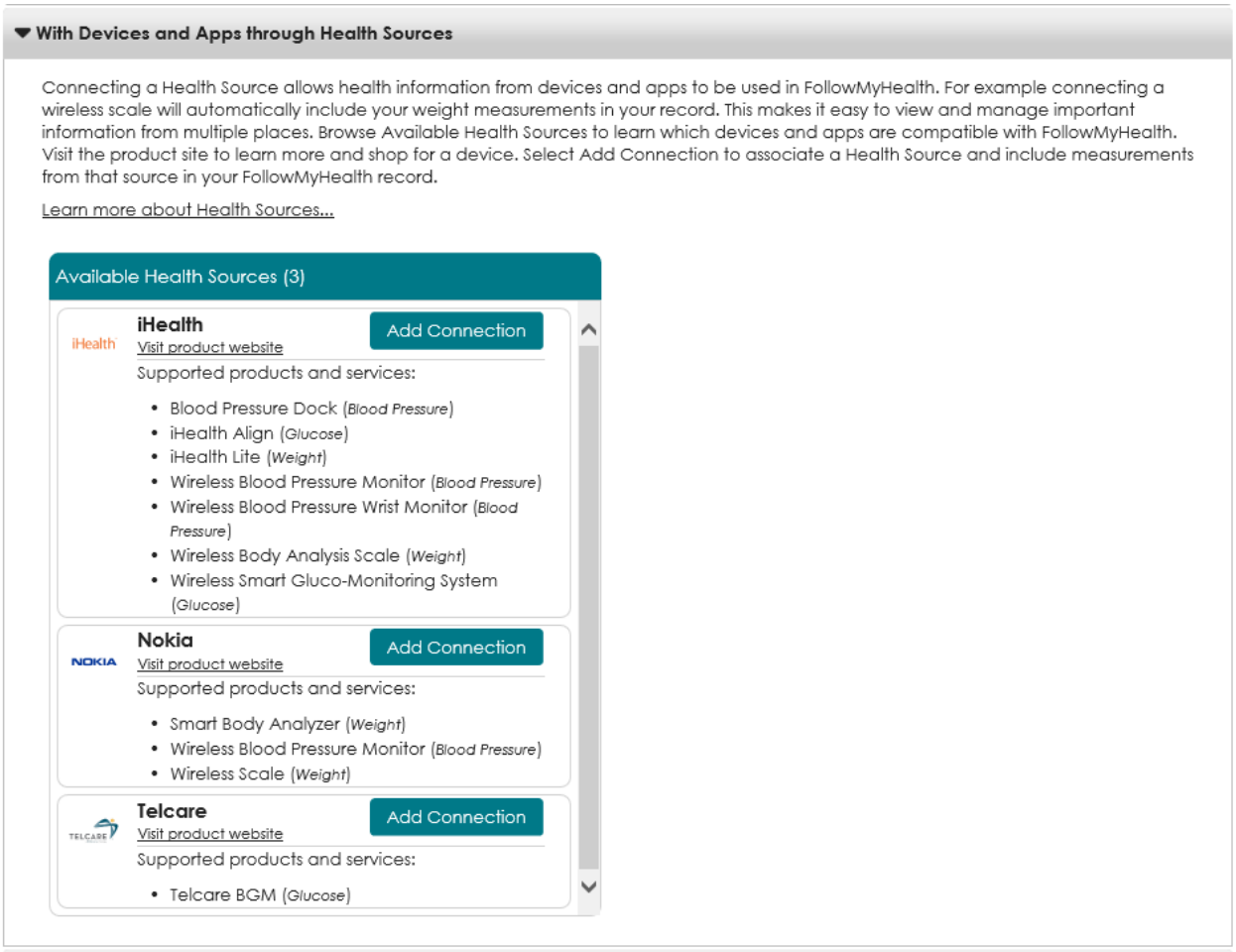
Know My Health is an enforced application in **App Center** that exists for all patients with a FollowMyHealth account. Know My Health provides patient education materials from MedlinePlus that can be printed or emailed.

Know My Health includes a search tool that searches matches by name only, not article content. You can also filter Know My Health by education type, such as **Conditions**, **Medications**, or **Results**. When you click an item in the Know My Health application, associated education content from MedlinePlus opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Devices and applications

Devices & Apps is a device application library that you can use to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account.



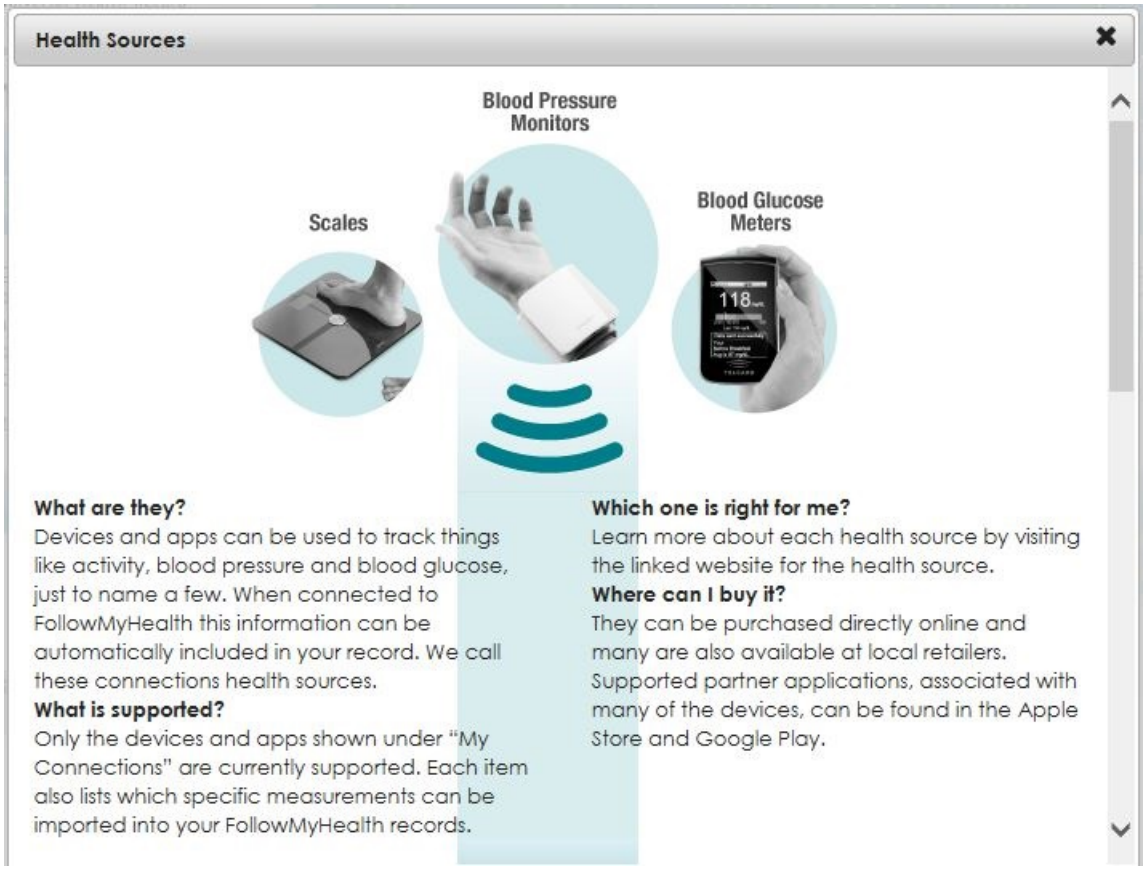
You can browse **Available Health Sources** to find devices and applications that are compatible with FollowMyHealth, such as Nokia, Telcare, iHealth®, and so on. After you complete the connection process, the health source is displayed under **Your Connected Health Sources**.

Devices & Apps provides several ways to access more information about the types of products that can connect with FollowMyHealth, including information about supported products, how to purchase products, and a quick guide to connect the applications and devices.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Learn more about devices and applications

Click **Learn more about Health Sources** to open a quick reference about devices and applications.



Visit product website

Click **Visit product website** from any connected health source to be directed to the product website where you can purchase devices and learn more about the products.

Supported products and services

Click **Supported products and services** from any connected health source to view a list of devices that are supported by FollowMyHealth. Click **Hide Supported products and services** if you do not want the list expanded in **Devices & Apps**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Access devices and applications from My Account

You can access **Devices & Apps** from the patient portal **My Account** menu.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements, the readings are viewable in the patient portal. A list of your most recent readings are also available on the **Home** tab.

1. Sign in to the patient portal.
2. From the patient portal, click **My Account > Connections**.
   Connections opens.
3. Click **With Devices and Apps through Health Sources**.
   With Devices and Apps through Health Sources expands.

Results of this task

You have accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

Access devices and applications on the Home tab

You can access **Devices & Apps** from the patient portal **Home** tab.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements, the readings are viewable in the patient portal. A list of your most recent readings is also available on the **Home** tab.

1. Sign in to the patient portal.
2. From the **Devices & Apps** section on the **Home** tab, click **Devices & Apps**.

> **Note:** If you are not connected to at least 1 health source, click **Connect a Health Source**. You are directed to **Connections** where you can view available devices and applications.

Connections opens and **With Devices and Apps through Health Sources** is expanded.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task
You have accessed **Devices & Apps**.

What to do next
You can now view readings, remove connections, add connections, learn more about devices and applications, or access product web sites for devices.

Access devices and applications from a goal

You can access **Devices & Apps** from your active goals in the **Goals** tab.

Before you begin
The **Goals** tab is only displayed if your provider has enabled the goals feature.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements for your goal that your provider set for you, the readings are viewable in the patient portal.

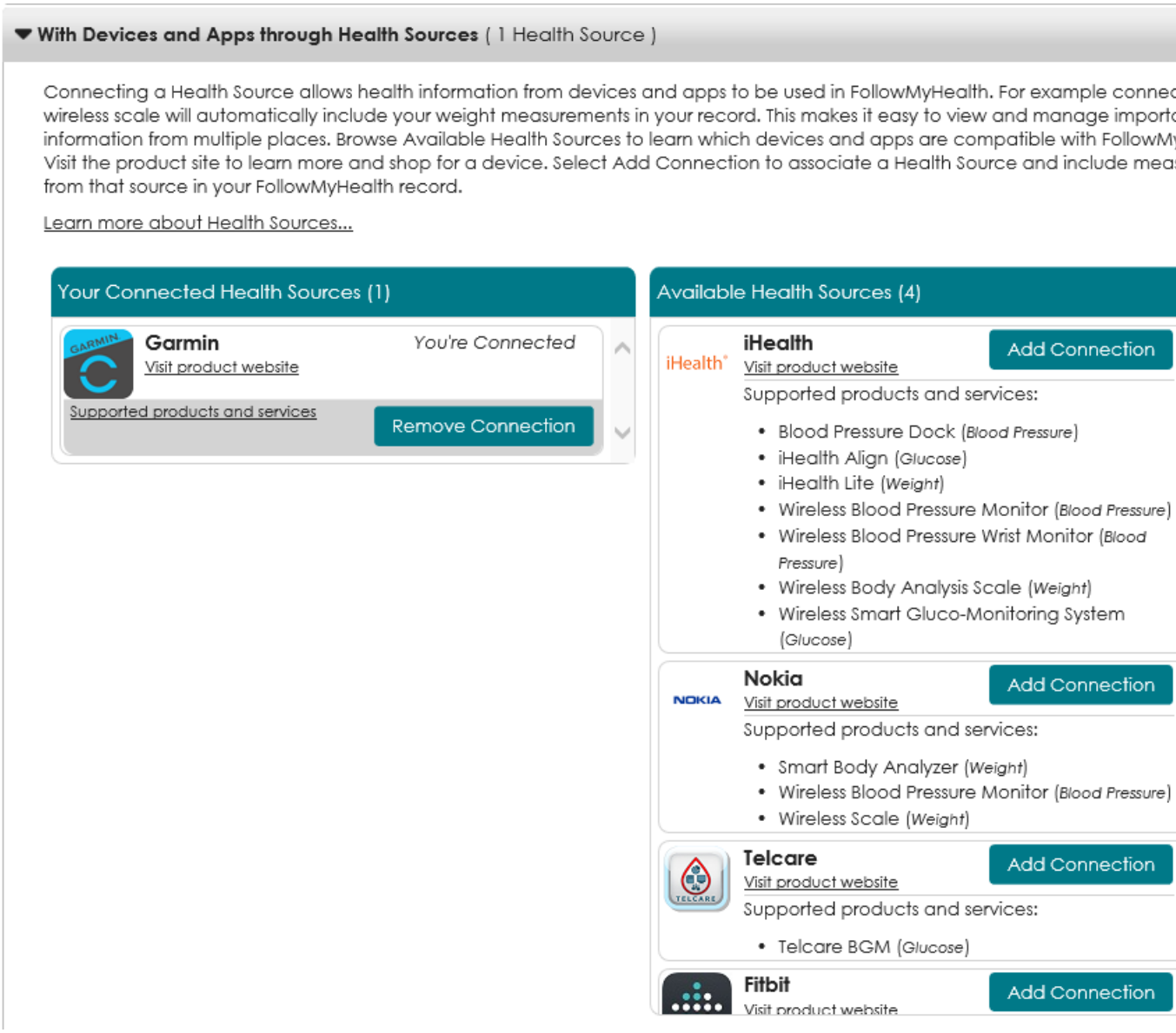
1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Goals** tab.

   The **Goals** tab is displayed.
4. Expand **Active Goals**.
5. From an active goal, click **Devices & Apps**.

   Connections opens and **With Devices and Apps through Health Sources** expands.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Results of this task

You have accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

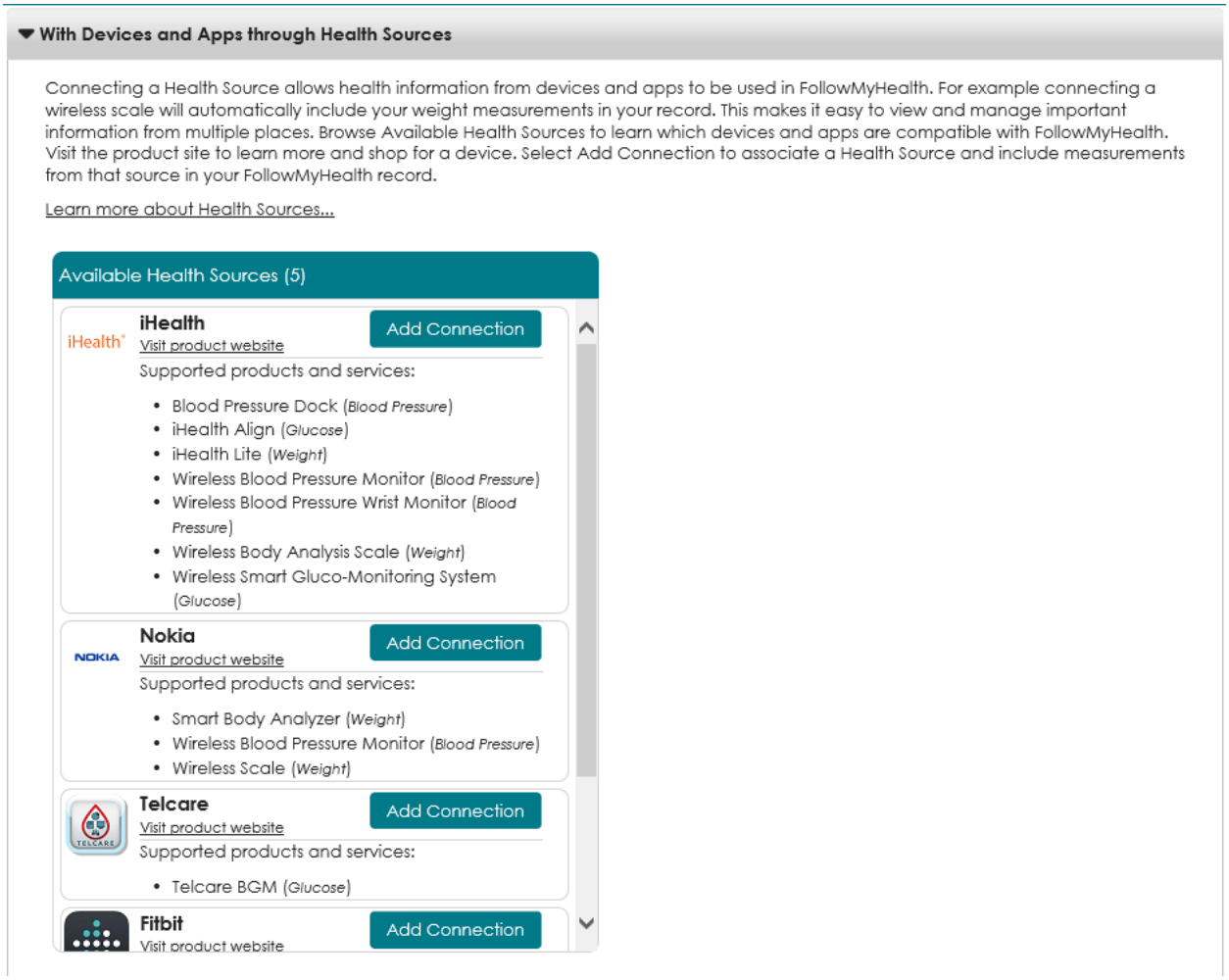
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Connect to devices and applications

You can add and remove connections for devices and applications.

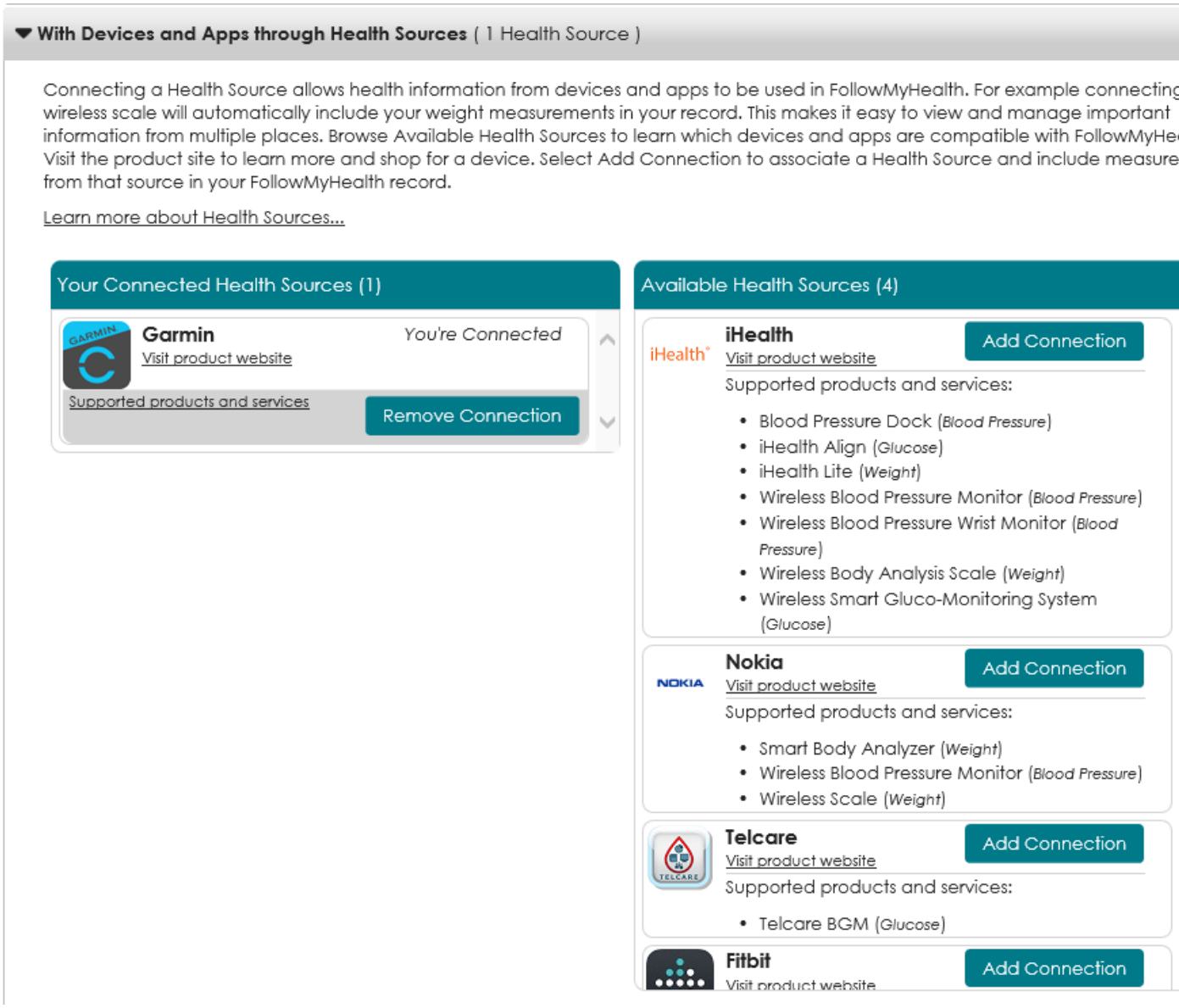
Refer to the instructions for each health source that is supported by FollowMyHealth to connect the health source.

View available devices and applications from **My Account > Connections > With Devices and Apps through Health Sources > Available Health Sources**. The number of devices and applications is displayed next to the **Available Health Sources** label.



After you add a health source, the health source is displayed in **Your Connected Health Sources** and the number of connected health sources is displayed next to the **Your Connected Health Sources** label.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



To disconnect a health source, click **Remove Connection** from the health source displayed in **Your Connected Health Sources**. You must confirm that you want to remove the connection by clicking **Yes** in the confirmation window. After you click **Yes**, the health source connection is removed and you cannot add new data to the patient portal with the health source application. However, you can still view the historical data and can restore the connection.

If a health source is no longer supported by FollowMyHealth and is removed from **Devices & Apps**, a message is displayed in **Your Connected Health Sources**. Click **OK, I got it** to remove the message.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The historical data that is collected by the health source remains available in your health record. You can continue to use the devices and applications, but the data is not sent to your patient portal account.

Connect an iHealth health source

Use the iHealth® health source to access weight, blood pressure, and blood glucose measurements from your patient portal account.

Before you begin

You must purchase an iHealth® Labs device. Click **Visit product website** from the iHealth® application in **Devices & Apps** to be directed to the iHealth® Store.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click the **With Devices and Apps through Health Sources** tab.

   The **With Devices and Apps through Health Sources** tab is displayed and you can view your connected devices and applications and available health sources.
4. From **Available Health Sources**, find the iHealth® health source and click **Add Connection**.

   iHealth Labs Login opens.

   Follow the instructions from the iHealth® web page to complete the connection.

Results of this task

The iHealth® health source is connected to FollowMyHealth.

The iHealth® health source is now listed under **Your Connected Health Sources**.

Connect a Telcare health source

The Telcare health source provides a link between FollowMyHealth and your personal Telcare blood glucose meter. You can take your blood glucose reading and the data automatically uploads to the patient portal.

Before you begin

You must purchase a Telcare blood glucose meter. Click **Visit product website** from the Telcare application in **Devices & Apps** to be directed to the Telcare Store.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

3. Click the **With Devices and Apps through Health Sources** tab.

   The **With Devices and Apps through Health Sources** tab is displayed and you can view your connected devices and applications and available health sources.

4. From **Available Health Sources**, find the Telcare health source and click **Add Connection**.

   The Telcare web page opens.

5. Sign in with the user name and password that you created when you created your Telcare account.
6. Follow the steps provided by the Telcare web page to connect your blood glucose meter.

Results of this task

The Telcare Blood Glucose Meter is connected to FollowMyHealth.

The Telcare health device is now listed under **Your Connected Health Sources**.

Connect a Nokia health source

The Nokia health source provides a link between FollowMyHealth and your personal Nokia device. You can measure your vital signs and the data automatically uploads to the patient portal.

Before you begin

You must purchase a Nokia device. Click **Visit product website** from the Nokia health source in **Devices & Apps** to be directed to the Nokia Store.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

3. Click the **With Devices and Apps through Health Sources** tab.

   The **With Devices and Apps through Health Sources** is displayed and you can view your connected devices and applications and available health sources.

4. From **Available Health Sources**, find the Nokia health source and click **Add Connection**.

   My Nokia account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** displayed and you can create an account.

5. Sign in with the user name and password that you created when you created your Nokia account.

   Authorize FollowMyHealth opens.

6. Follow the steps provided by the Nokia web page to connect your device.

Results of this task

The Nokia health source is connected to FollowMyHealth.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The Nokia health source is now listed under **Your Connected Health Sources**.

Connect a Fitbit health source

The Fitbit health source provides a link between FollowMyHealth and your personal Fitbit device. You can track your daily steps with the Fitbit tracker and weight with the Fitbit scale. The data is uploaded to your patient portal account.

Before you begin

You must purchase a Fitbit device. Click **Visit product website** from the Fitbit health source in **Devices & Apps** to be directed to the Fitbit store.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click the **With Devices and Apps through Health Sources** tab.

   The **With Devices and Apps through Health Sources** is displayed and you can view your connected devices and applications and available health sources.
4. From **Available Health Sources**, find the Fitbit health source and click **Add Connection**.

   My Fitbit account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** is displayed and you can create an account.
5. Sign in with the user name and password that you created when you created your Fitbit account.

   Authorize FollowMyHealth opens.
6. Follow the steps provided by the Fitbit web page to connect your device.

Results of this task

The Fitbit device is connected to FollowMyHealth.

The Fitbit health device is now listed under **Your Connected Health Sources**.

Connect a Garmin health source

The Garmin health source provides a link between FollowMyHealth and your personal Garmin device. Depending on your device model, you can track a variety of fitness and health data that is automatically uploaded to the patient portal.

Before you begin

You must purchase a Garmin device. Click **Visit product website** from the Garmin health source in **Devices & Apps** to be directed to the Garmin store.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Click the **With Devices and Apps through Health Sources** tab.

   The **With Devices and Apps through Health Sources** is displayed and you can view your connected devices and applications and available health sources.
4. From **Available Health Sources**, find the Garmin health source and click **Add Connection**.

   My Garmin account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** is displayed and you can create an account.
5. Sign in with the user name and password that you created when you created your Garmin account.

   Authorize FollowMyHealth opens.
6. Follow the steps provided by the Garmin web page to connect your device.

Results of this task

The Garmin device is connected to FollowMyHealth.

The Garmin health device is now listed under **Your Connected Health Sources**.

Device list

Wireless devices, such as weight scales, fitness trackers, blood pressure cuffs, and blood glucose monitors, enable you to automatically import weight, blood pressure, and glucose readings into the patient portal.

Each device has an application in **Health Sources** that integrates the device with FollowMyHealth.

Device	Features	FollowMyHealth integration
Fitbit® step trackers	Blue tooth enabled Measures daily steps	Daily steps are imported into FollowMyHealth
Fitbit® weight scale	Blue tooth enabled Measures weight Calculates BMI	Weight and BMI readings are imported into FollowMyHealth
Garmin®	Blue tooth enabled Measures fitness and health	Health and fitness data is imported into FollowMyHealth

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Device	Features	FollowMyHealth integration
iHealth® Labs Wireless Blood Pressure Wrist Monitor	Bluetooth-enabled Measures blood pressure Measures pulse	Blood pressure readings are imported into FollowMyHealth
iHealth® Labs Wireless Blood Pressure Wrist Monitor	Bluetooth-enabled Measures blood pressure Measures pulse	Blood pressure readings are imported into FollowMyHealth
iHealth® Labs Wireless Blood Pressure Monitor	Bluetooth-enabled Measures blood pressure Measures pulse	Blood pressure readings are imported into FollowMyHealth
iHealth® Labs Blood Pressure Dock	Connects to iPhone®, iPad®, and iPod® Measures blood pressure Measures pulse	Blood pressure readings are imported into FollowMyHealth
iHealth® Labs Wireless Body Analysis Scale	Wi-Fi-enabled Measures weight, body fat, body water, visceral fat, body muscle mass, and bone mass	Weight and BMI readings are imported into FollowMyHealth
iHealth® Labs Wireless Scale	Bluetooth-enabled Measures weight	Weight and BMI readings are imported into FollowMyHealth
iHealth® Labs Wireless Smart Gluco-Monitoring System	Bluetooth-enabled Measures blood glucose	Blood glucose readings imported into FollowMyHealth
iHealth® Labs iHealth Align	Attach to Android™ or Apple® devices Measures blood glucose	Blood glucose readings imported into FollowMyHealth
Nokia Fitness Tracker	Measures steps for fitness tracking	Steps are imported into FollowMyHealth

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Device	Features	FollowMyHealth integration
Nokia Smart Body Analyzer	Bluetooth and Wi-Fi-enabled Measures weight Calculates BMI Calculates body fat percentage Measures pulse Monitors ambient temperature Monitors ambient C02 levels	Weight readings are imported into FollowMyHealth
Nokia Wireless Scale	Bluetooth and Wi-Fi-enabled Measures weight Calculates BMI	Weight readings are imported into FollowMyHealth
Nokia Wireless Blood Pressure Monitor	Bluetooth-enabled Measures blood pressure Measures pulse	Blood pressure readings are imported into FollowMyHealth
Telcare Blood Glucose Meter	Uses a cellular phone connection Measures blood glucose	Blood glucose readings are imported into FollowMyHealth

Fitbit®

https://www.fitbit.com/store

Garmin®

https://apps.garmin.com/en-US/

iHealth® Labs Wireless Blood Pressure Wrist Monitor

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

iHealth® Labs Wireless Blood Pressure Wrist Monitor

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

iHealth® Labs Wireless Blood Pressure Monitor

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-monitor/

iHealth® Labs Blood Pressure Dock

http://www.ihealthlabs.com/support/blood-pressure-monitors/blood-pressure-dock/

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

iHealth® Labs Wireless Body Analysis Scale
http://www.ihealthlabs.com/wireless-scales/wireless-body-analysis-scale/

iHealth® Labs Wireless Scale
http://www.ihealthlabs.com/wireless-scales/wireless-scale/

iHealth® Labs Wireless Smart Gluco-Monitoring System
http://www.ihealthlabs.com/glucometer/wireless-smart-gluco-monitoring-system/

iHealth® Labs iHealth Align
http://www.ihealthlabs.com/glucometer/ihealth-align/

Nokia Smart Body Analyzer
http://vitrine.withings.com/us/smart-body-analyzer.html

Nokia Wireless Scale
http://vitrine.withings.com/us/ws-30.html

Nokia Wireless Blood Pressure Monitor
http://vitrine.withings.com/us/blood-pressure-monitor.html

Telcare Blood Glucose Meter
http://www.telcare.com/

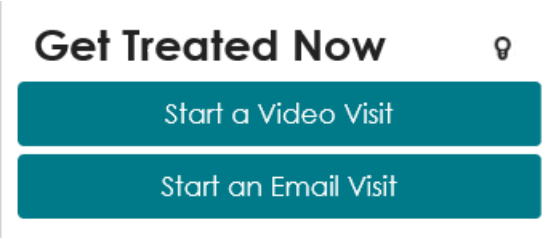
Get Treated Now

The **Get Treated Now** section is only available on the **Home** tab if your organization has the telehealth features enabled.

If your organization has these telehealth features turned on and **Get Treated Now** is displayed on your **Home** tab, you can talk to a doctor in either of the following ways.

> Click **Start a Video Visit**
> Click **Start an Email Visit**

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Refer to the sections "On-demand video visits" and "Email Visits" for more information about these offerings.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 7

My Health

The **My Health** tab contains all the information about your healthcare, including conditions, medications, allergies, immunizations, test results, vital signs, documents, and your medical chart.You can also make a list of your providers from **My Health**.

You can view all sections of **My Health** on the **Summary** tab, or, you can go to each section by clicking the section tab or selecting the section from the **My Health** tab menu.

To print the information from the tab that you are currently on, click **Print**. To print all tabs at 1 time, click **Print All** from the **Summary** tab. You can also email the information on 1 tab by clicking **Email**, or all tabs, by clicking **Email All**.

> **Note:** The health data that you email, print, or fax from the **My Health** tabs is not encrypted. A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through encrypted eMail.

Summary

The **Summary** tab on **My Health** provides a current snapshot of your active medical information.

The **Summary** tab can be printed so that you have a hard copy of your current health information to share with your provider, carry with you in case of an emergency, or keep on file at your home. You can also directly email or fax your summary.

You can also import or export your health record file or clinical documents to or from your universal health record (UHR).

Demographics

Displays your picture, name, date of birth, and address. This information is collected from the **My Info** tab. To change your picture, click **New Photo**.

My Care Team

Add your primary providers to the care team list. The list includes the name of your provider, a note about the provider or nurse specialty, and contact information.

Diagnoses

Displays all active conditions from the **Conditions** tab of **My Health**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Surgical History

Displays all surgical history conditions from the **Conditions** tab of **My Health**.

Allergies

Displays all active allergies from the **Allergies** tab of **My Health**.

Medications

Displays all active medications from the **Medications** tab of **My Health**.

Recent Vitals

Displays the most current value, if any, for height, weight, and body mass index (BMI).

Manage your care team list

The **My Care Team** list on the **Summary** tab, provides a quick contact list of your most frequently used healthcare providers.

The list is always available on the **Summary** tab and you can print the list to carry with you in case of emergency or to share with your other providers. You can also remove providers from the list and edit the provider information.

> **Note:** Your participating providers can be viewed at **My Account > Connections > With Providers and Healthcare Organizations**. **My Care Team** is intended as a quick reference to providers.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Summary** tab.

   The **Summary** tab is displayed.
4. Click **Add Provider**.

   Add Preferred Provider opens.
5. Enter the provider's name, information that distinguishes the provider from other providers, and the contact information.
6. Click **Save**.

   The provider is listed in **My Care Team**.
7. To delete a provider from **My Care Team**, click .

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

A message opens to confirm that you want to delete the provider.

8. Click **Yes**.
9. To edit the provider information, click .
   Add Preferred Provider opens.
10. Edit the information and click **Save**.

Results of this task

You learned how to add a provider to **My Care Team**, edit a provider, and delete a provider.

Import clinical summary documents

Add a clinical summary document to your health record by importing a document from your provider.

You can add any HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD) or clinical summary document, to your healthcare record. These documents are provided by most healthcare organizations and can often be exported from personal health records and patient portals.

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Summary** tab.
   The **Summary** tab is displayed.
4. Click **Import**.
   Import Clinical Document is displayed.
5. From **Choose File**, browse for the file that you want to import.
6. Click **Import**.

Results of this task

Your document is imported.

When you import a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Download clinical summary documents

You may want to save clinical summary documents on your local computer directory or external hard drive. In this case, you can download (export) clinical summary documents from your health record.

Documents are exported as an HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD). You can save this file to your hard drive or external storage device such a USB drive.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Summary** tab.

   The **Summary** tab is displayed.
4. Click **Send > Export**.

   Export Clinical Document is displayed.
5. Select **Download to this computer or an external storage device** and click **Continue**.

   An example of an external storage device is a USB drive.

   Download Clinical Document is displayed.

   You can select a document from the right pane or narrow the results in the right pane by filtering your documents under **Filter by Date**.
6. Search for the document that you want to export by filtering by date.

   > Select **Specific Date** to search for a document from a specific date. Click the blank box to open the calendar tool. Enter the date from the calendar tool. Click **Apply**.
   > Select **Date Range** to search for a document from a range of dates. Click the blank box to open the calendar tool. Enter a date range. Click **Apply**.

   The documents that match the filter results are displayed in the right pane.
7. Select **Select All** to select all documents that are listed in the right pane or select a single document to export.

   The files are packaged in a `.zip` file.
8. Click **Download** and select a file or document type.

   > To download your health record as a document, select **Download as a Document (HTML)**.
   > To download a clinical summary document, select **Download as a CCD (XML) file**.

   A message is displayed that asks if you want to open or save the document.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

9. Save the file or document to your local drive.

Results of this task

Your document is exported.

When you download a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

Email clinical summary documents

You can email your clinical summary documents to your provider or other interested party.

Documents are transmitted as an HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD). When you email your information, you can encrypt and password-protect the electronic message, but you must share the password with the recipient or they cannot open the file.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Summary** tab.

   The **Summary** tab is displayed.
4. Click **Send > Export**.

   Export Clinical Document is displayed.
5. Select **Transmit via email** and click **Continue**.

   Email Clinical Document is displayed.
6. Search for the document that you want to export by filtering by date.

   > Select **Specific Date** to search for a document from a specific date. Click the blank box to open the calendar tool. Enter the date from the calendar tool. Click **Apply**.
   > Select **Date Range** to search for a document from a range of dates. Click the blank box to open the calendar tool. Enter a date range. Click **Apply**.

   The documents that match the filter results are displayed in the right pane.
7. Select **Select All** to select all documents that are listed in the right pane or select a single document to export.

   The files are packaged in a `.zip` file.
8. Enter the email address that you want to send your information to.
9. (Optional) To password-protect your email message, select **Encrypt** and enter a password for **Password**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** If you want to encrypt your email message, you must share this password with the recipient so that he or she can access the message.

10. Click **Send**.

    Your email has been sent is displayed.

11. Click **OK**.

Results of this task

Your clinical summary document is sent through email.

When you transmit a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

Conditions in your health record

Conditions are known problems or diagnoses. You can track your active conditions, past medical history, surgical history, family health considerations, and personal health considerations in theFollowMyHealth patient portal.

The **Conditions** tab on **My Health** lists all of your conditions, including **Surgical History**, **Active**, and **Family Health Conditions**.

Each condition type is organized in a section. When you add a condition, you designate a type, such as **Surgical History**, and the condition is added to that section. The sections can be expanded and collapsed. The number of conditions in the section are displayed in parentheses next to the section title.

Conditions are sorted in reverse chronological order by resolved date.

Procedures are sorted in reverse chronological order by procedure date.

To view education information about a condition, click in the **Education** column. Specific and easy-to-read education information is available.

A green check mark in the **New** column identifies the condition as new.

Edit an active condition

Active conditions are health conditions that are ongoing problems. Your provider adds active conditions when you have a visit and you can edit the conditions.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The **My Health** tab is displayed.

3. Click the **Conditions** tab.

   The **Conditions** tab is displayed.

4. Expand **Active**.
5. Find the condition that you want to edit.
6. Click .

   View Health Condition opens.

7. Edit the condition.

   If a provider entered a resolved condition, select **Resolved** for **Status**. You must then enter a date when the issue was resolved.

   If a provider entered a condition that is not applicable, select **Denied**. Items that are resolved are displayed in the **Past Medical History** section.

8. Click **Close**.

Results of this task

You have edited an active health condition.

Add an active condition

Active conditions are health conditions that are ongoing problems. Your provider adds active conditions when you have a visit. You can also add conditions to your health record.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.

3. Click the **Conditions** tab.

   The **Conditions** tab is displayed.

4. Click Add Condition.

   Add Health Condition opens.

5. For **Type**, select **Health Condition**.
6. For **Name**, type the name of the condition

   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.

7. For **Status**, select **Active**.
8. For **Comments**, enter related comments.
9. Click **Save**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Confirm Add opens.

10. Click **Yes**.

    The condition is listed under **Active**.

Results of this task

You have added an active condition to your health record.

Add a surgical history condition

Surgical history conditions are health conditions that are related to surgical procedures.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Conditions** tab.

   The **Conditions** tab is displayed.
4. Click **Add Condition**.

   Add Health Condition opens.
5. From **Type**, select **Surgical History**.
6. Enter the name of the condition in **Name**.

   When you the name, a list of conditions are displayed. You can select 1 of these conditions.
7. Select a status from **Status**.

   Resolved

   Specifies that this is a past surgery.

   Denied

   Specifies that you did not have this surgery.
8. For **Procedure Date**, enter the date of the surgery.
9. For **Provider**, enter the name of the provider that performed the surgery.
10. For **Comments**, enter related comments.
11. Click **Save**.

    Confirm Add opens.
12. Click **Yes**.

    You have added a surgical history condition to your health record.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Add a family health condition

Family health conditions are conditions and issues that your family members have that you are at risk for. As a general rule, healthcare providers are only interested in family health conditions for blood relatives.

If a patient is adding a family health condition to his or her family health history, and he or she has authorized individual access to other patients that are family members, the patient can update the family members' health history at the same time.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Conditions** tab.

   The **Conditions** tab is displayed.
4. Click **Add Condition**.

