

Intelligent Medical Software

# IMS CarePortal™ User Guide for Patients

Version 21 Published on: September 2019



### Contents

Introduction	3
End-User License Agreement and Privacy Policy	3
Portal Registration	7
Sign in to your account	10
Retrieve forgotten username or password	14
САРТСНА	18
IMS CarePortal Forms	19
IMS CarePortal Home Page	29
Navigation Bar	30
Dashboard	34
Menu Bar	34
Notifications	37
Manage your notification subscriptions	38
View a notification	39
View a notification Patient Information	
	40
Patient Information	40 40
Patient Information Appointments	40 40 49
Patient Information Appointments Health Record	40 40 49 65
Patient Information Appointments Health Record Billing	40 40 49 65 78
Patient Information Appointments Health Record Billing Vital Signs	40 49 65 78 82
Patient Information Appointments Health Record Billing Vital Signs Messages	40 40 65 78 82 85
Patient Information. Appointments Health Record Billing Vital Signs Messages Profile	40 40 65 78 82 85 94
Patient Information. Appointments	40 40 65 78 82 85 94 98
Patient Information Appointments Health Record Billing Vital Signs Messages Profile Insurance Contacts	40 40 65 78 82 85 94 98 .00





# Introduction

This document gives you complete instructions on how to use the IMS CarePortal<sup>™</sup> website, which you can use to communicate with your provider, fill out forms, and access your health records.

## End-User License Agreement and Privacy Policy

In IMS CarePortal, you can access the end-user license agreement (EULA) and privacy policy pages that contain the legal agreement and the terms of usage between Meditab and the user of the account.

On the following locations, click **Terms of Use** to view the EULA page, or click **Privacy Policy** to view the privacy policy page:

- Care Portal Registration page.
- Form Authentication page.
- Set Password page.
- On the lower portion of any page or pane in your IMS CarePortal account.

If you click **Terms of Use** on various pages, the EULA page opens.



3|IMS CarePortal™

Phone: 972-548-2797  CarePortal  Care Portal Registration  Please create your care portal username and password.  Username  (Username must be of minimum 4 characters long)  Password:	Software	
Please create your care portal username and password.  Username: (Username must be of minimum 4 characters long)		
(Password must be of minimum 8 characters long)		
Confirm Password: Email: s*****j@meditab.com (A confirmation email will be sent to this email ID. If this is not your email ID, please contact your clir I agree to the Terms of Use (last updated 23/10/15) and Privacy Policy (last updated 23/10/15) Register Cancel	inic.)	

page.

Form Authentication Please fill out the fields and click submit. You will be redirected to the orm.	Please verify your identity *Date Of Birth: *Zip Code:	by providing your Date Of Birth and 2	Zip-code:
	□ I agree to the Terms of updated 23/10/15 )	f Use <mark>I</mark> tast updated 23/10/15 ) and <mark>P</mark> r <b>Submit</b>	wacy Policy (last

**Figure 2** On the **Form Authentication** page, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.



4∣IMS CarePortal™



Set Password	Password
To change your password, fill out the required fields and click Submit. Your new password must have a minimum of eight (8) characters. Please contact our clinic in case of any concerns.	Password not entered Confirm Password I agree to the Terms of Use Itast updated 23/10/15 ) and Privacy Policy (last updated 23/10/15 )
	Submit

**Figure 3** On the **Set Password** page, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.

The surance	Prescriptions			^	Documents		^
🚰 Contacts	Date	Drug	\$IG		Description	Visit Date	View/Download
Photos	Jul 21, 2015	NEBULIZER REP			Text document (Oct 07, 2015)		B 0
	Jul 21, 2015	E TWINRIX VACCI			tiff (Jul 21, 2015)		×
E Facesheet							
NUE BUTTON DOWNLOAD HEALTH RECORD	E Drug Education		Sho	r All	B View ⊚ Download ¥ Not Exist		Show All
	E Future Appointments			^			
	Provider/Room	Date	Time				
	1993 ( 1993 - 1995 -	Nov 30, 2015	10:00 AM				
	thing ( but ) that	Dec 16, 2015	10:00 AM				
			Sha	r All			
Note: This portal is not intended as the primary source	e of communications between patier	it and provider(s). If you have not received a r	esponse to a portal request within 48 t	usiness hou	rs, please call our office:972-848-2797.		
Powered By						Privacy Policy   Terms of Use   @	12015 Meditab Software, Inc.

**Figure 4** On the lower portion of any page or pane in your IMS CarePortal account, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.



5∣IMS CarePortal™



Last Updated Oct 23, 2015

#### Meditab Software's Terms of Use (View PDF version)

The Meditab Software, Inc.'s IMS Care Portal ("the Site") is owned, developed, and managed by Meditab Software, Inc. ("Meditab"), a Call applications with access to allow their patients to view their health information.

#### Terms and Conditions of your Use of the Site.

The Ster Terms of Use" (Terms of Use") is legally binding between Meditab and you. Please read the following information carefully as these Terms of Use govern your access and use of the Site. Your continued use of the Site will indicate your agreement to be bound by the terms of Use shall conducts set from below. If you do not agree to be bound by these Terms of Use and conditions set from below. If you do not agree to be bound by these Terms of Use and conditions set from below. If you do not agree to any terms of Use, prompty exit this Site. These Terms of Use shall remain in effect at all times and maybe unlaterably revised at any time by Meditab. By continuing to access and use the Site you agree to any new or modified provised of these Terms of Use.

ACCESS OR USE OF THIS STIFLE IS STRICTLY LIMITED TO THOSE WHO HAVE OBTINUED ACCESS CREDENTIALS (E.G., A USERNAME AND PASSWORD) FROM MEDITAB OR ITS CLIENTS AND ANY USE OF OR ACCESS TO THE SITE OTHER THAN IN ACCORDANCE WITH THESE TERMS OF USE IS STRICTLY PROMINED.

ORDANCE WITH THESE. TEntrols UP use to a neuroscience of the second seco rrors, omissions, delays, and losses-including inadvertent loss of data or d of or connection to the Internet is inherently insecure and that connection to rity of the Site and the Site's Content, all information transmitted and receiv our connection to cruss of the Internet, and shall not be reconsible for an tand and agree that use of or ves to maintain the security of tion of privacy, copyright, trademark or intellectual property rights of another et connection in violation of any law, rule, or regulation, or any vio

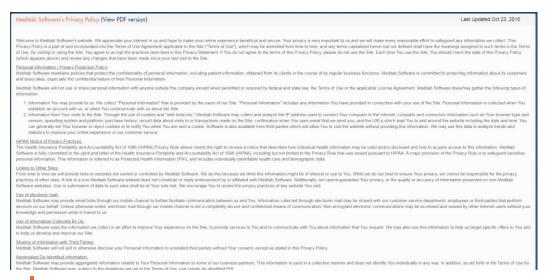
Communication Via the Sile The See blood never be used for urgent matters. The turnaround time for a response to electronic messages varies depending on physician or other health care provider's availability. Therefore, for all urgent medical matters, please contact your physici phone, go to an emergency room, or dial 911. ommunications between you and Meditab using the Site occur over a se lical information.

INTRACE. INTROMANDAL. STREAM OF THE REST. IN SOUTENT AND ANY INFORMATION INCLUDED ON OR PROVIDED THROUGH THE SITE IS PRESENTED ON AN 'AS IS' BASIS, WITHOUT WARRANTY OF ANY KND, EXPRESS OR IMPLIED MEDITAB DISCLAIMER OF WARRANTIES AND SOUTENTS, EITHER EXPRESS, IMPLED, OR STATUTORY, INCLUDING BUT NOT LIMITED TO ANY IMPLED WARRANTIES OR CONDITIONS OF MERCHANTABLITY, FITNESS FOR A PARTICULAR PURPOSE, LACK OR INCLUENCE, WORKMANKE EFFORT OR QUALITY, OR ANY WARRANTIES OF ITTLE WITHOUT LIMITED TO ANY IMPLED WARRANTIES OR CONDITIONS OF MERCHANTABLITY, FITNESS FOR A PARTICULAR PURPOSE, LACK OR INCLUENCE, WORKMANKE EFFORT OR QUALITY, OR ANY WARRANTIES OF ITTLE WITHOUT LIMITED TO ANY IMPLED WARRANTIES OR CONDITIONS OF MERCHANTABLITY, FITNESS FOR A PARTICULAR PURPOSE, LACK OR INCLUENCE, WORKMANKE EFFORT OR QUALITY, OR ANY WARRANTIES OR THE WITHOUT LIMITED TO INT IMPLED WARRANTIES OR CONDITIONS OF MERCHANTABLITY, FITNESS FOR A PARTICULAR PURPOSE, LACK OR INCLUENCE, QUEDTABLITA WARRANT FOR THE SITE AND/OR ITS CONTENT WILL SATISFY YOUR SPECIFIC REQUIREMENTS OR DECOMPARISE. WITH YOUR EQUIPARIES TOR OR THER HARDWARE, SOFTWARE, OR BROWSER CONFIDURATION OR WARRANTY THAT THE SITE OR OTHER . THE ORDER THE ONE OF THE INFORMATION OR WARRANTY THAT THE SITE OR THE AND RESULTS OR THE AND HEAD THE SITE OR RESULTS ON OR HERE AND RESTRESS AND RESPLICATION OR WARRANTY THAT THE SITE OR THE INFORMATION OR WARRANTY OF THE INFORMATION OR WARRANTY HART THE SITE OR TO THE HURD RARTY CORESULE USE ON OR WARRANTY TO AND RESULTS ON OR THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANTY THE THE BROWN OR THE OR THE DISCIDUE ON OR THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANTY HART THE DISCIDUE ON OTHER HERE AND RESTRESS TO DISTRESS ON THE INFORMATION OR THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANTY THE THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANTY THE THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANTY THE INFORMATION OR WARRANTY THE INFORMATION OR WARRANTY THAT THE INFORMATION OR WARRANT SER CONFIGURATION

LINITATION OF LABILITY AND EXCLUSION OF DAMAGES YOU AGREE THAT UNDER NO CIRCUMSTANCES AND UNDER NO LEGAL THEORY SHALL MEDITAB OR THE THRD PARTIES MENTIONED ON THE SITE BE LABLE TO YOU OR TO ANY OTHER PERSON OR ENTITY FOR ANY DAMAGES WHATSOEVER, INCLUDING, WITHOUT LINITATION, DIRECT, INDIRECT, SPECIAL, INCLUENTA, CONSEQUENTIAL, EXEMPLARY, PUNITIVE, OR OTHER DAMAGES OF ANY CHARACTER WHATSOEVER, ARSING OUT OF O'R IN ANY WITELATE TO THE USE OF ACCESST TO GIVE ADJUST TO USE OR ACCESS THE SITE ADDIO INTE SITE OCHTENT UNDER GIVE CONSCIDUTION. EDUCIDATION OF ANY CHARACTER CONSCIDUTION. THE SITE ADDIO INTO CONSCIDUTION OF ANY CHARACTER VIEWED ON THE SITE ADDIO INTO CONSCIDUTION. THE SITE ADDIO INTO CONSCIDUTION OF ANY CHARACTER CONSCIDUTION. CONSCIDUTION OF ANY CHARACTER CONSCIDUTION OF ANY CHARACTER CONSCIDUTION OF ANY CHARACTER CONSCIDUTION. CONSCIDUTION OF ANY CHARACTER CONSCIDUTION OF ANY CHARACTER CONSCIDUTION OF ANY CHARACTER CONSCIDUTION. CONSCIDUTION OF ANY CHARACTER CONSCIDENCE CONSCIDENCE ANY CHARACTER CONSCIDENCE ANY CHARACTER CONSCIDENCE ANY CHARACTER CONSCIDENCE ANY CHARACTER CONSCIDENCE ANY CHA

### Figure 5 The EULA page

### If you click **Privacy Policy** on various pages, the privacy policy page opens.



### Figure 6 The privacy policy page



6||MS CarePorta|™



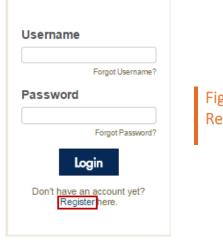
The date on the EULA page and the privacy policy page is when the content was last updated.

# **Portal Registration**

You can directly register and have your sign-in credentials in IMS CarePortal.

To register to IMS CarePortal, follow these steps:

1. On the IMS CarePortal sign-in page, click Register.





2. On the **Identity Verification** page, enter your first name, last name, date of birth, postal code, and chart number in the corresponding boxes.



7 | I M S CarePortal™

		5	• IMS <sup>™</sup> Intel Med Softw
Phone: 972-548-2797		htelligent Medical Software	
	Identity Verification		
Pleas	e verify your identity by providing following information.		
"First Name			
*Last Name			
Date of Birth	<b></b>		
*Zip Code			
Chart Number		G	
	Please enter the chart number provided by your clinic.) Submit Back		
<b>Figure 8</b> On the <b>Iden</b> verify your identity.	<b>tity Verification</b> page, e	nter the applicable i	nformation to

- 3. Click Submit.
- On the Care Portal Registration page, enter your preferred username and password, confirm your password, and then select the I agree to the Terms of Use (last updated *date*) and Privacy Policy (last updated *date*) check box.
- 5. Click Register.

P	Please create your care portal username and password.	
'Username:	mike Username available	
	(Username must be of minimum 4 characters long)	
*Password:		
	Strong	
*Confirm Password:		
Email:	s*****)@meditab.com	
	(A confirmation email will be sent to this email ID. If this is not your email ID, please contact your clinic.)	
I agree to the Terms of	Use (last updated Oct 23, 2015) and Privacy Policy (last updated Oct 23, 2015)	
	Register Cancel	





If your provider already created your username in IMS, your username automatically appears in the **Username** box of the **Care Portal Registration** page.

You can no longer change your username in the **Profile** module of IMS CarePortal if you entered your username on **Care Portal Registration**.

Your password must have a minimum of 8 and a maximum of 25 characters. It must also not be the same as your username. It must have one numeric value and one special character. The special characters that you can use are !, @, #, @, %, ^, &, \*, ?, (, ), \_, ~, -, +, and =.

If your provider already entered your email address on the **Patient Master** screen of IMS, your email address automatically appears in the **Email** box of **Care Portal Registration**.

If your provider has not entered your email address on the **Patient Master** screen of IMS, the **Email** box of **Care Portal Registration** does not appear.

After you click **Register**, you will receive a confirmation message in your email.

6. When the **Security Questions** page opens, select three security questions from the **First Question**, **Second Question**, and **Third Question** lists, and then enter your answers to your selected questions in the corresponding **Answer** boxes.

	Security Questions
	s and answer them properly below. This will help us to confirm your identity in future.
Your registration for C	are Portal has been done successfully. You can log into the portal now.
*First Question:	•
*Answer	
Hint	
HINT	
"Second Question:	•
"Answer	
Hint	
"Third Question:	•
*Answer	
Hint	
	Submit

Figure 10 Enter the applicable information on the Security Questions page to set up your security questions.



9|IMS CarePortal™



You can add a hint to your security question in Hint.

7. Click Submit.

### Note:

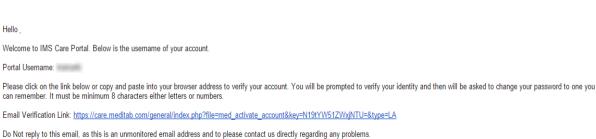
If you do not enter your security questions and close the **Security Questions** page, the **Security Questions** page opens after you sign in to your account.

### Sign in to your account

Aside from directly registering and having your sign-in credentials in IMS CarePortal, you can also sign in to your account by clicking the verification link that was sent to your email.

To sign in to IMS CarePortal, follow these steps:

1. Click the verification link.



**Figure 11** To verify your identity, click the verification link that was sent to your email to open the IMS CarePortal verification page.

 On the Activate Account page, enter the applicable information, and then click Submit.



				~ II	VIS	Med
						5010
Activate Account	Date of Birth	mm-dd-yyyy	<b>**</b>			
To activate your account, provide the required information, and then click Submit.	Zip Code					
		Submit				
Please contact our clinic in case of any concerns.						

Figure 12 On the Activate Account page, enter the applicable information, and then click Submit to proceed to the Set Password page.

- 3. On the Set Password page, enter the password that you want in New Password, re-enter it in Confirm Password, and then select the I agree to the Terms of Use (last updated *date*) and Private Policy (last updated *date*) check box.
- 4. Click Submit.

et Password	Password
change your password, fill out the required fields and ck Submit. ur new password must have a minimum of eight (8) aracters.	Password not entered Confirm Password
ease contact our clinic in case of any concerns.	$\blacksquare$ I agree to the Terms of Use (last updated 23/10/15 ) and Privacy Policy (last updated 23/10/15 )
	Submit

**Figure 13** On the **Set Password** page, enter the applicable information, select the agreement check box, and then click **Submit** to proceed to the **Security Questions** page.

