WellSky® Hospice and Palliative

Patient Portal - Patient Guide

Software Version: Not applicable

Last Update: March 27, 2023

HCONGUPPPG2023_01

Copyright

Printed in the United States – 2023

Contact Us

WellSky Corporation
11300 Switzer Road
Overland Park, KS 66210

Web: http://www.wellsky.com

Customer Support: 877.846.5831, press 3

Customer Support Email: consolo.support@wellsky.com

Please identify the name of your organization in voice mails or emails.

Document Revision History

Last Update	Release Date	Release Version	Revision Description
March 27, 2023	Not applicable	Not applicable	The first version of the document.

Contents

This Page Intentionally Left Blank

Introduction

This guide provides an overview of the Patient Portal feature in WellSky® Hospice and Palliative. If you have questions about how to use it, contact the agency providing your care.

The WellSky Hospice and Palliative Patient Portal

The WellSky Hospice and Palliative Patient Portal (also called a portal) is a secure way for you or your family to access your Health Record online through an internet connection. The portal helps you track health-related information like visits, lab results, and medications. It also provides a way to contact your care provider (the agency who gave you this document) through secure messaging.

The following are the steps to using the portal:

1. To access the WellSky Hospice and Palliative Patient Portal, the agency (also known as the care provider) providing your care will send you an email invitation to register to use the portal.
2. You will open the email, click the appropriate link, then enter your (the patient's) last name, date of birth, and the last four digits of your social security number to complete the portal registration.
3. Once you register to use the Patient Portal, you can grant your family or other representatives access to your Health Record via the portal. See Grant Access to Your Health Record.

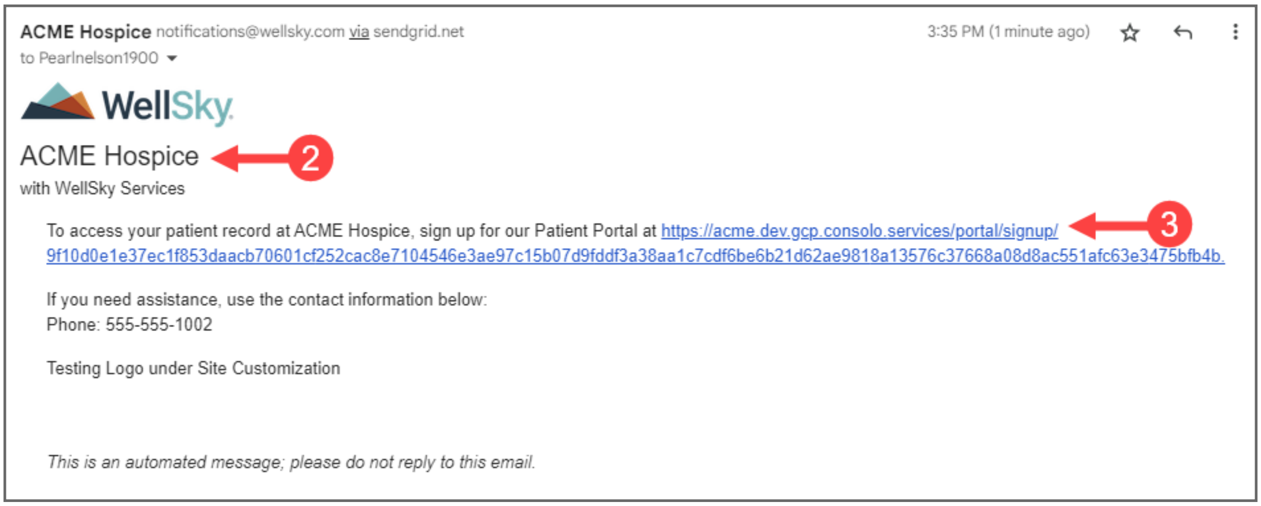
   NOTE – If you need, the agency can invite other family members or representatives, on your behalf, to signup to access your health record via the portal.

4. If needed, you or other family members can access more than one patient's Health Record in the WellSky Hospice and Palliative portal, such as when more than one family member receives services from the same agency. See Complete Signup to Access Another Patient's Health Record.

Register to Use the Patient Portal

After you, or your family or representative, receive the invitation via email to access your health record in the Patient Portal, complete these steps, entering your (the patient's) information when prompted.

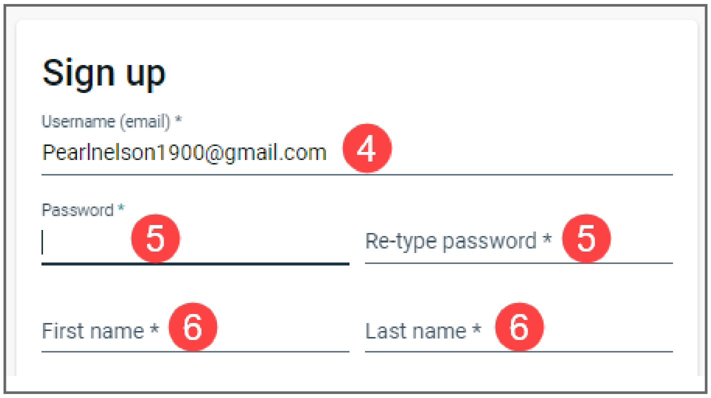
1. Open your email.
2. Open the email from WellSky with the subject *Patient Portal Signup*. You may also see the agency's logo if one was included. In this example, the Acme Hospice agency sent this email.



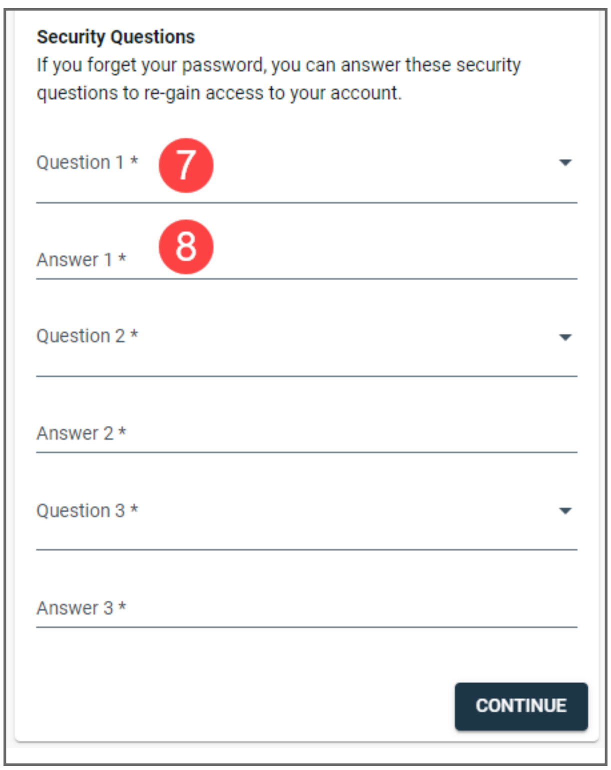
3. Click the link in the email to access the patient portal.

> **NOTE –** The link is good for two weeks and allows access to your patient chart only. If the link expires, ask the agency to send you another invitation.

4. On the Sign up screen, your email address automatically populates.

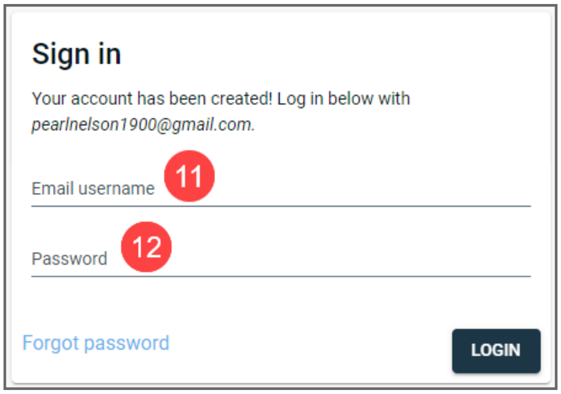


5. Enter a password in the **Password*** field, then re-type it in the **Re-type Password*** field.
6. In the **First Name*** and **Last Name*** fields, enter your first and last name, respectively.
7. In the Security Questions section, select a question from the **Question 1*** drop-down list.

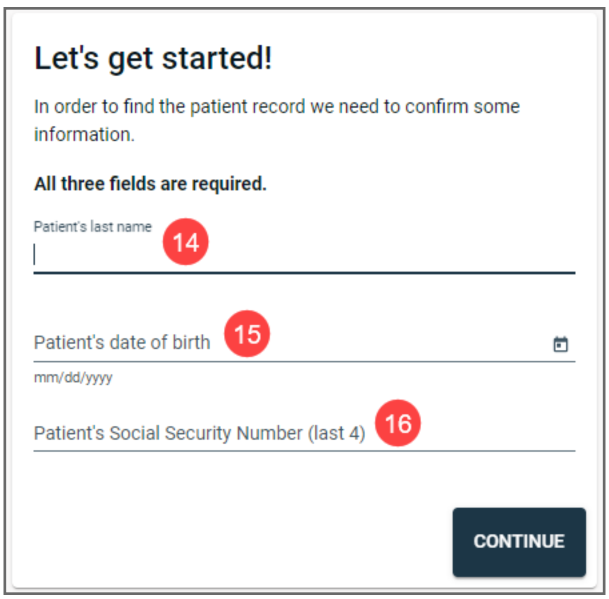


8. In the **Answer 1*** field, enter your answer (5 characters minimum are required).
9. Repeat steps 7 and 8, selecting questions for **Question 2*** and **Question 3***, then enter the corresponding answers in the **Answer 2*** and **Answer 3*** fields, respectively.
10. Click **CONTINUE**.

11. On the Sign in screen, enter your email in the **Email username** field.



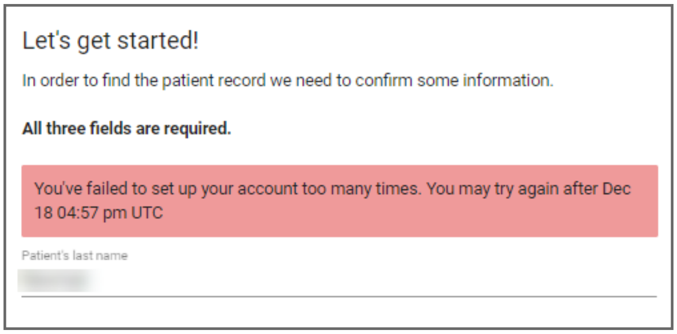
12. Enter your password in the **Password** field.
13. Click **LOGIN**.
14. On the Let's get started! screen, enter your last name in the **Patient's last name** field.



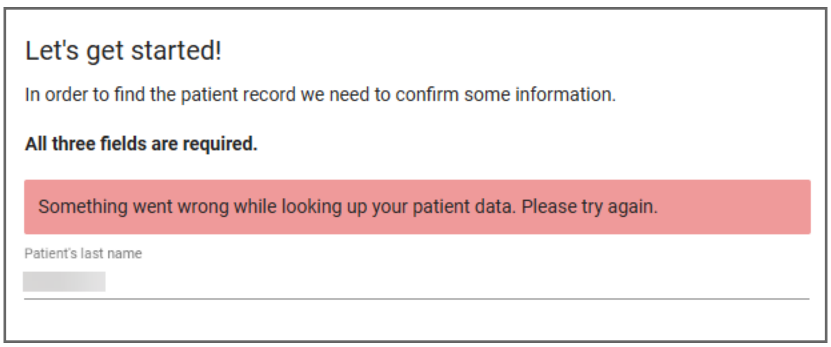
15. In the **Patient's date of birth** field, enter your birth date (mm/dd/yyyy) or click , then select a year, month, and date from the calendar.
16. In the **Patient's Social Security Number (last 4)** field, enter the last four digits of your social security number.

17. Click **CONTINUE**. If you receive an error, see below. If not, proceed to the next step.

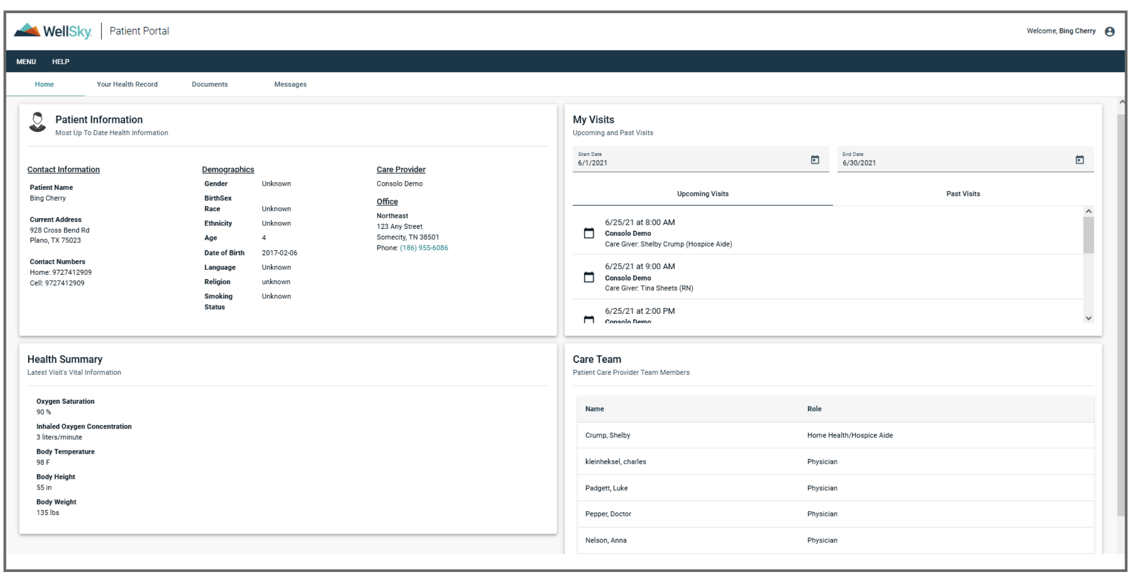
    You will receive an error if you attempt to set up your account too many times. Wait the specified amount of time, then try again.



If something goes wrong during login, you may see this error. Ensure your data is entered correctly. If you continue to have issues, contact the agency.

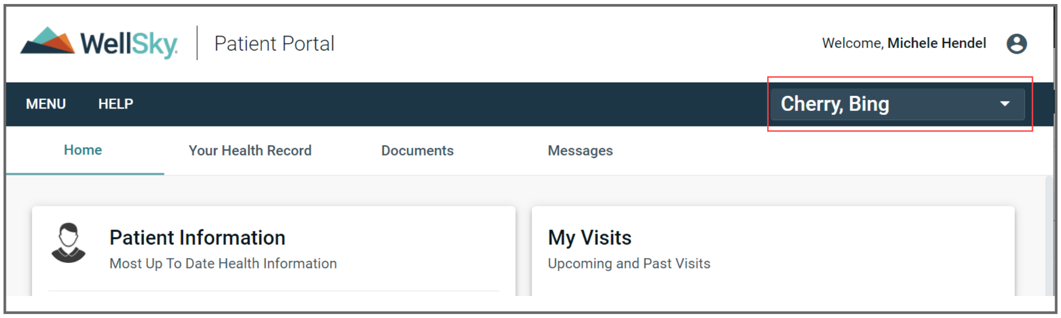


18. The Patient Portal opens to the Home tab. For more information, see Patient Portal Overview.



19. Bookmark the website so you can return to the Patient Portal when needed.

NOTE – If you have access to more than one patient's Health Record in the portal, a drop-down list displays in the upper-right corner. To switch patient Health Records, select a different name from this drop-down list.

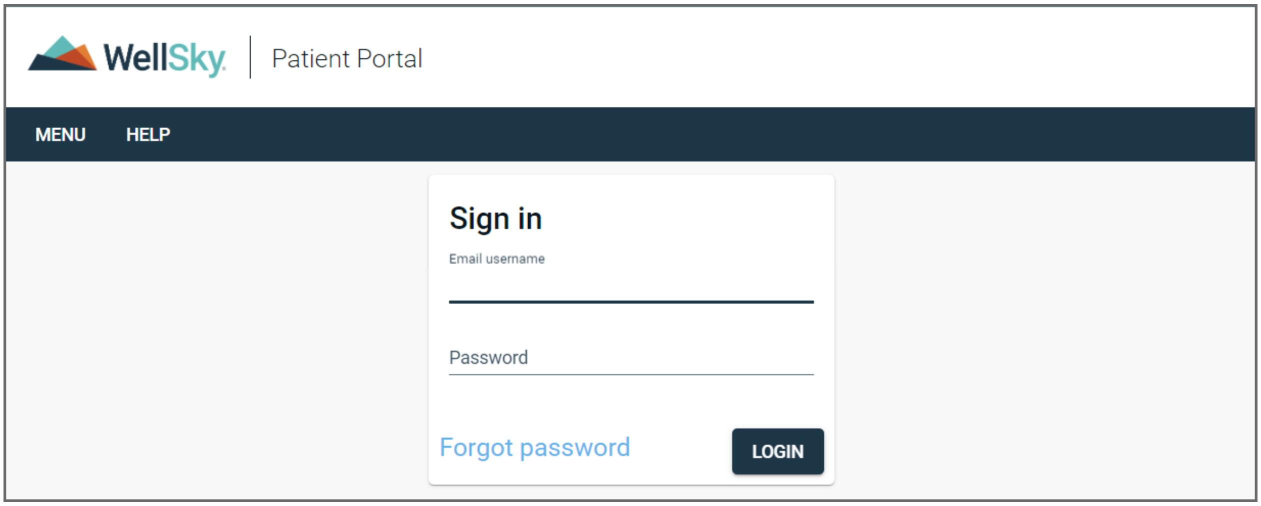


20. When you log in to the portal later, use the same email and your newly created password. See [Log in to the Patient Portal](#).

Log in to the Patient Portal

To return to the Patient Portal after registering, complete the following steps.

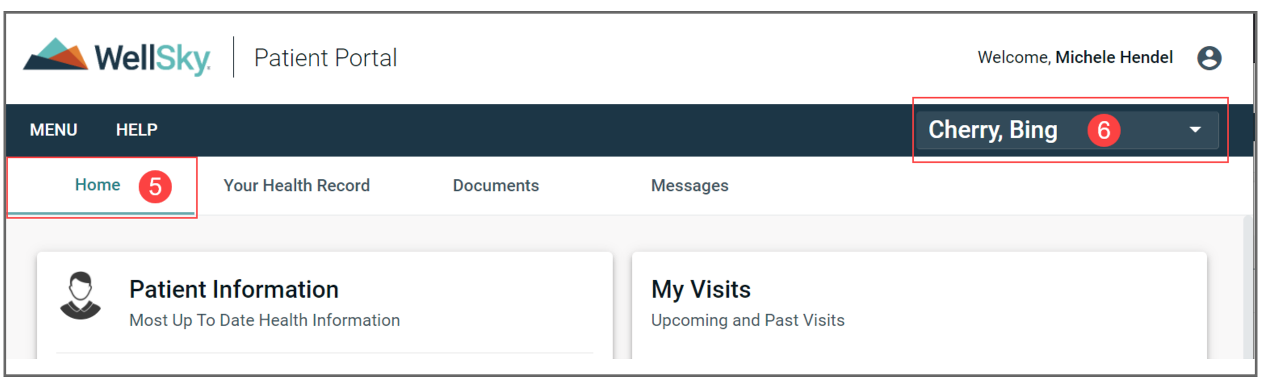
1. Find your browser bookmark, then open it.
2. On the Patient Portal login screen, enter your email in the **Email username** field.