   Add Health Condition opens.
5. From **Type**, select **Family Health Condition**.
6. Enter the name of the condition in **Name**.

   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.
7. Select a status from **Status**.

   Active

   Specifies a condition that is currently a problem for a family member.

   Resolved

   Specifies a condition that a family member has had but no longer has.

   Denied

   Specifies a condition that you do not want included in your family history.
8. Enter the relationship of the family member in **Relationship**.
9. Enter related comments in **Comments**.
10. Click **Save**.

    If you are an authorized individual, **Family Health Condition** opens. The patients that you are an authorized individual for are displayed in the window. Select family members that the health condition also applies to.
11. For **Comments**, enter related comments.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

12. Click **Save**.

    Confirm Add opens

    .

13. Click **Yes**.

    You have added a family health condition to your health record.

    The condition is listed under **Family Health Conditions** for you and the family members that you are an authorized individual for.

Add a personal health condition

Personal health conditions include smoking status, exercise habits, drug use, or living habits.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Conditions** tab.

   The **Conditions** tab is displayed.
4. Click **Add Condition**.

   Add Health Condition opens.
5. For **Type**, select **Personal Health Condition**.
6. For **Name**, type the name of the condition

   When you enter the name, a list of conditions is displayed. You can select 1 of these conditions, or enter your own.
7. For **Status**, select **Active**.

   Active

   Specifies an issue that is currently active.

   Resolved

   Specifies an issue that used to be active, but is no longer active.

   Denied

   Specifies an issue that must not be included in your personal health condition history.
8. For **Comments**, enter related comments.
9. Click **Save**.

   Confirm Add opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

10. Click **Yes**.

    The condition is listed in **Conditions**.

Results of this task

You have added a personal health condition to your health record.

Medications

The patient portal lists all active, completed, discontinued, declined, and temporary deferral medications.

From the **Medications** tab on **My Health** you can add, delete, and edit medications, request a renewal, and add a preferred pharmacy.

Each medication is displayed in a section. Medications are categorized by status, including Active, Unknown, TemporaryDeferral, Declined, and Complete. You can expand and collapse the sections. The number of medications in each section is displayed in parentheses next to the section title.

Medications are sorted alphabetically by medication name and then by date (newest to oldest).

To view education information about a medication, click in the **Education** column. Specific and easy-to-read education information is displayed.

A green check mark in the **New** column identifies the medication as new.

Add or edit a medication

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Medications** tab.

   The **Medications** tab is displayed.
4. Click **Add Medication**.

   Add Medication opens.
5. For **Name**, enter the name of the medication.

   When you enter the name, a list of medications is displayed. You can select 1 of these medications, or enter your own.
6. For **Directions**, enter the directions provided by the provider, or how you take your medication.
7. From **Status**, select the status that applies to the medication.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Active

Specifies a medication that you are currently taking.

Complete

Specifies a medication that you have finished, such as an antibiotic.

Discontinued

Specifies a medication that your provider has asked you to stop taking or is discontinued.

Unknown

Specifies a medication that does not fit in the other categories provided.

Declined

Specifies a medication that the provider added that you declined to take.

On Hold

Specifies an added medication that is on hold until your provider confirms the medication. This medication is added under the **TemporaryDeferral** section.

EnteredInError

Specifies a medication that was entered in to your health record by error.

8. For **Provider**, enter the provider who prescribed the medication.
9. For **Comments**, enter related comments.
10. Click **Save**.

    Confirm Add opens.
11. Click **Yes**.

    The medication is listed in **Medications**.

Results of this task

You have added or edited a medication in your health record.

Add a preferred pharmacy

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Medications** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The **Medications** tab is displayed.

The preferred pharmacy is listed under the **Medications** title on the tab.

4. Click **Edit**.

   Pharmacy Search opens.

5. For **Search**, enter the ZIP Code of or near the pharmacy.

   By default, your ZIP Code is displayed when **Pharmacy Search** opens. You can change the value.

6. For **Distance in Miles**, select the proximity in miles that you want the application to search.

   The application searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.

7. Select a pharmacy and click **Connect**.

   A message is displayed to confirm that the new pharmacy is saved.

8. Click **OK**.

   Send to Organization opens.

9. Select the organizations that you want to send the change to and click **Send**.

   A message is displayed to confirm that the pharmacy change is submitted to your connected organizations.

Results of this task

The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy**on the **Medications** tab. The preferred pharmacy is also changed in **Health Summary** after you sign out and sign back in to the patient portal.

Request a medication renewal

If you use the online request, there is no need to call the office to request the renewal.

You can request a prescription refill from a provider if the provider meets the following criteria:

> The provider has enabled **Allow Prescription Renewals**.
> The provider is the most recent ordering provider of the your medication.

The following features apply to providers that receive prescription refills:

> All ordering providers of the medication will receive the refill request. If you have been prescribed the medication multiple times by more than 1 provider, all of these providers are available to receive the request if the provider has **Allow Prescription Renewals** enabled.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> All authorizing providers of the medication will receive the refill request. If the medication is refilled, but the authorizing provider changed, the authorizing providers are available to receive the request if he or she has **Allow Prescription Renewals** enabled.
> If the ordering or authorizing provider is not in your provider collection, he or she is not included in the refill request unless the provider has enabled the **Rx Renewal Request**.

If you need a prescription refill, notify the pharmacy. Online renewal requests must only be used when you are out of refills.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Medications** tab.

   The **Medications** tab is displayed.
4. Find the medication that you want to renew and click .

   Renew a Prescription opens.
5. For **Provider**, select the provider who prescribed the medication to you.

   You can only request a renewal from a provider who has prescribed this medicine for you in the past. The last provider who wrote the prescription for you is displayed as the default provider in **Provider**. **Prescription** and **Medication Info** are also filled by default and cannot be changed.
6. (Optional) To change the pharmacy where the renewal is filled, click **Change** in **Pharmacy Location**.

   Your preferred pharmacy is listed in **Pharmacy Location** as the default pharmacy.

   > **Attention:** If you change the pharmacy during the renew prescription action, the alternate pharmacy is only applied to this specific renewal request. Use this option if you use a separate pharmacy for some medications, such as a mail order pharmacy used only for ongoing prescriptions.
7. For **Comments**, enter any comments that you want your provider to know about the request.
8. Click **Send**.

   Renewal Confirmation opens.
9. Click **OK**.

Results of this task

You have requested a medication renewal. Your provider receives an electronic request to refill the prescription.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Allergies

The **Allergies** tab in the patient portal lists all active, resolved, denied, and inactive allergies.

From the **Allergies** tab on **My Health**, you can add, delete, and edit allergies.

Allergies are categorized by status, including Active, Inactive, Unknown, Denied, and Resolved. You can expand and collapse the sections. The number of allergies in each section is displayed in parentheses next to the section title.

Allergies are sorted in reverse chronological by onset date.

Add or edit an allergy

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Allergies** tab.

   The **Allergies** tab is displayed.
4. Click **Add Allergy**.

   Add Allergy opens.
5. For **Allergy Type**, select an allergy type.

   Medication

   Specifies that you have an allergy to a medication.

   Environmental

   Specifies that you have an allergy to items in your environment, such as pets, trees, or dust.

   Food

   Specifies that you have an allergy to certain food types.

   Unknown

   Specifies that you do not know what type of allergy you have.
6. For **Name**, enter the name of the allergy.

   When you enter the name, a list of allergies is displayed. You can select 1 of these allergies, or enter your own.
7. For **Status**, select the status that applies to the allergy.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Active

Specifies an active allergy or an allergy you currently have.

Inactive

Specifies an allergy that you might still have, but it is not currently an issue for you.

Resolved

Specifies an allergy that you no longer have.

Denied

Specifies that you know you do not have a known allergy. It is important that non-allergy specifics are added to your health record so that providers know that they can give you a certain medication or use latex.

8. (Optional) For **Onset**, enter the date that you first became aware of the allergy.
9. For **Allergic Reaction**, enter what kind of reaction you experience when exposed to the item, such as rash or nausea, and click .

   The reaction is displayed in **Allergic Reactions**.
10. For **Comments**, enter related comments.
11. Click **Save**.

    Confirm Add opens.
12. Click **Yes**.

    Notify Organization of Added Item opens.
13. Click **Yes** or **No**.

    If you click **Yes**, a message is displayed to confirm that a notification is sent.
14. Click **OK**.

Results of this task

You have added or edited an allergy in your health record.

Immunizations

You can view your immunization history, add, edit, and delete immunizations, and access vaccine information sheets and immunization schedules that are published by the Centers for Disease Control and Prevention (CDC) from the **Immunizations** tab on **My Health**.

Immunizations are categorized by status, including Received, Declined, Unknown, and OnHold.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

The **Show** menu is a drop-down list that you can use to filter the immunizations by status. You can select multiple status types so that all Received, Declined, Unknown, and On Hold immunizations are displayed. The **Show** menu is not available if you do not have immunizations recorded in your health record. Only statuses for which you have at least 1 immunization are available to select. For example, if you do not have any immunizations of Unknown status, then Unknown status setting is not available to select.

Immunizations are grouped by their series. Only the immunizations' series for which you have received at least 1 immunization are displayed. Immunization records within a series are displayed in a descending order by administered date. For example, the latest immunization is displayed first. If you have more than 3 immunization records applicable to Influenza (Flu) series or are a patient between ages 19 and 64, and have more than 3 immunization records applicable to Pneumococcal series, then the immunizations in the series are collapsed and the last 3 immunizations are displayed.

Immunizations for all other series are always expanded with no option to collapse. You can click **View More** to display more immunizations or **View Less** to display less immunizations.

Received immunizations are displayed as the default view if you have at least 1 immunization of Received status in your history. If you do not have received immunizations, but have immunizations of other statuses, all immunization status types are displayed as the default view.

Add an immunization

You can add an immunization to your personal health record.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Immunizations** tab.

   The **Immunizations** tab is displayed.
4. Click **Add Immunization**.

   Add Immunization opens.
5. For **Immunization**, enter the name of the immunization.

   Search for an immunization by full name, brand name, or abbreviation. The search results will include exact and similar matches making it easy for you to find the immunization even if you do not know the correct spelling. The application uses advanced algorithms and machine learning to return immunizations. Search results are listed in order by relevance. The most relevant matches are displayed at the top of the list.
6. For **Date**, enter the date that you received the immunization.

   Today's calendar date is highlighted in the calendar tool so that selecting a date is easy.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

7. (Optional) For **Series**, enter the series number of the immunization.
   Series is only required if this immunization is an immunization in a series of 2 or 3 shots.
8. For **Status**, select the status that applies to the medication.

   Received
   Specifies an immunization that you have received.

   OnHold
   Specifies an immunization that you must receive but cannot receive at this time.

   Declined
   Specifies an immunization that you were offered that you declined.
9. For **Provider**, enter the name of the provider who administered the immunization.
10. For **Comments**, enter related comments.
    This box is limited to 4000 characters.
11. Click **Save**.
    Confirm Add opens.
12. Click **Yes**.
    Notify Organization of Added Item opens.
13. Click **Yes** or **No**.
    If you click **Yes**, a message is displayed to confirm that a notification is sent.
14. Click **OK**.

Results of this task
You have added an immunization in your health record.

View immunization details

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Immunizations** tab.
   The **Immunizations** tab is displayed.
4. Click an immunization that you want to view.
   The detail window opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

If the immunization is patient-entered, the **Edit Immunization** window opens and you can edit the immunization details. If the immunization is entered by your provider, the **View Immunization** window opens and is read-only.

5. Do either of the following steps:
   - > Edit the immunization details and click **Save**.
   - > View the immunization details and exit the window and click **Close**.

Results of this task

You have viewed details about your immunizations.

View CDC immunization schedules

You can view the most current Centers for Disease Control and Prevention (CDC) immunization schedules from the patient portal to ensure that you are compliant with and to plan for required pending immunizations.

You can view the following immunization schedule types.

- > Easy-to-Read Schedule for Children, Birth through 6 Years
- > Easy-to-Read Schedule for Preteens and Teens, 7-18 Years
- > Easy-to-Read Schedule for Adults, by Age

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Immunizations** tab.

   The **Immunizations** tab is displayed.
4. To view a default immunization schedule that is based on your date of birth, click **View Schedule**.

   The immunization based on your age is displayed. The application uses the date of birth that is listed in the **Demographics** section of your health record.
5. To select a specific age group immunization schedule, click the drop-down menu arrow located to the right of **View Schedule**.

   The immunization schedule types are displayed.
6. Select an immunization schedule type from the menu.

   The immunization schedule type is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

What to do next

Download or print a PDF copy of the immunization schedule.

View vaccine information sheets

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Immunizations** tab.

   The **Immunizations** tab is displayed.
4. Point the mouse pointer to the immunization that you want to view.

   The InfoButton™ education icon ( ) is displayed.
5. Click .

   Vaccination Information opens.
6. Click the link listed under **Vaccine Information Sheets**.

   The vaccine information sheet is displayed in PDF.

What to do next

Save or print the vaccination sheet.

Share your immunization record

Use the **Send** menu on the **Immunizations** tab to email, print, or fax your immunization record.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Immunizations** tab.

   The **Immunizations** tab is displayed.
4. Click the **Send** drop-down list.

   The **Send** menu is displayed.
5. Do either of the following steps:

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Select **Email** to send your immunization record by email message. Enter the email address to send your record to and click **Send**. A message is displayed, indicating that your email message is sent. Click **OK**.
- Select **Print** to print your immunization on your local printer. **Print** opens. Click **Print**.
- Select **Fax** to fax your immunization record. **Fax Immunizations** opens. Enter the recipient in the **To** box and the fax number in the **Fax Number** box and click **Send**. A message is displayed, indicating that your fax is sent. Click **OK**.

> **Note:** The health data that you email, print, or fax from the **My Health** tabs is not encrypted. A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through encrypted eMail.

Results of this task

You have emailed, printed, or faxed your immunization record.

Vital signs

The patient portal lists vital signs if your provider who took the vital signs has enabled the results to be viewed online. You can also enter your own vital signs that you are viewable.

From the **Vitals** tab on **My Health** you can add, delete, and edit vital signs, as well as generate graphs to display historical vital sign results.

When you add or edit vital signs in your health record, the unit of measure is automatically defaults to your specified display preference setting.

> **Note:** Body Mass Index (BMI) is always displayed in kilograms per meter squared, regardless of the display preference setting.

You can edit only the vital signs that are `Patient Entered`. However, you can delete any vital sign from your health record.

Each vital sign that is added is listed in its own section. You can expand and collapse the sections. The number of vital signs in each section is displayed in parentheses next to the section title. A section that has more than 3 data points or results can be displayed in a graph.

Vital signs are sorted in reverse chronological by result date.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Add a vital sign

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Vitals** tab.
   The **Vitals** tab is displayed.
4. Click **Add Vital**.
   Add Vital opens.
5. From **Type**, enter the type of the vital sign.
   When you enter the type, a list of vital sign types is displayed for you to select.
6. For **Date Taken**, enter the date that the vital sign is taken.
7. For **Value**, enter the vital sign reading.
8. For **Comments**, enter related comments.
9. Click **Save**.
   Confirm Add opens.
10. Click **Yes**.
    Notify Organization of Added Item opens.
11. Click **Yes** or **No**.
    If you click **Yes**, a message is displayed to confirm that a notification is sent.
12. Click **OK**.

Results of this task

You have added a vital sign to your health record.

Results

The patient portal lists lab results, radiology results, or any other results if your provider who ordered the tests has enabled the results to be viewed online.

From the **Results** tab on **My Health** you can add, delete, and edit results, as well as generate graphs to display historical results.

Each result that is added is listed in its own section. You can expand and collapse the sections. The number of results in each section is displayed in parentheses next to the section title. A section that has 3 or more results or data points, can be displayed in a graph.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results are sorted in reverse chronological order by result date.

To view education information about a result, click in the **Education** column. Specific and easy-to-read education information is displayed.

A green check mark in the **New** column identifies the result as new.

Non-numeric results, such as radiology and microbiology, are displayed with an indicator identifies the result as Normal or Abnormal. If the result value is unknown, no indicator is displayed.

Add a result

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Results** tab.

   The **Results** tab is displayed.
4. Click **Add Result**.

   Add Result opens.
5. For **Name**, enter the name of the result.

   When you enter the name, a list of test results is displayed. You can select 1 of these results or enter your own.
6. For **Result Date**, enter the date that you learned the results.
7. For **Value**, enter the actual result.
8. For **Provider**, enter the provider who ordered the test.
9. For **Units**, enter the units from the test result.

   For example, enter `mmHG` for blood pressure.
10. For **Comments**, enter related comments.
11. Click **Save**.

    Confirm Add opens.
12. Click **Yes**.

    Notify Organization of Added Item opens.
13. Click **Yes** or **No**.

    If you click **Yes**, a message is displayed to confirm that a notification is sent.
14. Click **OK**.

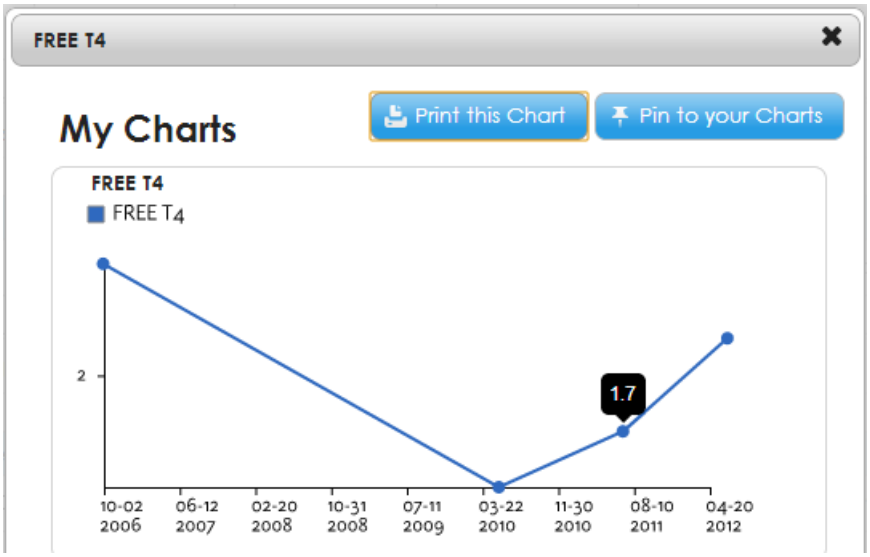
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task
You have added a result to your health record.

Graph results

You can graph results that contains 3 or more results or data points.

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Results** tab.
   The **Results** tab is displayed.
4. Find the results that you want to graph.
5. Click .
   My Charts opens.



   Point to the data points to display the result numbers for that data point.
6. Click **Print this Chart** to print the chart, or click **Pin to your Charts** to save the graph in the My Charts application in **App Center** on the **Home** tab.

Results of this task
You have graphed results in your health record.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

View results

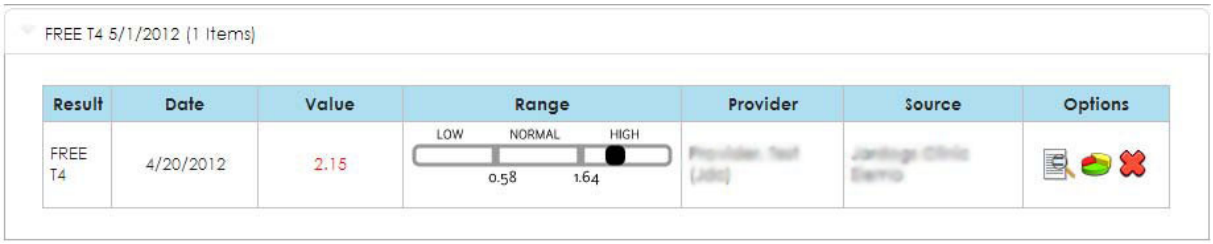
There are 2 ways to view your results, depending on the type of results.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Results** tab.

   The **Results** tab is displayed.

   Results that are numerical are contained in the **Range** column, with a visual representation of where the values lie within a range (low, normal, and high). Range information is provided only if the provider sent this information with your results.



   The **Range** column is empty for text-based results that are non-numeric, such as for pathology and radiology.

   Most numeric results from your provider have an associated reference range of normal values. You can view the range by pointing to the graphic in the **Range** column or by printing the result.

> **Important:** When researching reference ranges, be aware that high and low values can be slightly different between lab facilities. The reference ranges displayed to you in your UHR come directly from your provider's EHR application. The results range that is displayed to you is an accurate representation of what is considered low and high using the standards employed by your healthcare organization.

4. To view text-based results, click .

   The result detail window opens.

Results of this task

You have viewed the details of your results.

What to do next

Print your results.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** You can only print from details if the result is sent to the patient portal from the organization. You cannot print patient-entered results from the details window. The health data that you print is not encrypted. A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through encrypted eMail.

Documents

FollowMyHealth lists documents such as release forms you have signed, office visit documents, notes, and other documents related to your health record.

> **Note:** Scanned documents are displayed in black and white only.

From the **Documents** tab in **My Health**, you can add your own documents and view documents added by your provider.

When new documents are posted to your account, the number of new documents is displayed on the **Documents** tab in **My Health**. When you select the **Documents** tab, the new items are indicated with a check mark.

When you complete and send back an electronic form that you received from your provider, the form is added to the **Documents** tab. If you are connected to a virtual organization, you receive a release of information form for any child organization that you are connected to.

> **Important:** Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window opens with the message `You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send?`.

> **Note:** The health data that you print is not encrypted. A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through encrypted eMail.

Documents are sorted in reverse chronological order by recorded date.

Add a document

You can upload `.jpeg`, `.png`, `.txt`, and `.pdf` document file types.

If you try to upload a document type that is not supported, a warning message is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> **Note:** Printing, emailing, and faxing patient-uploaded `.txt` files is currently not supported.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Documents** tab.

   The **Documents** tab is displayed.
4. Click **Add Document**.

   Add Scanned Document opens.
5. For **Document Name**, enter the name of the document.
6. For **Date**, enter the date that the document was created.
7. For **Provider**, enter the provider that the document is from.
8. Click **Choose File** to browse your computer for the document.

   a. Select the file and click **Open**.

   The document is listed under **Files to Upload**.
9. Click **Save**.

   Confirm Add opens.
10. Click **Yes**.

    Notify Organization of Added Item opens.

    > **Note:** If this window does not pop-up, your connected organization does not use this feature.
11. Click **Yes** or **No**.

    If you click **Yes**, a message is displayed to confirm that a notification is sent.
12. Click **OK**.

    The document is listed in the **Documents** tab.
13. Click to view your document.

    The document details open.

    The document details include who wrote the document and the detailed notes included in the document.

    You can print or fax the document details from the details window.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

You have added a document to your health record and viewed the document.

Chart

Search the patient portal from the **Chart** tab to find a particular item by date or provider.

All information from **My Health** can be viewed in the **Chart** tab. View all clinical items from your health record sorted by date, such as the date when the item was first filed to your universal health record or by provider, such as the provider who is associated to each item in the EHR application.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Chart** tab.

   The **Chart** tab is displayed.
4. From **Sort By**, select **Provider** or **Date**.

   The chart items are listed on the left.
5. Click a chart item to open in the right pane.
6. Click **Send** to email, print, or fax the information on the page.

> **Note:** The health data that you print is not encrypted. A message is displayed to remind you that the transmission is unencrypted and that if you want to export, use the **Export** option from **My Health > Summary** to send through an encrypted Email message.

Goals

Your care provider can set health goals for you to achieve from home, for example "Lose 10 pounds in 3 months" or "Maintain a blood pressure under 140/90 for the next 30 days". These goals are displayed on the **Goals** tab in the patient portal to help you reach your goal. The number of unaccepted goals is displayed on the **Goals** tab until you accept or decline the new goals.

> **Note:** The **Goals** tab is not displayed unless your provider has enabled the goals feature.

Wireless blood pressure monitors, blood glucose monitors, and wireless scales can be used to automatically send data related to these goals to Allscripts FollowMyHealth® Patient Access. These

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

devices make it easy for you to follow your care plan. You can also manually enter these readings if you do not have a wireless device.

Each goal has rules specific to your condition. These rules are set when your provider creates the goal for you. Data related to the goal is analyzed against these rules.

Goals are organized by status.

New

If you have a new goal, a message is displayed on the **Goals** tab. You must accept or decline the goal to proceed with the goal. Notifications can be sent to the ordering provider if you do not respond to the new goal after a certain time period, based on rules set by your provider when the goal was created.

Active

The goal is listed under **Active Goals** when you accept the goal and you are actively collecting readings. Notifications can be sent to the ordering provider if your readings violate rules specific to the goal or if readings are not recorded based on the rules set by your provider. Results are also filed if a notification is triggered.

Completed

Completed goals are listed under **Completed Goals**. The goal is completed automatically when the goal is reached or the end date has passed. Final results are sent to the electronic health record (EHR) application and the provider can view the results. Notifications are no longer triggered and readings are no longer captured for completed goals.

Declined

Goals that you refuse to follow are listed in **Declined Goals**. You have the option to decline a goal when it is new or active. Your provider receives a notification if the goal is declined. Notifications are no longer triggered and readings are no longer captured for declined goals.

Cancelled

If a goal is cancelled by your provider, the goal is moved to **Cancelled Goals**. Notifications are no longer triggered and readings are no longer captured for cancelled goals.

Goal types

Weight management goal

The weight management goal is used to set a goal for weight gain or loss for a patient with obesity, bulimia, or anorexia.

The following list includes best practices when managing your weight management goals.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Readings are entered manually or with a compatible wireless scale. The compatible device automatically send the readings to the patient portal.
- Only weights from your compatible devices or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading, body mass index (BMI), and patient-entered comments.
- The progress is displayed as follows:
  - The first reading on the goal is used to calculate the target weight based on the weight set in the goal. The goal start and end dates are displayed in the header.
  - **Last Reading** specifies the last weight reading and the current BMI.
  - **Target Weight** specifies the target weight.
    - The target weight is the green horizontal line.
    - The initial weight is the red horizontal line.
    - The blue line is the weighted average of all the readings and displays how the patient is trending.
  - The progress indicator shows your progress towards reaching your goal. It indicates how much your weight has changed and the percentage of the goal completed.
- The compatible devices are set up in **Health Sources**.
- You can connect to your wireless scale from a weight management goal in the **Goals** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

Figure 2: Weight management data in table format

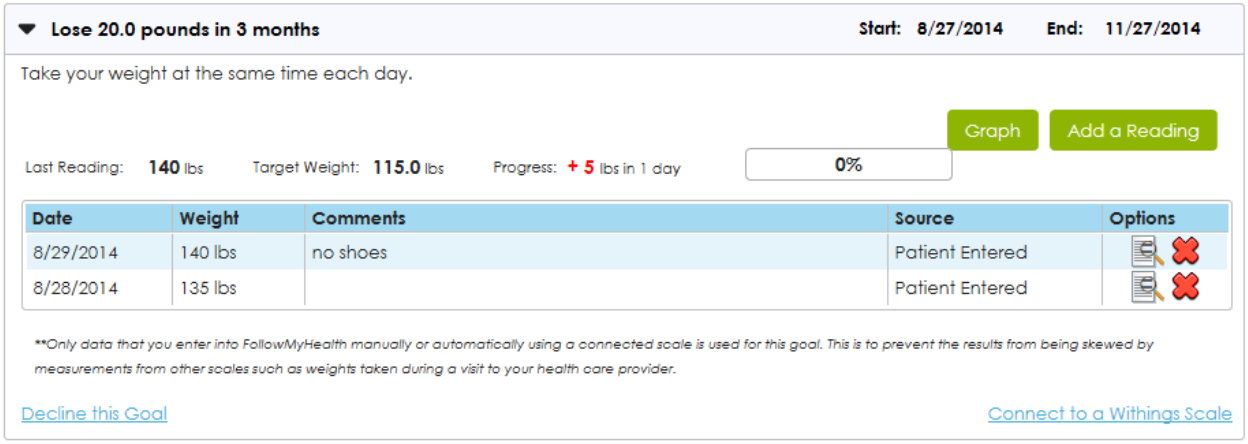
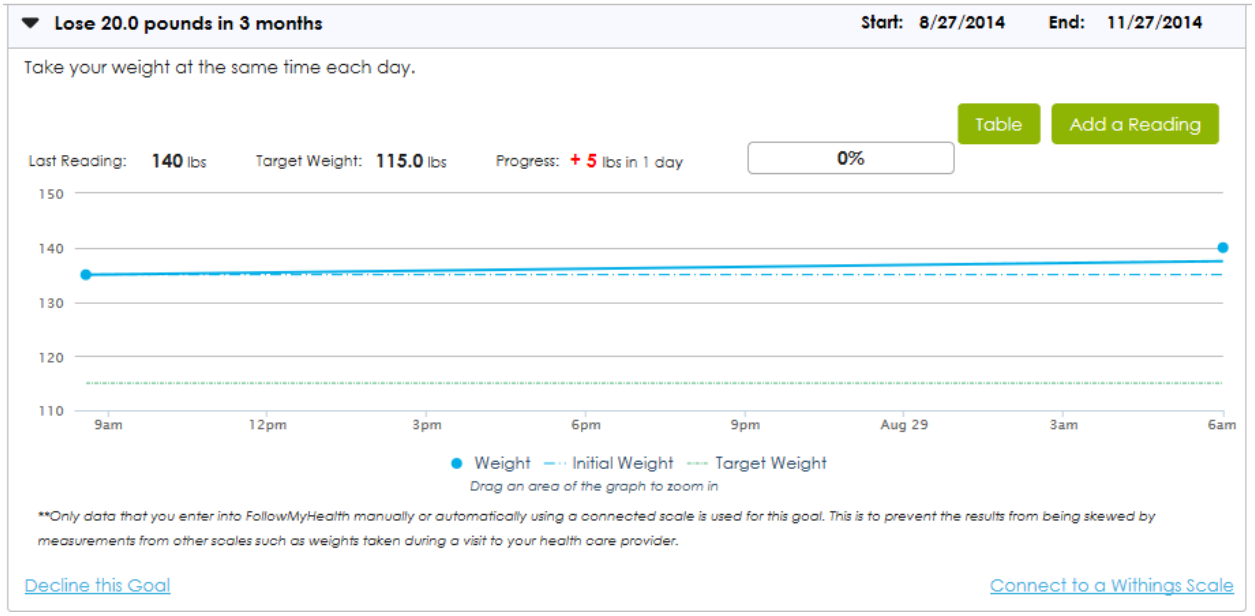


Figure 3: Weight management data in graph format



Monitor weight goal

The monitor weight goal is used to monitor weight changes in patients with congestive heart failure.

The following list includes best practices when managing your monitor weight goals.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the patient portal.
- Only weights from your compatible device or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading, body mass index (BMI), patient-entered comments, and any broken rules.
- The compatible devices are set up through **Health Sources**.
- You can connect to your compatible device from a monitor weight goal on the **Goals** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

Figure 4: Monitor weight data in graph format

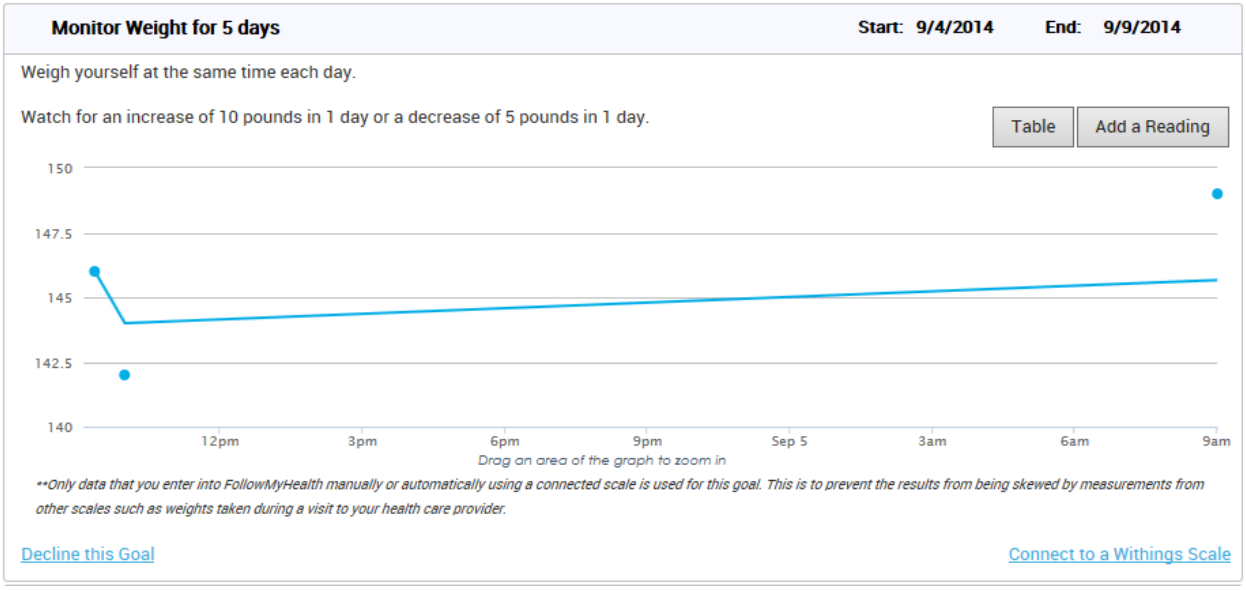
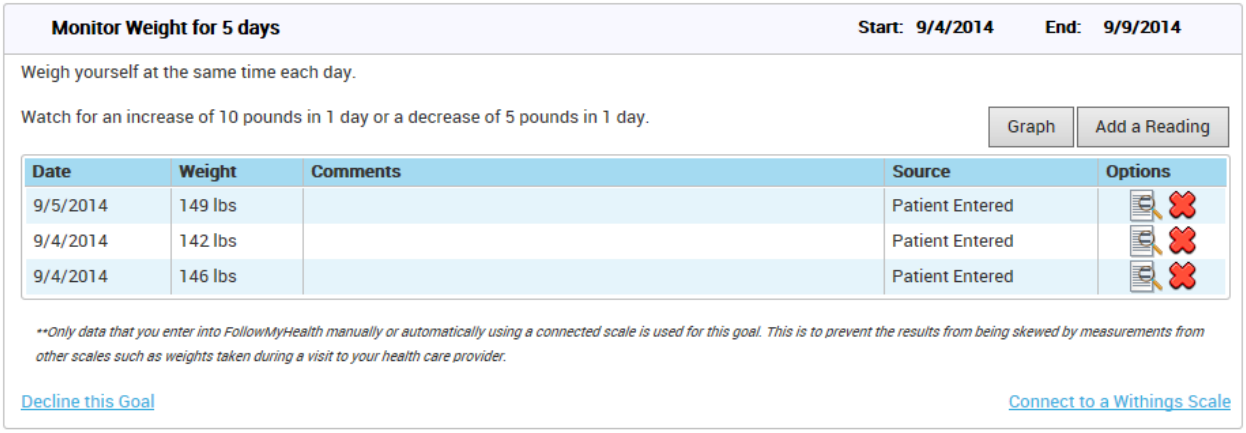


Figure 5: Monitor weight data in table format



Monitor blood glucose goal

The monitor blood glucose goal is used to monitor blood glucose levels for patients with diabetes.

The following list includes best practices when managing your monitor blood glucose goals.

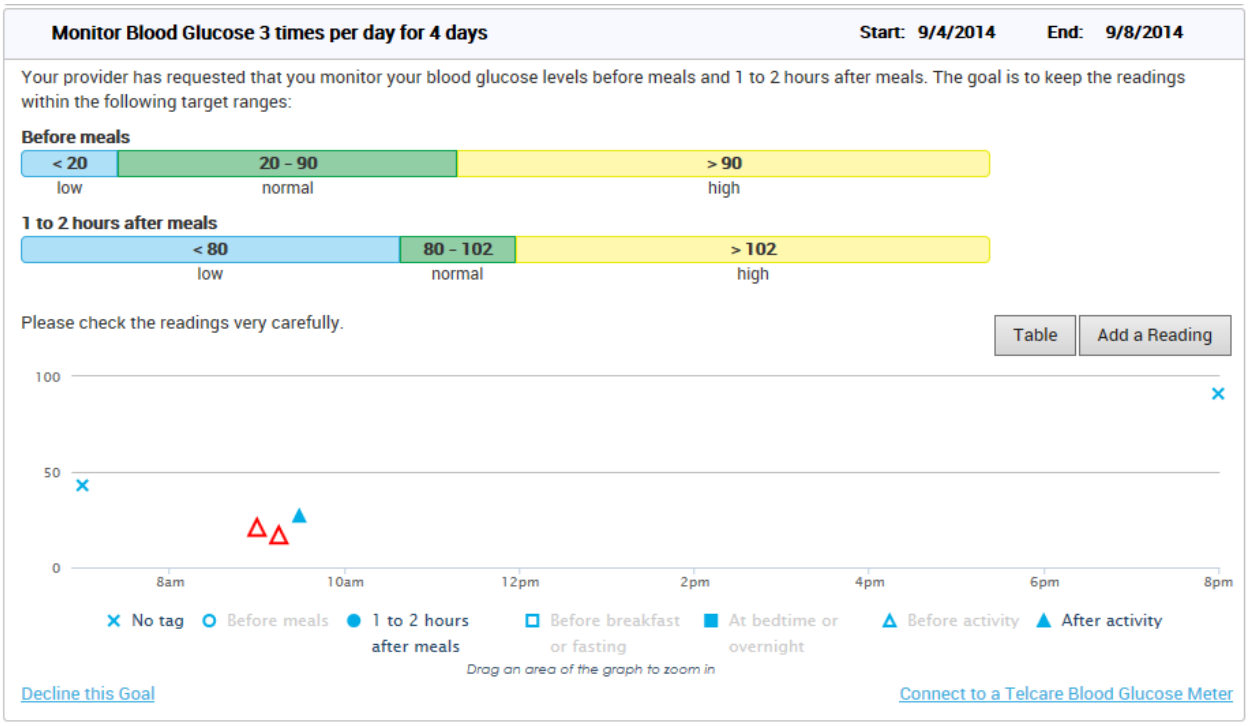
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Readings are entered manually from the goal or electronically with a compatible device that automatically sends the reading to patient portal.
- The graph data point tooltip includes the reading, date, time, tag, patient-entered comments, and any broken rules.
- The compatible devices are set up through **Health Sources**.
- You can connect to your compatible devices from a goal in the**Goals** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

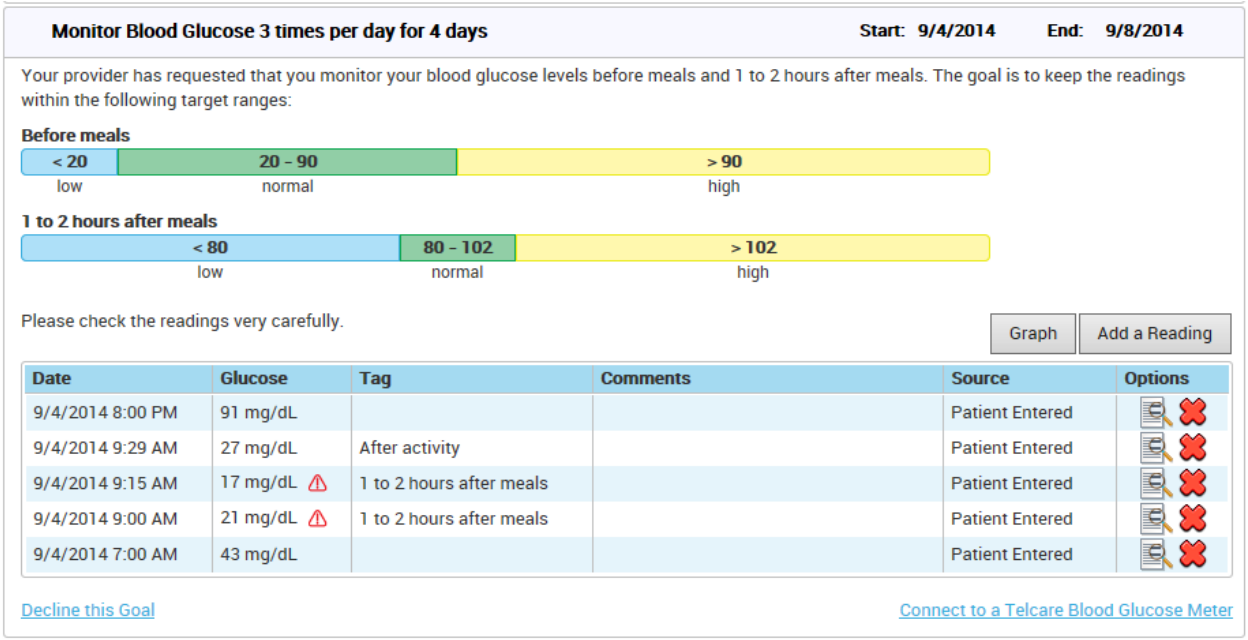
> If a blood glucose reading is added to the **Results** tab in **My Health** and the reading date is within the goal period, the reading is also added to the **Goals** tab.