 On the Security Questions page, select three security questions from the First Question, Second Question, and Third Question lists, and then enter your answers to your selected questions in the corresponding Answer boxes.



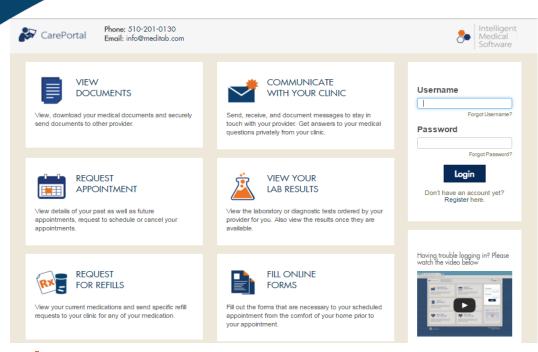
-		
	Security Questions	
Please select security question	is and answer them properly below. This will help us to	confirm your identity in future.
'First Question:		•
"Answer		ь¢
Hint		
*Second Question:		
*Answer		
Hint		
*Third Question:		•
*Answer		
Hint		
	Submit Back	
	licable information on the	e Security Questions pag
set up your security que	estions.	

You can add a hint to your security question in Hint.

- 6. Click Submit.
- 7. Enter your username and password on the sign-in page, and then click Login.



12 | IMS CarePorta|™



**Figure 15** Enter your username and password on the IMS CarePortal sign-in page, and then click **Login** to sign in to your account.

For an existing user who has not reviewed the EULA page and has not set up his or her security questions, the EULA page immediately opens after he or she signs in to his or her account. When the existing user clicks **Accept** on the EULA page, the **Security Questions** page opens. To review the privacy policy of IMS CarePortal, click **Privacy Policy** on the lower-left corner of the EULA page.



13 | IMS CarePorta|™

Intelligent Medical Software

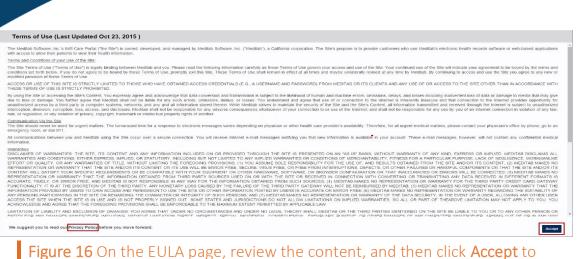


Figure 16 On the EULA page, review the content, and then click Accept to proceed to the IMS CarePortal home screen.

Also, when a provider sends a portal form link to a patient who is an existing user, but the patient has not accessed his or her account yet, the system opens the **Form Authentication** page, and then the **Security Questions** page opens after the patient fills out the **Form Authentication** page.

When an existing user whose password does not use the system's password requirements signs in to his or her account, the system requires him or her to change his or her password using the password requirements.

## Retrieve forgotten username or password

You can request your provider's office to resend your sign-in credentials in case you forget them.

**Retrieve a username.** If you cannot recall your username, follow these steps:

1. On the IMS CarePortal sign-in page, click Forgot Username?.







**Figure 17** Click **Forgot Username?** on the IMS CarePortal sign-in page to retrieve your username.

2. Enter the applicable information, and then click **Submit**.

Forgot Username?	*Existing patient?	⊖ Yes ⊜ No
Fill out all of the fields in the form and then click Submit. Your user name will be sent to your registered e-mail address.	*First Name	
Please contact our clinic in case of any issues.	*Last Name	
Learn how to retrieve username	*DOB	mm-dd-yyyy
	"Zip	Submit

Figure 18 On the Forgot Username? page, enter the applicable information to confirm your identity, and then click Submit.

3. When the message "Your request for Username is in process, You will receive email soon." appears, click **Ok**.

You will receive an email when your provider's office has processed your request. The email contains the username that you can use to sign in to the portal.

### Note:

On the **Forgot Username?** page, you can also view the video on how to retrieve the username that was provided to you.

**Retrieve a password.** If you cannot recall your password, follow these steps:

1. On the IMS CarePortal sign-in page, click Forgot Password?.

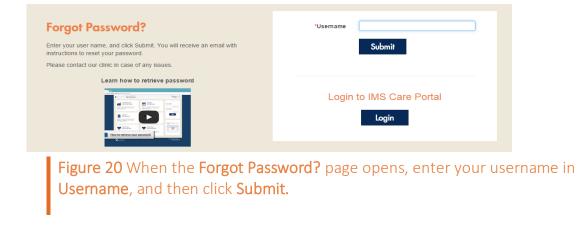




	Forgot Username?
assword	
<b>5</b> 4	
	Forgot Password?

Figure 19 On the IMS CarePortal sign-in page, click Forgot Password? to retrieve your forgotten password.

2. When the **Forgot Password** page opens, enter your username in **Username**, and then click **Submit**.



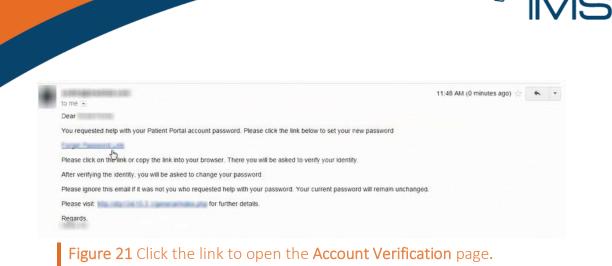
### Note:

You will receive an email after your clinic has processed your request. The email contains the verification link.

On the **Forgot Password?** page, you can also view the video on how to retrieve the password that was provided to you.

3. In the email that was sent by your clinic, click the link.





4. When the **Account Verification** page opens, enter your date of birth and zip code, and then answer the security question.

Account Verification	Date of Birth	mm-dd-yyyy	<b></b>
To activate your account, provide the required information, and then click Submit.	Zip Code	R.	
Please contact our clinic in case of any concerns.	In which city, you h	ad your first job?	Change Question
		Submit	
		Submir	

Figure 22 Enter the applicable information on the Account Verification page to open the Set Password page.

### Note:

The security question that appears on the **Account Verification** page is selected by the system randomly. If you wish to answer another security question, click **Change Question**. If you wish to view the hint that you provided, click **Hint**.

5. On the **Set Password** page, enter your preferred password, confirm it, and then click **Submit**.





Set Password	Password	
To change your password, fill out the required fields and click Submit. Your new password must have a minimum of eight (8) characters. Please contact our clinic in case of any concerns.	Password not entered Confirm Password Submit	
	Submir	

**Figure 23** On the **Set Password** page, enter your preferred password, confirm it, and then click **Submit** to reset your password.

# CAPTCHA

In IMS CarePortal, the system implements the Completely Automated Public Turing Test to Tell Computers and Humans Apart (CAPTCHA) feature. CAPTCHA is an additional security feature that protects your account.

The CAPTCHA feature appears after several failed attempts of signing in to your IMS CarePortal account.

Jsername		
portal		
	Forgot Userna	me?
assword		
	Forgot Passw	ord?
I'm not a rob	rec.	
La	ogin	
Don't have a	an account yet	2

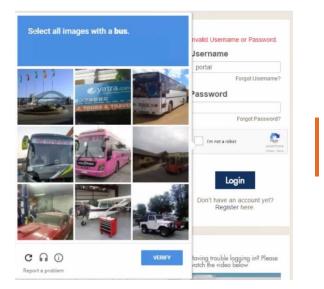
**Figure 24** The CAPTCHA feature on the IMS CarePortal sign-in page



18 | I M S CarePorta|™



When the CAPTCHA feature appears, select the **I'm not a robot** check box, do the required steps in the verification window of CAPTCHA, and then click **Verify**.



**Figure 25** The verification window of the CAPTCHA feature

The CAPTCHA feature also appears on the **Forgot Username?** and **Forgot Password?** pages.

# **IMS CarePortal Forms**

In IMS CarePortal, you may fill out forms that are relevant to your scheduled appointment. To enter the details, follow these steps:

1. In the email that was sent by the clinic, click the link to open the IMS CarePortal verification page.

### Note:

To access your IMS CarePortal forms, sign in to IMS CarePortal, and then click **Forms** on the upper-right portion of the IMS CarePortal home page. If you access your forms in this manner, you no longer have to go through the verification process. Click a form title on the **Patient Forms** page to open that form.





Hello,

Your appointment is scheduled on Monday , Jul 13, 2015 at 08:15AM with

Kindly click on the following link(s) to fill required forms for above mentioned appointment.

Patient Form (Schedule Form)

Thanks,

Meditab Software Inc.

Figure 26 In the email that you receive from your provider, click the link to open the form.

2. On the IMS CarePortal verification page, enter your date of birth and zip code, answer the security question, and then click **Submit**.

itication	Date of Birth	mm-dd-yyyy	
ut the fields and click submit. You will be redirected to the	Zip Code	La*	
	In which city, you h	ad your first job?	Change Question
contact our clinic in case of any concerns.		0.1-2	
		Submit	

**Figure 27** On the **Form Authentication** page, enter your date of birth and zip code, answer the security question, and then click **Submit** to open the form that your provider sent.

3. Enter the applicable information in the form pages, and then click **Next Page**.

New Patient Forms	Welcome			ථ
Marries - Million Torville (1934)	N() AND THE 102 (201)	aners, # munified[] and	max (#Houseau ((2110)) / 8230) - 8850(11	
				Next Page •
Welcome! Thank you for t	he choosing IMS CarePortal for yo	ur medical care.		
			naire that will help us to make the appropriate diagnosis and provide the ely 20-30 minutes to complete this questionnaire.	best treatment plan for you.
If you have any questions	or concerns, please don't hesitate t	o call any of our offices:		
California Fresno Miami	(510) 632-8021 (510) 632-8021 (510) 632-8021	Sacramento Oakland Argentina	(510) 632-8021 (510) 632-8021 (510) 632-8021	
	In the form pa ill out the entir		he applicable information, and	then click <b>Next</b>





- 4. Use the following navigation tools in the form:
- Previous Page or Next Page. Click the Previous Page symbol or the Next Page symbol to go from one page to another.
- Page list. To go directly to a specific page, select an option from the Page list.
- First Page or Last Page. Click the First Page symbol K to go directly to the first page or the Last Page symbol K to go directly to the last page.

You can monitor your progress using the progress bar on the upper-right corner of each page.

• Select Language. Select a language that you prefer from the Select Language list.

Patient Form - policy	
67%	Page: 7. policy
ime:Rula Patient (Male)   DOB:Aug 10, 1991  Home Phone:(454) 545-45454	[Page 7 of 14] H4 + +
ase answer each of the following questions to the best of your ability. If you do not understand a question, skip it and continue on to the next page. You may go back to a prev	ious page at any time to make changes or additions.
Financial Policy	
Our continued participation in your health plan depends upon everyone fulfilling his or her obligation in accordance with the contracts. Platents are responsible for all deduct patents, we call your insurance to get a description to benefits. This differs is not responsible for all process term information open to us by your insurance to but your insurance to the your insurance tother your ins	es in coverage after verification date. A description of benefits is not a syment is due at the time service is rendered. We accept Visa, MasterCard, offits quoted yourself, please call your insurance company.
I accept the financial policy of this office.	
I accept the financial policy of this office.      Hipsa Frivacy Policy      Hipsa Frivacy	ION, PLEASE REVIEW IT CAREFULLY.

- 5. In the **Forms to be Signed** page, press and hold the left mouse button, and then drag the pointer to enter your signature in the **Patient Signature** box.
- 6. Click Submit.





Please click on Submit button for e	ach form, otherwise the signatures will not be saved.	^
HIPAA Agreement		
Portal signed form	Meditab Software Inc. 33 Neprotection Find. 54 20 October (CARE)	
Form 1	MEDITAB Phrms 510 532 2017 359	
Form 3	Insertions the base is a diamond of the setting of	L
Form 4		L
Form 5	6625/2016	L
Form 6	Dear Parties Training	L
Form 7	Kindy wady the agreement below and provide your signature	L
Visit Note Form	THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION, PLEASE REVIEW IT CAREFULLY.	L
	This factor of Philory Practice describe how we may use and disclose your protected health information (PHI) to carry out Treatment, purpret or health care specificies (PDI) and for other purposes that are permitted or registed by last. It also describes your rights baceres and control your protected health information. "Hoteled health information about you, including demographic information, that may identify you and that healte to your past, present or future physical or mental health or condition and related health care services. TRESIMENT: We will use and disclose your protected health information to provide, conditional, or margay your health care services. For example, we would disclose your protected health information may be provided to a physician to whom you have been referred to ensure that the necessary information to diagnose or theat you.	
	COMPLANTS You may complain to us or to the Secretary of Health and Human Services if you believe your privacy rights have been violated by us. You may file a complaint with us by notifying our privacy contact of your complaint. We will not retailate against you for filing a complaint.	l
	This notice was published and becomes effective onlive before April 14, 2003.	L
	Your signature below is only admonifedgement that you have received this Notice of our Privacy Plastices.	L
	Patient Sgnature: Date:	
	Patient Signature:	
	Salant	
	G Read Signature	÷
Figu	re 30 The Forms to be Signed page	

When you sign a form and click **Submit**, the next form that requires to be signed automatically opens. After signing the last required form, the next page of the IMS CarePortal form opens.

You can click the Reset Signature symbol  $\ensuremath{\mathbb{C}}$  to reset the Patient Signature box and change your signature.

Your provider recommends that you sign all forms in the **Forms to be Signed** page before proceeding to the next page.

- 7. On the demographic page of the form, enter the applicable information, and then do the following:
- Search. Click the Search symbol Q to open the list of entries for a selected field.





This symbol appears in the **Referral Provider** field and **Pharmacy** box of the portal form.

• **Reset**. Click the **Reset** symbol *S* to clear the entries of a field.

This symbol appears in the **Referral Provider** field and **Pharmacy** box of the portal form.

Zip:		Email:		Language:	•
SSN:		Marital Status:	•	Pharmacy:	Q\$
Driver's License No:		Cell Phone #:		Home Phone #:	
Work Phone #:					
*Bill To:	•				
					Q Search 2 Reset
(Please fill in Father and Mother's Inf	formation only if child/son/daughter is a minor)				
Father/Guardian					
First Name:		Last Name:		DOB:	( 📫 )
Home Phone #:		Cell Phone #:		Email:	
SSN:		Address:		Zip:	
Mother/Guardian					
First Name:		Last Name:		DOB:	<b></b>
Home Phone #:		Cell Phone #:		Email:	
SSN:		Address:		Zip:	
Referral Provider Q 2					
First Name:		Last Name:		Address:	
-					
Figure 3	1 The Search and Res	et svi	mbols		
		/			

8. On the **Insurance** page of the form, enter the applicable information, and then click **Save**.

### Note:

When you enter your insurance information and select a sponsor for your insurance from the **Relation** list, the system opens the **Insured By** section.



23 | I M S CarePorta|™

urance			
**Insurance:	•	Priority:	Primary  Secondary  Tertiary  Other
**Insurance ID:		Group No:	
Start Date:	<b></b>	End Date:	Ê
**Relation:	Employee •		
ву			
*First Nam	8:	"Last Name:	
Date of Birt	h:	Sex:	
Addres	5:		
Zi	D:		
Note:			
		Please be sure to click on Save before going to next page.	

Figure 32 The Insured By section on the Insurance page of the form

### Note:

When you save the insurance information and either the date of birth or the sex of the insurance sponsor is not in the **Insured By** section, the "Below Detail(s) of the Insured By if not entered, might result in rejection of claims. Would you like to add?" message appears.

localhost says:	
Below details of the Insured By if not entered, might result in rejection of claims. Would you like to add?	
- Date of Birth (DOB) - Sex	<b>Figure 33</b> The message that appears after you save the insurance
Prevent this page from creating additional dialogues.	request.
Prevent this page from creating additional dialogues.  OK Cancel	

9. On the **Allergy** page of the form, click **No Known Allergy** if you do not have a recorded allergy.



🤊 IN 🖊

Intelligent



	Allergy							_	
Portal Test (Female)   I	008:Feb 02, 2000 [15	years, 8 months]						1	8% [Page 1 d
							Pag	er 1. Alergy	1 - A
e answer each of the	following questions to t	he best of your abrity. If you do no	Lunderstand a question;	skip it and continue on to the next page. Y	ou may go back to a previous	s page at any	time to make changes or additions.		
Make Ina	tive	Millio Active	No Known	Allergy					
Date	Allergy			Reaction		Note			Active
				No data found					
id Allergy								*- Update Request is pe	inding from Doctor's offic
id Allergy									
	"Type:		-		2				
	Reaction:	libore							
		Swelling of tongue Swelling of Ips	i						
		Swelling of face	-						
	Treatment Taken:					Note:			
	Treated By:								
				Please click on "Add Allergy" butto					
				Add Allergy Cle	ar				
								e 1. Nergy	

When you click **No Known Allergy**, the system automatically proceeds to the next page of the form.