3. Enter your password in the **Password** field.
4. Click **LOGIN**.

> **TIP –** If you forgot your password, click **Forgot password**. See [Reset Your Patient Portal Password](#) for more information.

5. The Patient Portal opens to the Home tab. See [Patient Portal Overview](#) for more information.



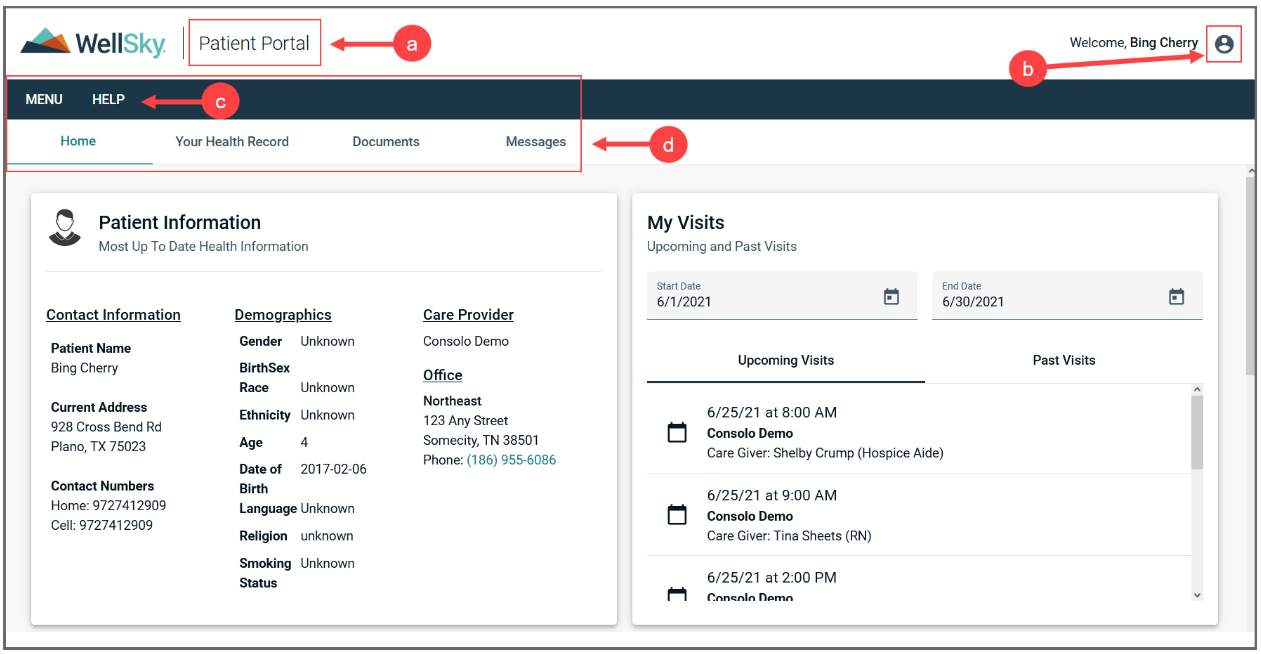
6. If you can access more than one patient portal, a drop-down list displays in the top-right section. To switch portals, select a different name from the drop-down list.

Patient Portal Overview

Important! You, or your family members or other representatives, can access the Patient Portal after completing the registration process.

Use the following features to navigate the Patient Portal:

a. In the upper left, click **Patient Portal** to return to the Patient Portal's Home tab.



b. In the upper right, click to display these options:

My Account

- See which Patient Portals you have access to.
- Contains your Patient Portal settings, such as your name and email, and the following options:
  - View Your Account Details
  - Change your name
  - Change your email
  - Change your password
  - Change your security questions
- If needed, you can access the following Application Programming Interface (API) tools:

  - Access Tools and API Documentation
  - Generate an API Key

  Logout – Select this option to log out of the Patient Portal. See Log Out of the Patient Portal.

c. Click an option on the Menu bar, then select an item from the list:

   MENU – Access the following links:

   - **Patient Activity Log** – View the activity in your Patient Portal (who accessed the portal and when). See View Health Record Access History.
   - **New Patient Signup** – Log in to a different patient's Health Record via the Patient Portal (if you have been granted access to more than one patient's record). See Complete Signup to Access Another Patient's Health Record.

   HELP – Access the Contact Care Team link. See Send a Message.

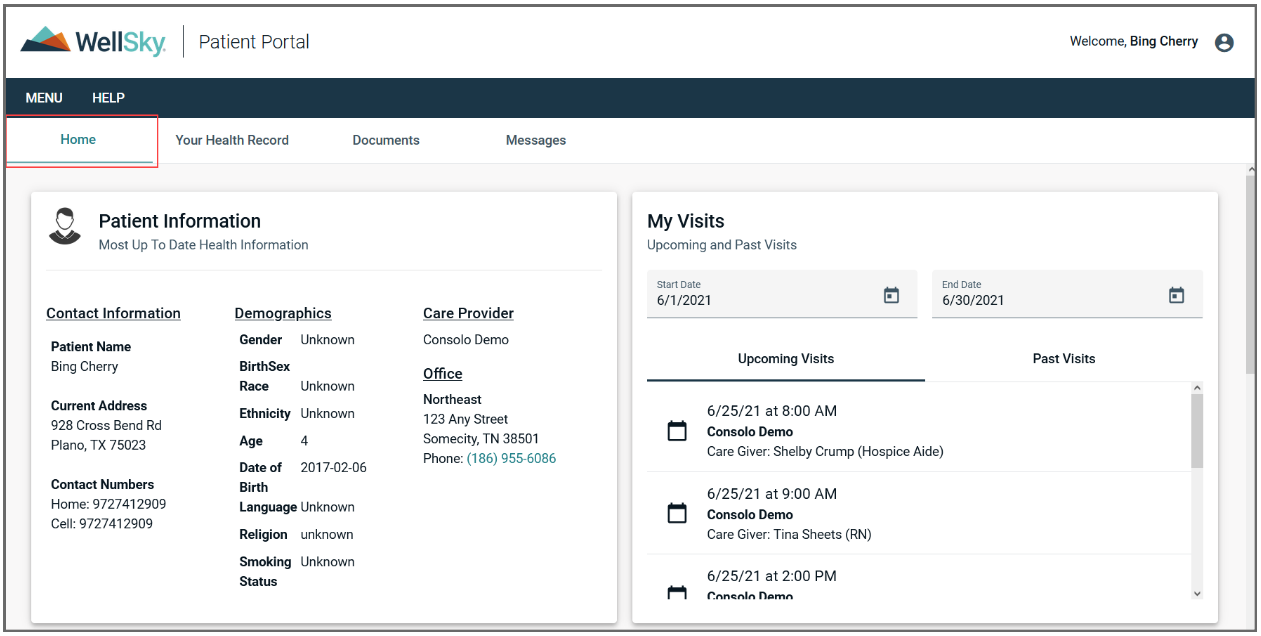
d. Click one of the following Patient Information tabs to display your information in the table. In this example, the Home tab is selected.

   - **Home** – View the patient's information on file, scheduled visits, vitals, and the patient's care team. See Home Tab.
   - **Your Health Record** – View the patient's Health Record information. See Your Health Record Tab.
   - **Documents** – View documents that the agency has shared with their patients. See the Documents Tab.
   - **Messages** – Communicate with the patient's care team. See the Messages Tab.

Home Tab Overview

The Patient Portal's Home tab contains information entered by your care provider in your medical record, including personal information, scheduled agency visits, latest vitals, and care team details.

Click **Home** in the top left to open the information in this tab.



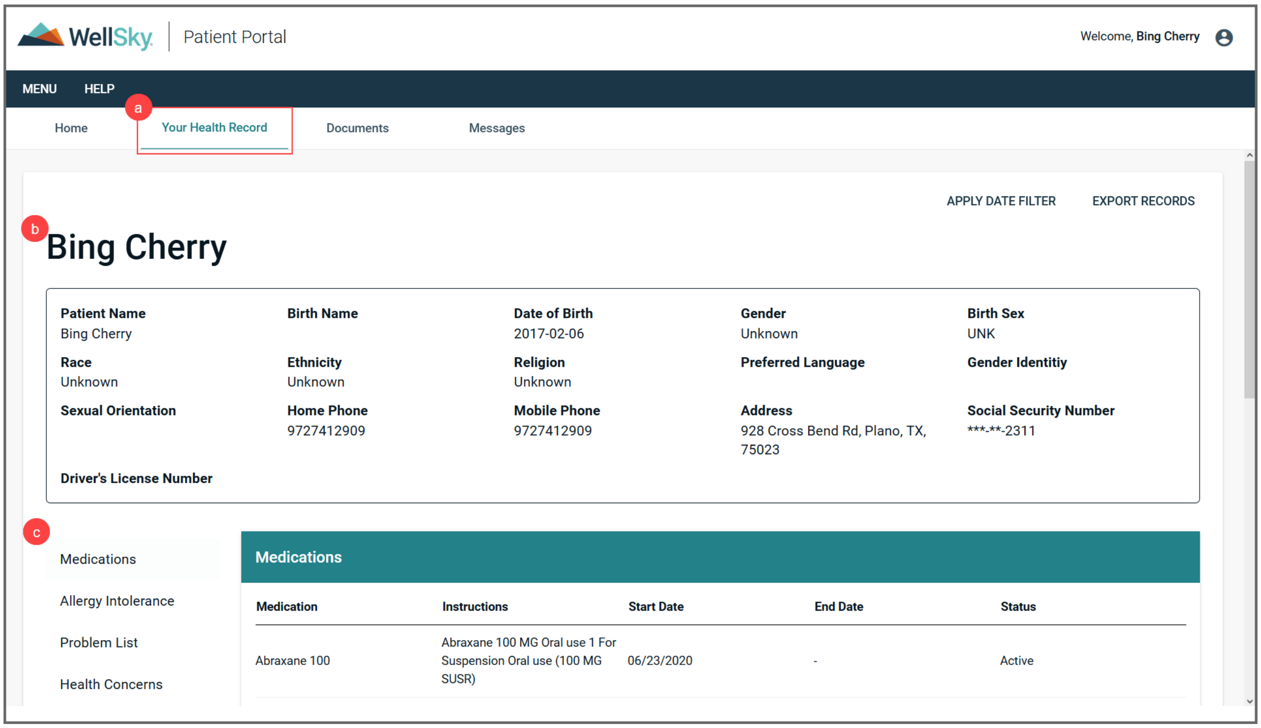
Move down the page to view the following information:

- **Contact Information** – Your current contact information.
- **Demographics** – Your current demographics.
- **Care Provider** – Your current care provider (agency) and contact information.
- **My Visits** – Upcoming and past agency staff visits within a given date range. If needed, you can change the date range by clicking in the **Start Date** and **End Date** fields, then select a different date from the calendar that displays.
- **Health Summary** (not shown) – Your vitals information from the latest nursing visit.
- **Care Team** (not shown) – Agency staff assigned to care for you.

Your Health Record Tab Overview

The Your Health Record tab in the Patient Portal contains your personal and health information entered by your care provider in your medical record.

a. Click **Your Health Record** in the top left to open the information in this tab.



b. Your personal information displays at the top of the page.

c. Click a tab on the left to display that health information in the table on the right. The tabs that display depend on the information entered in your medical record and may include the following:

- Admission Diagnosis
- Allergy Intolerance
- Assessment and Plan
- Care Team
- Clinical Notes
- Condition
- Consultation Note
- Device

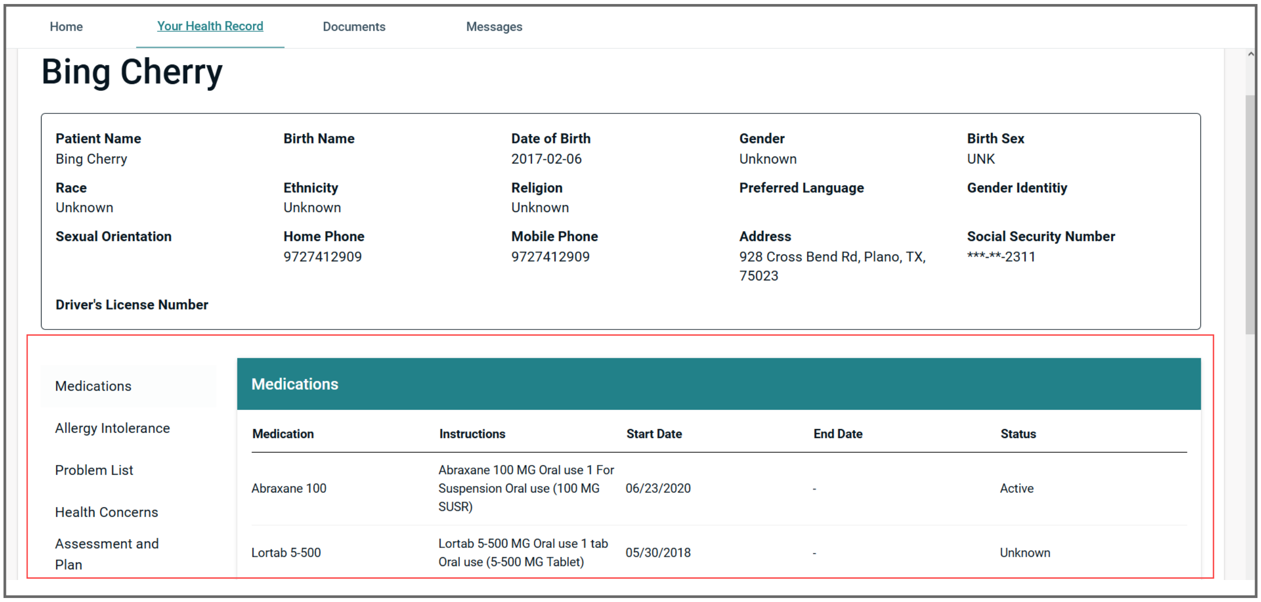
- Diagnostic and Lab Results
- Discharge Summary Note
- Encounters
- Functional Status
- Goals
- Health Concerns
- History & Physical Note
- Immunizations
- Lab Report Narrative
- Location
- Medical Equipment
- Medications
- Medication Request
- Mental Status
- Observation Vital Signs
- Organization
- Patient
- Practitioner
- Problem List
- Procedures
- Procedure Note
- Progress Note
- Reason for Referral
- Social History
- Vital Signs

To view or export your Health Record within a specific date range, see either View Your Health Record Information or Export Your Health Record.

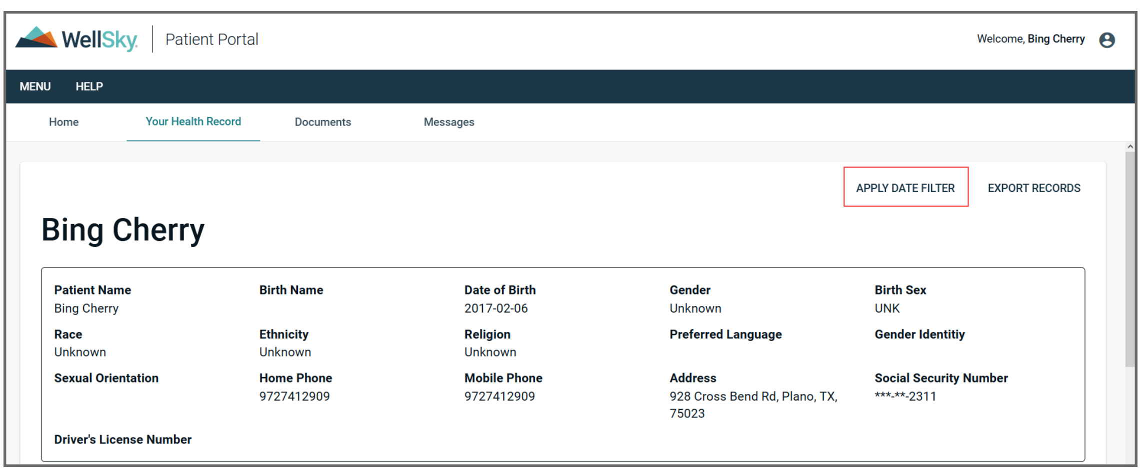
View Your Health Record Information

To view your health record information in the Patient Portal, complete these steps.

1. From the Patient Portal, click the **Your Health Record** tab in the top left.
2. Go to the table at the end of the page to view your health information.

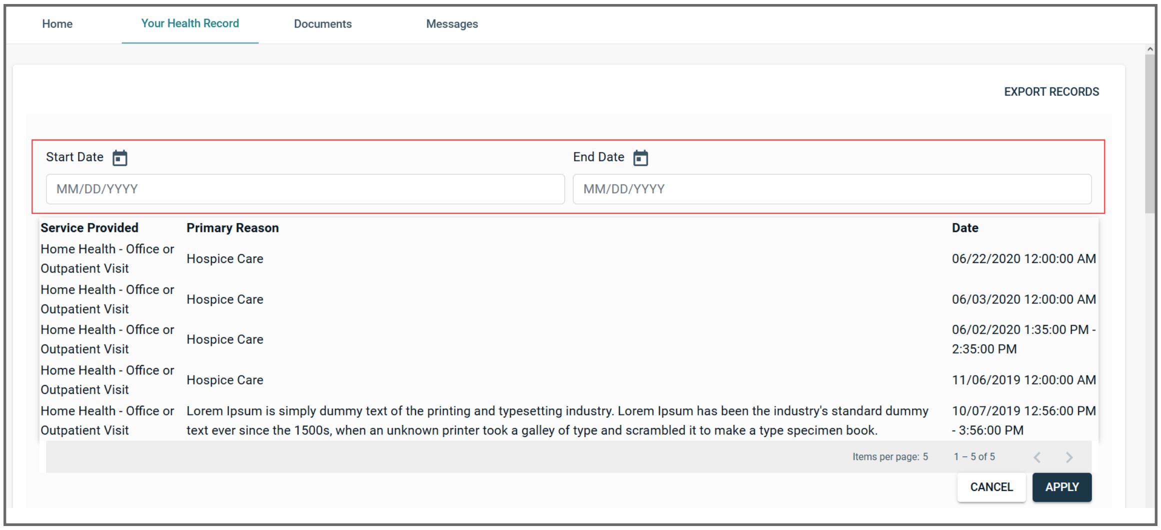


3. If needed, enter a date range to view your health information within a specific time frame.
   a. In the upper-right corner, click **APPLY DATE FILTER**.



