Intelligent
Medical
Software

IMS CarePortal™ User Guide for Patients

Version 21

Published on: September 2019

Contents

Introduction

This document gives you complete instructions on how to use the IMS CarePortal™ 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.

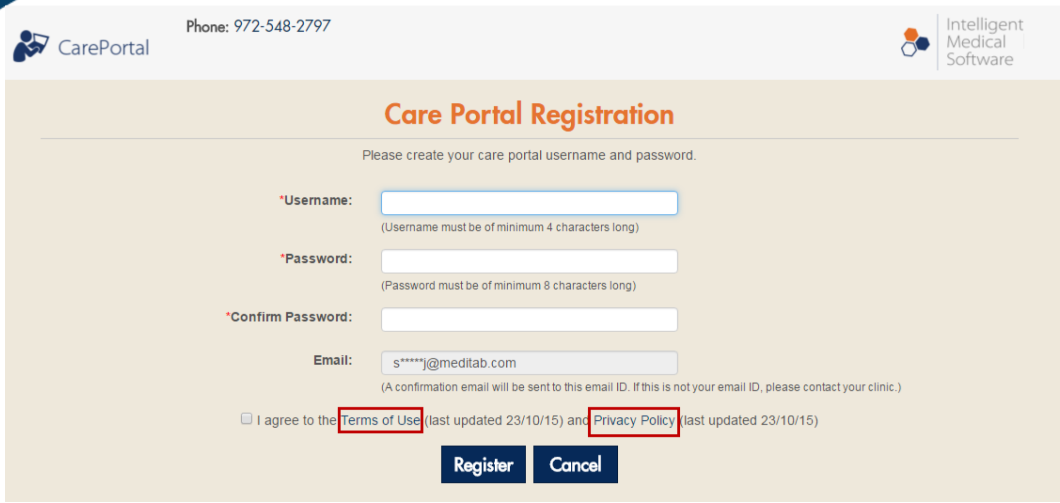


Figure 1 On the **Care Portal Registration** page, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.

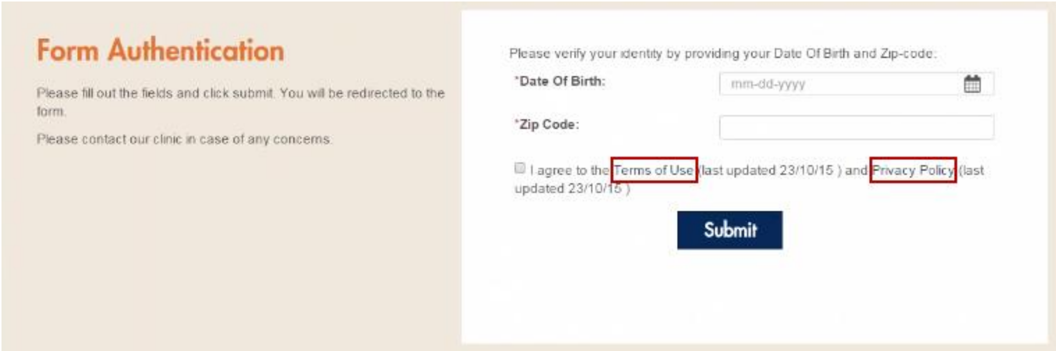


Figure 2 On the **Form Authentication** page, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.

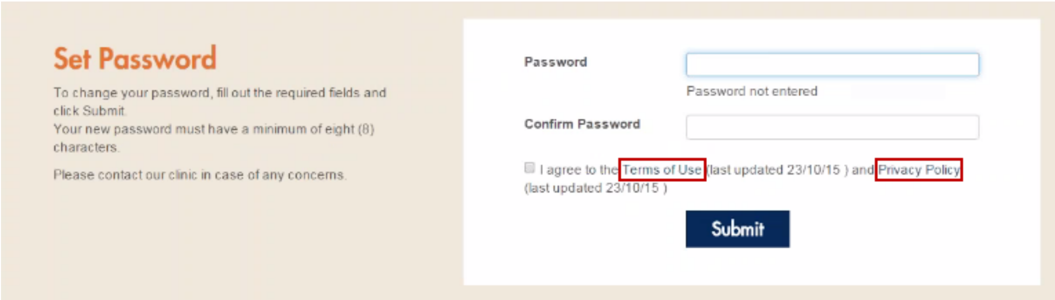


Figure 3 On the **Set Password** page, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.

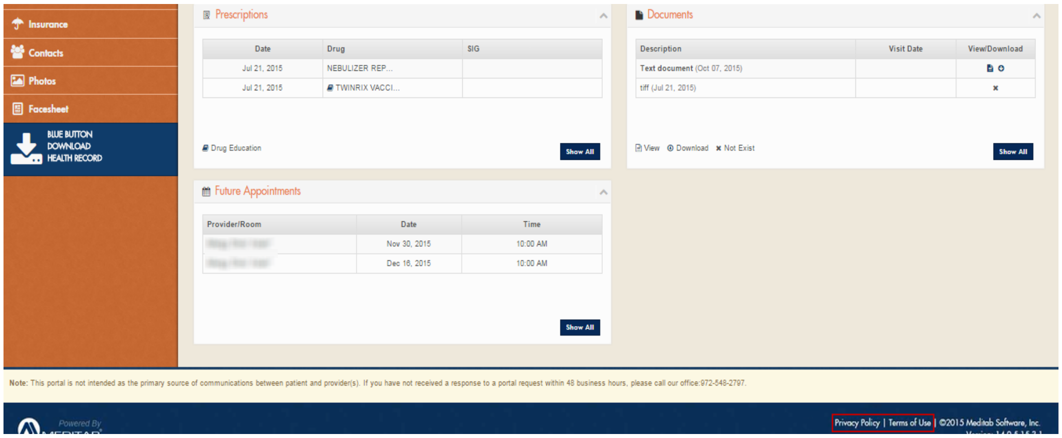
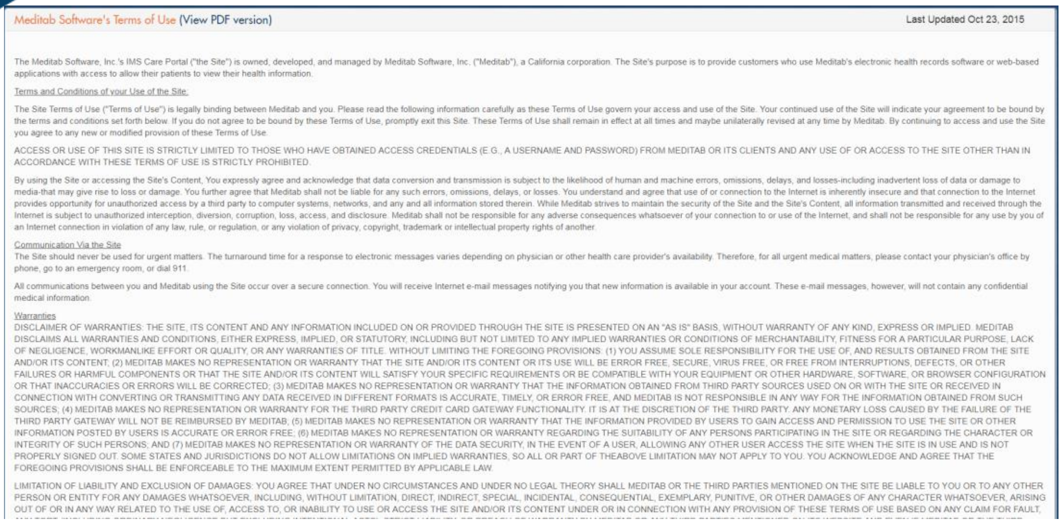


Figure 4 On the lower portion of any page or pane in your IMS CarePortal account, click **Terms of Use** to open the EULA page, or click **Privacy Policy** to open the privacy policy page.



Meditab Software's Terms of Use (View PDF version) Last Updated Oct 23, 2015

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The Site 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 and conditions set forth below. If you do not agree to be bound by these Terms of Use, promptly exit this Site. These Terms of Use shall remain in effect at all times and maybe unilaterally revised at any time by Meditab. By continuing to access and use the Site you agree to any new or modified provision of these Terms of Use.

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The Site should 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 physician's office by phone, go to an emergency room, or dial 911.

All communications between you and Meditab using the Site occur over a secure connection. You will receive Internet e-mail messages notifying you that new information is available in your account. These e-mail messages, however, will not contain any confidential medical information.

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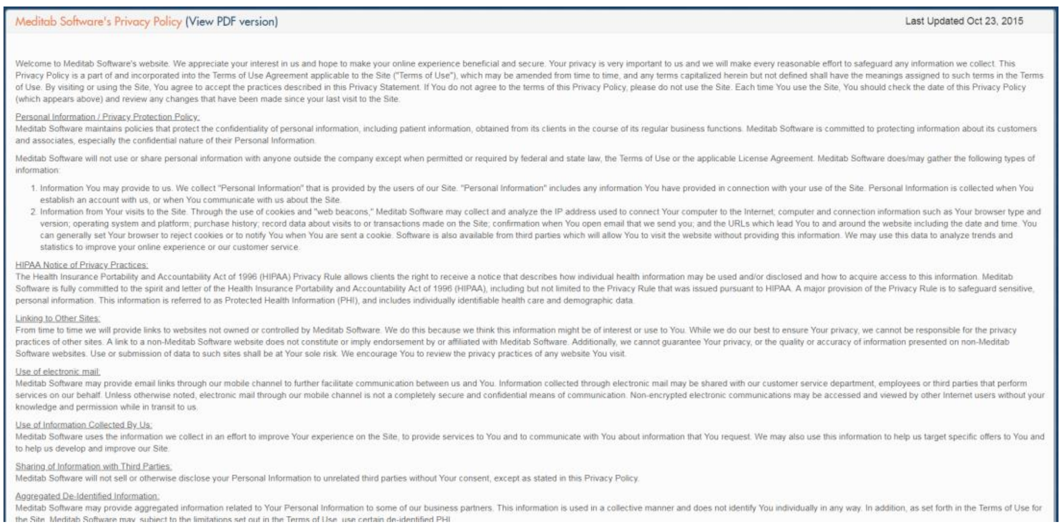
Figure 5 The EULA page

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



Meditab Software's Privacy Policy (View PDF version) Last Updated Oct 23, 2015

Welcome to Meditab Software's website. We appreciate your interest in us and hope to make your online experience beneficial and secure. Your privacy is very important to us and we will make every reasonable effort to safeguard any information we collect. This Privacy Policy is a part of and incorporated into the Terms of Use Agreement applicable to the Site ("Terms of Use"), which may be amended from time to time, and any terms capitalized herein but not defined shall have the meanings assigned to such terms in the Terms of Use. By visiting or using the Site, You agree to accept the practices described in this Privacy Statement. If You do not agree to the terms of this Privacy Policy, please do not use the Site. Each time You use the Site, You should check the date of this Privacy Policy (which appears above) and review any changes that have been made since your last visit to the Site.

Personal Information / Privacy Protection Policy:
Meditab Software maintains policies that protect the confidentiality of personal information, including patient information, obtained from its clients in the course of its regular business functions. Meditab Software is committed to protecting information about its customers and associates, especially the confidential nature of their Personal Information.

Meditab Software will not use or share personal information with anyone outside the company except when permitted or required by federal and state law, the Terms of Use or the applicable License Agreement. Meditab Software does/may gather the following types of information:

1. Information You may provide to us. We collect "Personal Information" that is provided by the users of our Site. "Personal Information" includes any information You have provided in connection with your use of the Site. Personal Information is collected when You establish an account with us, or when You communicate with us about the Site.
2. Information from Your visits to the Site. Through the use of cookies and "web beacons," Meditab Software may collect and analyze the IP address used to connect Your computer to the Internet; computer and connection information such as Your browser type and version; operating system and platform; purchase history; record data about visits to or transactions made on the Site; confirmation when You open email that we send you; and the URLs which lead You to and around the website including the date and time. You can generally set Your browser to reject cookies or to notify You when You are sent a cookie. Software is also available from third parties which will allow You to visit the website without providing this information. We may use this data to analyze trends and statistics to improve your online experience or our customer service.

HIPAA Notice of Privacy Practices:
The Health Insurance Portability and Accountability Act of 1996 (HIPAA) Privacy Rule allows clients the right to receive a notice that describes how individual health information may be used and/or disclosed and how to acquire access to this information. Meditab Software is fully committed to the spirit and letter of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), including but not limited to the Privacy Rule that was issued pursuant to HIPAA. A major provision of the Privacy Rule is to safeguard sensitive, personal information. This information is referred to as Protected Health Information (PHI), and includes individually identifiable health care and demographic data.

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From time to time we will provide links to websites not owned or controlled by Meditab Software. We do this because we think this information might be of interest or use to You. While we do our best to ensure Your privacy, we cannot be responsible for the privacy practices of other sites. A link to a non-Meditab Software website does not constitute or imply endorsement by or affiliated with Meditab Software. Additionally, we cannot guarantee Your privacy, or the quality or accuracy of information presented on non-Meditab Software websites. Use or submission of data to such sites shall be at Your sole risk. We encourage You to review the privacy practices of any website You visit.

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Meditab Software may provide email links through our mobile channel to further facilitate communication between us and You. Information collected through electronic mail may be shared with our customer service department, employees or third parties that perform services on our behalf. Unless otherwise noted, electronic mail through our mobile channel is not a completely secure and confidential means of communication. Non-encrypted electronic communications may be accessed and viewed by other Internet users without your knowledge and permission while in transit to us.

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Sharing of Information with Third Parties:
Meditab Software will not sell or otherwise disclose your Personal Information to unrelated third parties without Your consent, except as stated in this Privacy Policy.

Aggregated De-Identified Information:
Meditab Software may provide aggregated information related to Your Personal Information to some of our business partners. This information is used in a collective manner and does not identify You individually in any way. In addition, as set forth in the Terms of Use for the Site, Meditab Software may, subject to the limitations set out in the Terms of Use, use certain de-identified PHI

Figure 6 The privacy policy page

Note:

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**.

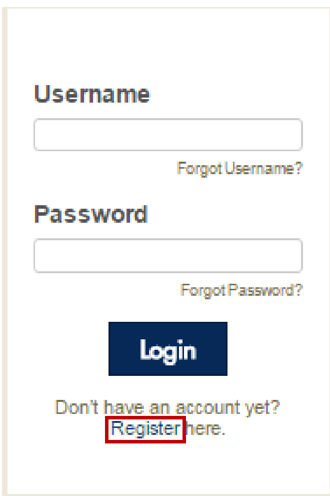


Figure 7 On the IMS CarePortal sign-in page, click **Register** to register to the portal.

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

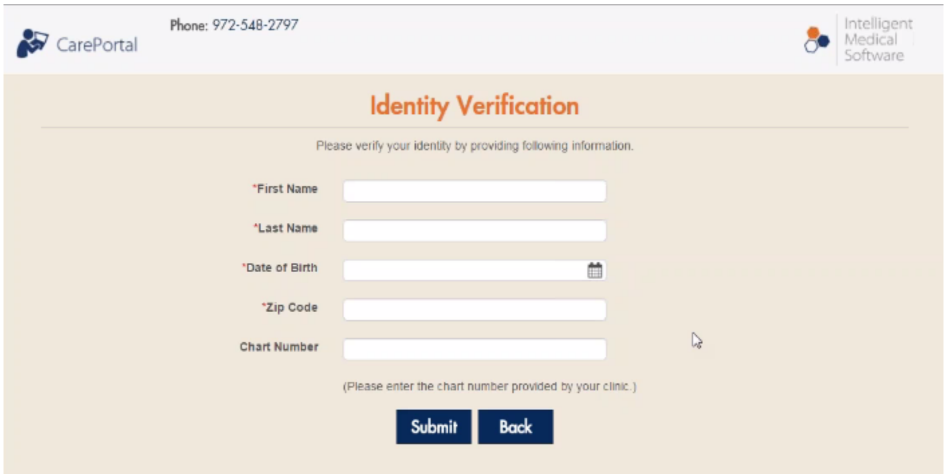


Figure 8 On the **Identity Verification** page, enter the applicable information to verify your identity.

3. Click **Submit**.

4. 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**.

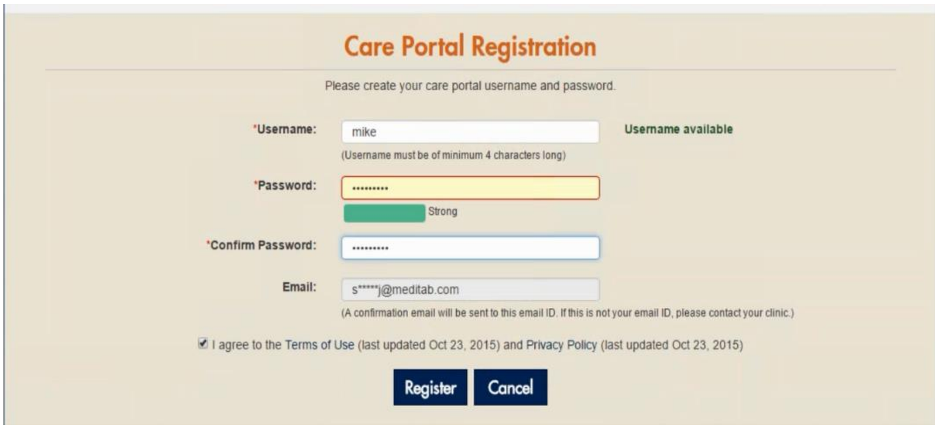


Figure 9 On the **Care Portal Registration** page, enter the applicable information, and then click **Register** to register to the portal.

Note:

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.

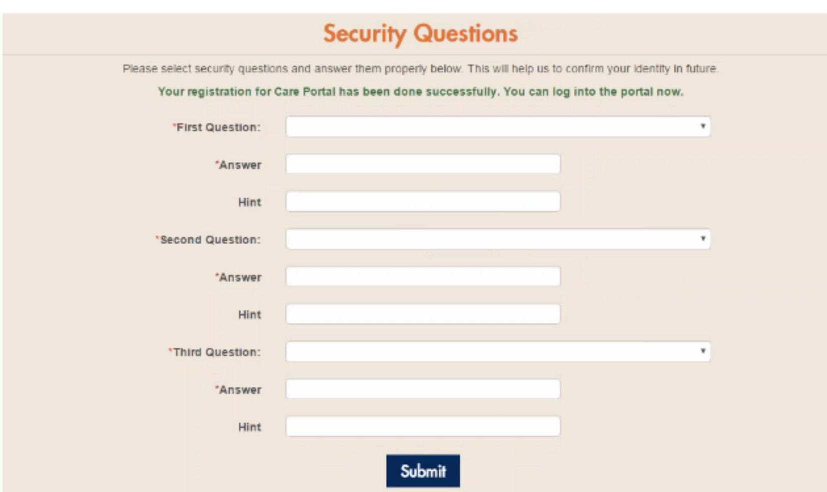


Figure 10 Enter the applicable information on the **Security Questions** page to set up your security questions.

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.

Hello ,

Welcome to IMS Care Portal. Below is the username of your account.

Portal Username: [redacted]

Please click on the link below or copy and paste into your browser address to verify your account. You will be prompted to verify your identity and then will be asked to change your password to one you can remember. It must be minimum 8 characters either letters or numbers.

Email Verification Link: https://care.meditab.com/general/index.php?file=med_activate_account&key=N19tYW51ZWxjNTU=&type=LA

Do Not reply to this email, as this is an unmonitored email address and to please contact us directly regarding any problems.

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

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

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**.

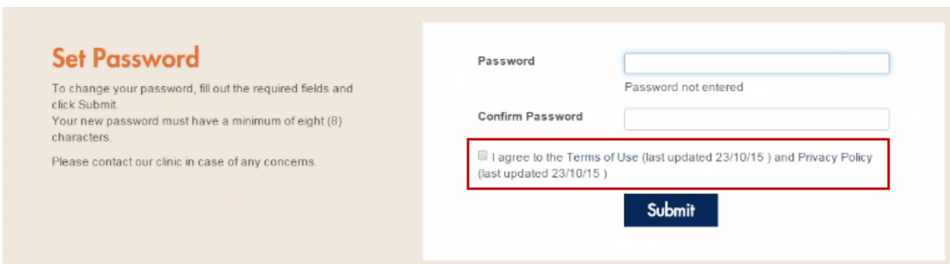


Figure 13 On the **Set Password** page, enter the applicable information, select the agreement check box, and then click **Submit** to proceed to the **Security Questions** page.

5. 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.

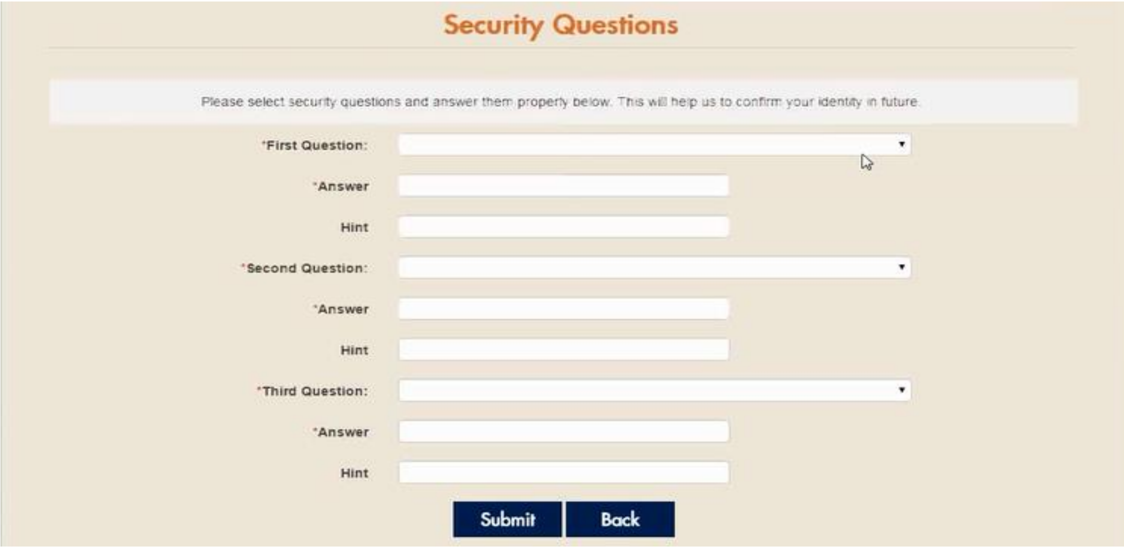


Figure 14 Enter the applicable information on the **Security Questions** page to set up your security questions.

Note:

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**.

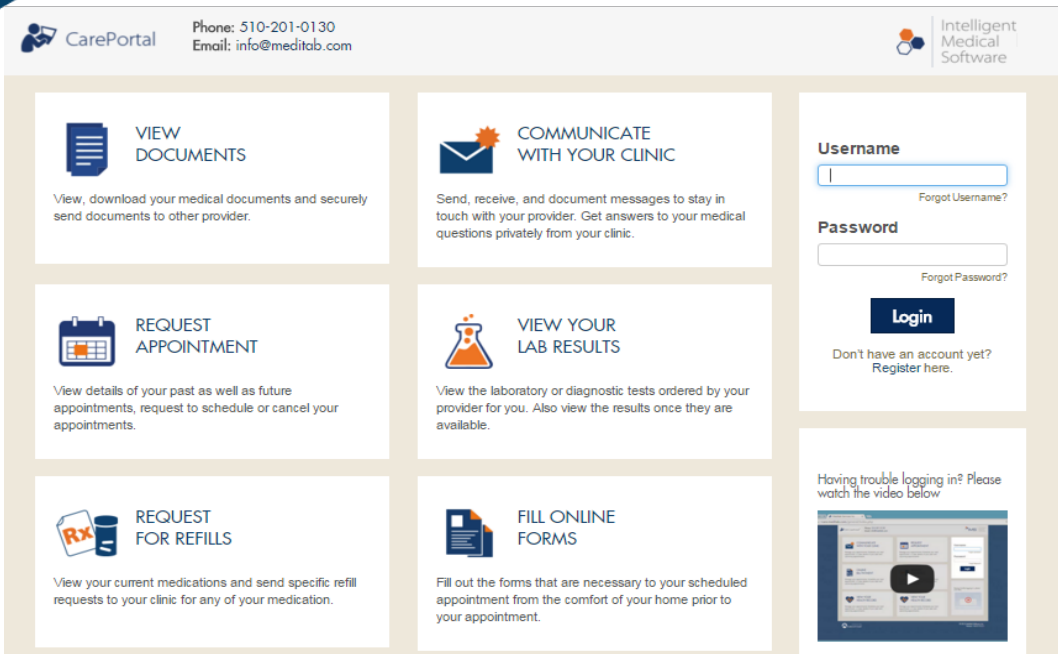


Figure 15 Enter your username and password on the IMS CarePortal sign-in page, and then click **Login** to sign in to your account.

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.

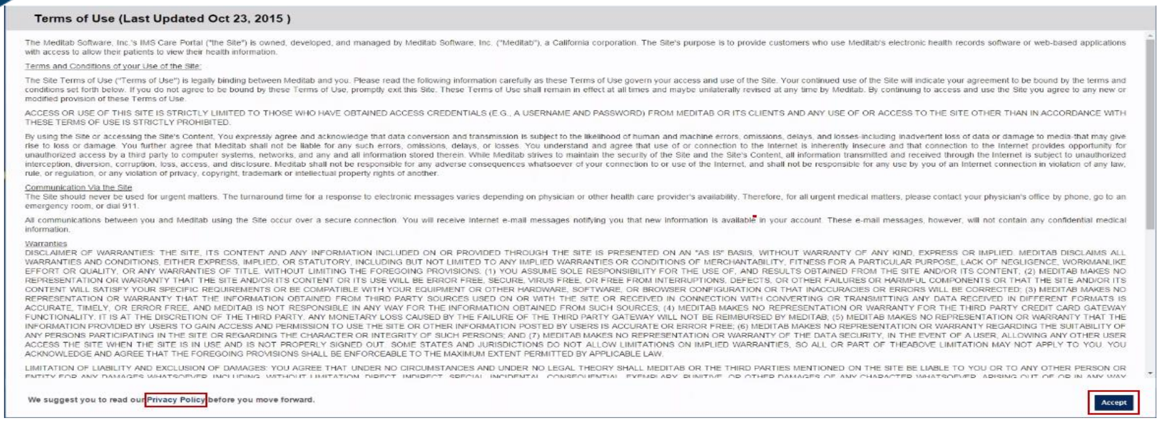


Figure 16 On the EULA page, review the content, and then click **Accept** to proceed to the IMS CarePortal home screen.

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?**.

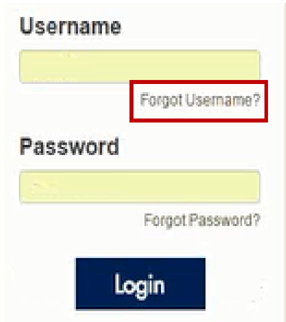


Figure 17 Click **Forgot Username?** on the IMS CarePortal sign-in page to retrieve your username.

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

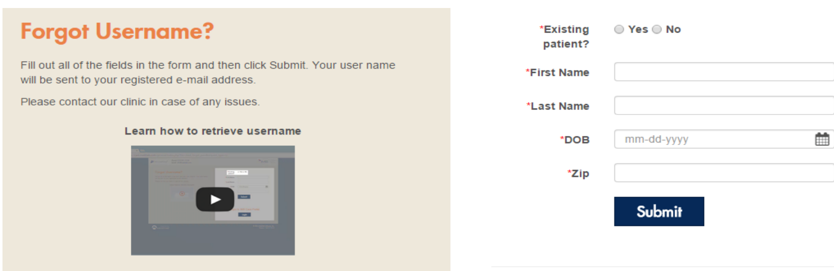


Figure 18 On the **Forgot Username?** page, enter the applicable information to confirm your identity, and then click **Submit.**

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?**.