You are required to fill out the **Allergy** page of the form. If you do not indicate the applicable information on the page, the "Please add at least one allergy or if you do not have any allergy or do not know your current allergy, please select No 'Known Allergy'." message appears.

10. On the **Medication** page of the form, click **No Current Medication** if you do not have a recorded medication.

				Page 2. Medication	E • •
lease answer each of the following	g questions to the best of your ability. If you do not understand a question, step it and confi	inue on to the next page. You may go back to a previous	page at any time to make changes or addi	horts.	
No Current Medication					
Drug	Dosage	Reason For Taking	Prescribed By	MD	
		No Medication(s) available			
				* Update Request is p	
Add Medication				<ul> <li>Opdate Request &amp; p</li> </ul>	enoing from Doctor's on
"Medication	Search Medication Q	*Prescribed By			
Dosage	(We recommend you to select Medication by clicking on Search link)	Note			
Reason For Taking					
Heason For Taking		the medication by clicking on "Add Medication" b	1410		
	Please be sure to save	Add Medication Clear	utton		
				Page 2. Medication	<b>a</b> ,
					1000





When you click **No Current Medication**, the system automatically proceeds to the next page of the form.

You are required to fill out the **Medication** page of the form. If you do not indicate the applicable information on the page, the "Please add at least one medication or if you do not have any medication or do not know your current medication, please select 'No Known Medication'." message appears.

11. On the last page of the form, click **Finish**.

New Patient Form - Occupational and Social History		Ċ
Name: [DOB:  Home Phone:	100%	[Page 7 of 7]
	Page: 7. Occupational and Social Histor	T Het 4 Finish
Please answer each of the following questions to the best of your ability. If you do not understand a question, skip it and continue on to the next page. You may go back to a previous page at any time to make chan	ges or additions.	
Please mark the following that corresponds to your Social History :		
Occupational Status		
© Working © Unemployed ⊚ Retired ⊚ On disability ⊚ Child ⊚ Student ⊚ Other		
Type of Work		
Construction Dentist Doctor Electrician Farmer Lawyer Plumber Secretary Teacher Other		
Marital Status		
Single 🕘 Married 🕘 Married (Common Law) 💿 Domestic Partner 💿 Separated 💿 Divorced 💿 Divorced/Remarried 💿 Widowed 🗇 Widowed/Remarried 💿 Other		
Members of Household		
Spouse Children Father Father Mother Mother Mother Mother		
Paternal Grandfather Maternal Grandmother Maternal Grandfather Foster Parents Boyfriend Griffriend Other		
Diet		
Type of Diet Number of Meals per day		
Recreational Drug Use		
📄 Cocaine 📄 Crack 📄 Ecstasy 🗒 Hashish 📄 Heroin 📄 IV Drug use 📄 Marijuana 📄 Painkillers 📄 Other		
Smoking History		
◎ Smoker ◎ Ex-Smoker ◎ Non-Smoker		
Are you exposed to second hand smoke ? © Yes ® No		
Alcohol Usage		
💿 Currently Drinking 💿 Former Drinker		
Caffeine Intake		
Coffee Soda Tea Other		
Others		

Figure 36 On the last page of the form, click Finish to fill out the form.

- 12. On the **Other Forms to be Filled** page, do either of the following:
- Click **Go Back and Review Form** to go back to the previous form and edit the details as necessary.
- Click the form title in the **Form** column to access the selected form.





You do not have to reverify your identity to open another form from the **Other Forms to be Filled** page.

13. On the thank-you page, click Logout.



If you open the form using the link sent to your email after you signed out from IMS CarePortal, you will be asked to go through the verification process again.

For existing users who have not signed in to their account and accessed the form using the link that was sent to their email, the **Form Authentication** page opens where they can enter their date of birth and zip code.

On the Form Authentication page, select the I agree to the Terms of Use (last update *date*) and Privacy Policy (last updated *date*) check box, and then click Submit to open the Care Portal Registration page.





Form Authentication	Please verify your identity *Date Of Birth:	y by providing your Date Of Birth and 2 mm-dd-yyyy	Zip-code.
Please contact our clinic in case of any concerns.	*Zip Code:		
	I agree to the Terms of updated 23/10/15 )	of Use (last updated 23/10/15 ) and Pr	ivacy Policy (last
		Submit	2

Figure 38 The Form Authentication page with the agreement check box

On the Care Portal Registration page, you can do either of the following:

• Enter your preferred username and password, confirm your password, and then click **Register** to register to the portal and open the form.

### Note:

If you register to the portal, the **Security Questions** page opens before the form.

• Click **Skip Registration** to directly open the form without registering to the portal.

Phone: 972-548-2797		Medical Software
	Care Portal Registration	
F	Please create your care portal username and password.	
"Username:	(Username must be of minimum 4 characters long)	
"Password:	(Password must be of minimum 8 characters long)	
*Confirm Password:		
I agree to the Term	ns of Use (last updated 23/10/15) and Privacy Policy (last updated 23/10/15)           Register         Cancel	
Figure 39 The Care Portal	Registration page	





If you do not have a portal account, the **Care Portal Registration** page opens before the form.

# **IMS CarePortal Home Page**

After you sign in, the IMS CarePortal home page opens. This page has three major sections: the navigation bar, the menu bar, and the dashboard.

	CarePortal Pt. Balance: \$75.93						FORMS PERITAL P	Select Language	Software
_	and a second							Select Language	
	쇍 Home	∆ Labs			~	Prescriptions			
	Appointments								
	💖 Health Record 🔟	Provider	Lab	Lab Test		Date	Drug	SIG	
	\$ Billing	Ready Present	Quest Diagnostics Inc.	17 HYDROXYPREGN		May 31, 2016	ALLEGRA ALLER		
			Quest Diagnostics Inc.	HEMOGLOBIN A1cQ		Mar 22, 2016	LESCOL XL 80		
	III Vital Signs	100.00	Quest Diagnostics Inc.	CORNQ		Mar 22, 2016	LESCOL XL 80		
	Messages 🕑	0 Maw full fact				Prior Authorization			
	💄 Profile	Q view full test.	Q View full test IB Result Show All				Prior Authorization Show All		
	🛧 Insurance	Documents	Documents			Future Appointments			~
	警 Contacts								
	🌆 Photos	Description		Visit Date		Provider/Room	Date	Tim	ne
		Test document (Jun 06, 2016)			60		No Future Appointment	ts Available	
	E Facesheet	HIPPA Aggrement (Ma	ay 30, 2016)		×				
	BLUE BUTTON DOWNLOAD	Letter (Mar 16, 2016)			×				
		View O Download	× Not Exist		Show All				Show All
		ita Careplan			^	Prior Authorizati	ons		^
		Care Plan		Visit Date		Date I	Drug Status	Outcome	

### Note:

When an inactive user signs in to his or her account, the "Your account is inactive. Your access is limited to Read only" message appears in the uppermost section of the IMS CarePortal home page.



Navigation Bar

		*********Your account is inactive. Your access is limited to Read only.*********	
CarePortal			Intelligent Medical
CarePortal			FORMS FORMS Software
Pt. Balance: \$690.01(Credit)			FORMS LOGOUT Software
Pt. Balance: \$690.01(Credit)	<ul> <li>Add Vital Signs</li> </ul>		♣ FORMS LOGOUT Software
Pt. Balance: \$690.01(Credit) * nome Appointments	Add Vital Signs		♣ FORMS LOGOUT Software
Pt. Balance: \$690.01(Credit) * nome Appointments	Add Vital Signs	You do not have access for this screen.	♣ FORMS LOGOUT Software
PL Balance: \$690.01(Credit) T Frame Appointments V Health Record () \$ Billing	Add Vital Signs	You do not have access for this screen.	♣ FORMS LOGOUT Software
Pt: Balance: \$690.01(Credit)  Pt: Balance: \$690.01(Credit)  Appointments  Hacith Record 3	Add Vital Signs		♣ FORMS LOGOUT Software
Pt. Balance: \$690.01(Credit) # roote Appointments * Headth Record @ \$ Billing M Vitel Signs	Add Vital Signs		♣ FORMS LOGOUT Software

**Figure 41** The message that appears in the uppermost section of the IMS CarePortal home page when an inactive user signs in to his or her account.

# **Navigation Bar**

On the navigation bar, you can find the following:

• Notifications. Click the Notifications symbol symbol to open the Notifications list and view your notifications for new and updated records.

From the **Notifications** list, click a notification to view your new or updated record in the IMS CarePortal module of the selected notification.



### Note:

The system highlights the unread notifications in the Notifications list.

To open the Notifications pane, click See All.



Intelligent Medical Software



• Forms. Click Forms to open the Patient Forms page where all the forms that you need to fill out are listed.

For more information about how to open and fill out forms, see <u>IMS CarePortal</u> Forms.

From:	Te:	Status:		▼ Search				
Form	Name	App. Date ¢	App. Time	Office ©	Provider \$	Procedure ¢	8 ta tu s	Progress
New Patient Forms		Jul 25, 2014	10:45 AM	Meditab Software Inc.			Filled	100%
Gastro Forms		Jul 24, 2014	10:15 AM	Meditab Software Inc.			In Progress	0%
Patient Form_old		Jun 11, 2014	10:00 AM	Meditab Software Inc.		DIRECT BILLING	Filled	6%

Figure 43 On the Patient Forms page, click a form title in the Forms column to open it.

- Patient. Click Patient Name to see the following options:
  - Forms To Be Filled. Click Forms To Be Filled to open the Patient Forms page where all the forms that you need to fill out are listed.
  - About Clinic. Click About Clinic to read the history, mission, and other details of your provider's office.





### About clinic

```
Clinic Information
As Healthcare evolves, one of the most impactful segments will be internet-based patient care. Meditab's Patient Portai
(built from the ground-up by physicians and pharmacists) allows patients access to a
personal healthcare homepage that enables them to view and update most information related to their current health record.
Patients can also pre-register for doctor visits via a secure internet interface.
A secure, personalized healthcare homepage is accessible from anywhere in the world...
Wherever internet access is available, patients can view lab results, access current health records, view/update appointments and schedules,
refili prescriptions, and receive and reply to notes from their doctors - from their own personal computer.
Advanced healthcare at home through patient self-education.
Patients get immediate assistance with health complaints by completing condition-specific questionnaires that suggest possible diagnoses
and lead patients to links for case-specific self-education.
Automatically deliver patient outcomes and disease management tools
to the patient's home.
With automated structured communications, physicians can deliver patient information electronically.
Designed for the health care industry by health care professinals...
Meditab's Patient Portai is a completely original product designed specifically to enhanced the healthcare experience for both patient and doctor.
Secure Internet Interface....
Sensitive data is only viewable by patients and their physician.
Emergency healthcare protection.
In an emergency, ER doctors can obtain important information (such as drug allergies, or diabetic history) so proper treatments can be administered
when time is critical.
Patient Portal is one of the most advanced evolutionary steps in healthcare.
It allows patients to be more connected to their medical lives - putting more control, more responsibility and more proactive self-diagnosis in their hands.
Patients now have 24 hour secure access to their entire health record from home allowing them to view and update: prescription renewal,
appointments, lab results disease management tools, and self-diagnosis tools.
Additionally, with the built-in pre-registration component, the Patient Portal also alleviates the multi-tasking strain on front office staff.
It allows patients to pre-register
(select/confirm appointments and complete documents and forms) via a secure internet interface. Meditab's IMS solution automates the
entire registration process, resulting in increased efficiency and more productive use of the front office staff time.
Some of the benefit is you will realize with the Patient Portal include
      Figure 44 The About Us page
```

- **Contact Clinic**. Click **Contact Clinic** to view the contact details of your provider's office.
- SMS/Email Subscription. Click SMS/Email Subscription to manage your notification and reminder subscriptions. For more information about how to manage your notification and reminder subscriptions, see <u>Notifications</u>.
- Help. Click Help to view the user guide and the training videos related to the portal.
- Activity Log(s). Click Activity Log(s) to monitor the activities that you perform in IMS CarePortal.





om Date:	To Date:	Activity	:	Screen:	Source:	
10-11-2017	10-18-2017	All	•	All	All	Search
Date/Time -	User ≑	Activity	Screen ≎	Health Record	d Recipient address	Source \$
Oct 18, 2017 11:37 AM	10 Haiserines, the set	View	Home	NA	NA	IMS Care Portal
Oct 18, 2017 11:36 AM	:48 Himminen	Login	Login	NA	NA	IMS Care Portal
Oct 18, 2017 11:36 AM	:37 Human	Login	Login	NA	NA	IMS Care Portal
Oct 13, 2017 12:29 AM	:00	View	Documents	NA	NA	IMS Care Portal
Oct 13, 2017 12:18 AM	11	View	Home	NA	NA	IMS Care Portal

### Figure 45 The Activity Log(s) pane

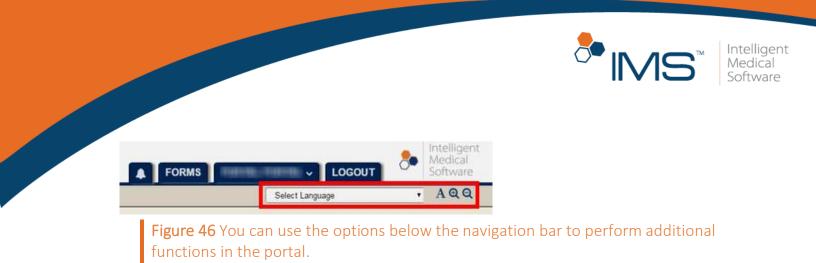
You can filter the information that you want to view using the applicable criteria in the **Activity Log(s)** pane.

• Logout. Click Logout to sign out from your account.

Below the navigation bar, you can find the following:

- Select Language. Click Select Language to select your preferred language that will be used in the portal.
- **Default font size**. Click the **Default font size** symbol A to set the fonts in the portal to their default sizes.
- Decrease font size. Click the Decrease font size symbol Q to decrease the size of fonts in the portal.
- Increase font size. Click the Increase font size symbol 🔍 to increase the size of fonts in the portal.





# Dashboard

The dashboard contains the overview of the different modules—health records, documents, appointments, and messages—in your account.

Each module in the dashboard displays the three most recent information or records from your provider.

For more information about the modules, see <u>Patient Information</u>.

### Menu Bar

The menu bar displays the modules that contain patient information. The different modules are the following:

- Home. When you are on another page, click Home to go back to the home page.
- Appointments. Click Appointments to access the following options:
  - o **Request**. Click **Request** to schedule an appointment with your provider.
  - Future/Past. Click Future/Past to view your past and future appointments.





- Health Record. Click Health Record to access the following options:
  - **Documents**. Click **Documents** to access the page where you can view, download, and transmit your documents.
  - **Careplan**. Click **Careplan** to access the page where you can view the different care plans that your provider prepared for you.
  - Labs. Click Labs to access the page where you can view the laboratory tests ordered by your provider for you and the test results if already available.
  - **Prescriptions**. Click **Prescriptions** to access the page where you can view the prescription details from your provider and request for a drug refill.
  - **Prior Authorizations**. Click **Prior Authorizations** to access the page where you can view the details of the prior authorizations for your prescriptions. Prior Authorization (PA) is the process of obtaining a preapproval from the payer of a prescription. The electronic form of PA is called ePA.
  - Immunization. Click Immunization to access the page where you can view your immunization details from your provider.
- Billing. Click Billing to see the following options:
  - **Pay Bill**. Click **Pay Bill** to access the page where you can settle your balance with your provider.
  - **Payment History**. Click **Payment History** to view the details of your previous payments.
  - **Billing Receipts**. Click **Billing Receipts** to access the page where you can view or download your billing receipts.





- **Billing Statements**. Click **Billing Statement** to access the details of your billing statements.
- Quotations. Click Quotations to view quotes for clinical procedures.
- Vital Signs. Click Vital Signs to view your recorded vital signs or add some updates.
- **Messages**. Click **Messages** to view the list of messages from your provider or send your provider a message.
- **Profile**. Click **Profile** to edit, view, and update your account information.
- **Insurance**. Click **Insurance** to access the page where you can view and update your insurance details.

You can also add a new insurance to your record.