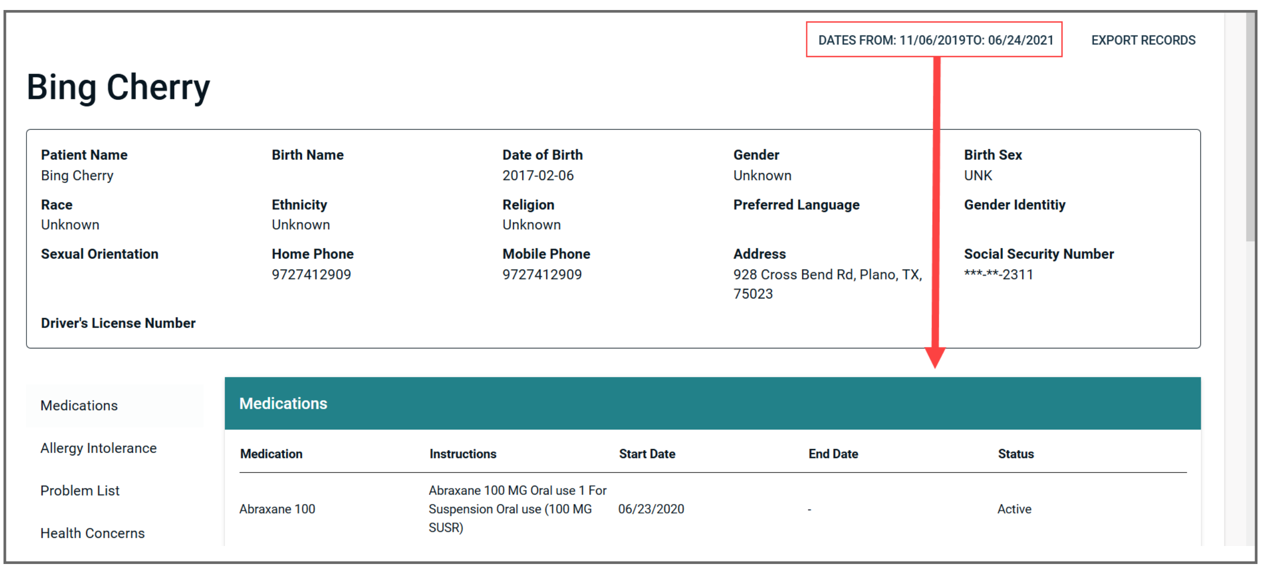
b. Click the **Start Date** calendar (), then select a date from the drop-down calendar. Next, repeat the same process for the **End Date**.

> **NOTE –** A list of the most recent services displays to help you select a date range.



c. In the lower right, click **APPLY**.

4. The Date Filter displays the selected date range, and the table below your demographic information updates and displays information only within the date range.



Export Your Health Record

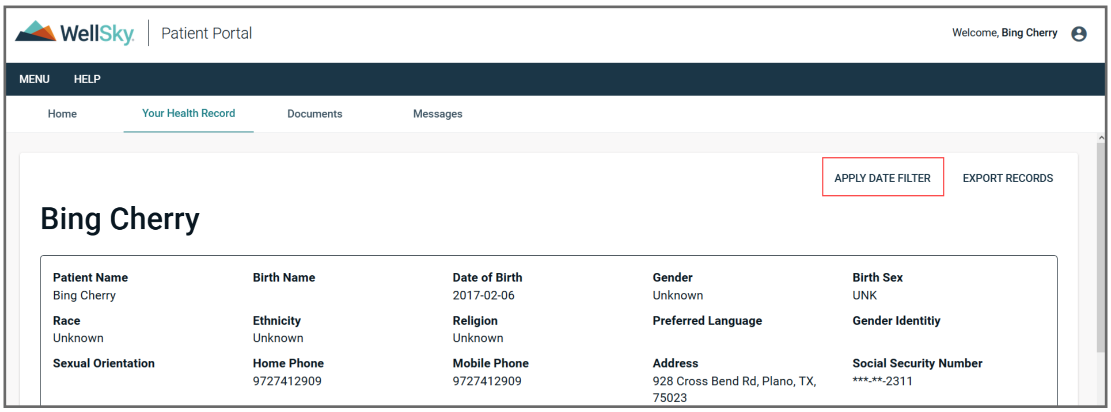
You can export your health record from the Patient Portal in one of the following ways:

- **Print** – Print a copy of the records. See Print Your Health Record.
- **Download PDF** – Download a PDF of the records. See Download a PDF of Your Health Record.
- **Download Clinical Data** – Download the records in a Consolidated Clinical Document Architecture (CCDA) format or structured document that can be shared or imported into another medical record system. See Download Your Health Record in CCDA Format.
- **Transmit Clinical Data** – Send the data to another provider in a structured document or CCDA format. See Transmit Your Health Record as Clinical Data.

Print Your Health Record from the Patient Portal

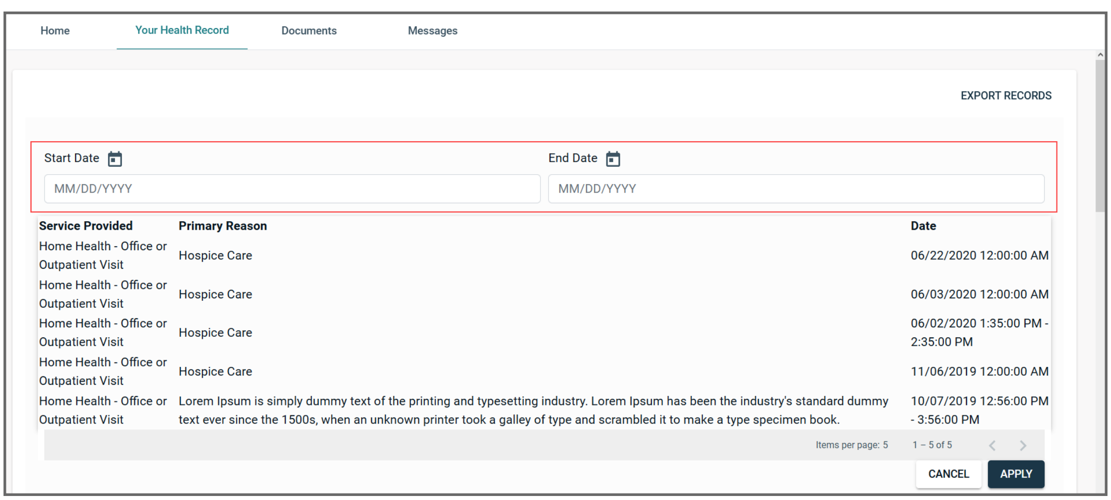
To print your Health Record, complete these steps.

1. Log in to the Patient Portal.
2. From the Patient Portal, click the **Your Health Record** tab in the top left.
3. If needed, enter a date range to view or export health information within a specific time frame.
   a. In the upper-right corner, click **APPLY DATE FILTER**.



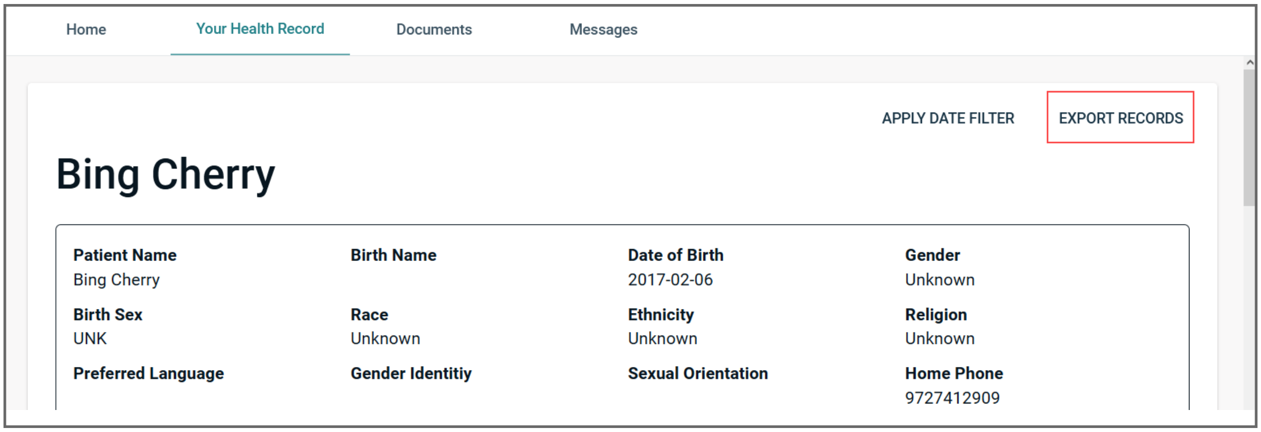
   b. Click the **Start Date** calendar ( ), then select a date from the calendar that displays. Next, repeat the same process for the **End Date**.

NOTE – A list of the most recent services displays to help you select a date range.

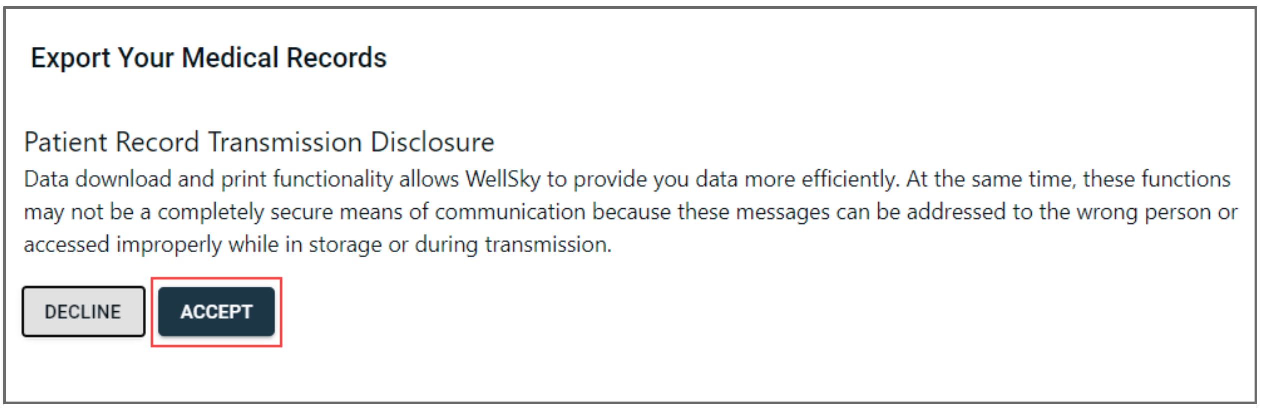


   c. In the lower right, click **APPLY** to save the date range.

4. In the upper right, click EXPORT RECORDS > Print.



5. Click ACCEPT.



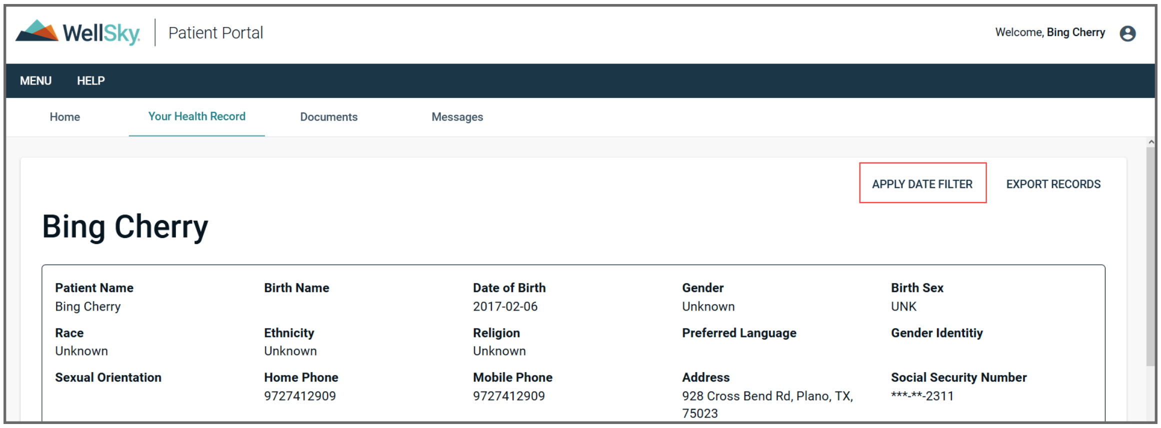
6. A print screen displays for you to print the records.

Download a PDF of Your Health Record from the Patient Portal

To download a PDF of your Health Record, complete these steps.

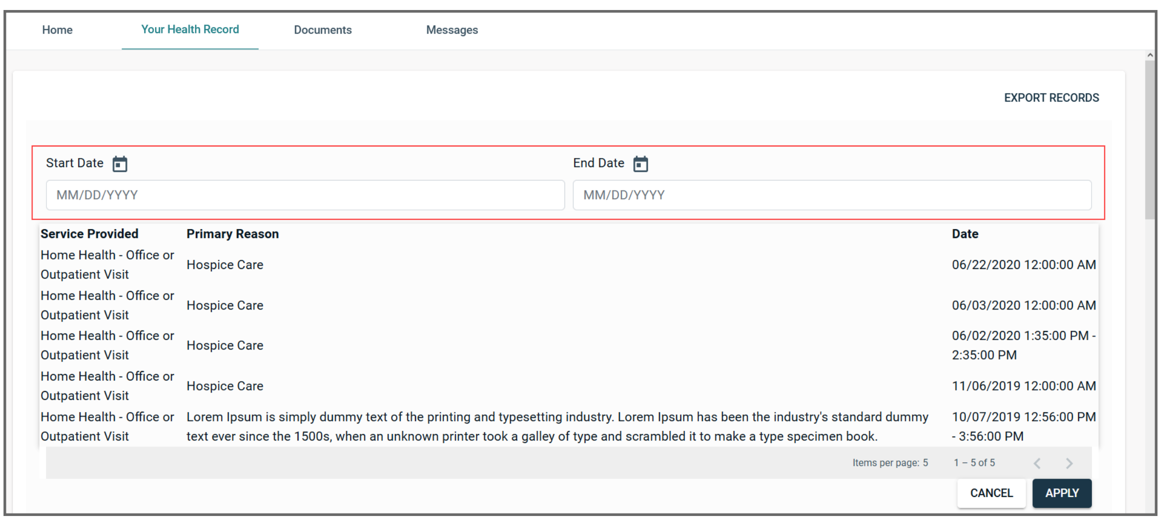
1. From the Patient Portal, click the **Your Health Record** tab in the top left.
2. If needed, enter a date range to view or export health information within a specific time frame.

   a. In the upper right, click **APPLY DATE FILTER**.



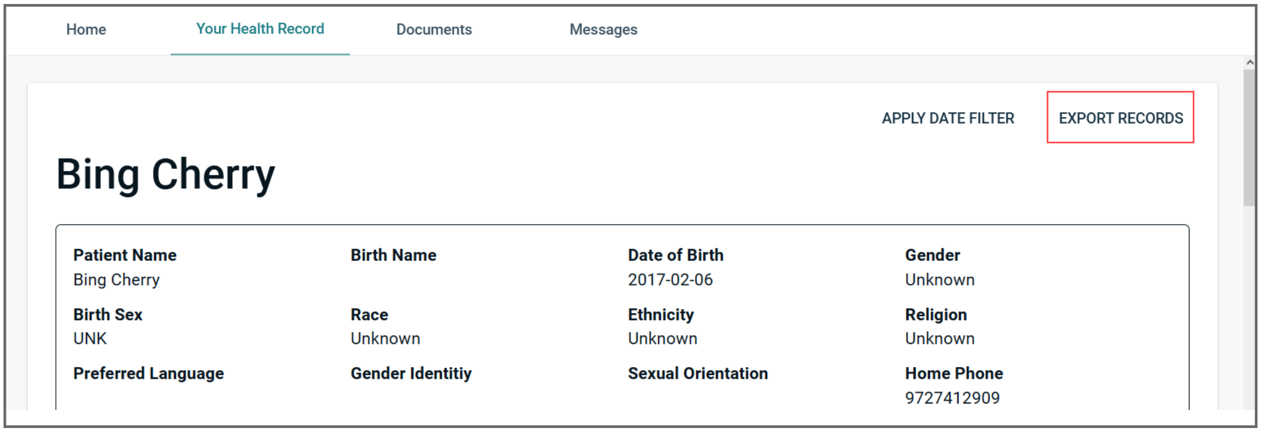
   b. Click the **Start Date** calendar (), then select a date from the calendar that displays. Next, repeat the same process for the **End Date**.

> **NOTE –** A list of the most recent services displays to help you select a date range.

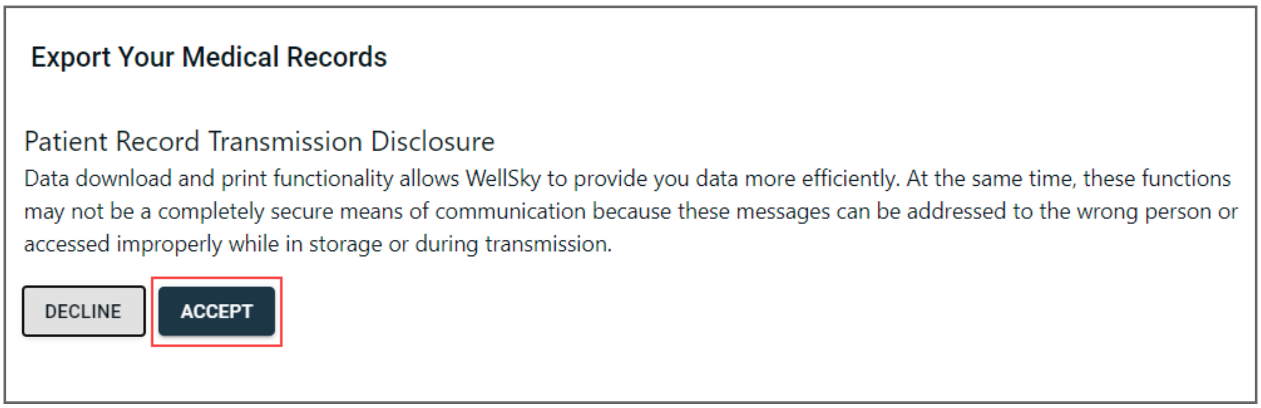


   c. In the lower-right corner, click **APPLY** to save the date range.

3. In the upper right, click **EXPORT RECORDS** > **Download PDF**.



4. Click **ACCEPT**.



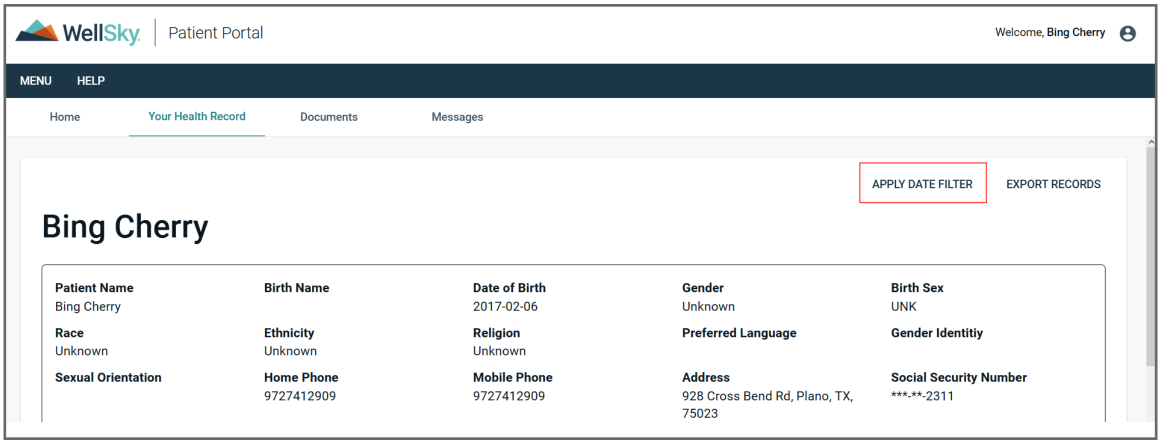
5. A new screen displays for you to create a PDF.

Download Your Health Record in CCDA Format from the Patient Portal

To download your Health Record in CCDA format, complete these steps.