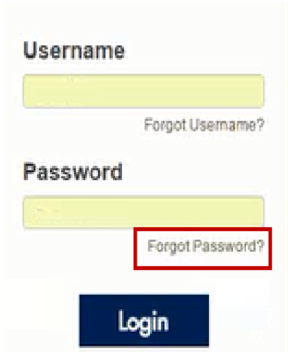


Figure 19 On the IMS CarePortal sign-in page, click **Forgot Password?** to retrieve your forgotten password.

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

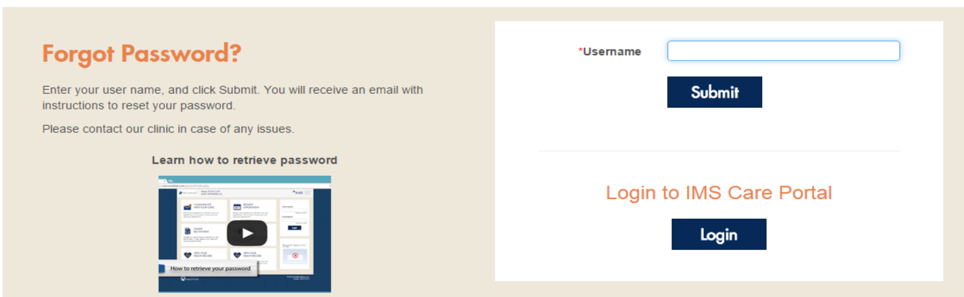


Figure 20 When the **Forgot Password?** page opens, enter your username in **Username**, and then click **Submit.**

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.

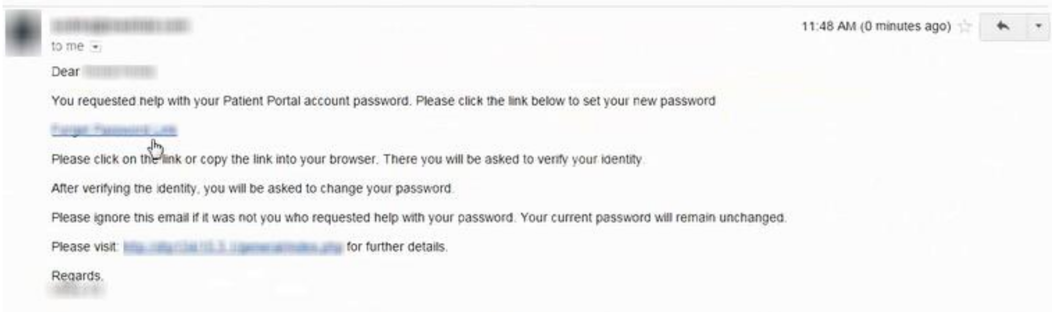


Figure 21 Click the link to open the **Account Verification** page.

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

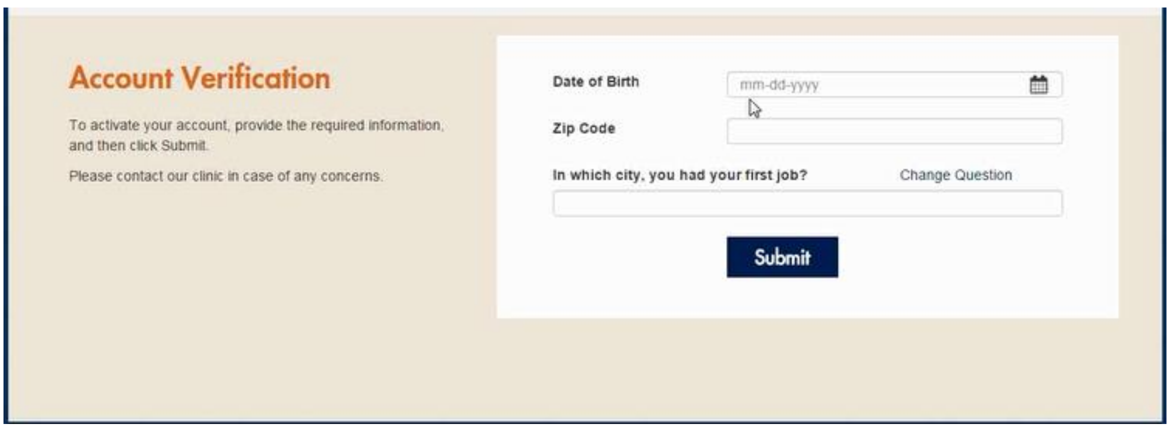


Figure 22 Enter the applicable information on the **Account Verification** page to open the **Set Password** page.

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**.

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.

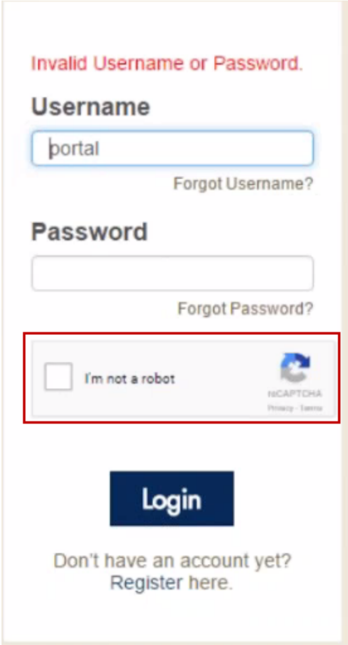


Figure 24 The CAPTCHA feature on the IMS CarePortal sign-in page

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**.

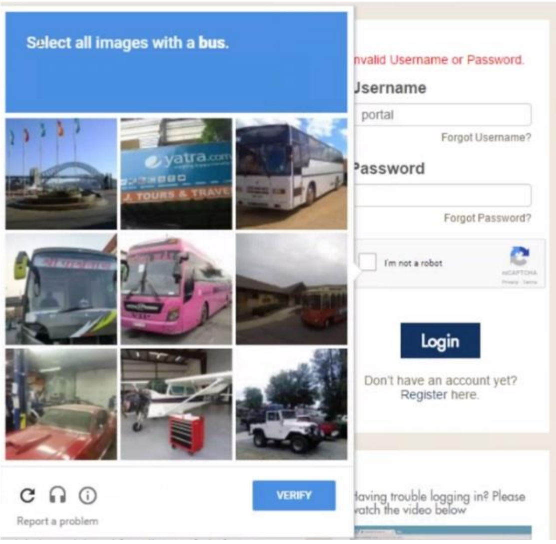


Figure 25 The verification window of the CAPTCHA feature

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.

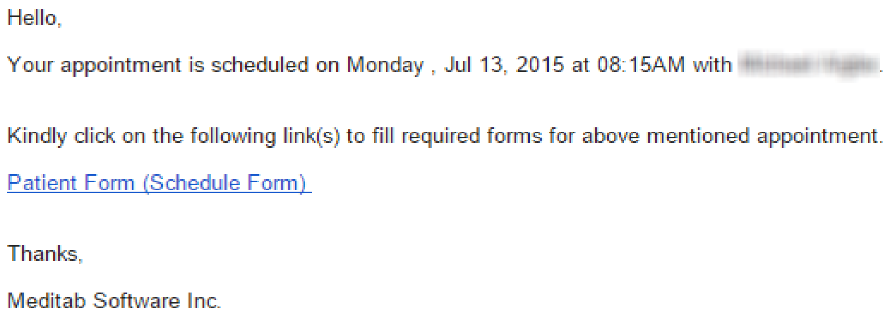


Figure 26 In the email that you receive from your provider, click the link to open the form.

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

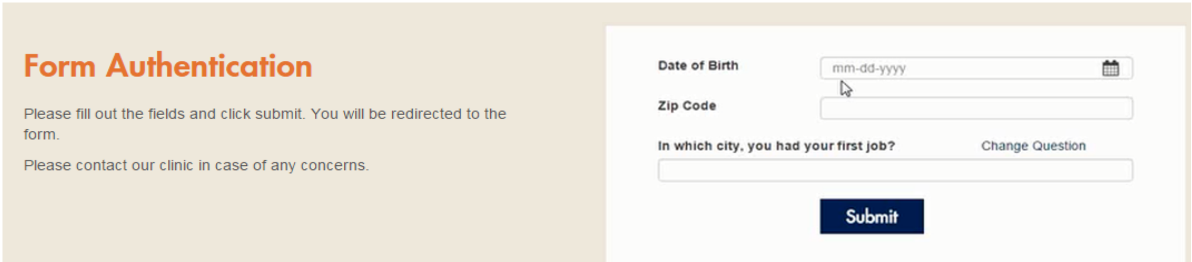


Figure 27 On the **Form Authentication** page, enter your date of birth and zip code, answer the security question, and then click **Submit** to open the form that your provider sent.

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

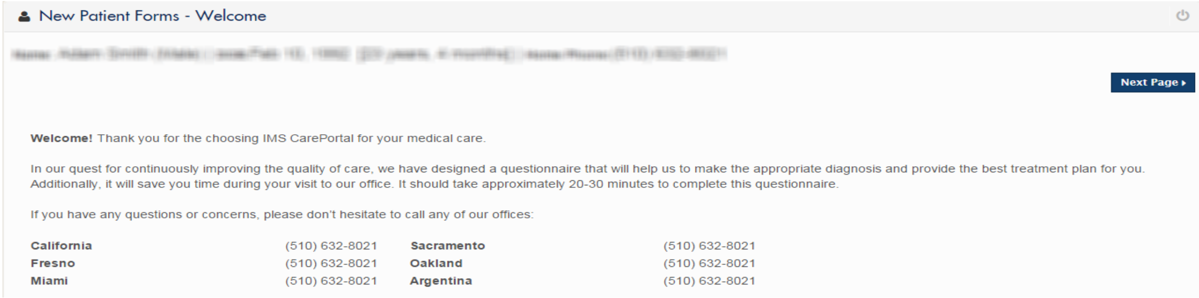


Figure 28 In the form pages, fill in the applicable information, and then click **Next Page** to fill out the entire form.

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 to go directly to the first page or the **Last Page** symbol to go directly to the last page.

Note:

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.

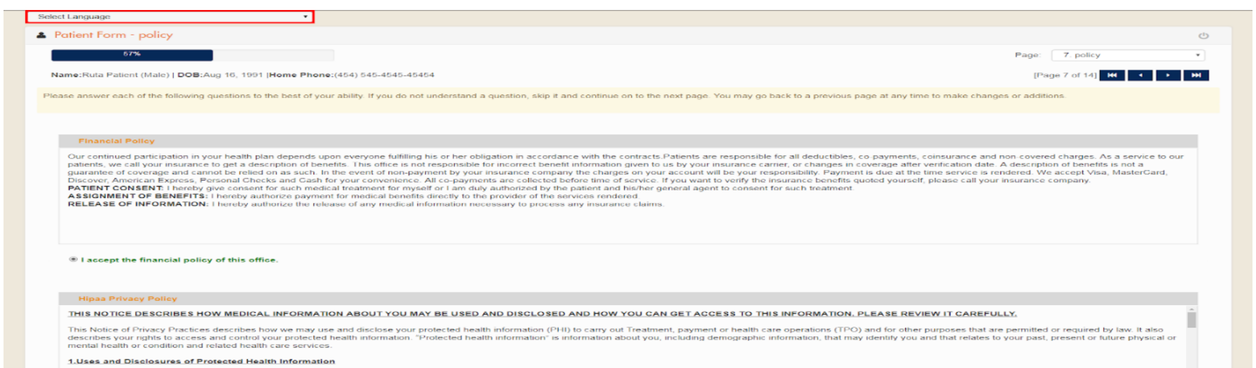


Figure 29 The **Select Language** list

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**.

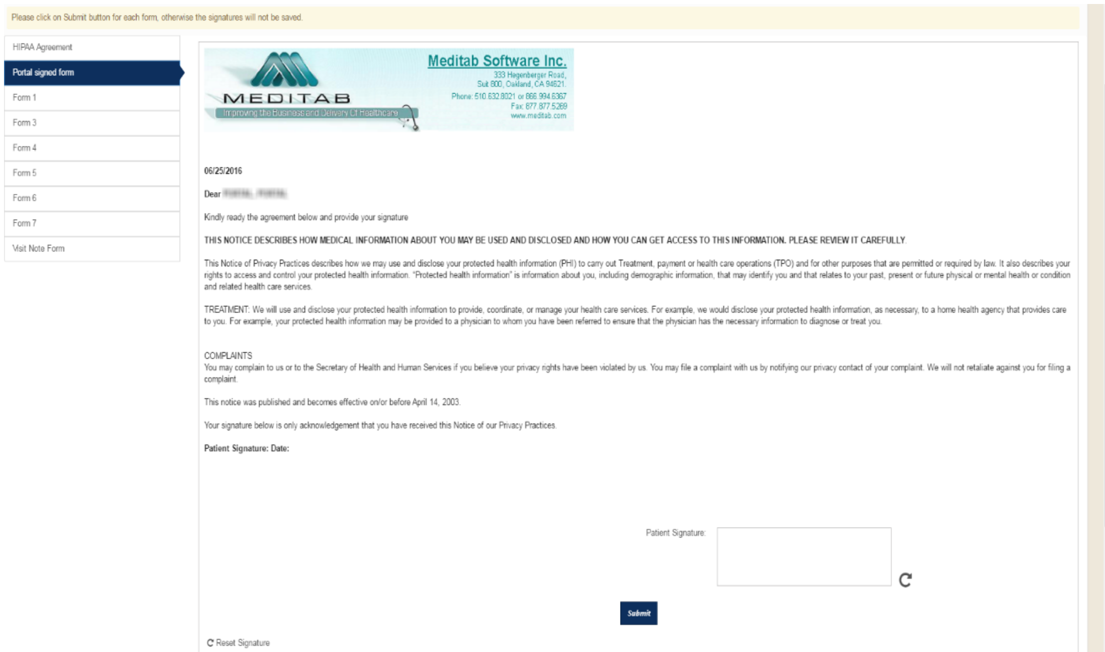


Figure 30 The **Forms to be Signed** page

Note:

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 ↻ 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 🔍 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 to clear the entries of a field.

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

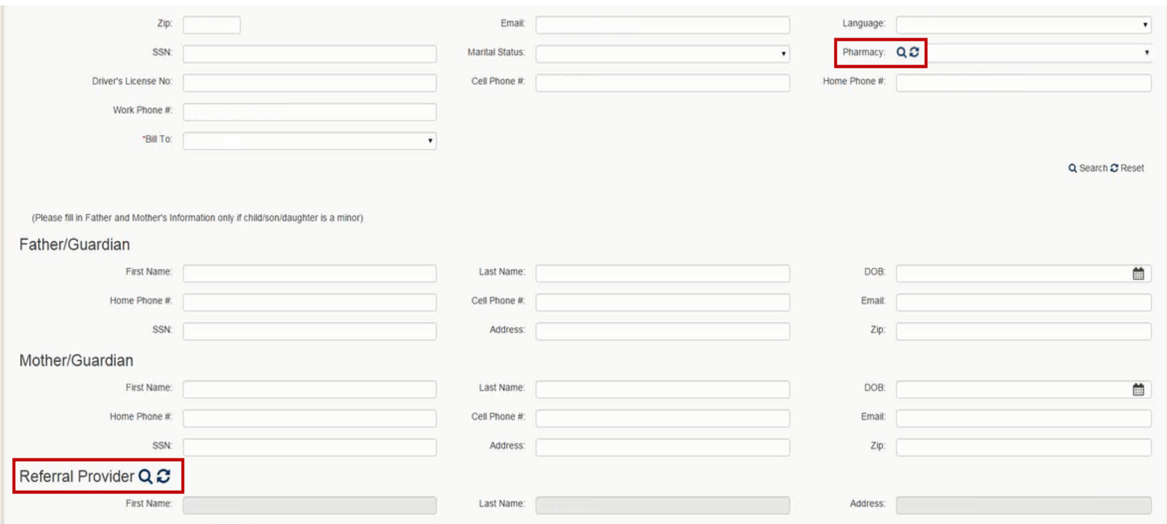


Figure 31 The **Search** and **Reset** symbols

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.

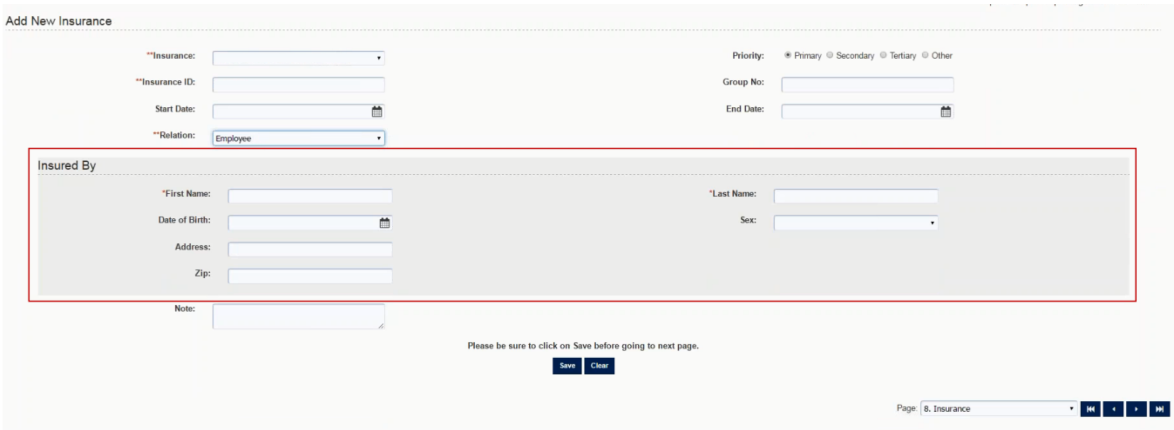


Figure 32 The **Insured By** section on the **Insurance** page of the form

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.

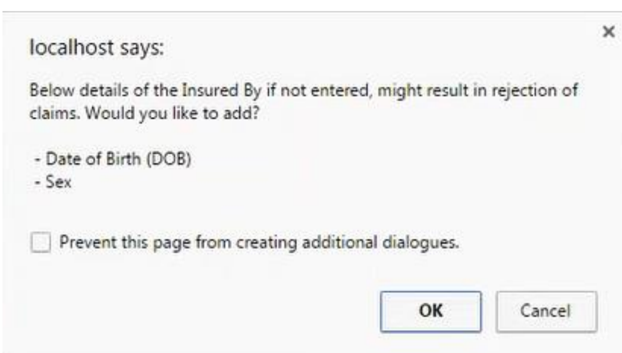


Figure 33 The message that appears after you save the insurance request.

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

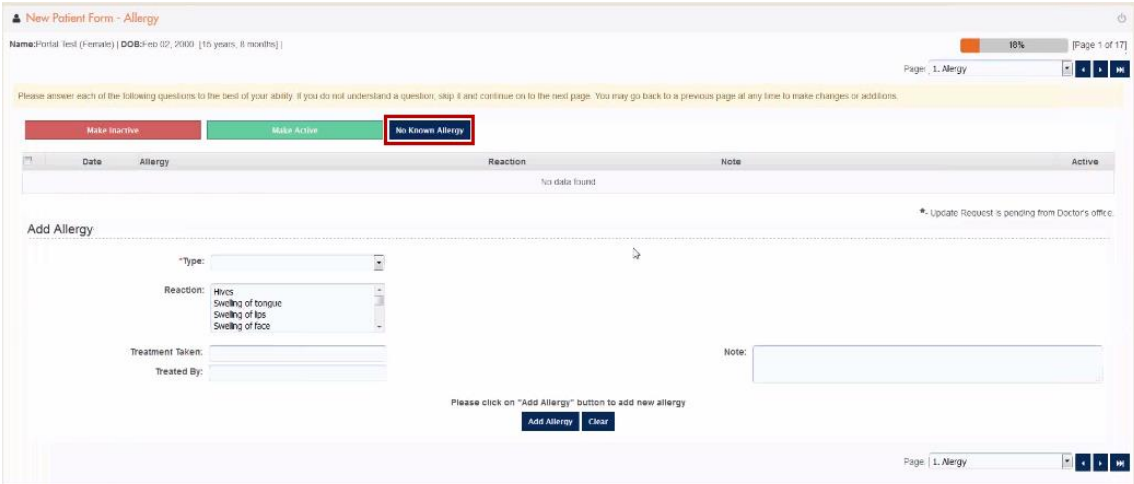


Figure 34 The **Allergy** page of the form

Note:

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.

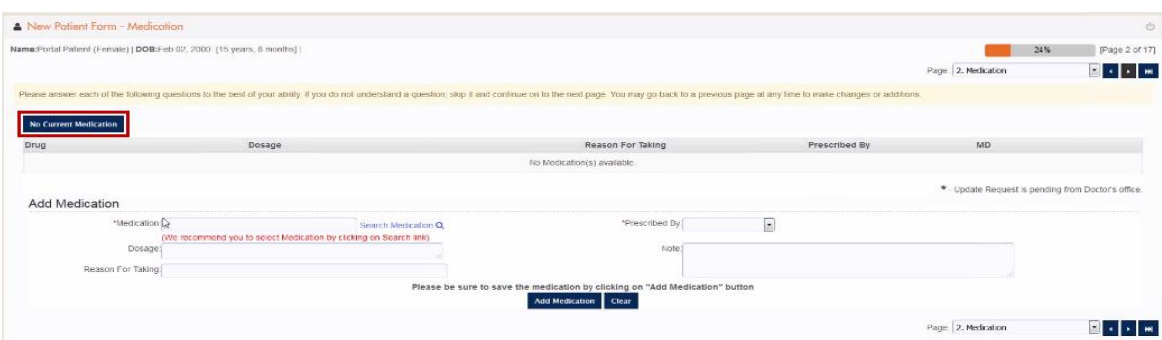


Figure 35 The **Medication** page of the form

Note:

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**.

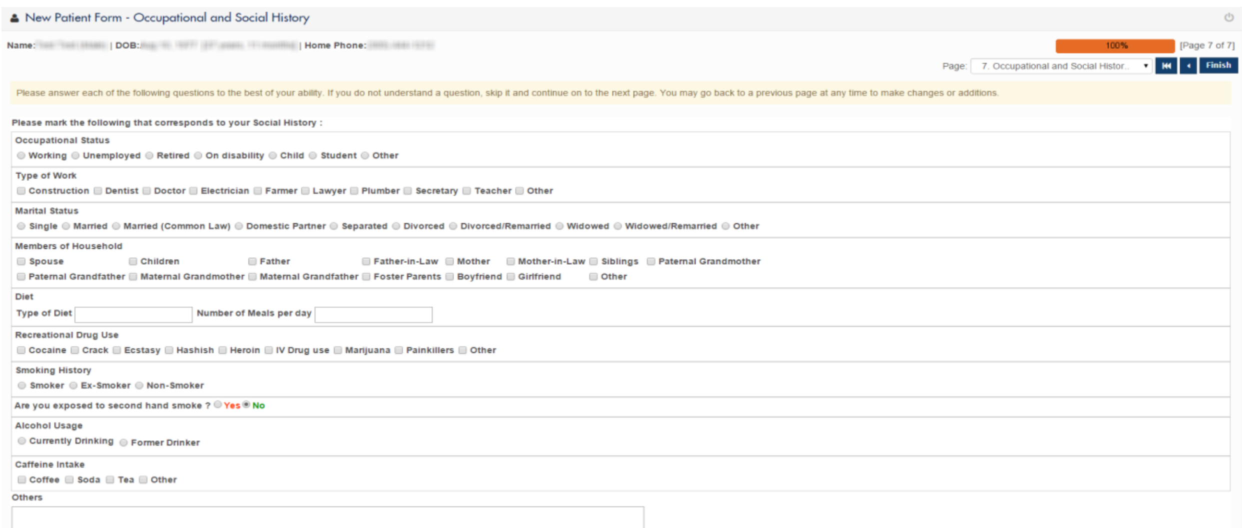


Figure 36 On the last page of the form, click **Finish** to fill out the form.

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.

Note:

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**.

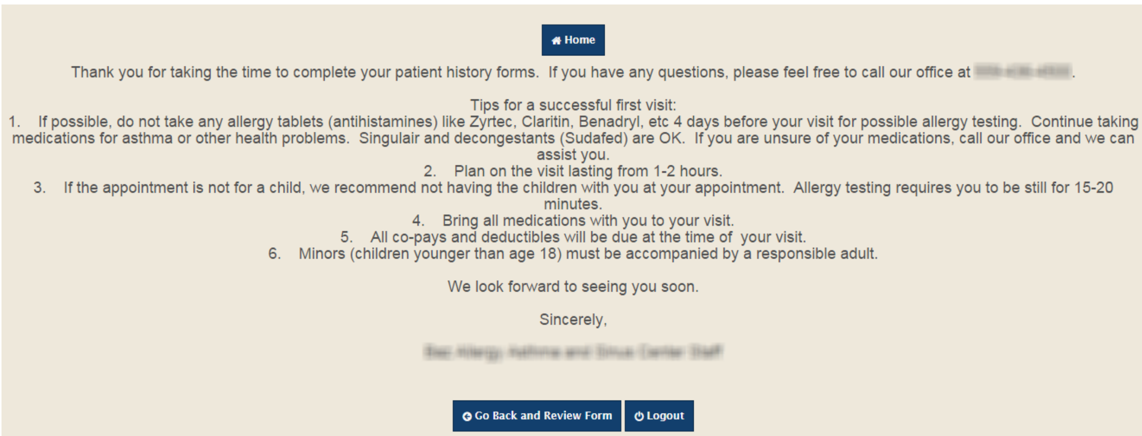


Figure 37 On the thank-you page, click **Logout** to close the form.

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.

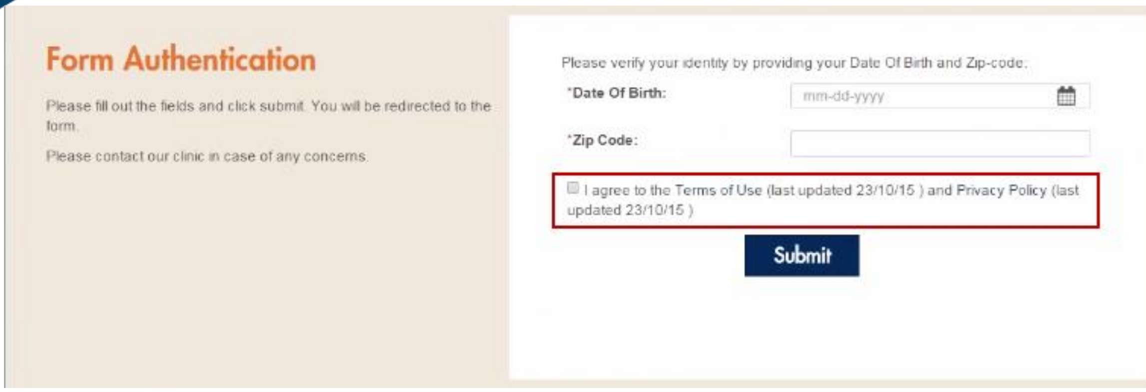


Figure 38 The **Form Authentication** page with the agreement check box

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.