- **Contacts**. Click **Contacts** to view your contact details or add contact details of other people.
- **Photos**. Click **Photos** to access the page where you can view and upload relevant photos.
- Facesheet. Click Facesheet to access the overview of your healthcare information.
- Blue Button Download Health Record. Click Blue Button Download Health Record to view, download, and send your health record.

When you view your healthcare information in the different modules on the menu bar, you can sort the information in ascending or descending order by clicking the arrow symbols beside the column header.





	Office \$	Provider/Room \$	Date▲	Time 🗘	Procedure \$	Note 🗢
U	incine Billiopeine	Plant ( Bernard)	08 Apr 14	11:00 AM		
U	incine Torivoni inc	Plani ( Bernari	11 Jun 14	10:00 AM	Face Lift	
U	incine Telleperine	THE PART PARTS	24 Jul 14	10:15 AM		
U	incine Toriversites	Mic Class ( Thats)	25 Jul 14	10:45 AM		
с	insing Billiopsi ins	THE PERSON PERSON	31 Jul 14	10:00 AM		

### Figure 47 The healthcare information in ascending order

	Office \$	Provider/Room 🗢	Date	Time 🗢	Procedure \$	Note 🗢
U	HANNAR Billions (As	Plani i Bernari	30 Aug 14	10:45 AM		
м	HALIANA TARVARI (AL	THE FRAME PROPERTY	30 Aug 14	11:30 AM		
U	HALINAR THINK I AN	700-71480-1714840	29 Aug 14	10:45 AM		
С	HALIANA TARVARI (AL	1001010001070000	31 Jul 14	10:00 AM		
U	incina Toffware (Inc	1001010010000	25 Jul 14	10:45 AM		

Figure 48 The healthcare information in descending order

# **Notifications**

You can subscribe or unsubscribe to an email or SMS notification in IMS CarePortal. Notifications are categorized into modules. You can also view your notifications in the **Notifications** pane.





# Manage your notification subscriptions

To manage your notification subscriptions, follow these steps:

- 1. On the IMS CarePortal navigation bar, click *Patient Name*, and then click **SMS/Email Subscription**.
- 2. In the **Manage SMS/Email Notification Subscription** pane, do any of the following:
- To view the description of a module, point to the information symbol <sup>1</sup> of a module in the List column.



Figure 49 In the List column, point to the information symbol of a module to view the description of the module.

- To receive a reminder or notification of a selected module through email, select the check box beside the selected reminder or notification in the **Email** column.
- To receive a reminder or notification of a selected module through SMS, select the check box beside the selected reminder or notification in the **SMS** column.
- To stop receiving a reminder or notification of a selected module through email, clear the check box beside the selected reminder or notification in the **Email** column.
- To stop receiving a reminder or notification of a selected module through SMS, clear the check box beside the selected reminder or notification in the **SMS** column.





- To receive reminders and notifications of all modules through email and SMS, click **Subscribe to All**.
- To stop receiving reminders and notifications of all modules through email and SMS, click **Unsubscribe from All**.

ist	Email	5M 5
Appointment Reminder		
Portal Message Notification		NA
Portal Form Reminder	2	
Allergy Shot Notification	×	8
Patient Note Notification		
Reminder Notification	0	
Patient Billing Statement		NA
Save Subscribe to All	Unsubscribe from All	

3. Click Save.

You can also unsubscribe from your notification subscriptions in IMS Patient App and in the link that you receive through SMS or email.

## **View a notification**

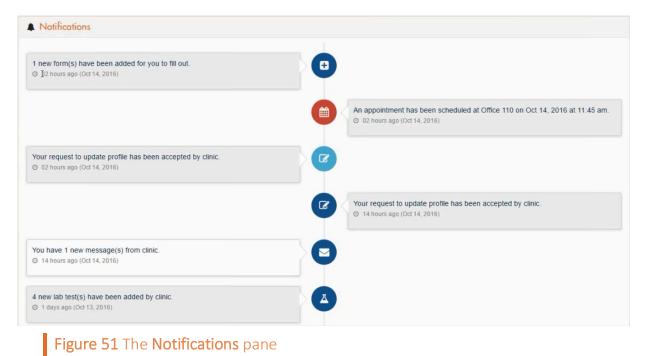
To view a notification, follow these steps:

- 1. On the navigation bar of IMS CarePortal, click the **Notifications** symbol **1**.
- 2. From the **Notifications** list, click **See All**.





3. In the **Notifications** pane, click the notification that you want to view.



#### Note:

When you click a notification, the system opens the module of the selected notification.

# **Patient Information**

You can access different modules for your patient information in IMS CarePortal using the dashboard and menu bar.

# **Appointments**

You can view a summary of your scheduled appointments in **Future Appointments** of the dashboard.





To view your past and future appointments, click **Show all** in the **Past Appointments** and **Future Appointments** panes.

24 Jul 15 10:15 AM	Provider/Room	Date	Time
	Autor (Teas)	24 Jul 15	10:15 AM
			Show All

**View appointments.** To view a list of your past and future appointments, do either of the following steps:

- On the menu bar, click **Appointments**, and then click **Future/Past**.
- On the dashboard, click **Show all** in the **Future Appointments** pane.

	uture Appointments					
	Provider/Room \$	Date 🕏	Time \$	Procedure \$	Note 🗢	
U	STATE CONTRACTOR	24 Jul 15	10:15 AM	DIRECT BILLING		
Po	ast Appointments					
	Provider/Room \$	Date 🗢	Time \$	Procedure \$	Note \$	
и	0.7110 / 1000	30 Aug 14	11:30 AM			
J	The Person	30 Aug 14	10:45 AM			
	Contract of Telephone	29 Aug 14	10:45 AM			
U						
u c	ALTER (TRAC	31 Jul 14	10:00 AM			
	ALTER (THE)	31 Jul 14 25 Jul 14	10:00 AM 10:45 AM			
С	naria (Tala) naria (Tala) naria (Tala)					
J	nataa Pitaa aataa Pitaa aataa Pitaa Taa Pitaa	25 Jul 14	10:45 AM	DIRECT BILLING		

Figure 53 The Future Appointments and Past Appointments panes



41||MS CarePorta|™



Your appointments can have the following statuses:

- Confirmed <sup>(C)</sup>
- Unconfirmed (U)
- Cancelled By Provider <sup>(D)</sup>
- Cancelled By Me (P)
- Cancel request Pending (\*P)
- Missed (M)

#### Note:

If you want to cancel a future appointment, click the cancel appointment symbol<sup>®</sup> in the rightmost column of the appointment. Instructions on how to contact your provider's office regarding cancellations will appear. The cancellation request still has to be approved by the provider's office.

**Request an appointment.** To send an appointment request, follow these steps:

- 1. On the menu bar, click **Appointments**, and then click **Request**.
- 2. In **Request an Appointment**, fill out the following boxes:
- Office. In Office, enter the name of the office that you want.
- **Provider**. Select a provider from the **Provider** list.
- Phone. Enter your phone number in Phone.
- Email. Enter your email address in Email.





- **Reason**. Enter the reason for the appointment in **Reason**.
- Preferable Date. In the Preferable Date pane, enter your preferred date range in From and To. To open the Available Slots window and check the provider's availability, click Check Availability.
- **Preferable Time**. In the **Preferable Time** pane, enter your preferred time frame in **From** and **To**.
- 3. Click Request an Appointment.

② Request an Appointme	ent	
		Back to appointments
*For: *Office: *Phone: Reason:		Provider:
*Preferable Date		
From:		To:
From:		To:
From:		To:
* - Please select atleast one F	Preferable Date.	
Preferable Time		
From:	AM V	To: AM v
From:	AM T	To: AM V
From:	AM T	To: AM •
-	intment request is for non-urgent appointment. I	est an appointment f you require to have an immediate appointment, then please call at our office.

**Figure 54** In **Request an Appointment**, enter the applicable appointment information, and then click **Request an Appointment** to request appointment.





4. When the "Your request for an appointment has been sent successfully." message appears, click **Ok**.

In **Request** of the **Appointments** module, you can do either of the following:

- Click Update Requested Appointment to update your request.
- Click **Cancel Requested Appointment** to cancel your appointment request.

F	uture Appointments					
	Provider/Room \$	Date 🖨	Time 🖨	Procedure \$	Note 🗢	
	Number of State	24 Jul 15	10:15 AM	DIRECT BILLING		0

**Figure 55** In **Request of the Appointments**, click either **Update Requested Appointment** or **Cancel Requested Appointment** to update or cancel an appointment request.

**Request for a televisit.** You can request for a televisit appointment in IMS CarePortal. You can use this option if you are unable to physically meet your provider.

To request for a televisit in IMS CarePortal, follow these steps:

- 1. On the menu bar, click **Appointments**, and then click **Request**.
- 2. In the **Request an Appointment** pane, select the **Televisit** check box, and then enter the applicable appointment information.



		Intelligent Medical Software
Televisit:  Office:  Phone:  Reason:	Provider:	
Preferred Date:     From:	To:	
Figure 56 The Televisit check box		

- 3. In the lower-right pane, click Request an Appointment.
- 4. When the confirmation message appears, click **OK**.

In the confirmation message, the details may vary.

Pay the copay amount to start a televisit. Before you can start a televisit,

it is necessary to pay the copay amount at any time before the scheduled appointment. When you try to start a televisit, the system prompts you to pay the applicable copay.

Before the appointment, you can also pay the copay amount through the Appointment module in IMS CarePortal.

To pay the copay amount to start a televisit, follow these steps:

1. In the Today's Televisit pane, click Start Visit.

#### Note:

The Today's Televisit pane appears in Home of IMS CarePortal.

Today's Televisit appears only if you have an upcoming televisit.





2. In **Televisit Payment**, enter the applicable payment information.

\$	Televisit Payment	
	Disclaimer: In order to proce	ed ahead with Televisit, please pay the amount first.
		• Credit Card • ACH Payment
	*Name on Card:	
	*Credit Card No:	
	*Card Type:	Y
	*Expires on:	Month •
	Zip:	00501
	*CVV:	
	*Amount:	2.0
		Pay Now Close
No	te: All transactions are done	through trusted and secure payment gateways

Figure 57 In Televisit Payment, enter the applicable payment information to pay for the televisit.

3. Click Pay Now.

**Pay the copay amount prior to the televisit.** In IMS CarePortal, you can also pay the copay amount of a televisit ahead of time.

In the **Future Appointments** pane, you can review your future televisit appointments and verify the copay amount that you need to pay.

In **Future Appointments**, the **Televisit** symbol **I** indicates that the future appointment is a televisit.





To pay the copay amount prior to the televisit, follow these steps:

- 1. On the menu bar, click **Appointments**, and then click **Future/Past**.
- 2. In the leftmost column of Future Appointments, click the Pay \$amount.

H Future Appointm	ents	
	Timings 🗢	Provider 🖨
Pay \$20	May 26, 2017 01:00 AM	Morford, John
	Confirmed	
Figure 58 The Fut	cure Appointments section	

3. In **Credit Card/ACH Payment**, enter the applicable payment information.

Name on Card:						
me on Gard:			-			
it Card No:						
'Card Type:			٠			
*Expires on:	Month •	Year	×			
Zip:	01420					
"CVV:						
*Amount:	20 . 0					
	Pay Now Close	Ľ.				
actions are done	through trusted and s	ecure paym	ent gate	ways.		



47|IMS CarePorta|™

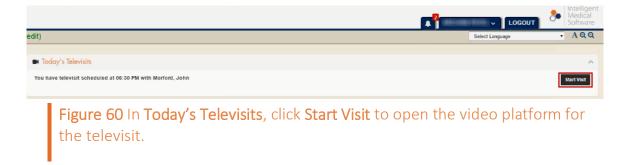


4. Click Pay Now.

**Start a televisit.** If you have a televisit appointment, you can start a televisit and open the video platform from your IMS CarePortal account.

To start a televisit from IMS CarePortal, follow these steps:

- 1. In the **Today's Televisits** pane, verify your appointment information.
- 2. Click Start Visit.



3. On the video platform, wait for the provider to join the televisit session.



Figure 61 On the video platform, wait for the provider to join the televisit session to begin the appointment.





You are checked in when both you and the provider join the televisit.

# **Health Record**

In the Health Record module, you can view, download, or transmit your documents in Documents. You can also view your healthcare information in Careplan, Labs, Prescription, and Immunization.

Access a document. To access a document in **Documents**, follow these steps:

- 1. On the menu bar, click Health Record, and then click Documents.
- 2. In **Documents**, enter your search criteria in the following:
- Visit From Date and To Date. In Visit From Date and To Date, enter the date range of the document's visit date.
- **Category**. From the **Category** list, select the type of document that you want to search.
- Upload From and To. In Upload From and To, enter the date range of the document's upload date.
- **Description**. In **Description**, enter the document's keyword.
- 3. Click Search.



**49** | I M S CarePorta|™

ν	Ocuments						
/isit	t From Date:	To Date:		Category:			
			<b>**</b>	All 🔻			
Jplo	oad From Date:	To Date:		Description:			
Do	wnload			Search		elect the checkboxes to c	download or transmit the document(s).
	wnload View/Download	Date 🗢	Category \$	Description \$		elect the checkboxes to o	download or transmit the document(s). Document Type
					Note: S		
	View/Download	Date 🗢	Category \$		Note: S		Document Type

4. Click the **View** symbol 🖹 to open a document.

You can see the number of unread documents beside **Documents**.

(	🎨 Health Record 🤰	
	Documents 2	
	Figure 63 Documents displays the number of un	read docu

**Download a document.** To download a document, do any of the following:

- To download a document, click the download symbol<sup>(1)</sup> in the View/Download column of the document that you want to download.
- To download multiple documents, select the check box of the documents that you want to download, and then click **Download**.



ments.



**Transmit a document.** To transmit a document to your provider, follow these steps:

- 1. In the leftmost column, select the check box for the document that you want to transmit.
- 2. In the **Transmit** section, do either of the following:
- Select **Direct Address** to transmit your health record to the direct address of the provider, and then enter the applicable information.
- Select **Email** to transmit your health record to the email address of the provider, and then enter the applicable information.
- 3. Click Send Health Record.

document.

it From Date:		To Date:		Category:			
	<b>**</b>		<b>*</b>	All	Y		
oad From Date:		To Date:		Description:			
	<b>m</b>		<b></b>	Search			
ownload						Note: Select the checkboxes to dow	vnload or transmit the docume
View/Download	Da	ite 🗢	Category \$	Description \$	Visit Date 🖨	Note 🗢	Document Type
× iew ④ Download		06, 2017 hent does not	HL7 Lab Results exist Q ∖iew full no	Urinanalysis Macro (dipstick) Panel - Final - 479		Received electronically	PDF Document
				Final - 479		Received electronically	PDF Document
				Final - 479 Ste		Received electronically	PDF Document
		nent does not		Final - 479 ote Transmit		Received electronically	PDF Document
		nent does not	exist Q ∨iew full no	Final - 479 ote Transmit	il address etc.)	Received electronically	PDF Document
		nent does not	exist Q ∨iew full no	Final - 479 Dte Transmit Direct Address O Email @	il address etc.)	Received electronically	PDF Document
		nent does not	exist Q ∨iew full no	Final - 479 Dte Transmit Direct Address O Email @		Received electronically	PDF Document

You can view your most recent documents in **Documents** on the dashboard.





Description	Visit Date	View/Download
2 Clinical Summary 06 (Jun 27, 2015)	Jun 19, 2015	∎ ⊕
2 Clinical Summary 06 (Jun 27, 2015)	Jun 19, 2015	<b>₽ •</b>
2 Clinical Summary 03 (Mar 27, 2015)	Mar 26, 2015	

Figure 65 Documents on the dashboard

In **Documents** on the dashboard, you can find the following:

- View. Click the View symbol 🖹 to open a document.
- **Download**. Click the **Download** symbol <sup>10</sup> to download a document.
- Show All. Click Show All to view the list of all documents in the Documents module.

Access Careplan. A care plan contains specific clinical instructions. It also contains the detailed description of your ailment and details about the treatment methods that best fit your circumstance.

To view a care plan, follow these steps:

- 1. On the menu bar, click **Health Record**, and then click **Careplan**.
- 2. In **Careplan**, enter the range of the care plan's creation date in **From** and **To**, and then click **Search**.