Figure 6: Monitor blood glucose data in graph format



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Figure 7: Monitor blood glucose data in table format



Monitor blood pressure goal

The monitor blood pressure goal is used to monitor blood pressure levels for patients with hypertension.

The following list includes best practices when managing your monitor blood pressure goals.

- Systolic and diastolic values are connected by a line in the graph view to indicate that the values are from the same reading. The top horizontal line is the systolic goal and the bottom horizontal line is the diastolic goal.
- Readings are entered manually or with a compatible device. The device automatically sends the reading to the patient portal.
- The graph data point tooltip includes the value, date, time, patient-entered comments, and any broken rules.
- The compatible devices are set up through **Health Sources**.
- You can connect to your compatible devices from a blood pressure goal in the **Goals** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> If you add a blood pressure reading to the **Vitals** tab in **My Health**, the reading is automatically added to the **Goals** tab provided the date of the measurement is within the goal period.

Figure 8: Monitor blood pressure data in graph format

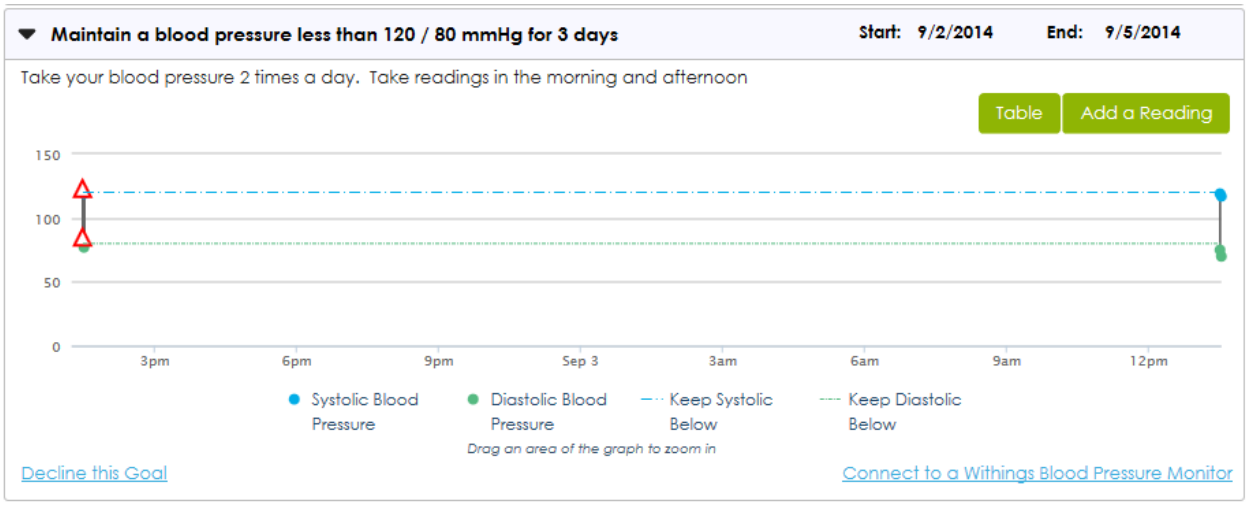
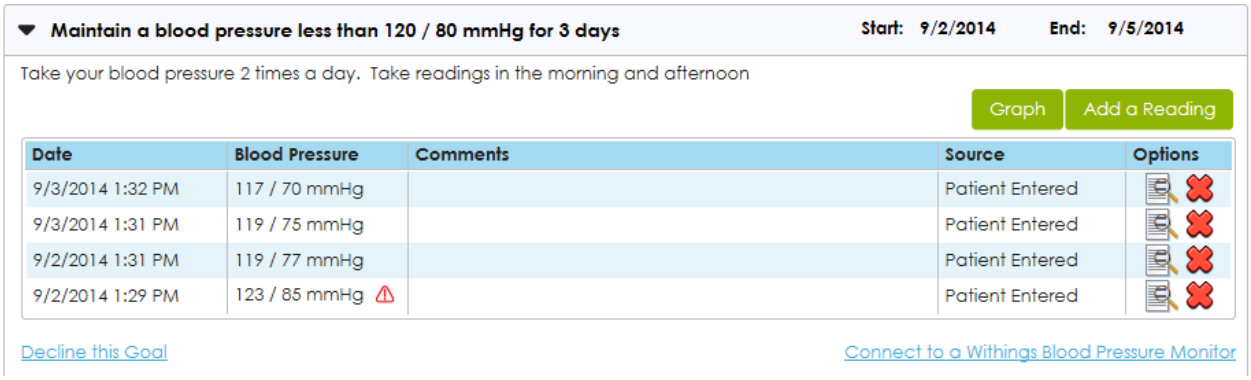


Figure 9: Monitor blood pressure data in table format



Monitor step goal

The monitor step goal is used to track the number of steps you take in a day.

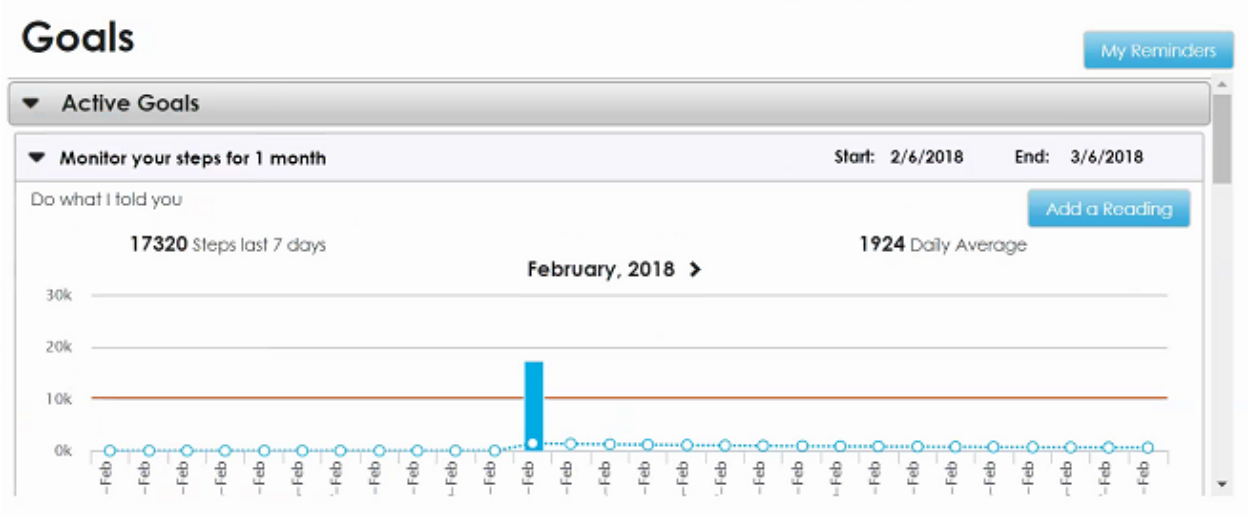
The following list includes best practices when managing your monitor step goal.

> Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the patient portal.
> Only steps from your compatible device or manually entered by you are evaluated for this goal.
> The graph data point tooltip includes the reading, patient-entered comments, and any broken rules.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

> The compatible devices are set up through **Health Sources**.
> You can connect to your compatible device from a monitor step goal on the **Goals** tab.

Figure 10: Monitor steps data in graph format



Manage your goals

View goals and readings

You must accept a new goal to add the goal to the **Goals** tab.

Before you begin

You must have at least 1 goal for the **Goals** tab to display. The number of unaccepted goals is displayed on the **Goals** tab until you accept or decline the new goals.

> After you sign in to the patient portal, click **My Health > Goals**.

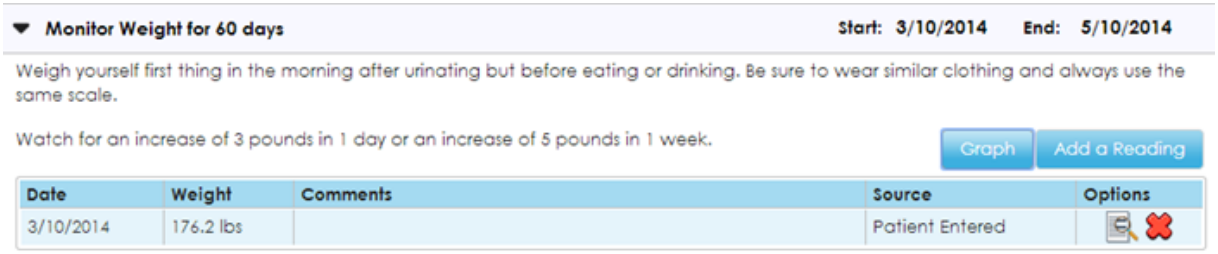
  Alternatively, you can click the goal notification in **Action Center** to access the **Goals** tab.

  The **Goals** tab is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

There are 5 different states for a goal, new, active, completed, declined, or cancelled. New goals must be accepted. Click **Click here** to accept the goal and begin collecting measurements. Click on a goal section header to see the goals in that state.

Figure 11: Goal readings



> To change the goal display, click **Graph** or **Table**.

  You can switch between **Graph** and **Table** views.

> To edit a reading from the table view, click .

> To remove a reading on the table view, click .

  The reading is removed from your universal health record (UHR) and no longer is displayed on the goal.

> To restore a reading, go to **My Account > Preferences > Restore Deleted Items**.

Accept a new goal

You must accept a new goal to get started. By accepting the goal, you are consenting to share information related to the goal with the ordering provider and care team.

1. Sign in to the patient portal.
2. Open the **Goals** tab in either of the following ways.
   > Click **My Health > Goals**.
   > Click the new goal notification on **Action Center**.

   The **Goals** tab is displayed.
3. Click **Click here** to view the new goal.

   Goals opens.
4. (Optional) Select the preferred communication method that you want receive your reminder from.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Select **Email** to get your reminder through an email message. Click **Change** if you want to update your email address. **Email** is the default communication method.
- Select **Text Message** to get your reminder through a text message. Click **Change** or **Remove** if you want to add an alternative cell phone number. This method can only be used if the cell phone number is verified.

If **Email** or **Text Message** are not selected in **My Reminders** when **Continue** is clicked, default reminders are not created.

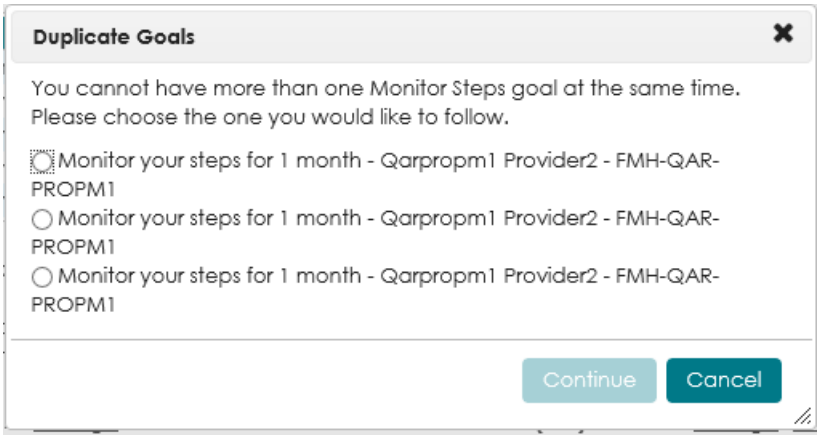
If **Email** or **Text Message** is selected in **My Reminders** when **Continue** is clicked, the default reminders are created.

> **Note:** The goals are not accepted or processed until **Continue** is clicked on **My Reminders**.

5. Select **Accept** for the goals that you want to accept.

   If you accept multiple goals of the same type, **Duplicate Goals** opens.

Figure 12: Duplicate Goals



   The message lists the duplicate goals and you must select the goal that you want to follow and click **Continue**. The goals that you do not select are declined.

6. Click **Continue**.

   The default reminder created by the application is listed. You can accept, edit, or delete the reminder. The accepted reminders are displayed in the table on **My Reminders** in alphabetical order.

7. Click **Continue** to continue to accept the default goal reminder and the goal.

   The **Active Goals** tab is displayed and includes the goals that you accepted. If you have any active goals of the same type, then the active goal is marked complete and given an end date of today. The new goal of the same type replaces the active goal that is completed. All reminders are also removed for the completed goal.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

The ordering provider is sent a notification that the goal was accepted.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

What to do next

Connect to your wireless device, such as a wireless scale, blood pressure monitor, or blood glucose meter, or manually enter additional readings, as needed, if you do not have a wireless device.

Reminders can be changed at any time by clicking **My Reminders** from the **Goals** tab or by clicking **Edit** next **My Reminders** in **Notification Preferences**. Default goal reminders can only be edited or deleted when accepting the goal. You cannot undo an edited or deleted default goal reminder.

Add a reading

You must accept a goal before you can enter a reading.

The goal includes the rules set by your provider. If the rules are broken, your provider receives a notification after your reading is entered. You also receive a goal alert in **Action Center** if your reading violates 1 or more rules set by your provider.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **MyHealth** tab is displayed.
3. Click the **Goals** tab.

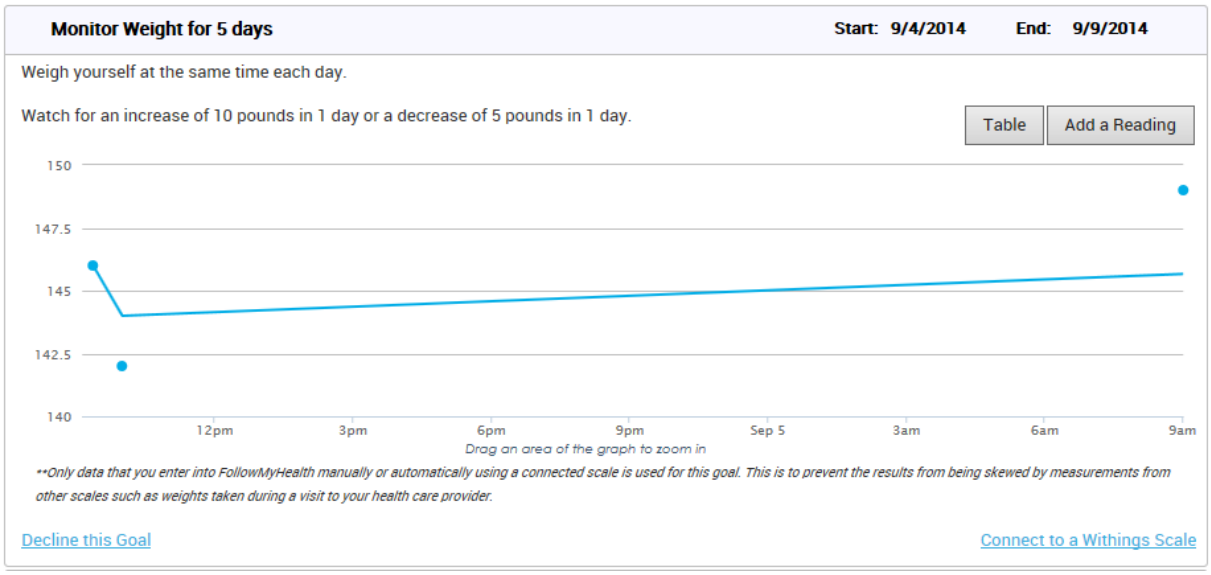
   The **Goals** tab is displayed.
4. Expand the goal that you want to add a reading to.
5. For the first reading, click **enter your current *reading*** or connect to a wireless device to have readings automatically sent to the patient portal.

   For example, if you are entering a weight measurement, click **enter your current weight** or use a compatible device to enter your reading electronically.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

If this is not the first reading, a graph is displayed with your progress. Click **Add a Reading** to add an additional reading.

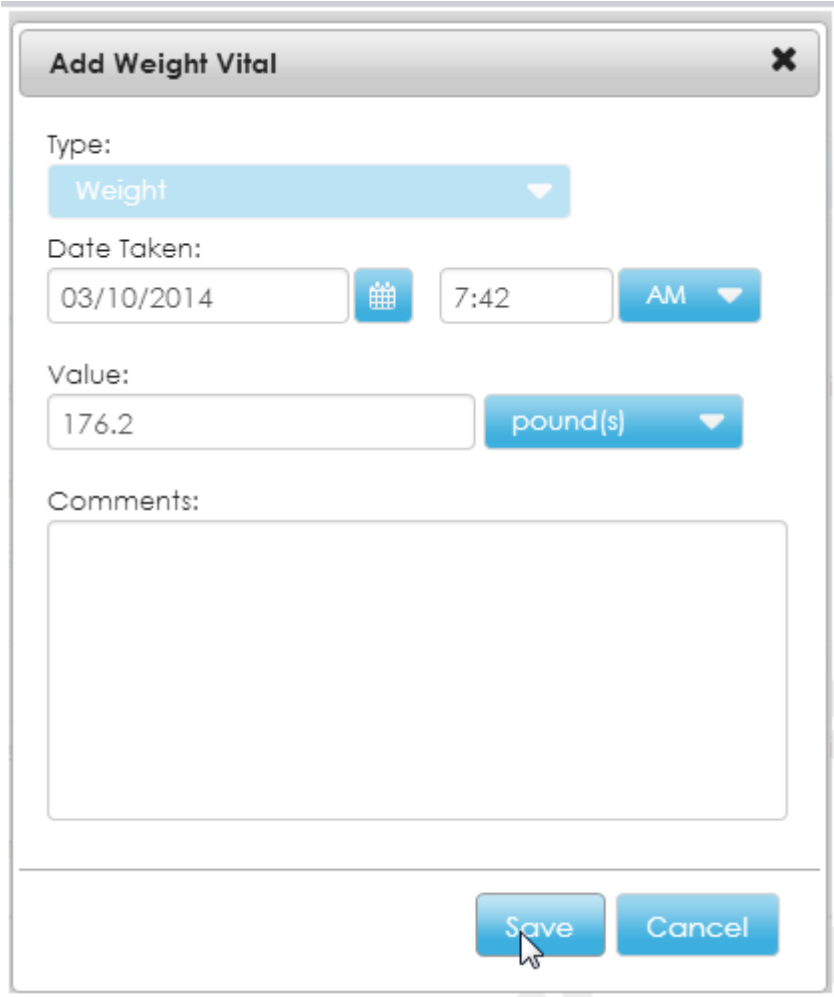
Figure 13: Adding a weight reading



A window opens where you can add your reading.

The following example shows the **Add Weight Vital** window that is displayed when you add a weight reading.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



6. Click **Save**.

Results of this task

The reading is saved in the patient portal and analyzed. A message is displayed as your measurements are analyzed.

If the reading did not break a rule, a message is displayed indicating that analysis is complete and no issues were found.

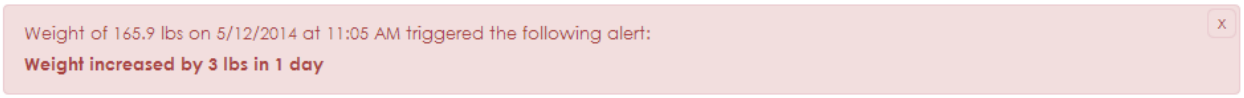
The goal is updated and a graph is displayed. Additional information about each reading is available in a tooltip when you point to each data point.

> **Note:** Only readings that fall within the start and end date are included on the goal.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

If a reading is outside the parameters set by your provider, a goal alert is displayed after the reading is entered.

Figure 14: Goal alert for broken rule



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

An alert is also flagged on the graph and table view.

Figure 15: Goal violation on graph view

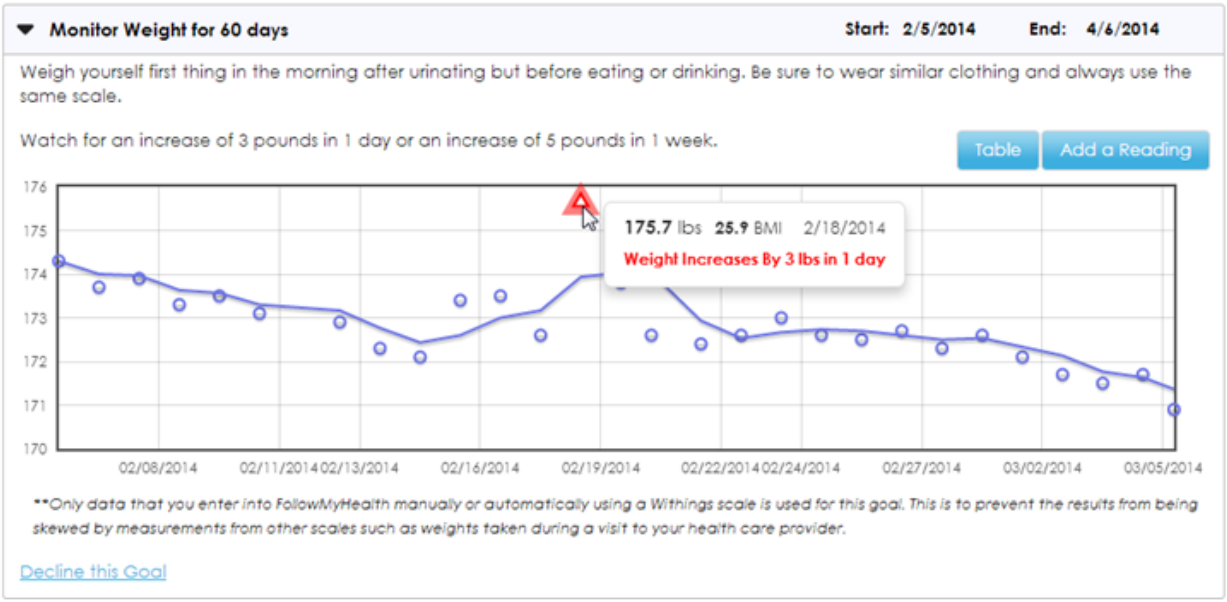
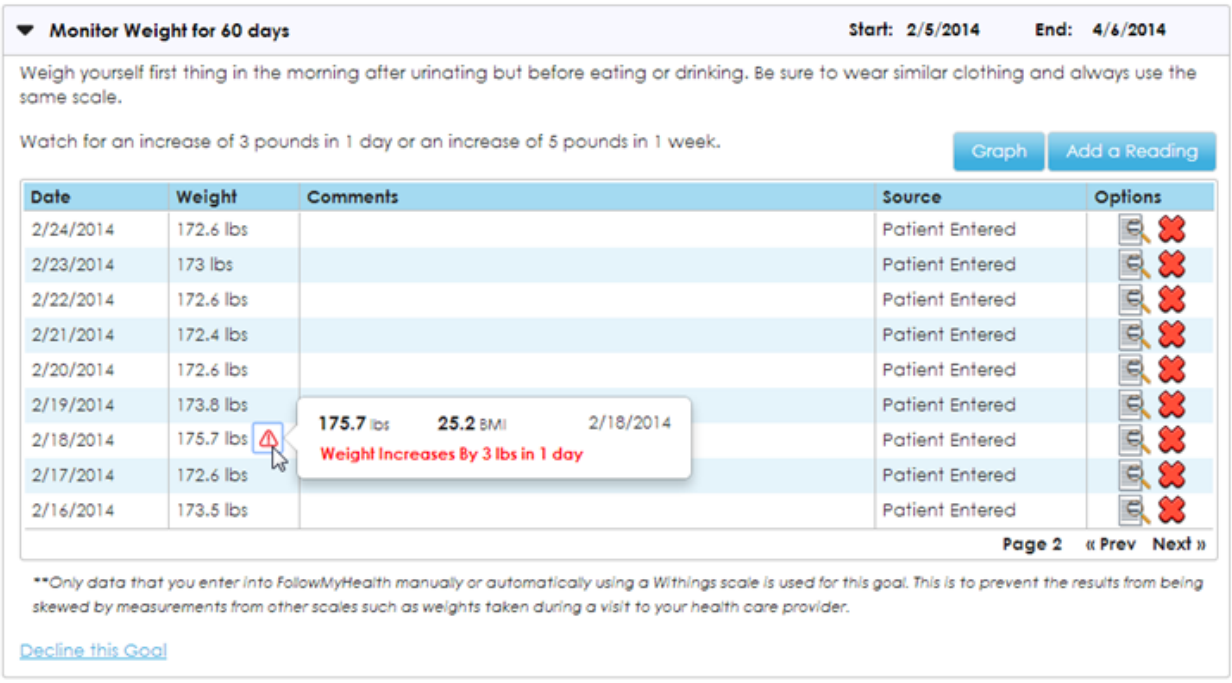


Figure 16: Goal violation on table view



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

What to do next

Enter additional manual readings or connect to a wireless device for measurements to continue capturing readings and working to accomplish your goal.

Decline a new goal

You can decline a goal when it is new or active.

1. Sign in to the patient portal.
2. Open the **Goals** tab in either of the following ways.
   - > Click **My Health > Goals**.
   - > Click the new goal notification on **Action Center** to access the **Goals** tab.

   The **Goals** tab is displayed.
3. Click **Click here** to view the new goal.

   Goals opens.
4. Select **Decline** for the goals you want to decline.
5. Click **Continue**.

   The **Declined Goals** tab is displayed and the declined goal is listed.

Results of this task

The ordering provider is sent a notification that the goal was declined.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

Decline an active goal

You can decline a new or active goal that has been accepted and is listed in **Active Goals** on the **Goals** tab.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Goals** tab.

   The **Goals** tab is displayed.
4. Click **decline this goal**.

   Decline Goal opens.
5. Click **Decline Goal**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

When you decline the goal, the goal is listed under **Declined Goals** with the date that the goal was declined. There are no readings displayed for declined goals.

Results of this task

The ordering provider is sent a notification if you decline the goal.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

Access devices and applications from a goal

You can access **Devices & Apps** from your active goals in the **Goals** tab.

Before you begin

The **Goals** tab is only displayed if your provider has enabled the goals feature.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements for your goal that your provider set for you, the readings are viewable in the patient portal.

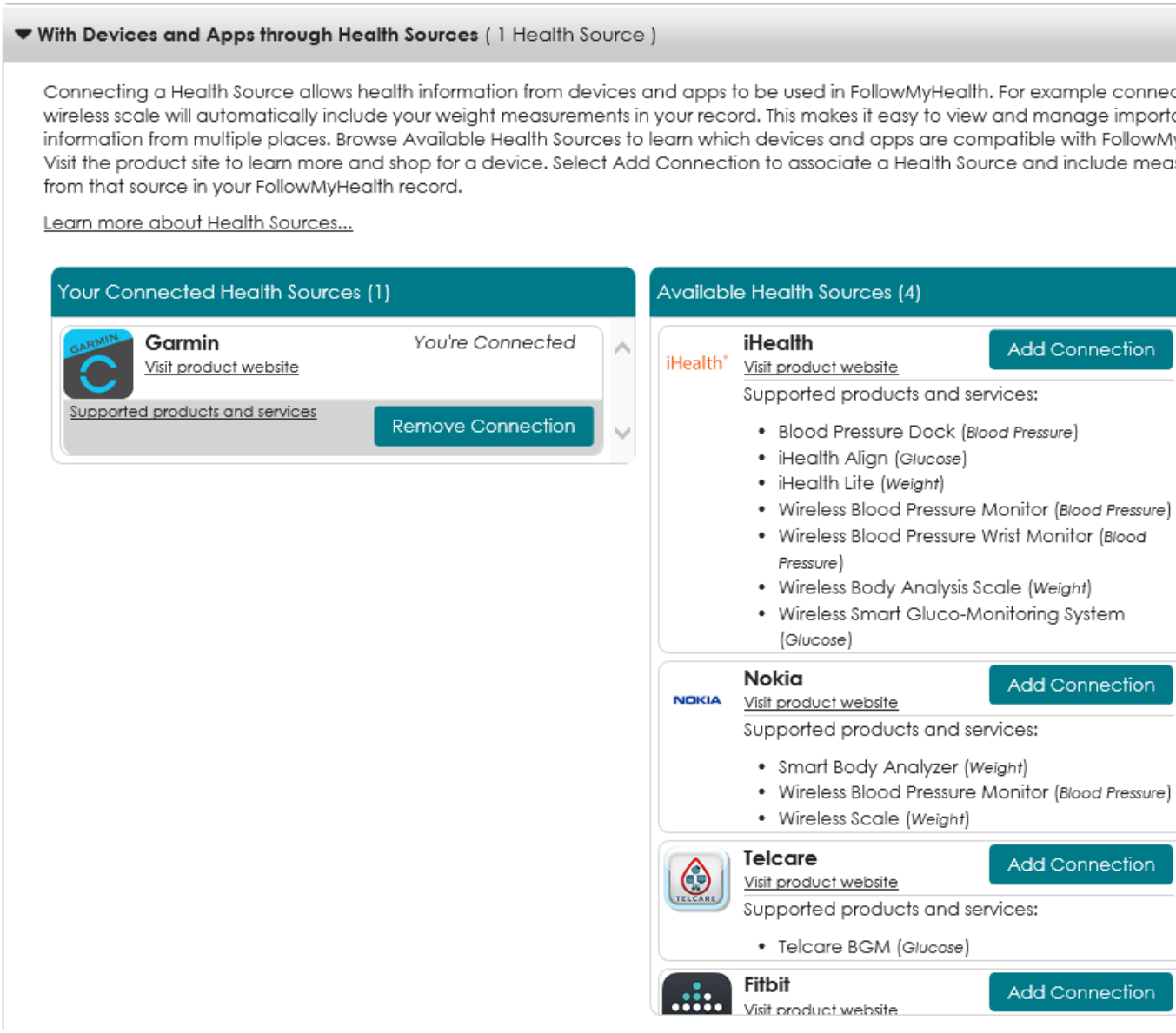
1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Goals** tab.

   The **Goals** tab is displayed.
4. Expand **Active Goals**.
5. From an active goal, click **Devices & Apps**.

   Connections opens and **With Devices and Apps through Health Sources** expands.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Results of this task

You have accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Notifications

Notifications are sent for goal reminders, new goals, completed goals, appointment reminders, personal health record updates, and other health-related reminders.

You can set up goal reminders when you accept a goal or from **My Reminders**. These reminders can be changed at any time.

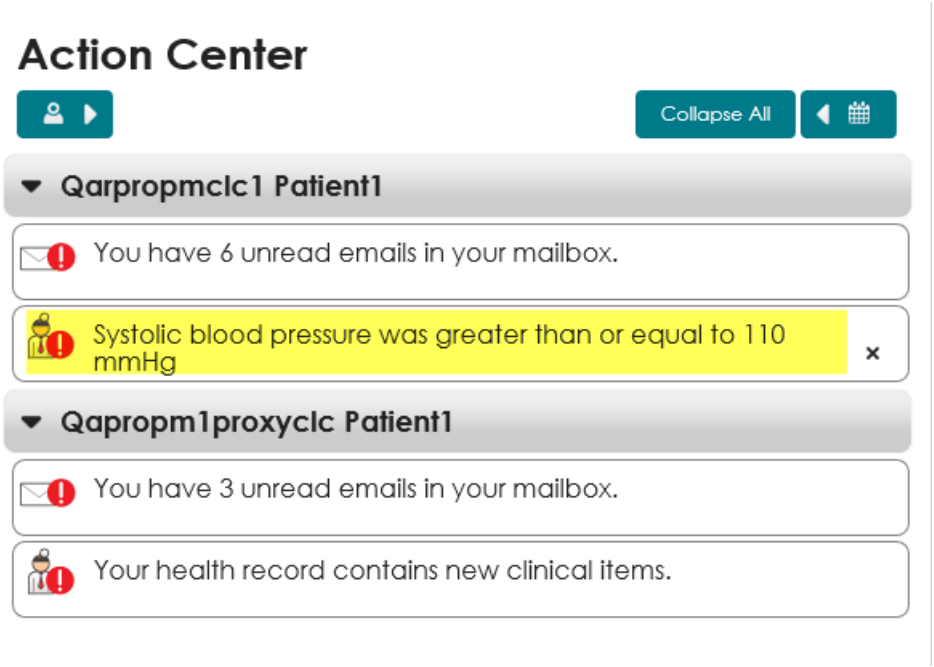
You or an authorized individual can receive goal messages through email and text message.

When a provider creates a new goal for you, you can receive an email or text message, and email message is sent to your **Inbox** in the patient portal.

A new goal action item is also displayed under the **Action Center**.

A goal alert is a type of notification that is displayed in **Action Center** if your reading violates 1 or more rules set by your provider. You or an authorized individual can receive additional goal alerts through email and text message. Goal alerts are also displayed as banners on the **Goals** tab when you manually enter readings.

Figure 17: Goal alerts are displayed in Action Center



You can configure the notification method when you add the goal reminder, on the **Notification Preferences** tab, or when you accepting a goal from the **Goals** window. You cannot turn off notifications for broken rules from displaying in **Action Center**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Add a reminder

You can add a reminder to notify you when to take measurements, when your goal ends, or other customized reminders. These can be sent through emails or text messages.

You can also accept default reminders during the goal acceptance process.

1. Sign in to the patient portal.
2. Click the **My Health** tab.

   The **My Health** tab is displayed.
3. Click the **Goals** tab.

   The **Goals** tab is displayed.
4. Click **My Reminders**.

   My Reminders opens.

   If you have reminders, a table lists the reminders. If you do not have reminders, only the communication method settings are displayed.

   > **Note:** You can also open **My Reminders** when you click **Edit** in the **My Reminders** section in **My Account > Preferences > Notification Preferences**.
5. Select the communication method for receiving your reminder.
   - Select **Send email reminders** to get your reminder through an email message. Click **Change** to update your email address. **Send email reminders** is selected by default.
   - Select **Send text message reminders** to get your reminder through a text message. Click **Add a cell phone number** to add an alternative cell phone number. This method can be used only after the cell phone number is verified.
   - Click **Edit and remove** if you already have a cell phone number added and want to edit or remove the number.
6. Click **Add Reminder**.

   Reminder opens.
7. For **Name**, enter a name for the reminder.
8. For **Type**, select how often you want to receive the reminder.

   Valid values are:
   - **Once**
   - **Daily** (default)
   - **Weekly**

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- **Monthly**
- **Yearly**

The type selected determines the **Frequency** preferences that are displayed.

9. For **This is a reminder to**, select the reason for the reminder.

   Valid values are:

   - **Do something** (default)
   - **Take weight**
   - **Take blood pressure**
   - **Take blood glucose**

10. For **Reminder Text**, enter the information that you want to see in the reminder. This is the text that is emailed or text messaged to the number provided.
11. For **Frequency**, enter how often, the day of week, and the time of day that you want the reminder to occur.

    The reminder type selected in step 6 determines the **Frequency** preferences that are displayed.

Daily

The value must be a whole number that is greater than 0 (zero) and less than or equal to 365. The default is 1 day.
The time of day must be valid and set according to your time zone. The default time is now.

At least 1 day of the week must be selected.

Monthly

Select an exact day of the month, for example the 15th of each month. Or, select a relative day of the month, for example, the last Sunday of the month.
If you select an exact day of the month, the numeric value is displayed and the current day is the default. This value must be a valid day of the month with a value between 1 and 31. When the reminder is scheduled to a date that the month does not reach, the last day of the month is changed to the last day of that month. For example, if you select 31 and the month is June, the number is changed to 30. If the reminder occurs on the last day of the month, set the value to 31 and the application changes the value to the last day of the month when scheduling the reminder.

If you select **The**, the other day boxes are replaced with the day of the week and the day within the month it counts for. For example, The Third Tuesday. The value that is entered in the month box must be between 1 and 12.

The time of day must be valid and set according to your time zone. The default time is now.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Weekly

The value must be a whole number that is greater than 0 (zero) and less than or equal to 52. The default is 1 week.
The time of day must be valid and set according to your time zone. The default time is now.

At least 1 day of the week must be selected.

Yearly

The value must be a whole number that is greater than 0 and less than or equal to 20. The default is 1 year.
The time of day must be valid and set according to your time zone. The default time is now.

Month and day defaults to today. The month list includes all 12 months. The day must be a whole number between 1 and the number of days in the selected month. Do not enter more than 31.

Once

The date must be in the future. The default is today's date.
The time of day must be valid and set according to your time zone. The default time is now.

12. For **Duration**, select the start and end date from the calendar tool.

    The default start is the current date.

    The duration type has the following valid values:

    - **No end date** (default)
    - **End by**
    - **End after**

    If **End by** is selected, a date box is displayed. You must enter the end date with the calendar tool.

    If **End after** is selected, an occurrences box is displayed. You must enter the number of times that you want the reminder to occur. The number must be a whole number greater than 0 (zero).

13. Click **Set Reminder**.

    When you click **Set Reminder**, a validation process is started. If there are no validation errors, the reminder is saved.

    > **Important:** If you click close before you click **Set Reminder**, **My Reminders** closes and your changes are not saved.

Results of this task

The reminder is displayed in the table on **My Reminders** in alphabetical order.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Delete a reminder from My Reminders

You can delete a reminder from **My Reminders**.

You can also delete default reminders during the goal acceptance process.

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Goals** tab.
   The **Goals** tab is displayed.
   You can also view reminders from **Notification Preferences**.
4. Click **My Reminders**.
   My Reminders opens and the reminders are listed.
5. Click the reminder that you want to delete.
   The reminder details are displayed.
6. Click **Delete**.
   Confirm Delete opens.
7. Click **Delete**.

Results of this task

You have deleted the reminder and it is removed from **My Reminders**.

Edit a reminder from My Reminders

You might want to change a reminder. In this scenario, you can edit the reminder from **My Reminders**.

1. Sign in to the patient portal.
2. Click the **My Health** tab.
   The **My Health** tab is displayed.
3. Click the **Goals** tab.
   The **Goals** tab is displayed.
4. Click **My Reminders**.
   My Reminders opens, and the reminders are listed.
5. Click the reminder that you want to edit.
   The reminder details are displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

6. Enter the changes for the reminder.
7. Click **Set Reminder**.

   The reminder closes and the reminders list is updated to reflect your changes.

Results of this task

You have edited the reminder.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 8

Video visits

Video visits enable you to participate in a real-time clinical consultation with your provider through the patient portal.

There are two types of video visits:

- On-demand video visit
- Scheduled video visit

Supported browsers

- Mozilla Firefox®
- Google Chrome™
- Microsoft® Internet Explorer® 10.0 and later. Refer to the information under "Video client plug-in" for information about the requirement to download a one-time executable file.
- Apple® Safari®. Refer to the information under "Video client plug-in" for information about the requirement to download a one-time executable file.

System requirements

- Microsoft® Windows® 7.0 or later

  > **Note:** Microsoft® Internet Explorer® on Windows 8.1 is not supported with the Video client plug-in.

- Apple® Mac® OS X 10.0 or later
- Recommended camera peripherals: Logitech™ Pro Webcam C920 or Logitech™ Pro Webcam C930e for PC or Mac
- Recommended audio peripherals: PC Webcam microphone or internal audio for Mac

Video client plug-in

If you are using Microsoft® Internet Explorer® or Apple® Safari®, you must download the video client plug-in before you can start a video visit.

When the video window is displayed for the first time, you are prompted to download the plug-in executable. **You need to install a plug-in to have a Video Visit** is displayed in the video window. Click **Download plug-in**. The plug-in is downloaded to your `Downloads` folder on your personal computer. Go to your `Downloads` folder and install the plug-in.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

After the installation is complete, the video session is refreshed automatically. Patients are also prompted during the on-demand request/check-in flow to install the plug-in. After doing so, the window is refreshed automatically, and the user must re-authenticate.

If you are using the Mozilla Firefox® or Google Chrome™ browser, the plug-in is not required and you are not prompted to download the plug-in.

When there are software updates available for the video client plug-in, a message is displayed on the video window before you can proceed with the video visit. Download the plug-in update and restart your Internet browser before continuing with the video visit.