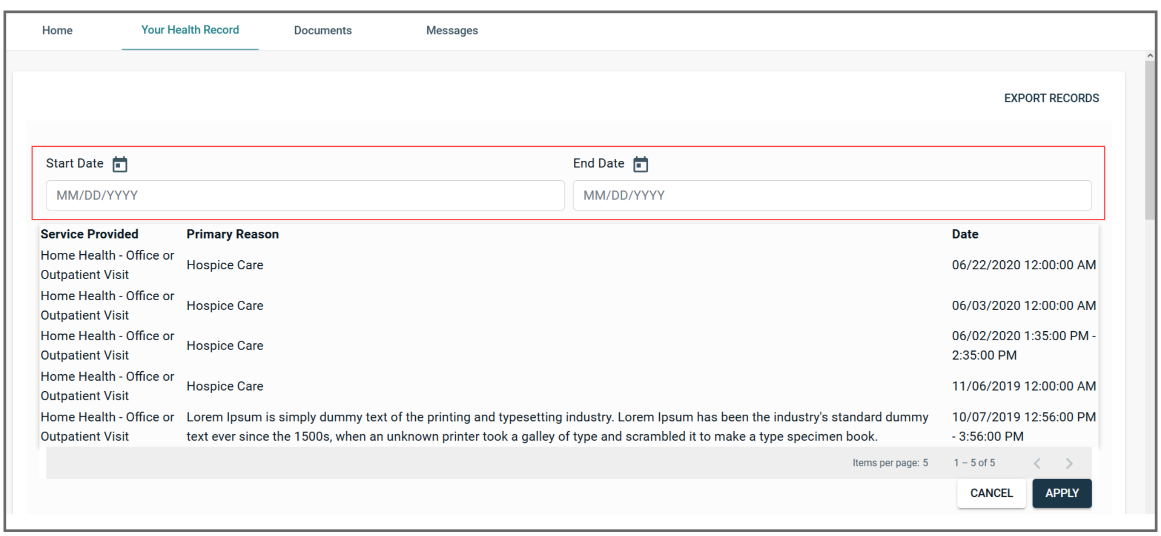
1. From the Patient Portal, click the **Your Health Record** tab in the top left.
2. If needed, enter a date range to view or export health information within a specific time frame.

   a. In the upper right, click **APPLY DATE FILTER**.



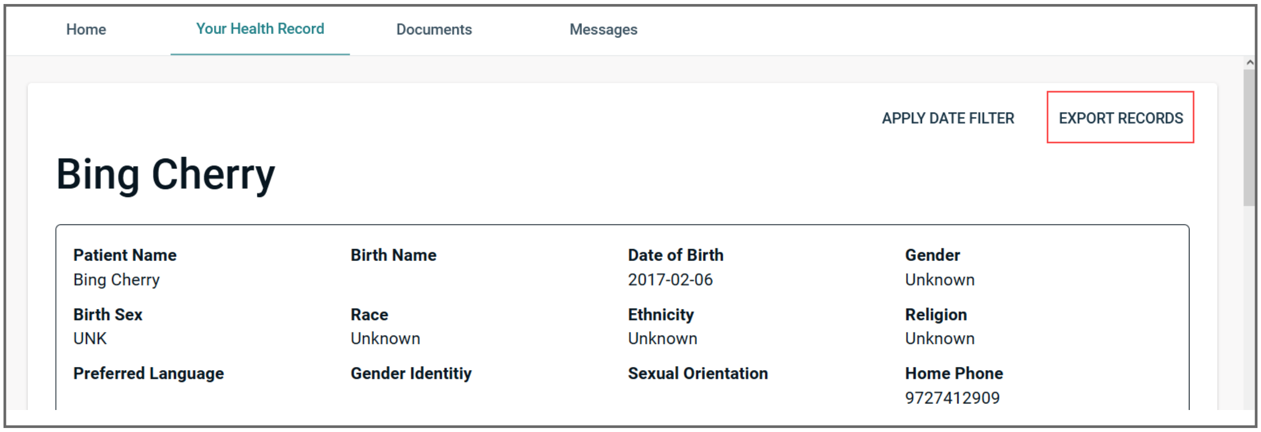
   b. Click the **Start Date** calendar ( ), then select a date from the calendar that displays. Next, repeat the same process for the **End Date**.

NOTE – A list of the most recent services displays to help you select a date range.

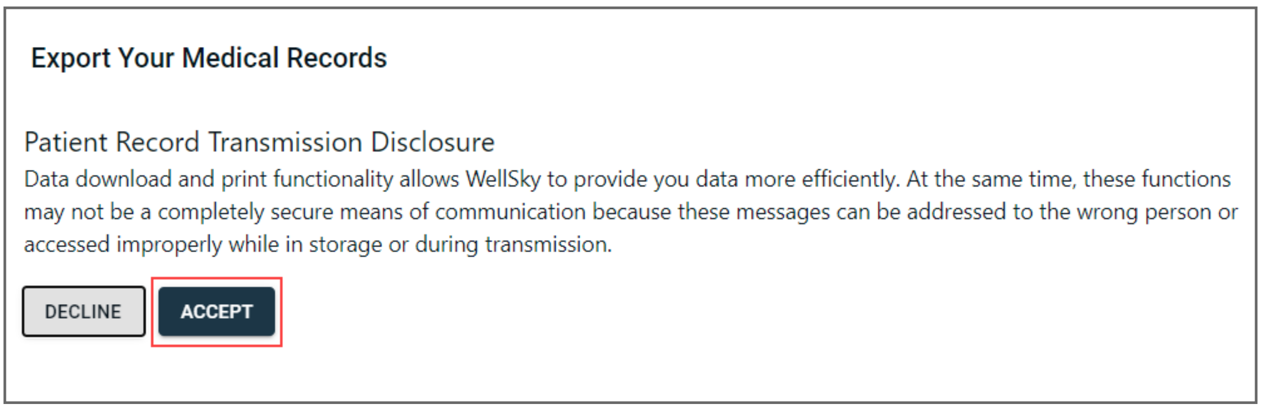


   c. In the lower-right corner, click **APPLY** to save the date range.

3. In the upper-right section, click **EXPORT RECORDS** > **Download Clinical Data**.



4. Click **ACCEPT**.



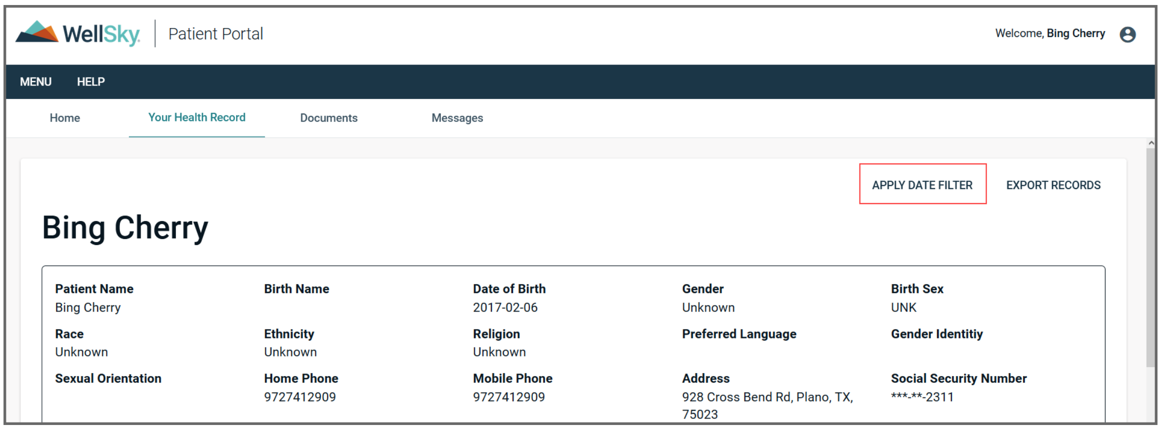
5. A zip file downloads to your computer for you to use as needed.

Transmit Your Health Record as Clinical Data from the Patient Portal

To transmit your Health Record via email, complete these steps.

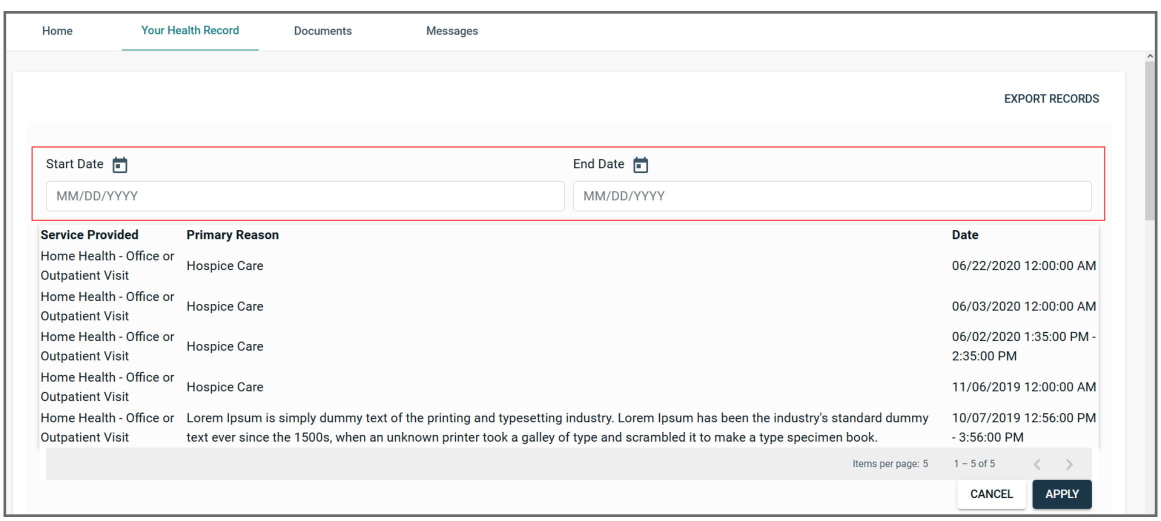
1. From the Patient Portal, click the **Your Health Record** tab in the upper left.
2. If needed, enter a date range to view or export health information within a specific time frame.

   a. In the upper-right corner, click **APPLY DATE FILTER**.



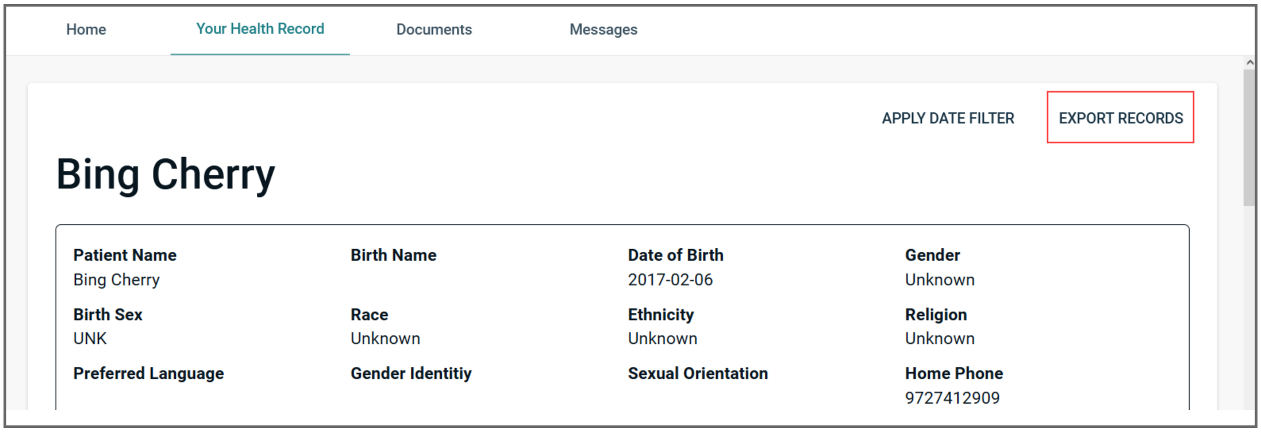
   b. Click the **Start Date** calendar ( ), then select a date from the calendar. Next, repeat the same process for the **End Date**.

NOTE – A list of the most recent services displays to help you select a date range.

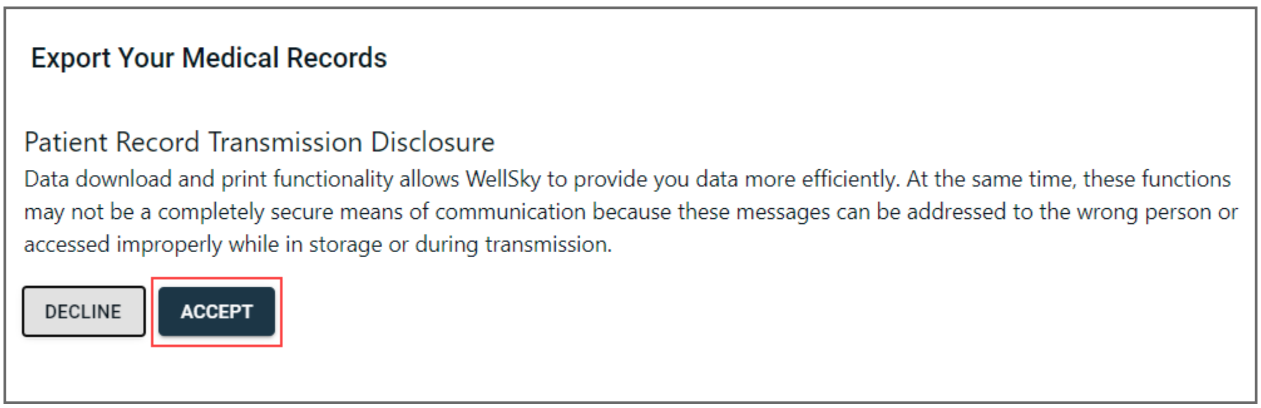


   c. In the lower-right corner, click **APPLY** to save the date range.

3. In the upper right, click EXPORT RECORDS > Transmit Clinical Data.



4. Click ACCEPT.



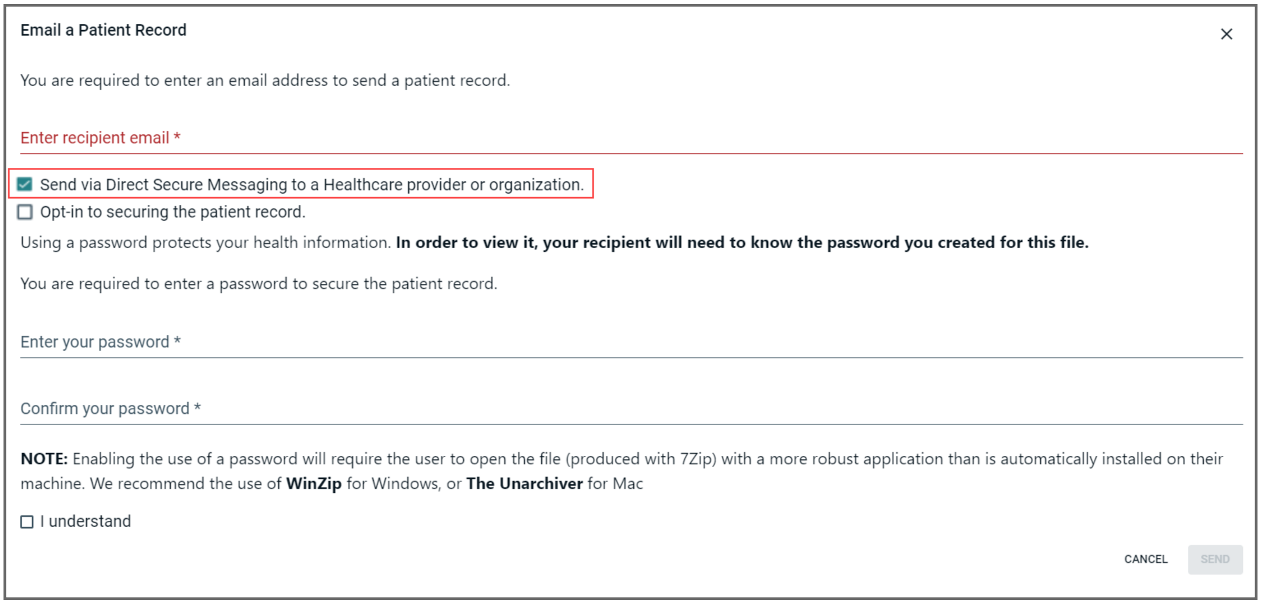
5. The Email a Patient screen opens. There are two options for transmitting clinical data.

   - Send to a Recipient Via a Direct Trust Address – Use this option to send your records to a health care provider or agency via a Direct Secure Message. Recipients must have a direct trust address. See Direct Trust.
   - Send to a Recipient Via a Standard Email – Use this option to send your records to a recipient who does not have a direct trust address but has a standard email address.

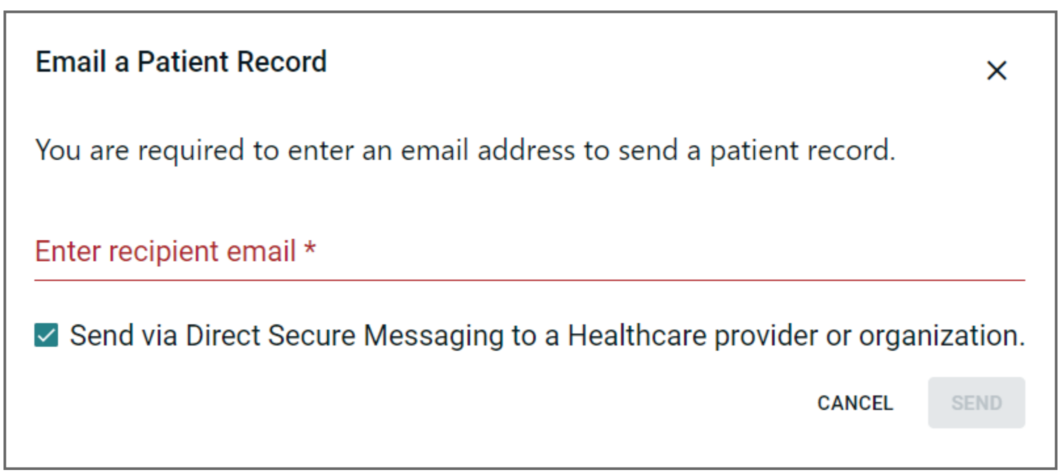
Send Your Health Record to a Recipient via Direct Trust Address

To send your Health Record to someone with a direct trust address, complete these steps.

1. On the Email a Patient Record screen, select the **Send via Direct Secure Messaging to a health care provider or organization** option.



2. On the Email a Patient Record screen, enter the recipient's direct trust address in the **Enter recipient email*** field.