3. When the search results appear, click the **View** symbol is or the **Download** symbol in the **View/Download** column of a care plan to view or download the care plan.

rom Date:	To Date	Search	1
/iew/Download	Date \$	Care Plan \$	Description \$
۵ 🖻	06/10/15	Contact Dermatitis	CONTACT DERMATITIS CONTACT DERMATITIS GENERAL INFORMATION: What is it? Contact dermatitis
<b>₽ 0</b>	06/10/15	Urticaria	###

4. Review the care plan in Careplan Detail.

ß		Meditab Services Inc Google Chrome 🦳 🗖	×
	http://apportabilit	مد ما الله التي موالسانية حدور 15 ما أنيكش سائر ومن رئيست Hite برياني سائيات (مشاهر) Hite Cont	adda
		영국에 가지 것은 것에 가지 것은 것에 가지 못한 것은 것에 가지 못한 것에 가지?	L, î
	🖾 Careplan D	etail	11
	Date:	16 Apr 14	
	Care Plan:	Angina	
	Description:	ANGINA	I
		GENERAL INFORMATION: What is angina? Your heart is always working to pump blood to your entire body. Blood carries oxygen and other things that your body needs in order to do its work. Your heart needs a constant supply of oxygen-rich blood for itself as well. The blood vessels that supply blood to your heart muscle are called coronary (KOHR-oh-nar-ee) arteries. Sometimes one or more of	
	Figure 67 Th	the coronary arteries become narrowed or blocked. This may cause you to feel pain or the Careplan Detail window	•

To print the care plan, press Ctrl+P.

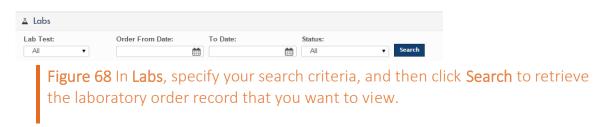




Access Labs. Labs in the Health Record module shows you the list of all the laboratory tests ordered or received by the provider for you.

To view a laboratory order on Labs, follow these steps:

- 1. On the menu bar, click Health Record, and then click Labs.
- 2. In the Labs pane, enter your search criteria in the following boxes:
- Lab Test. From the Lab Test list, select the laboratory test that you want to view.
- Order From Date and To Date. In Order From Date and To Date, enter the date range of the laboratory order's creation.
- Status. From the Status list, select the status of the order.



3. Click Search.

ab Test: All •	Order From Date:	To Date:	Status:	• Search	
.ab Test	Provider \$	Order Date	¢ Lab \$	Note \$	Status \$
Alleigens(7) F023-ige Crab F020-ige Crab F020-ige Almond F022-ige Almond F025-ige Tomato F021-ige Samon F014-ige Brazel Nut F044-ige Strawberry F017-ige Hazelun/tifbert F014-ige Red Pepper(food)		10/02/16	Labcorp	Patient's Lab Patient's Lab Patient's Lab Patient's Lab Patient's Lab Patient'sQ	To be ordered





- 4. Do either of the following:
- Click the **View full note** symbol <sup>Q</sup> to view the full note of a selected laboratory test.
- If results are already available, click the **Result** symbol <sup>II</sup> to view them.

You can view the most recent laboratory orders and results in **Labs** on the dashboard.

Provider	Lab	Lab Test
	Labcorp	Allergens(7)Q
	Envision Imaging	Flu TestQ
	Childrens Plano	CXR EnvisionQ

You can find the following features in Labs:

- View full test symbol <sup>Q</sup>. Click the View full test symbol to view the details of a laboratory test.
- **Result** symbol <sup>1</sup>. If laboratory test results are available, click the **Result** symbol to open a selected result.
- Show All. Click Show All to view the list of all laboratory orders in Labs on the Health Record module.

**View a prescription.** To view a prescription, follow these steps:

1. On the menu bar, click Health Record, and then click Prescriptions.





- 2. In the **Prescriptions** pane, enter your search criteria in the following:
- **Drug**. Enter the name of the drug in **Drug**.
- From Date and To Date. In From Date and To Date, enter the range of the drug's refill date.
- Refill Status. Select the status of the drug from the Refill Status list.
- 3. Click Search.

Drug: F	rom Date:	To Date:		Refill Status	5:		
	Last Refill From Date	Last Refill To Da	ate	All	• Search		
Approved Date							
Drug \$	Provider \$	Qty	Days	Approved Date	Last Request Status \$	Request Date \$	Refill \$
ASMANEX TWISTHALER 220 MCG # MCG (60 DOSES) (1 inhalation BID then rinse mouth after u		1	30	2016-02-25			
CUTIVATE 0.05% CREAM (BID for to 2wks stop for 1 week repeat n on face)	ot and second	30	30	2016-02-25	Pending for Approval	2019-09-09	1
PROAIR HFA 90 MCG INHALER (2 puffs every 4 to 6 hrs as needed)	110000-000000	1	30	2016-02-25	Cancelled by Patient		
XYZAL 2.5 MG/5 ML SOLUTION (5ml PO QHS)	17 (2010) - 10001000	150	30	2016-02-25	Pending for Approval	2019-09-10	2

Figure 71 Enter your search criteria in Prescriptions, and then click Search to view the prescription that you want.

#### Note:

To view the details of a drug's prior authorization, click the **Prior Authorization** symbol 🦁 of a drug.

To cancel a refill request, click the **Cancel Refill Request** symbol <sup>2</sup> of the refill request that you want to cancel, and then click **Ok** when you see the message that indicates that the request was cancelled.

To edit a refill request, click the **Edit Refill Request** symbol **a** of the refill request that you want to edit.

To view the note of a prescription's status, click the **View Status Note** symbol <sup>Q</sup> of a prescription.





**Request for a refill.** To request a refill for a drug, follow these steps:

- 1. In the **Refill Request** pane, enter the details of the refill request in the following criteria:
- Drug. Select a drug from the Drug list.

#### Note:

When you select a drug from the **Drug** list, the name of the pharmacy automatically appears in the **Pharmacy** box based on where your provider last prescribed the drug or where you last requested a refill.

When both options are applicable, the system prioritizes the name of the pharmacy where you last requested a refill.

When you add a default pharmacy in the **Profile** module, the default pharmacy appears in the **Pharmacy** box instead. For more information about how to add a default pharmacy, see *Set a default pharmacy* in "Profile".

When none of the options are applicable, the system does not enter any option in the **Pharmacy** box.

- **Refill**. Enter the number of refills for the drug in the **Refill** box.
- **Pharmacy**. Enter the name of the pharmacy in the **Pharmacy** box.

Click the **Search** symbol *q* to open the **Pharmacy** window and select a pharmacy. Click the **Reset** symbol *to* reset the **Pharmacy** box.

#### Note:

In the **Pharmacy** window, **(D)** appears on the left side of the default pharmacy, and **(P)** appears on the left side of the preferred pharmacy.





editab	Services - Google Chrome					- 0
Vot se	ecure   https://dtp064/19.1.0/patient/index	php?file=med_l	pharmacy_list&strCont	trolName=Tapharma	_name&type=3&	strControlId=TasIt_phar
iĝi F	Pharmacy					
Nam	ne: Address:	State:	City:	Zip:		
						Search
Sel	lect					
	Pharmacy Name <b>≑</b>		Address €	City \$	State 🗢	Zip 🗢
			Addless +	City +	State +	Zip ₹
	(D) Akers Pharmacy, Inc.		1595 E Garrison Blvd	Gastonia	NC	280545138
	(P) AeroFlow Healthcare		Street 250	Asheville	NC	28803
	(P) BARNETT-HONEYCUTT PHARM		Street 15	Lancaster	SC	29720
	(P) BI-LO Pharmacy #5206		Street 1093	Gastonia	NC	28054
	A Plus:Pharmac*"":&&&&		3010 Monroe Road Suite 101	Charlotte	NC	28205
	A1 Pharmacy & Surgical Supp"y \$&^		124 Forest Hill Rd	Lexington	NC	272952008

Figure 72 In the Pharmacy window, (D) appears on the left side of the default pharmacy, and (P) appears on the left side of the preferred pharmacy.

2. Click Send Refill Request.

	Refill Request	
*Drug:	AEROSPAN 80 MCG - BIN: 610020, Group: 9999 •	
*Refiil:		
Pharmacy:	Akers Pharmacy, Inc.	
	Send Refill Request Reset	
arch 2 Reset		
efill request for 'Review Pending' or 'Pending for Approval' state, cannot be sent again.		

Figure 73 In the Refill Request pane, enter the applicable information, and then click Send Refill Request to request a refill for the selected drug.

3. When you see the message that states that the refill request was sent, click **Ok**.





### Note:

Pending for Approval is the default status for the refill request.

You can view the most recent prescriptions in **Prescriptions** on the dashboard.

Prescriptions			~	
Date	Drug	SIG		
24 Jul 14	ASPIR EC 81 M			Figure 74 Prescriptions on a dashboard
				uashbuaru
Drug Education			Show All	

In the **Prescriptions** pane, click the **Drug Education** symbol **a** to get more details about the corresponding drug. Details include NDC, patient and drug education, and drug side effects.

In the **Drug Education** pane, click the following to access more functionalities:

- Click Ind./Contra Ind. to view a selected drug's indication or contraindication details.
- Click **Back to Home** to return to the dashboard.



59 | I M S CarePorta | ™

Drug Education						
Drug Usage: ASF	IR EC 81 MG TABLET ( NDC: 6210700)	2732)			Back to	Home Ind./ Contra Ind
✓ Patient Education		~	Drug Education			
Best to take with food to lesses Do not take this mediation of the sense Do not take the sense that the sense Call Drifty have black stocks or Tell doctor your complete medic. Do not take while breast feeding. Do not use longer than label or do Swallow whole with water. Do no USES: Aspirin is used to reduce fee ownalow whole with water. Do no USES: Aspirin is used to reduce fee common cold, and headches. It and swelling in conditions such as a saticylate and a nonsterioidal an It works by blocking a certain na teduce pain and swelling. Consult child younger than 12 years. The art attack. If you have recently arteries (such as bypass surgery. Side Effects	ells like vingagr us sr stomach pain i hintory or when pregnant toor direct to vin the store and the store we and relieve milit to chas muccia eacher, toothaches, that muccia eacher, toothaches, may also be used to reduce pain arthritis. Againir is known as ti-inflammatory drug (ISAD), und substance in your body to your disctor before treating a en low dose of activities and had surgers on clogged		self-treatment, follow you are uncertain abo doctor or pharmacitt. this medication, take Take this medication, take Take this medication, take taken this drug. If sto this medication, you swallow enteric-coast enteric-coasted tablet Do not crush or chew Doing so can release a of side effects. Also, unless they have a sco you to do so. Swallow or chewing. The dosage and lengtl	re taking this medicatic all directions on the po- relation of the po- ing of the point of the point of the it exactly as prescribes by mouth. Drink a full g ) with it unless your door for at least 10 min mach upper docume with door for at least 10 min mach upper docume to with the point of the point of the second of the point of the point of the second of the point of the point of the second of the point of the point of the of the second of the point of the of the second of the point of the point of the second of the point of the point of the of the second of the point of the point of the second of the point of the point of the point of the of the second of the point of the point of the point of the second of the point of the point of the point of the point of the second of the point of the point of the point of the point of the second of the point of the point of the point of the point of the second of the point of the point of the point of the point of the second of the point	oduct package. If no, consult your ted you to take I. Iaas of water (8 tor tells you tutes after you have you are taking milk. t crush or chew stomach upset. s or capsules, ncreasing the risk tease tablets or pharmacist tells t without crushing d on your medical	
Disease \$	Drug ¢	Severity \$	Frequency \$	Lab Order \$	Action \$	Hyper Sens. \$
Hemolytic Anemia	ASPIRIN	Severe	Rare	Recommended	Contact MD	
riemolyte Alternia						

**View prior authorizations.** To view your prior authorizations, follow these steps:

- 1. On the menu bar, click Health Record, and then click Prior Authorizations.
- 2. In the **Prior Authorizations** pane, enter your search criteria in the following:
- Created Date From and Created Date To. In Created Date From and Created Date To, enter the range of the prior authorization's creation date.
- **Drug**. In the **Drug** box, enter the specified drug of the prior authorization.
- Status. From the Status list, select the status of the prior authorization.
- **Outcome**. From the **Outcome** list, select the outcome of the prior authorization.
- 3. Click Search.





reated From Dat	e:	т	o Date:		Drug:		Status:			Outcome:			
		<b>m</b> ) (		<b>#</b>			All		۲	All		<ul> <li>Search</li> </ul>	
Created Date \$	Туре \$	Status \$	Outcome \$	ePA Type \$	Provider \$	Drug 🗢		Pharmacy \$			PBM \$	Effective Date \$	Expiration Date
Dec 16, 2015	P	Deleted		Classic/Fax payer	101.77114007	Accolate 10MG tab	lets	NEW MAN, STOP	100	PARAMET	Q		
Dec 16, 2015	P	Deleted		Classic/Fax payer	Hay Provider	Wellbutrin 100MG	ablets	NET Y MARCINES (	aire.	NAMES I	٩		
Dec 16, 20 <mark>1</mark> 5	Р	Deleted		Classic/Fax payer	Max/Provider/	Spironolactone 25M	/IG tablets	ADVANCES	100	REAL PROPERTY.	Q		
Dec 11, 2015	R	New		Classic/Fax payer	Aller Sellene	Pravachol 20MG ta	blets	NEW MACHEN	100	TANK (	Q		
Dec 11, 2015	Р	New		Classic/Fax payer	these Summer	Eggnog Flavor liqui	id	ARTYMAN DELY	100	PARAMACTI	Q		
Dec 11, 2015	P	New		Classic/Fax payer	Ann Concern	Spironolactone 25M	/IG tablets	ALVANCES (	-	PAGAMET	Q		
Dec 11, 2015	Р	New		Classic/Fax payer	Main Semana	Spironolactone 25M	/IG tablets	ACCUMULTED I	ane.	TANKIN'T	Q		
Dec 09, 2015	P	New		Classic/Fax payer	No. Provider	Depo-Medrol 80MC	G/ML suspension	NET COMPLETE C	No.	TARMACT	Q		
Dec 08, 2015	Р	New		Classic/Fax payer	March (Selfcens	Spironolactone 25M	/IG tablets	NEVANCES (	100	PARAMET	q		
Dec 08, 2015	P	New		Classic/Fax payer	Adden Sections	Spironolactone 25M	/IG tablets	ACCOMPANY OF A	100	THERE	Q		

Q View PBM Details P - Prospective R - Retrospective

Prior Authorization (PA) is the process of obtaining preapproval from a payer for a prescription. Electronic forms of prior authorizations are knownas ePA. For a selected drug and payer, you can view the status and outcome of the ePA as provided by the payer. You can also view the effective and expirationdate, if they are provided by the payer for the drug.

**Figure 76** In **Prior Authorizations**, enter your search criteria, and then click **Search** to view a specific prior authorization.

You can see the following in the **Prior Authorizations** pane:

- View PBM Details. Click the View PBM Details symbol *Q* to view the details of the pharmacy benefit manager (PBM).
- **Prospective**. The **Prospective** symbol **P** indicates that a provider performed the ePA check.
- **Retrospective**. The **Retrospective** symbol **R** indicates that a pharmacy initiated the ePA check.

You can view the most recent prior authorizations in **Prior Authorizations** on the dashboard. Click **Show All** to open the **Prior Authorizations** pane.



Date	Drug	Status	Outcome
Dec 16, 2015	Accolate 10MG tablets	Deleted	
Dec 16, 2015	Wellbutrin 100MG tablets	Deleted	
Dec 16, 2015	Spironolactone 25MG tablets	Deleted	

Figure 77 Prior Authorizations on the dashboard

View the prior authorization of a prescription. To view the prior

authorization of a prescription, follow these steps:

- 1. On the menu bar, click Home.
- 2. In the **Prescriptions** pane, click the **Prior Authorization** symbol *I* of a prescription.

Date	Drug	SIG
Dec 15, 2015	🛢 Wellbutrin 🎯	Take 1 daily
Dec 14, 2015	Lescol 80 MG 🦁	
Dec 14, 2015	ELESCOL XL 80	

Figure 78 In Prescriptions, click the Prior Authorization symbol of a prescription to open its prior authorization details.

3. Review the prior authorization details of the selected prescription.



								O-	' IR /	<b> S</b> <sup>™</sup>	Intellie Medic Softw
											Softw
											50100
Prior Author	izations	;									
										Back to Home	
										back to nome	
Created Date	Туре	Status	Outcome	еРА Туре	Provider	Drug	Pharmacy	PBM	Effective Date	Expiration Date	
Dec 16, 2015	Р	Deleted		Classic/Fax payer	No. Provide	Accolate 10MG tablets	NETWANETED COMPLETEMENTANCE	Q			
View PBM Detail:	s P - Pro	spective R	t - Retrospecti	ve							
	() is the pro	cess of obtaini	ng preapproval f	rom a payer for a prescripti		f prior authorizations are knownas	ePA. tiondate, if they are provided by the payer for t				

### Figure 79 The prior authorization details of a prescription

### Note:

In **Prior Authorizations**, you can view the status and outcome of a drug and payer for the selected prior authorization. You can also view the effective and expiration dates, if the payer of the drug indicates them.