Microphone and camera

All browsers require that you share your computer microphone and camera. The first time that you access the video window, the browser prompts you to confirm that you are sharing the microphone and camera. The available peripherals are displayed as options. Select **Always Share** so that you are not prompted the next time you start a video visit.

On-demand video visits

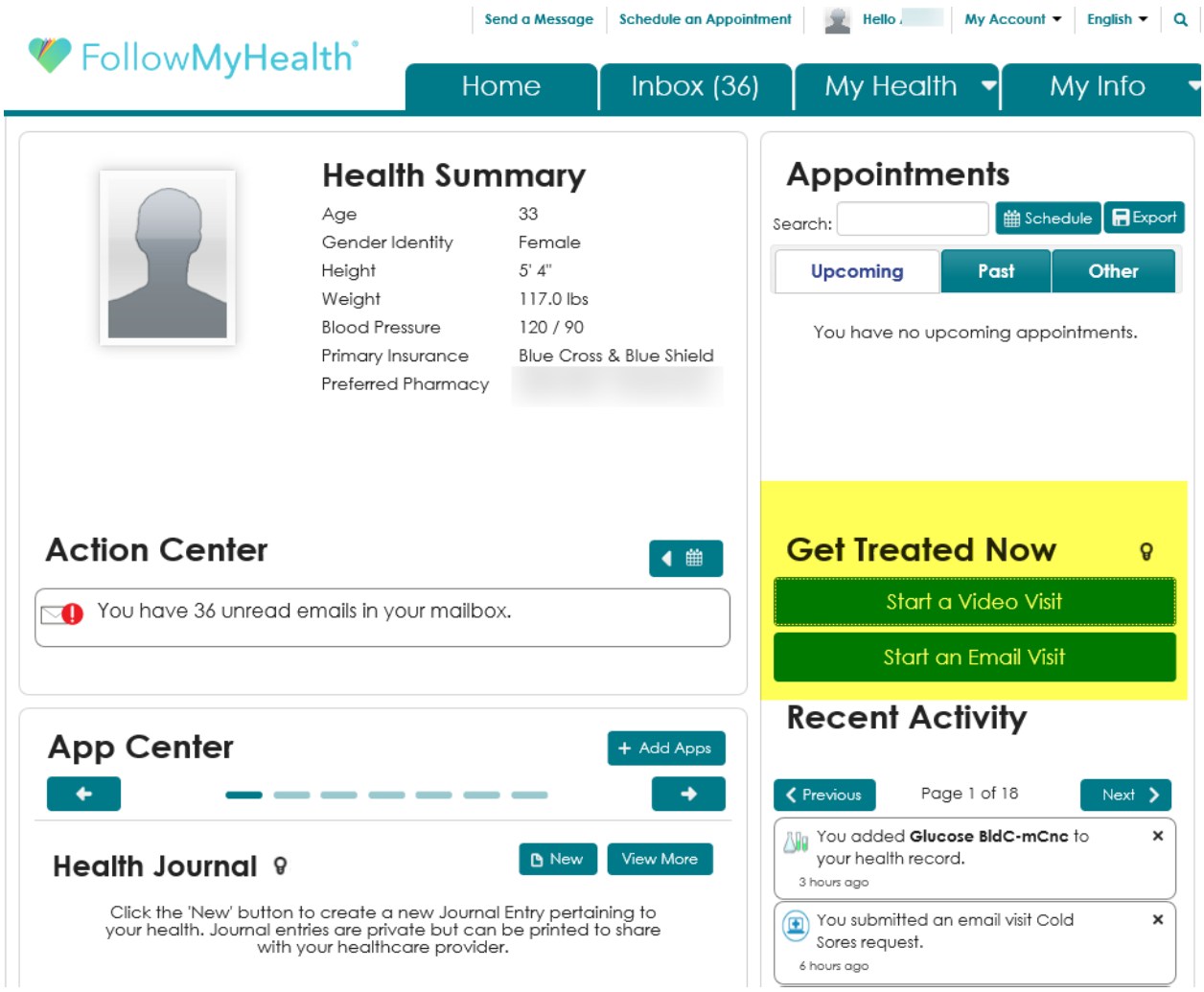
The Allscripts FollowMyHealth® Telehealth Video Visit feature enables you to have a real-time clinical consultation with a provider through a video conference.

> **Note:** You must have an Internet Explorer v10 or later to participate in a video visit.

You can participate in on-demand video visits with a provider in your healthcare organization.

An on-demand video visit is started when you click **Start a Video Visit** from the **Get Treated Now** section on your patient portal **Home** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



In this workflow, you can select a provider who is available for a video visit on the same day.

You must have a connection with an organization that supports scheduled video visits. If your organization does not support video visits, the video visit appointment type is not available during the schedule appointment type workflow and the **Start a Video Visit** button is not available.

If the provider that you connected with in the video visit supports payment features, you can pay for your video visit at the time of the service.

If the healthcare organization that your provider belongs to has enabled support for attachments, you can share attachments with the provider during the video visit.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

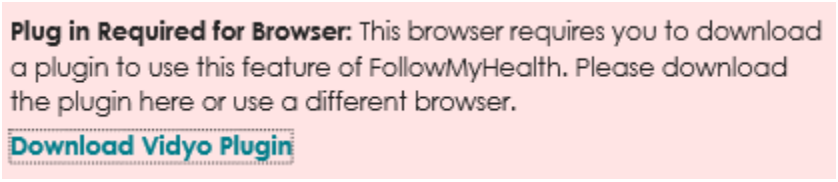
Start an on-demand video visit

On-demand video visits are a convenient alternative to travelling to your healthcare organization for a visit with a provider. You can consult with a provider from a remote location using a desktop computer or tablet through your patient portal account.

Before you begin

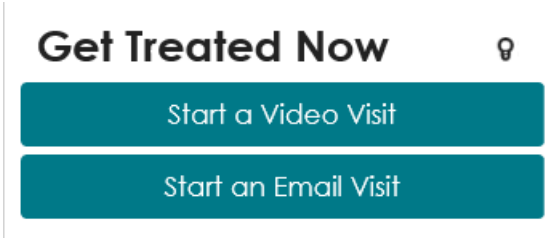
Ensure that you have the video client plug-in installed and are sharing your video and microphone peripherals. Read the system requirements information in "Video visits" to ensure that you have the correct video client plug-in and microphone peripherals.

When you start the video visit and **Request a Video Visit** displays, the application automatically detects if you have the most current plug-in installed and supported browser. A message is displayed on the window if these requirements are missing. A link is available to download the latest plug-in. Or, you can use a browser that is supported by the plug-in.



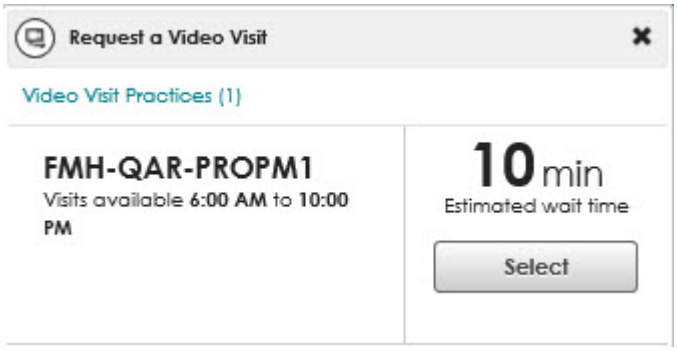
As you progress through a video visit, the **Action Center** on your patient portal **Home** tab displays notifications. Refer to "Action Center video visit notifications" to learn more about the notifications you see during the video visit workflow.

1. Sign in to the patient portal.
2. From the **Home** tab, go to **Get Treated Now** and click **Start a Video Visit**.



Request a Video Visit opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

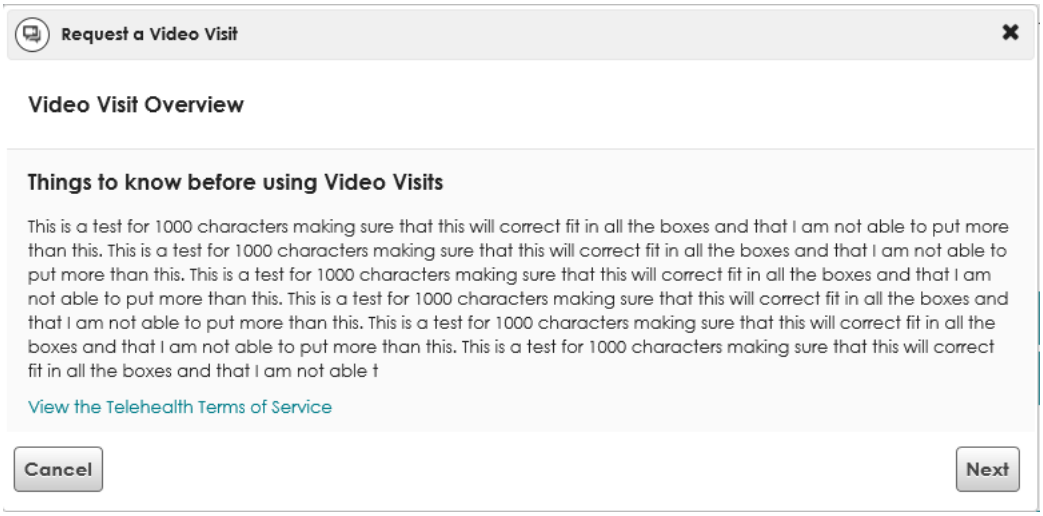


The organizations that are available for an on-demand video visit are displayed with available office hours under **Video Visit Practices**.

The estimated wait time is displayed next to the organization.

3. Click **Select** next to the organization that you want to have a visit with.

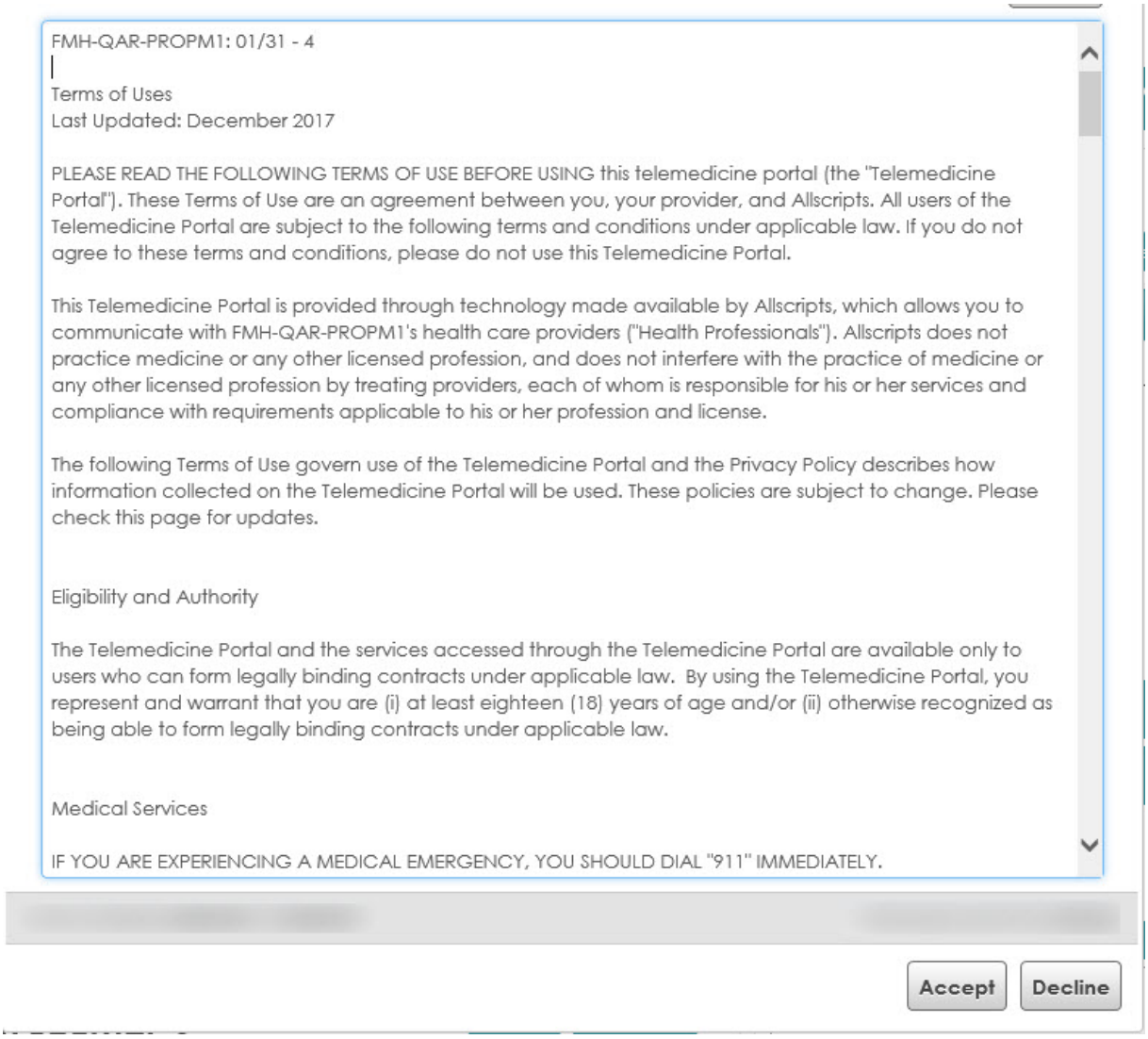
   Video Visit Overview is displayed.



4. Click **Next**.

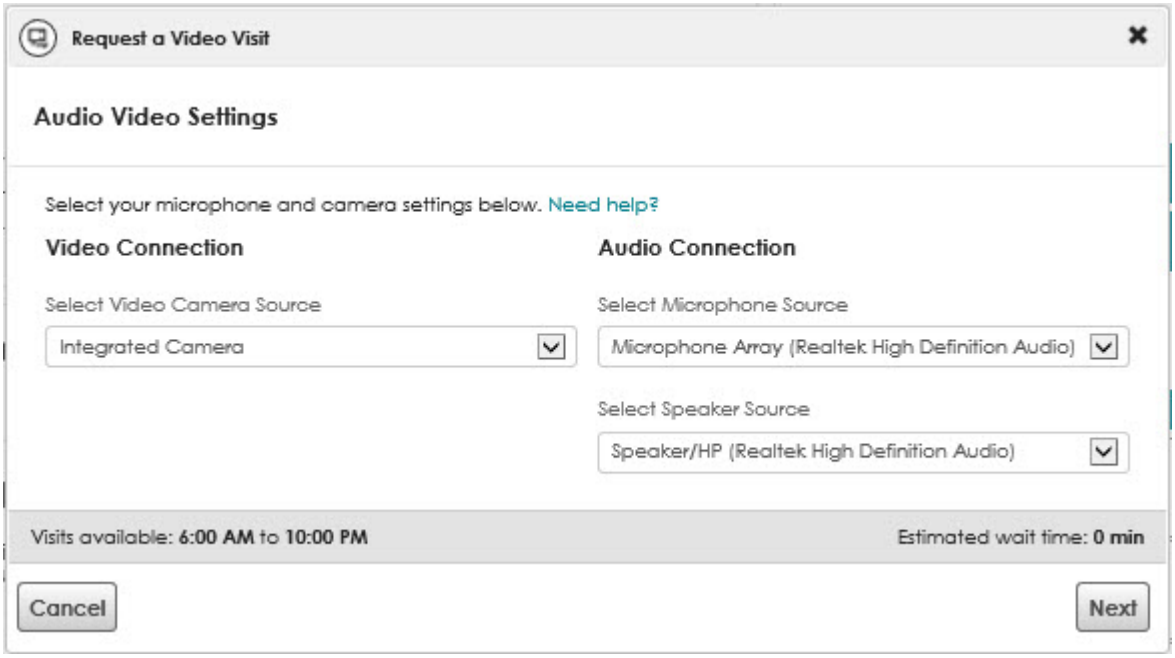
   Telehealth Terms of Service is displayed.

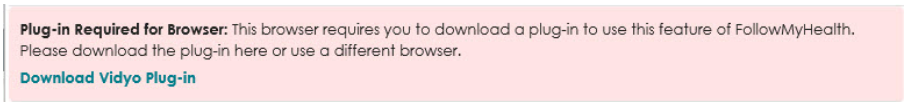
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Click **Accept**.
   Audio Video Settings is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



> **Remember:** If your application detects that you do not have the correct plug-in, the following error is displayed. You can click **Download Vidyo Plug-in** to install the correct plug-in.
>
> 
>

Follow the prompts to install the video plug-in. After installation is complete, you are automatically sign out of the patient portal. When you sign back in, the video and audio settings are filled.

6. Select the video and audio connection sources.

   If you need assistance with audio and video settings, click **Need help**.

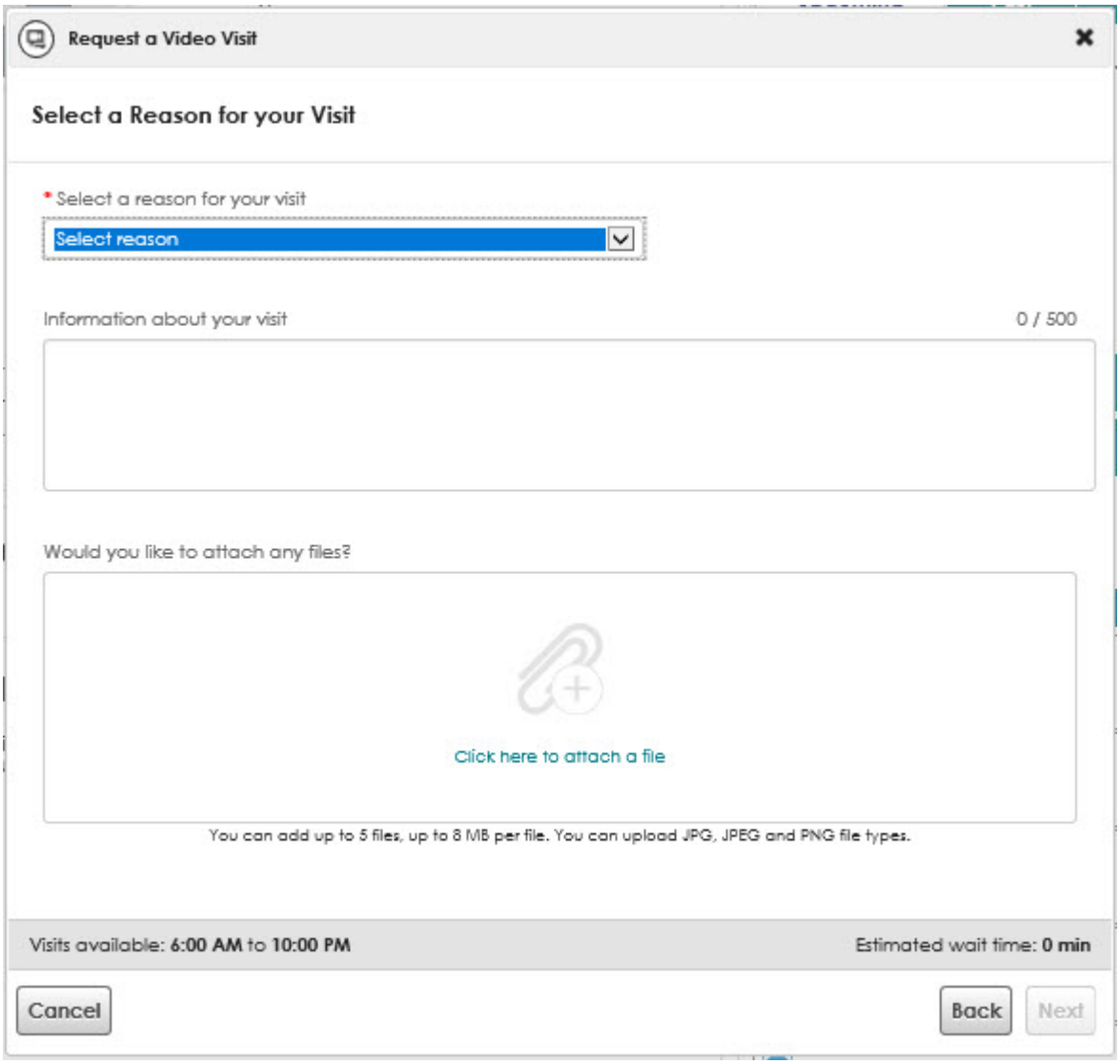
   A link is available here to find answers on the **Frequently Asked Questions** support page.

7. Click **Next**.

   Select a Reason for your Visit is displayed.

8. Click **Select reason** to display a list of symptoms.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



A list of symptoms is displayed.

9. Select your symptom from the drop-down list.

   When the video visit is started and the video window is displayed, the reason for your visit is displayed in the right pane under **Summary**.

10. (Optional) Enter information about your issue in **Information about your visit**, if you have additional information that you want your provider to know.

    File Upload is displayed.

11. (Optional) To add attachments, click **Click here to add an attachment** in **Would you like to attach any files**.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

This step is an optional feature. The **Would you like to attach any files** box is not displayed unless your provider has the attachments option enabled.

File Upload is displayed.

12 Attach files that are related to your condition that you want your provider to review.

You can attach files in either of the following ways.

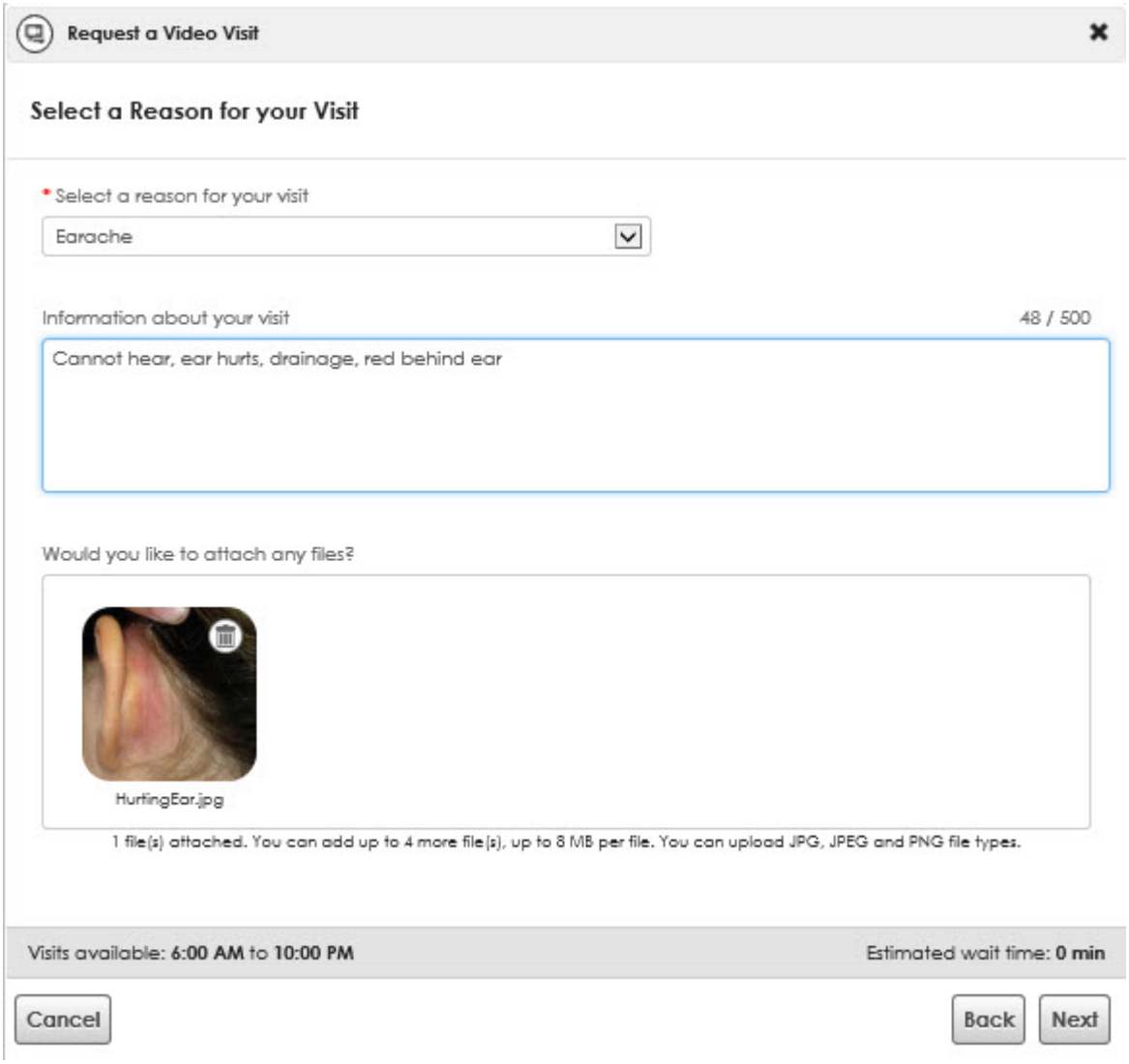
- Drag and drop files from a folder on your computer into **File Upload**.
- Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to 5 files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

Upon completing the video visit, the file is accessible to the provider through the video visit message template.

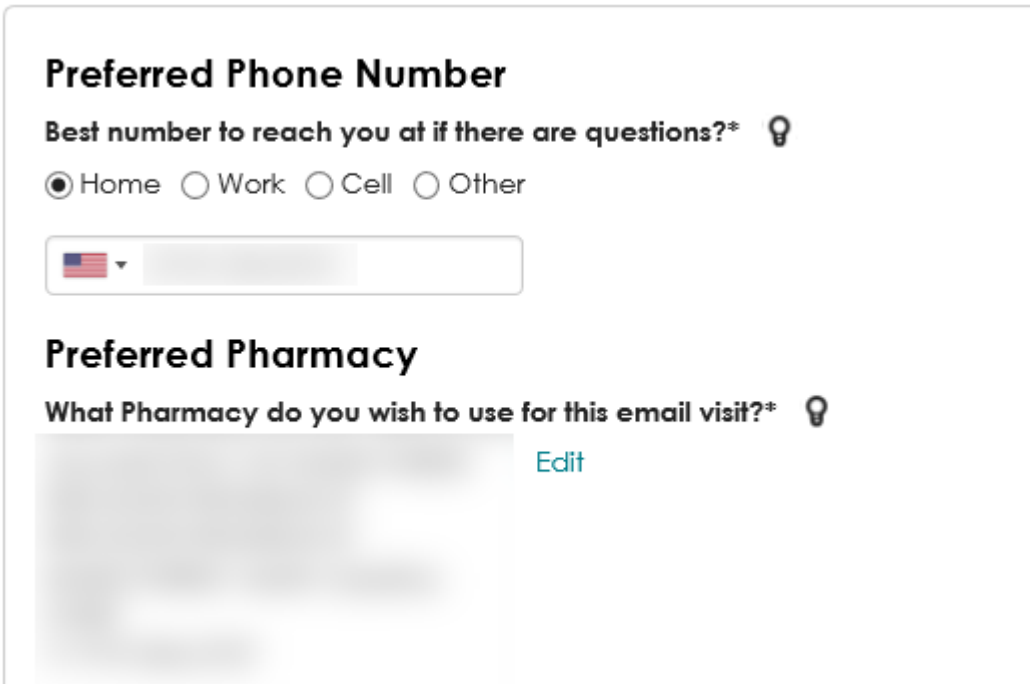
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



13. Click **Next**.

    Your demographic information is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



14. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.

    When the video visit is started and the video window is displayed, this information is displayed in the right pane. Ensure that you provide the preferred phone number and pharmacy so that your healthcare provider can contact you or send a prescription promptly after the video visit, if needed.

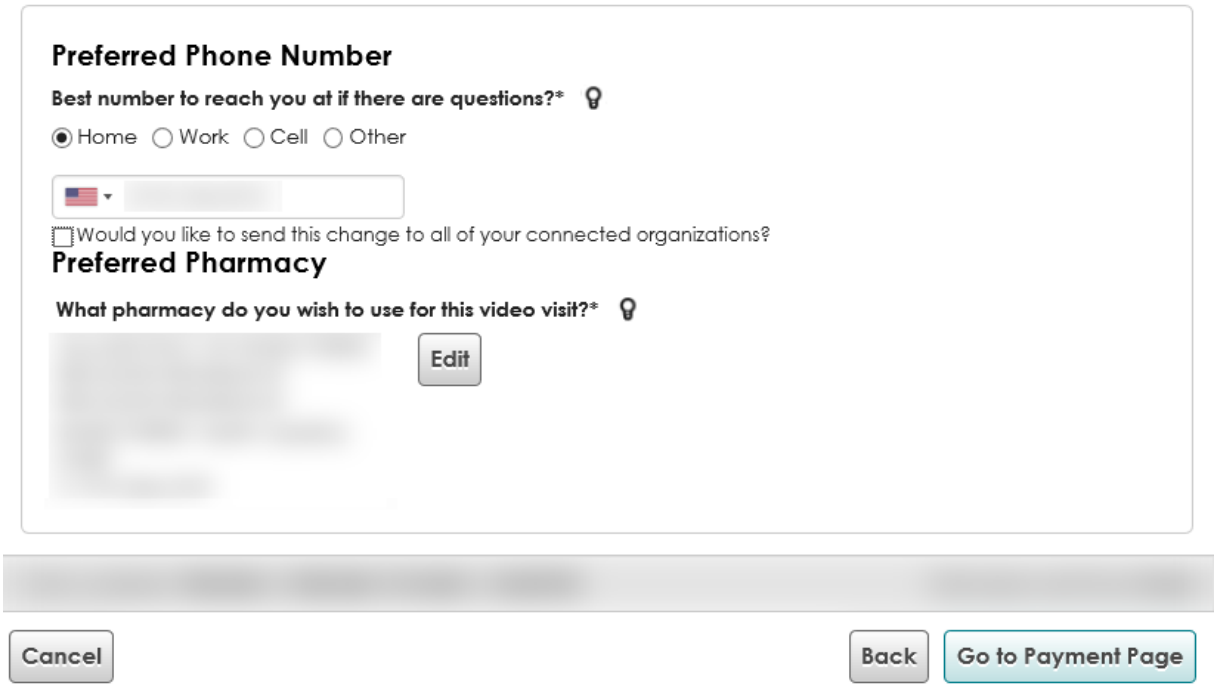
15. If you change your demographic information and want to share the change with all other organizations that you are connected with, select **Would you like to send this change to all of your connected organizations**.
16. Click **Go To Payment Page** or **Go To Virtual Waiting Room**, depending on the following scenarios.

    The **Go To Payment Page** button is displayed if your organization has enabled the on-demand video visit payment feature. The **Go To Virtual Waiting Room** button is displayed instead of

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

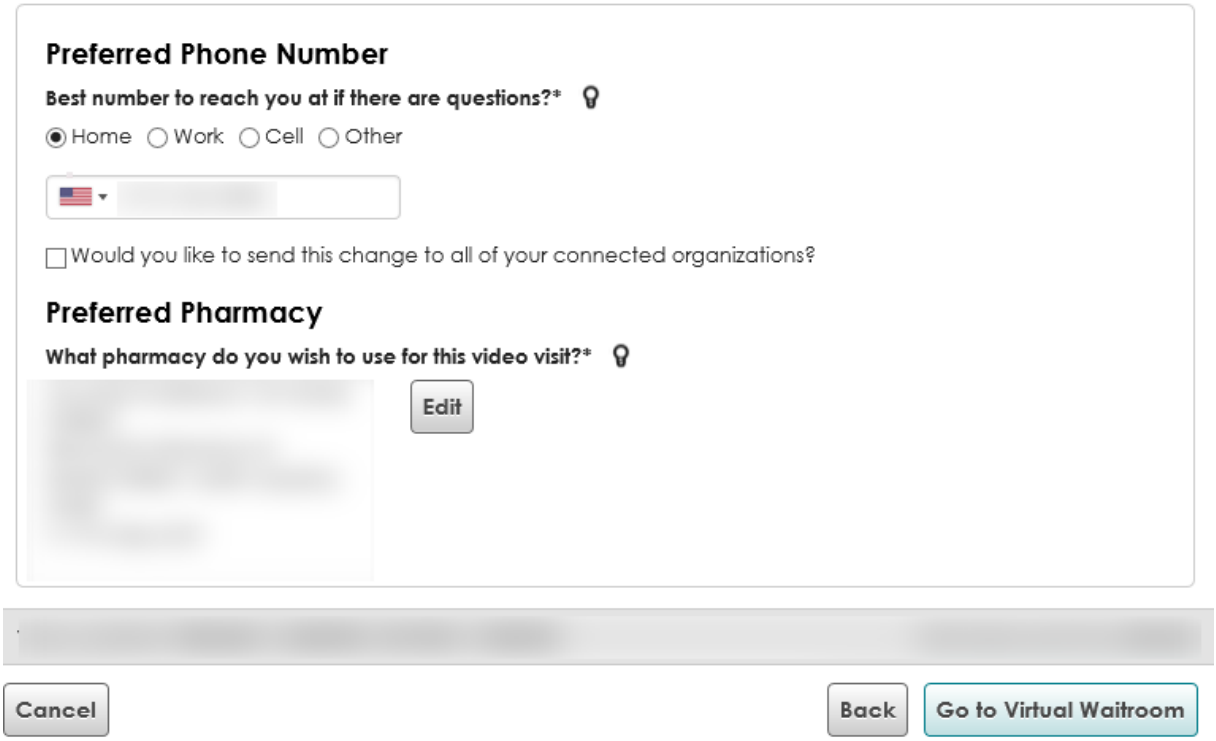
the **Go To Payment Page** button if your organization has not enabled the on-demand video visit payment feature.

Figure 18: Payment feature enabled: Go To Payment Page is available



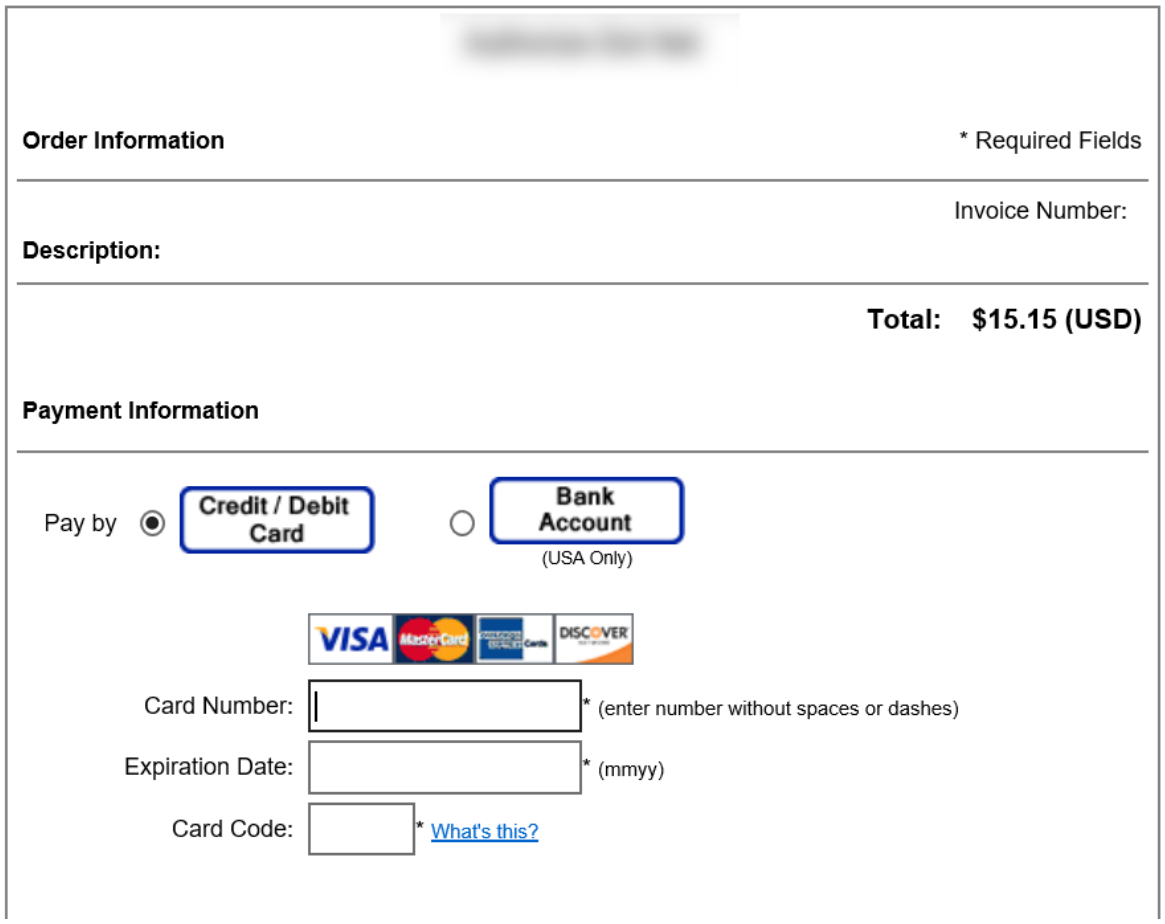
Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Figure 19: Payment feature not enabled: Go To Virtual Waiting Room is available

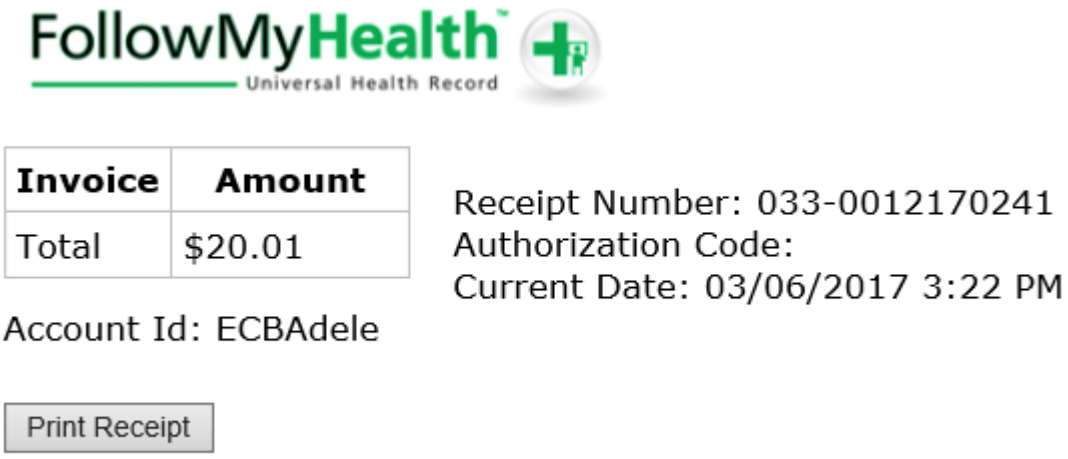


> **Your provider has the payment feature enabled and you can now make a payment.**
Click **Go To Payment Page**.
The payment page is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

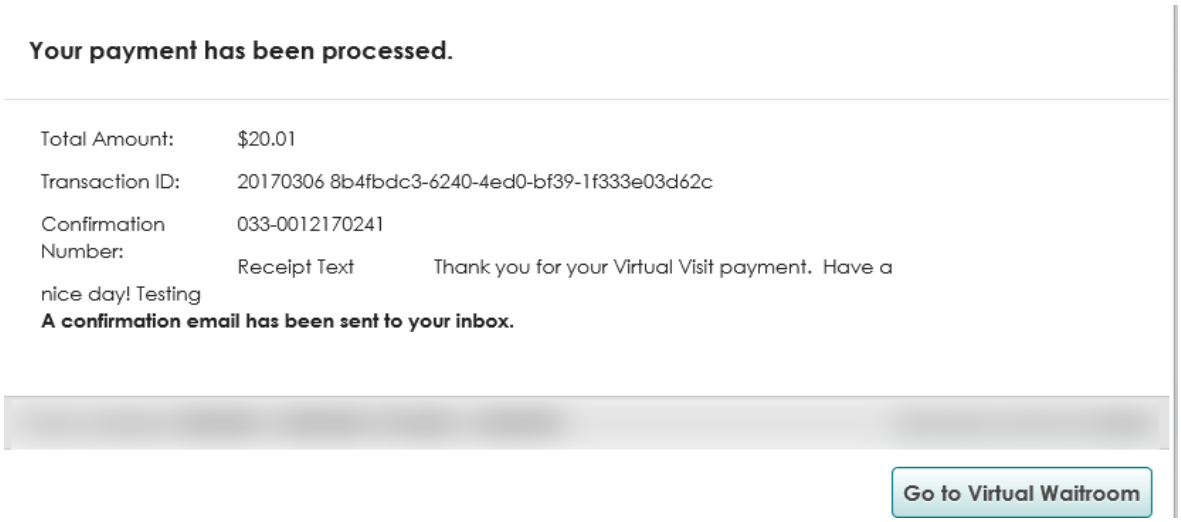


Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

After your payment is processed, a summary of your payment is displayed.