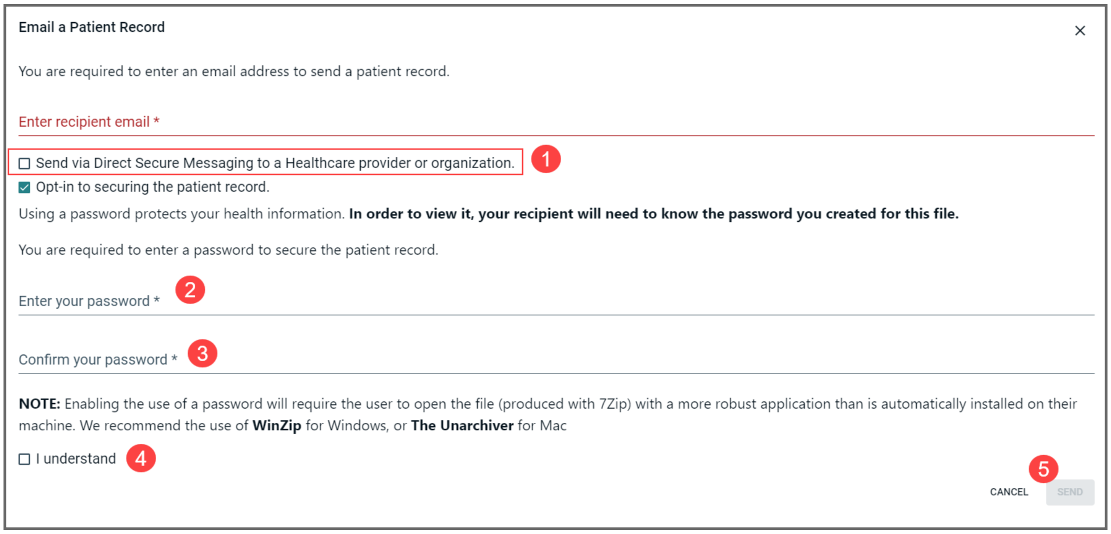


3. In the lower-right corner, click **SEND**.

Send Your Health Record to a Recipient Via Standard Email

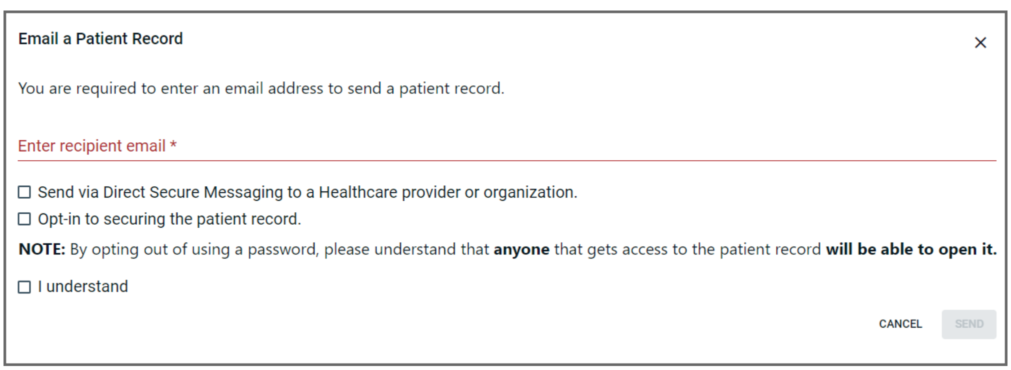
To send your Health Record as a zip file to someone with a standard email, complete the following steps.

1. On the Email a Patient Record screen, enter the recipient's email in the **Enter recipient email*** field.



Important! The *Opt-in to securing the patient record* option is automatically selected and requires a password to send the records.

If you choose to clear this option, this following screen displays and alerts you that you are opting out of using a password. If you do this, understand that anyone with access to your record can open it.



To continue, enter the email, select **I understand**, then click **SEND**.

If you choose not to do this, select **Opt-in to securing the patient record** to start over.

2. In the **Enter your password*** field, enter the password the recipient will use to open the file.

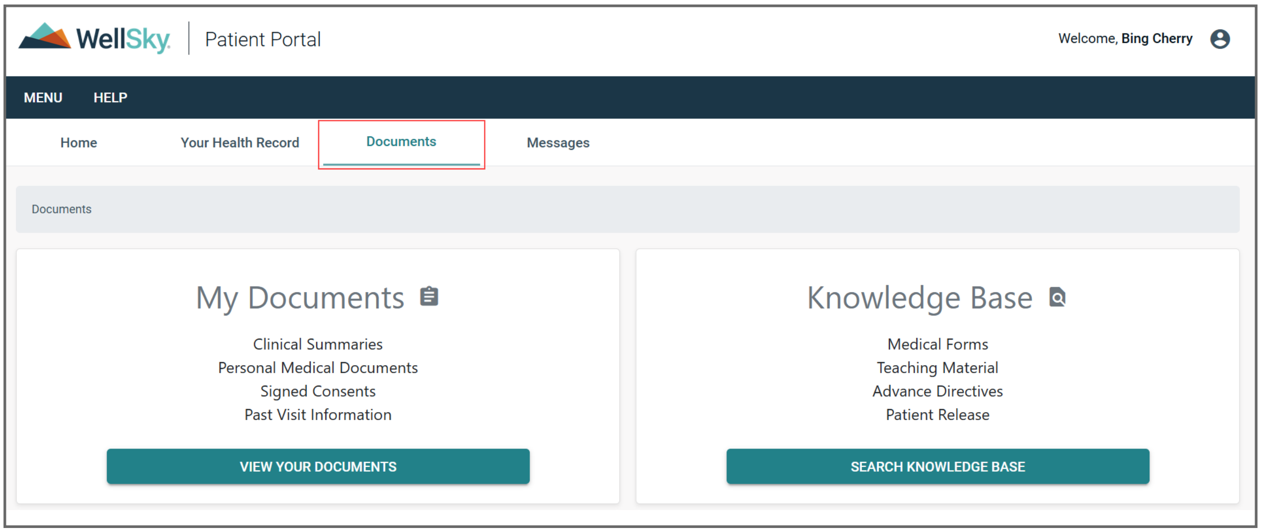
3. In the **Confirm your password*** field, reenter the password.

4. Select **I understand**.
5. In the lower right, click **SEND**.
6. Securely provide the password to the recipient so they can open the record once they receive it.

Documents Tab Overview

The Patient Portal's Documents tab contains documents your care provider entered in your medical record and shared with you in the portal and general documents the provider shared with all its patients.

Click **Documents** in the top left to open the information in this tab.



My Documents:

- These documents are specific to you.
- They flow from your medical record to the Patient Portal.
- Click **VIEW YOUR DOCUMENTS** to see the documents from your medical record that your care provider has shared with you. See View Documents in the Patient Portal.

Knowledge Base:

- These general documents are available to all patients.
- Click **SEARCH KNOWLEDGE BASE** to see agency documents your care provider has shared with you. See View Documents in the Patient Portal.

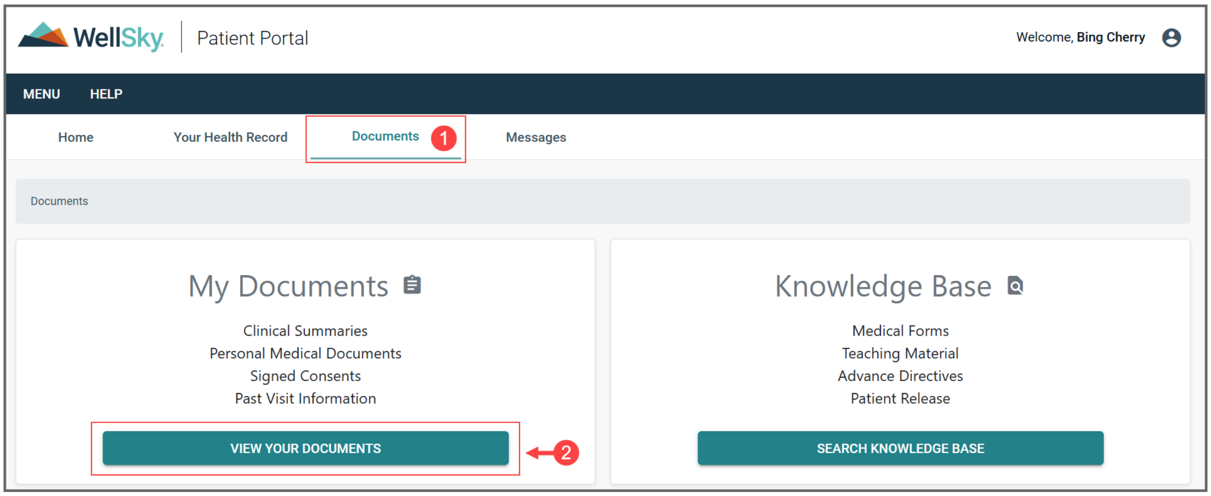
View Documents in the Patient Portal

You can view documents from your medical record or the agency's documents in the portal.

My Documents

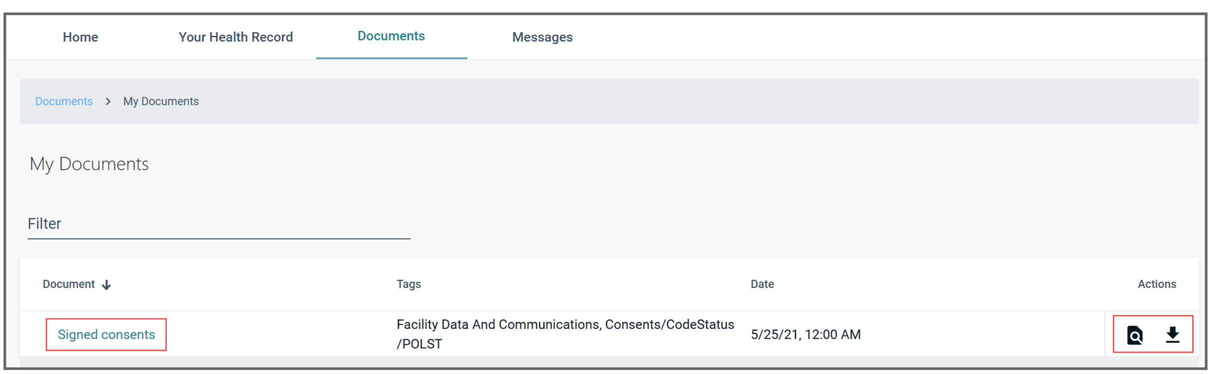
To view documents from your medical record that your care provider shared with you in the portal, complete the following steps.

1. From the Patient Portal, click the **Documents** tab in the upper left.

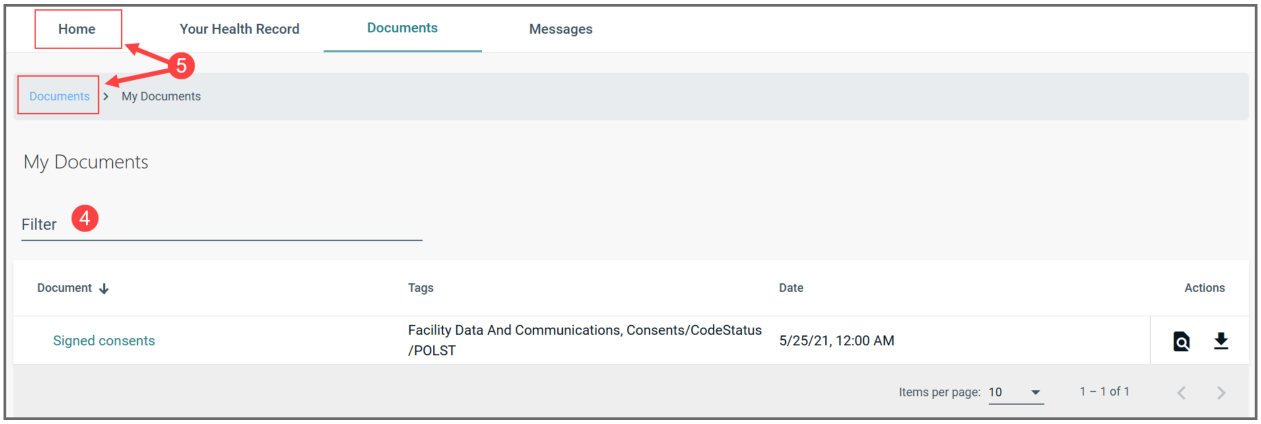


2. In the My Documents section, click **VIEW YOUR DOCUMENTS**.
3. On the My Documents page, do one of the following:

- In the Document column, click the document name (for example, Signed Consents) to view the document in a new tab. When done, close the tab and return to the portal.
- In the Actions column, click to preview the document
- In the Actions column, click to download the document to your device.



4. If needed, you can search for a document. Place your cursor in the Filter field, enter the document's name, then choose from the list that displays.

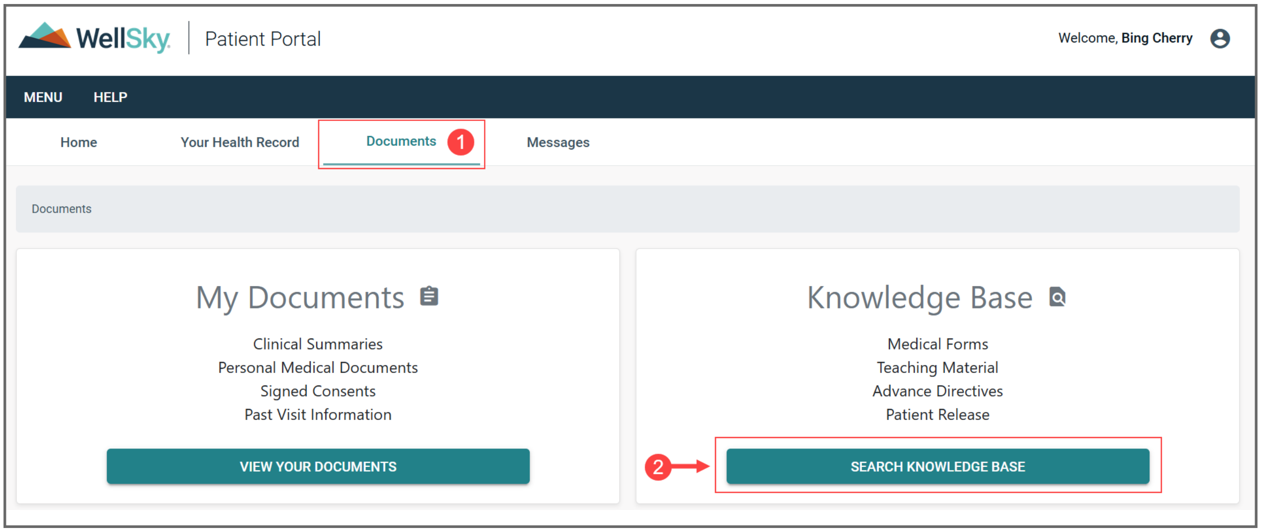


5. When done, either click the **Documents** breadcrumb to return to the Documents page or the **Home** tab to return to the portal Home page.

Knowledge Base

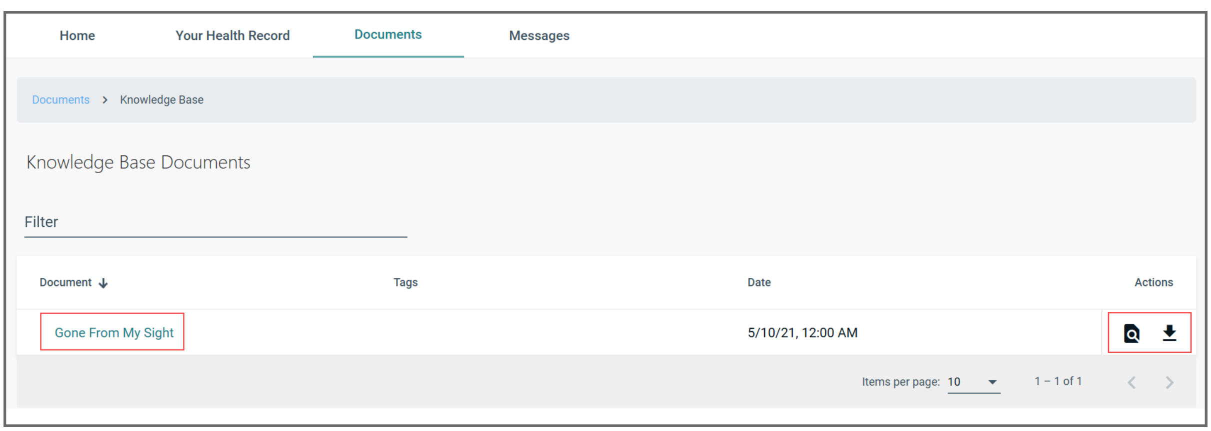
To view documents the agency has shared with all patients in the portal, complete the following steps.

1. From the Patient Portal, click the **Documents** tab in the upper-left section.

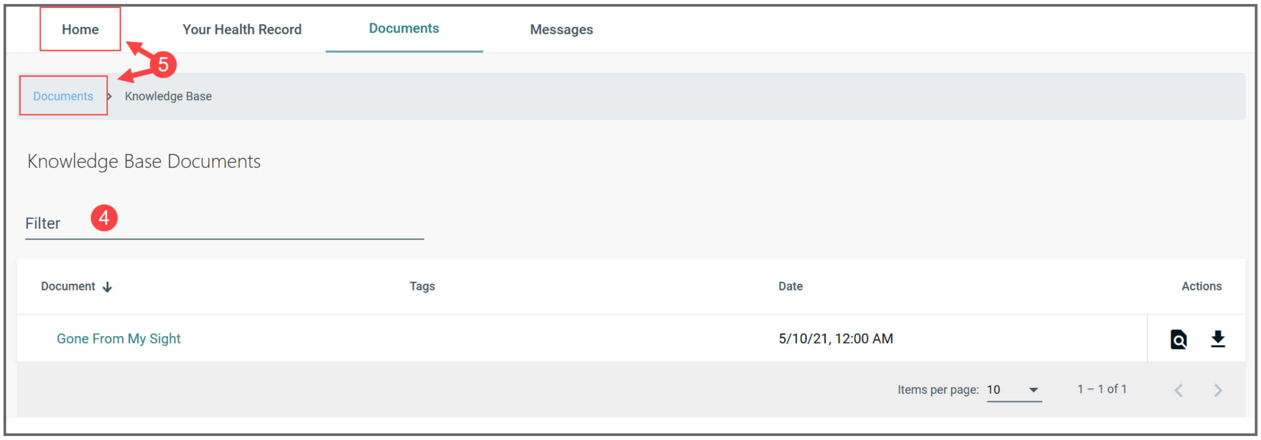


2. In the My Documents section, click **SEARCH KNOWLEDGE BASE**.
3. On the Knowledge Base page, do one of the following:

- In the Document column, click the document name (for example, Gone From My Sight) to view the document in a new tab. When done, close the tab and return to the portal.
- In the Actions column, click to preview the document
- In the Actions column, click to download the document to your device.



4. If needed, you can search for a document. Place your cursor in the **Filter** field, enter the document's name, then choose from the list that displays.



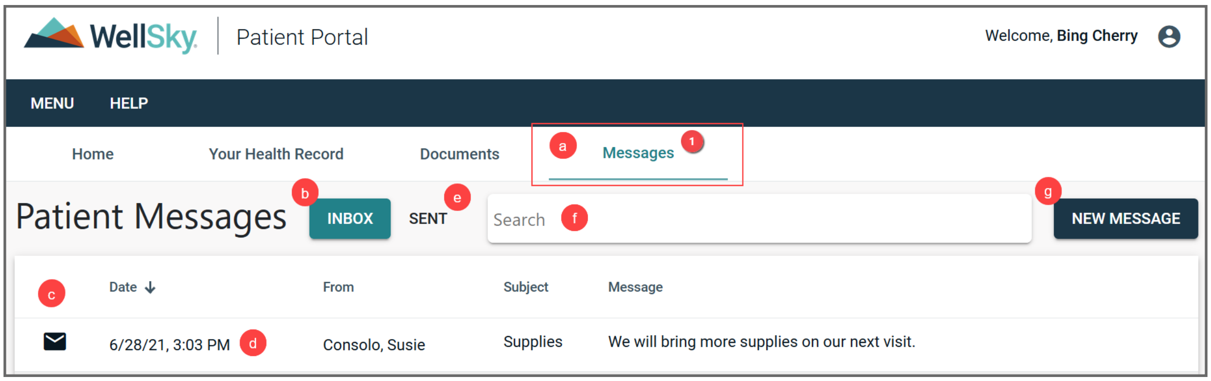
5. When done, either click the **Documents** breadcrumb to return to the Documents page or the **Home** tab to return to the portal Home page.

Messages Tab Overview

The Patient Portal's Messages tab is a secure communication location with your care team.