**View immunization details.** To view your immunization record, follow these steps:

- 1. On the menu bar, click Health Record, and then click Immunization.
- 2. In the Immunization pane, enter your search criteria in the following:
- Given From Date and To Date. In Given From Date and To Date, enter the range of the immunization's creation date.
- **Status**. From the **Status** list, select the status of the immunization that you want to view.
- 3. Click Search.



			Medica Softwa
Immunization			
iven From Date: To I	Date: Status:	Search	
	Immunization \$	Given Date +	
Status 🗘			

Figure 80 In Immunization, enter your search criteria, and then click Search to view the immunization that you want.

To print your immunization details, click **Print Immunization**.

View and download visit note and signed forms. In Visit Note / Signed

Forms, you can view and download your visit note forms and signed forms in PDF format.

To view and download your forms, follow these steps:

- 1. On the menu bar, click Health Record, and then click Visit Note / Signed Forms.
- 2. In **Visit Note / Signed Forms**, enter your search criteria in following boxes:
- Visit From Date and To Date. In Visit From Date and To Date, enter the date range of the visit when the forms were signed or created.
- Upload From Date and To Date. In Upload From Date and To Date, enter the date range when the forms were uploaded to IMS CarePortal.
- **Description**. In **Description**, enter an applicable keyword.
- 3. Click Search.
- 4. In the View/Download column, click the View symbol 🖺 to view the form, or click the **Download** symbol 🔮 to download the form.





### Note:

The **View** and **Download** symbols are blue if the forms are not yet viewed and downloaded. The symbols become white after you view and download the forms.

sit From Date:		To Date:	L	Jpload From Date:	To Date:	Description:	
	Ħ		<b>#</b>		<b>m</b>	<b>#</b>	Search
View / Download		Date 🕶	Form Type \$	Description	n \$		Visit Date 🗢
B 0		Feb 22, 2018	Signed Form		centi (Franci		
<b>B</b> O		Feb 22, 2018	Signed Form	(Fring) and	and and the office in		
<b>B</b> O		Feb 21, 2018	Signed Form	inself transport	Contraction data in		
B 0		Feb 21, 2018	Signed Form	institute, or	contraction allows in		
<b>B</b> O		Feb 21, 2018	Signed Form	inset?issa.co	Contraction data in		
<b>B</b> O		Feb 21, 2018	Signed Form	insetTring.in	contraction allows in		
<b>B</b> O		Nov 14, 2017	Visit Note Form	1001000-00	max (3)		Nov 06, 2017
<b>B</b> O		Nov 14, 2017	Visit Note Form	int on the	max (11)		Nov 14, 2017
0		Oct 04, 2017	Visit Note Form	10071000-10	mac FE		Oct 03, 2017

View O Download X Form does not exist

Figure 81 In the Visit Note/Signed Forms column, click the View symbol to view the applicable forms or click the Download symbol to download the applicable forms.

# **Billing**

OpenEdge is integrated in IMS CarePortal to offer you enhanced features including Card On File and bills payment using credit card and ACH.

Pay via credit card. To pay via credit card, follow these steps:

1. On the menu bar, click **Billing**, and then click **Pay Bill**.



65|IMS CarePortal™

		<sup>™</sup> IMS <sup>™</sup>	Me
			20
		3	
Clinic ID: Pt. Balance: \$	\$.02(Credit)		
A Home			
Appointments	\$ Credit Card/ACH Payment		
@ ART Calendar	Patient Balance Last Statement B	a	
😻 Health Record	\$ \$.02 (Credit) \$0 View Billing Statements		
\$ Billing			
\$ Pay Bill	Payment Details:		
Payment History			
8 Billing Receipts	*Amount:		
Cuotations	Payment Method :		
Billing Statements			
E Saved Cards	Oredit Card     Oredit		
Latt Vital Signs	Save Your Card (Save your card for faster payment experience. If required you can	d	
Messages	(Save you card to raster payment experience. In required you can Menu)	v	

- 2. In the **Amount** box of the **Payment Details** section, type the amount that you want to pay.
- 3. In the **Payment Method** section, click **Credit Card**.

You can also click the **Save your card** check box to save the credit card information and use it for future transactions.

4. Click Proceed to Pay.



\$ Cre	dit Card/ACH Payment				
	\$ \$.0	ent Balance D2 (Credit) v Billing Statements	Last Statement Balance \$0	Last Payment: \$.02 20 Jan 15 View Payment History	
	Payment Details:				
	*Amount: 4				
	Payment Method :				
	Credit Card	ISA 🚺 🔤			
	Save Your Card (Save your card for fa Menu)	ister payment experience.	If required you can delete the car	d from the 'Saved Cards' option in the 'Billing'	
	O ACH				
	Proceed to Pay				

5. On the following page of **Credit Card/ACH Payment**, enter the necessary credit card information, and then click **Pay** *Amount*.

\$ Credit Card/ACH Paymer	nt			
\$	Patient Balance \$.02 (Credit) View Billing Statements	Last Statement Balance	Last Payment: <b>\$.02</b> 20 Jan 15 View Payment History	
Order Informati	on			
Total Amou Card Informatio				
	VISA Auspine	2		
Card Numbe	er:*			
Expiry Date	e:*	•	•	
CVV	*			
Customer Inform	mation			
Name on Ca	Pay \$4.00			

**Figure 84** On the following page of **Credit Card/ACH Payment**, enter the necessary credit card information, and then click **Pay Amount**.



Intelligent Medical



6. When the **Payment Response** pane opens, click **OK**.

	Successful Transaction	
Transaction ID	36013	
Paid Amount	\$6.00	
Card Number	xxxxx-xxxxx-xxxxx-4111	
Card Type	MASTERCARD	
Transaction Date and Time	Mar 07, 2019 03:09 PM	
	ок	

<b>A</b>
We can't process your payment. Please select a different payment method or check your card details.
ок



confirmation

•

68 | I M S CarePortal™



Pay via saved credit card. To pay via saved credit card, follow these steps:

- 1. On the menu bar, click **Billing**, and then click **Pay Bill**.
- 2. In the **Amount** box of the **Payment Details** section, type the amount that you want to pay.
- 3. In the Saved Credit Cards section, click the credit card that you want to use.

lit Card/ACH Pay				
\$	Patient Balance \$.02 (Credit) View Billing Statements	Last Statement Balance	Last Payment: \$.02 20 Jan 15 View Payment History	
Payment D	etails:			
*Amount:	6.			
Saved Cred	dit Cards:			
• Marrier	xxxx-xxxx-4111 Expires: 12/25			
Another Pa	yment Method :			
Oredit Card	1 🥮 VISA 👥 🚍			
I ACH				
P	roceed to Pay			
Figure 8	37 The Save	d Credit Cai	<b>rds</b> section show	ing the saved cre

#### Note:

The **Saved Credit Cards** section appears if you have saved one or more credit cards in IMS CarePortal.

When you save a credit card in IMS CarePortal, the saved card appears in IMS Patient App and IMS OnArrival.

- 4. Click **Proceed to Pay**.
- 5. When the **Password Verification** window opens, reenter your password, and then click **Submit**.



	×
assword Verification	^
Login password:	
	Submit

- 6. In the Payment Response pane, click OK.

Pay via ACH. To pay via ACH, follow these steps:

- 1. On the menu bar, click Billing, and then click Pay Bill.
- 2. In the **Amount** box of the **Payment Details** section, type the amount that you want to pay.
- 3. In the **Payment Method** section, click **ACH**, and then click **Proceed to Pay**.

~	Patient Balance	Last Statement Balance	Last Payment: \$.02
\$	\$.02 (Credit) View Billing Statements	\$0	20 Jan 15 View Payment History
Payment	Details:		
*Amount:	6.		
Payment	Method :		
Credit Ca	ard 🛛 😻 VISA 🁥 🔤		
ACH			

Figure 89 In the Credit Card/ACH Payment pane, enter the necessary information, and then click Proceed to Pay.





4. In the **ACH Information** section on the following page, enter the necessary ACH information, and then click **Pay** *Amount*.

\$ \$37	rt Balance '8.24 (Credit) Billing Statements	Last Statement Balance \$100.00 View Last Statement	Last Payment: \$1.00 31 Jun 19 View Payment History
Order Information			
Total Arr ACH Information	noumi: \$2.50		
Name on Acco Routing Number			
Account Nam Check Na	nber.4		
Pinsi N Last N	larse:		
The payment amount of \$2.5 v any reasons, 1 authorize an ad			

**Figure 90** In the **ACH Information** section on the following page, enter the necessary ACH information, and then click **Pay** *Amount*.

5. In the **Payment Response** pane, click **OK**.

**View Payment History.** To view your payment history, follow these steps:

- 1. On the menu bar, click **Billing**, and then click **Payment History**.
- 2. In the **Payment History** pane, enter your search criteria in the following:
- Receipt Date From and Receipt Date To. In Receipt Date From and Receipt Date To, enter the date range of the payment that you want to view.
- Status. In Status, enter the status of the payment that you want to view.
- 3. Click Search.



				C	<sup>≫</sup> IN	Medie Medie Softw
						Softw
Payment History						
	Patient Balance	Last Statement Balance	Last Payment: \$100.00 Received on 24 Jul 14			
\$	\$500.00 Pay Now	\$20.00 Pay Now	Received on 24 Jul 14 View Payment History			
	View Billing Statemer					
Receipt Date From:	Receipt Date To:	Status:				
	<b></b>	Paid Transaction	Search			
Receipt Date -	Receipt No 🗢	Account No/Credit Card \$		Amount \$	Payment Type \$	
24 Jul 14	REC0000004	NA		\$100.00	Cash	
22 Jul 14	REC0000001	NA		\$10.02	Cash	
* - Update Request is pending from I						

Figure 91 Enter your search criteria in Payment History, and then click Search to view the payment details that you want.

View and download a billing receipt. To view and download a billing

receipt, follow these steps:

- 1. On the menu bar, click **Billing**, and then click **Billing Receipts**.
- 2. In From Date and To Date of the Billing Receipts pane, enter the date range of the receipt that you want to view or download, and then click **Search**.

From Date:	Ê	To Date:	Search				
	Date 🕶	Receipt No \$	Payment Type 🖨	Reference \$	Rec. Amt. 🗢	Apply Amt. \$	Unapply Amt.
<b>Ł</b> 🔒	24 Jul 14	REC0000004	Cash	-	100.00	100.00	0.0
Ł 🖻	22 Jul 14	REC0000001	Cash	-	10.02	10.02	0.0

Figure 92 Enter your search criteria in Billing Receipts, and then click Search to display the billing receipt that you want to download or view.

- 3. When search results appear, do either of the following:
- Click the **Download** symbol **1** to download a billing receipt.





• Click the **View** symbol 🖻 to view a billing receipt.

**View and download a billing statement.** To view and download a billing statement, follow these steps:

- 1. On the menu bar, click **Billing**, and then click **Billing Statement**.
- In From Date and To Date of the Billing Statements pane, enter the date range of the billing statement that you want to view or download, and then click Search.

Billing Statements				
\$	Patient Balance \$500.00 Pay Now View Billing Statements	Last Statement Balance \$20.00 Pay Now View Last Statement	Last Payment: \$100.00 Received on 24 Jul 14 View Payment History	
rom Date:	To Date:			
Date \$	Statement Balance \$		Download / View	
01 Jun 14	\$20.00		Download   View	

**Figure 93** Enter your search criteria in **Billing Statements**, and then click **Search** to display the billing statement that you want to download or view.

- 3. When search results appear, do either of the following:
- Click **Download** to download a billing receipt.
- Click **View** to view a billing receipt.

The upper part of **Billing Statements** also displays the following:

Pt. Balance. Patient Balance displays your total accumulated balance. This information is also on the IMS CarePortal home page. You can point to Pt. Balance, and then click Pay Now to pay your balance.





Pt. Balance: \$75.93							Select Language
者 Home							
Appointments	▲ Labs			^	Prescriptions		
🤁 Health Record 🔟	Provider	Lab	Lab Test		Date	Drug	SIG
\$ Billing	Manual / Research	Quest Diagnostics Inc.	17 HYDROXYPREGNQ		May 31, 2016	ALLEGRA ALLER	
	100.00	Quest Diagnostics Inc.	HEMOGLOBIN A1cQ		Mar 22, 2016	LESCOL XL 80	
<u>lıl</u> Vital Signs	100.00	Quest Diagnostics Inc.	CORNQ		Mar 22, 2016	LESCOL XL 80	
🗹 Messages 😰							
Profile	Q View full test 🖪 Res	uit	Shov	r All	Prior Authorization		
🕈 Insurance	Documents			~	🛗 Future Appointm	ents	
Contacts							
	Description		Visit Date		Provider/Room	Date	
- Photos	Description Test document (Jun O	5, 2016)	Visit Date	0	Provider/Room	Date No Future Appointments	
Photos					Provider/Room		
Photos Facesheet BUE BUTTON	Test document (Jun D		B	¢	Provider/Room		
<ul> <li>Photos</li> <li>Facesheet</li> </ul>	Test document (Jun 0 HIPPA Aggrement (Ma	y 30. 2016)	B ,	¢ ¢	Provider/Room		
DOWNLOAD	Test document (Jun 0) HIPPA Aggrement (Ma Letter (Mar 16, 2016)	y 30. 2016)	B	¢ ¢	Provider/Room	No Future Appointments	Available.

**Figure 94** The patient balance is displayed in the upper-left portion of the IMS CarePortal home page.

- Last Statement Balance. Last Statement Balance shows the balance amount from your most recent statement. To pay your balance, click Pay Now.
- View Last Statement. Click View Last Statement to see a detailed view of your most recent statement.
- Last Payment. Last Payment shows you the amount that you paid on your most recent payment.
- View Payment History. Click View Payment History to see a detailed view of your payment history.

ling Statements			
\$	Patient Balance \$500.00 Pay Now View Billing Statements	Last Statement Balance \$20.00 Pay Now View Last Statement	Last Payment \$100.00 Received on 24 Jul 14 View Payment History
Figure 95 The	details displayed i	n the upper part of	Billing Statements





View and pay a quotation. In Quotations, you can view and pay for a procedure quote that was sent by your provider.

1. On the menu bar, click **Billing**, and then click **Quotations**.

l Qu	otations								
View	No. \$	Date 🗢	Description \$	Procedure(s) \$	Room \$	Total Amt.	Balance \$	Schedule Dt. \$	Pay
B	1	25 Jun 15	Quotation 1	Left	Surgery Room 1	110.00	110.00		Pay
₽	2	25 Jun 15	Quotation 2	Right	Surgery Room 2	102.00	102.00	25 Aug 15	Pay

Figure 96 Click Quotations in the Billing module to view the list of quotations.

- 2. In **Quotations**, click the **View** symbol imes in the first column to open a detailed view of the quotation.
- 3. In **Quotations**, click **Pay Now** in the last column of the quotation that you want to pay.
- 4. Enter the applicable payment information, and then click **Pay Now**.

Quote No - 1			
Description:	Quotation 1	Quote Date:	2015-06-25
Provider:	Harada ( Hara)	Room:	Surgery Room 1
Procedure:	Left	Scheduled Date:	
Total Amt:	110.00	Amount Due:	110.00
*Name on Card:			
*Credit Card No:			
*Card Type:	▼		
*Expires on:	Month VYear V		
Zip:			
CVV:			
	Save on Card		
*Amount:	110.00		
	Pay Now		
		10 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	c

**Figure 97** To complete a payment, enter the applicable payment information of the quotation on the quote payment page, and then click **Pay Now**.