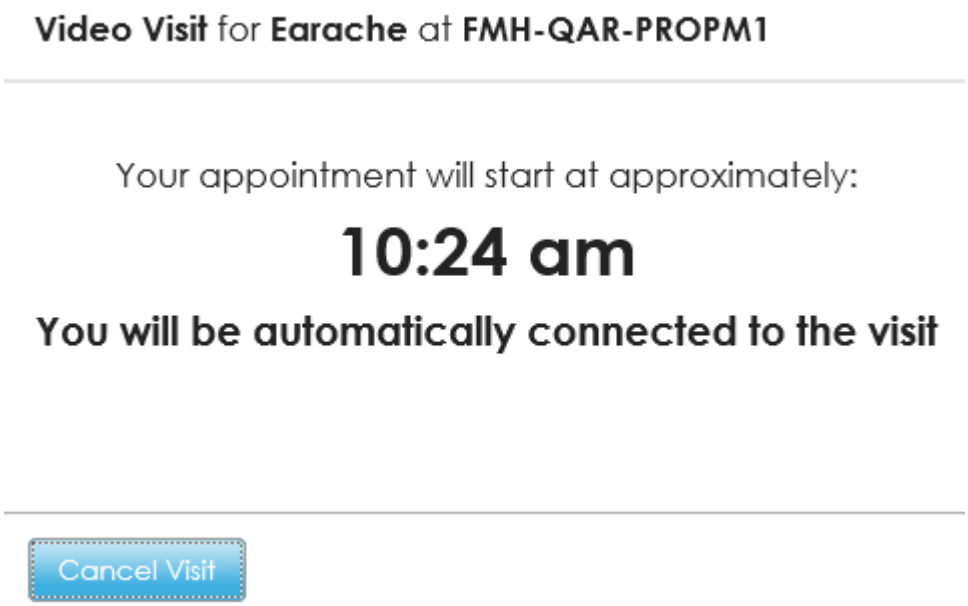


Continue to step 10.

> **Your provider does not have the payment feature enabled and you cannot make a payment at this time.** Continue to step 10.

17. Click **Go to Virtual Waiting Room**.

    Virtual Waiting Room is displayed.



Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

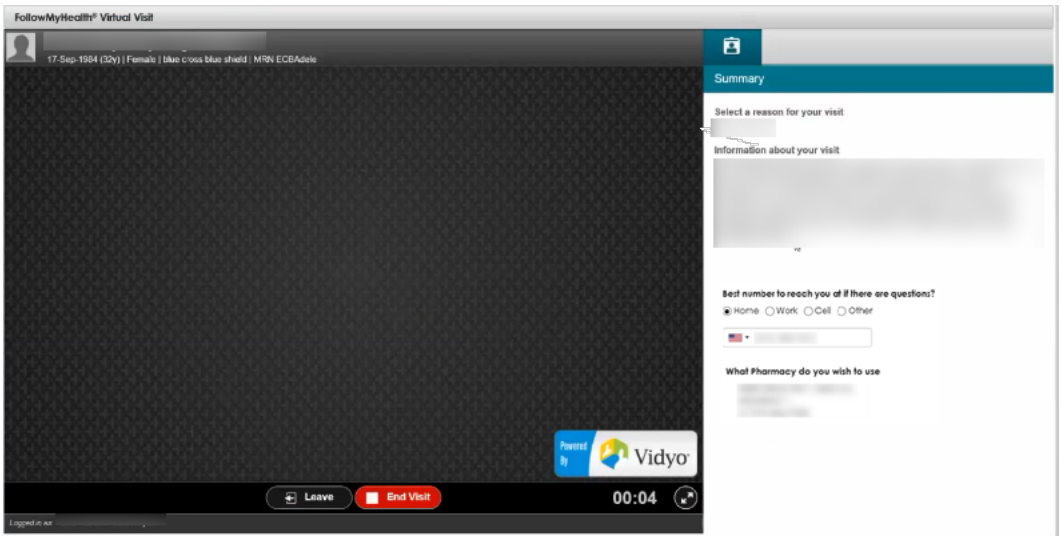
You are now in the virtual waiting room and you are an active patient in the provider's patient queue. The reason for your visit, the organization the visit is with, and the approximate time that your visit starts are shown.

Alternatively, you change your audio and video settings from the **Virtual Waiting Room**. Click **Change Audio/Video Settings** to open **Virtual Waiting Room Audio Video Settings**.

Your provider can send a notification to update you on the wait time. A notification is displayed on **Virtual Waiting Room** or sent to you through email or text.

When the provider selects you in the queue, your on-demand video visit automatically begins. The video window opens and the provider is available.

The reason for your visit and additional information that you entered during the video visit process are displayed in the right pane under **Summary**. Your preferred phone number and pharmacy are also displayed in the right pane.



18. (Optional) Leave the video session.

    If you want to leave the visit during the session, you can rejoin the same session.

    Click **Leave** to close video window. The video session closes.

    If you want to return, click **Video Visit in Progress – Reconnect** on the **Home** tab under **Get Treated Now** and the session reconnects.

    The video screen reopens and you can continue with the video visit.

19. Click **End** to end the on-demand video visit.
20. (Optional) Plan your follow-up visit and if you requested that the provider send you a visit summary through email, check your **Inbox** tab to view the visit summary.

Results of this task

You have completed an on-demand video visit with a provider and reviewed your visit summary.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Scheduled video visits

A scheduled video visit is real-time clinical consultation with a provider through a video conference that is scheduled for a future date.

The scheduled video visit workflow starts when you click **Schedule** from the **Appointments** section on the **Home** tab. You must select a video visit appointment type to schedule a video visit.

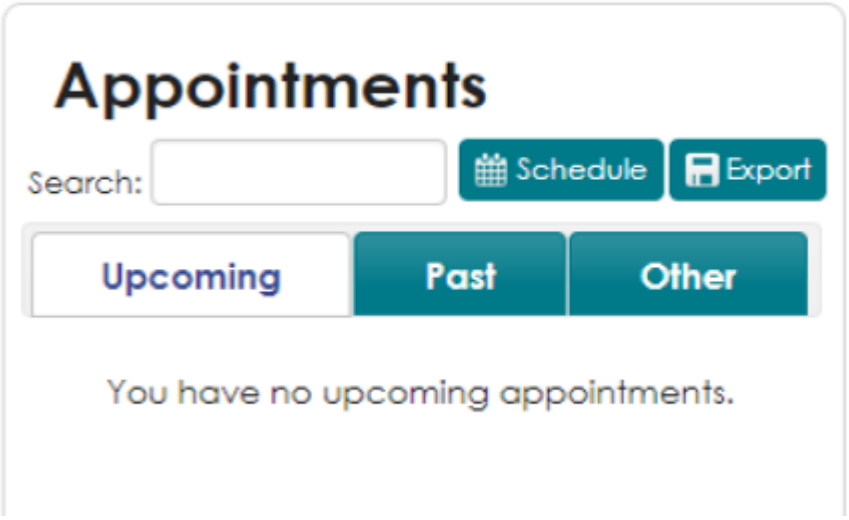
After the video visit is scheduled, the appointment is displayed in your **Upcoming** appointments. You can join your video visit up to 15 minutes before the start time.

> **Note:** You must have an Internet Explorer v10 or later to participate in a video visit.

Schedule a video visit

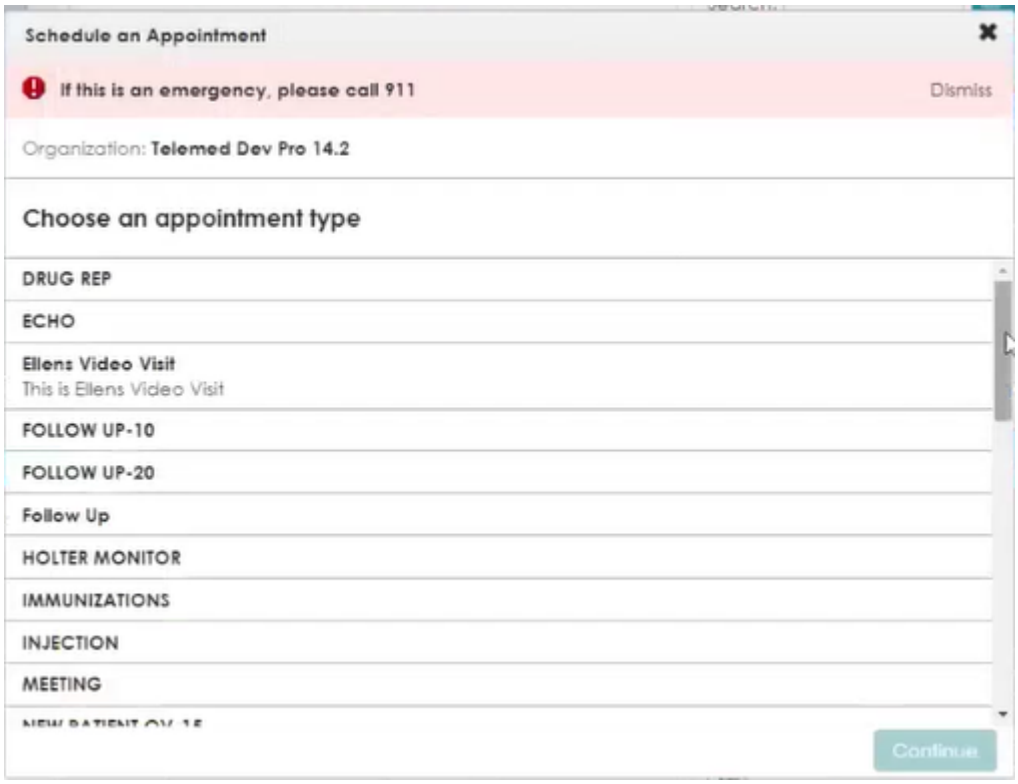
A video visit can be scheduled the same day or in the future. If you want to talk to a provider now, follow the steps in "On-demand video visits".

1. Open the patient portal.
   The **Home** tab is displayed.
2. From **Appointments**, click **Schedule**.



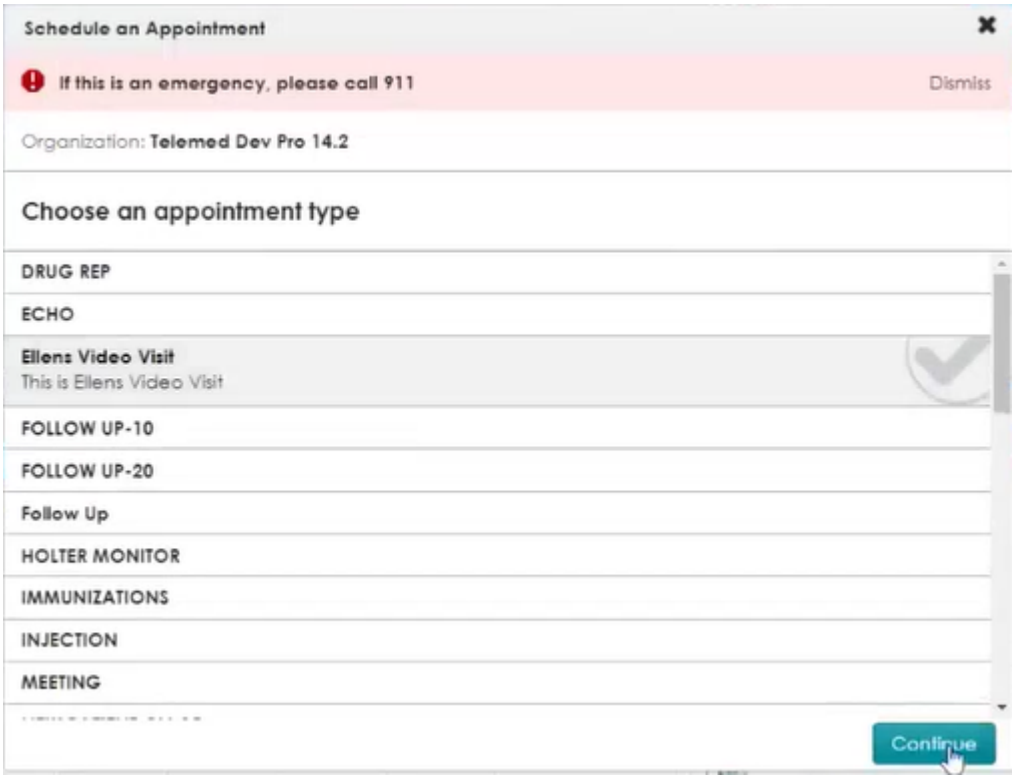
Choose an Appointment Type is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. Select the appointment type that you want.

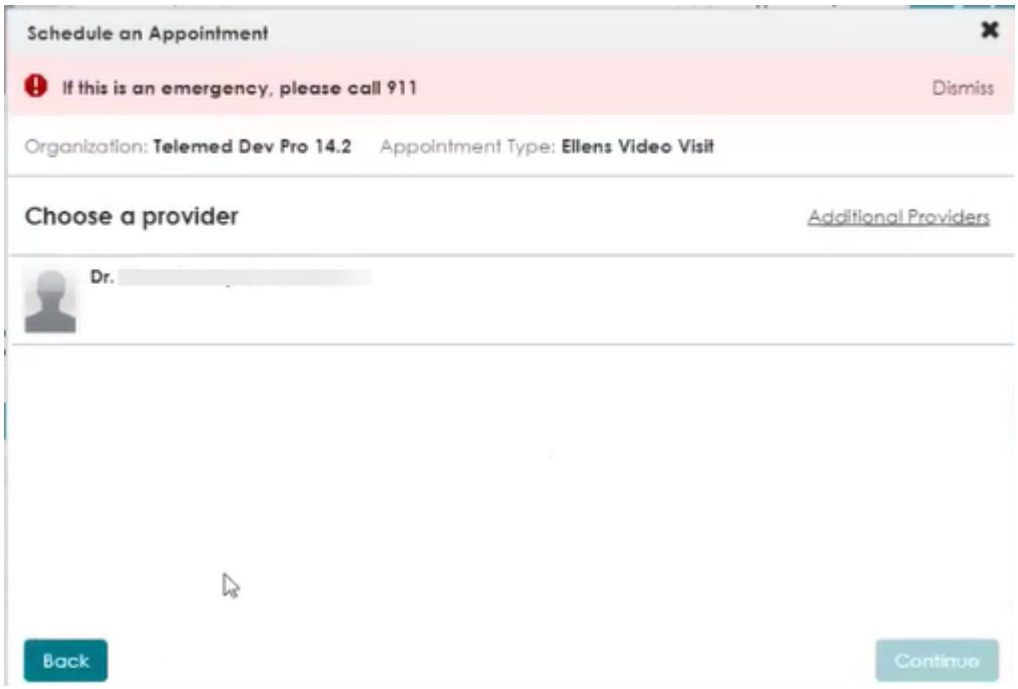
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



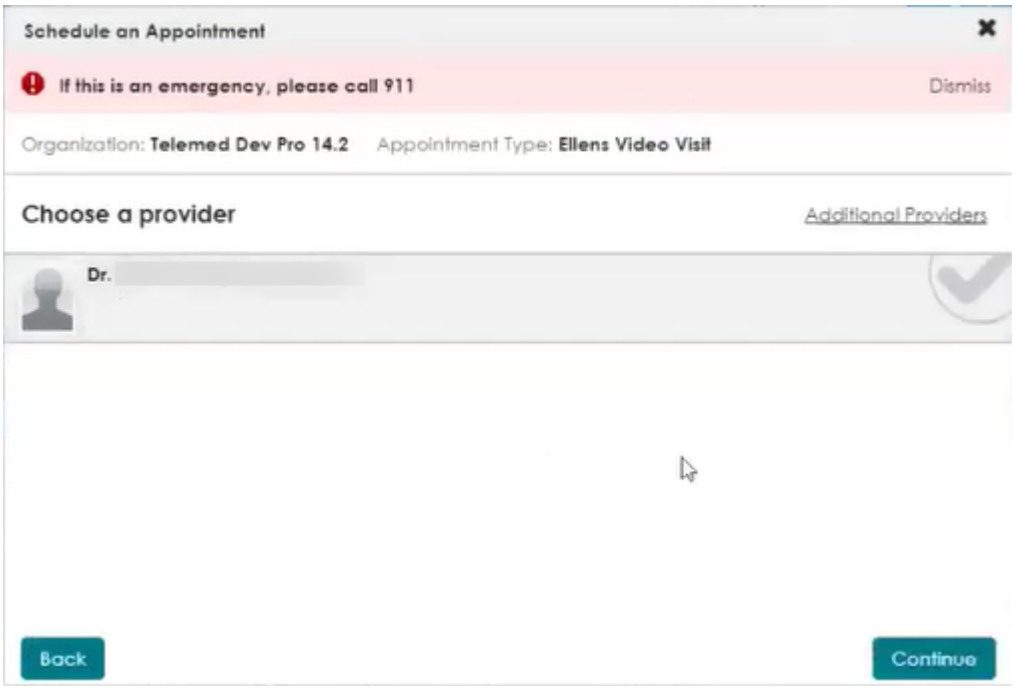
The appointment type is highlighted and a check mark is displayed on the appointment row.

4. Click **Continue**.
   Choose a provider is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Select a provider.

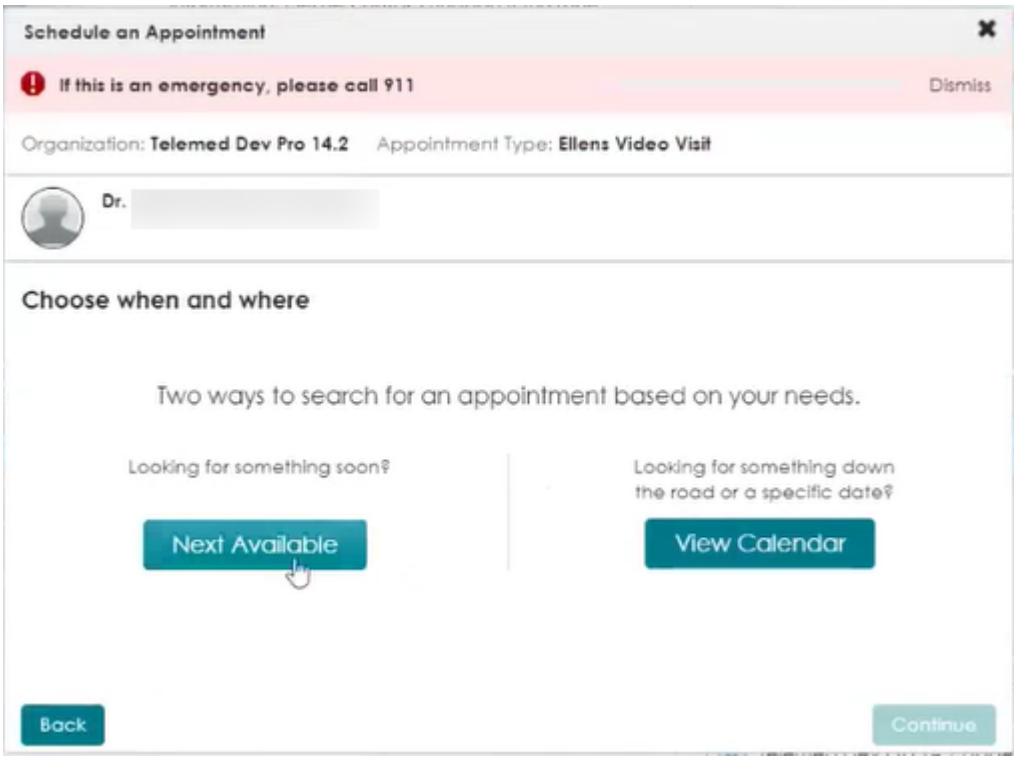


The provider is highlighted and a check mark is displayed in the provider row.

6. Click **Continue**.

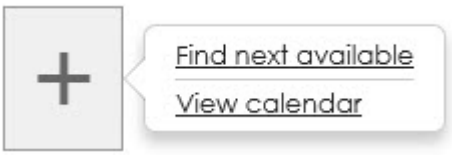
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Choose when and where is displayed.



7. Select an appointment date.

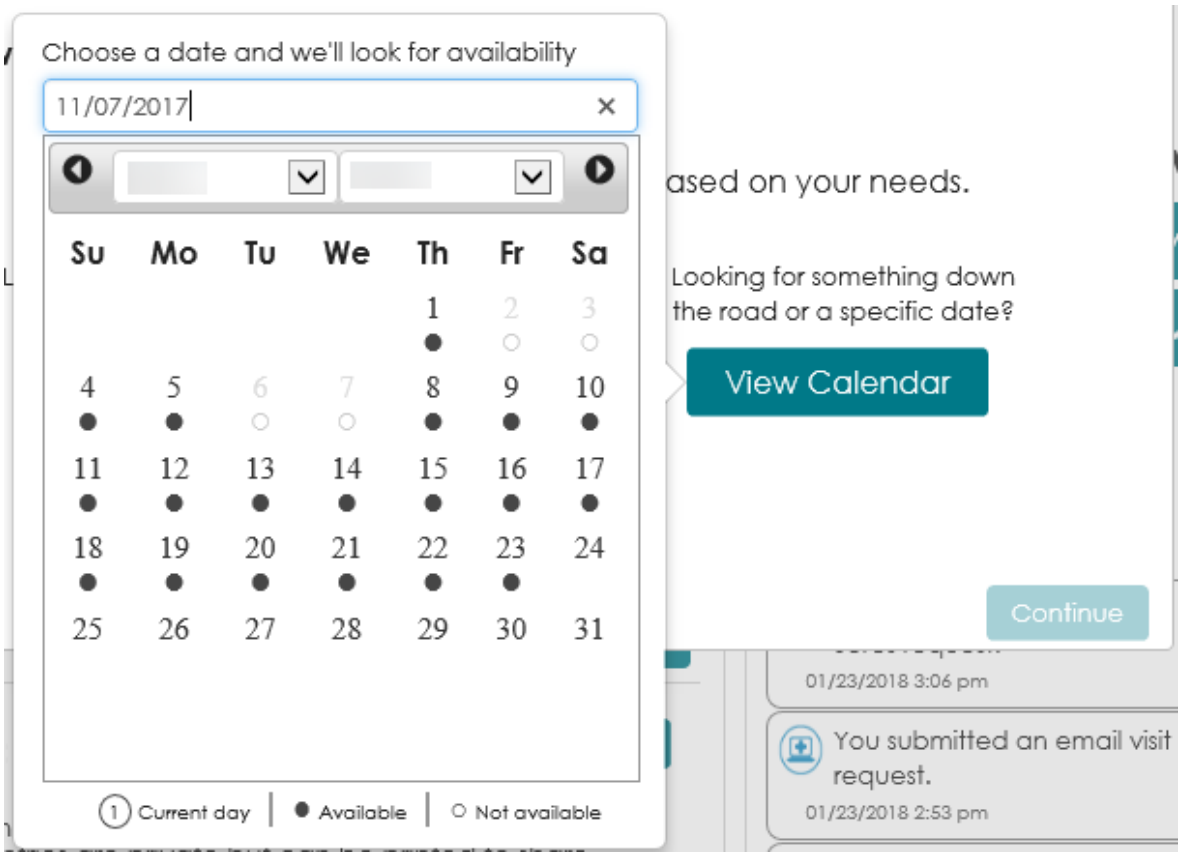
   > Click **Next Available**
   When you click **Next Available**, the next available calendar date is displayed in a single date box under **Choose when and where**. The appointments that are available on this date are also displayed.

   If you do not want the displayed date, click  and select **Find next available** or **View calendar** to select a date from the calendar.

   > Click **View Calendar**

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

When you click **View Calendar**, the calendar tool opens and you can select a date.

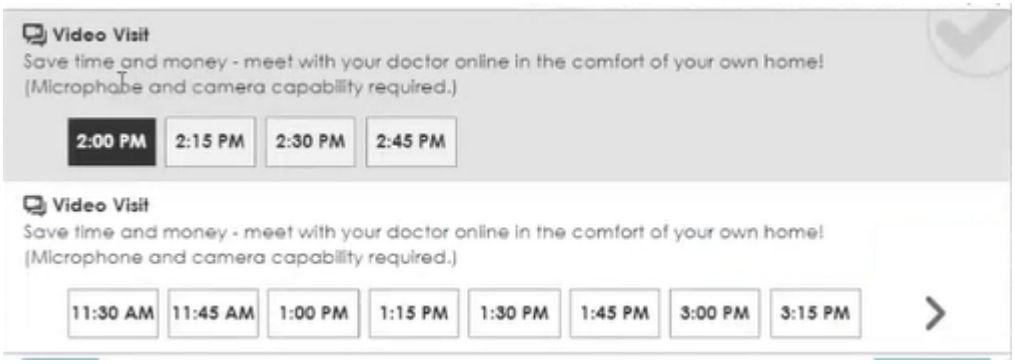


When you select a date, the date is displayed as a single date box under **Choose when and where**.

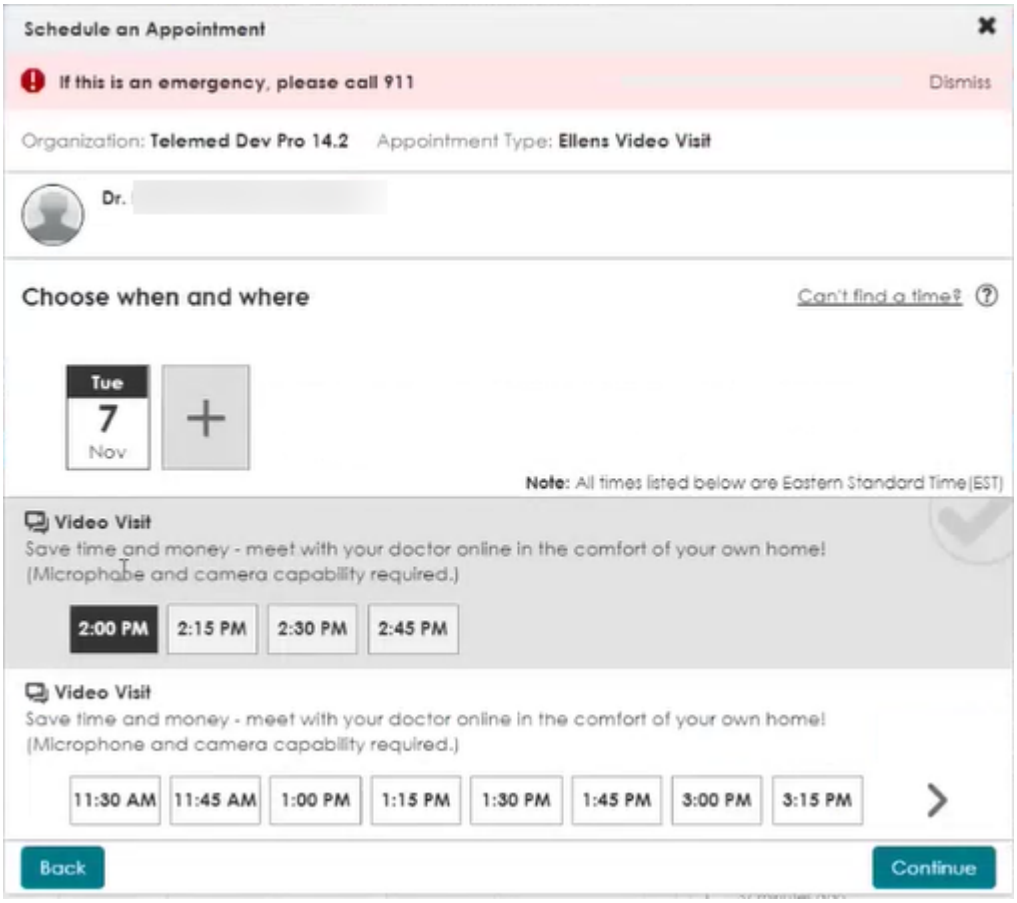
8. Select a Video Visit time slot.

   Several appointments might be listed, including face-to-face appointments and video visit appointments. When a video visit is available, **Video Visit** is listed as the location.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

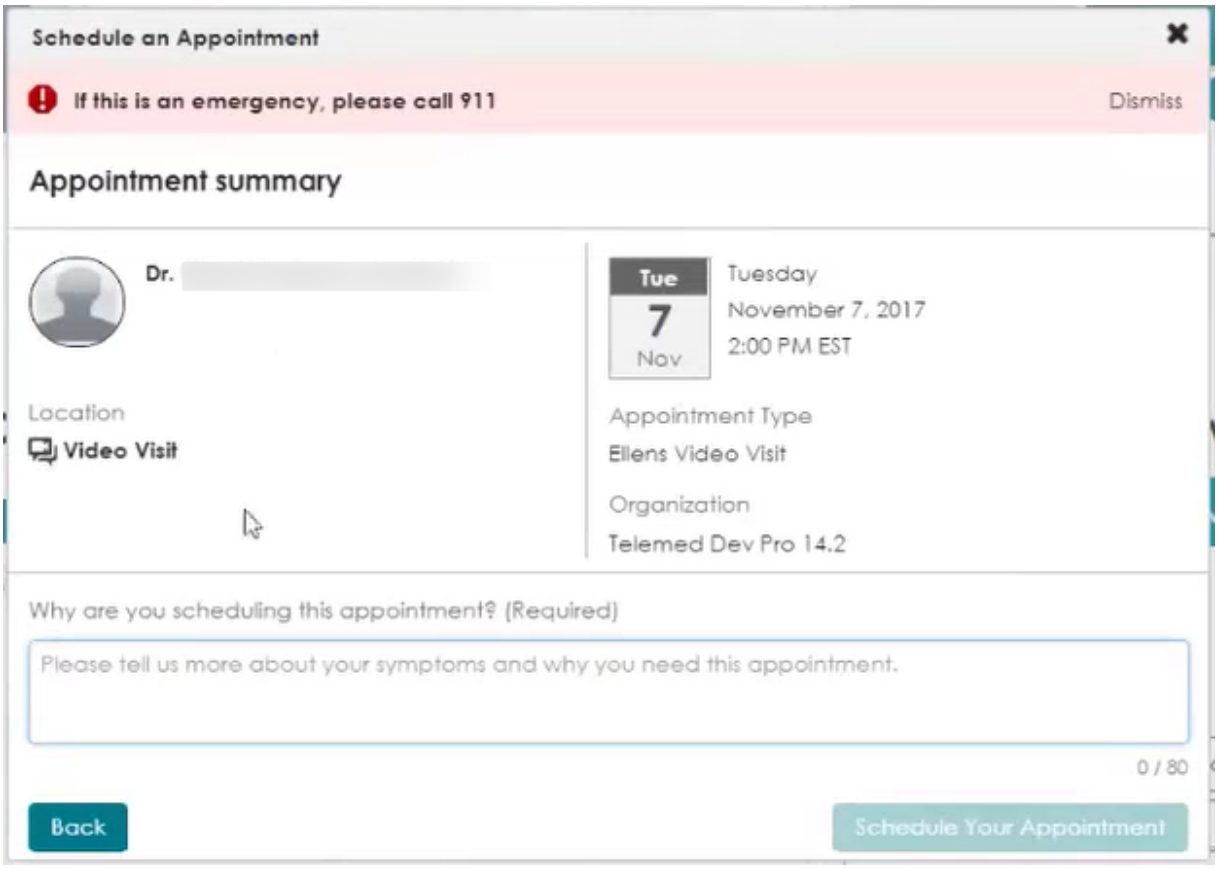


9. Click **Continue**.



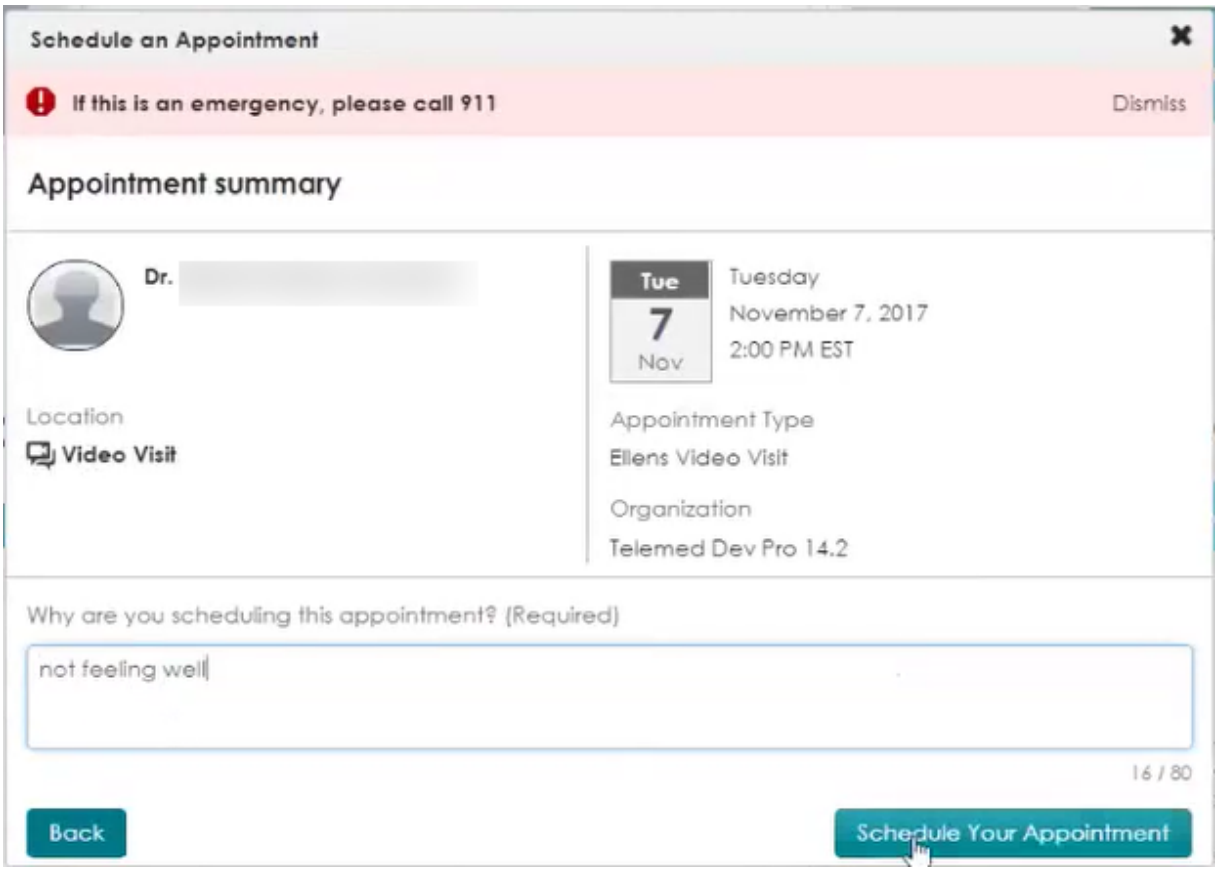
Appointment summary is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



10. Enter the reason for your appointment in **Why are you scheduling this appointment**.

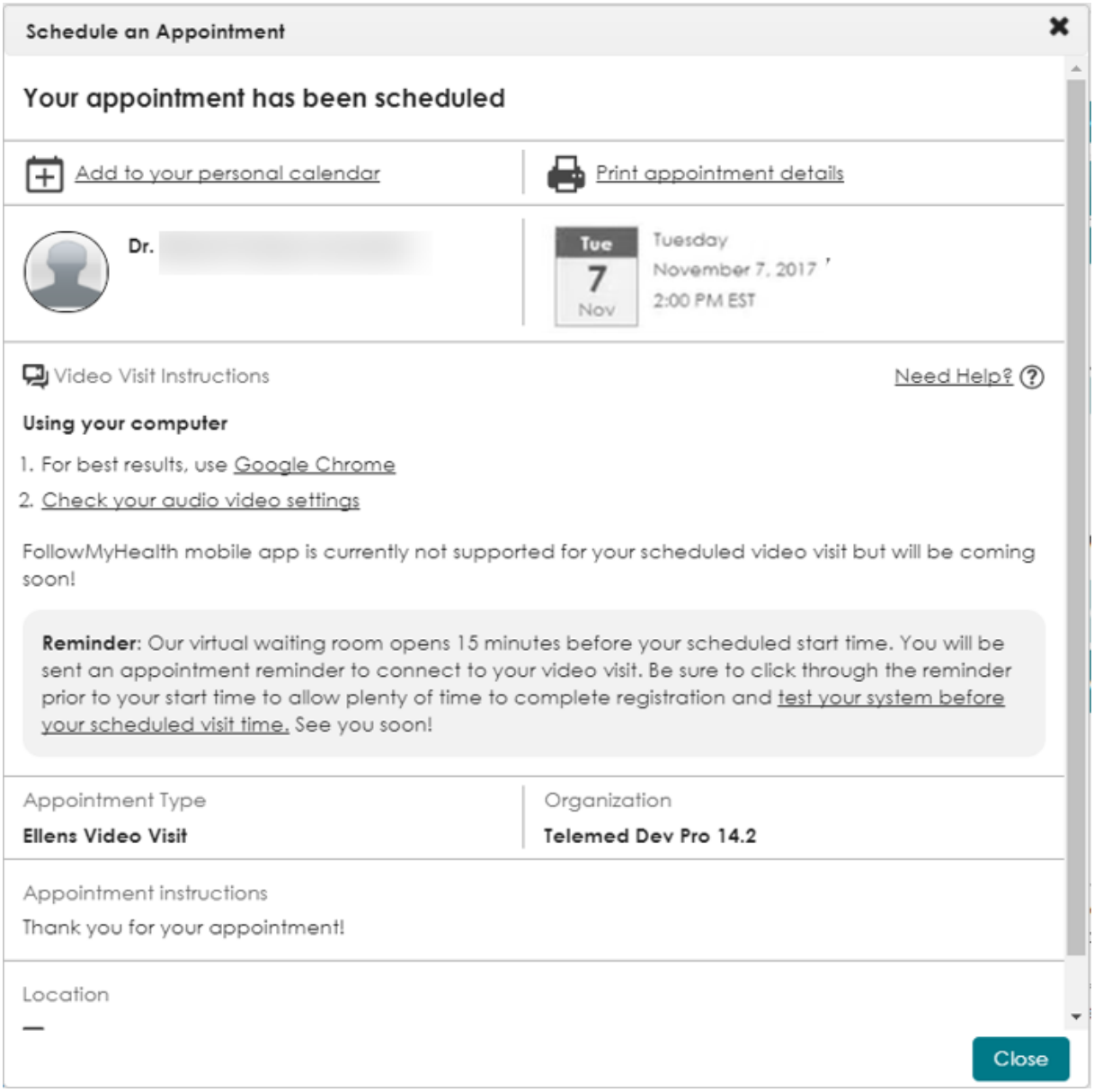
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



11. Click **Schedule Your Appointment**.

    Your appointment has been scheduled is displayed.