Important! Do not send urgent, critical, or time sensitive communication via messages in the Patient Portal.

a. Click **Messages** at the top to open the information in this tab (the number displayed on the Messages tab indicates the number of unread messages, such as 1 in this picture).



b. The **INBOX** option is selected by default (these are messages received from the agency).

c. The messages display in the table.

- **Unread Messages** – Unread messages display the icon on the left.
- **Date** – This is the date the message was sent.
- **From** – The person who sent the message.
- **Message** – The message includes the subject and the message sent to your care team.

NOTE – By default, the table is sorted by the Date column. Click a different column header to sort the table by that criteria.

d. Click a message to open it and view the contents.

e. At the top, click **SENT** to view messages you sent to your care team. See View Messages Sent to Your Care Provider.

f. Use the **Search** messages filter to find a specific message or narrow the results displayed in the table if needed.

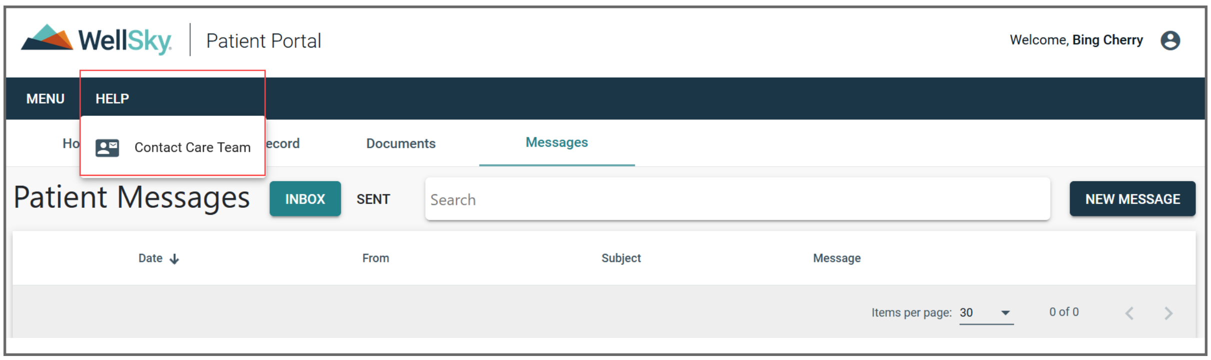
g. On the right, click **NEW MESSAGE** to send a new message to your care team. See Send a Message to Your Care Team.

Send a Message to Your Care Team

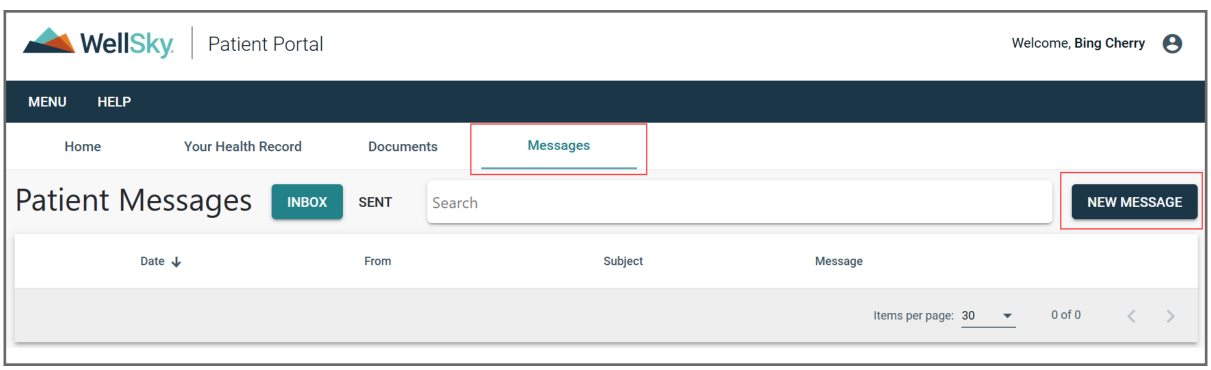
Important! Do not send urgent, critical, or time sensitive communication via messages in the Patient Portal.

To send a message to your care team, complete these steps.

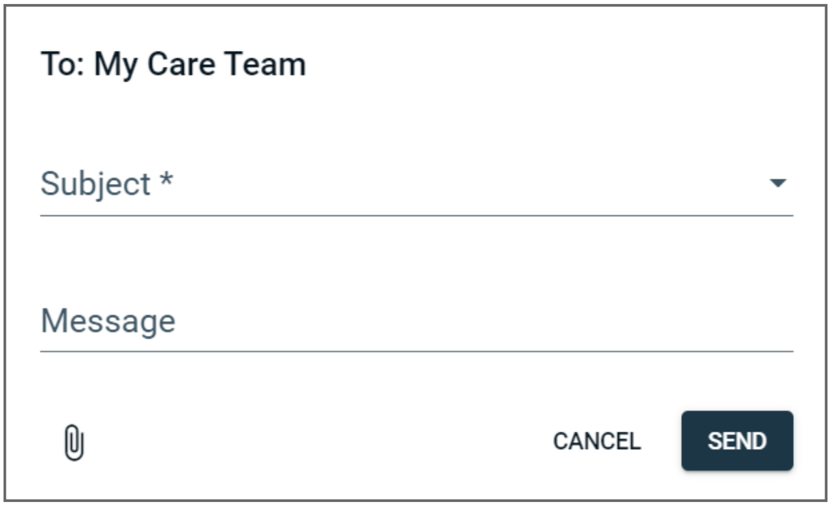
1. From the Patient Portal, do one of the following in the top left:
   - Click HELP > Contact Care Team.



   - Click Messages, then on the Patient Inbox screen, click NEW MESSAGES.



2. On the To: My Care Team screen, select an option from the **Subject*** drop-down list.
    - If you select **Other** from the drop-down list, another field called *Subject* displays for you to enter a custom subject.



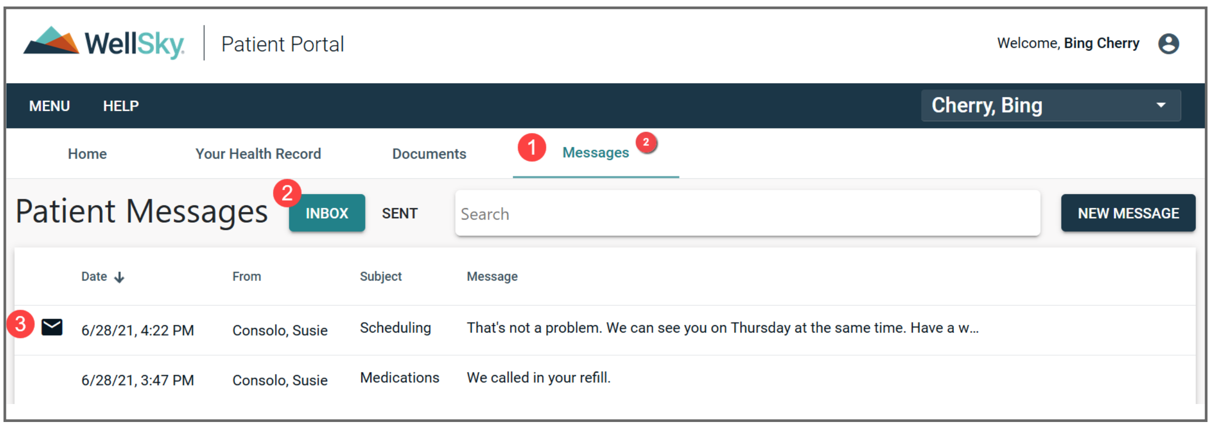
3. Place your cursor in the **Message** box, then type your message.
4. If needed, click to open your computer files, then select an attachment to send with your message.
5. Click **SEND**.
6. A confirmation message displays.

View or Reply to Messages

NOTE – You must complete your registration to view and reply to messages in the Patient Portal or receive email notifications when your care team sends a message.

To view messages received from your care provider, complete these steps.

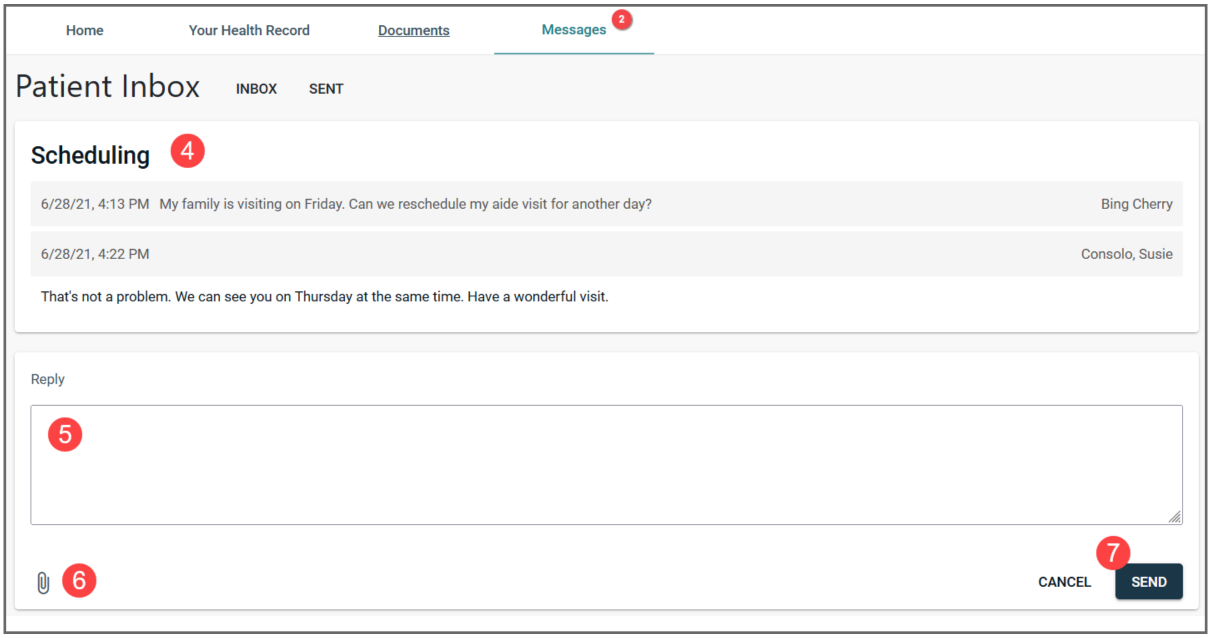
1. Do one of the following:
   - Select the link in the email notification indicating you have a new message.
   - From the Patient Portal, click the **Messages** tab at the top of the screen.



2. INBOX should be selected by default. If not, click **INBOX** to display the messages received from your care team.
3. Click a message in the table to open it and view the contents.

NOTE – Unread messages display the icon on the left.

4. The message from your care team displays at the top. In this example, the patient (Bing) sent the first message to the agency, and the second was the agency's response (from Susie).

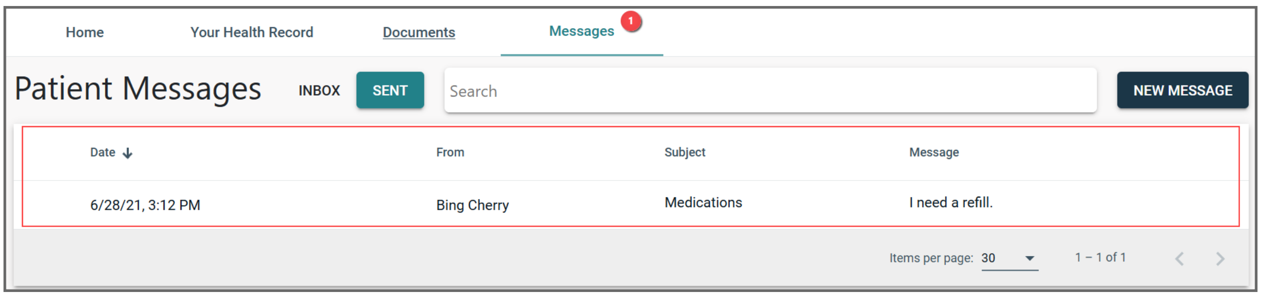


5. If you need to respond to the care team, enter a message in the **Reply** box.
6. If needed, click to select a file from your computer to include with your reply.
7. In the lower right, click **SEND**.

View Messages Sent to Your Care Provider

To view messages you or your representative sent to your care provider, complete these steps.

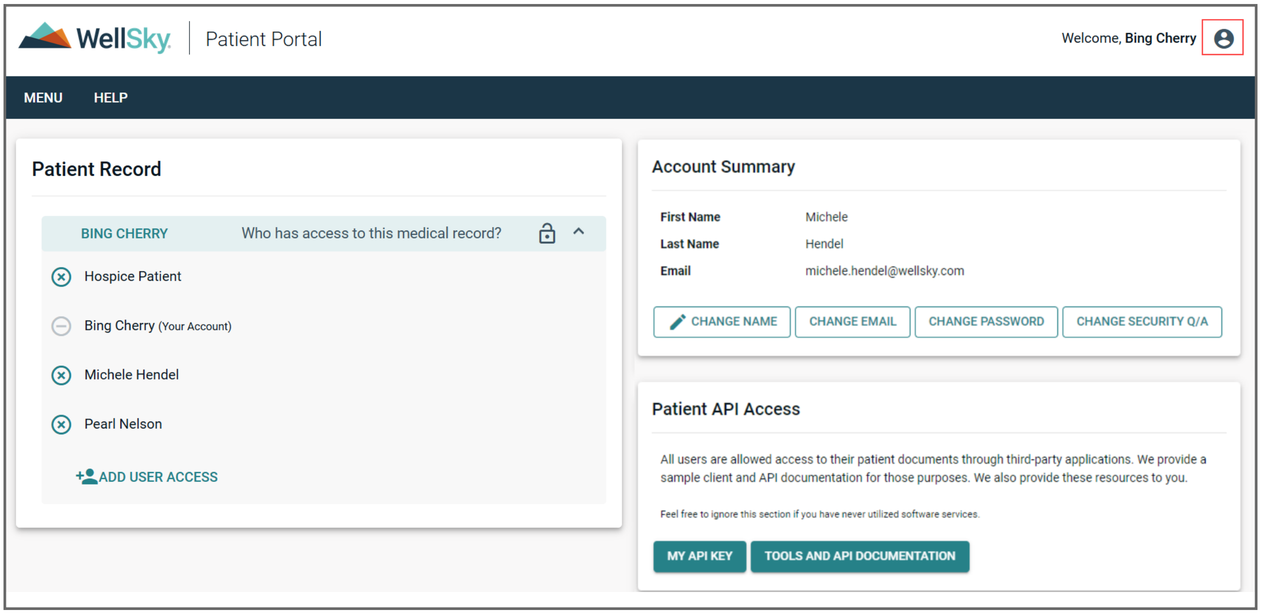
1. From the Patient Portal, click **Messages**.
2. Click **SENT** at the top.
3. Messages display in the table. Click a message to open it and view the contents.
   - **Date** – This is the date the message was sent.
   - **From** – The person who sent the message.
   - **Subject** – The subject of the message.
   - **Message** – The message sent to the agency staff.



4. In this example, the first message (from Bing) went to the agency, and the second message (from Susie) was their response.

My Account Overview

Your patient portal account includes information about portal access, account information, and API tools. Click > **My Account** in the upper-right corner to view this information.



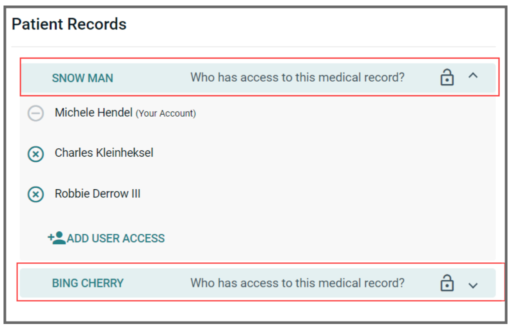
The account page contains three sections:

- Patient Record
- Account Summary
- Patient API Access

Patient Record

The Patient Record section includes the following:

- The patients' portals you have access to and others who have access to the same portals.
  - In the previous picture, the patient Bing Cherry only has access to their Patient Portal.
  - If Bing has access to other portals, they will display in this section, one after another, as shown below. In this example, Bing has access to his portal and Snow Man's. If needed, click ⌄ to view who has access to this portal or ^ to close the section.



- The options to give other people access or remove them from the patient portal (if properly configured) are denoted by the **ADD USER ACCESS** and ⊗ options.
- Click the **Patient's Name** to return to the Home tab.

Account Summary

The Account Summary section includes your name and email address and the following options:

- Change your name
- Change your email
- Change your password
- Change your patient portal security questions

Patient API Access

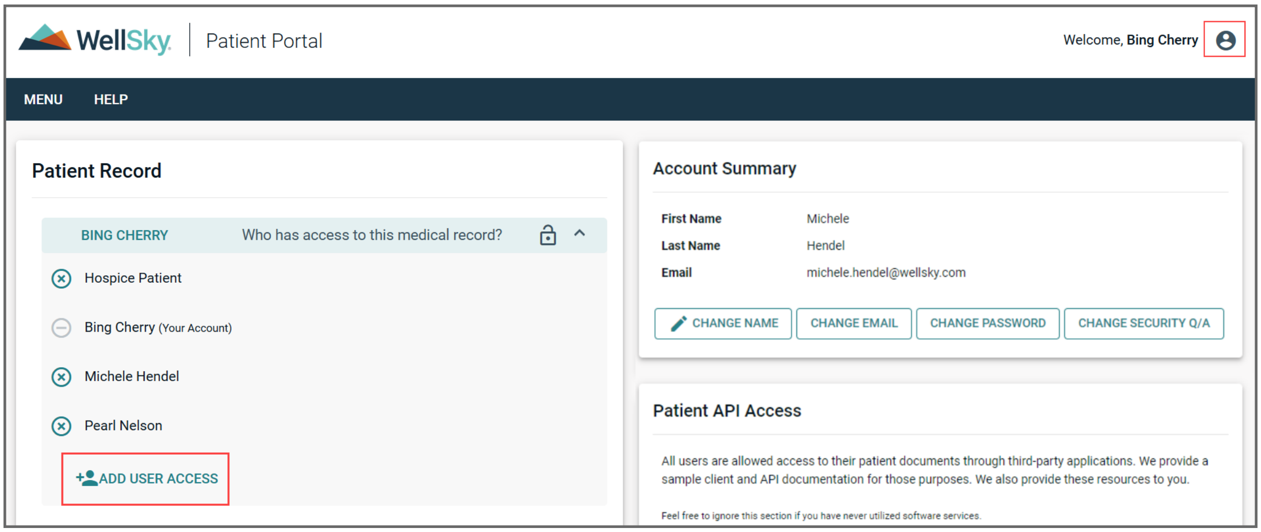
The Patient API Access section includes the following:

- The option to generate a new API key. See Generate an API Key.
- How to independently access your health data using WellSky Hospice and Palliative APIs. See Access Tools and API Documentation.

Grant Access to Your Health Record

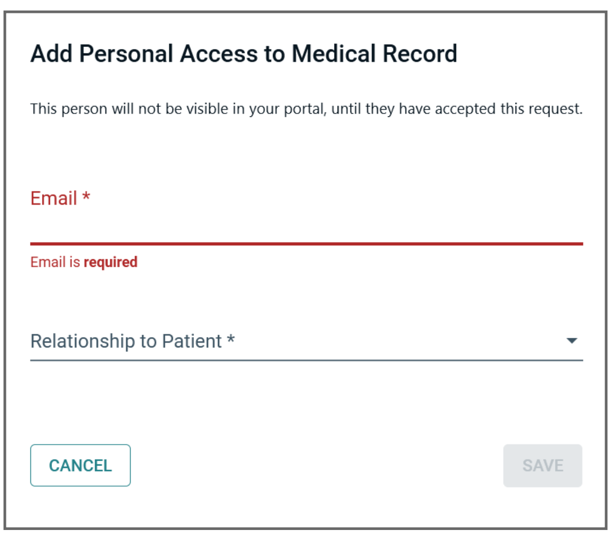
To grant another person access to your health record, you must invite them to sign up by completing the following steps.