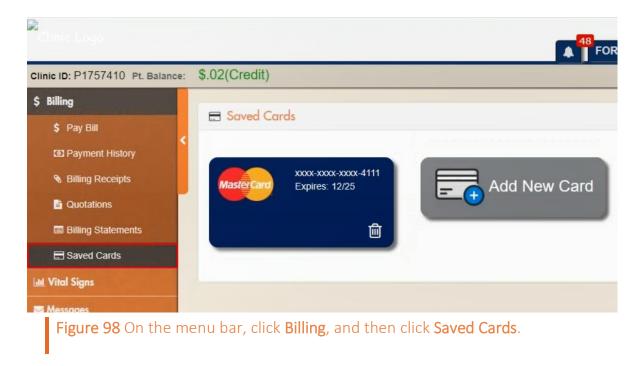




5. When the message indicating the success of the transaction appears, click **Ok**.

Add a credit card. To add a credit card, follow these steps:

1. On the menu bar, click **Billing**, and then click **Saved Cards**.



- 2. In the Saved Cards pane, click Add New Card.
- 3. In the Add New Card window, select the I agree to the Terms and Conditions check box, and then click Continue.



dd New Card	
Terms and Conditions	\$
Payment Card Industry	our credit card, then our payment processing partner stores your credit card data. It is encrypted through the Data Security Standard (PCI-DSS). For security, IMS CarePortal does not collect or store sensitive cardholder card numbers or card authentication data.
Refund Policy - To requ	lest a credit/refund, please contact the practice directly.
I agree to the Terms	and Conditions

4. Enter the necessary credit card information, and then click **Save**.

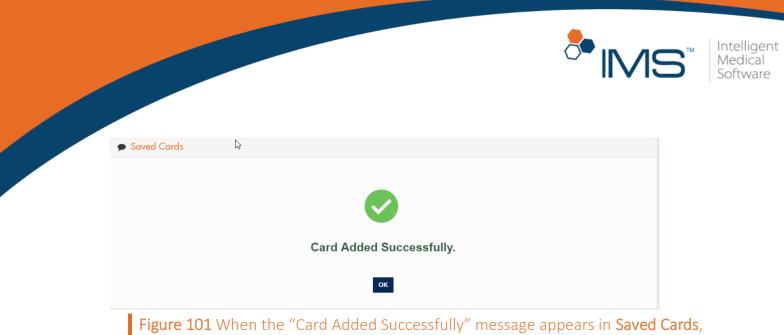
Card Informat	ion	
Card Number.*	In change and we have	
Expiry Date:*	12 • 2025 •	
CVV.* 👔		
Customer Info	ormation	
Name on Card:	10750007405x0127400x0	
	Save	

Figure 100 In the following window of Add New Card, enter the necessary credit card information, and then click Save.

5. When the "Card Added Successfully" message appears, click OK.



Intelligent



click OK.

Remove a credit card. To remove a credit card, follow these steps

- 1. On the menu bar, click **Billing**, and then click **Saved Cards**.
- 2. In the **Saved Cards** pane, click the **Delete** symbol **u** to remove the credit card.
- 3. When the "Do you want to delete this card?" message appears, click OK.

# Vital Signs

You can view your recorded vital signs in the Vital Signs module.

View Vital Signs. To view details of your vital signs, follow these steps:

- 1. On the menu bar, click Vital Signs, and then click View.
- 2. In Vital Signs, enter the applicable date range in From Date and To Date.
- 3. Click Search.



								Ō		15	<b>S</b> ™	Intellige Medica Softwar
L Vito	al Sign: ate:		To Date:	Search								
	ate:		To Date:	Search	1					Vital Graphs		
	ate:	Ē		Temperature (F)	Blood Pressure	Pulse	Blood Sugar (F)/(NF)	Respiration	Peak Flow	Vital Graphs Oxygen	BMI	
	ate: Add	d Vital Sign			-	Pulse	Blood Sugar (F)/(NF)	Respiration	_		BMI	

S - View More - Hide More - Edit + - Add request is pending from Provider's office.

Figure 102 In Vital Signs, enter the applicable date range in From Date and To Date, and then click Search to view the recorded vital signs.

### Note:

Click the **View More** symbol 🔁 for the applicable date to view more details.

		t		Search							
		Add Vital Sign								Vital Graphs	
		Date	Weight (L)	Temperature (F)	Blood Pressure	Pulse	Blood Sugar (F)/(NF)	Respiration	Peak Flow	Oxygen	BMI
3	ø	2019-08-20 *	97.00								
•	œ	2019-08-20 *	97.00								
			FeNO_2 0.00								

Figure 103 The section that shows additional details when you click the View More symbol

Add Vital Signs. To add details of your vital signs, follow these steps:

1. On the menu bar, click Vital Signs, and then click Add.

### Note:

You can also add new vital signs in **View** of the **Vital Signs** module by clicking the **Add Vital Sign** button.

- 2. In the Add Vital Signs pane, enter the applicable information.
- 3. Click Save to add new vital signs.



Add Vital Signs							
*Taken Date:				Time:	00:00	AM .	T
Weight:	lbs v		Oz:				
Temperature:							
Blood Pressure:	(Fahrenheit)						
Blood Pressure:	(Systolic) /	(Diastolic)					
Pulse:							
Blood Sugar:							
Respiration:	(Fasting) /	(Non-Fasting)					
Peak Flow:							
Oxygen:							
FeNO:							
FeNO_2:							
			Save C	ancel			

**Generate a graph for vital signs.** To generate a graph for the recorded vital signs, follow these steps:

- 1. On the menu bar, click Vital Signs, and then click Graphs.
- 2. In the **Graph for Vital Signs** pane, enter the applicable information in the following filter criteria:
- Style. Select the style of the graph from the Style list.
- Vital Sign. Select the recorded vital signs from the Vital Sign list.
- No. of visits. Select a particular number of visits for the recorded vital signs from the No. of visits list.



80 | I M S CarePortal™

Intelligent Medical Software

🔟 Graph for Vital Signs			
Style:	Vital Sign:	No. of visits:	Search

**Figure 105** In the **Graph for Vital Signs** pane, enter the applicable information to filter the graph that you want to generate.

## 3. Click Search.



Figure 106 In the Graph for Vital Signs pane, click Search to generate the graph.

You can only generate the vital signs that are imported in IMS. You cannot generate pending vital signs.

### Note:

Click the maximize symbol domain to maximize the graph. If the graph is maximized, click the minimize symbol domain to minimize the graph.



🍊 IN /



# Messages

With the **Messages** module, you can send messages to or view messages from your provider's office.

Read a message. To open and read a message in Messages, follow these steps:

- 1. On the menu bar, click **Messages**, and then click **View**.
- 2. In the **Messages** pane, click the **Sent** tab or the **Received** tab, depending on what type of message that you want to view.

### Note:

The **Messages** pane opens the **Received** tab by default.

Keyw	ord: From	n Date: To Date:	
		Search	Compose Message
Sent	t Received		
	From \$	Message \$	Date \$
	Steve, Dirks	Hello Alice, Please visit the office on Monday. Schedule an app	Sep 21, 2017
	Clinic	Hey, It's time for your shots. Please visit the office.	Jun 07, 2017
	John, Smith	Call the office and book your followup appointment	Jun 07, 2017
$\geq$	Clinic	Perform the test as suggested and discuss with Maria on call	Jun 07, 2017
$\searrow$	Nancy, Bray	You need to bring your prescription.	Jun 07, 2017
$\checkmark$	Nancy, Bray	Please visit the office	Jun 07, 2017

Figure 107 To view a message in Messages, click the Sent or Received tab.

- 3. Filter the messages using the following criteria:
- Keyword. In Keyword, enter the applicable keyword.





- From Date and To Date. In From Date and To Date, indicate the date range that covers the date when the message was sent or received.
- 4. On the results list, click the message symbol in the leftmost column.

A message can be **Unread ≥**, **Read ≥**, or **Private Message ≥**.

You can see the number of unread messages beside Messages.

🖂 Messages 🕦	
🖋 Compose	
⊠ View 1	

Figure 108 The Messages module displays the number of unread messages.

**Compose a new message.** To compose and send a new message, follow these steps:

- 1. On the menu bar, click **Messages**, and then click **Compose**.
- 2. In the **Compose a Message** pane, enter the name of the recipient of your message in **To**, type your message in **Message**, and then click **Send**.

#### Note:

It is necessary to type your message in the **Message** box. The **To** box is optional.

You can send a private message to your provider if your message is confidential. If you want your message to be private, select the **Is Private?** check box.

3. Click **Ok** when the "Your message has been sent successfully. We will call you back, if required." message appears.



✓ Compose a Message	
r Messa	
Disclaimer: Care Portal is only cl call our office directly	Send Clear Red during the normal office hours and will be responded within 24-48 Business hours. This message portal is only for issues of a non-urgent nature. If you have a medical emergency/problem please

You can also view your most recent messages in Messages on the dashboard.

View	Message	Date		
	Your appointment request has	Jun 19, 2015		
	Your appointment request wit	Apr 23, 2015		
	hello	Mar 27, 2015		
Unread	🖂 Read 🔒 Private	Compose Show A		

In **Messages** on the dashboard, do either of the following:

- Click **Compose** to compose and send a message to the provider.
- Click **Show All** to view your messages in the **Messages** module.





# Profile

You can view your account information in the **View** pane of the **Profile** module. You can also change your password and username and edit your profile.

Update demographic information. To update your demographic

information, follow these steps:

- 1. On the menu bar, click **Profile**, and then click **Edit Profile**.
- 2. In the **Edit Profile** pane, enter the applicable information.
- 3. Click Save.

Edit Profile *				
*First Name:		Middle Name:	*Last Name:	
A.K.A.:	1			
*Date Of Birth:				
*Sex:	Male			
*Street:	00, Northern Street			
*Zip:		*City:	*State:	
Phone (Home):	(000)-000-			
Phone (Work):	(000)-000-			
Cell:	(000)-000-			
Fax:				
*Email:				
Marital Status:	Single •			
Education:	College V			
Employment:	Unknown	_		
	Save Cancel			
Figure 11:	L To edit your profil	le, make changes in	i <b>Edit Profile</b> , a	nd then click <b>S</b>

4. When the "Your request for editing personal detail has been sent successfully." message appears, click **OK**.

You can add your PHI reference link in the PHI Reference link box of the Edit Profile pane. Enter the link in the PHI Reference link box, and then click Verify so that the system verifies the link that you entered.





**Change password.** To change your password, follow these steps:

- 1. On the menu bar, click **Profile**, and then click **View**.
- 2. In the Profile pane, click Change Password.
- 3. When the **Change Password** pane appears, enter the applicable information in the following boxes:
- Old Password. Type your current password in Old Password.
- New Password. Type your new password in New Password.

Your password must have a minimum of 8 and a maximum of 25 characters. It must have one numeric value and one special character. It must also not be the same as your username.

• Confirm New Password. Type the new password again in Confirm New Password.

🛔 Ch	ange Password	
	"Old Password:	
	*New Password:	
	*Confirm New Password:	
		Submit Cancel
Note:	asswords must be between 8 to 25 cha	aracters in length
o F		ric value and 1 special character (!,@,#,\$,%,^,&,*,?,_,(,),~,-,+,=).
	<b>gure 112</b> Enter the appl assword.	licable information in Change Password to



86|IMS CarePortal™



- 4. Click Submit.
- 5. When the "Your Password has been changed Successfully." message appears, click **OK**.

**Change username.** To change your username, follow these steps:

- 1. On the menu bar, click **Profile**, and then click **View**.
- 2. In the **Profile** pane, click **Change Username**.
- 3. When the **Change Username** pane appears, enter the applicable information in the following boxes:
- Current Username. Type your current username in Current Username.
- Password. Type your current password in Password.
- New Username. Type your new username in New Username.
- Confirm New Username. Type the new username again in Confirm New Username.

🛔 Change Username	
*Current Username:	
*Password:	
*New Username:	
*Confirm New Username:	
	Submit Cancel
Note: You can change the Username only once.	
Figure 113 Enter the de	tails in <b>Change Username</b> to change your u

4. Click Submit.



ername.



5. When you receive a message that states that your username has been changed, click **OK**.

#### Note:

You can change your username once only.

If you created your username by registering to the portal, you can no longer change your username in the **Profile** module.

Edit security questions. To edit your security questions, follow these steps:

- 1. On the menu bar, click **Profile**, and then click **View**.
- 2. In the **Profile** pane, click **Edit Security Question**.
- 3. When the **Password Check** pane opens, enter your password, and then click **Submit**.

B P	assword Check
Ple	ase provide password to edit security question.
	Password:   Submit
	Figure 114 In the Password Check pane, enter your password, and then click Submit to open Security Questions.

4. Make the necessary changes in the **Security Questions** pane, and then click **Submit**.



Security Questions			
Please select security questions and answer them properly below. This will he	Ip us to confirm your identity in future.		
'First Question:	In which year did you start High school		
*Answer	2009		
Hint	two thousand nine		
"Second Question:	What is you favourite Country	٠	
'Answer	India		
Hint			
"Third Question:	In which city, you had your first job?	•	
	Ahmedabad		
Hint			
	Submit Cancel		

### Note:

After you edit your security questions, the system automatically sends a confirmation to your email that you have changed your security questions.

## Set a default pharmacy. To set a default pharmacy, follow these steps:

- 1. On the menu bar, click **Profile**, and then click **Edit**.
- 2. In **Pharmacy** of the **Edit Profile** pane, click the **Select Default Pharmacy** symbol
- 3. In the leftmost column of the **Default Pharmacy** window, select the check box for the applicable default pharmacy.

You can select only one default pharmacy.





	Pharmacy Name \$	Address \$	City \$	State \$	Zip \$
ł	Akers Pharmacy, Inc.	1595 E Garrison Blvd	Gastonia	NC	280545138
1	A Plus:Pharmac****:&&&&	3010 Monroe Road Suite 101	Charlotte	NC	28205
0	A1 Pharmacy & Surgical Supp"y \$&^	124 Forest Hill Rd	Lexington	NC	272952008
1	A2Z Heath Mart Pharmacy	Street 31	Charlotte	NC	28210
в	ABERDEEN PRESCRIPTION SHOPPE	Street 208	Aberdeen	NC	28315
	Accredo"	Street 2134			
0	Adams Farm Pharmacy	Street 944	Greensboro	NC	27407
0	Advanced Home Care	6000 E. Broadway	Bloomington	MN	55425
3	AeroFlow Healthcare	Street 250	Asheville	NC	28803
9	Aetna Rx Home Delivery	2528 NW 19th Street	Pompano Beach	FL	33069

**Figure 116** In the leftmost column of the **Default Pharmacy** window, select the check box for the applicable default pharmacy.

4. Click Select.

ditab	Services - Google Chrome					- 0
lot se	cure   https://dtp064/19.1.0/patient/inc	dex.php?file=me	d_pharmacy_list&strC	ontrolName=	Tapharma_name&typ	e=1&strControlId=TasIt_pharm
1 <b>C</b> 11 C	Default Pharmacy					
Nam	ne: Address:	State:	City:		Zip:	
						Search
	_					
Sele	lect J					
	Pharmacy Name ≑		Address \$	City \$	State \$	Zip \$
	Akers Pharmacy, Inc.		1595 E Garrison Blvd	Gastonia	a NC	280545138
۲	A Plus:Pharmac**** &&&&		3010 Monroe Roa Suite 101	d Charlotte	e NC	28205
	A1 Pharmacy & Surgical Supp"y \$&*		124 Forest Hill Rd	Lexingto	on NC	272952008
	A2Z Heath Mart Pharmacy		Street 31	Charlotte	e NC	28210
	ABERDEEN PRESCRIPTION SHOP	PE	Street 208	Aberdee	en NC	28315

Figure 117 In the Default Pharmacy window, click Select to confirm your selection.





5. When the "Do you want to add previous pharmacy to patient's preferred pharmacy" message appears, click **Yes**.



**Figure 118** When the "Do you want to add previous pharmacy to patient's preferred pharmacy" message appears, click **Yes** to proceed.

### Note:

The message appears only if you set a default pharmacy previously. Otherwise, the message does not appear, and the **Default Pharmacy** window closes after you click **Select**.

The selected pharmacy appears in the **Pharmacy** box of the **Edit Profile** pane.

Clinic ID: P1657527					
e Home	a she di				
E Appointments	C Edit Profile				
👽 Health Record 🕕	"First Name:	PL		Middle Name:	Patt
\$ Niling	AKA:	100			
Lat Vitel Signa	*DOB:	12-12-1907			
I Messages	"Sex:	Feitale			
▲ Profile	"Street	abod			
(7 Edit	"Zip:			'ORY:	
Vew	-2p.	02459		-oty.	newton center
+ Insurance	Phone (Home):	(Yor) and here have	668		
Contacts	Phone (Work):	201-002740-027	RINGSR		
E Pasta	Cell:	2010-009-0008			
E Focasheet	Fax:	1000,000,000			
	'Enait:	any other directed			
	Pharmacy	Aetna Rx Home Del	Very	0.0 +	
	Marital Status:	1 8			

Add a preferred pharmacy. To add a preferred pharmacy, follow these steps:

1. On the menu bar, click **Profile**, and then click **Edit**.





- In Pharmacy of the Edit Profile pane, click the Selected preferred pharmacy(s) symbol +.
- 3. In the leftmost column of the **Preferred Pharmacy** window, select the check box for the applicable preferred pharmacy.