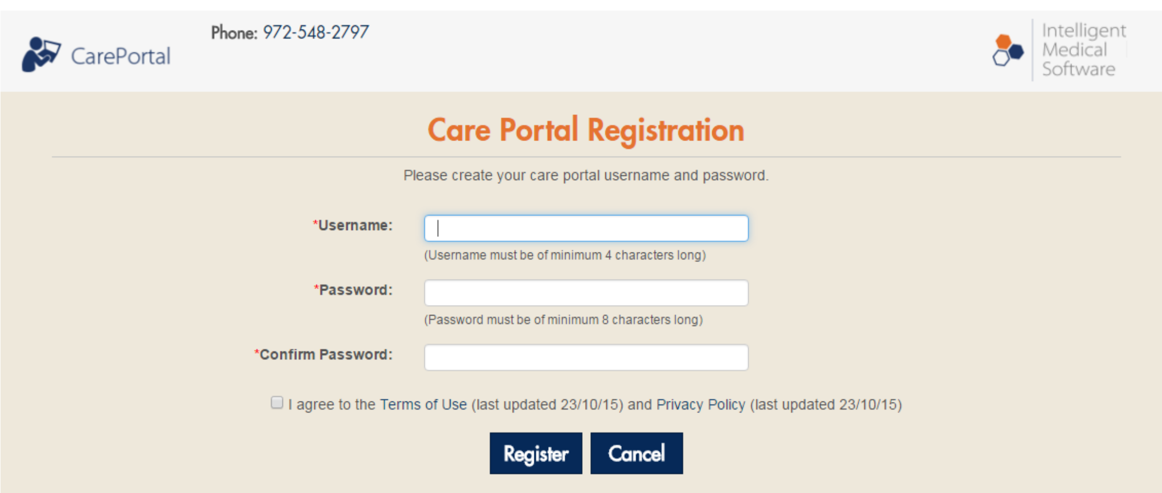


Figure 39 The **Care Portal Registration** page

Note:

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.

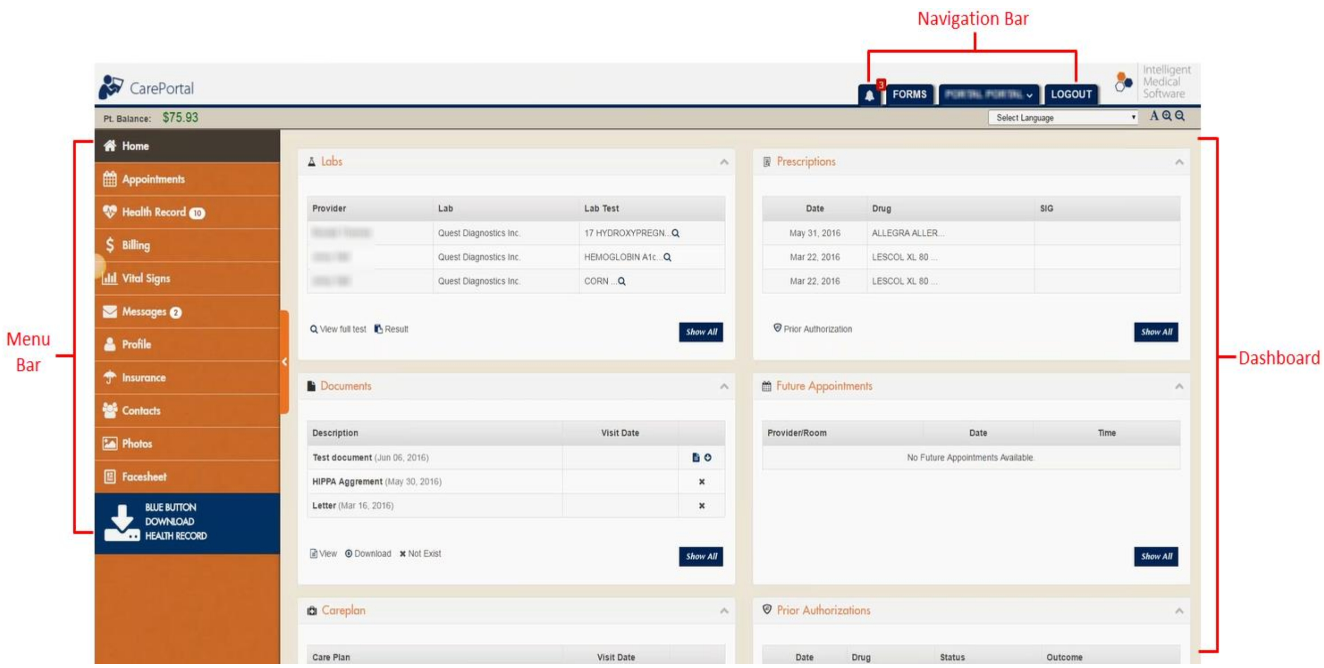


Figure 40 The IMS CarePortal home page

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.

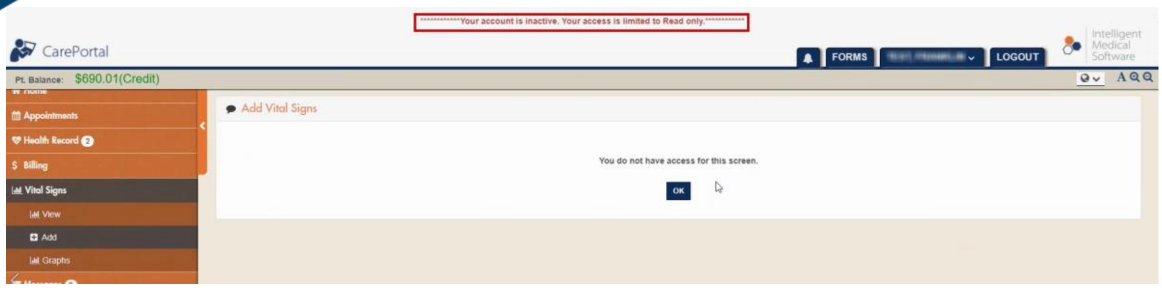


Figure 41 The message that appears in the uppermost section of the IMS CarePortal home page when an inactive user signs in to his or her account.

Navigation Bar

On the navigation bar, you can find the following:

- **Notifications**. Click the **Notifications** symbol 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.

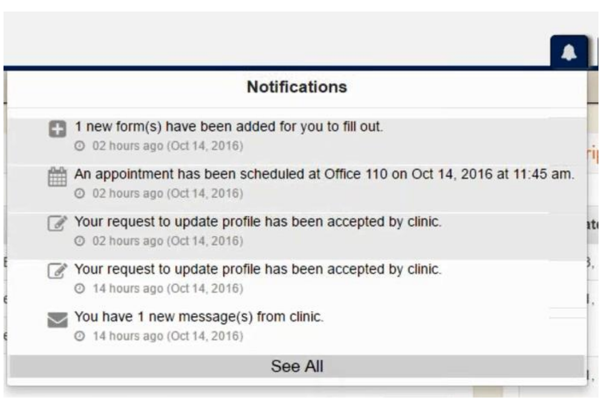


Figure 42 The **Notifications** list

Note:

The system highlights the unread notifications in the **Notifications** list.

To open the **Notifications** pane, click **See All**.

- **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 *[IMS CarePortal Forms](#)*.

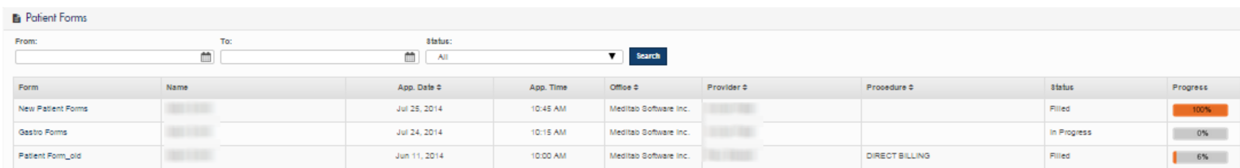


Figure 43 On the **Patient Forms** page, click a form title in the **Forms** column to open it.

- **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.

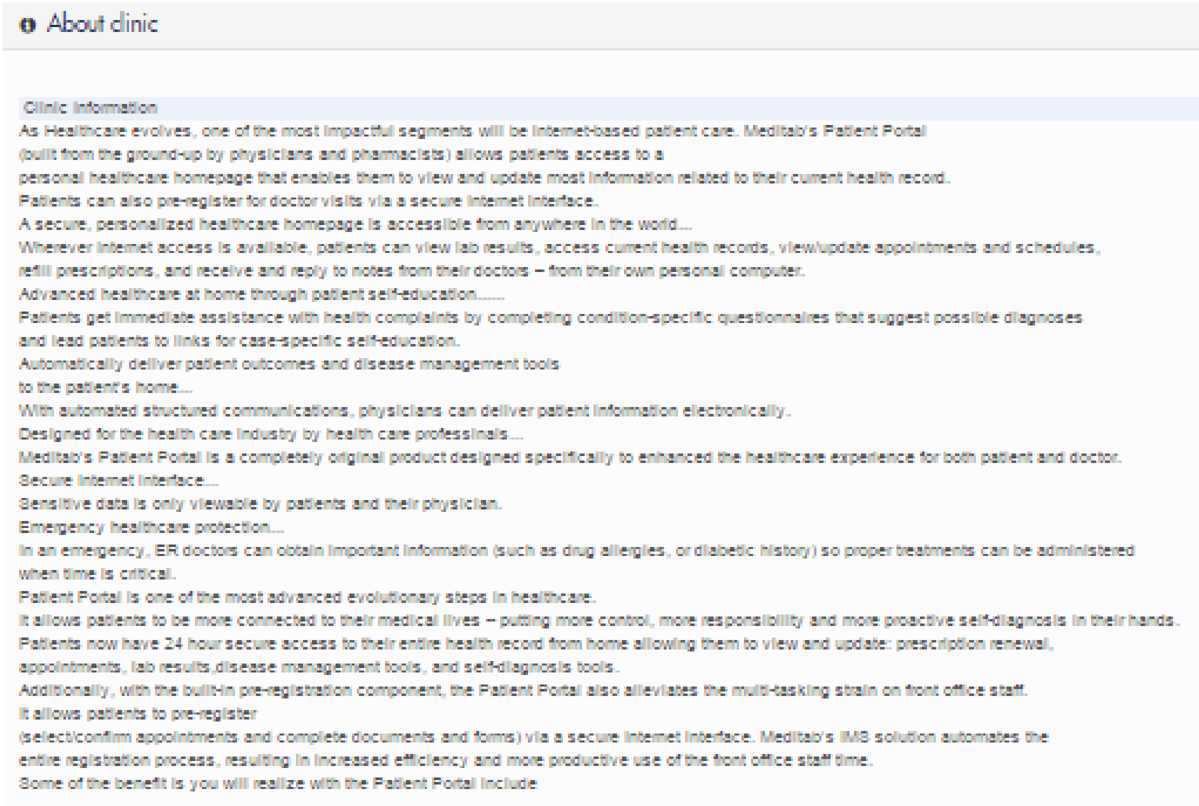


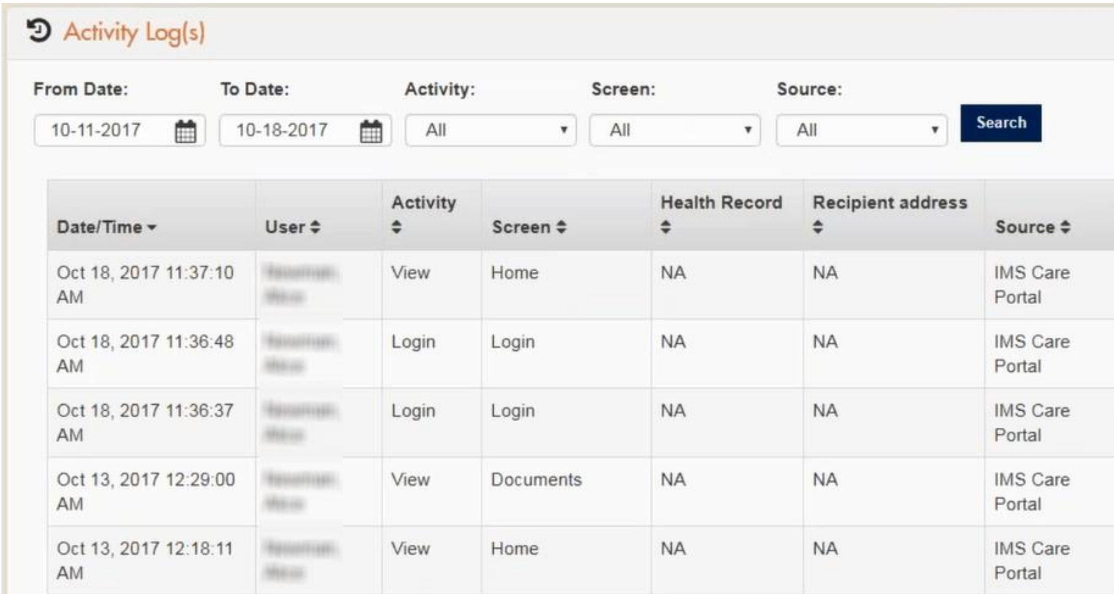
Figure 44 The **About Us** page

- **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 *Notifications*.

- **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.



Activity Log(s)

From Date: 10-11-2017 To Date: 10-18-2017 Activity: All Screen: All Source: All Search

Date/Time	User	Activity	Screen	Health Record	Recipient address	Source
Oct 18, 2017 11:37:10 AM	[illegible]	View	Home	NA	NA	IMS Care Portal
Oct 18, 2017 11:36:48 AM	[illegible]	Login	Login	NA	NA	IMS Care Portal
Oct 18, 2017 11:36:37 AM	[illegible]	Login	Login	NA	NA	IMS Care Portal
Oct 13, 2017 12:29:00 AM	[illegible]	View	Documents	NA	NA	IMS Care Portal
Oct 13, 2017 12:18:11 AM	[illegible]	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 to set the fonts in the portal to their default sizes.
- **Decrease font size**. Click the **Decrease font size** symbol 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.

Figure 46 You can use the options below the navigation bar to perform additional functions 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 *Patient Information*.

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:
    - **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	[illegible]	[illegible]	08 Apr 14	11:00 AM		
U	[illegible]	[illegible]	11 Jun 14	10:00 AM	Face Lift	
U	[illegible]	[illegible]	24 Jul 14	10:15 AM		
U	[illegible]	[illegible]	25 Jul 14	10:45 AM		
C	[illegible]	[illegible]	31 Jul 14	10:00 AM		

Figure 47 The healthcare information in ascending order

	Office	Provider/Room	Date	Time	Procedure	Note
U	[illegible]	[illegible]	30 Aug 14	10:45 AM		
M	[illegible]	[illegible]	30 Aug 14	11:30 AM		
U	[illegible]	[illegible]	29 Aug 14	10:45 AM		
C	[illegible]	[illegible]	31 Jul 14	10:00 AM		
U	[illegible]	[illegible]	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 of a module in the **List** column.

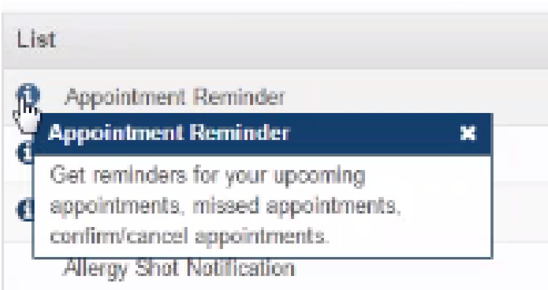


Figure 49 In the **List** column, point to the information symbol of a module to view the description of the module.

- 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**.

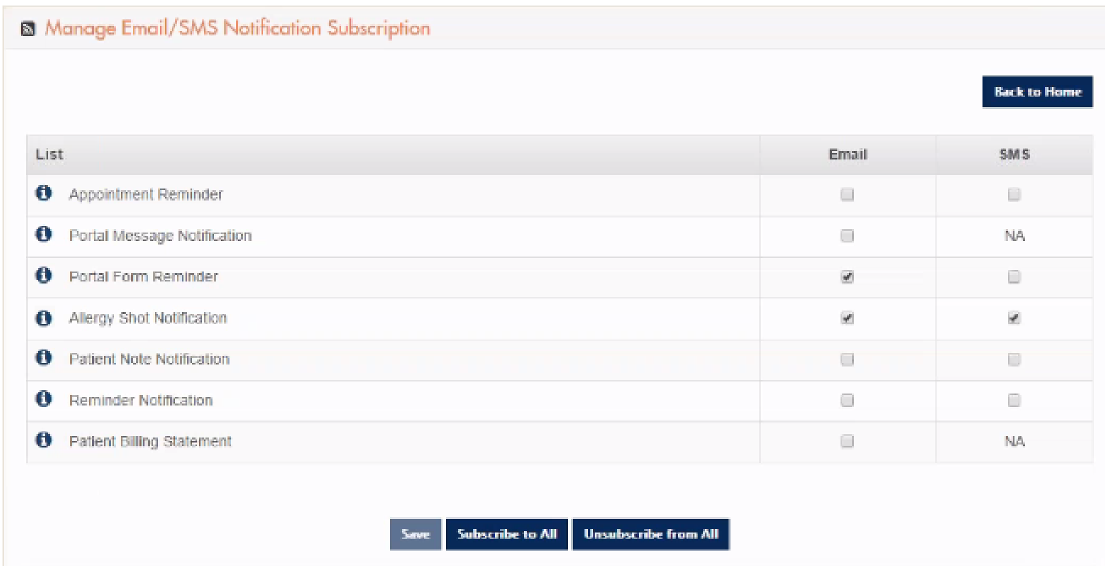


Figure 50 Manage your notification subscriptions in the **Manage Email/SMS Notification Subscription** pane.

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 .
2. From the **Notifications** list, click **See All**.

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

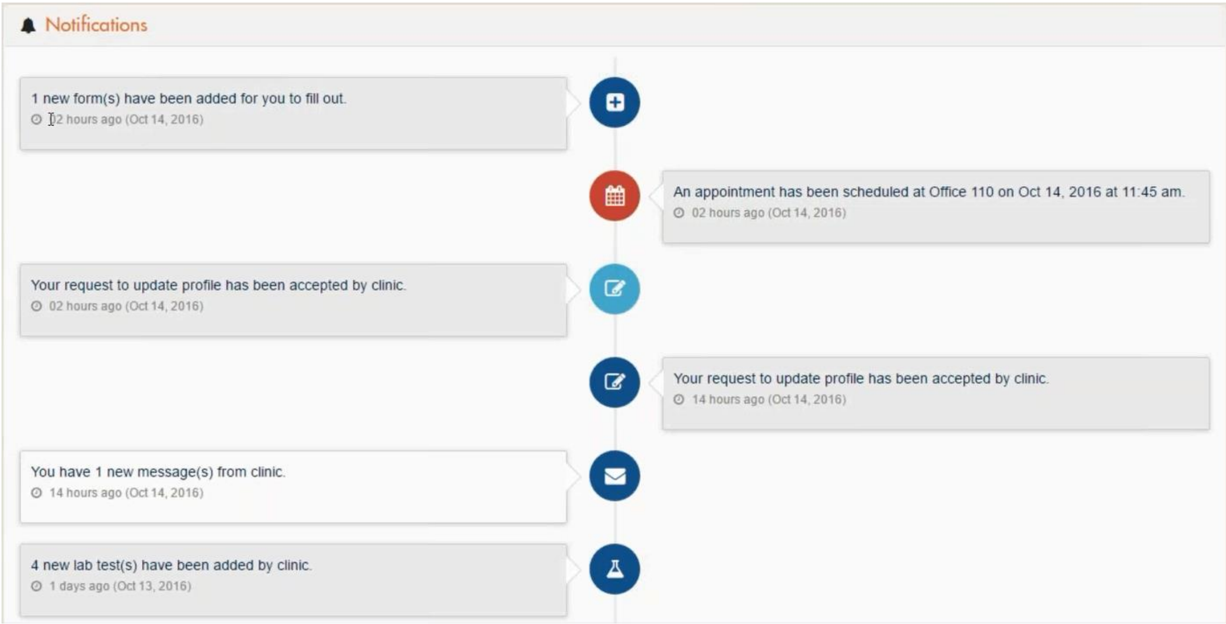


Figure 51 The **Notifications** pane

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

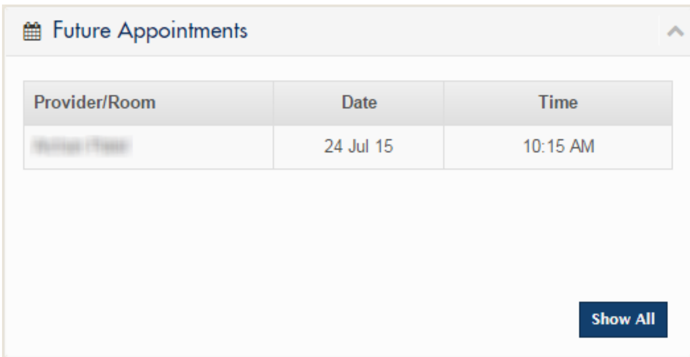
Patient Information

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.


Future Appointments

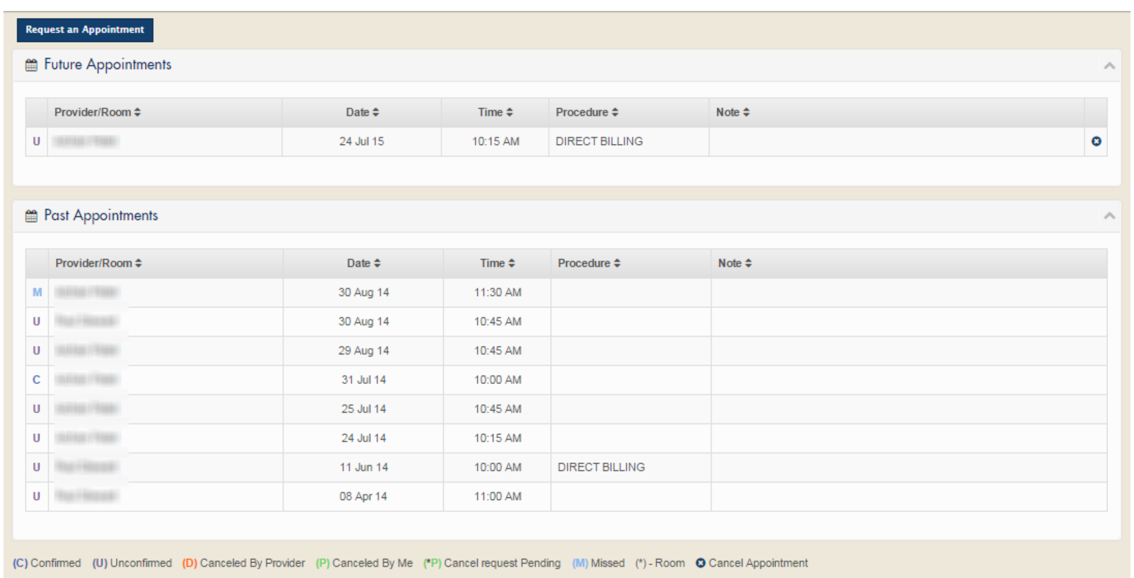
Provider/Room	Date	Time
	24 Jul 15	10:15 AM

Show All

Figure 52 The **Future Appointments** pane

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.


Request an Appointment

Future Appointments

	Provider/Room	Date	Time	Procedure	Note
U		24 Jul 15	10:15 AM	DIRECT BILLING	

Past Appointments

	Provider/Room	Date	Time	Procedure	Note
M		30 Aug 14	11:30 AM		
U		30 Aug 14	10:45 AM		
U		29 Aug 14	10:45 AM		
C		31 Jul 14	10:00 AM		
U		25 Jul 14	10:45 AM		
U		24 Jul 14	10:15 AM		
U		11 Jun 14	10:00 AM	DIRECT BILLING	
U		08 Apr 14	11:00 AM		

(C) Confirmed (U) Unconfirmed (D) Canceled By Provider (P) Canceled By Me (*P) Cancel request Pending (M) Missed (*) - Room Cancel Appointment

Figure 53 The **Future Appointments** and **Past Appointments** panes

Your appointments can have the following statuses:

- Confirmed (C)
- Unconfirmed (U)
- Cancelled By Provider (D)
- Cancelled By Me (P)
- Cancel request Pending (*P)
- Missed (M)

Note:

If you want to cancel a future appointment, click the cancel appointment symbol 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**.

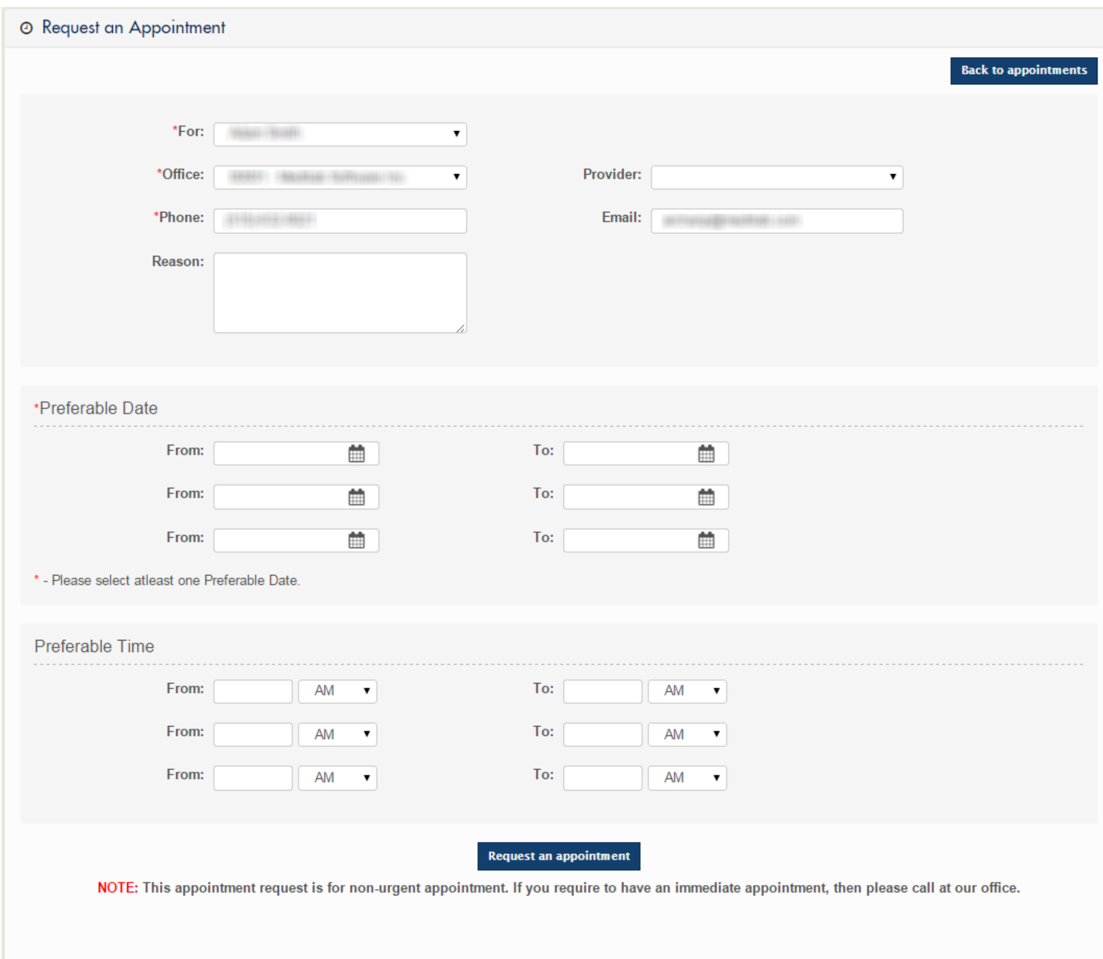


Figure 54 In **Request an Appointment**, enter the applicable appointment information, and then click **Request an Appointment** to request appointment.

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.

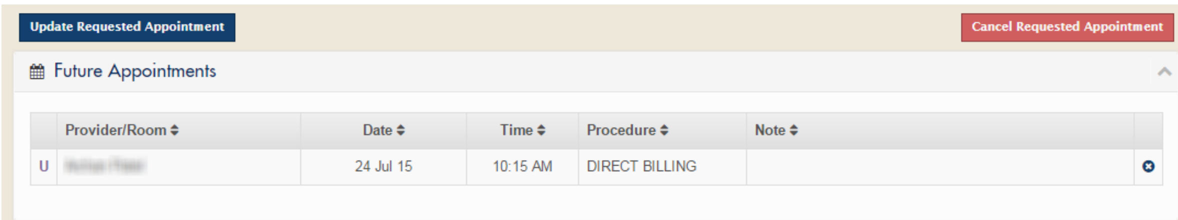


Figure 55 In **Request of the Appointments**, click either **Update Requested Appointment** or **Cancel Requested Appointment** to update or cancel an appointment request.