1. From the Patient Portal, click > **My Account** in the top-right corner.
2. In the Patient Record section, click **ADD USER ACCESS**. If you do not see this option, click to the far right of the patient's name.

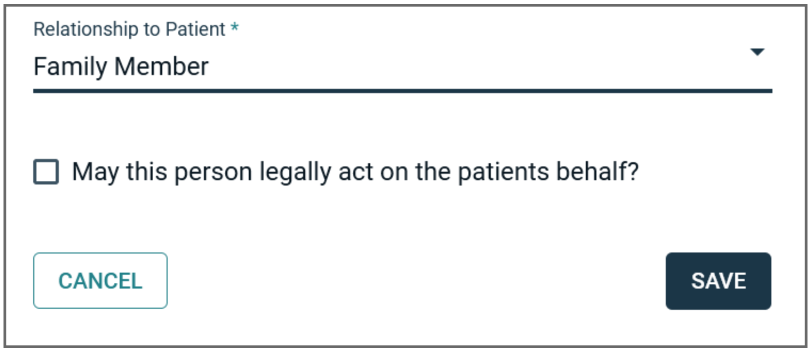


Important! If you do not see **ADD USER ACCESS**, it means you do not have the authority to complete this action. Speak to the patient or their representative.

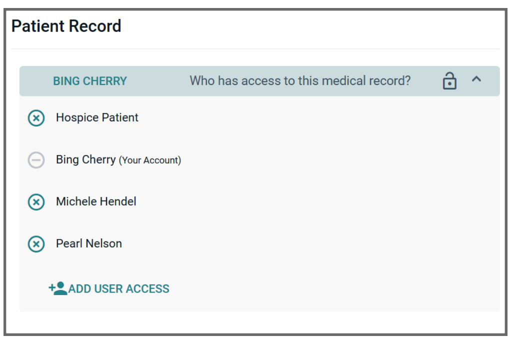
3. On the Add Personal Access to Medical Record screen, enter the user's email in the **Email*** field.



4. Select an option from the **Relationship to Patient*** drop-down list.
5. Once the email and relationship are selected, another option may display. If needed, select **May this person legally act on the patients behalf?**.



Important! Selecting this option will allow the person to grant or remove others' access to your Patient Portal, denoted by the ADD USER ACCESS and ⊗ options.



6. Click **SAVE**.

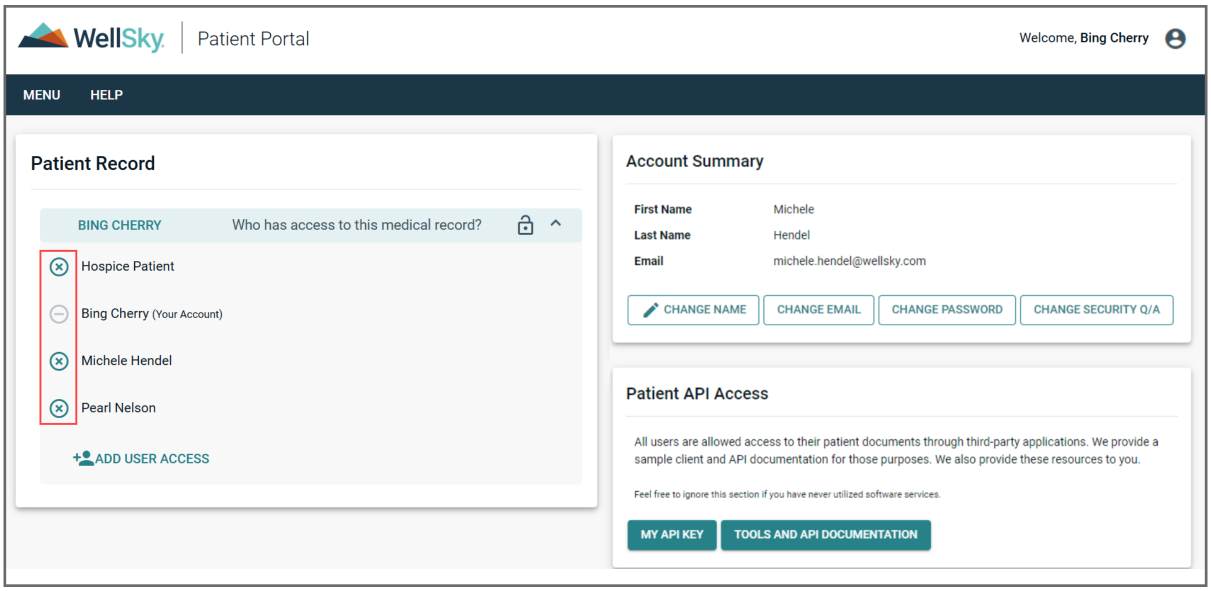
NOTE – If this is the first patient record this person is accessing, have them [register to use the patient portal](). If it is another patient record for a different individual, have them [complete the signup process to accept this request]().

Remove a Person's Access to Your Health Record

To remove a person's access to your Health Record via the Patient Portal, complete the following steps.

1. From the Patient Portal, click > **My Account** in the top-right corner.
2. In the Patient Record section, find the person whose access you want to remove, then click to the left of their name.

> **TIP –** If you do not see this option or any names, click to the far right of your name to display the names of those who have access to your Health Record.



> **Important!** If you do not see an , it means you do not have the authority to complete this action. Speak to the patient or their representative.

3. On the confirmation screen, click **OK**. The person will immediately be removed from the list and access terminated.

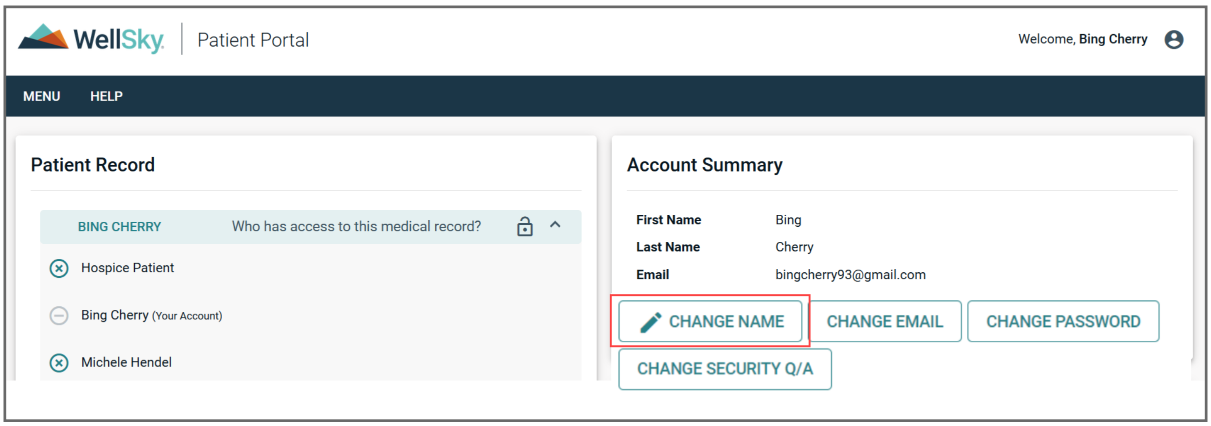
> **NOTE –** If this person needs access later, you can send a new registration email.

Change Your Name

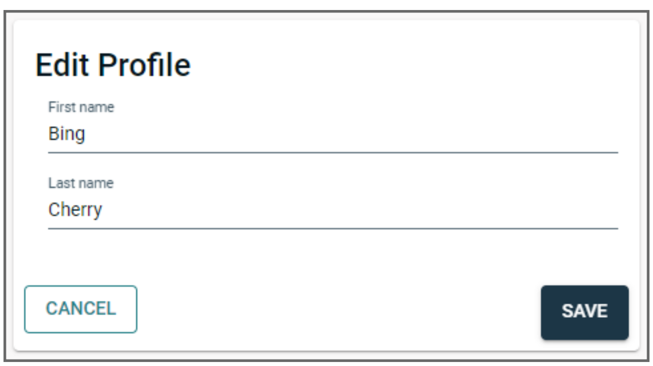
NOTE – This will change the name of the portal account user. It will not change the patient's name in their medical record. If you need to do that, send a message to the care team with *Amendment* in the subject.

To change your name in the Patient Portal, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Account Summary section, click **CHANGE NAME**.



3. On the Edit Profile screen, enter a new **First name**, **Last name**, or both.

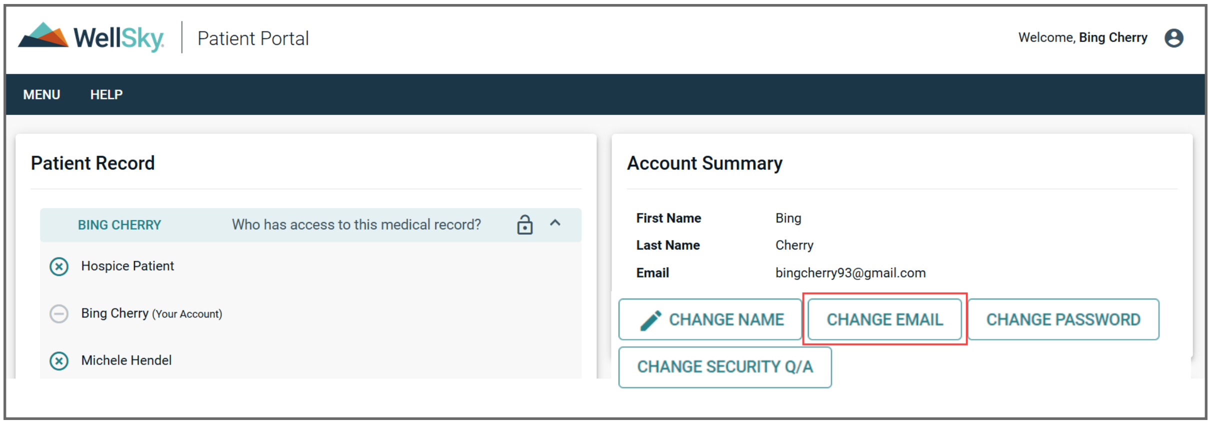


4. Click **SAVE**.

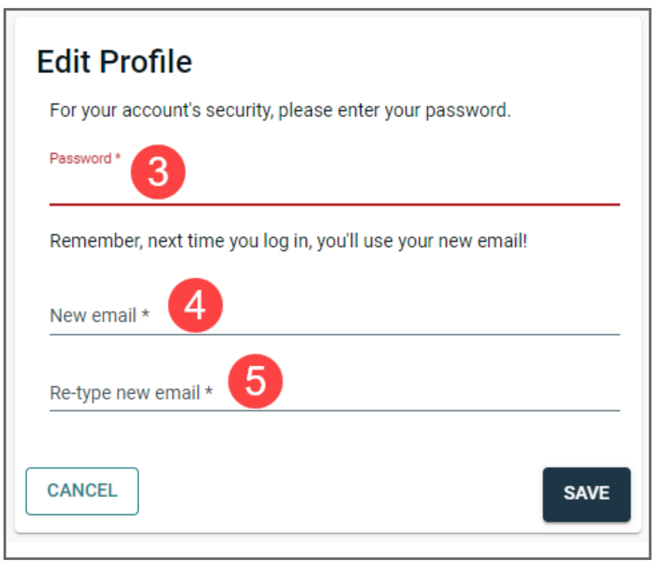
Change Your Email

To change your email in the Patient Portal, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Account Summary section, click **CHANGE EMAIL**.



3. On the Edit Profile screen, enter your password in the **Password*** field.

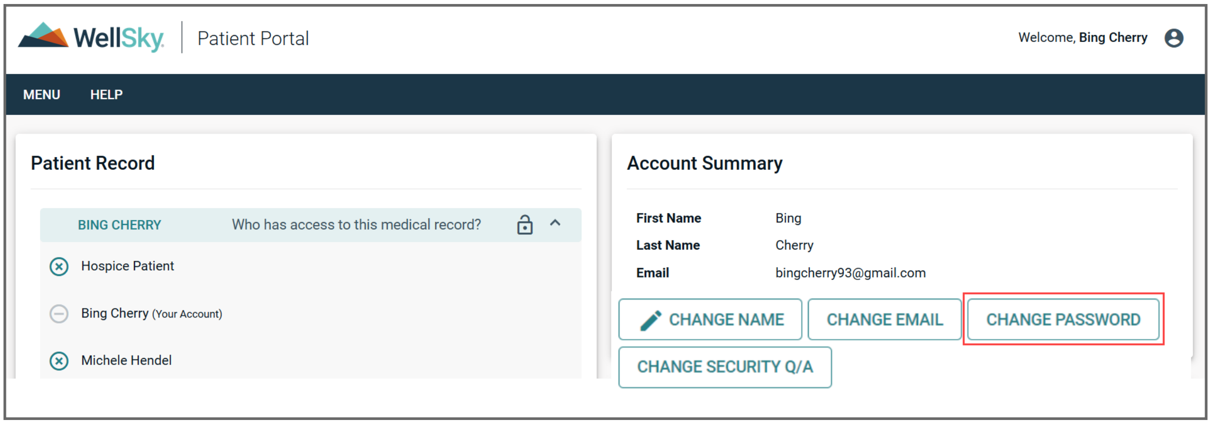


4. Enter your new email in the **New email*** field.
5. Re-type your new email in the **Re-type new email*** field.
6. Click **SAVE**.

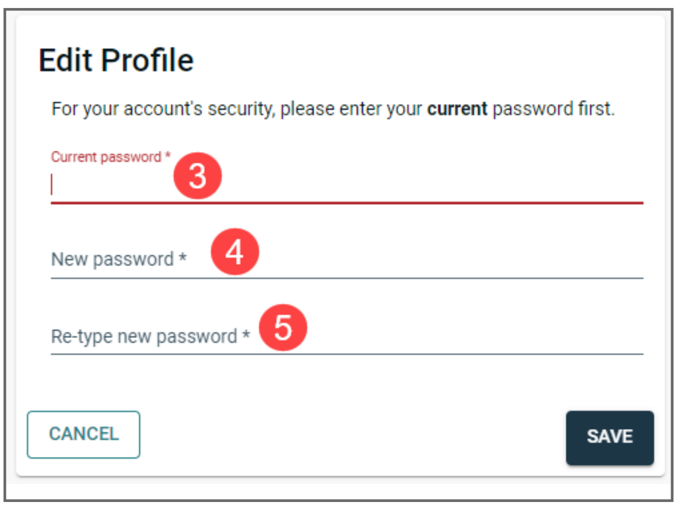
Change Your Password

To change your Patient Portal password, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Account Summary section, click **CHANGE PASSWORD**.



3. On the Change Password screen, enter your current password in the **Current password*** field.



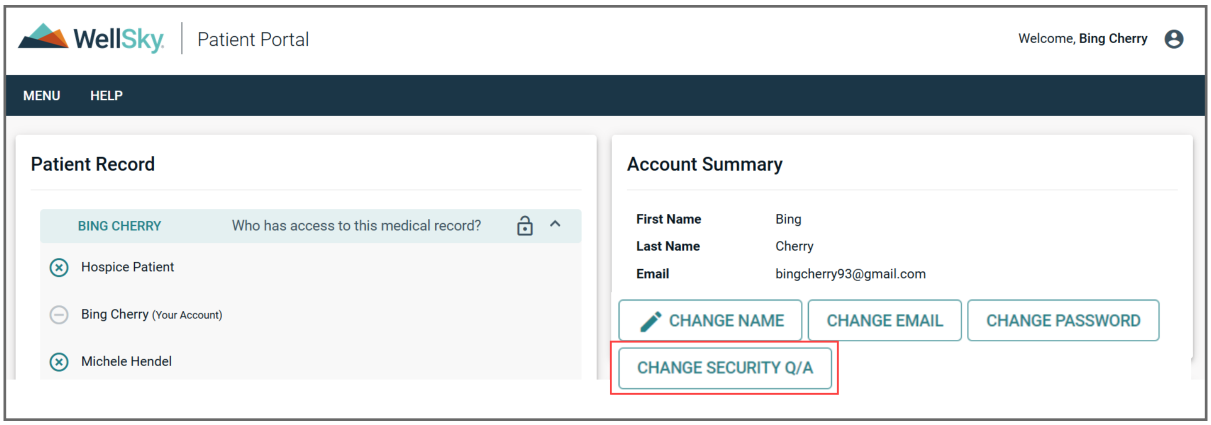
4. Enter a new password in the **New password*** field.
5. Re-type the new password in the **Re-type new password*** field.
6. Click **SAVE.**

Change Your Security Questions

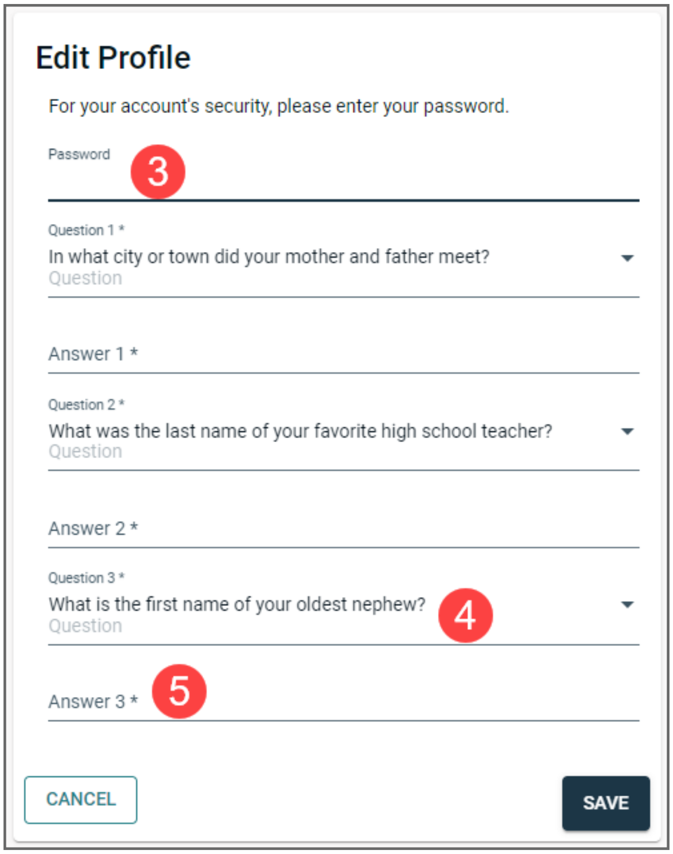
NOTE – Your security questions are used to unlock your Patient Portal account. For example, you forget your password or enter an incorrect password or user name too many times. Only you can see your security questions and answers.

To change your Patient Portal security questions, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Account Summary section, click **CHANGE SECURITY Q/A**.



3. On the Edit Profile screen, enter your password in the **Password** field.



4. Find the current **Question** you want to change, then select a new question from the drop-down list, such as Question 3* in this example.
5. Enter a new answer for the selected question in the corresponding **Answer** field.