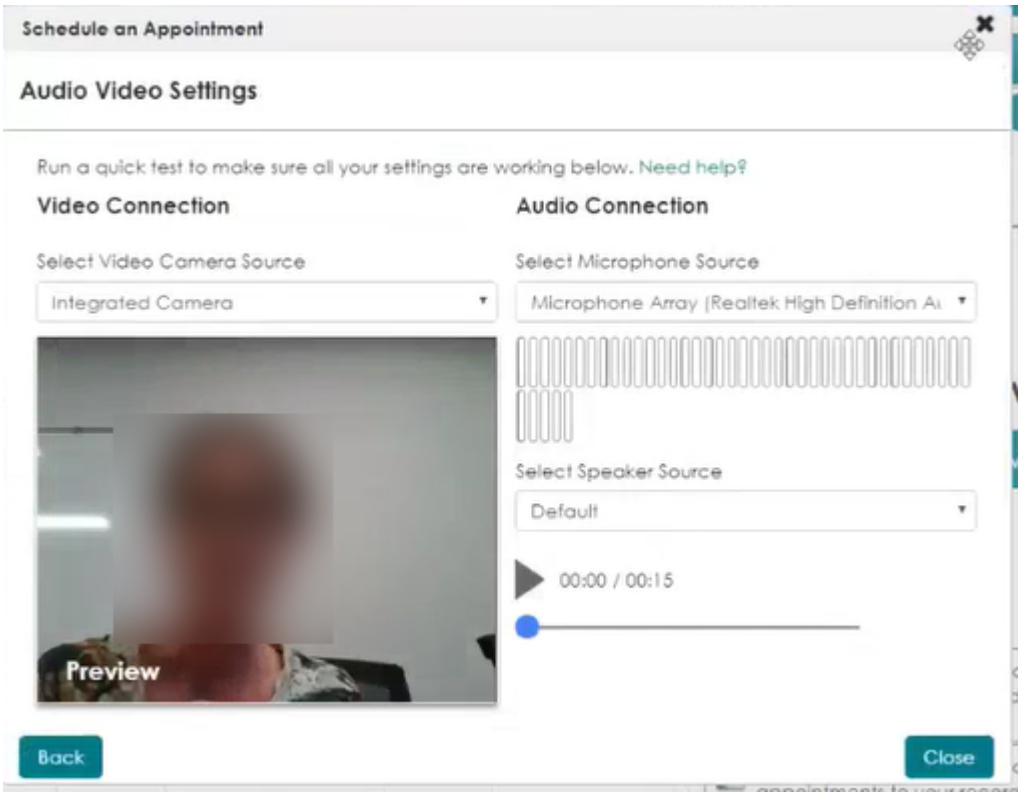
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



12. Save the appointment details to your personal calendar or print the information.
13. Click **test your system before your scheduled visit time** to test your audio and video settings.

    Audio Video Settings is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



Test the volume, ensure that your microphone is working, and ensure that your image is displayed on the video window.

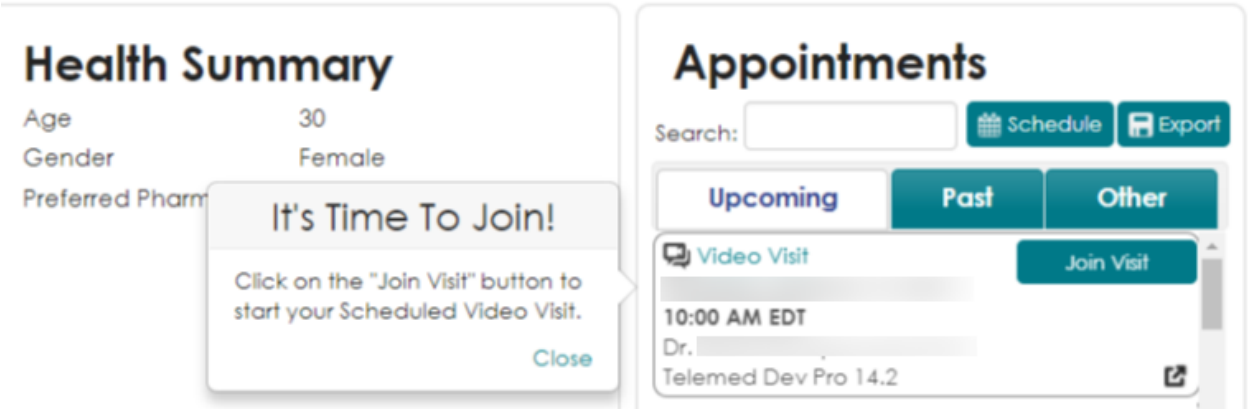
14 Click **Close**.

Results of this task

You have scheduled a video visit. An appointment confirmation is sent to your**Inbox**.

Fifteen minutes before your scheduled video visit start time, an appointment reminder email is sent to your **Inbox** and the **Join Visit** button is displayed next to your appointment in **Appointments** on the patient portal **Home** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



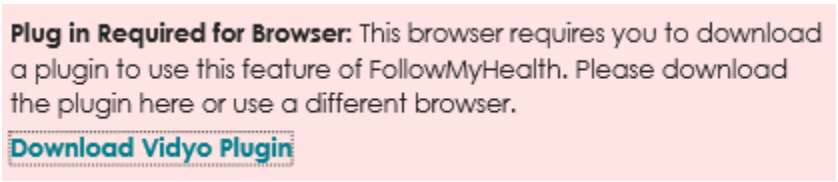
Start a scheduled video visit

Scheduled video visits are a convenient alternative to travelling to your healthcare organization for a visit with a provider. You can consult with a provider from a remote location using a desktop computer or tablet through your patient portal account.

Before you begin

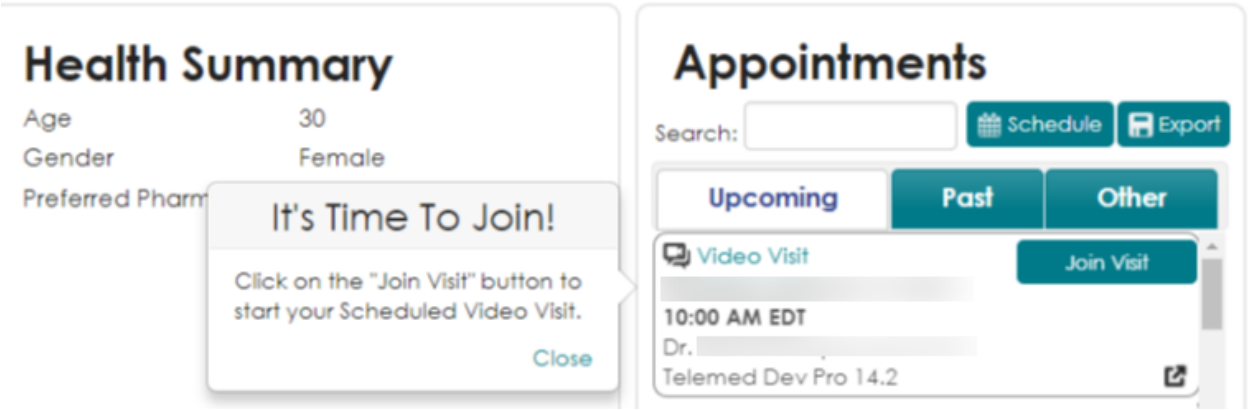
Ensure that you have the video client plug-in installed and are sharing your video and microphone peripherals. Read "Prerequisites for video visits" to ensure that you have the correct video client plug-in and microphone peripherals.

When you start the video visit and **Request a Video Visit** displays, the application automatically detects if you have the most current plug-in installed and supported browser. A message is displayed on the window if these requirements are missing. A link is available to download the latest plug-in. Or, you can use a browser that is supported by the plug-in.



Fifteen minutes before your scheduled video visit start time, an appointment reminder email is sent to your **Inbox** and the **Join Visit** button is displayed next to your appointment in **Appointments** on the patient portal **Home** tab. The notification is not sent if the appointment is pending cancellation.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



As you progress through a video visit, the **Action Center** on your patient portal **Home** tab displays notifications. Refer to "Action Center video visit notifications" to learn more about the notifications you see during the video visit workflow.

1. Open the patient portal.
2. From **Home > Appointments**, click **Join Visit**.

   The video visit window is displayed.
3. (Optional) To add attachments, click **Click here to add an attachment** in **Would you like to attach any files**.

   This step is an optional feature. The **Would you like to attach any files** box is not displayed unless your provider has the attachments option enabled.

   File Upload is displayed.
4. Attach files that are related to your condition that you want your provider to review.

   You can attach files in either of the following ways.

   > Drag and drop files from a folder on your computer into **File Upload**.
   > Click **Click here to attach a file** to browse and select files from a folder on your computer.

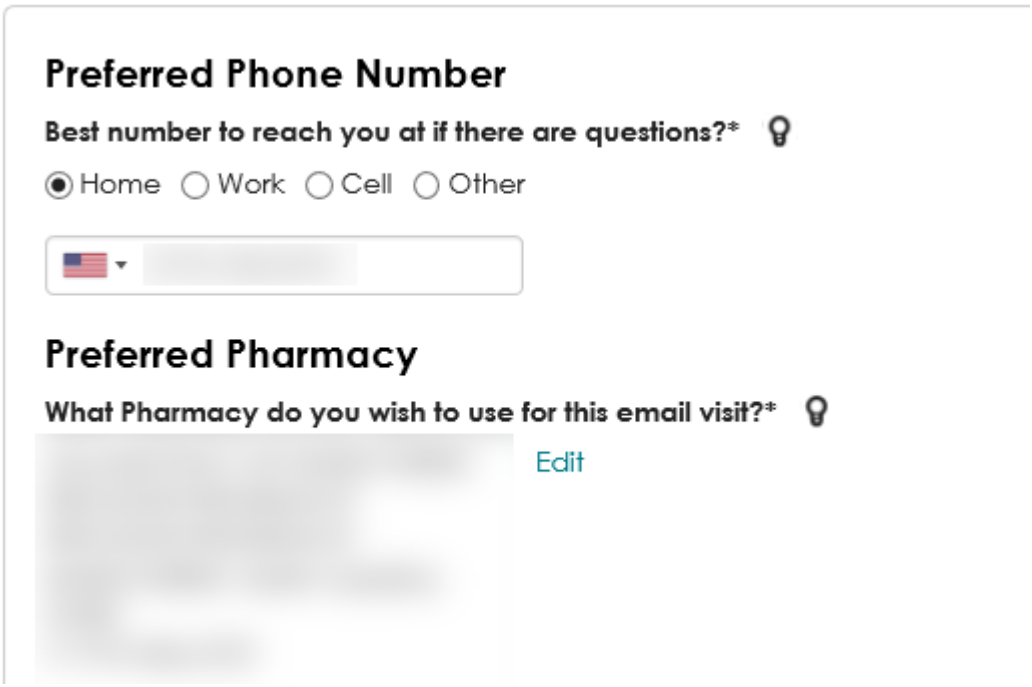
   You can add up to 5 files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

   After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

   Upon completing the video visit, the file is accessible to the provider through the video visit message template.
5. Click **Next**.

   Your demographic information is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



6. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.

   When the video visit is started and the video window is displayed, this information is displayed in the right pane. Ensure that you provide the preferred phone number and pharmacy so that your healthcare provider can contact you or send a prescription promptly after the video visit, if needed.

7. If you change your demographic information and want to share the change with all other organizations that you are connected with, select **Would you like to send this change to all of your connected organizations**.
8. Click **Go to Virtual Waiting Room**.

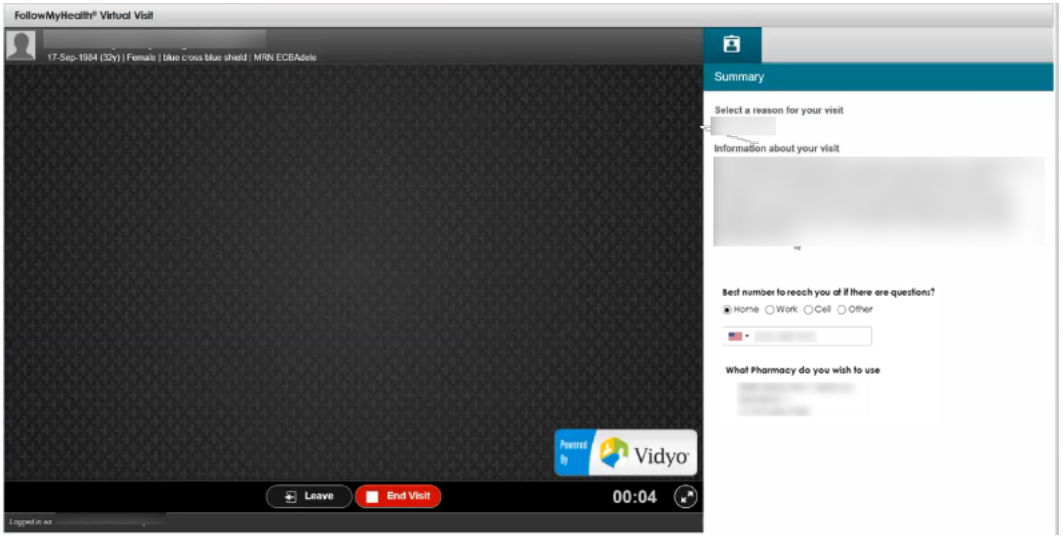
   Virtual Waiting Room is displayed.

   You are now in the virtual waiting room and you are an active patient in the provider's patient queue. The reason for your visit, the organization the visit is with, and the approximate time that your visit starts are shown.

   Alternatively, you change your audio and video settings from the **Virtual Waiting Room**. Click **Change Audio/Video Settings** to open **Virtual Waiting Room Audio Video Settings**.

   The reason for your visit and additional information that you entered during the video visit process are displayed in the right pane under **Summary**. Your preferred phone number and pharmacy are also displayed in the right pane.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

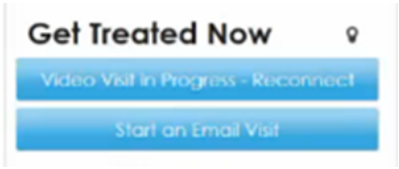


9. (Optional) Leave the video session.

   If you want to leave the visit during the session, you can rejoin the same session.

   Click **Leave** to close video window. The video session closes.

   If you want to return, click **Video Visit in Progress – Reconnect** on the **Home** tab under **Get Treated Now** and the session reconnects.



   The video screen reopens and you can continue with the video visit.

10. Click **End** to end the on-demand video visit.
11. (Optional) Plan your follow-up visit and if you requested that the provider send you a visit summary through email, check your **Inbox** tab to view the visit summary.

Results of this task

You have completed a scheduled video visit with a provider and reviewed your visit summary.

Action Center video visit notifications

As you progress through a video visit, the **Action Center** on your patient portal **Home** tab displays notifications.

The notifications match the status of where you are at in the video visit workflow.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Action Center notifications are available for the main user, as well as dependents, so that you can click the notification to launch the video visit without manually switching accounts.

The following changes occur in **Action Center** as you progress through the video visit.

Check-In

"Video Visit - Check-In" is displayed in **Action Center**.

When a Scheduled Video Visit is ready for check-in (15 minutes before the appointment start time), this **Action Center** item is displayed. Click the **Action Center** item to complete the check-in workflow. The notification is not sent if the appointment is pending cancellation.

Waiting for provider

"Video Visit - Waiting" is displayed in **Action Center**.

When a provider has not yet joined the video visit, this **Action Center** item is displayed.

In Progress, video not started

"Video Visit - Ready" is displayed in **Action Center**.

Click the text to launch the video session dialog.

In Progress, video started

"Video Visit - In Progress" is displayed in **Action Center**.
Click the text to launch the video session dialog.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 9

Email visits

Email visits enable you to have a consultation with your provider through secure email messaging. The email visit workflow includes answering questions to qualify your symptoms, identify the reason for the email visit, and if needed, get a prescription from your provider.

The following are email visit requirements and features.

- You must have a connection with a provider that supports the email visit feature.
- If your provider supports attachments, you can attach images to the email visit.
- If your provider has the Email Visit feature, you can start an email visit from your patient patient portal account in either of the following ways:
  - From **My Account > Connections > With Providers and Healthcare Organizations > *Provider* > What do you want to do > Request an Email Visit**
  - On the **Home** tab from **Get Treated Now > Start an Email Visit**
- Your symptoms must be qualified during the email visit. If your symptoms are too severe, the email visit process stops and you are asked to see the provider at his or her office, or seek emergency medical attention.
- A flat fee might be charged by your provider and is paid when requesting your email visit.
- All responses to your email visit are sent to the **Inbox** tab in the patient portal.

> **Note:** Internet Explorer v8 is not currently supported for email visit. You must have an Internet Explorer version later than v8.

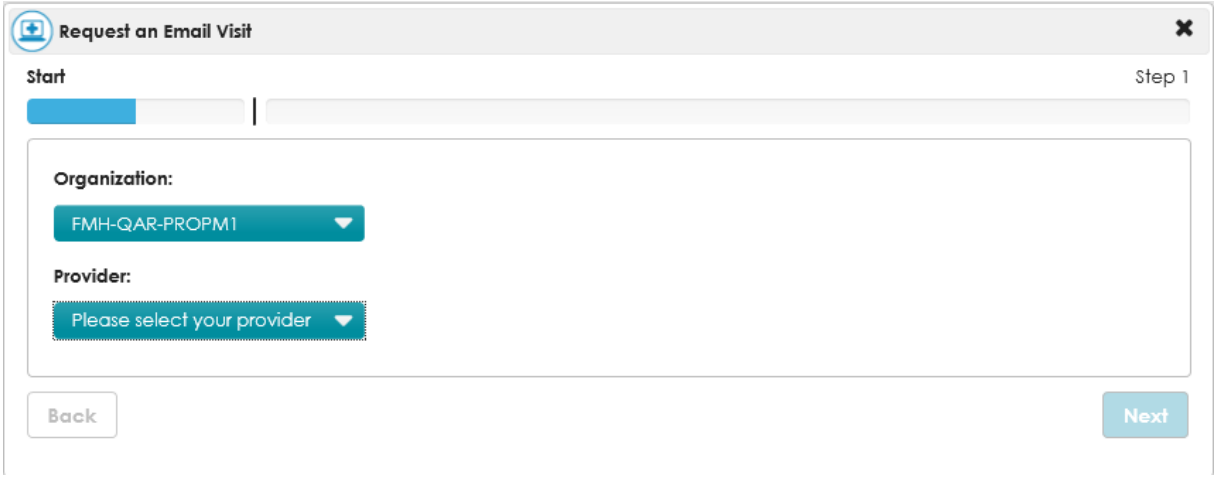
Request an Email Visit from the Home tab

You can request an email visit from the **Get Treated Now** section on your patient portal **Home** tab. If the payment feature is enabled for your provider, you can also make a payment during this process.

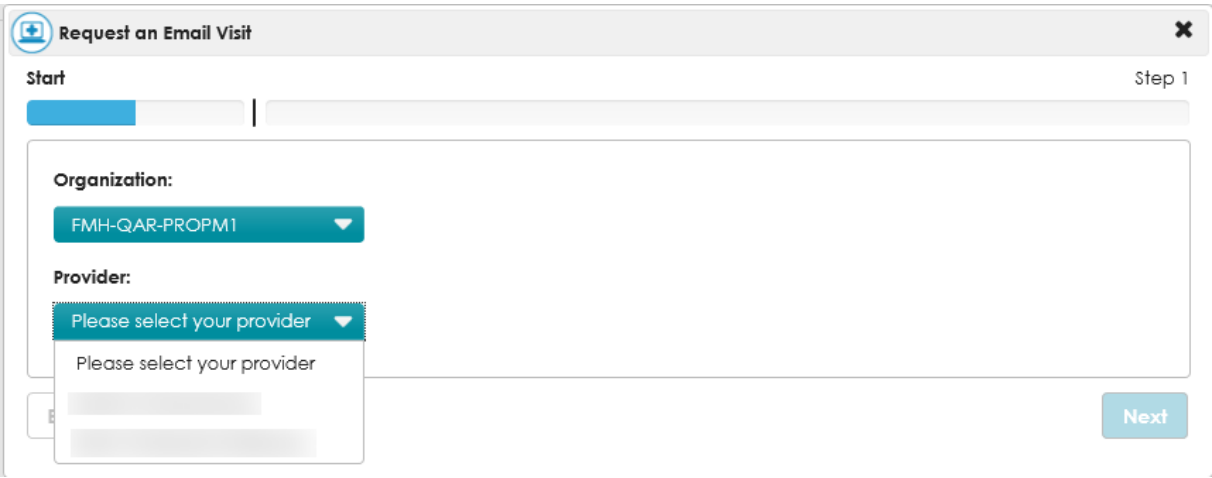
1. Sign in to the patient portal.
2. Go to **Get Treated Now** and click **Start an Email Visit**.

   Request an Email Visit - Start is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



3. From **Provider**, select who you want to have an email visit with.

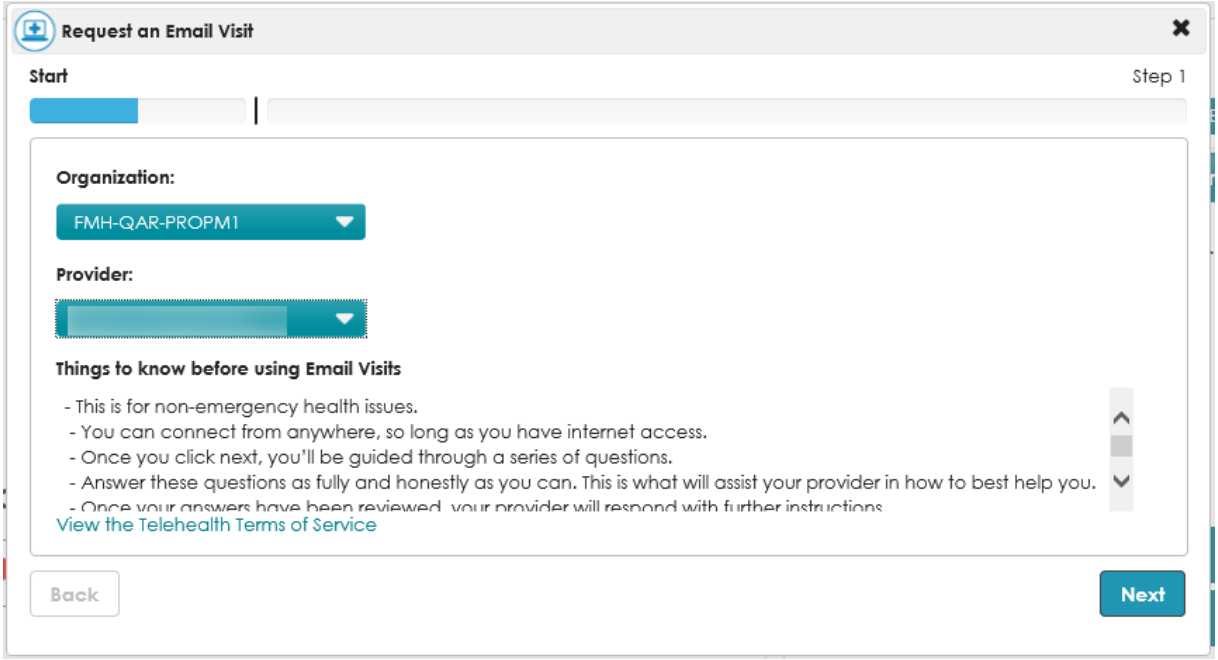


> **Note:** If your provider is not listed, he or she does not have the Email Visit feature enabled.

4. Click **Next**.

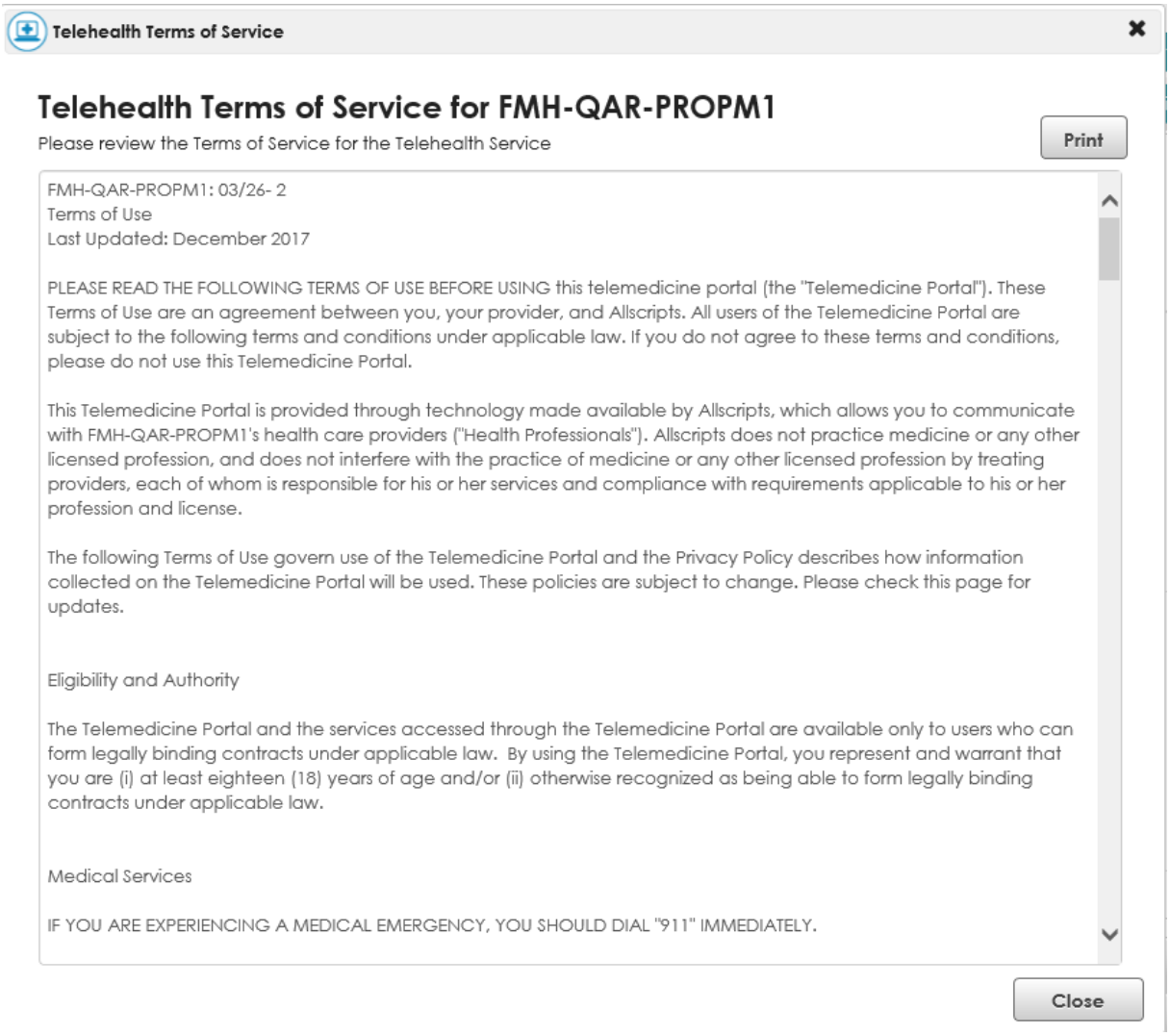
   Things to know before using Email Visits and **View the Telehealth Terms of Service** are displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



5. Read **Things to know before using Email Visits**.
   This is important information that your provider wants you know before you start.
6. Click **View the Telehealth Terms of Service** to read the terms of service.
   Telehealth Terms of Service opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



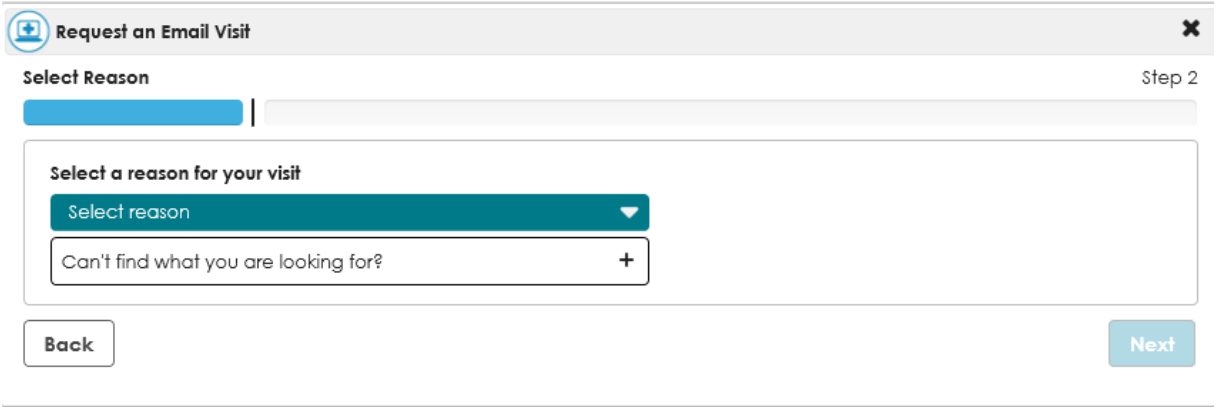
Click **Print** if you want a paper copy of the terms of service.

Click **Close** after you have read the terms of service.

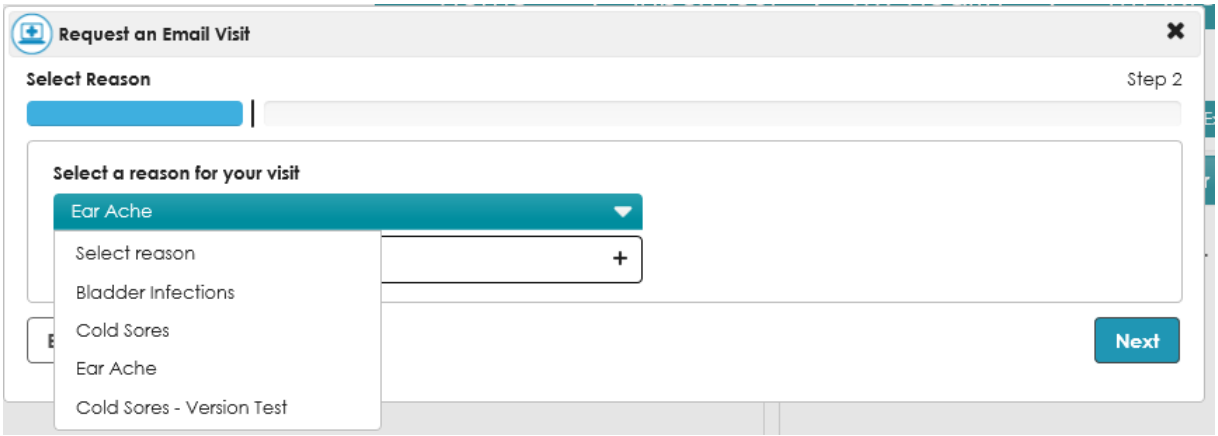
7. Click **Next**.

   Select a reason for your visit is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



8. From **Select a reason for your visit**, click **Select reason** to display a list of issues.

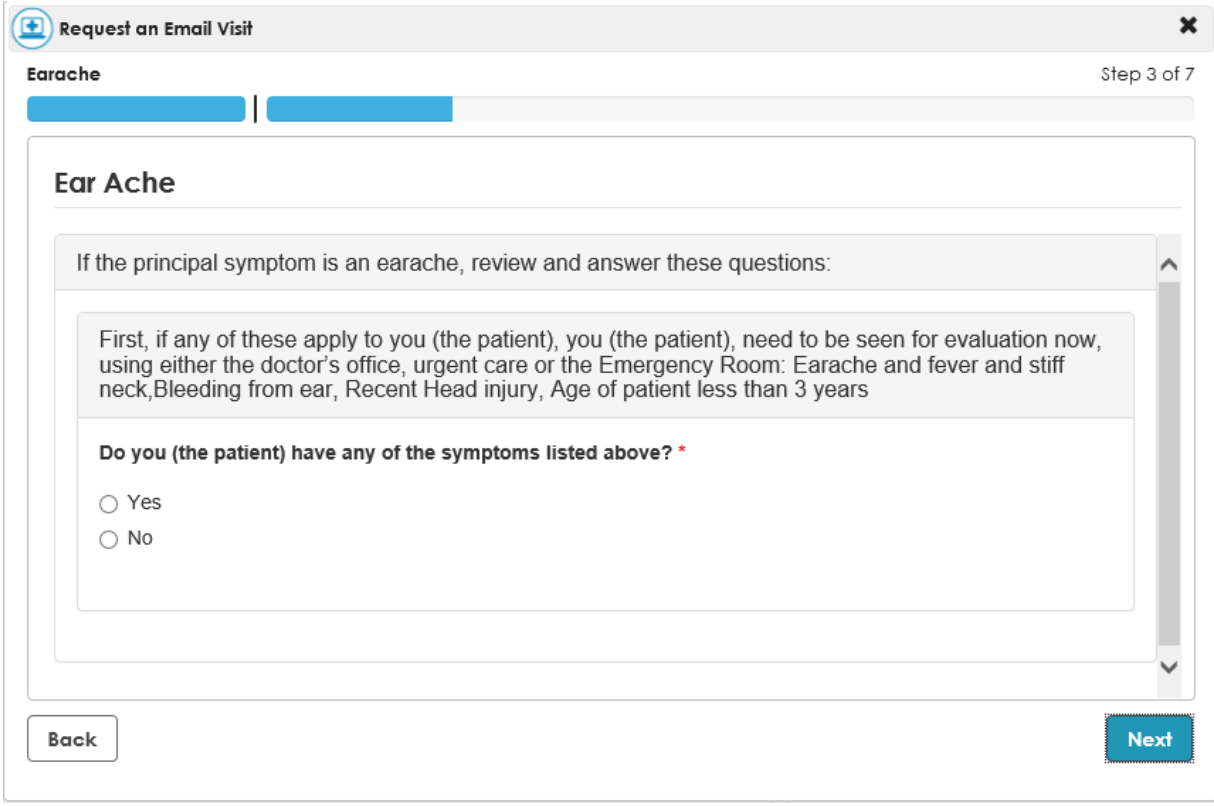


If you do not see the symptoms that you are experiencing, you can click **Can't find what you are looking for > Make an In-Person Appointment**. The Email Visit workflow ends and **Schedule and Appointment** is displayed.

9. Select the reason and click **Next**.

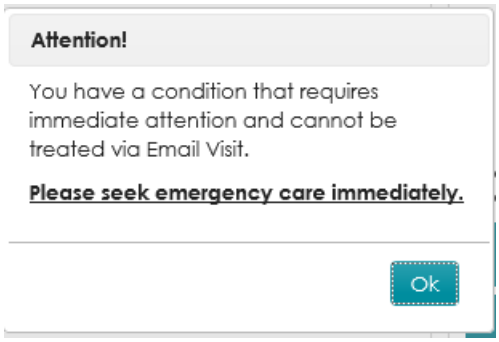
The qualification process begins. The reason for the Email Visit is displayed at the top of the window.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



10. Read the symptoms and select **Y** or **N**.

> If you are experiencing any of the conditions or symptoms listed, click **Y** (yes).
A message is displayed that confirms that you have a symptom that is outside the guidelines for treatment through an email visit.

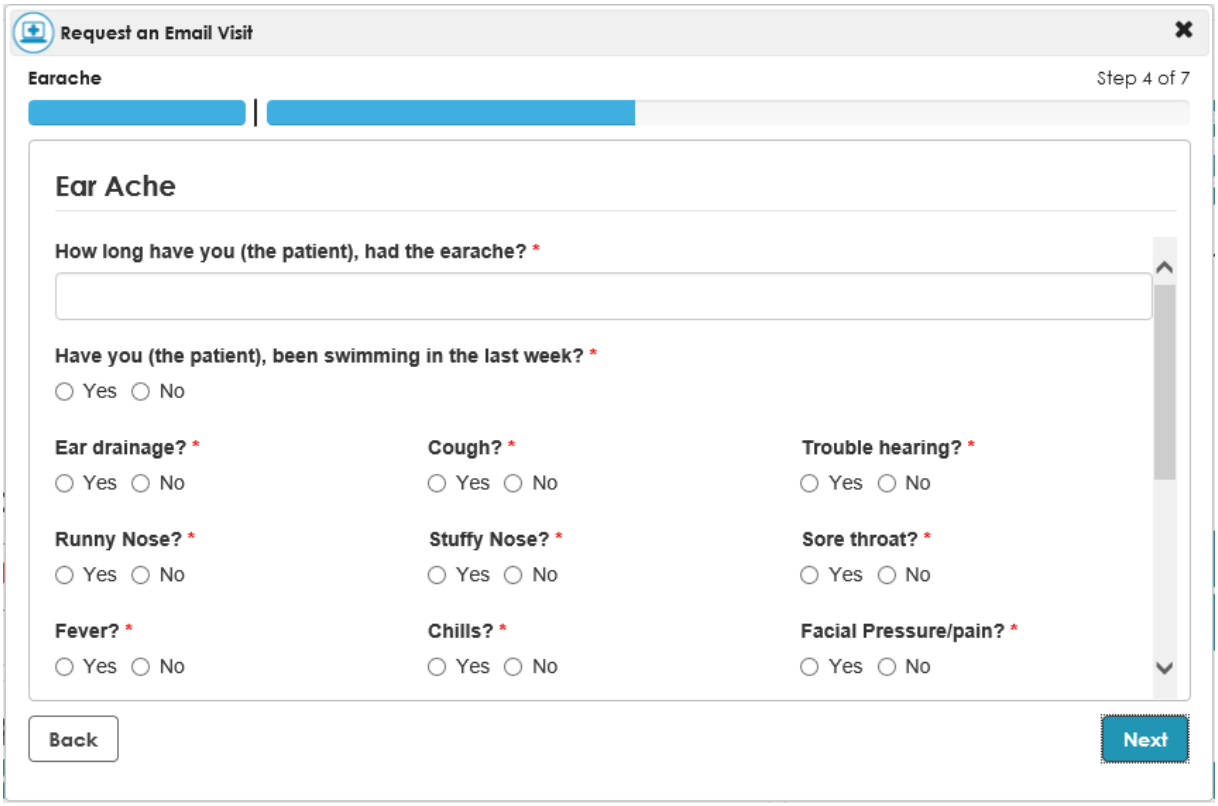


Click **OK**. The email visit workflow ends.

> If you are not experiencing any of the symptoms listed, click **N** (no) and click **Next**.