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.

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.

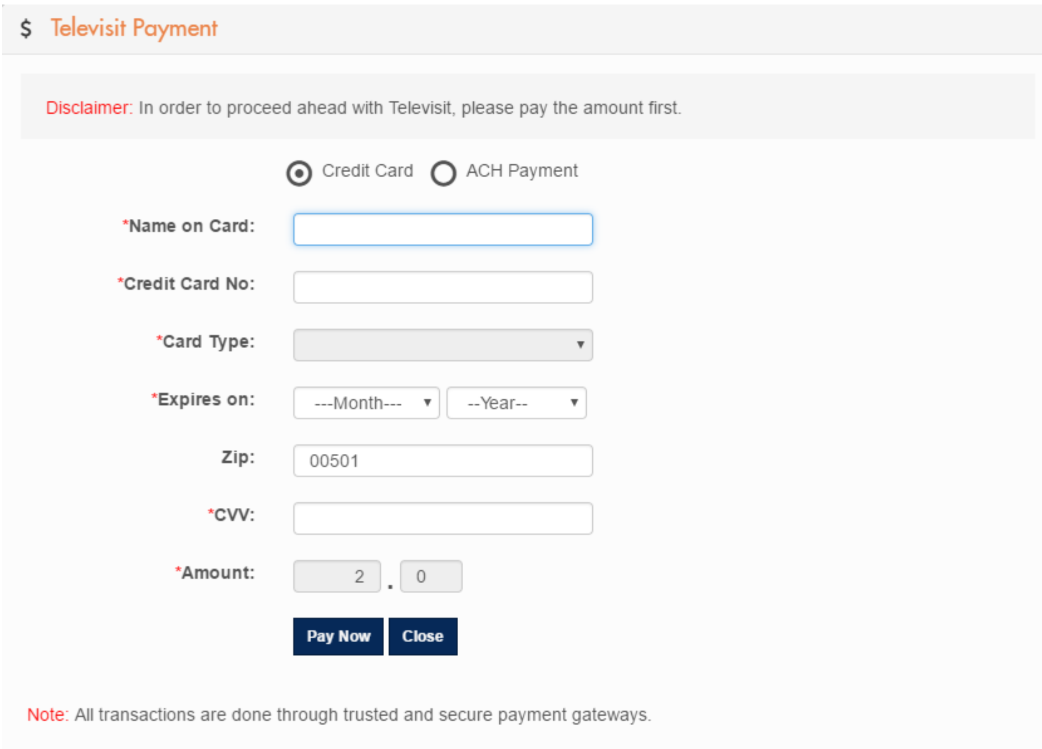


Figure 57 In **Televisit Payment**, enter the applicable payment information to pay for the televisit.

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 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***.

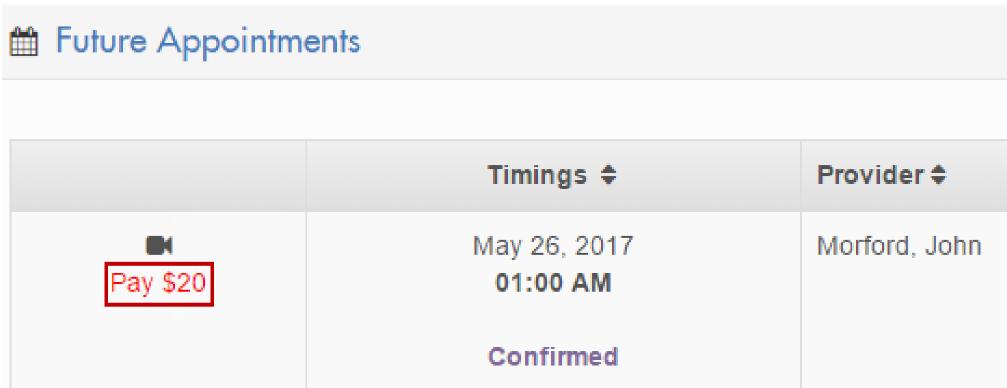


Figure 58 The **Future Appointments** section

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

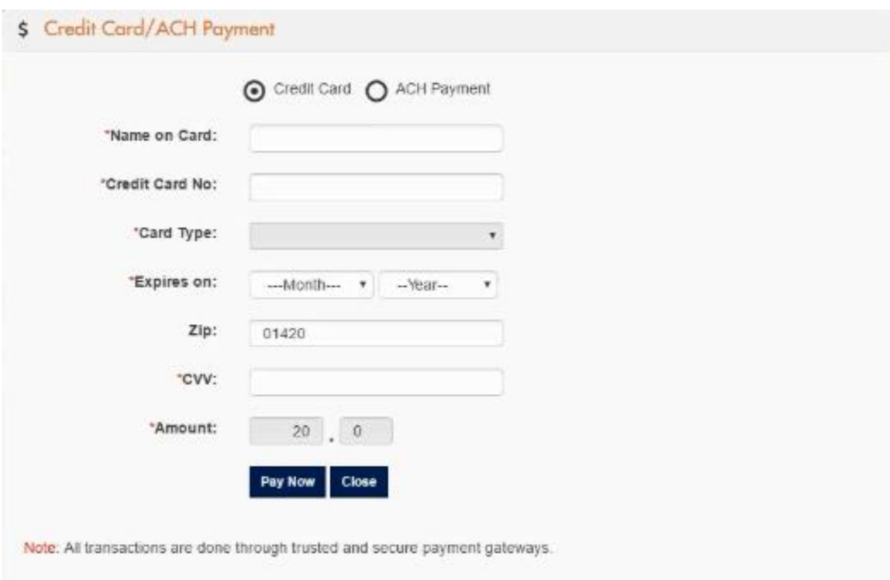


Figure 59 In **Credit Card/ACH Payment**, enter the applicable payment information to pay for the televisit.

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**.

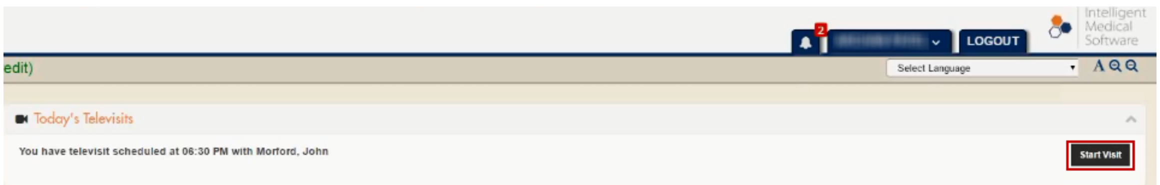


Figure 60 In **Today's Televisits**, click **Start Visit** to open the video platform for the televisit.

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

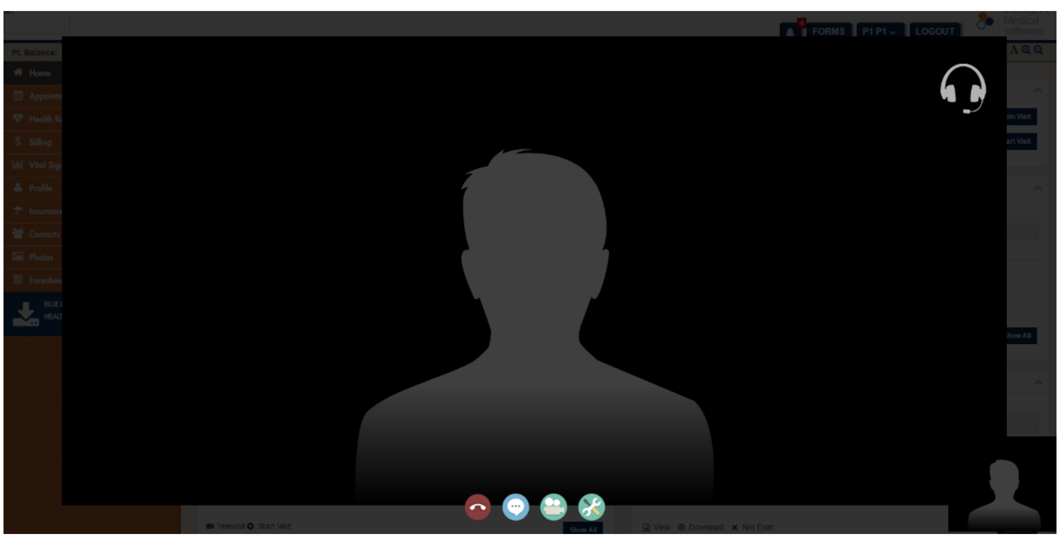


Figure 61 On the video platform, wait for the provider to join the televisit session to begin the appointment.

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**.

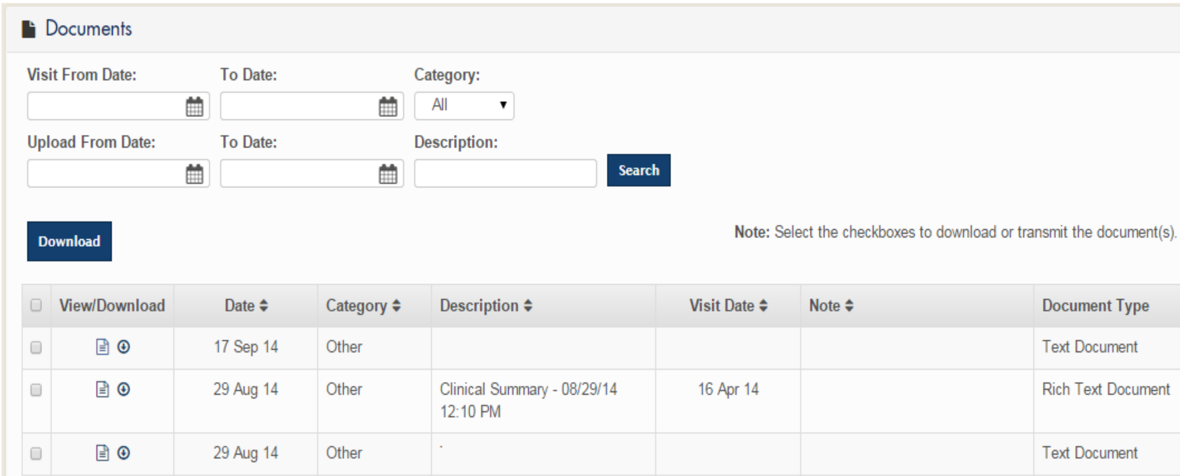


Figure 62 In **Documents**, enter your search criteria, and then click **Search** to retrieve a particular document.

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

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

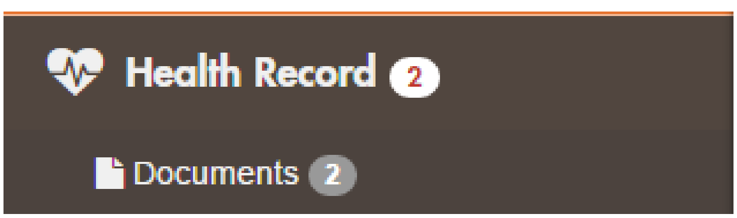


Figure 63 **Documents** displays the number of unread documents.

Download a document.

To download a document, do any of the following:

- To download a document, click the download symbol 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**.

Transmit a document.

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**.

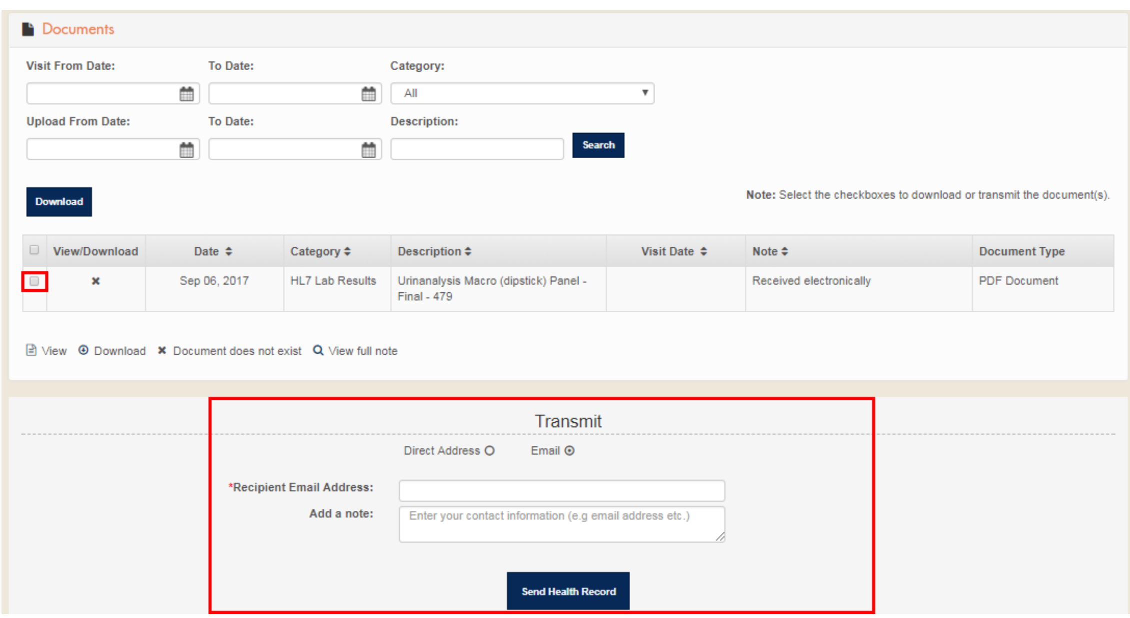


Figure 64 Select the check box in the leftmost column, and then enter the applicable information in the **Transmit** section to transmit the selected document.

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

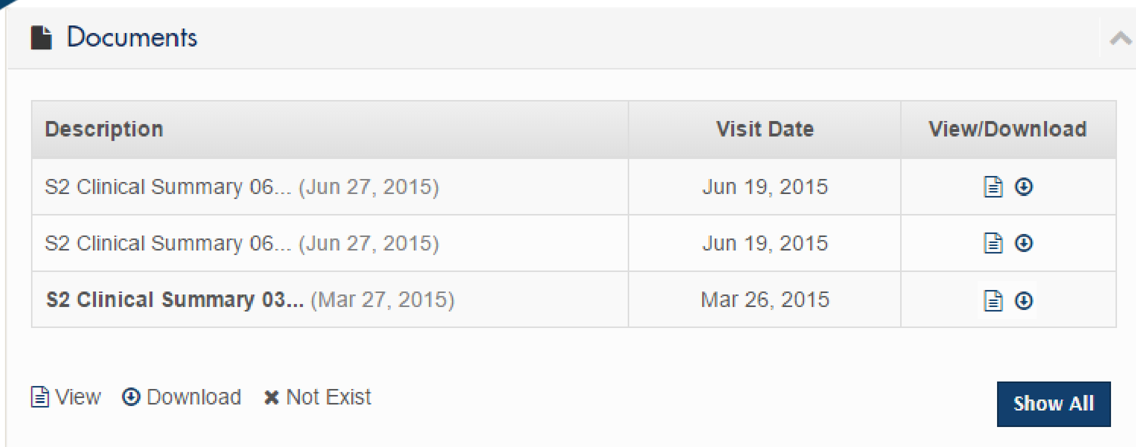


Figure 65 Documents on the dashboard

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

- **View**. Click the **View** symbol to open a document.
- **Download**. Click the **Download** symbol 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 or the **Download** symbol in the **View/Download** column of a care plan to view or download the care plan.

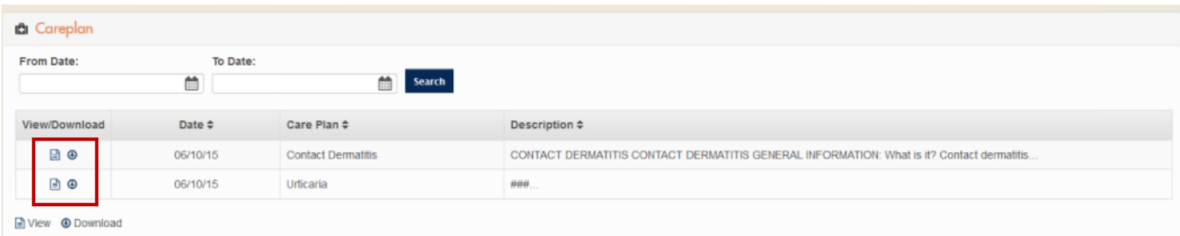


Figure 66 Click the **View** symbol in **Careplan** to open the **Care Plan Detail** page.

4. Review the care plan in **Careplan Detail**.

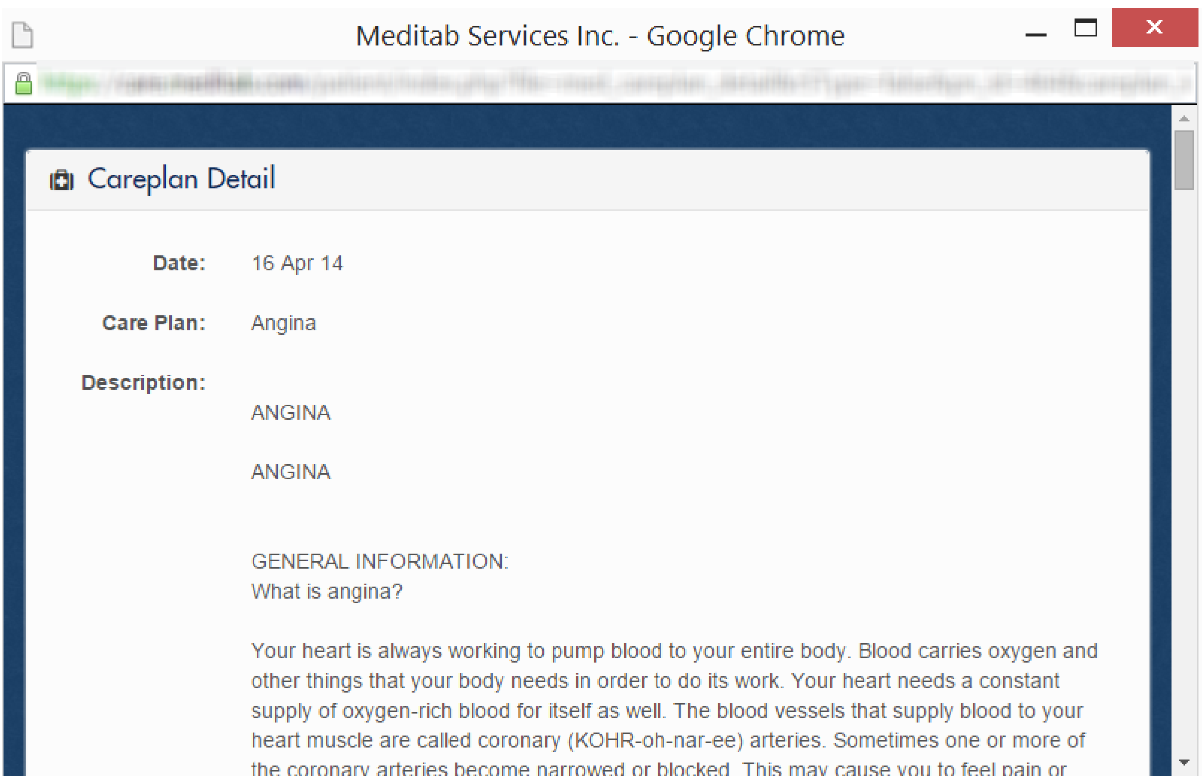


Figure 67 The **Careplan Detail** window

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.

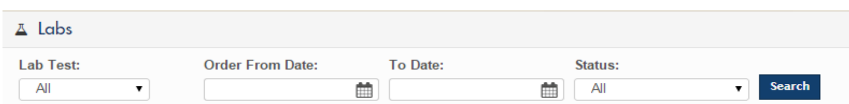


Figure 68 In **Labs**, specify your search criteria, and then click **Search** to retrieve the laboratory order record that you want to view.

3. Click **Search**.

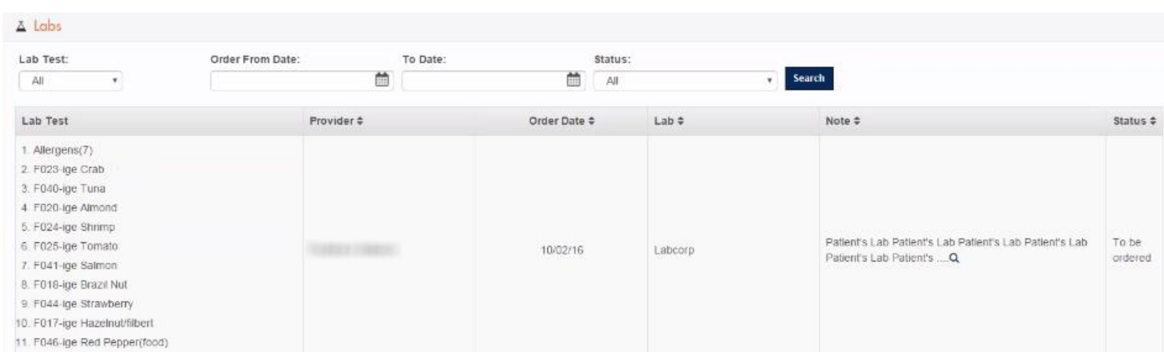


Figure 69 The **Labs** pane

4. Do either of the following:

- Click the **View full note** symbol to view the full note of a selected laboratory test.

- If results are already available, click the **Result** symbol to view them.

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

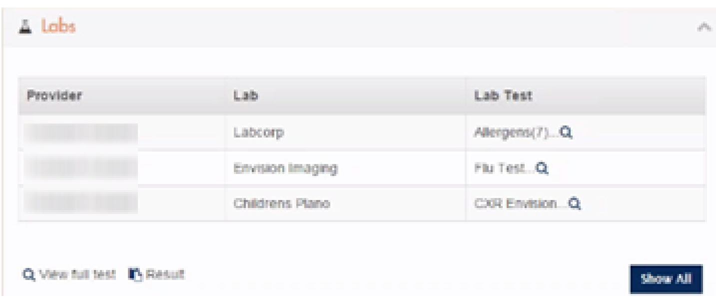


Figure 70 Labs on the dashboard

You can find the following features in **Labs**:

- **View full test** symbol. Click the **View full test** symbol to view the details of a laboratory test.

- **Result** symbol. 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**.

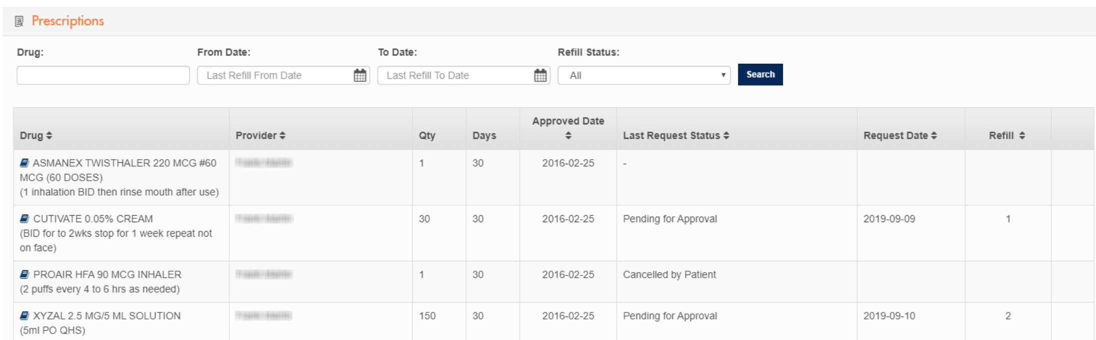


Figure 71 Enter your search criteria in **Prescriptions**, and then click **Search** to view the prescription that you want.

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 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 of the refill request that you want to edit.

To view the note of a prescription's status, click the **View Status Note** symbol 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 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.

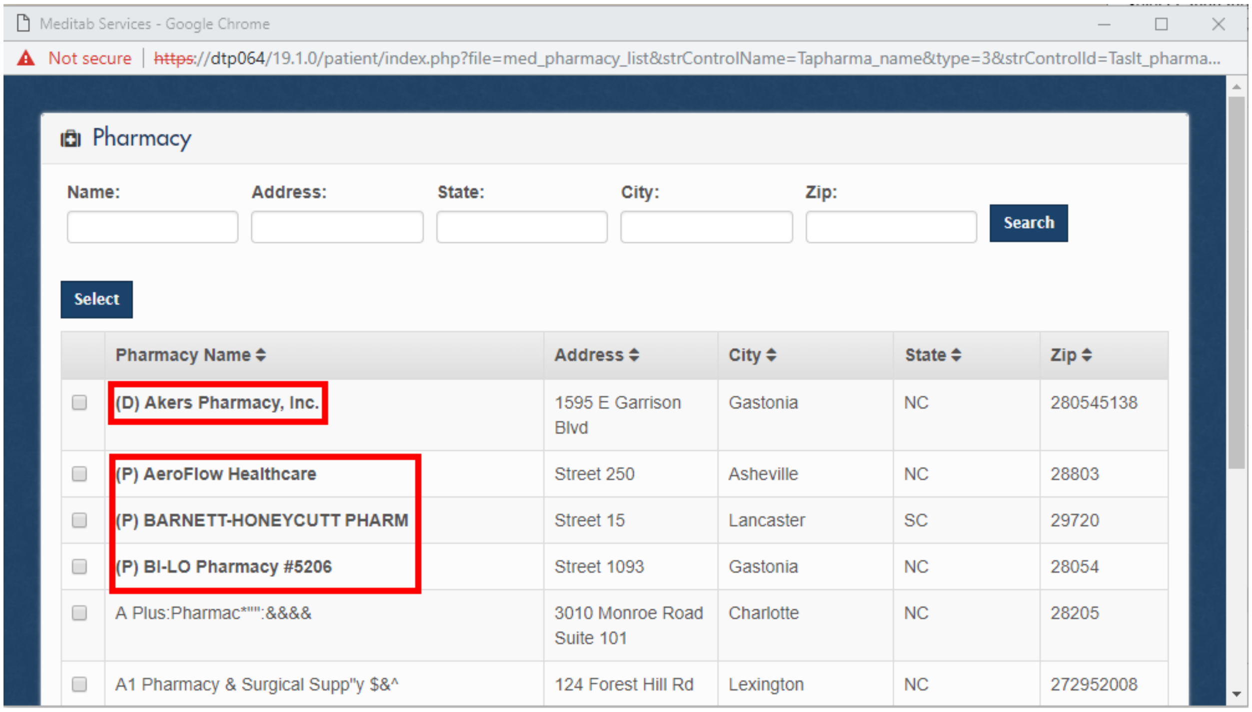


Figure 72 In the **Pharmacy** window, **(D)** appears on the left side of the default pharmacy, and **(P)** appears on the left side of the preferred pharmacy.

2. Click **Send Refill Request**.

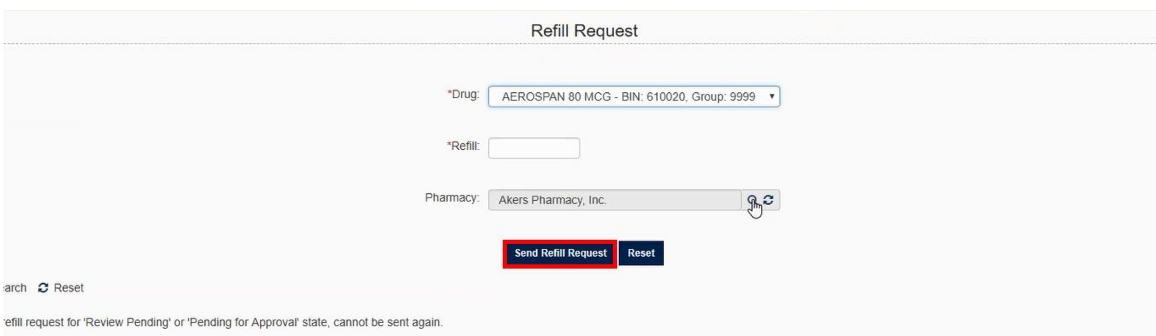


Figure 73 In the **Refill Request** pane, enter the applicable information, and then click **Send Refill Request** to request a refill for the selected drug.