#### Note:

You can select one or more preferred pharmacy. The current default pharmacy is no longer included in the list.

lam	ie:	Address:	State:		City:		Zip:		Search
Sav	e								
2	Pharmacy Na	ame \$		Addres	ss ‡	City \$		State \$	Zip \$
2	Akers Pharmacy, Inc.			1595 E Blvd	Garrison	Gastonia		NC	280545138
	A Plus:Pharmac****:&&&&			3010 M Suite 1	Ionroe Road 01	Charlotte		NC	28205
3	A1 Pharmacy & Surgical Supp"y \$&^		124 Fo	rest Hill Rd	Lexington		NC	272952008	
	A2Z Heath Mart Pharmacy		Street :	31	Charlotte	e	NC	28210	
3	ABERDEEN PRESCRIPTION SHOPPE		Street 2	208	Aberdeen		NC	28315	
	Accredo"		Street 2134						
3	Adams Farm	Pharmacy		Street	944	Greensb	oro	NC	27407
	Advanced Ho	me Care		6000 E	. Broadway	Blooming	gton	MN	55425
3	AeroFlow Hea	althcare		Street 2	250	Asheville	9	NC	28803
						[1 to 10 of	2176] 21	18 Page(s): « 1 2 ;	345678910 > »
						[1 to 10 of	2176] 21	18 Page(s): « 1 2 3	345678910 ›»

check box for the applicable preferred pharmacy.





4. Click Save.

The selected pharmacies appear when you point to the **Selected preferred pharmacy(s)** symbol • in the **Edit Profile** pane.

"First Name:	1911			Middle Name:	Page 1
AKA:	Temp				
*DOB:	10.05.087	<b>m</b>			
*Sex:	Female	•]			
*Street:	abcd		1		
*Zip:	10499			"City:	newton center
Phone (Home):	(70) dis ben sola	04040	)		
Phone (Work):	2010/08/02/14/02/19	eniter en			
Cell:	(101-203-2030)	3			
Fax:	( prosp. dens. dense	1			
"Email:	and the gradient	100			
Pharmacy	Aetna Rx Home Deliv	very	90	*	
Marital Status:		•		2) BEATTIES FORD F	
Education:	(	•]	L	3) BI LO PHARMAC	7.3214
Employment:		•			

Figure 121 The selected pharmacies appear when you point to the Selected preferred pharmacy(s) symbol in the Edit Profile pane

If you click the **Selected preferred pharmacy(s)** symbol + again to open the **Preferred Pharmacy** window and set another preferred pharmacy, the existing preferred pharmacies appear at the top of the list.





Intelligent
Medical
Software

inecol polyc	ervices - Google Chrome					- 0
t sec	ure https://dtp064/19.1.0/patient/	/index.php?file=m	ed_pharmacy_list&strCon	trolName=Taslt_se	c_pharmacy_name8	ktype=2&strControlld=
I P	referred Pharmacy					
Nam	e: Address:	State:	City:	Zip:		
						Search
-						
Save	Bi l					
	Pharmacy Name \$		Address \$	City \$	State \$	Zip \$
	Pharmacy Name \$		1595 E Garrison	<b>City ≑</b> Gastonia	State 🗢 NC	Zip \$
	•			-		
•	•		1595 E Garrison	-		
•	Akers Pharmacy, Inc.		1595 E Garrison Bivd	Gastonia	NC	280545138
2	Akers Pharmacy, Inc. BEATTIES FORD RD HLTH DEPT		1595 E Garrison Blvd Street 33 Street 1911 3010 Monroe Road	Gastonia Charlotte	NC NC	280545138 28216
2	Akers Pharmacy, Inc. BEATTIES FORD RD HLTH DEPT BI LO PHARMACY 5214		1595 E Garrison Blvd Street 33 Street 1911	Gastonia Charlotte Gaffney	NC NC SC	280545138 28216 29340
	Akers Pharmacy, Inc. BEATTIES FORD RD HLTH DEPT BI LO PHARMACY 5214		1595 E Garrison Blvd Street 33 Street 1911 3010 Monroe Road	Gastonia Charlotte Gaffney	NC NC SC	280545138 28216 29340

**Figure 122** In the **Preferred Pharmacy** window, the existing preferred pharmacies appear at the top of the list.

# Insurance

You can view and edit your insurance details in the **Insurance** module. You can view the list of your insurances by clicking **View** in the **Insurance** module. You can also add a new insurance.

Add an insurance. To add an insurance, follow these steps:

- 1. On the menu bar, click **Insurance**, and then click **Add**.
- 2. In the Add New Insurance Request pane, enter the applicable information, and then click Save.



Add New Jersen Press			
Add New Insurance Reque *Insurance:	▼ ▼	● Primary ◎ Secondary ◎ Tertiary ◎ Other	
*Insurance ID:			
Group No:			
Start Date:	(		
End Date:	<b></b>		
*Insured By:	Self		
Note:			
	Save Cance		

3. When the "Your request for save insurance detail has been sent successfully." message appears, click **Ok**.

Edit an insurance. To edit an insurance, follow these steps:

- 1. On the menu bar, click Insurance, and then click View.
- 2. In the **Insurance** pane, click the **Edit Insurance symbol** of the selected insurance.

sur	ance					
Ne	w Insurance					
	Insurance \$	Insurance ID \$	Insured By \$	Priority \$	Start Date 🗢	End Date 🖨
	Test Meditab Insurance	56433456	Self	Primary		
	Unknown Insurance	13456	Self	Secondary		
	Test Meditab Insurance*	564644	Self	Secondary		
2	Test Meditab Insurance*	9856452	Self	Tertiary		
/	Test Meditab Insurance*	9856452	Self	Tertiary		

Edit Insurance \* - Update Request is pending from Provider's office.

Figure 124 To edit an insurance, click the Edit Insurance symbol in Insurance.





3. Make the necessary changes in the **Update Insurance Request** pane, and then click **Save**.

🕈 Update Insurance Request	*	
*Insurance:	Test Meditab Insurance	◎ Primary      Secondary      Tertiary      Other
*Insurance ID:	564644	
Group No:		
Start Date:	<b></b>	
End Date:	<u> </u>	
*Insured By:	Self	
Note:		
	Save Cance	
* = Update Request is pending from [	Doctor's office.	
Figure 125 Make	changes in Update Insurance	Request to edit an insurance.

4. When the "Your request for save insurance detail has been sent successfully." message appears, click **Ok**.

When you update or add an insurance request, and then you select a sponsor for your insurance from the **Relation** list, the system opens the **Insured By** section.





*Insurance:			•	Primary Secondary Tertiary Oth
*Insurance ID:			)	
Group No:				
Start Date:				
End Date:				
*Relation:	Mother		•	
Date of f			t	
*Last N	ame:			
Date of I			<b></b>	
	Sex:	•		
Add	ress:			
	Zip:			
Note:				]
				- le

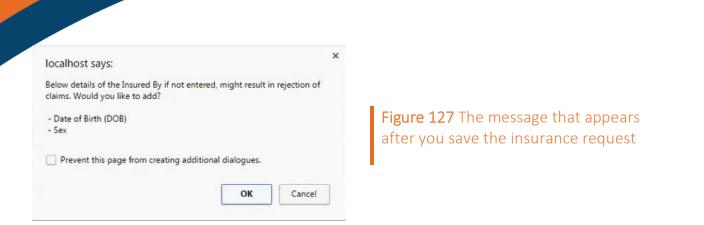
### Figure 126 The Insured By section

When you save the insurance request and you enter neither one nor both of the date of birth or the sex of the insurance sponsor in the **Insured By** section, the "Below Detail(s) of the Insured By if not entered, might result in rejection of claims. Would you like to add?" message appears.

Do any of the following:

- Click **OK** to enter the name of the insurance sponsor, and then save the insurance request.
- Click **Cancel** to close the message, and then save the insurance request.





# Contacts

You can view and add contact details in the **Contacts** module.

**View contacts.** To view your existing contacts, click **View** in the **Contacts** module.

Entity	Name	Phone	Fax	Direct Address
Patient				
Patient Work	interna i statera	10.00	an ingeneration	
Patient Home	-10.00 - 10.001	an and a state of the state of	an income owner.	
Patient Cell	inter-state	10.000000000000000000000000000000000000	10 10 10 10 10 10 10 10 10 10 10 10 10 1	
Insurance	synthetic and in the second second			
Insurance	The Administration of the Administratio of the Administration of the Administration of t			
Nurse Manager				
Nurse Manager*	Holds, obtained			
Emergency Contact 1				
Emergency Contact 1	Seen Seen	111110001000		
Claim Adjuster				
Claim Adjuster*	10.000 - 0.000	-900 c mar - 000 c		
Bill To				
Bill To	ieres Jeres	100011000		

## Figure 128 The Contacts pane



Intelligent Medical



### Note:

The star symbol **\*** indicates that the entry is a new contact, and it still requires your provider's approval.

## Add a new contact. To add a new contact, follow these steps:

1. On the menu bar, click **Contacts**, and then click **Add**.

### Note:

You can also add a new contact by clicking **Add New Contact** in **View** of the **Contacts** module.

 In Add New Contact, enter the applicable contact information, and then click Save.

📽 Add New Contact		
*Type:	▼	
*First Name:		
*Last Name:		
*Date Of Birth:	<b>*</b>	
Gender:	▼	
Address:		
Zip:		
*Phone (Home):		
Phone (Work):		
Cell:		
Fax:		
Email:		
	Save Cancel	

Figure 129 In Add New Contact page, enter the applicable contact information, and then click Save to add a new contact.





3. When the "Your request for save insurance detail has been sent successfully." message appears, click **Ok**.

# **Photos**

You can view the photos uploaded by the clinic or upload your own photos in the **Photos** module.

**View photos.** To view your photos, follow these steps:

- 1. On the menu bar, click **Photos**.
- 2. Do either of the following:
- Click the **Patient Photos** tab to view photos that your provider uploaded for you.
- Click the **Pending Photos** tab to view photos that you uploaded.



Photos.

3. Click the photo that you want to view.





Add a new photo. To add a new photo, follow these steps:

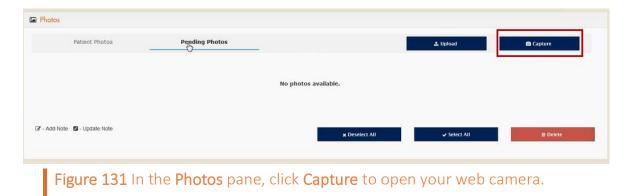
- 1. On the menu bar, click Photos.
- 2. Click Upload.
- 3. Select a photo that you want to upload from your computer.

### Note:

Uploaded photos are considered pending until approved and saved by the provider's office. You can view your uploaded photos in the **Pending Photos** tab in the **Photos** module.

**Capture a photo.** If you have a web camera in your computer, you can capture a photo and add it in the **Pending Photos** tab. To capture a photo, follow these steps:

- 1. On the menu bar, click **Photos**.
- 2. In the Photos pane, click Capture.



3. When your web camera opens, click **Shoot** to capture the image.









Figure 132 Click Shoot to capture the image.

- 4. Do either of the following:
- Click **Upload** to upload the captured image.

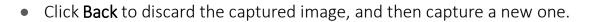




Figure 133 You can click Upload to upload the captured image, or click Back to discard the captured image, and then capture a new one.

### Note:

Captured photos are considered pending until approved and saved by the provider's office. You can view your captured photos in the **Pending Photos** tab of the **Photos** module.





Add a note to an uploaded photo. You can also add a note to your uploaded photo. To add a note to your uploaded photo, follow these steps:

- 1. To view the photo that you uploaded in **Photos**, click the **Pending Photos** tab.
- 2. Click the add note symbol *c* to add a note for your uploaded photo.
- 3. In Add Note, type your note, and then click Save.

Add Note	
Note:	
	Save Cancel

Figure 134 In Add Note, enter your note, and then click Save.

### Note:

The add note symbol changes to the view note symbol *if* the photo has a note. Click the view note symbol *if* to view the note of an uploaded photo.

You can also find the following buttons in **Pending Photos**:

- Deselect All. Click Deselect All to clear the selection of all photos in Pending Photos.
- Select All. Click Select All to select all photos in Pending Photos.
- Delete. Click Delete to delete selected photos in Pending Photos.





# Facesheet

You can view the overview of your healthcare information in the **Facesheet** module.

You can view the following information in Facesheet:

- Patient demographics
- Insurances
- Cases
- Contacts
- Prescriptions

ace Sheet		
Print FaceSheet	Case: All Cases	
		🖞 All 🎓 Insurance(s) 🖿 Case(s) 🖉 Contact(s) 🖉 Prescription(s)
	Handhan - Yanfhanan i Ian. (Santanan Phanan: (2003) 2003 (2003)	
Patient:	Sex:	DOB:
Address:	Phone(s):	Fax:
Email:	Ethnicity:	Marital Status:
Allergies:		Pref. Language:
✤ Insurance(s)		*
Case(s)		~
📽 Contact(s)		~
Prescription(s)		~

Figure 135 The Face Sheet pane





You can do the following in Facesheet:

- To print your face sheet, click **Print FaceSheet**.
- To view a specific case in **Face Sheet**, click **Case(s)**, and then select the case that you want to access.
- To expand a section in Face Sheet, click the expand symbol 🔽.

Case: All Cases	•
	đ All 🎓 Insurance(s) 🖿 Case(s) 🖉 Contact(s) 🗷 Prescription(s
Handhall (Burkana) (an Hankana) Phanair (100) (100) (1001	
Sex:	DOB:
Phone(s):	Fax:
Ethnicity:	Marital Status:
	Pref. Language:
	~
	~
	~
	Sex: Phone(s):

- Figure 136 Click the expand symbol to maximize the section.
- To collapse an expanded section in Face Sheet, click the collapse symbol



ice Sheet								
nt FaceSheet		Case: All Case						
I Taleoneet		PRI GRIER			🖄 All 🖈 Insurance(s) 🖿 Case(s) 볼 Contact(s) 🕼 Prescrip			
		100						
Patient:		Sex:				DOB:		
Address:		sex: Phone(s):				Fax:		
Email:		Ethnicity:			Marit	al Status:		
Allergies:					Pref. L	anguage:		
Insurance(s)								
surance	ID	Group No.	Priority	Start Date	End Date	0	Tur	
surance		Group No.	Primary	Start Date	End Date	Copay	Typ	
1known Insurance	1000		Secondary			NA	P	
e: P = Patient Insurance C = Case Ins	urance							
Case(s)								
escription	Case Type	Start Date	Injury Date	Provider		Hospital		
ice Lift	Surgery	25 Aug 15	25 Aug 15	10.01100000				

# **Blue Button**

You can view, download, and send your health record using the Blue Button functionality. To access Blue Button, click **BLUE BUTTON DOWNLOAD HEALTH RECORD** in the IMS CarePortal menu bar.



106∣IMS CarePortal™

<sup>\_\_</sup> IV/

Intelligent Medical



Health Record		
From Date: To Date:		
View your health record.	Download your health record. (Human Readable Format)	Download your health record.
	Transmit	
	Direct Address 💿 Email O	
*Direct Address of the Provider:		
	Send Health Record	
*Direct Address of the Provider:	Transmit Direct Address	

**Figure 138** When you click **BLUE BUTTON DOWNLOAD HEALTH RECORD** in the IMS CarePortal menu bar, the system opens the **Health Record** pane.

In the **Health Record** pane, select the applicable dates of the data that you want to access in **From Date** and **To Date**, and then do any of the following:

- View your health record. Click the View your health record symbol 🖤 to view your heath record.
- Download your health record (Human Readable Format). Click the Download your health record (Human Readable Format) symbol to download your health record in a human-readable format.
- Download your health record. Click the Download your health record symbol
   to download your heath record.

**Transmit your health record.** You can transmit your health record either to the direct address or the email address of the provider.





To transmit your health record, follow these steps:

- 1. In the Transmit section of the Health Record pane, select any of the following:
- **Direct Address**. Select **Direct Address** to transmit your health record to the direct address of the provider.
- Email. Select Email to transmit your health record to the email address of the provider.

		Transmit	
	Direct Address 🗿	Email O	
*Direct Address of the Provider:			
	9	Send Health Record	
Figure 139 The Tra	nsmit section	of the <b>Health</b>	Record pane

- 2. Do either of the following:
- After you select **Direct Address**, enter the direct address of the provider in the **Direct Address of the Provider** box.

		Transmit			
	Direct Address 🗿	Email O			
*Direct Address of the Provider:					
	s	end Health Record			
Figure 140 The opt Transmit section	tion that appe	ars when yo	ou select	Direct Ac	ldress in the





• After you select **Email**, enter the email address of the provider in the **Recipient Email Address** box.

		Transmit
		Direct Address O Email O
*	Recipient Email Address:	
Add a note:		Enter your contact information (e.g email address etc.)
		Send Health Record
	Figure 141 The optio section	ons that appear when you select <b>Email</b> in the <b>Transmit</b>

You can also add a note in the **Add a note** box.

3. Click Send Health Record.