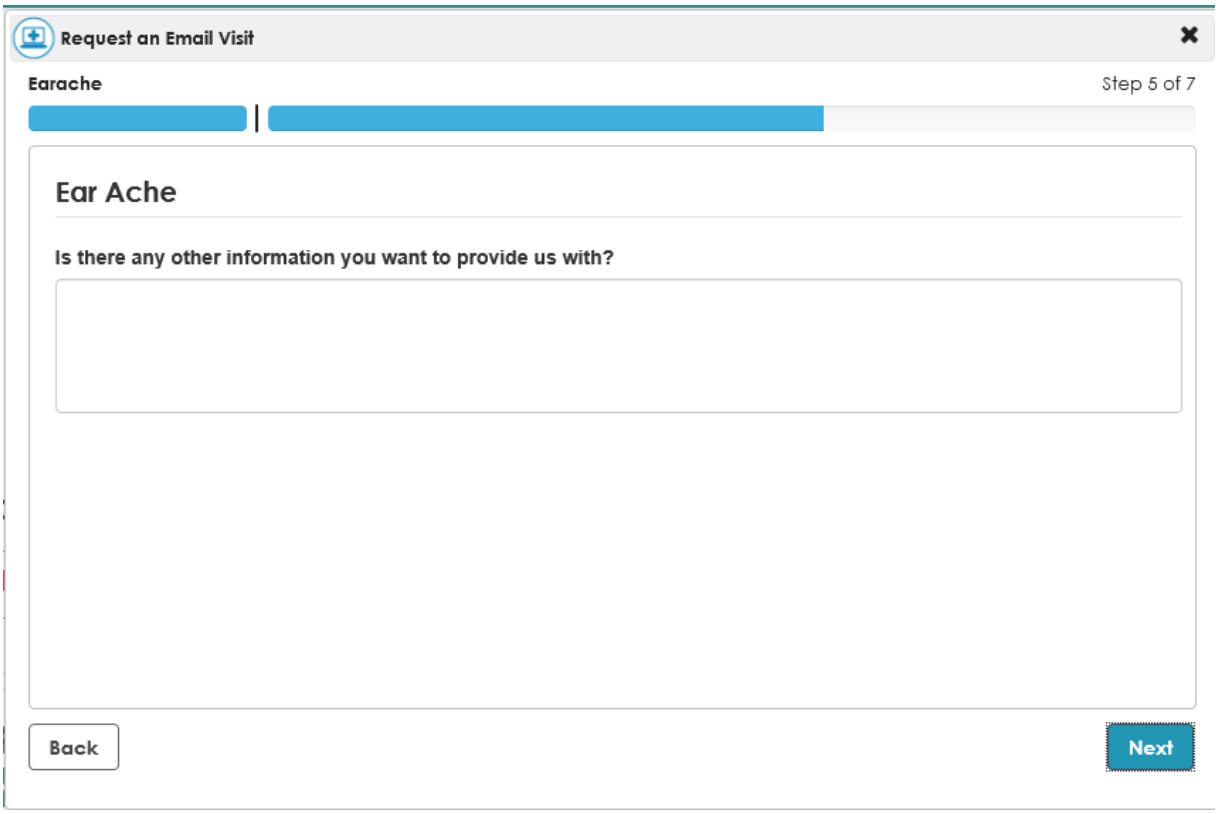
Symptom questions specific to your issue are displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



11. Answer the questions about your symptoms and click **Next**.
    Other Information is displayed.

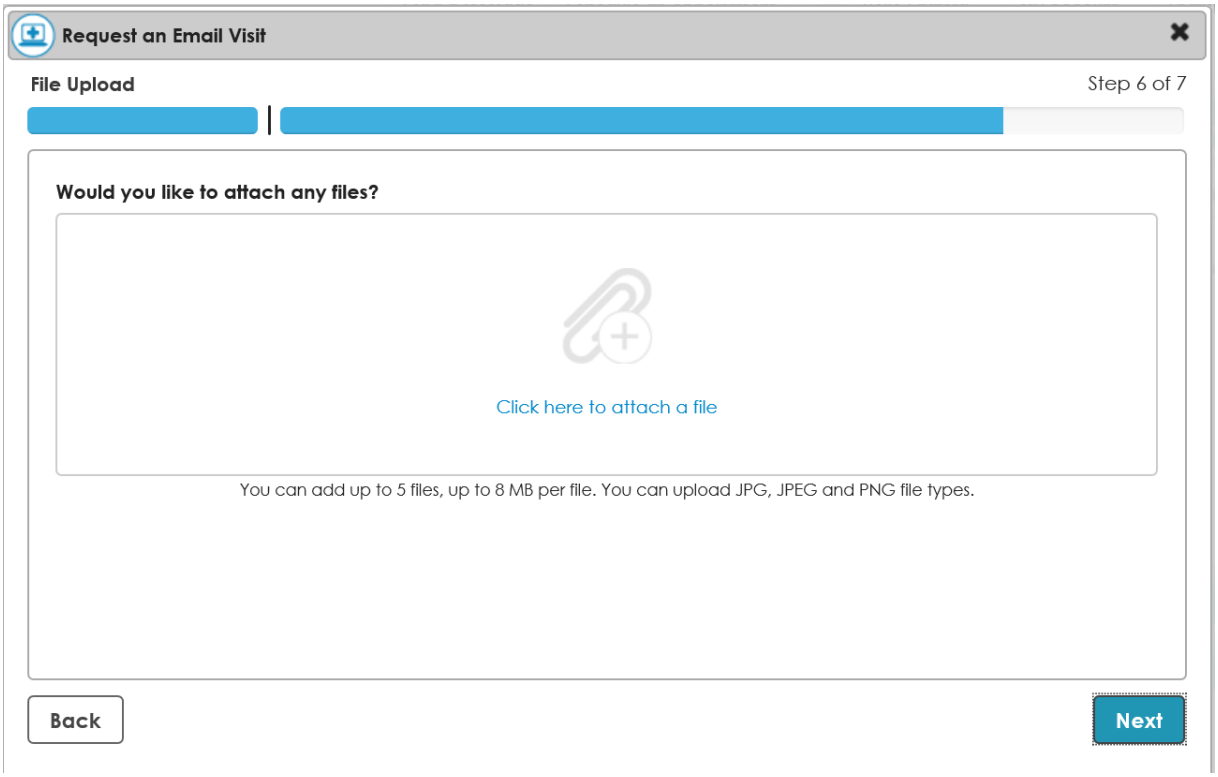
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



12. Enter additional information in the box that you want your provider to know and click **Next**. **File Upload** is displayed.

> **Note:** This step is an optional feature. The **File Load** window is not displayed unless your provider has the attachments option enabled.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



13. Attach files that are related to your condition that you want your provider to review.

    You can attach files in either of the following ways.

    > Drag and drop files from a folder on your computer into **File Upload**.
    > Click **Click here to attach a file** to browse and select files from a folder on your computer.

    You can add up to 5 files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

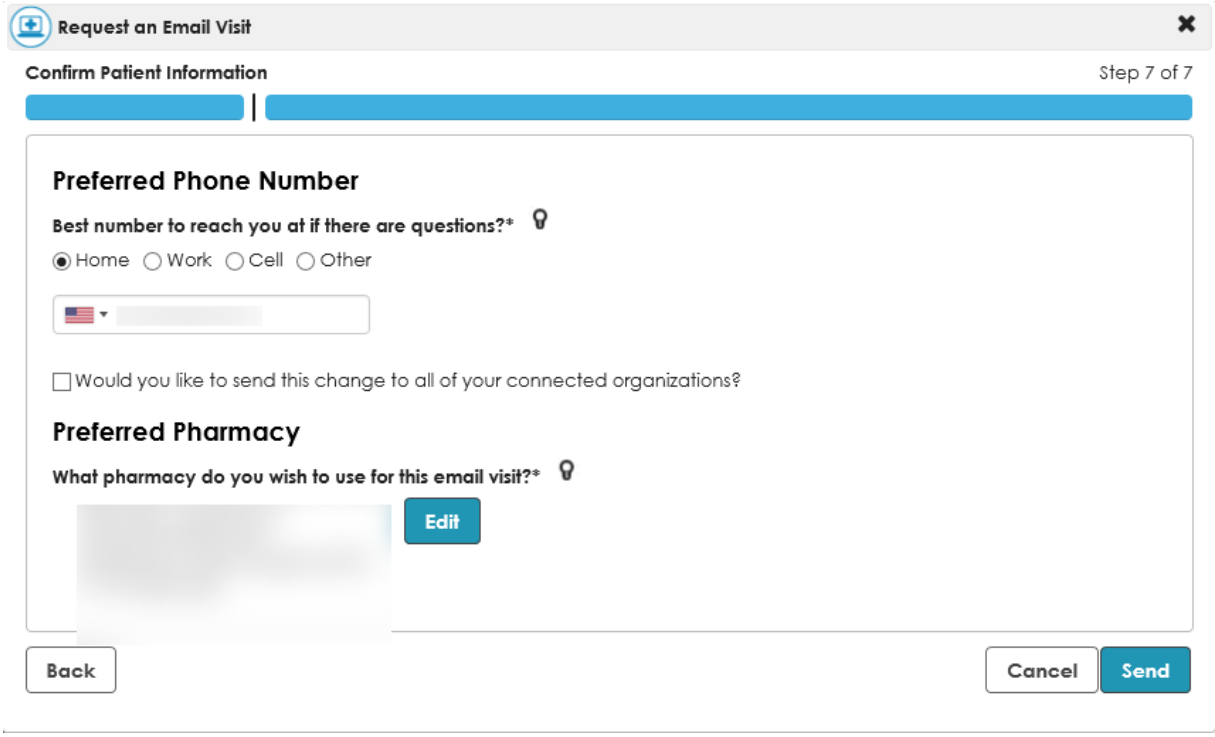
    After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

    Upon completing the email visit, the file is accessible to the provider through the email visit message template.

14. Click **Next**.

    Confirm Patient Information is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

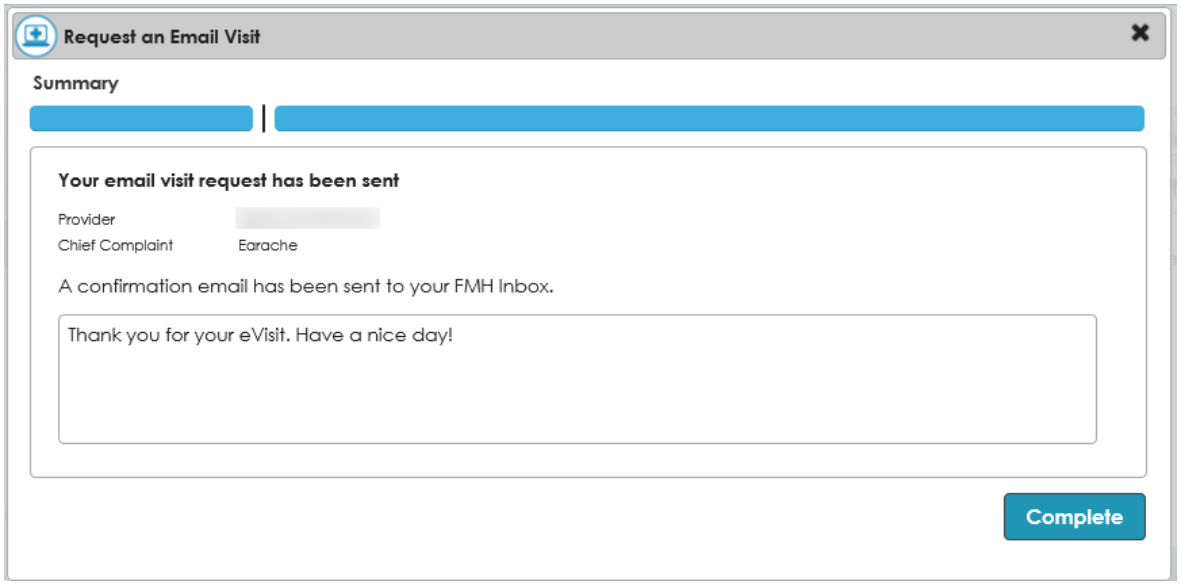


15. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.
16. Click **Next** or **Send**, depending on the following scenarios.

    Next is displayed in **Confirm Patient Information** if your provider has enabled the email visit payment feature. **Send** is displayed instead of **Next** if the provider has not enabled the email visit payment feature.

    > **Your provider does not have the payment feature enabled and you cannot make a payment at this time.** Click **Send**.
    > **Summary** is displayed.

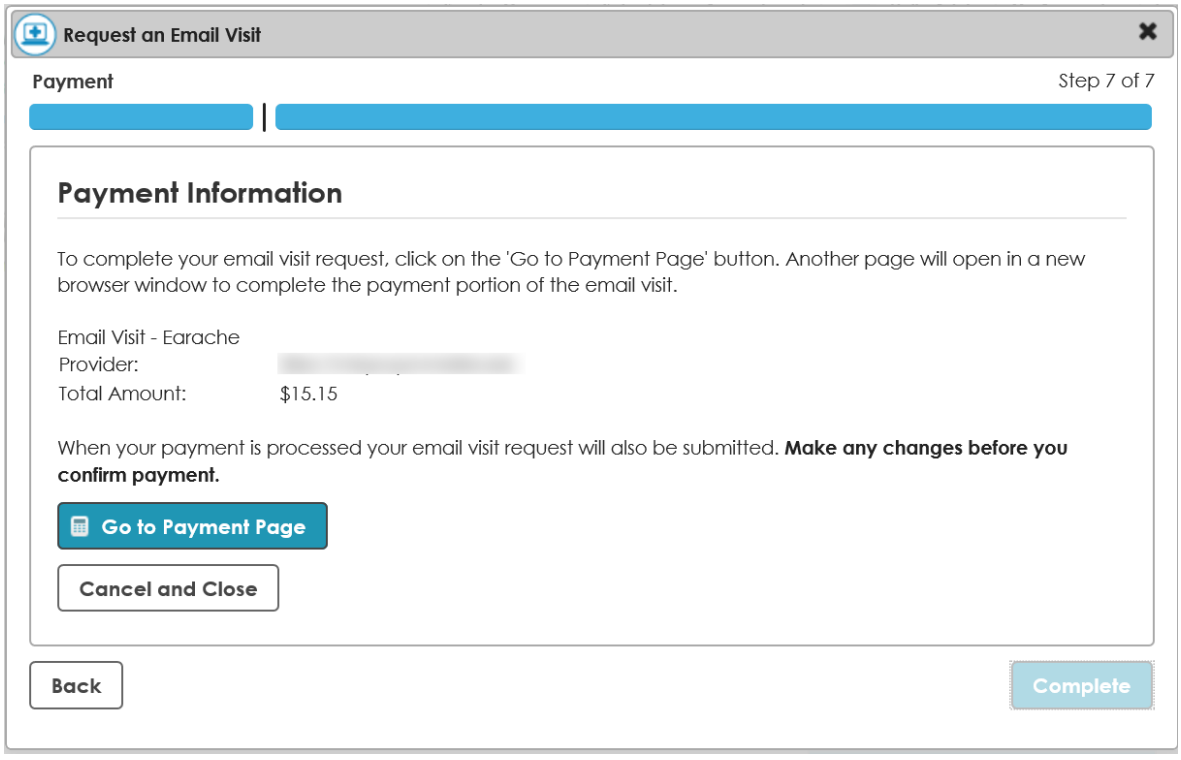
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



A message is displayed that indicates that your Email Visit is submitted to your provider.

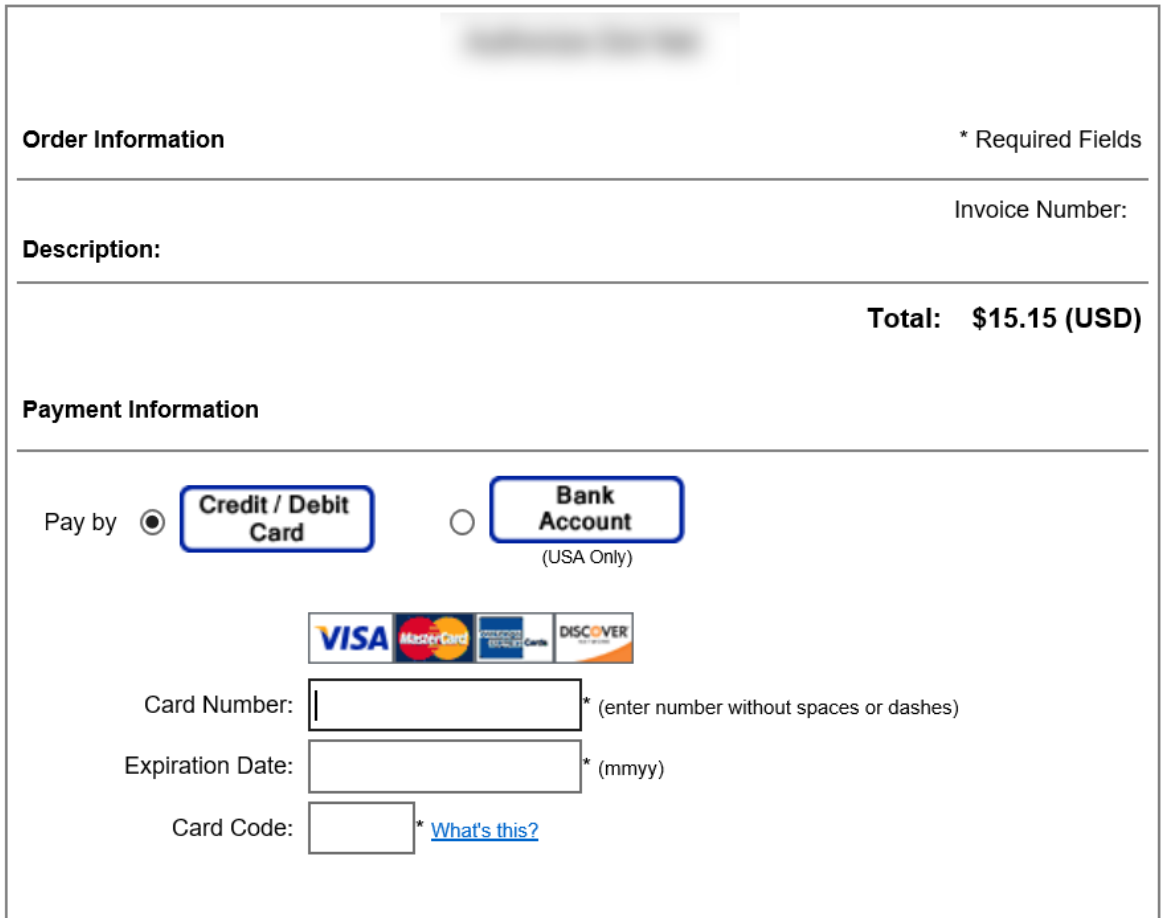
Go to step 17 to finish the Email Visit.

> **Your provider has the payment feature enabled and you can now make a payment.** Click **Next**.
Payment is displayed.



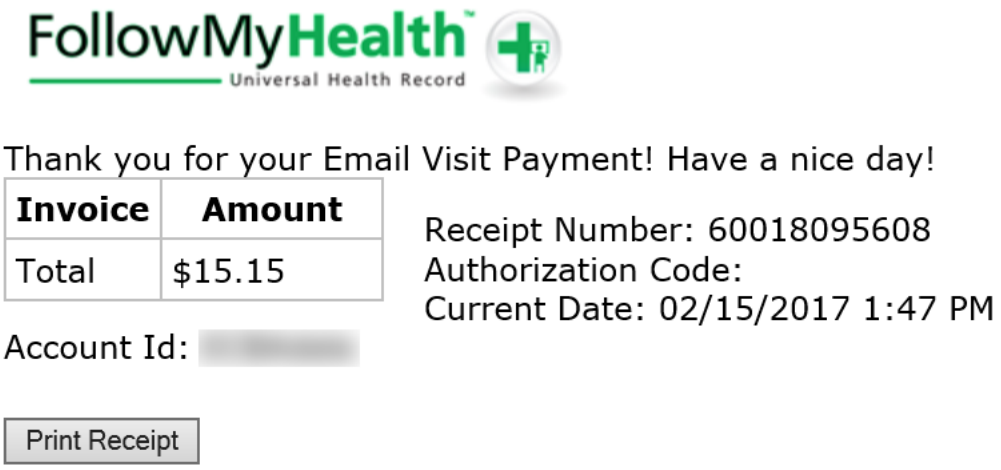
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Click **Go to Payment Page**. The payment page is displayed.

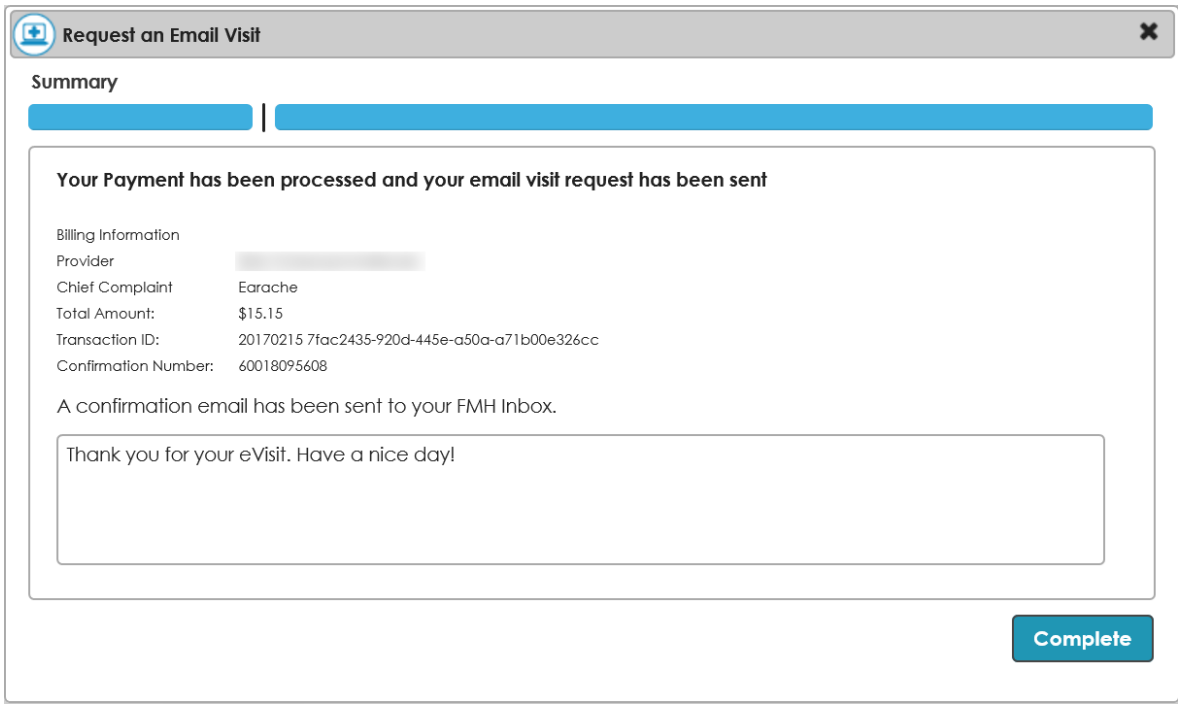


Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



After your payment is processed, **Summary** is displayed.



Go to step 17 to finish the email visit.

17. Click **Complete**.

    The email visit workflow closes.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

Your Email Visit request is sent to the provider. You can view the sent message from your **Sent** folder in the **Inbox** tab. The message content is a summary of the email visit request.

The provider receives the email visit request, reviews your symptoms, creates a care plan, and responds to the email visit request. The message is sent to your **Inbox** tab and you can retrieve your care plan. Your health record is also updated with the email visit information.

A receipt is also sent through an email message to your **Inbox** tab.

Request an email visit from Connections

You can request an email visit from the provider connections list on your patient portal **Connections** tab. If the payment feature is enabled for your provider, you can also make a payment during this process.

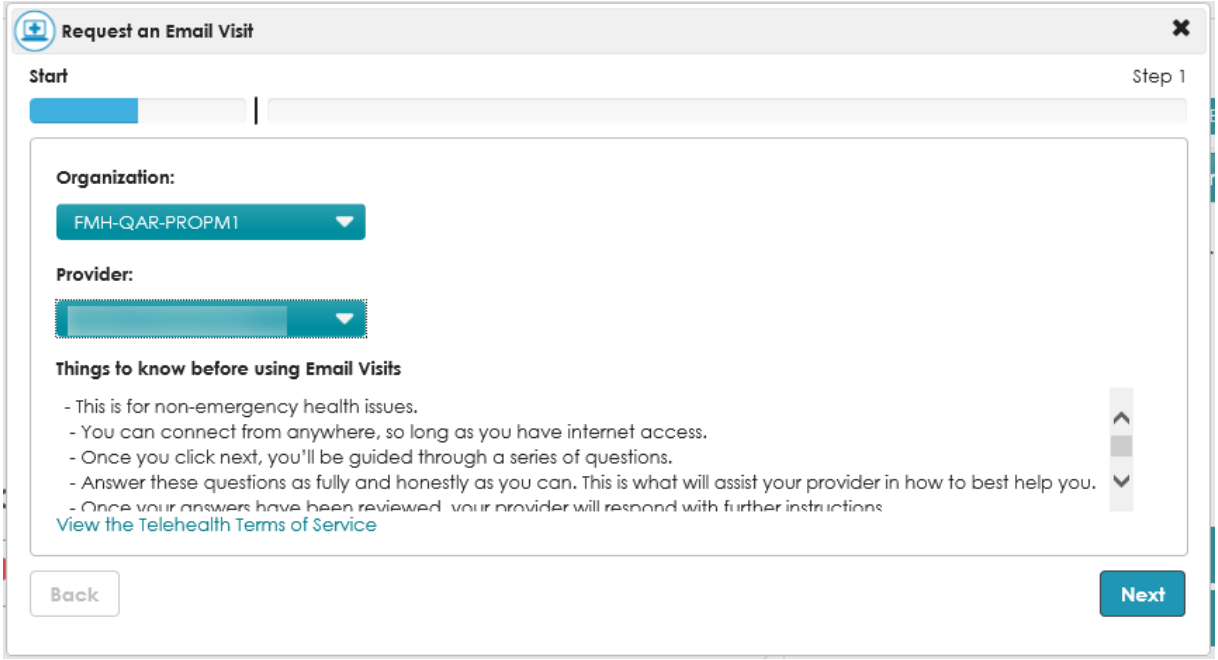
1. Sign in to the patient portal.
2. From the static toolbar, click **My Account > Connections**.
3. **Connections** opens.
4. Expand **With Providers and Healthcare Organizations**.

   Providers who you are connected to are displayed.
5. From a provider, click **What do you want to do > Request an Email Visit**.

   > **Note:** If your provider does not have **Request an Email Visit** listed, they do not have the Email Visit feature enabled.

   Request an Email Visit - Start opens.

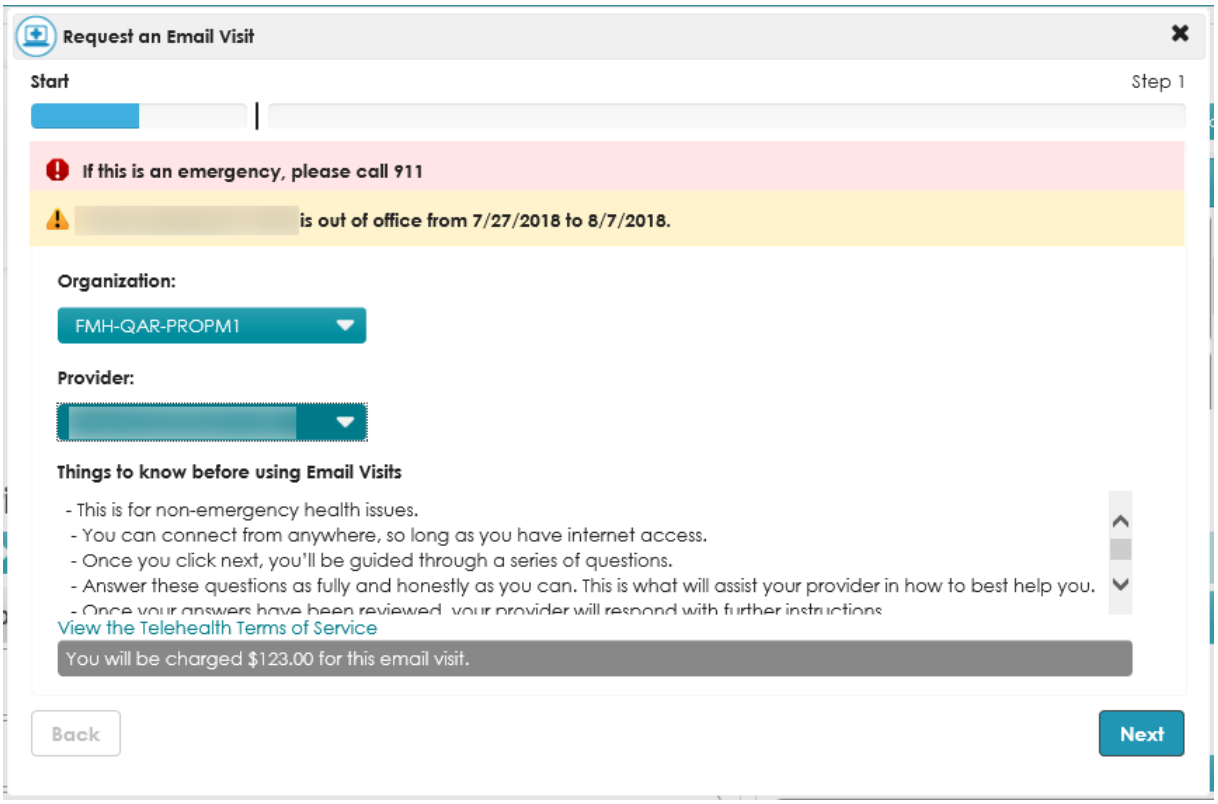
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



The provider name is displayed in **Provider**.

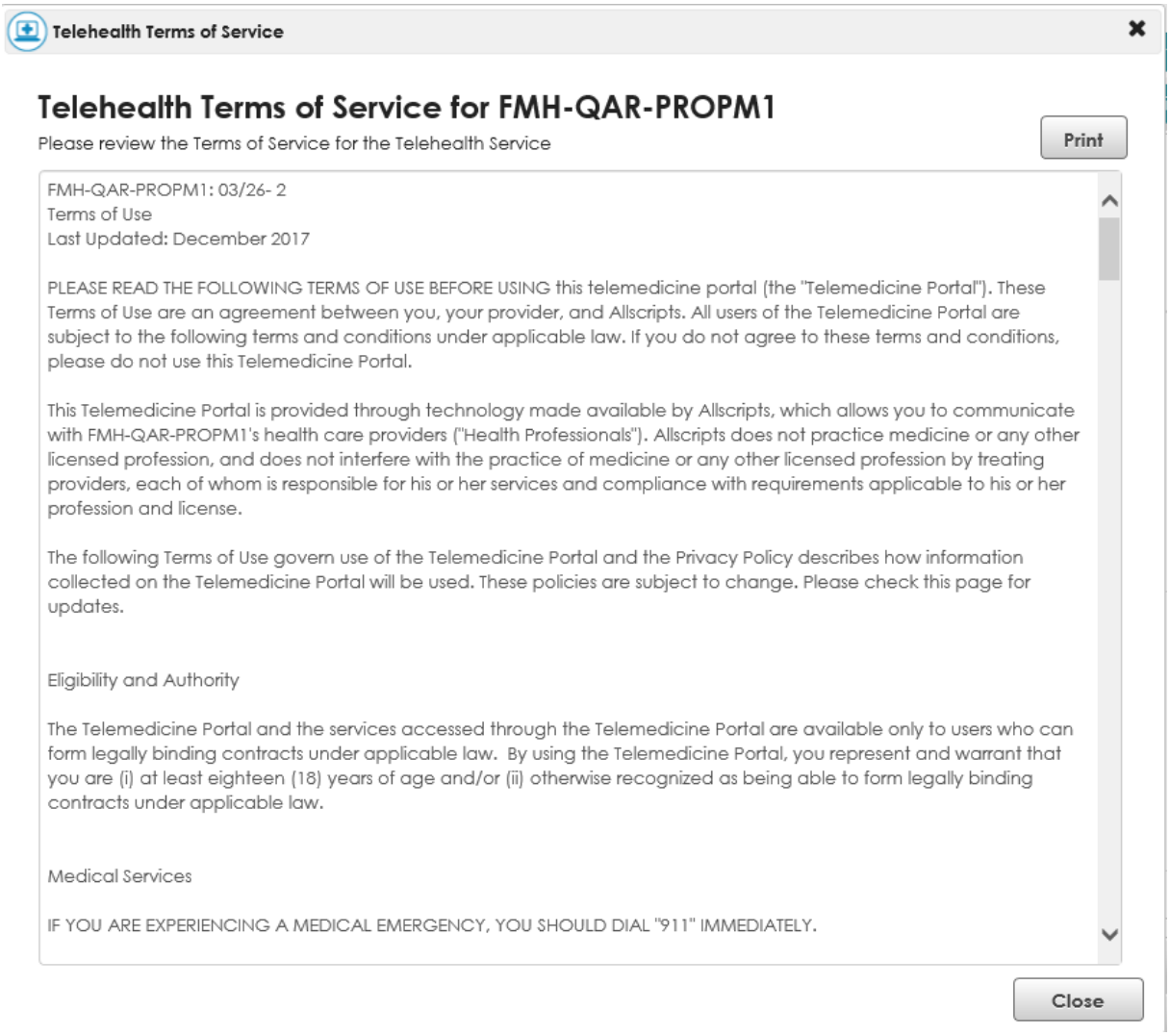
If you request an email visit with a provider who is currently out of the office, the out-of-office banner is displayed in yellow below the warning message. Even though the provider is out of the office, you can continue with the email visit request.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



6. Read **Things to know before using Email Visits**.
   This is important information that your provider wants you know before you start.
7. Click **View the Telehealth Terms of Service** to read the terms of service.
   Telehealth Terms of Service opens.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



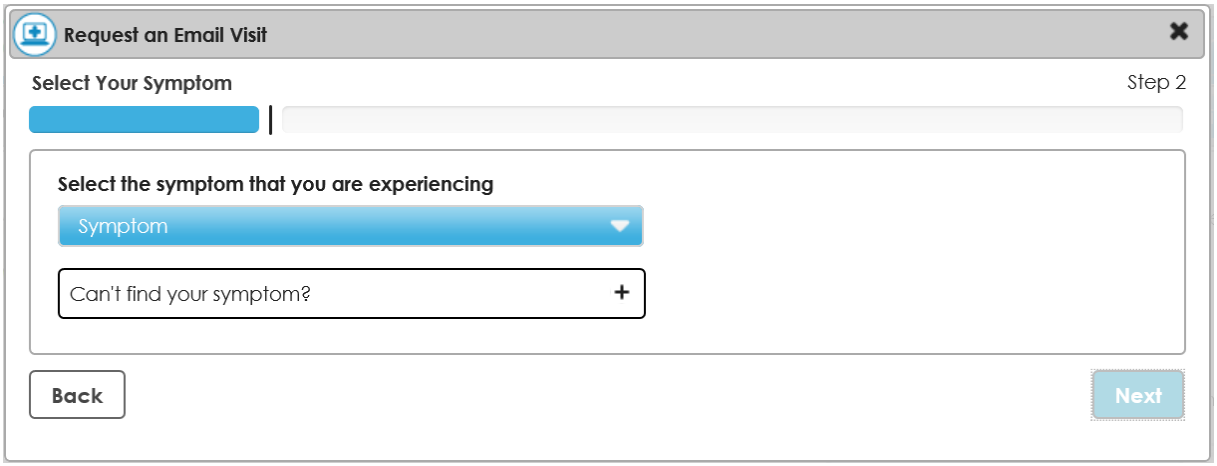
Click **Print** if you want a paper copy of the terms of service.

Click **Close** after you have read the terms of service.

8. Click **Next**.

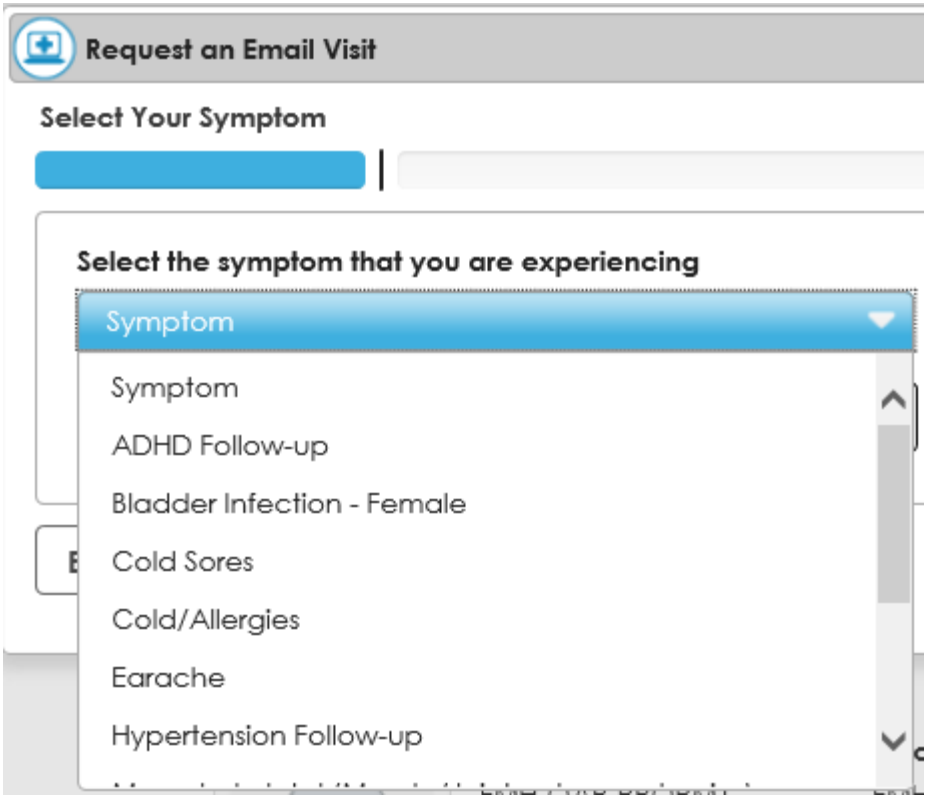
   Select Your Symptom is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



9. Click **Symptom** to display a list of symptoms.

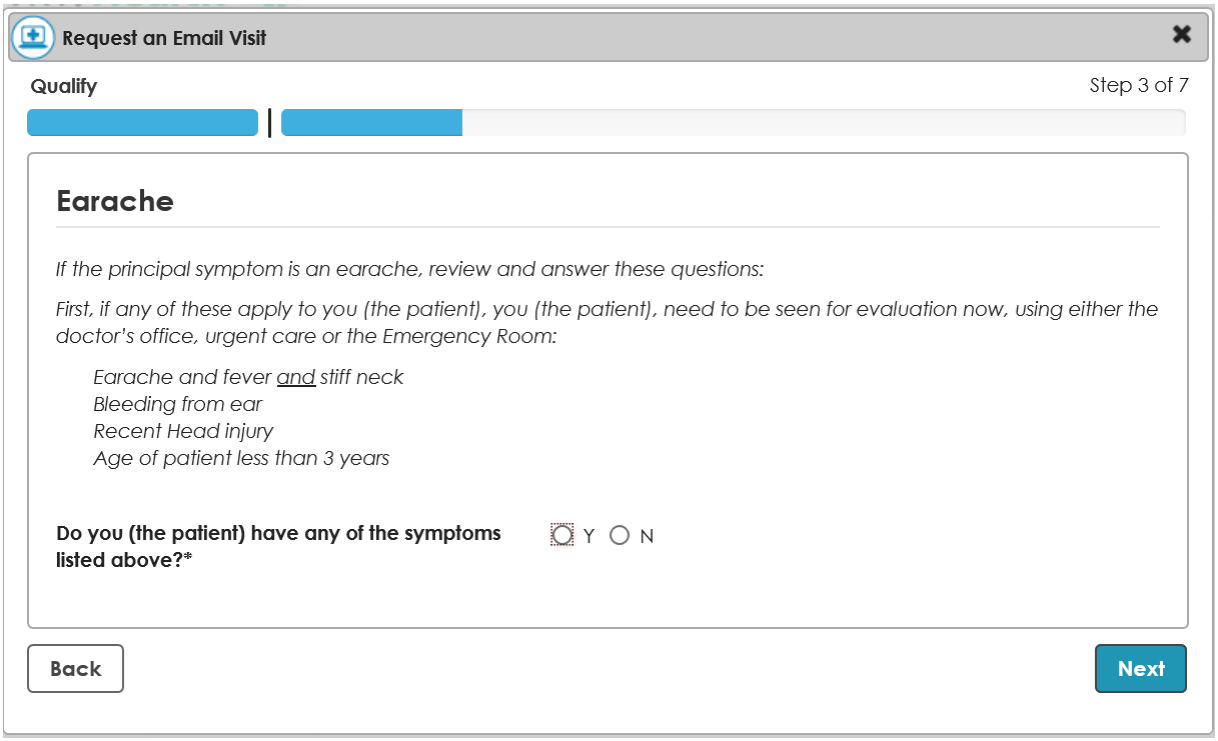
   If you do not see the symptoms that you are experiencing, you can click **Can't find your symptom > Make an In-Person Appointment**. The email visit workflow ends and **Schedule and Appointment** is displayed.



10. Select your symptom from the drop-down list and click **Next**.

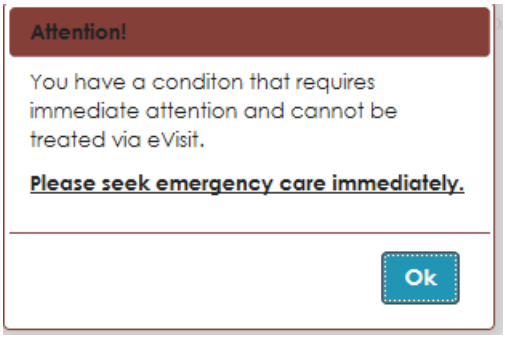
Allscripts FollowMyHealth® | September 11, 2018
Universal Health Record Patient Access v18.3 User Guide
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Qualify is displayed. The reason for the email visit that you selected is displayed at the top of the window.



11. Read the symptoms and conditions and select **Y** or **N**, depending on the following scenarios.

> If you are experiencing any of the conditions or symptoms listed, click **Y** (yes).
A message is displayed that confirms that you have a condition or symptom that is outside the guidelines for treatment through an email visit.