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.

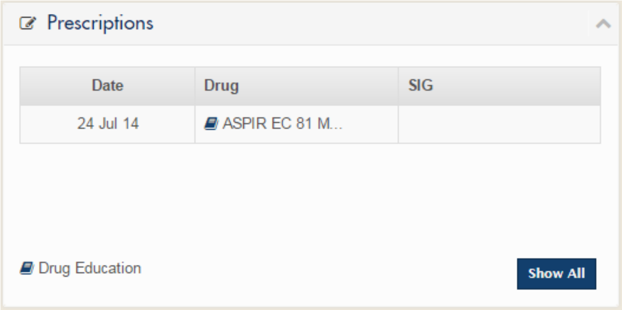


Figure 74 Prescriptions on the dashboard

In the **Prescriptions** pane, click the **Drug Education** symbol 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.

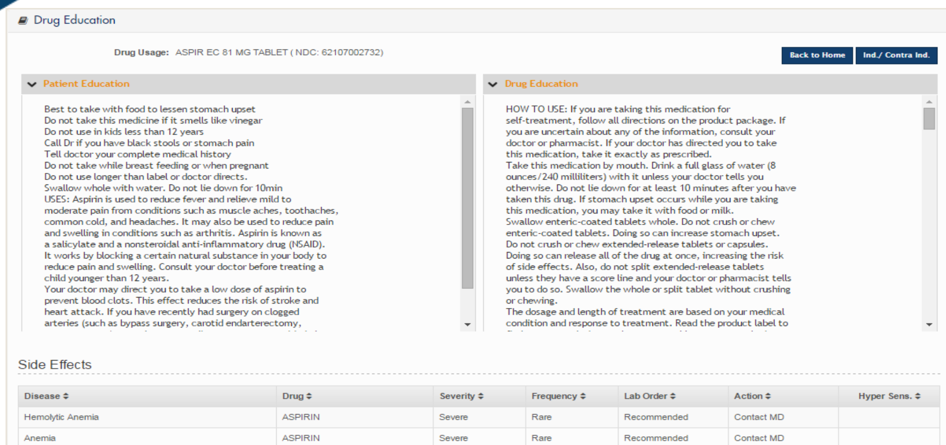


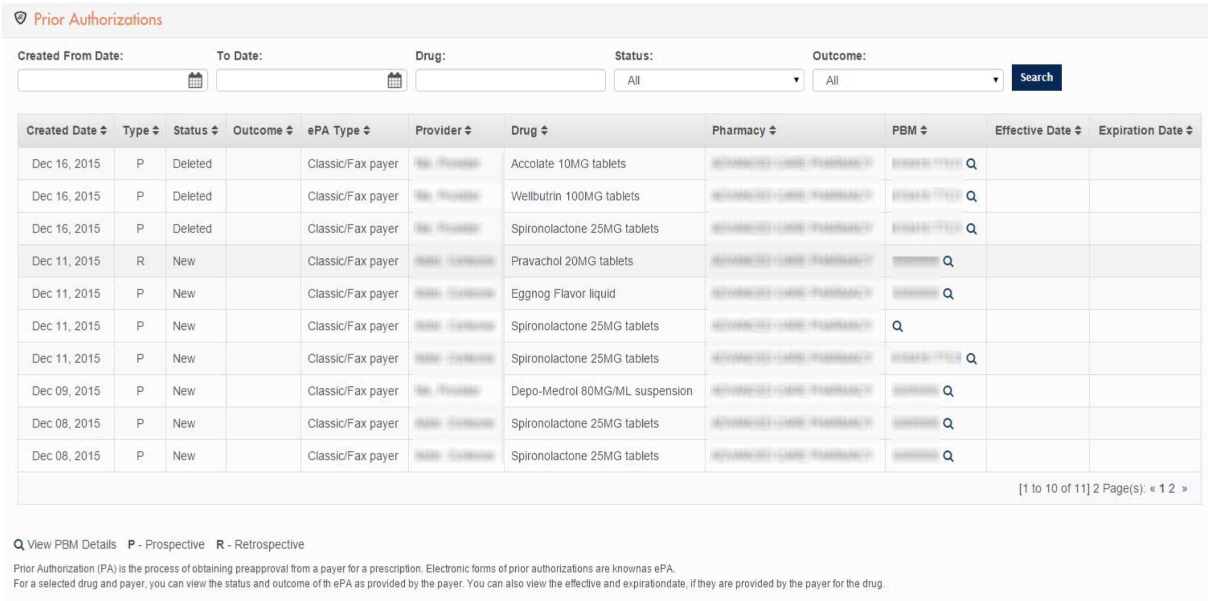
Figure 75 Drug Education in Prescriptions on the dashboard

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**.



Created Date	Type	Status	Outcome	ePA Type	Provider	Drug	Pharmacy	PBM	Effective Date	Expiration Date
Dec 16, 2015	P	Deleted		Classic/Fax payer	[illegible]	Accolate 10MG tablets	[illegible]	[illegible]		
Dec 16, 2015	P	Deleted		Classic/Fax payer	[illegible]	Wellbutrin 100MG tablets	[illegible]	[illegible]		
Dec 16, 2015	P	Deleted		Classic/Fax payer	[illegible]	Spironolactone 25MG tablets	[illegible]	[illegible]		
Dec 11, 2015	R	New		Classic/Fax payer	[illegible]	Pravachol 20MG tablets	[illegible]	[illegible]		
Dec 11, 2015	P	New		Classic/Fax payer	[illegible]	Eggnog Flavor liquid	[illegible]	[illegible]		
Dec 11, 2015	P	New		Classic/Fax payer	[illegible]	Spironolactone 25MG tablets	[illegible]			
Dec 11, 2015	P	New		Classic/Fax payer	[illegible]	Spironolactone 25MG tablets	[illegible]	[illegible]		
Dec 09, 2015	P	New		Classic/Fax payer	[illegible]	Depo-Medrol 80MG/ML suspension	[illegible]	[illegible]		
Dec 08, 2015	P	New		Classic/Fax payer	[illegible]	Spironolactone 25MG tablets	[illegible]	[illegible]		
Dec 08, 2015	P	New		Classic/Fax payer	[illegible]	Spironolactone 25MG tablets	[illegible]	[illegible]		

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 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.

Prior Authorizations

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	

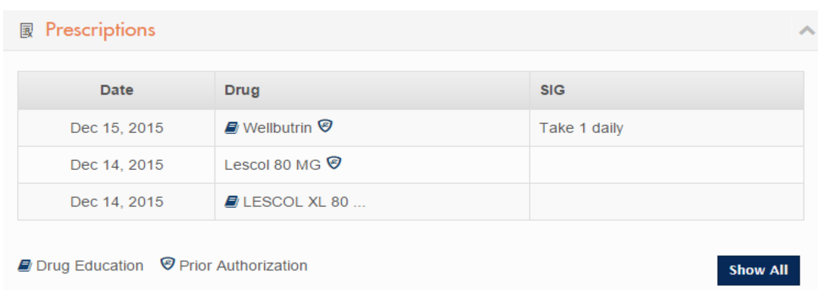
Show All

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 of a prescription.



Prescriptions

Date	Drug	SIG
Dec 15, 2015	Wellbutrin	Take 1 daily
Dec 14, 2015	Lescol 80 MG	
Dec 14, 2015	LESCOL XL 80 ...	

Drug Education Prior Authorization

Show All

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.

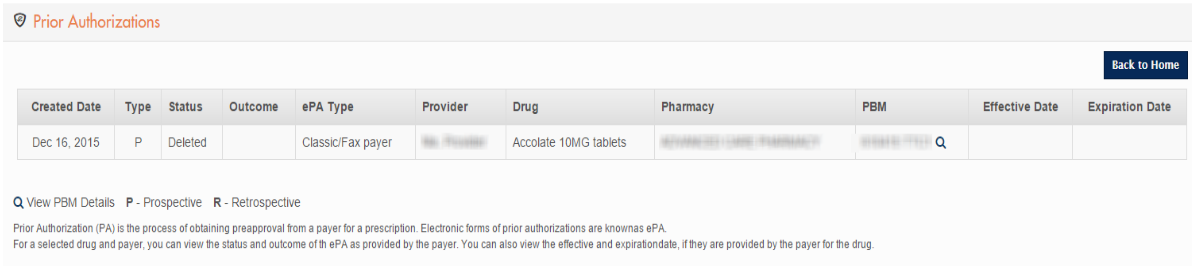


Figure 79 The prior authorization details of a prescription

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**.

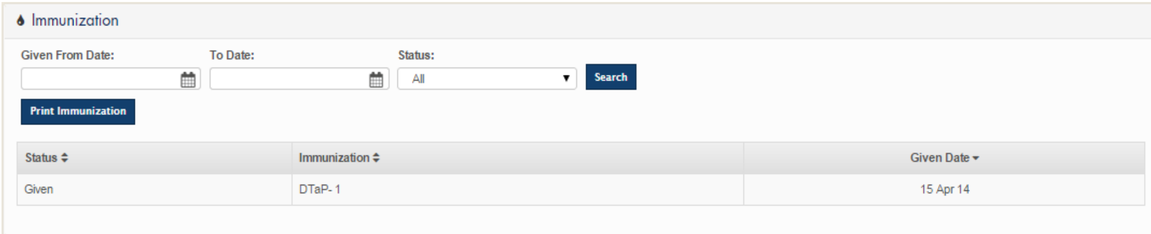


Figure 80 In **Immunization**, enter your search criteria, and then click **Search** to view the immunization that you want.

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.

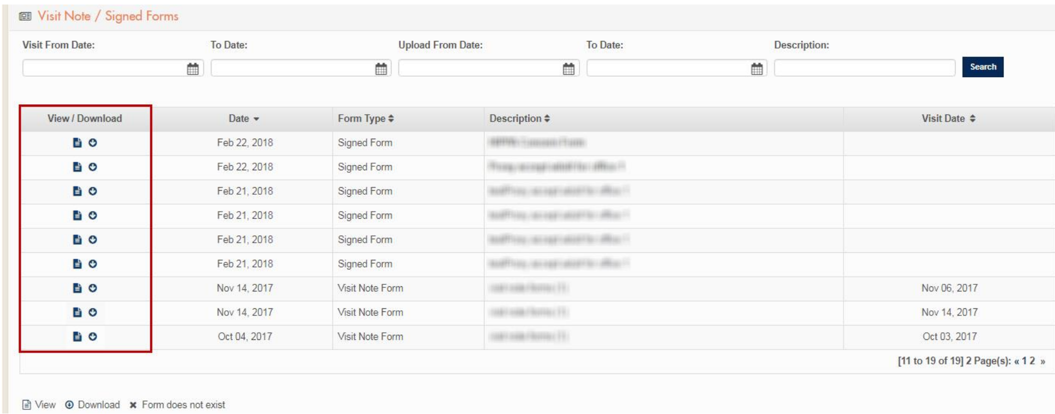


Figure 81 In the **Visit Note/Signed Forms** column, click the **View** symbol to view the applicable forms or click the **Download** symbol to download the applicable forms.

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**.

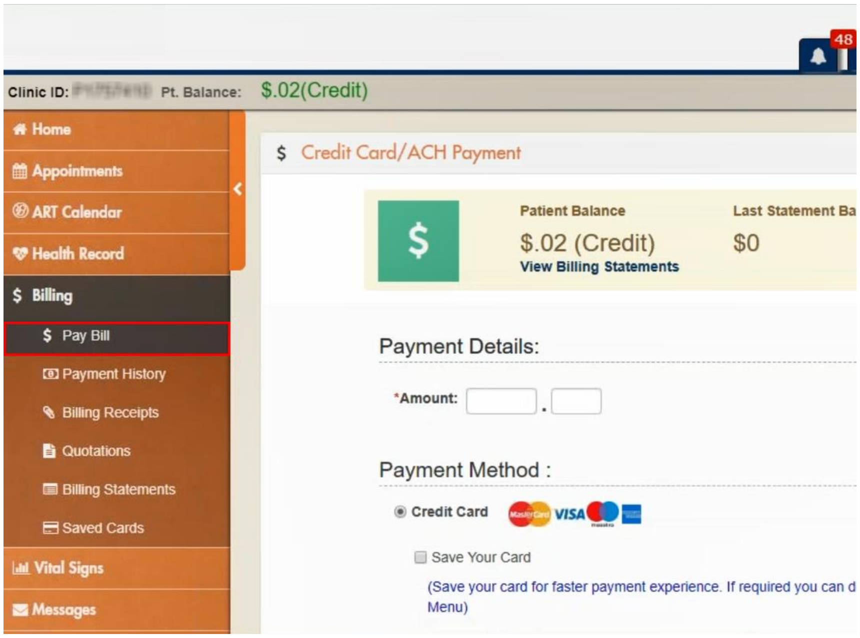


Figure 82 On the menu bar, click **Billing**, and then click **Pay Bill**.

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 **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**.

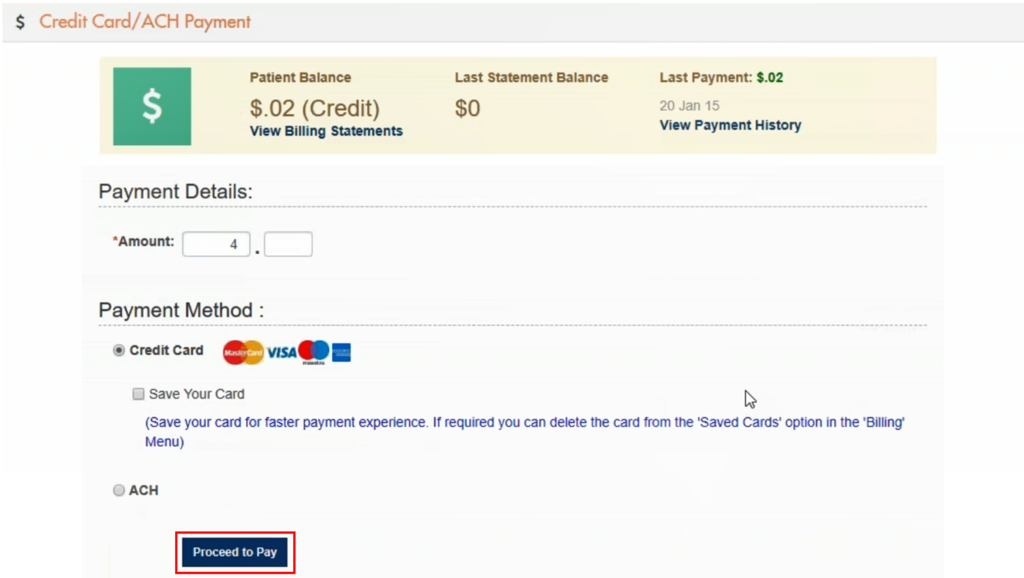


Figure 83 In the **Credit Card/ACH Payment** pane, enter the necessary information, and then click **Proceed to Pay**.

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

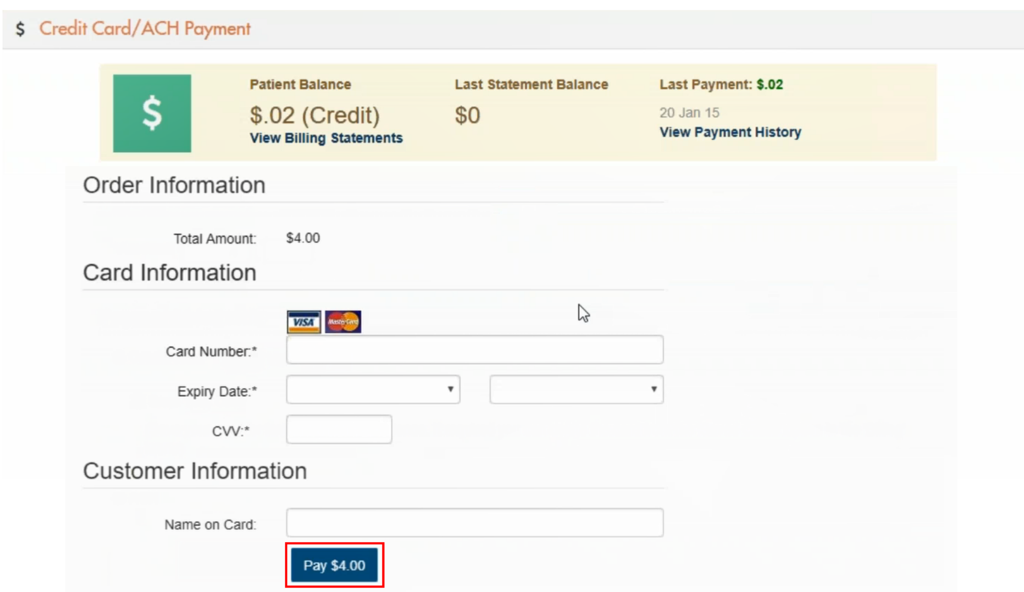


Figure 84 On the following page of **Credit Card/ACH Payment**, enter the necessary credit card information, and then click **Pay *Amount***.

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

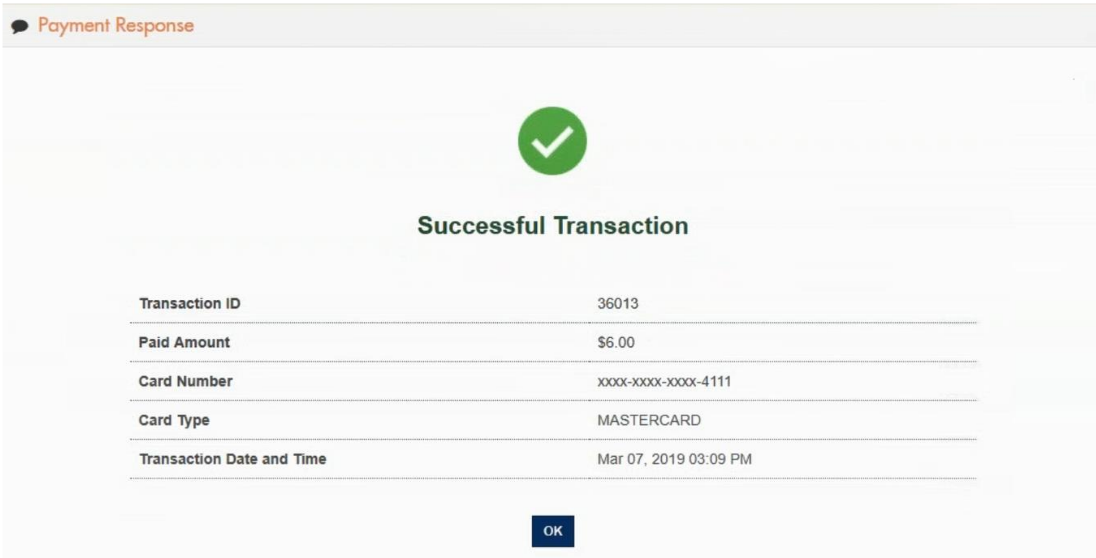


Figure 85 The **Payment Response** pane of IMS CarePortal that shows a successful confirmation

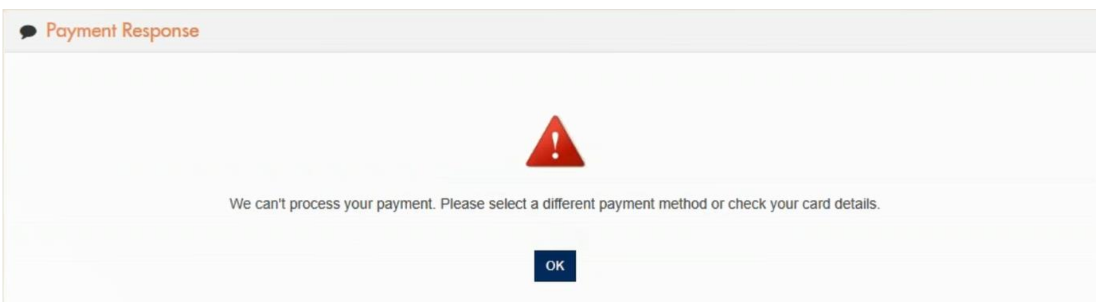


Figure 86 The **Payment Response** pane of IMS CarePortal that shows a failed confirmation

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.

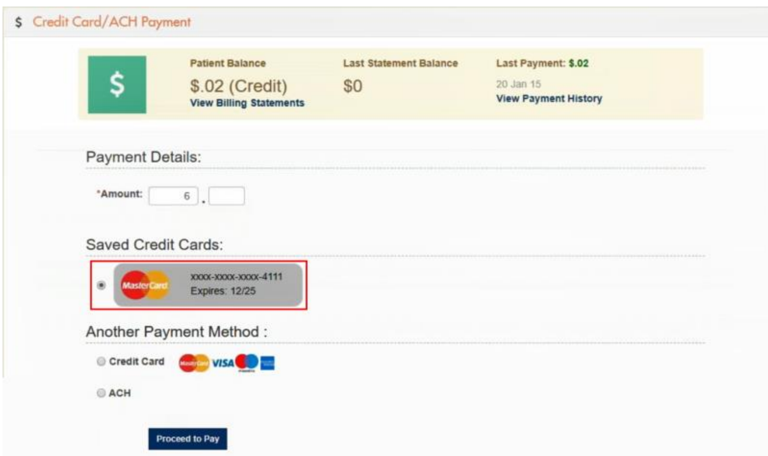


Figure 87 The **Saved Credit Cards** section showing the saved credit cards

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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.

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

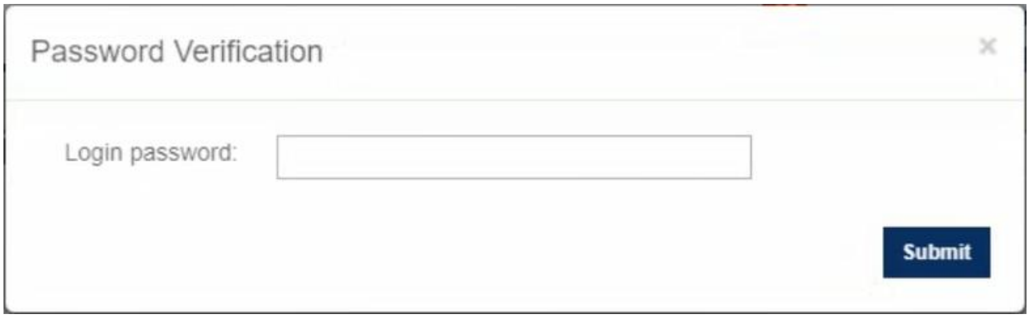


Figure 88 The **Password Verification** window

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**.

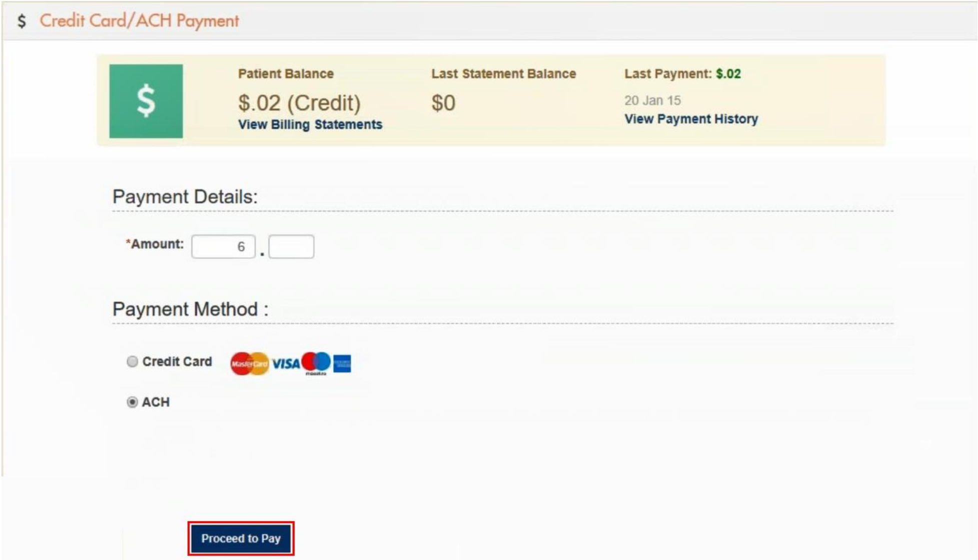


Figure 89 In the **Credit Card/ACH Payment** pane, enter the necessary information, and then click **Proceed to Pay**.

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

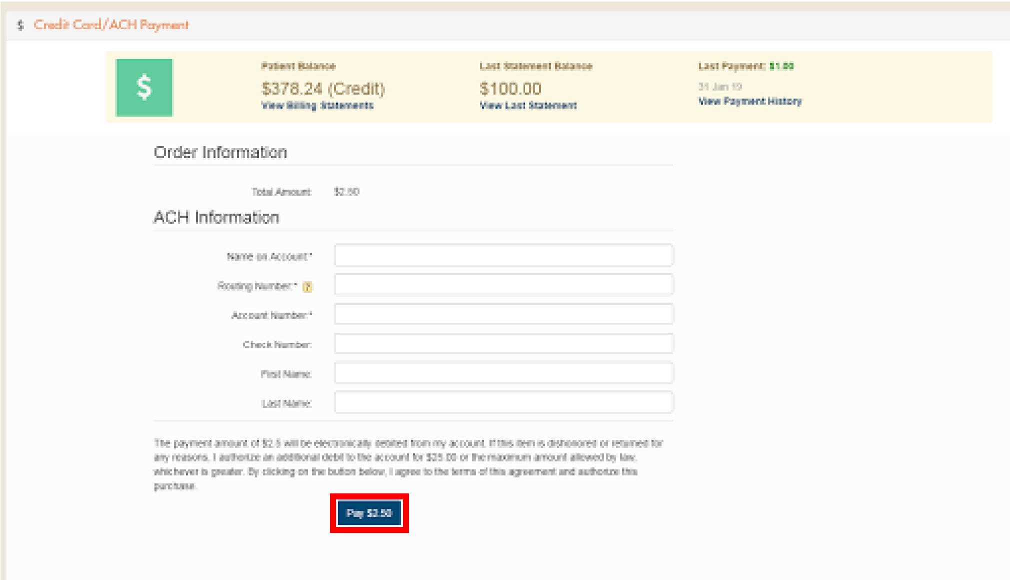


Figure 90 In the **ACH Information** section on the following page, enter the necessary ACH information, and then click **Pay *Amount***.

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**.

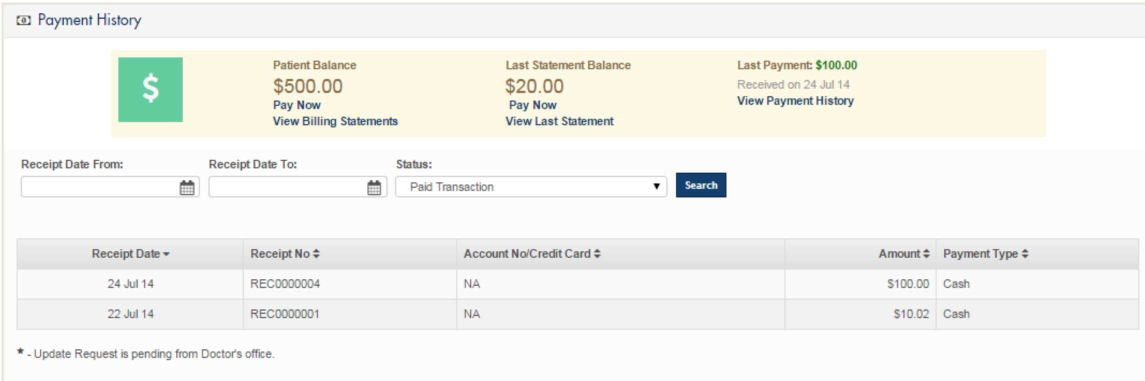


Figure 91 Enter your search criteria in **Payment History**, and then click **Search** to view the payment details that you want.