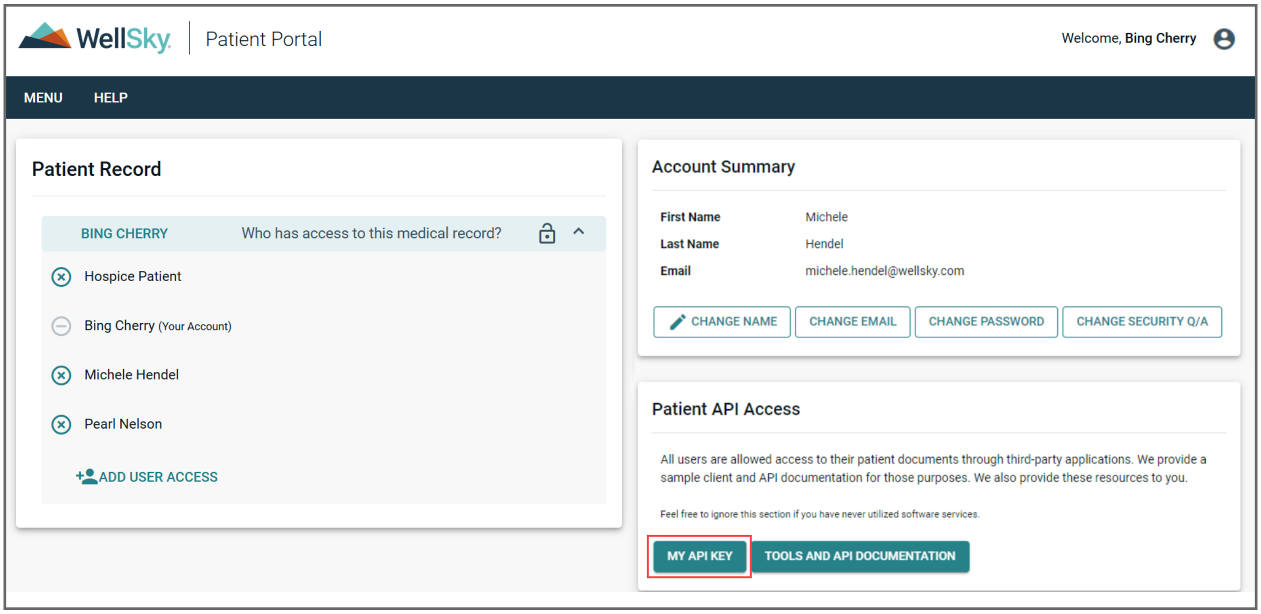
> **Important!** There is a 5 character minimum.

6. Repeat this process for either or both of the other questions and answers if needed.
7. Click **SAVE** to save the updates to your security questions.

Generate an API Key

To generate an API key, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Patient API Access section, click **My API Key**.

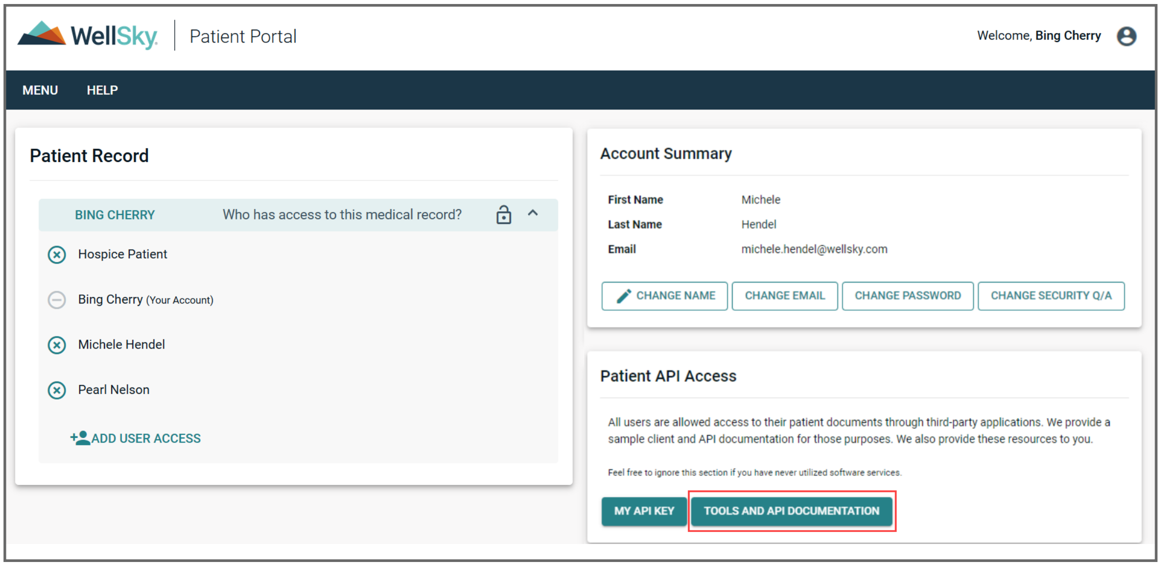


3. On the My API Key screen, click **Generate**.

Access Tools and API Documentation

To access the WellSky Hospice and Palliative Tools and API documentation, complete these steps.

1. From the Patient Portal, click > **My Account** in the upper-right corner.
2. In the Patient API Access section, click **Tools and API Documentation**.



3. On the WellSky Hospice and Palliative Consolo API page, click a link to open another page with information about that item, including the Request, Parameters, and Response.

Other Patient Portal Features

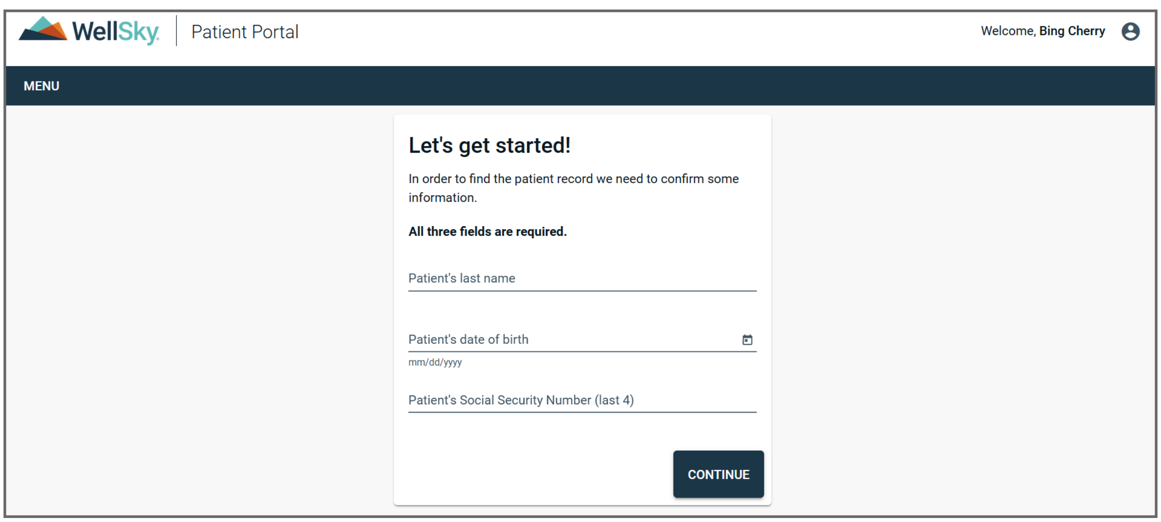
In this section, you can review the following:

- Grant access to your Health Record
- Complete signup to access another patient's Health Record
- Remove a person's access to your Health Record
- View a history of activity in your Health Record
- Reset your Patient Portal password
- Log out of the Patient Portal

Complete Signup to Access Another Patient's Health Record

You can access each patient's health record if multiple loved ones receive care from the same agency. Once the patient grants you access, complete the following steps.

1. Do one of the following:
   - Open the WellSky email with the subject *Patient Portal Signup*, then click the link in the email.
   - Log in to the Patient Portal with your existing username and password for the Patient Portal.
2. In the upper left, click **MENU** > **New Patient Signup**.
3. On the Patient Portal screen, enter the following patient information:
   - **Patient's last name** – Enter the patient's last name.
   - **Patient's date of birth** – Either click and select a date from the calendar, or manually enter the date (mm/dd/yyyy format).
   - **Social security number (last 4)** – Enter the last four digits of the patient's social security number.

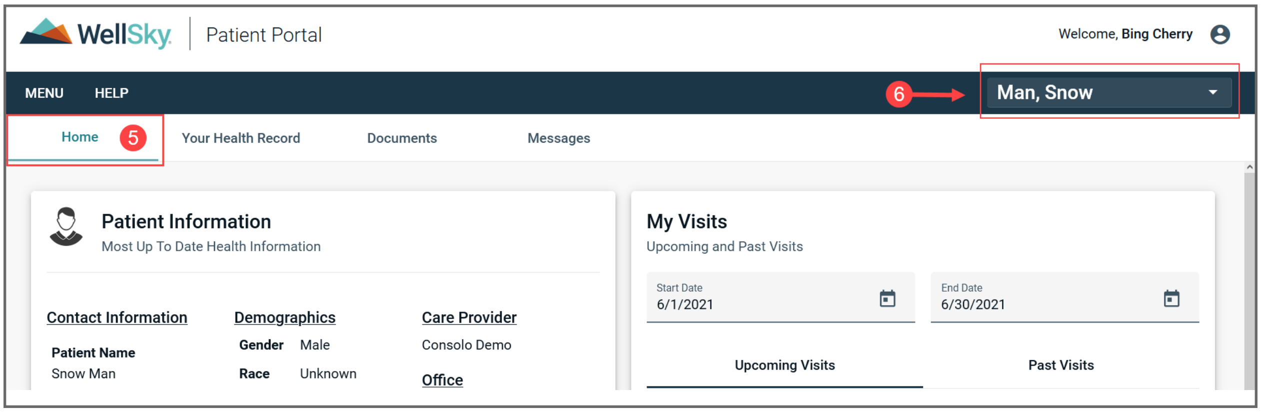


NOTE – If you came to this page in error, in the upper left click **MENU** > **Patient Home** to return to the patient's Home tab.

4. Click **CONTINUE**.

> **NOTE –** If you have registration issues, ensure your data is entered correctly. You will receive an error if you attempt to set up your account too many times. Wait the specified amount of time, then try again. If you continue to have issues, contact the agency.

5. The patient's Health Record opens to the Home tab.



6. Select a name from the drop-down list in the upper-right corner to switch between patient portals.

> **EXAMPLE –** In this example, Bing Cherry is logged in to their portal (their name displays in the top-right corner). Bing now also has access to Snow Man's portal as Snow's name is selected in the drop-down list on the Menu bar.
>
> Whichever name displays in this drop-down list indicates which patient's Health Record information is being displayed. In this case, Snow Man's name is selected and their information is displaying in the Home tab.

> **NOTE –** This drop-down list only displays if you have access to multiple patient portals. To see which portals you have access to, click > **My Account** in the upper-right corner. See View Your Account Details.

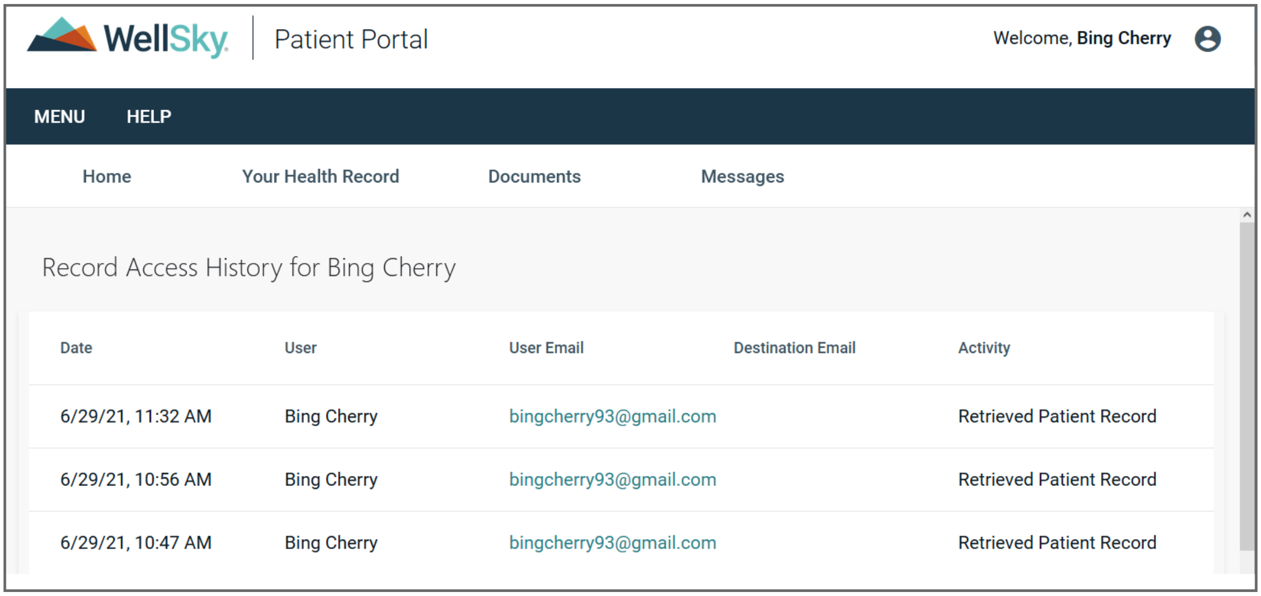
7. Bookmark the website to return to this patient's Health Record when needed.

8. When you log in to the Patient Portal next time, use the same email and new password you created to log in.

View Health Record Access History

To view a summary of people who have accessed your health record, complete these steps.

1. From the Patient Portal, click **MENU** > **Patient Activity Log** in the upper left.
2. The results display in the Record Access History table.



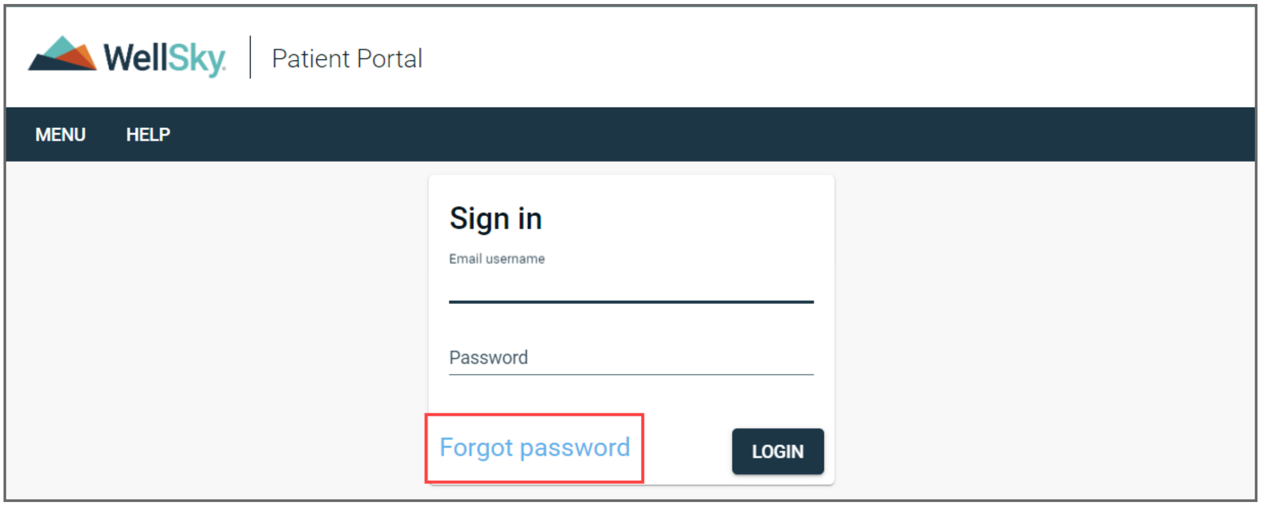
Column Headers

- **Date** – The date and time of the activity in the portal.
- **User** – The name of the person who accessed the portal.
- **User Email** – The email of the person who accessed the portal.
- **Destination Email** – If applicable, the email where the records were transmitted.
- **Activity** – The type of information that was accessed.

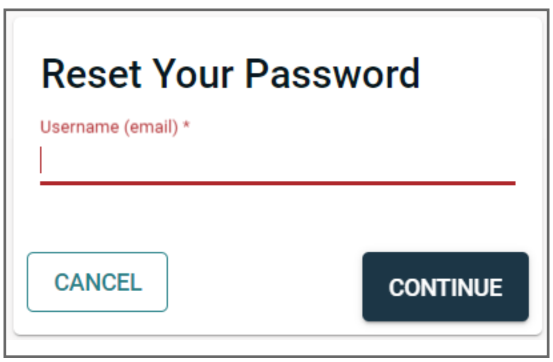
Reset Your Patient Portal Password

If you forgot your password, complete the following steps to reset it.

1. On the Patient Portal login screen, click **Forgot Password**.



2. On the Reset Your Password screen, enter the email you use to access the Patient Portal in the **Username (email)*** field, then click **CONTINUE**.

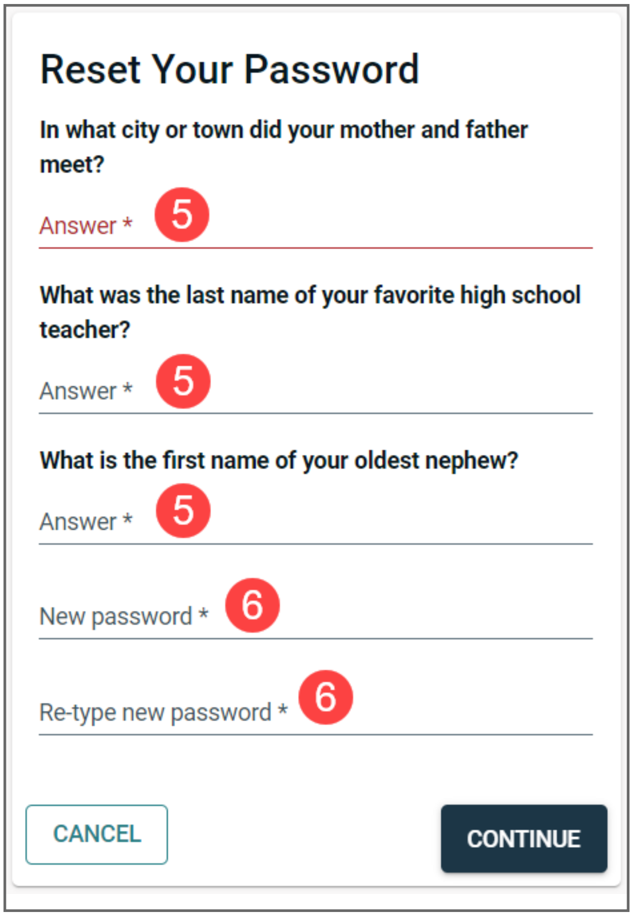


3. A message displays instructions to go to your email account and open the email from WellSky (the email account you used when registering for the Patient Portal).

4. In the email, click the link to reset your password.

Important! As a security precaution, you must click the link within one hour from when you clicked *Forgot password* on the Patient Portal login screen. If not, someone at the agency, with appropriate permissions, must reset your password.

5. Answer all three of your security questions. You entered these answers for the questions you selected when registering to use the Patient Portal.



6. Enter a password in the **New password*** field, then re-type it in the **Re-type new password*** field.
7. Click **CONTINUE**.
8. Log in to WellSky Hospice and Palliative Patient Portal with your email and new password.

Log Out of the Patient Portal

To log out of the Patient Portal, click > **Logout** in the upper-right corner.