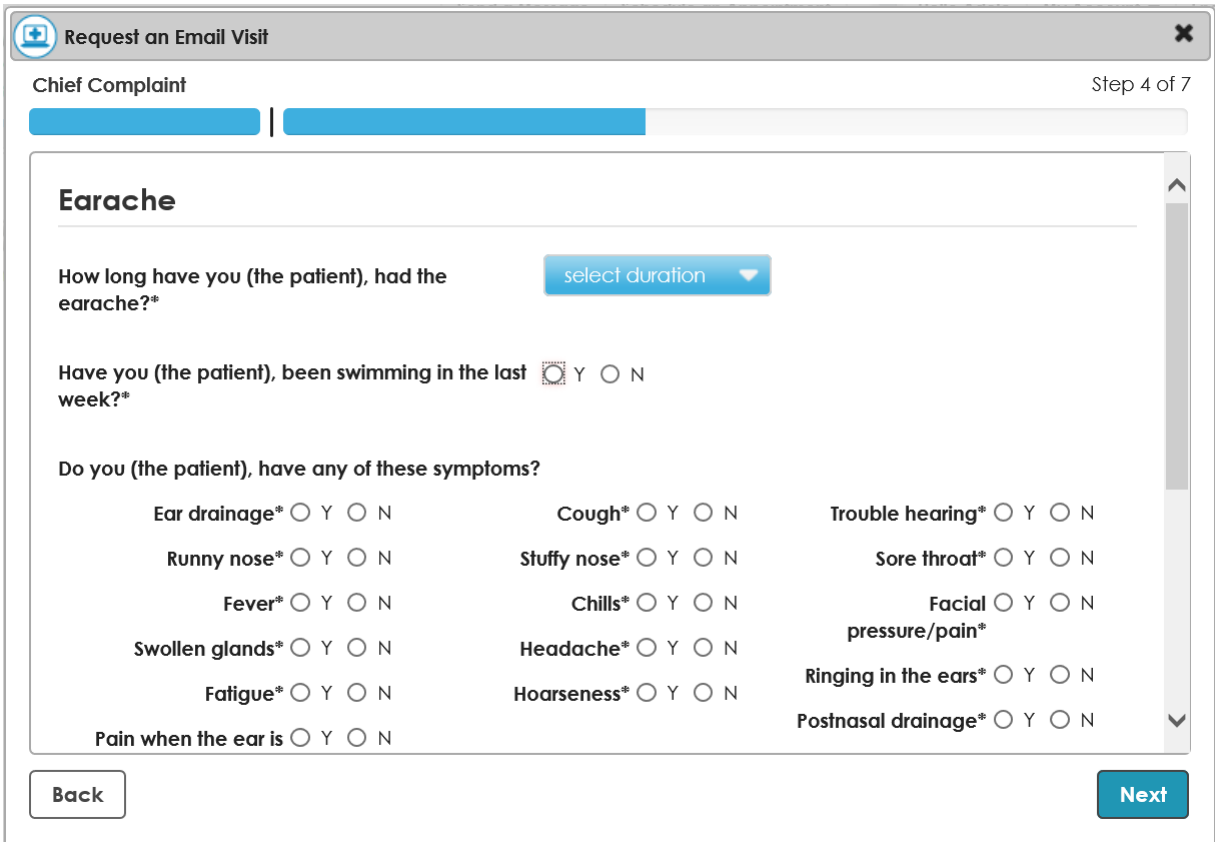
Click **OK**.

The email visit workflow ends.

> If you are not experiencing any of the symptoms or conditions listed, click **N** (no), and click **Next**.

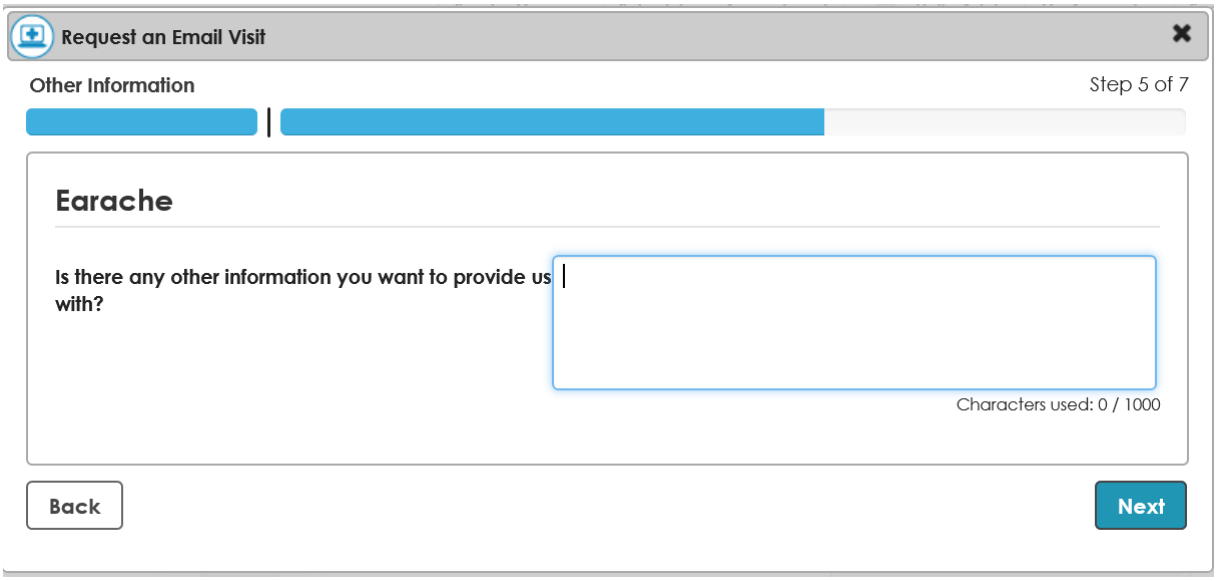
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chief Complaint is displayed.

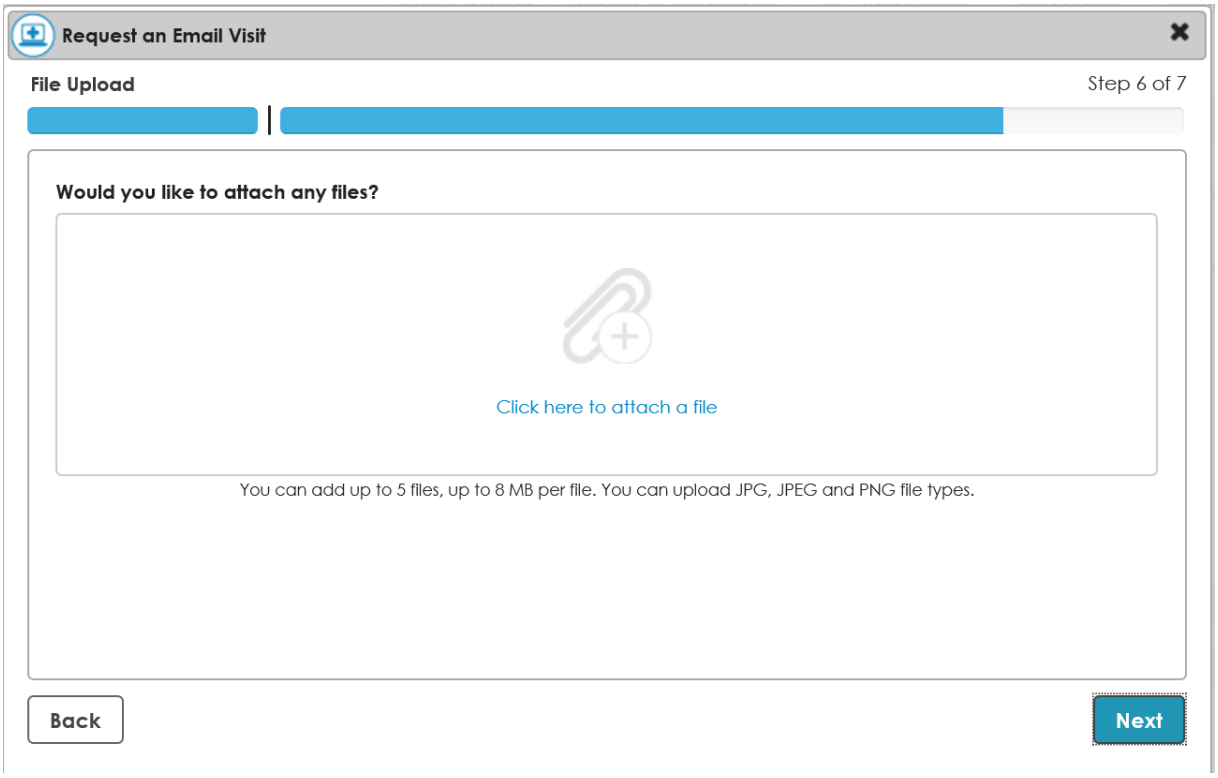


12. Answer the questions about your symptoms and click **Next**.
    Other Information is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



13. Enter information in the box that you want your provider to know and click **Next**.
    File Upload is displayed.



14. Attach files that are related to your condition that you want your provider to review.
    You can attach files in either of the following ways.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

- Drag and drop files from a folder on your computer into **Attachment Viewer**.
- Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to 5 files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

Upon completing the email visit, the file is accessible to the provider through the email visit message template.

15. Click **Next**.

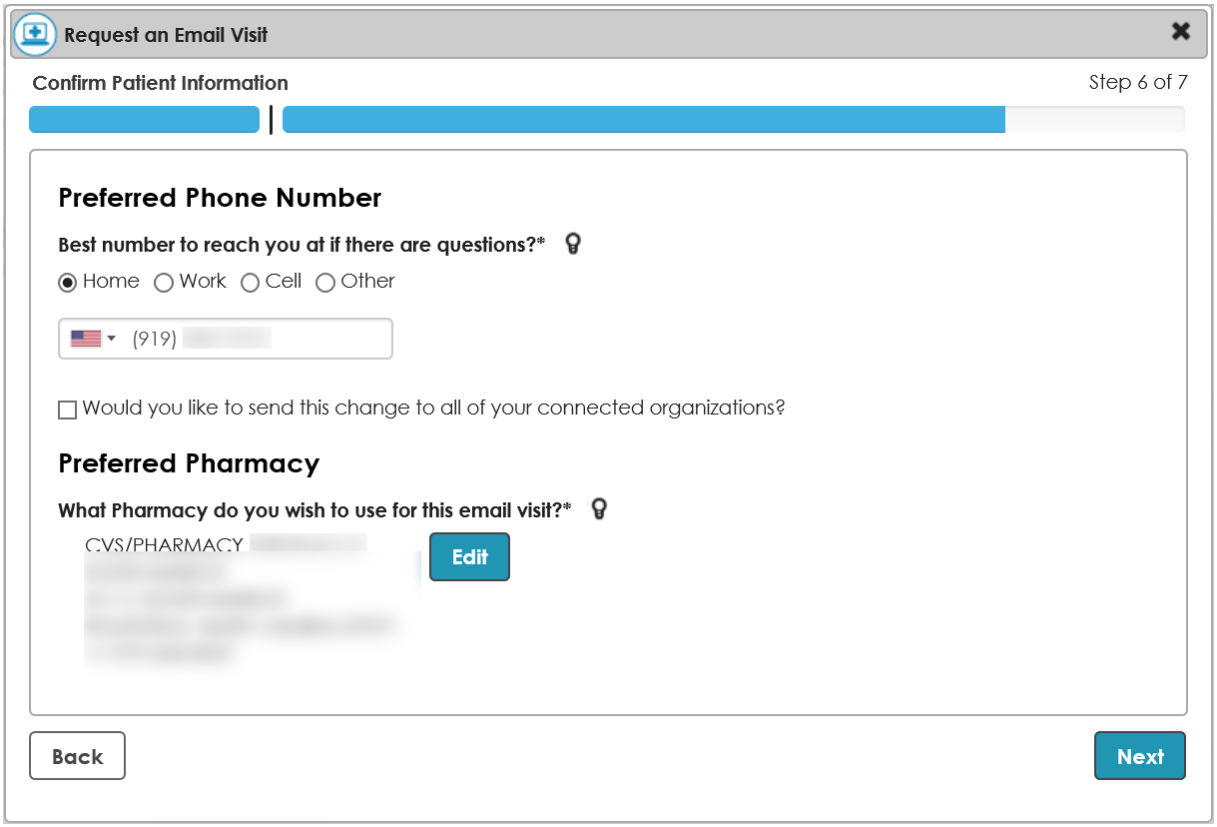
    Confirm Patient Information is displayed.

16. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.
17. Click **Next** or **Send**, depending on the following scenarios.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

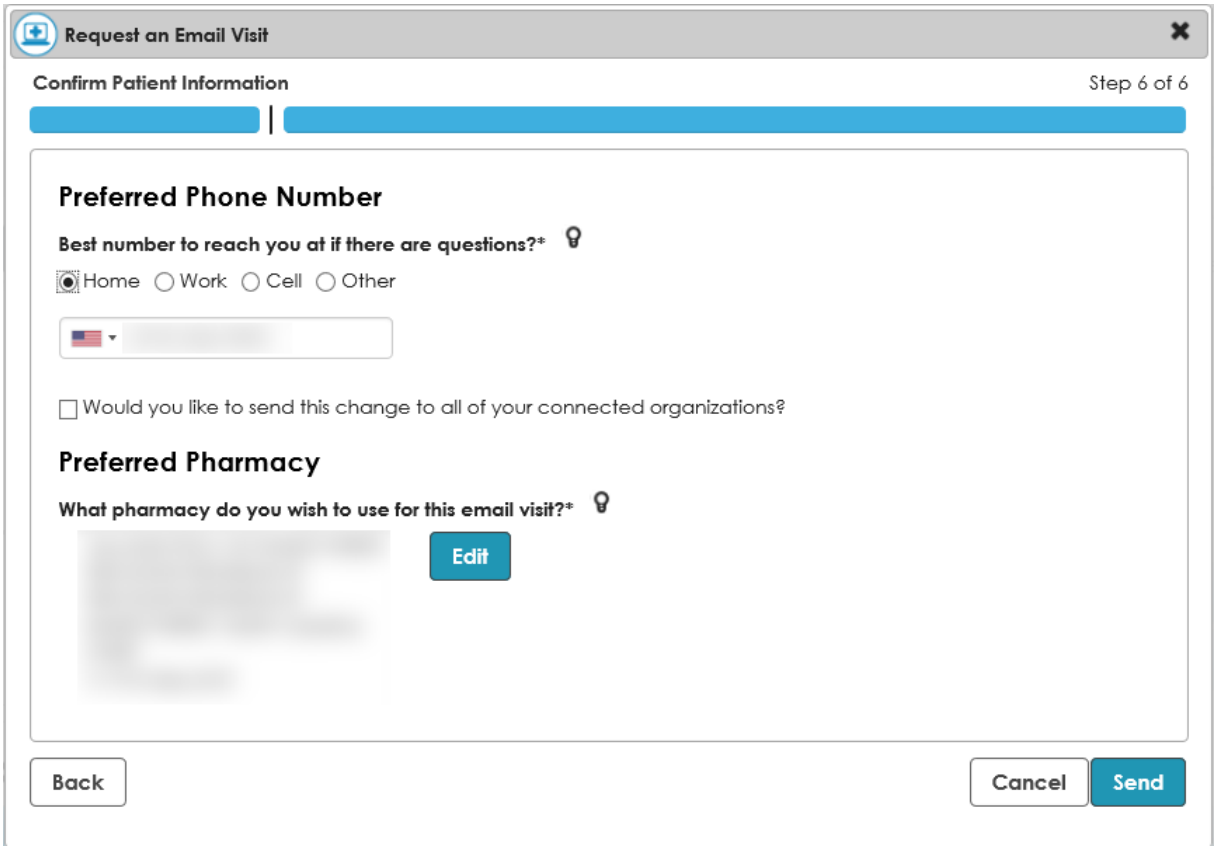
Next is displayed in **Confirm Patient Information** if your provider has enabled the email visit payment feature. **Send** is displayed instead of the **Next** button if the provider has not enabled the email visit payment feature.

Figure 20: Payment feature enabled: Send is available



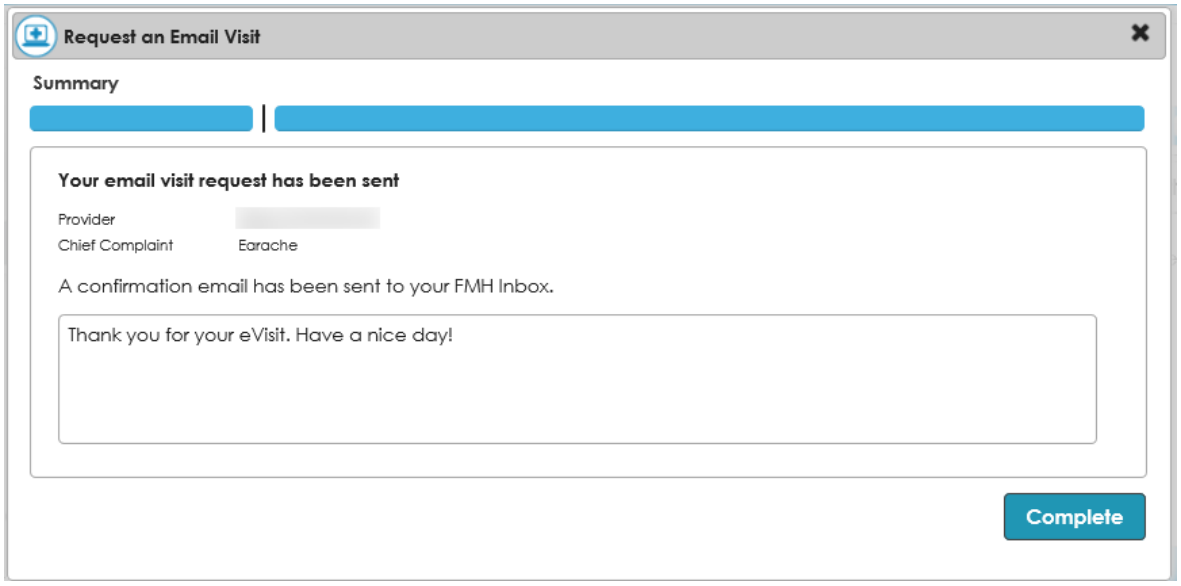
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Figure 21: Payment feature not enabled: Send is available



> **Your provider does not have the payment feature enabled and you cannot make a payment at this time.** Click **Send**.
> **Summary** is displayed.

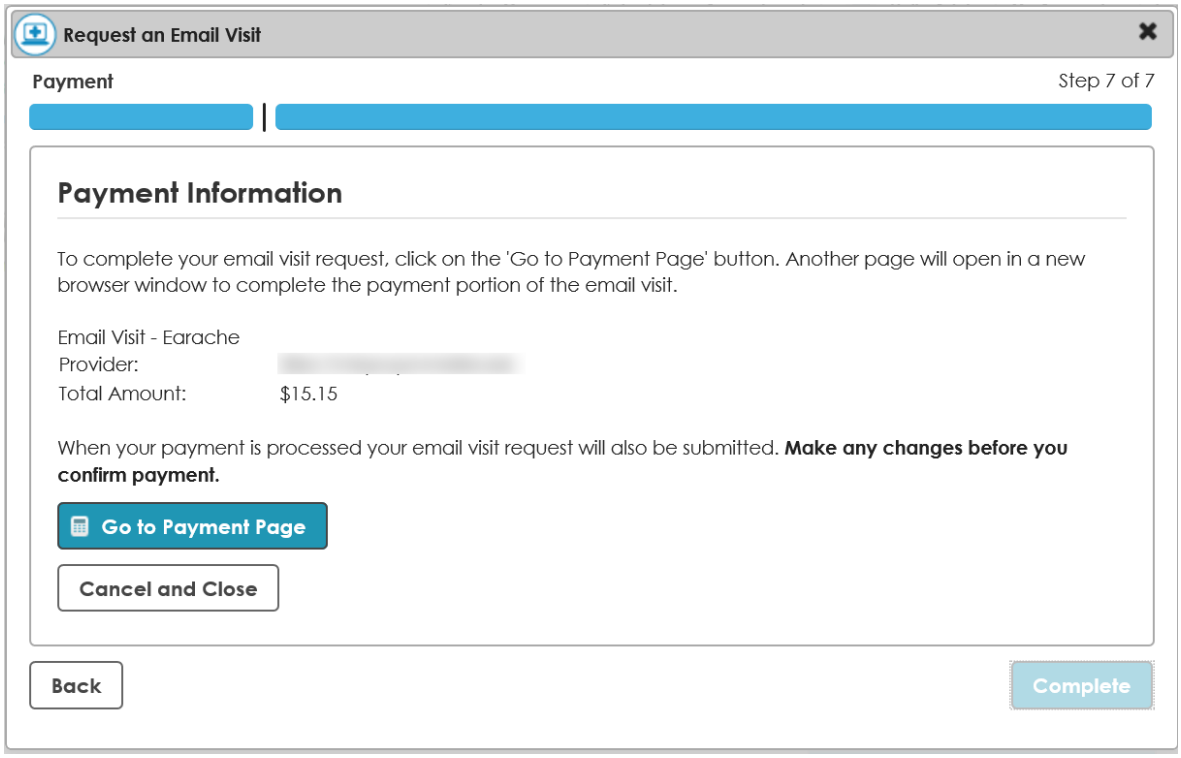
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



A message is displayed that indicates that your Email Visit is submitted to your provider.

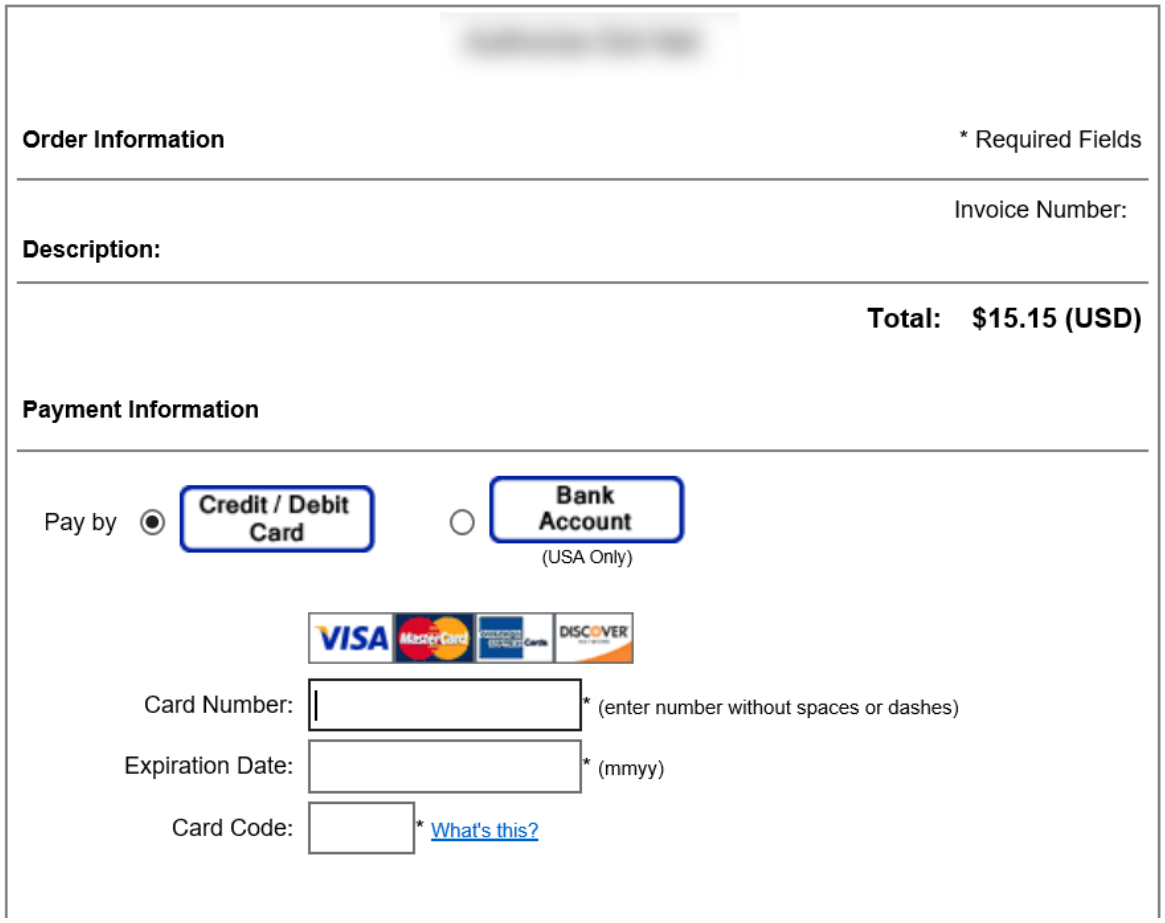
Go to step 17 to complete the email visit.

> **Your provider has the payment feature enabled and you can now make a payment.** Click **Next**.
Payment is displayed.



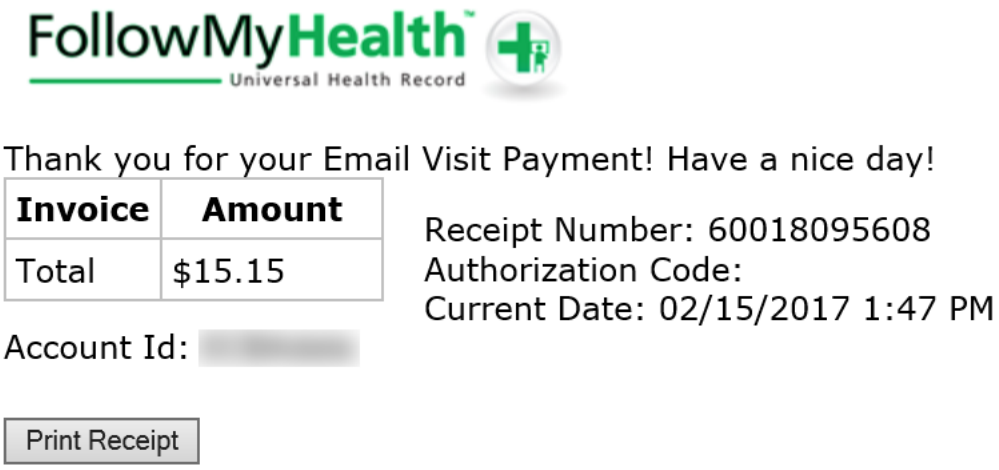
Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Click **Go to Payment Page**. The payment page is displayed.

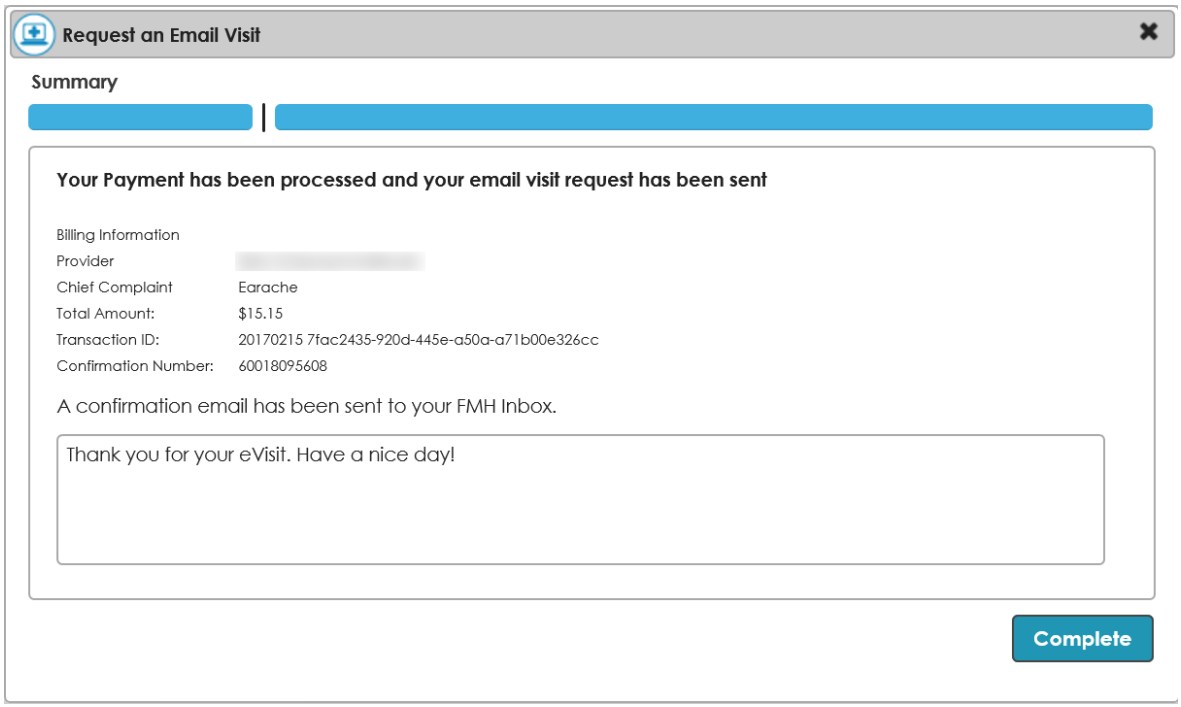


Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.



After your payment is processed, **Summary** is displayed.



Go to step 17 to complete the email visit.

18. Click **Complete**.

    The email visit workflow closes.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Results of this task

Your email visit request is sent to the provider. You can view the sent message from your **Sent** folder in **Inbox**. The message content is a summary of the email visit request.

The provider receives the email visit request, reviews your symptoms, creates a care plan, and responds to the email visit request. The message is sent to your inbox and you can retrieve your care plan. Your health record is also updated with the email visit information.

A receipt is also sent through an email message to your **Inbox** tab.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Chapter 10

Inbox

The **Inbox** tab contains all of the secure messages sent to and received from organizations that are connected to your universal healthcare record account.

The number of new messages in the **Inbox** tab is displayed on the **Inbox** tab.

Common options, such as **Forward** and **Reply**, are available, but the provider that you want to forward messages to, or who you want to reply to, must have these options enabled. You can also add attachments to email messages, print, move, and delete messages.

The default folders in the **Inbox** tab are **Inbox**, **Sent**, **Outbox**, and **Trash** folders. You can create folders, nest multiple folders, and edit existing folders.

Messages are sent to the **Outbox** after you click **Send**. Your initiated message is displayed in **Outbox** until the message is delivered. Then the message is moved to **Sent**. If the message fails, the patient portal attempts to resend it for 24 hours. If the message is still unsuccessful, the message is removed from **Outbox** and you will receive a Message Delivery Failure message in your Inbox informing you of the problem. You can then send a new message or contact your provider through a different method.

Compose an email message

Create and send email messages to communicate with your healthcare provider or other non-physician providers.

Before you begin

Not all healthcare providers or non-physician providers may be available for email messages. If the provider does not display for selection when you are composing a message, your organization has not enabled them for email messaging.

> **Important:** If your healthcare organization has enabled attachments, you can send your provider attachments, such as forms. Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window is displayed after you click **Send** with the message `You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send?.`

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

1. Sign in to the patient portal.
2. Click the **Inbox** tab.

   The **Inbox** tab is displayed.
3. Click **Compose**.

   Emergency Message Disclaimer is displayed.

   This disclaimer is displayed each time you create a new message. If you want to turn off the disclaimer, select **Do not show this message again**. Or, you can turn off all message disclaimers in **My Account > Preferences > Display Preferences** and clear **Display message disclaimer**.
4. Click **OK**.

   Compose Email is displayed.
5. For **To**, enter the email recipient.
6. For **Subject**, enter the reason for your email message.
7. (Optional) Add an attachment.

   > **Note:** You can add attachments only if your healthcare organization has this feature enabled. The **Attachments** box is not displayed if your healthcare organization does not support attachments.

   a. Click **Click here to attach a file** in **Attachments**.
   b. Browse for the file that you want to attach.
   c. Select the file.

      You can add up to 5 files, up to 25MB per file. You can upload JPG, JPEG and PNG file types.

      The file that you selected is displayed in the **Attachments**.

      If you want to remove the attachment, click the delete icon on the attachment image.
8. Click **Send**.

   If you are emailing a form, a window opens to inform you that you cannot change the form after it is emailed. Click **Send**.

   Message opens with **Email Sent** displayed.
9. Click **OK**.

Results of this task

You have composed an email message.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Create and edit Inbox folders

1. Sign in to the patient portal.
2. Click the **Inbox** tab.

   The **Inbox** tab is displayed.
3. Click **Add Folder**.

   Create New Folder is displayed.
4. Enter the name of the folder in **What would you like to name this folder**.
5. Click **OK**.

   The new folder is listed under the **Inbox** folder on the left.
6. To edit a folder, click **Edit Folder**.

   You can delete, rename, or move the folder.
7. Select the folder that you want to edit.

   The edit icons are displayed.
8. Click **Done**.

Results of this task

You have created and edited an **Inbox** folder.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Index

A

Action Center 97
  accessing from Home tab 97
activity history log 87
alternative sign-in 77
  adding 77
App Center 139–142, 145, 149, 151
  Blood Sugar 149
  Health Journal 142
  Home tab 140
  installing applications 141
  Know My Health 151
  My Charts 145
  single sign on, SSO 139
applications 139, 142, 145, 149, 151, 159–161
  Blood Sugar 149
  Fitbit 161
  Garmin 161
  Health Journal 142
  iHealth Labs 159
  Know My Health 151
  My Charts 145
  Nokia 160
  single sign on, SSO 139
  Telcare Blood Glucose Meter 159
appointments 101–103, 110, 115, 126, 128, 133, 136
  accessing from Home tab 101
  cancelling 133
  checking in 102
  direct scheduling 110, 115
    future 115
    next available 110
  forms 101
  location preference 103, 128
  past appointments 136
    viewing 136
  requesting 103
appointments *(continued)*
  rescheduling 128
  viewing upcoming appointments 126
authorized individual 43, 70

B

billing 138
  accessing from Home tab 138
  viewing invoices 138
Billing 71–75
  asking a billing question 75
    from Compose Email 75
  asking billing questions 75
    from Billing 75
  paying invoices 74
  questions 75
  viewing invoices 72–73
    from Action Center 72
    from Billing on Home tab 72
    from My Account 73
Blood Sugar 140, 149
  entering a reading 149

C

Connections 65–66, 68–70
  adding an authorized individual to your account 70
  adding connections to an organization 66
  configuring organization clinic settings 68
  devices and applications 65
  family members and dependents 65
  providers and organization 65
  sending a provider profile 70
  viewing providers 69
  visualizing 65

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

D

demographics 88–94
editing 89–94
birth sex, sexual orientation, gender identity 90
email address 91
emergency contact 92
insurance 94
preferred name 89
responsible party (guarantor) 93
devices 162
Fitbit 162
Garmin 162
iHealth Labs 162
Nokia 162
Telcare Blood Glucose Meter 162
Devices & Apps 65, 154–155, 157, 159–161, 213
accessing from Goals tab 155, 213
accessing from My Account 154
accessing from the Home tab 154
connecting, disconnecting 157
Fitbit 161
Garmin 161
iHealth Labs 159
Nokia 160
Telcare Blood Glucose Meter 159
Devices & AppsHome tab 152
device application library 152
display preferences 85
setting 85
accessibility 85
units of measure 85

E

email visit 253, 266
requesting 266
from Connections 266
Email Visit 165, 253
requesting 253
from Get Treated Now 253
existing account 57, 60
adding a connection with an email invitation 57
connecting to authorized individual 57
connecting your existing account to another account as authorized individual 60

F

Fitbit 161–162
setting up connection 161
FMH Sign In 9, 12, 18, 25, 29, 35, 43, 56, 78–81
creating an account 9
editing notification email address 78
editing password 79
recovering user name 12, 18
recovering your user name 9
resetting your password 25
signing in with 9
Two-factor authentication 80–81
forms 97

G

Garmin 161–162
setting up connection 161
Get Treated Now 165
Home tab 165
goals 155, 195, 197, 199, 202–205, 207, 212–213
active goal 212
declining 212
adding a reading 207
analyzing reading 207
blood glucose 199
blood pressure 202
broken order rule 207
changing your cell phone number 205
changing your email address 205
default goal reminders 205
accepting 205
deleting readings 204
Devices & Apps 155, 213
graph view 207

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

goals *(continued)*
managing multiple goals of the same type 205
new goal 205, 212
accepting 205
declining 212
starting a goal 207
step 203
table view 207
viewing goals 204
viewing readings 204
weight 197
weight management 195

H

Health Journal 140, 142
adding a journal entry 142
deleting a journal entry 142
editing a journal entry 142
printing a journal entry 142
viewing a journal entry 142
Health Summary section 97
accessing from Home tab 97
Home tab 97, 100–101, 138, 140, 152, 154, 165
Action Center 97
App Center 97, 140
appointments 101
Appointments 97
Billing 97, 138
Devices & Apps 152, 154
Get Treated Now 165
Health Summary 97
Recent Activity 100

I

iHealth Labs 159, 162
setting up connection 159
inbox 281, 283
email 281
composing 281
folder 283
creating, editing 283
invoices 74
paying 74

K

Know My Health 140

M

MedlinePlus 151
My Account 65, 71, 76, 81, 85–87, 154
Connections 65
Devices & Apps 154
managing billing 71
managing preferences 76
Preferences 81, 85–87
My Care Team 168
My Charts 140, 145
adding information 145
deleting information 145
printing 145
viewing 145
My Health 167–179, 181–192, 194
allergies 181
adding 181
editing 181
care team list 168
adding a provider 168
deleting a provider 168
editing a provider 168
chart 194
searching, viewing 194
clinical summary documents 169–171
downloading 170
emailing 171
exporting 170
importing 169
conditions, problems 172–176
active 172–173
adding 173
editing 172
family health conditions 175
adding 175
as an authorized individual 175

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

My Health *(continued)*
conditions, problems *(continued)*
personal health conditions 176
adding 176
surgical history 174
adding 174
conditions, problems, procedures 172
sorting 172
documents 192
adding 192
sorting 192
goals 194
health summary 169–171
immunizations 182–186
adding 183
emailing, printing, faxing 186
viewing 184
viewing CDC immunization schedules 185
viewing vaccine information sheets 186
medications 177, 179
adding 177
renewal 179
requesting 179
pharmacy 177
preferred pharmacy 178
adding 178
results 188–191
adding 189
graphing 190
range 191
sorting 188
viewing 191
sorting 177, 181–182, 187
summary 167
vital signs 187–188
adding 188
My Info 88–94
demographics 88–94
editing 89–94
birth sex, sexual orientation, gender identity 90
email address 91
emergency contact 92
insurance 94
My Info *(continued)*
demographics *(continued)*
editing *(continued)*
preferred name 89
preferred pharmacy 92
responsible party (guarantor) 93
My Reminders 216, 219
goal reminders 216, 219
adding 216
deleting 219
editing 219

N

Nokia 160, 162
setting up connection 160
notification preferences 81, 83–84
setting 81, 83–84
appointment reminders 81
cell phone number 81, 83
check-in reminders 81
email address 81, 84
goal alerts 81
organization bulletins 81
reminders 81
updates to health record 81
notifications 215
appointment reminders 215
completed reminders 215
goal alerts 215
goal reminders 215
My Reminders 215
adding 215

O

on-demand video visit 224
notifications in waiting room 224
starting 224
video and audio settings 224

P

patient verification 35

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Preferences 76–81, 83–87
account preferences settings 76
activity history settings 76
deleting your universal health record 86
editing FMH Sign In notifications 78
editing FMH Sign In password 79
managing 78
notification settings 76
restoring deleted items 86
restoring deleted items settings 76
setting display preferences 85
setting notifications 81, 83–84
sign-in 76
managing sign-in methods 76
Two-factor authentication 80
viewing activity history log 87
visual display settings 76
prerequisites 7
supported browsers 7
providers 69–70

R

Recent Activity 100
accessing from Home tab 100
ROI, release of information 29
renewing 29

S

scheduled video visit 237, 248
notifications in waiting room 248
scheduling 237
starting 248
video and audio settings 248
security 80–81
Two-factor authentication 80–81
sign-in 9, 29, 35, 43, 53, 56–57, 60, 77–80, 139
adding alternative sign-in methods 77
existing account 53, 56
with alternative methods 53
sign-in *(continued)*
FMH Sign In 78–80
new account 29, 35, 43
connecting to another account 43
creating an account through email invitation 29
creating an account without an email invitation 35
getting started 29
single sign on, SSO 139
with FMH Sign In 9, 56
static toolbar 63–65
My Account 65
searching your health record 64

T

technical support information 87–88
Telcare Blood Glucose Meter 159, 162
setting up connection 159
Two-factor authentication 9, 80–81
adding 80
turning off 81

U

user manual 87–88
user name 12, 18
recovering from Sign Up and Connect window 18
recovering from sign-in window 12

V

video visit 251
Action Center notifications 251
video visits 165, 222, 237
scheduled 237
Video visits 221
prerequisites 221

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.

Index

Copyright © 2018 | Allscripts Healthcare, LLC
This page contains Allscripts proprietary information and is not to be duplicated or disclosed to unauthorized persons.