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**.

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 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**.
2. 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**.

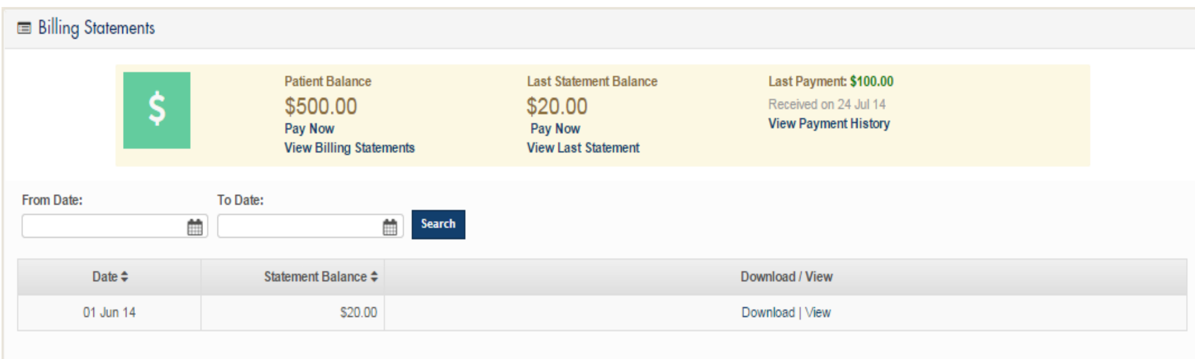


Figure 93 Enter your search criteria in **Billing Statements**, and then click **Search** to display the billing statement that you want to download or view.

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.

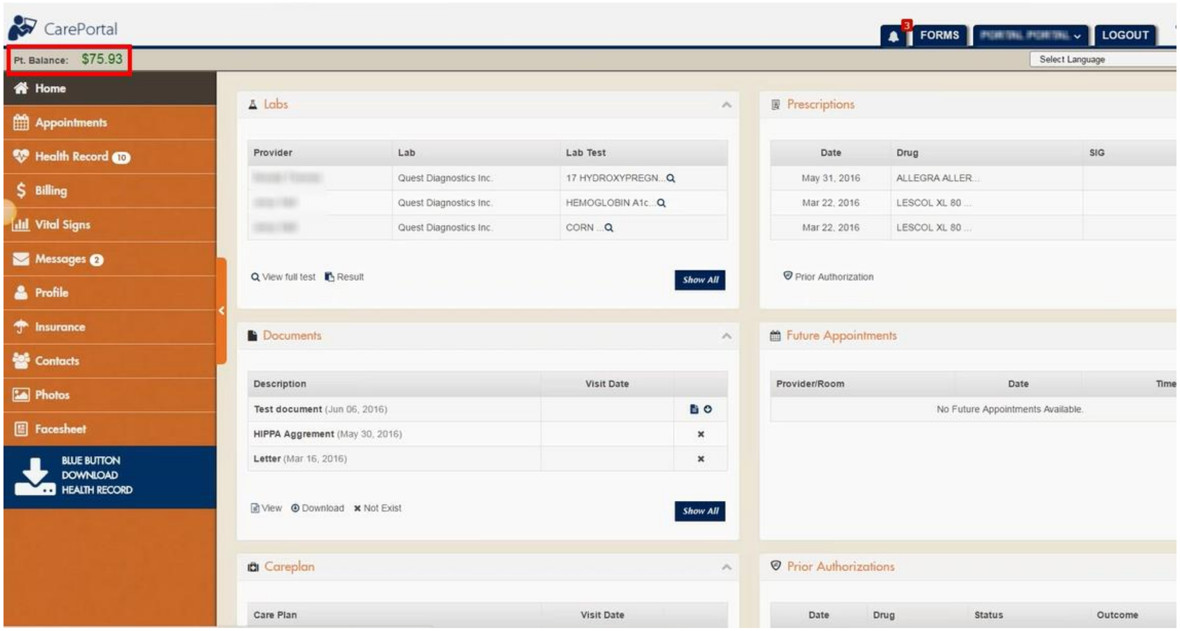


Figure 94 The patient balance is displayed in the upper-left portion of the IMS CarePortal home page.

- **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.

Figure 95 The details displayed in 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**.

Quotations

View	No.	Date	Description	Procedure(s)	Room	Total Amt.	Balance	Schedule Dt.	Pay
	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 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**.

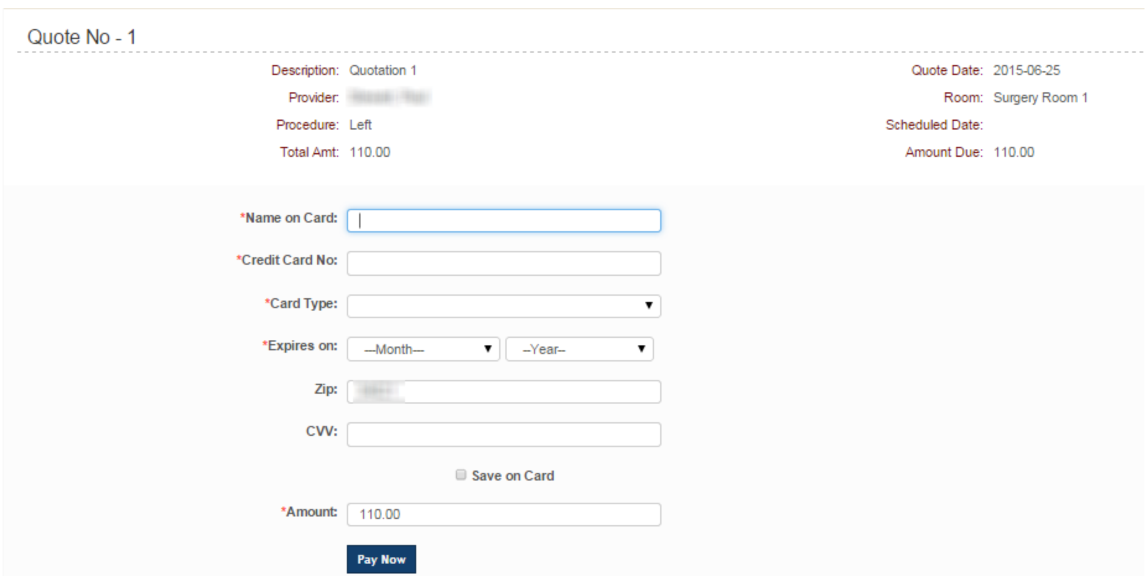


Figure 97 To complete a payment, enter the applicable payment information of the quotation on the quote payment page, and then click **Pay Now**.

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**.

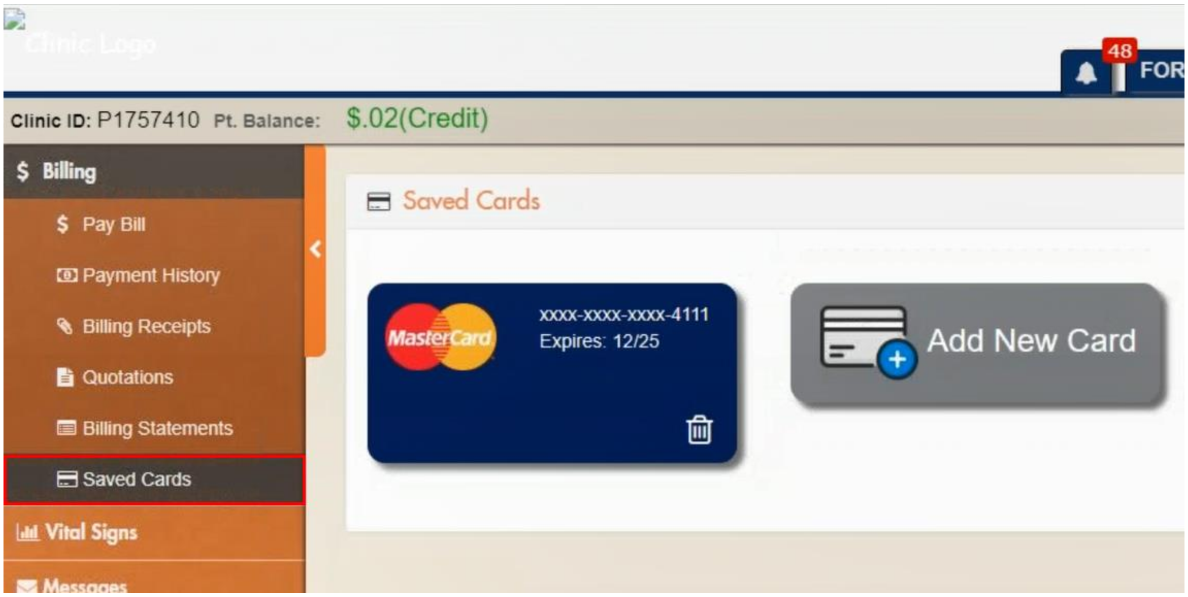


Figure 98 On the menu bar, click **Billing**, and then click **Saved Cards**.

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**.

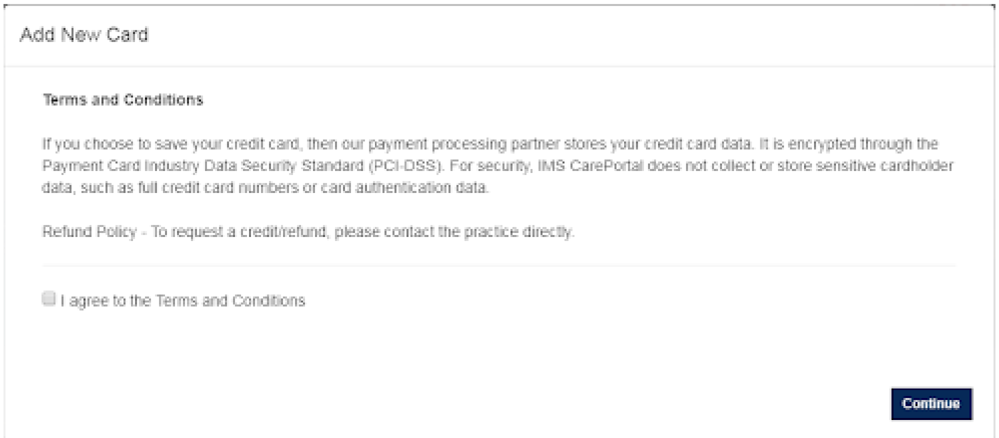


Figure 99 In the Add New Card window select the I agree to the Terms and Conditions check box, and then click Continue.

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

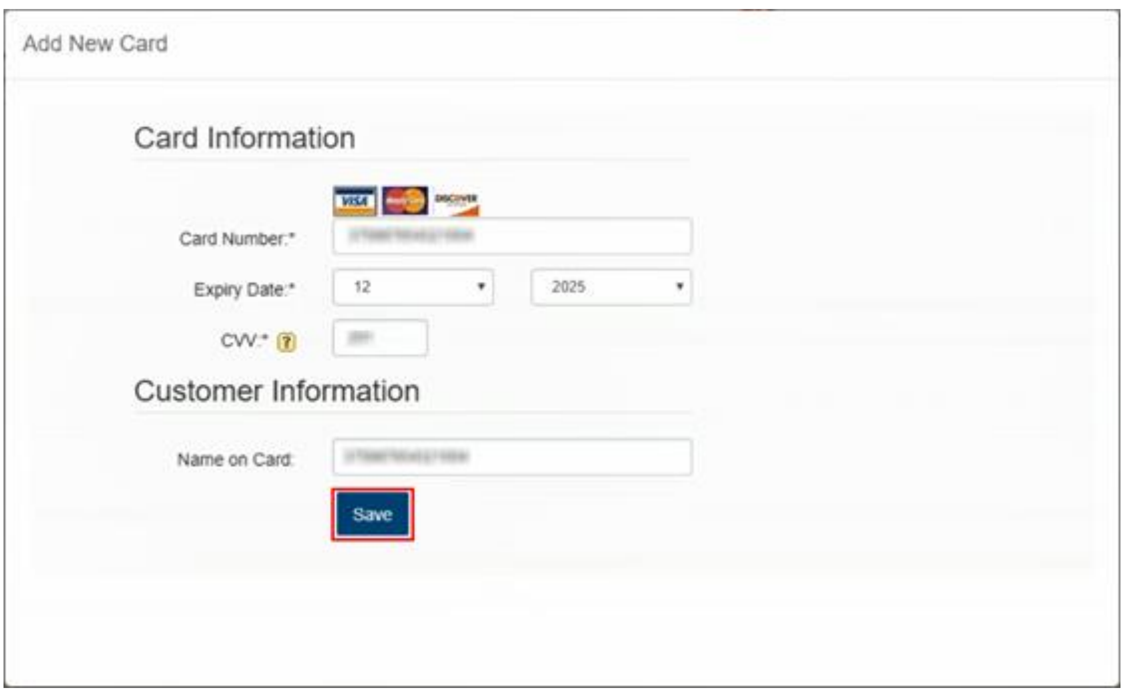


Figure 100 In the following window of Add New Card, enter the necessary credit card information, and then click Save.

5. When the “Card Added Successfully” message appears, click **OK**.

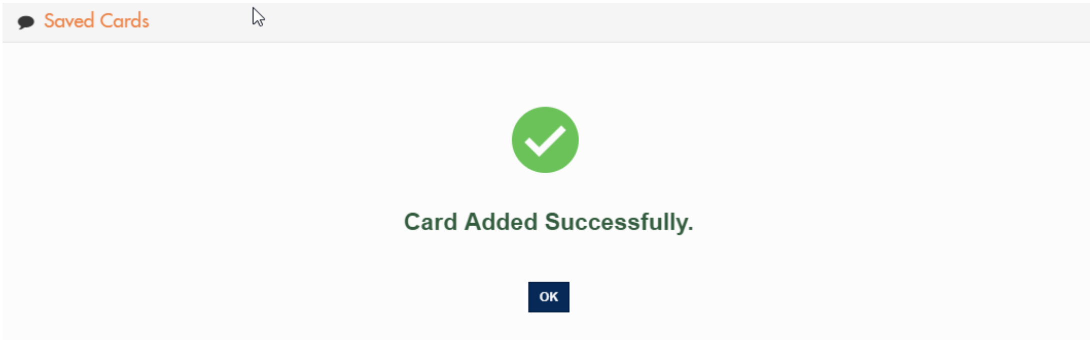


Figure 101 When the "Card Added Successfully" message appears in **Saved Cards**, click **OK**.

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 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**.

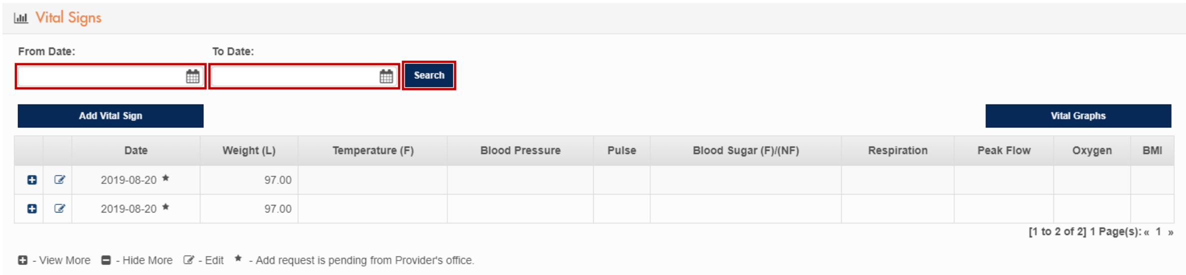


Figure 102 In **Vital Signs**, enter the applicable date range in **From Date** and **To Date**, and then click **Search** to view the recorded vital signs.

Note:

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

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.

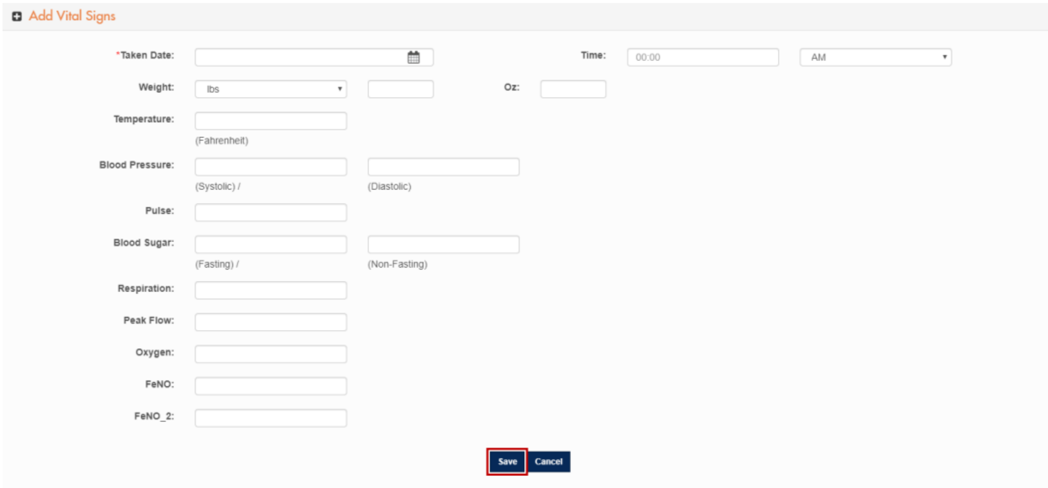


Figure 104 In **Add Vital Signs**, enter the applicable information, and then click **Save** to add new vital signs.

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.

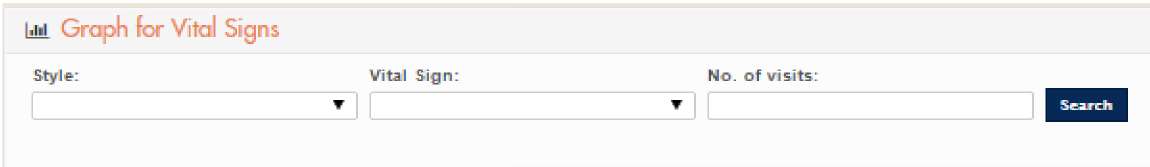


Figure 105 In the **Graph for Vital Signs** pane, enter the applicable information to filter the graph that you want to generate.

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

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.

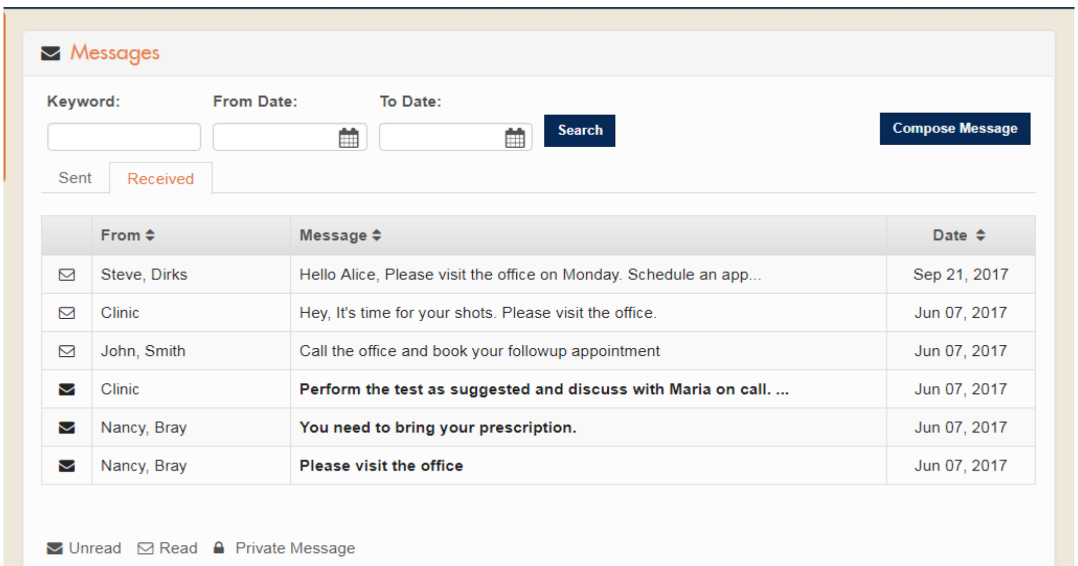


Figure 107 To view a message in **Messages**, click the **Sent** or **Received** tab.

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**.

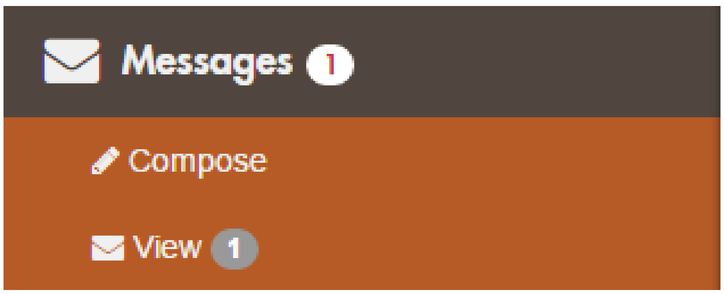


Figure 108 The **Messages** module displays the number of unread messages.

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.

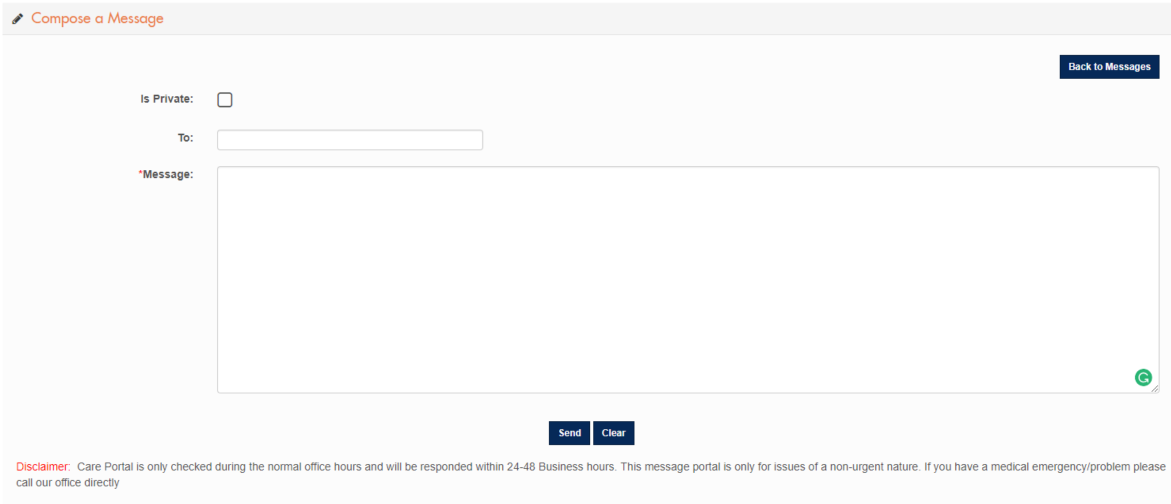


Figure 109 In **Compose a Message**, enter the applicable information, and then click **Send** to send your message.

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

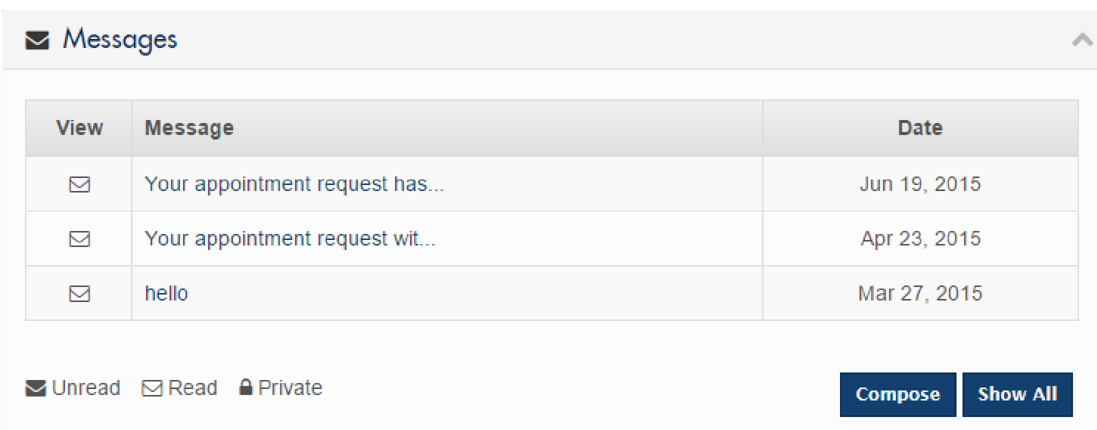


Figure 110 **Messages** on the dashboard

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**.

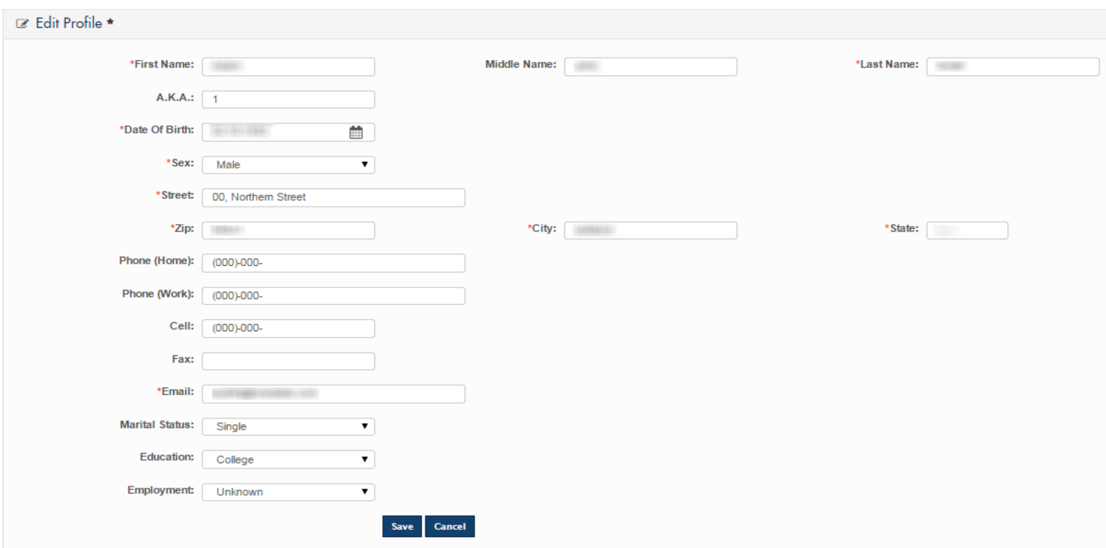


Figure 111 To edit your profile, make changes in **Edit Profile**, and then click **Save**.

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**.

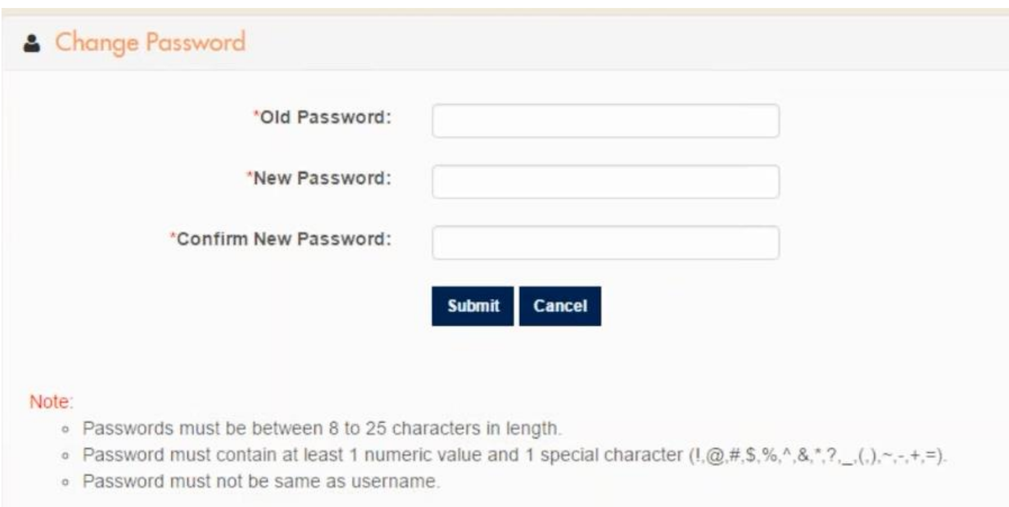


Figure 112 Enter the applicable information in **Change Password** to change your password.

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**.

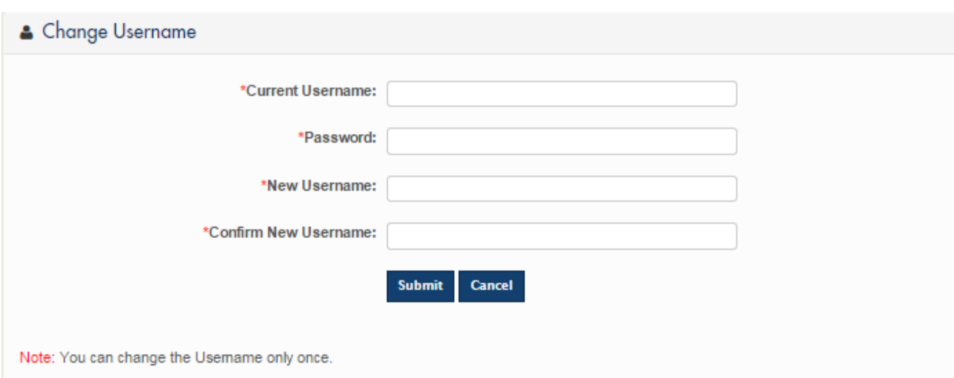


Figure 113 Enter the details in Change Username to change your username.

4. Click **Submit**.

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**.

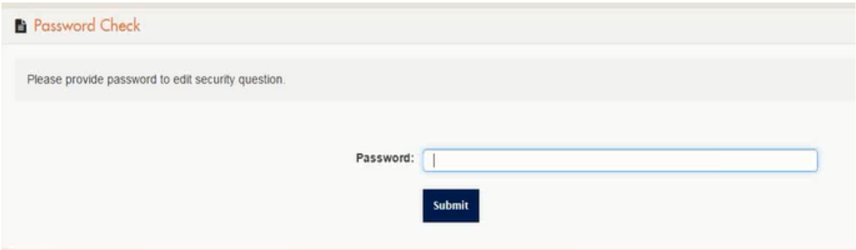


Figure 114 In the **Password Check** pane, enter your password, and then click **Submit** to open **Security Questions**.

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

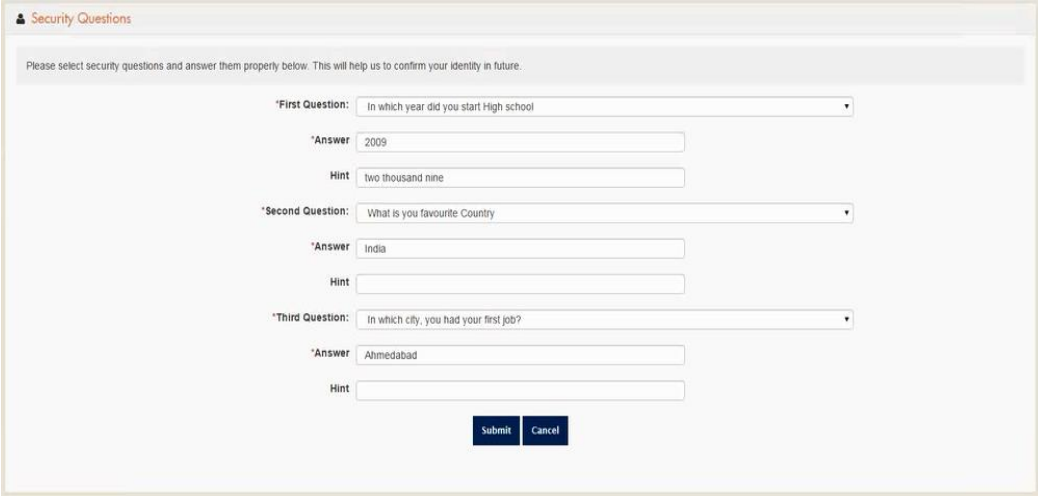


Figure 115 In the **Security Questions** pane, make the necessary changes, and then click **Submit** to save your changes.

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.

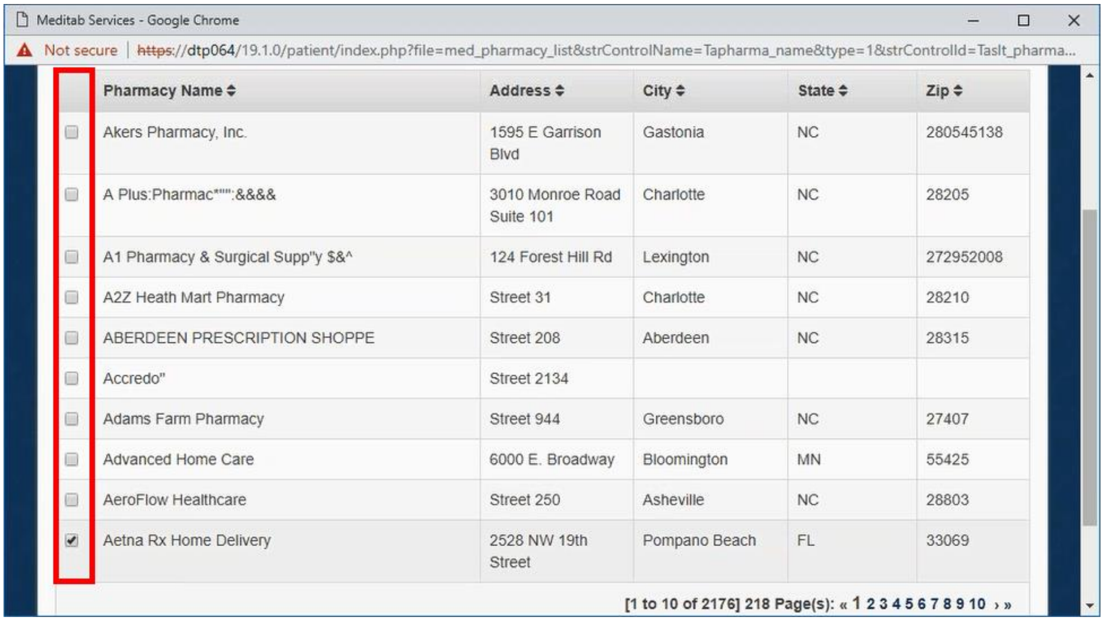


Figure 116 In the leftmost column of the **Default Pharmacy** window, select the check box for the applicable default pharmacy.

4. Click **Select**.

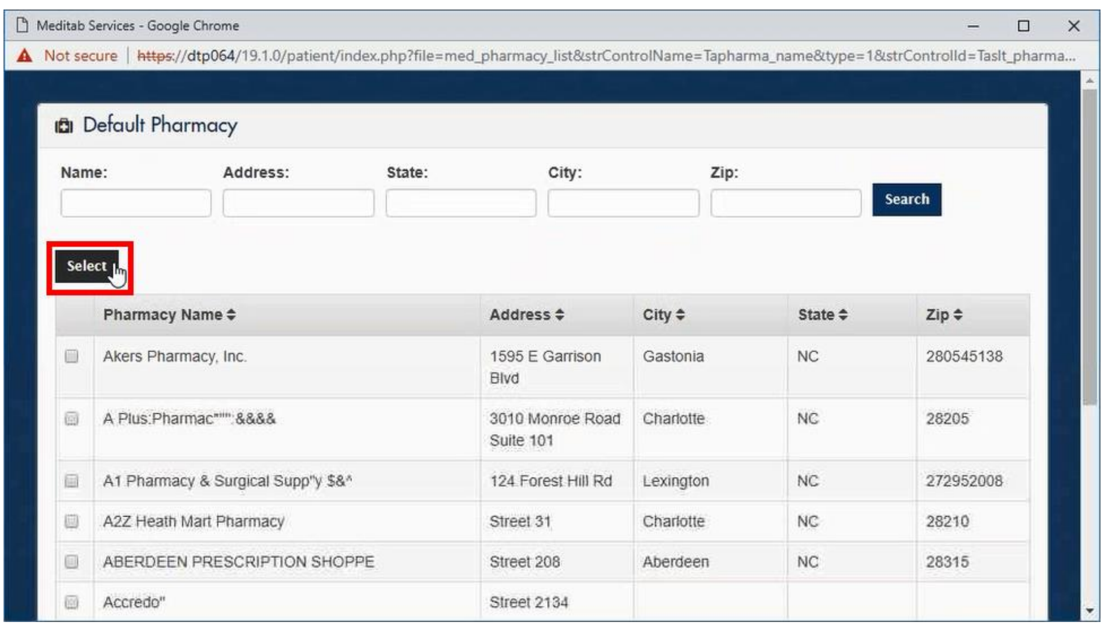


Figure 117 In the **Default Pharmacy** window, click **Select** to confirm your selection.

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.

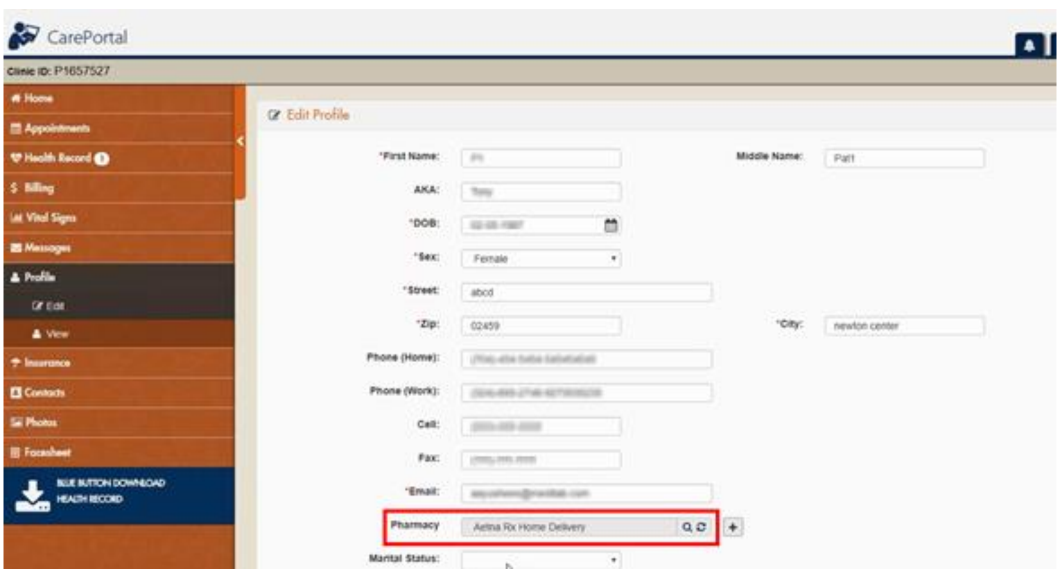


Figure 119 The **Pharmacy** box in the **Edit Profile** pane

Add a preferred pharmacy.

To add a preferred 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 **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.

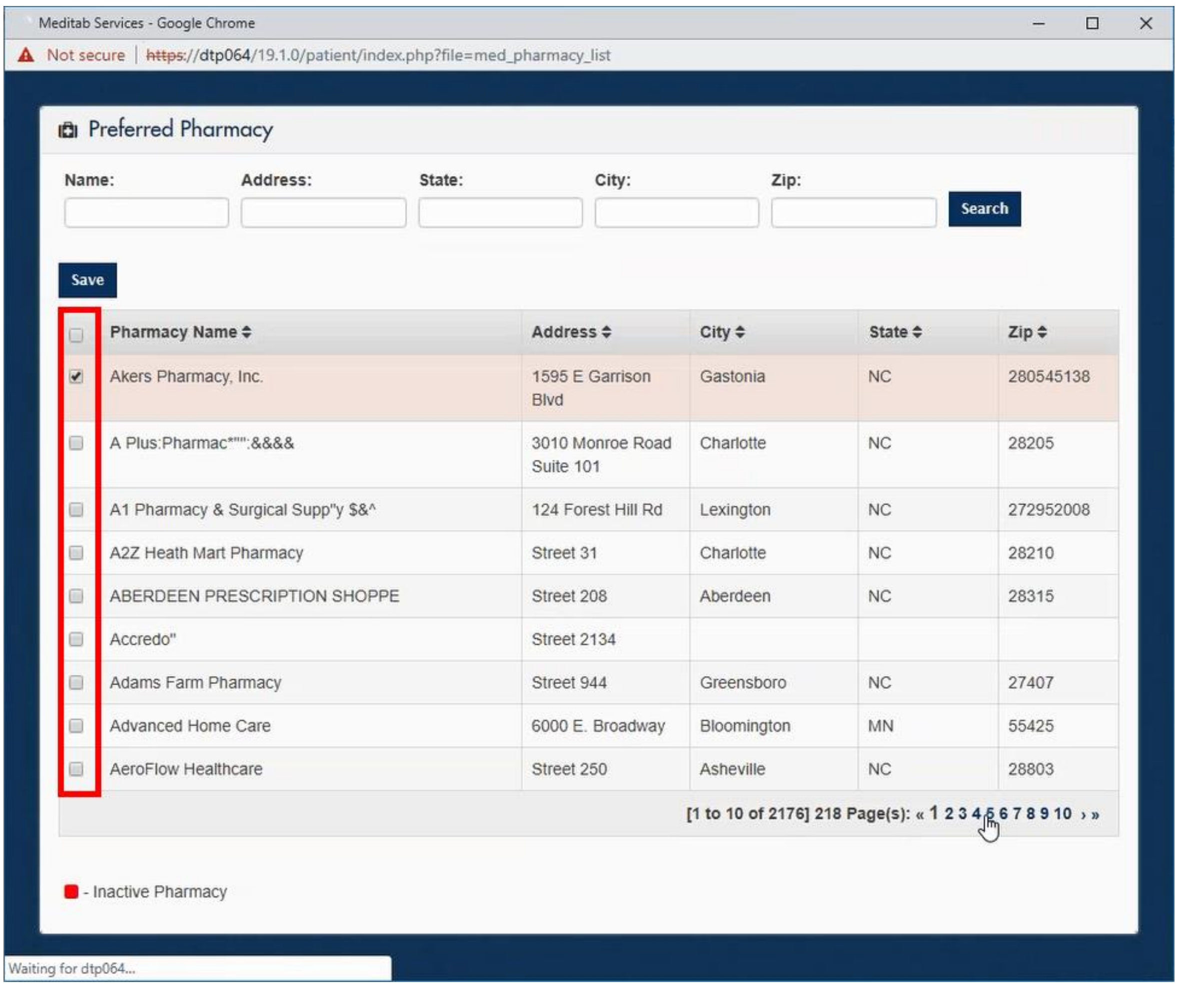


Figure 120 In the leftmost column of the **Preferred Pharmacy** window, select the check box for the applicable preferred pharmacy.

4. Click **Save**.

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

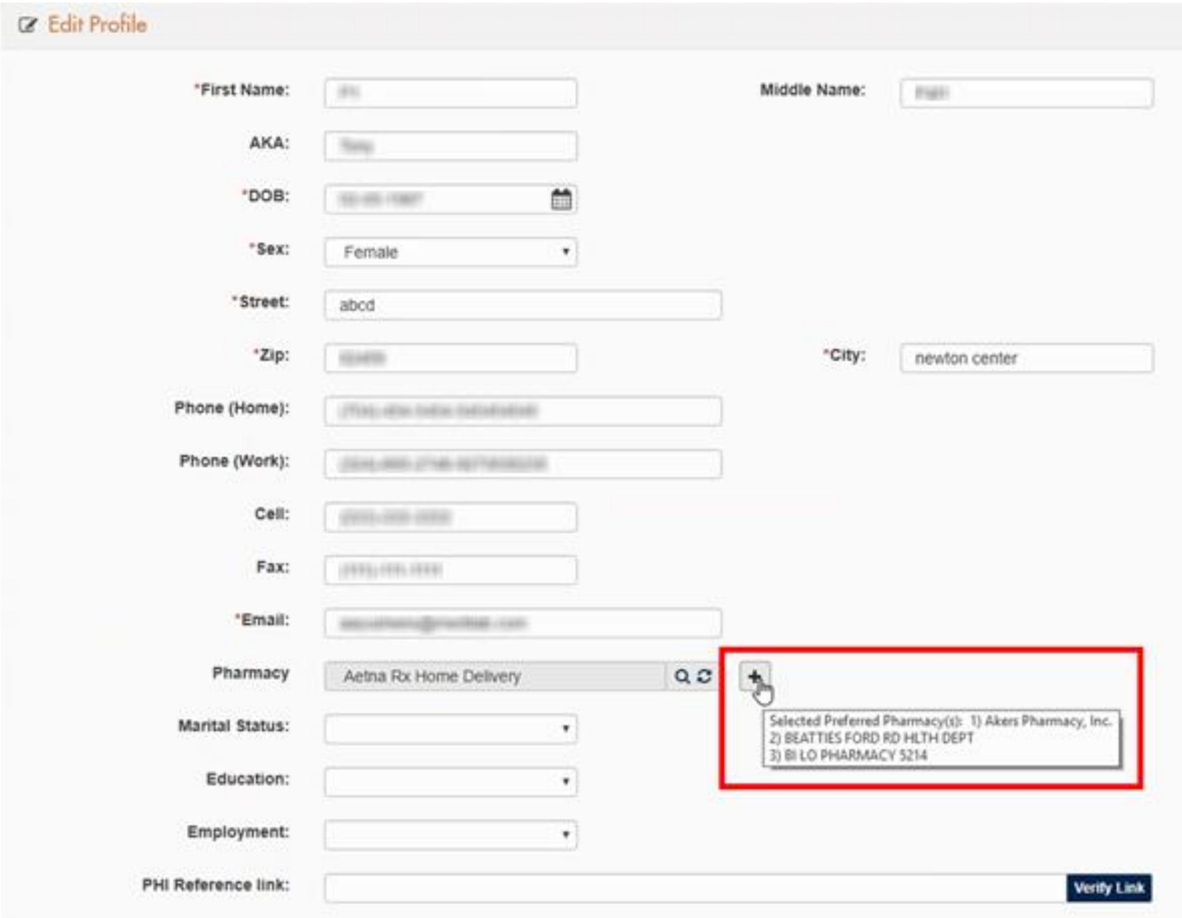


Figure 121 The selected pharmacies appear when you point to the **Selected preferred pharmacy(s)** symbol in the **Edit Profile** pane

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.

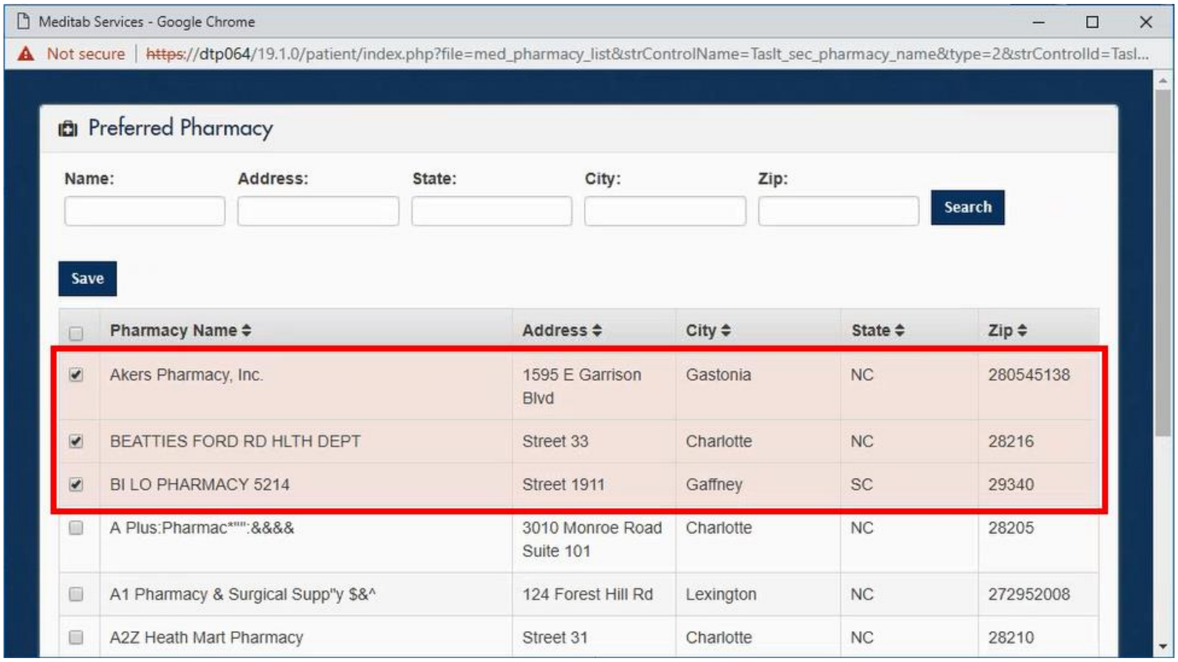


Figure 122 In the **Preferred Pharmacy** window, the existing preferred pharmacies appear at the top of the list.

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**.

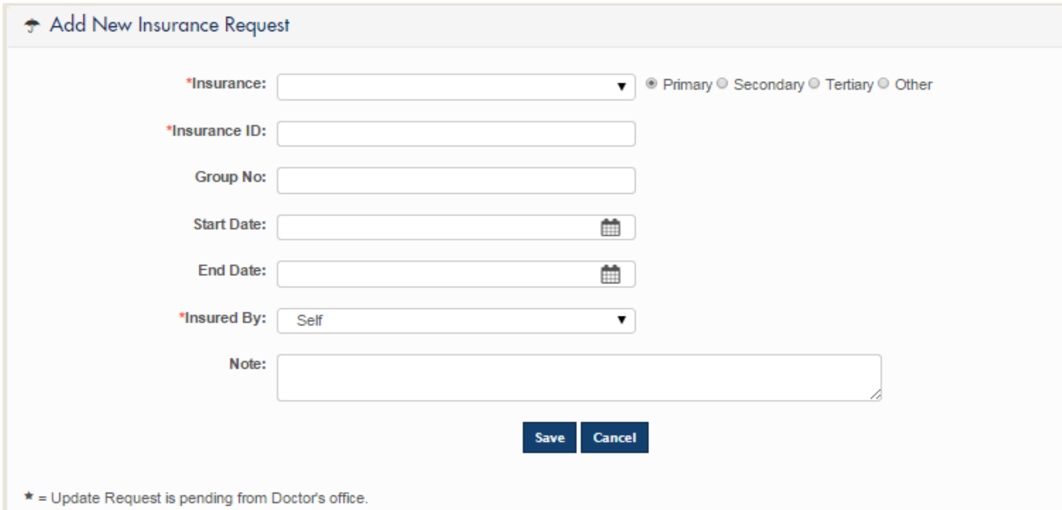


Figure 123 To add a new insurance, enter applicable information in **Add New Insurance Request**, and then click **Save**.

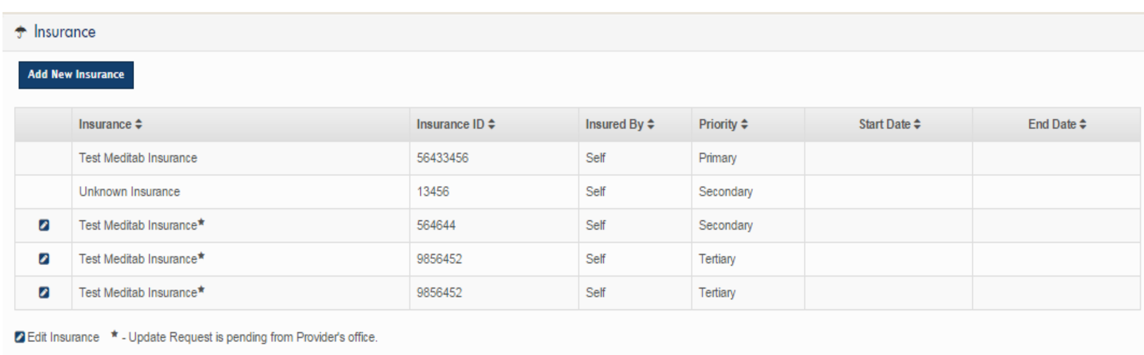
3. When the "Your request for save insurance detail has been sent successfully." message appears, click **Ok**.

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.



	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		
	Test Meditab Insurance*	9856452	Self	Tertiary		
	Test Meditab Insurance*	9856452	Self	Tertiary		

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**.

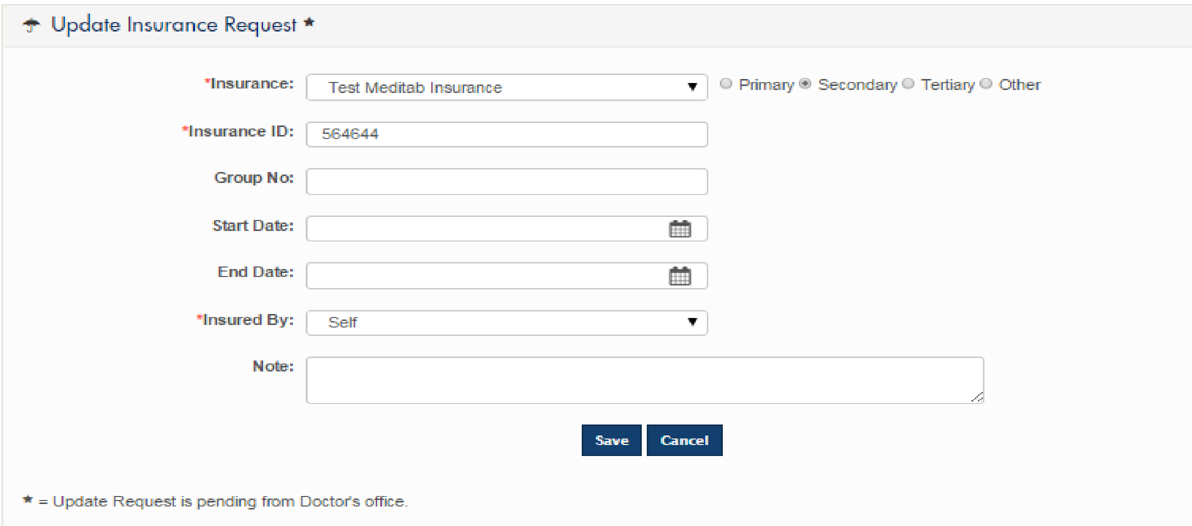


Figure 125 Make changes in **Update Insurance Request** to edit an insurance.

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.

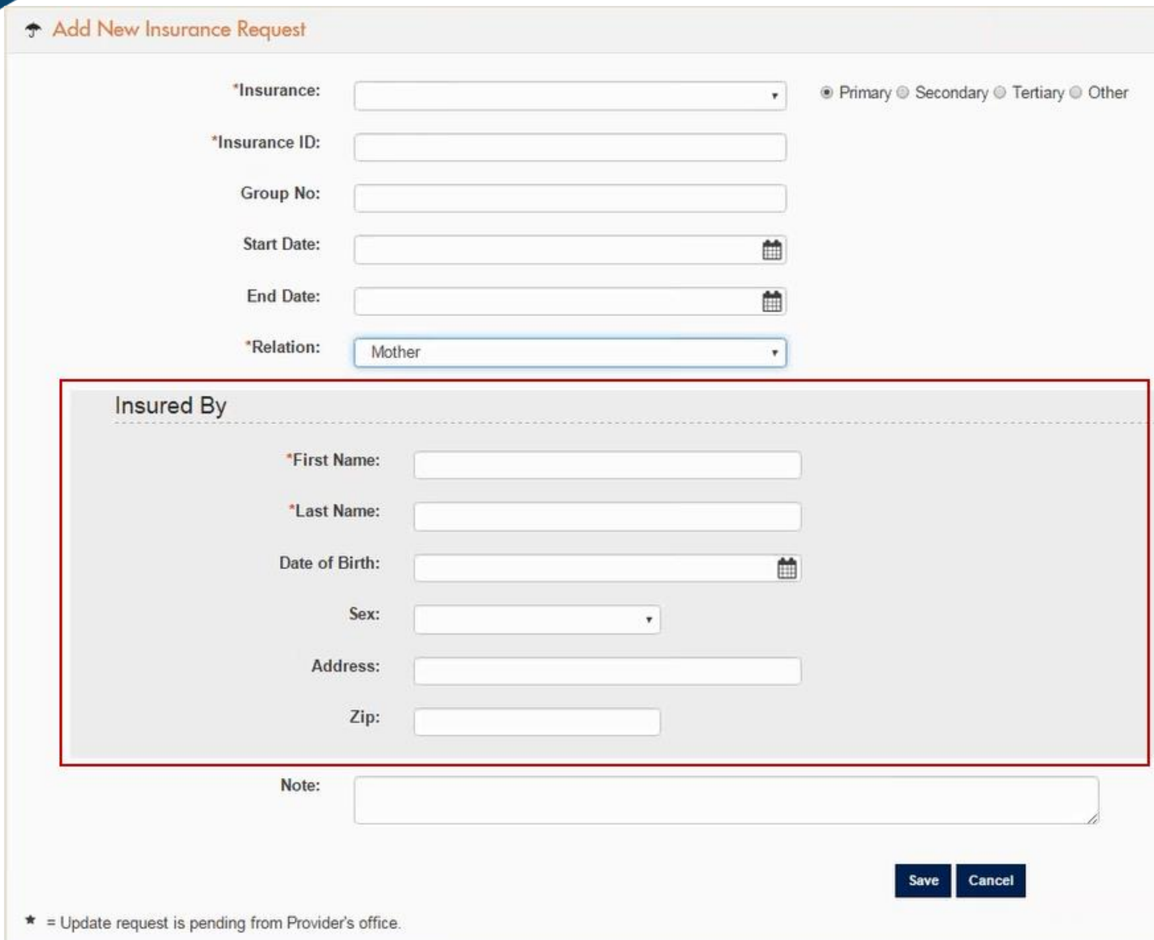


Figure 126 The **Insured By** section

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.

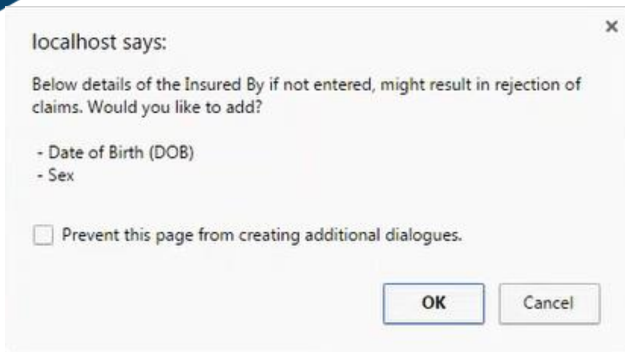


Figure 127 The message that appears after you save the insurance request

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.

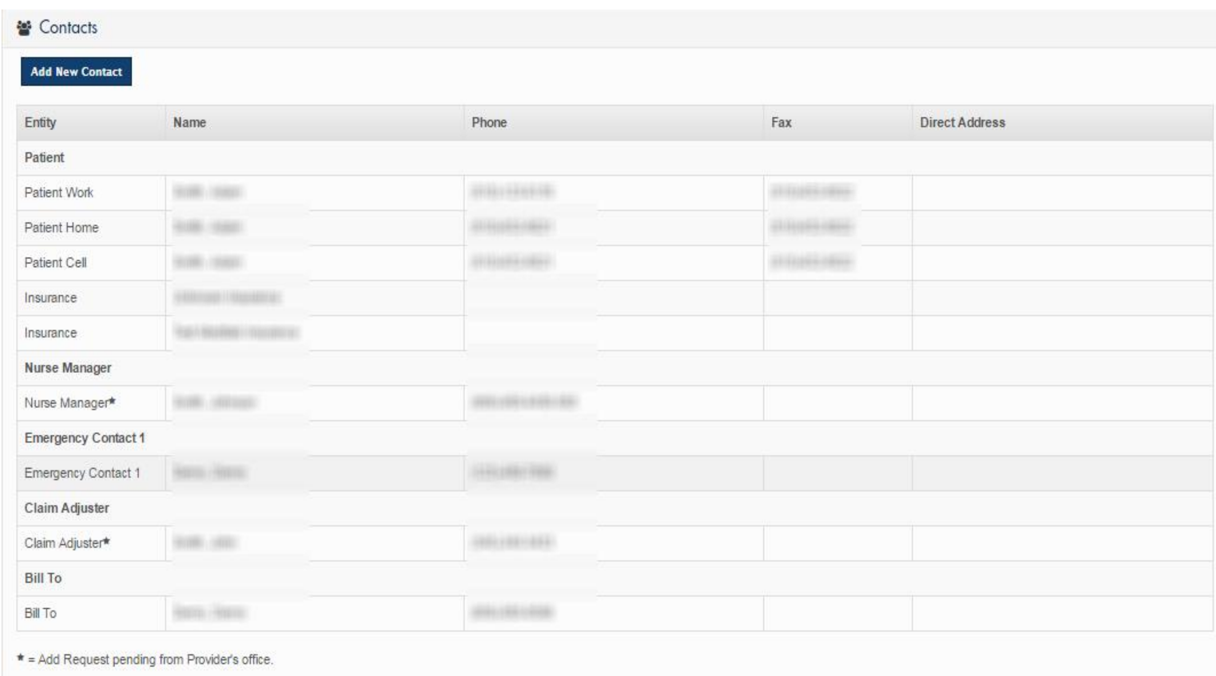


Figure 128 The **Contacts** pane

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.

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

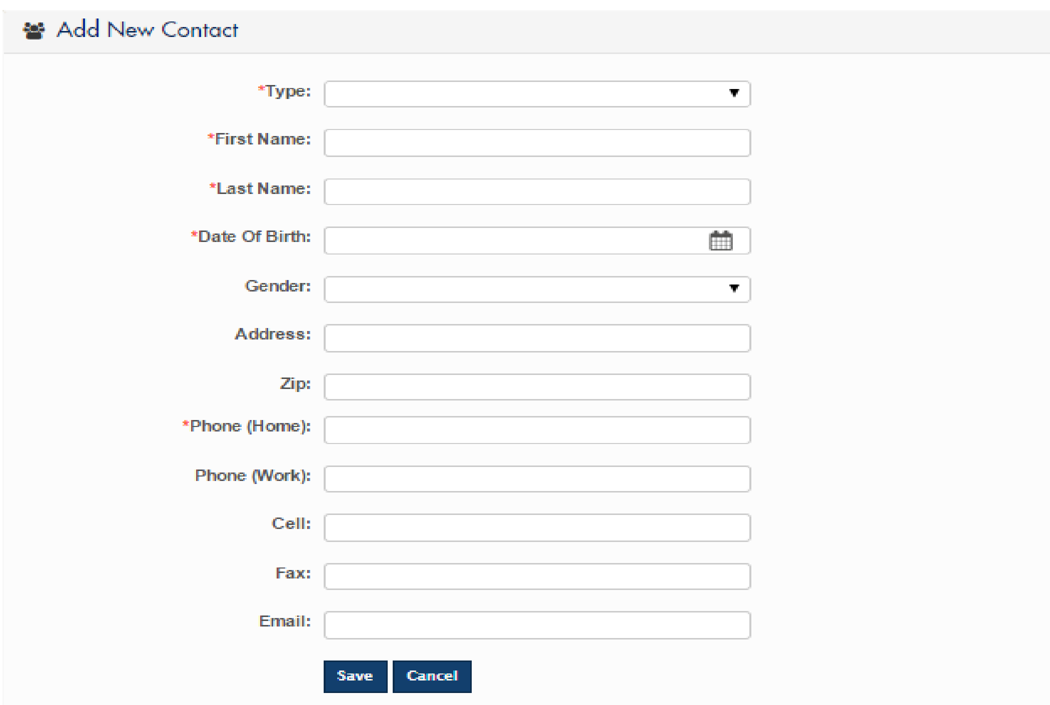


Figure 129 In **Add New Contact** page, enter the applicable contact information, and then click **Save** to add a new contact.

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.

Figure 130 To view your photos, click either **Patient Photos** or **Pending Photos** in **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**.

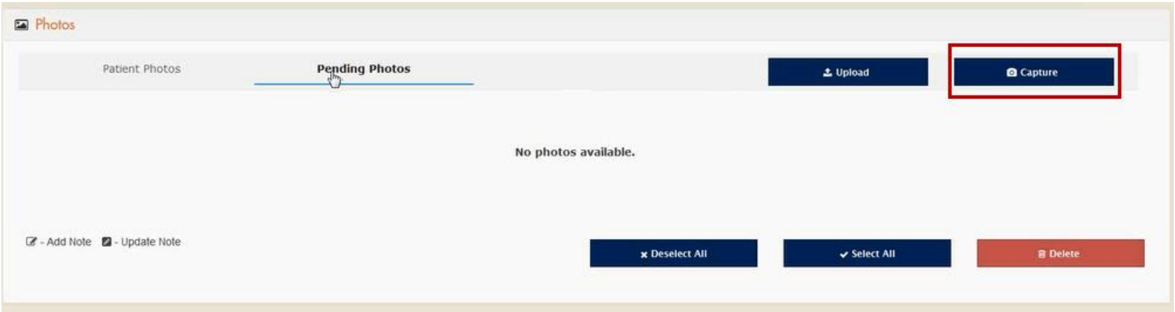


Figure 131 In the **Photos** pane, click **Capture** to open your web camera.

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

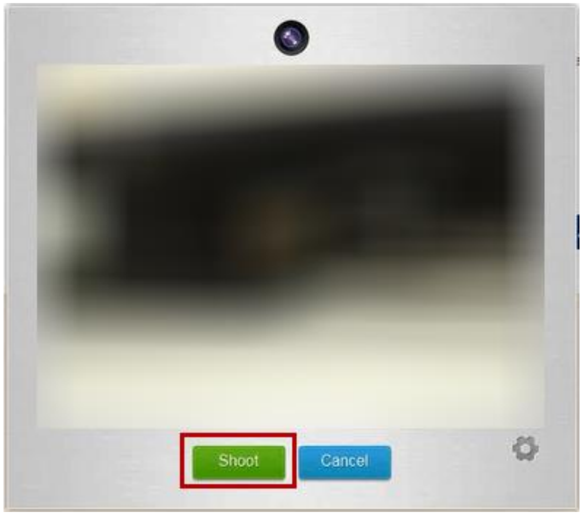


Figure 132 Click **Shoot** to capture the image.

4. Do either of the following:

- Click **Upload** to upload the captured image.
- Click **Back** to discard the captured image, and then capture a new one.

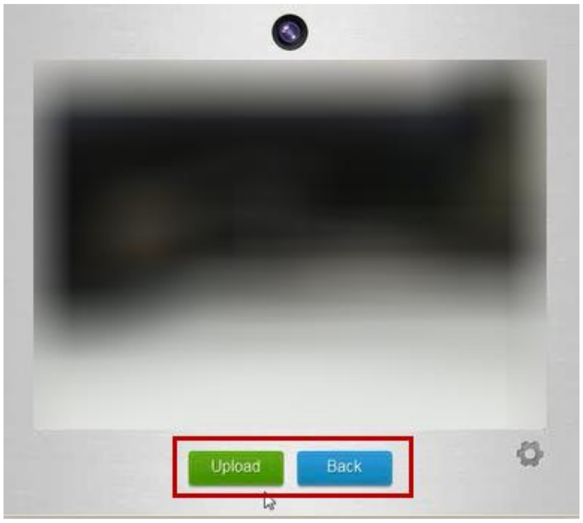


Figure 133 You can click **Upload** to upload the captured image, or click **Back** to discard the captured image, and then capture a new one.

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 to add a note for your uploaded photo.
3. In **Add Note**, type your note, and then click **Save**.

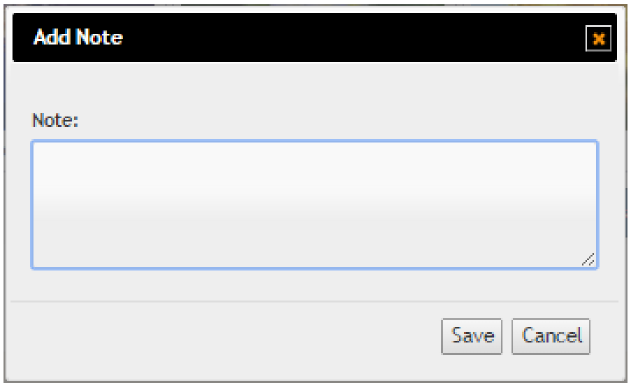


Figure 134 In **Add Note**, enter your note, and then click **Save**.

Note:

The add note symbol changes to the view note symbol if the photo has a note. Click the view note symbol 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

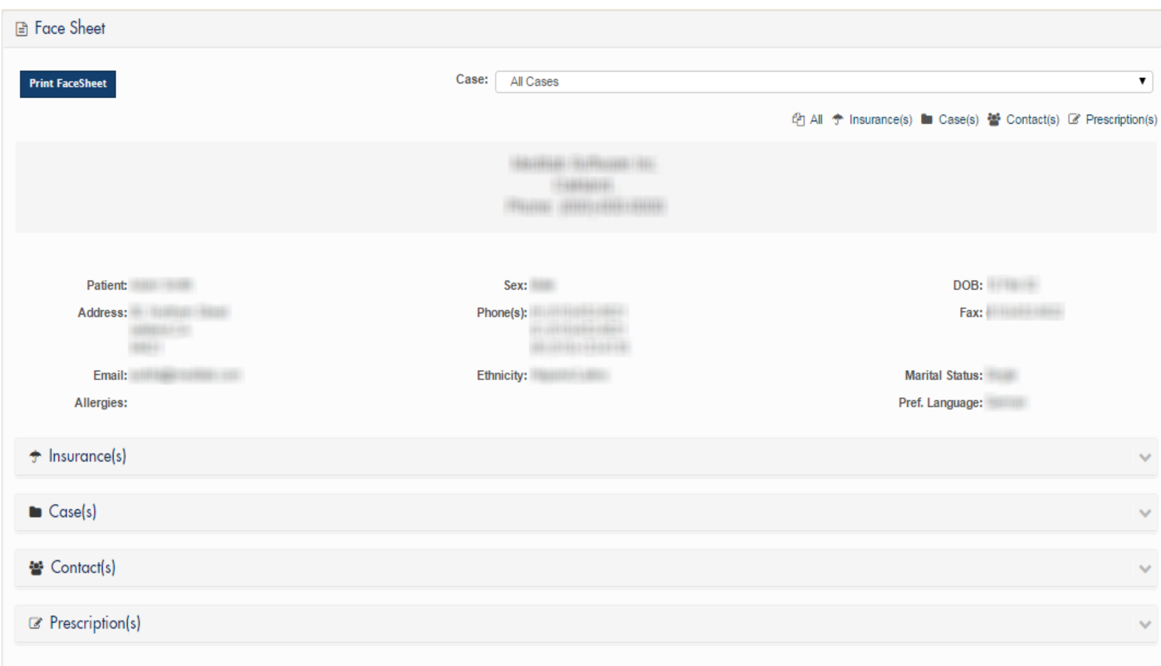


Figure 135 The **Face Sheet** pane

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 .

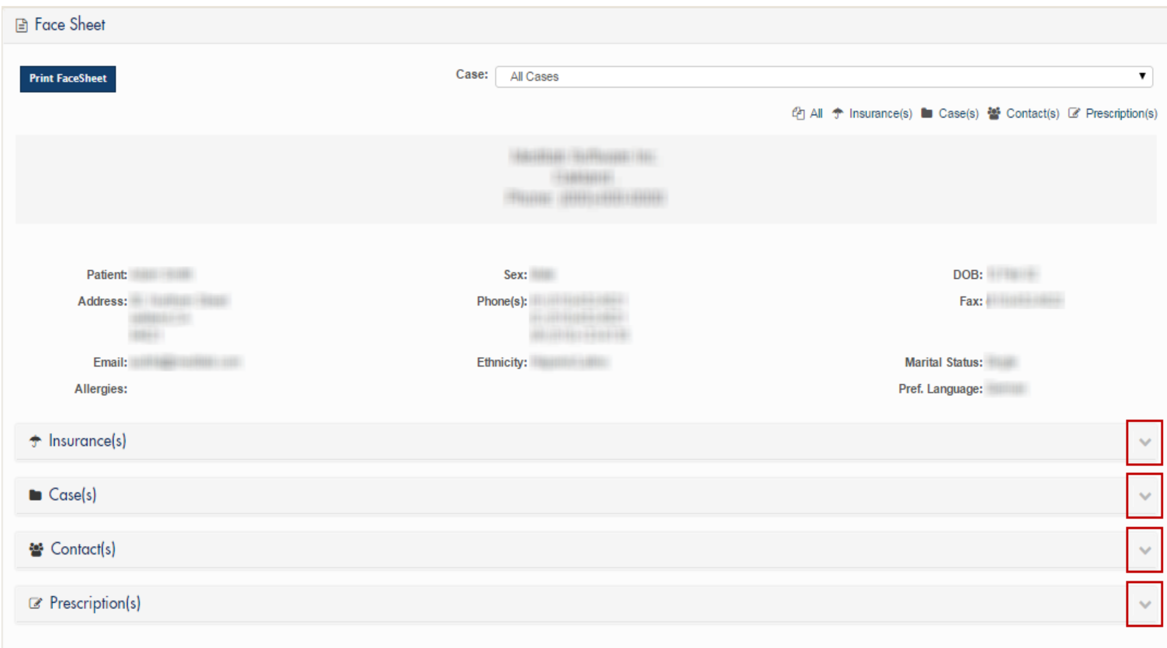


Figure 136 Click the expand symbol to maximize the section.

- To collapse an expanded section in **Face Sheet**, click the collapse symbol .

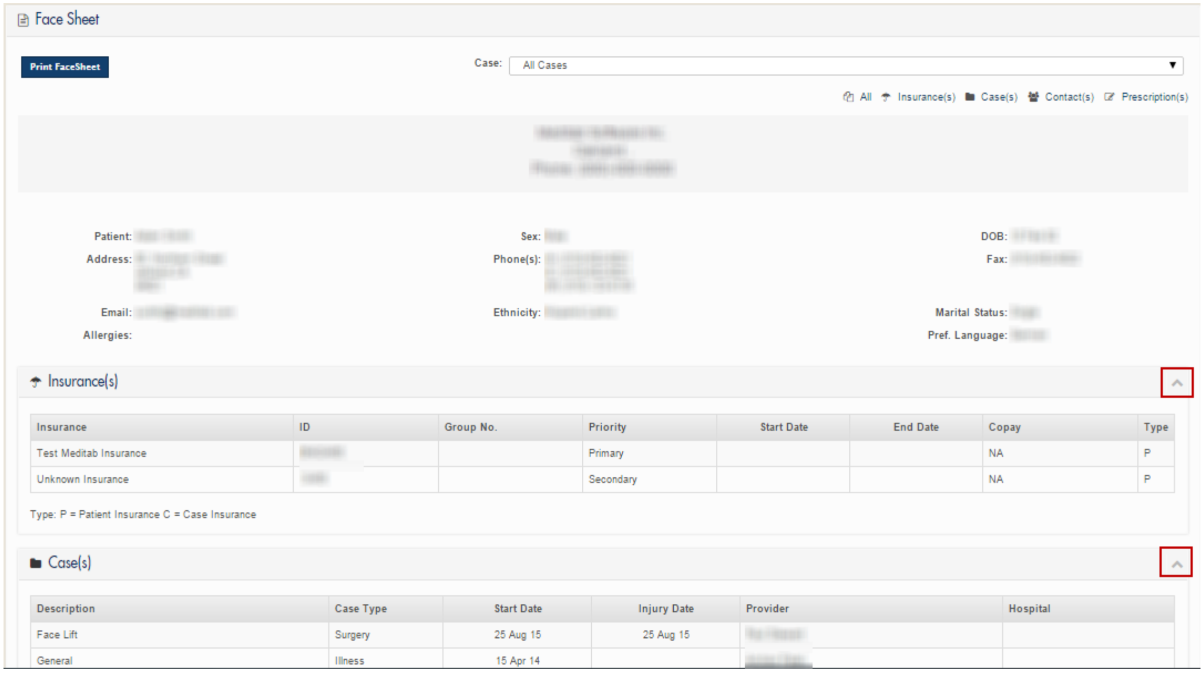


Figure 137 Click the collapse symbol to collapse the section.

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.

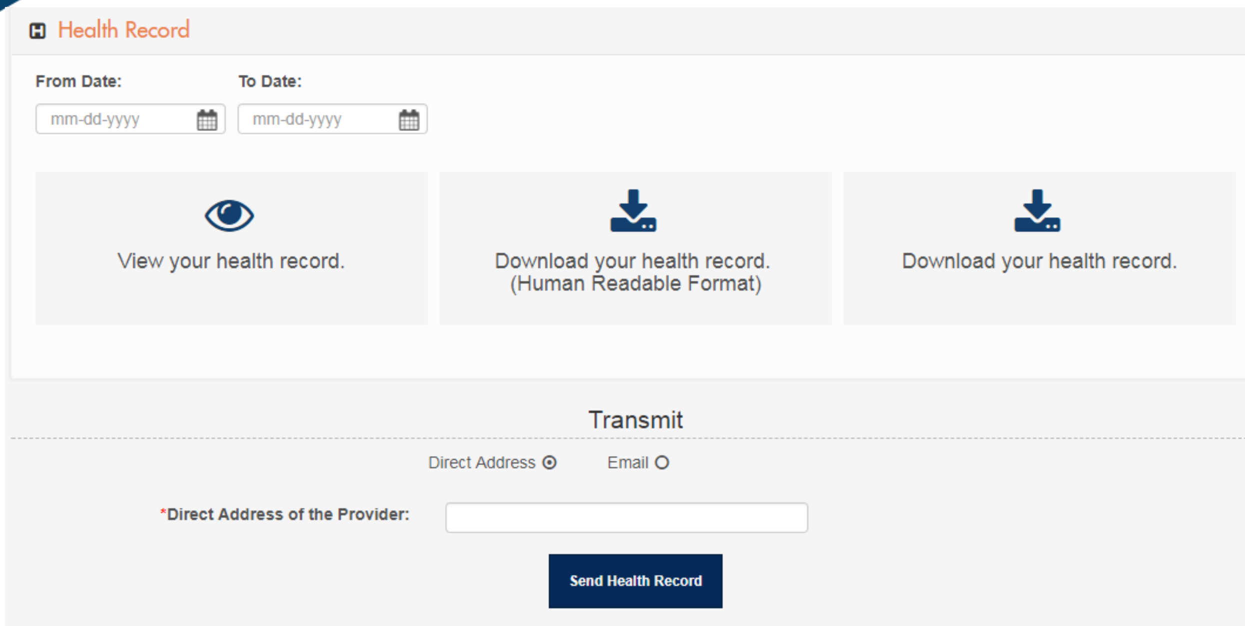


Figure 138 When you click **BLUE BUTTON DOWNLOAD HEALTH RECORD** in the IMS CarePortal menu bar, the system opens the **Health Record** pane.

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.

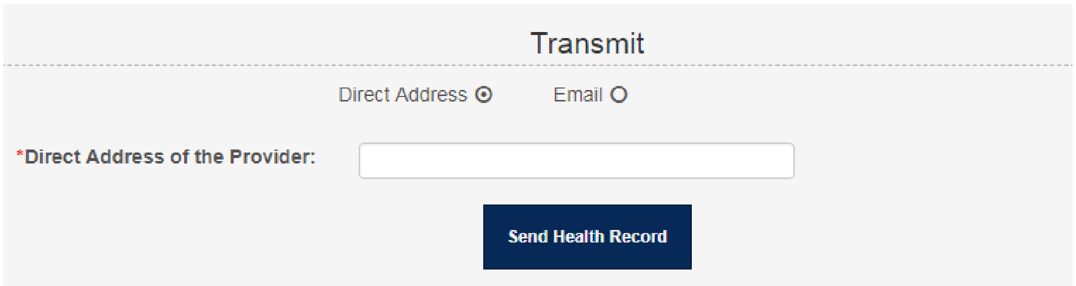


Figure 139 The **Transmit** section of the **Health Record** pane

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.

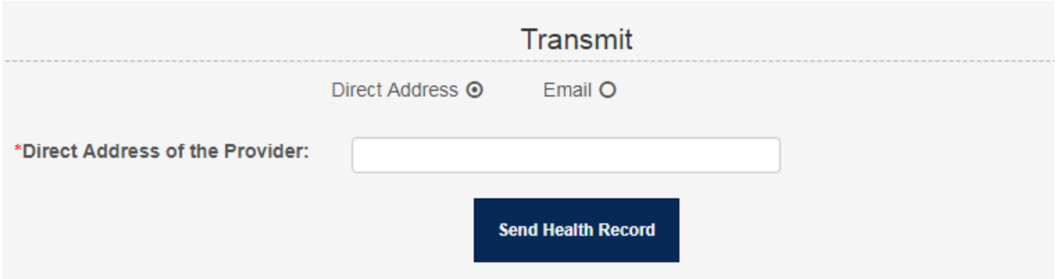


Figure 140 The option that appears when you select **Direct Address** in the **Transmit** section

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

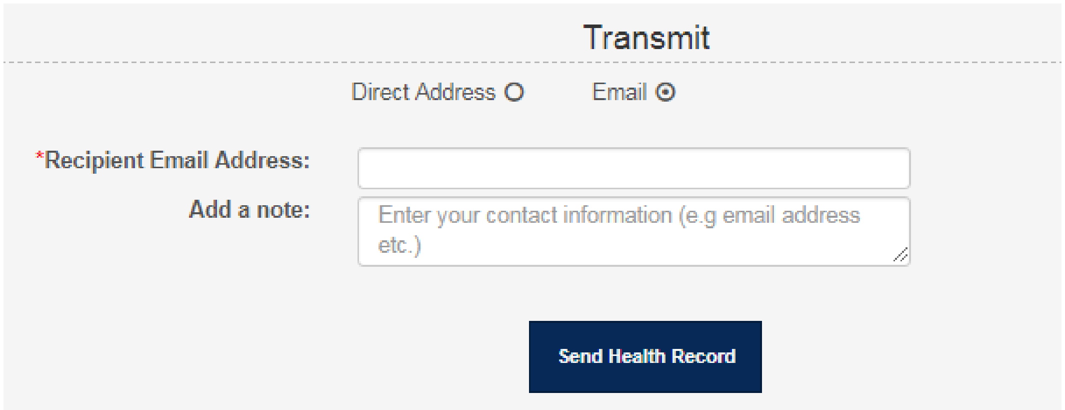


Figure 141 The options that appear when you select **Email** in the **Transmit** section

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

3. Click **Send Health Record**.