



# Nextech

MyPatientVisit Patient Portal User Guide  
for IntellectPro

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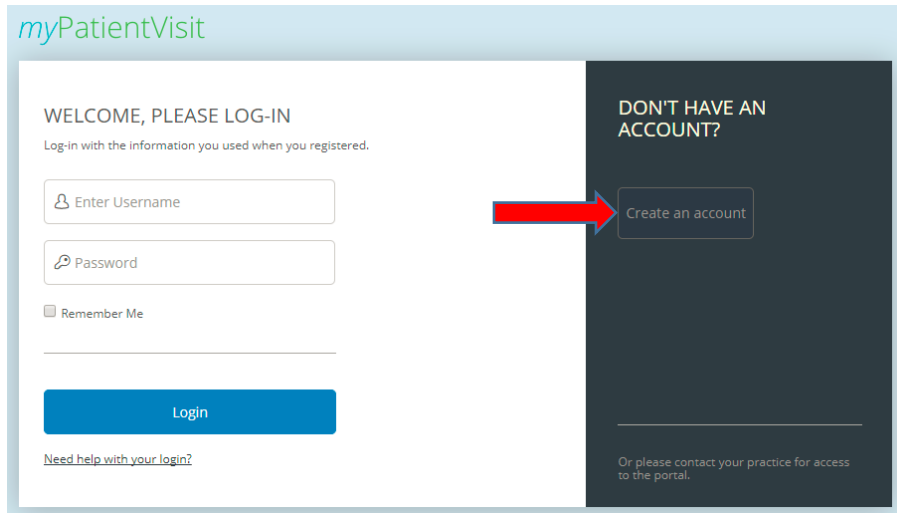
## MyPatientVisit Patient Portal User Guide for IntellectPro

As part of the 2015 Edition Health Information Technology Certification Criteria, IntellectPro was certified on a new patient portal, MyPatientVisit. This user guide will walk the patient through registering, viewing and sending documents and sending messages from their portal.

### Patient Setup and Login to the Patient Portal

#### Patient Registration

The first time a patient goes to MyPatientVisit, they will need to create an account using the information on the document provided from the provider's practice.

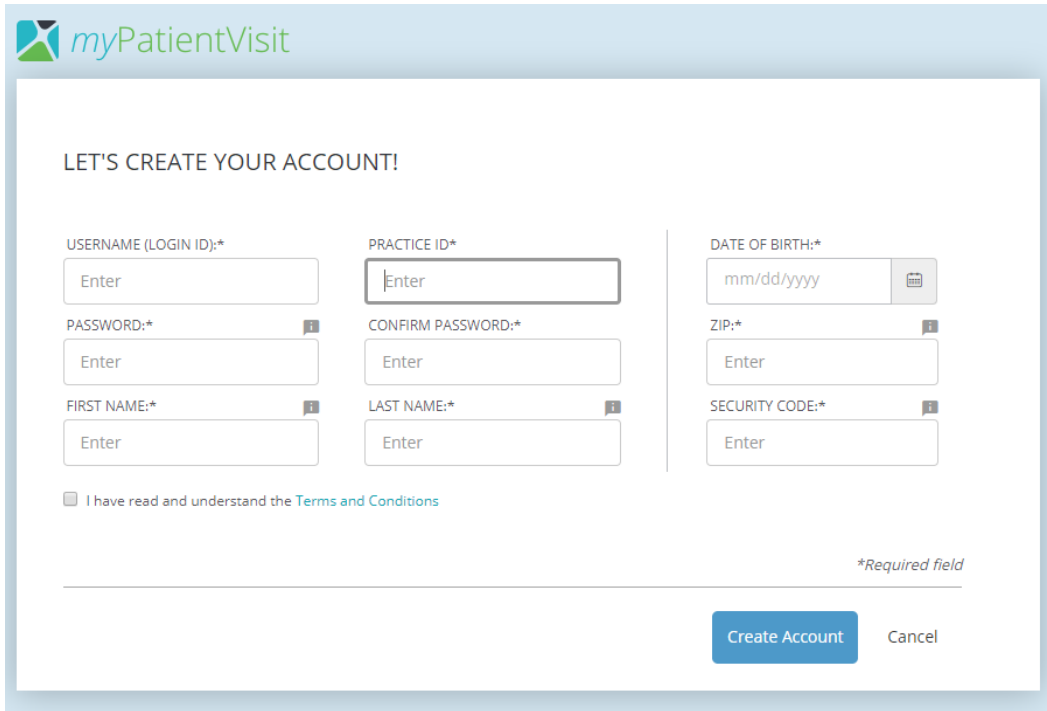


On the screen below, the patient will need to enter a Username using either an email address or a username of their choosing. The password must be at least 8 characters and contain three of the four password requirements:

- At least 1 uppercase character (A through Z)
- At least 1 lowercase character (a through z)
- At least 1 numeric digit (0-9)
- At least 1 special character (~!@#%&\*;\*;\*;+\_)


The patient will enter their first and last name, date of birth, zip code along with the practice ID and security code, which is listed on the document provided from the provider's practice. The patient can click on the [Terms and Conditions](#) link to review these before clicking the checkbox to agree to them. Then select the "Create Account" button.

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The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'LET'S CREATE YOUR ACCOUNT!' is centered. The form is organized into three columns. The first column contains 'USERNAME (LOGIN ID):\*', 'PASSWORD:\*', and 'FIRST NAME:\*'. The second column contains 'PRACTICE ID\*', 'CONFIRM PASSWORD:\*', and 'LAST NAME:\*'. The third column contains 'DATE OF BIRTH:\*', 'ZIP:\*', and 'SECURITY CODE:\*'. Each field has an 'Enter' placeholder and a small red asterisk icon. The 'DATE OF BIRTH' field includes a calendar icon. Below the fields is a checkbox labeled 'I have read and understand the Terms and Conditions'. At the bottom right, there is a blue 'Create Account' button and a 'Cancel' link. A horizontal line separates the checkbox from the buttons. The text '\*Required field' is located to the right of this line.

LET'S CREATE YOUR ACCOUNT!

USERNAME (LOGIN ID):\*  PRACTICE ID\*  DATE OF BIRTH:\*  

PASSWORD:\*  CONFIRM PASSWORD:\*  ZIP:\*

FIRST NAME:\*  LAST NAME:\*  SECURITY CODE:\*

I have read and understand the [Terms and Conditions](#)

*\*Required field*

### Security Questions

Patients will next be asked to select 3 security questions to be used if they forgot their password. Select a security question from each of the drop downs, then type the answer in the box labeled "Provide your answer".

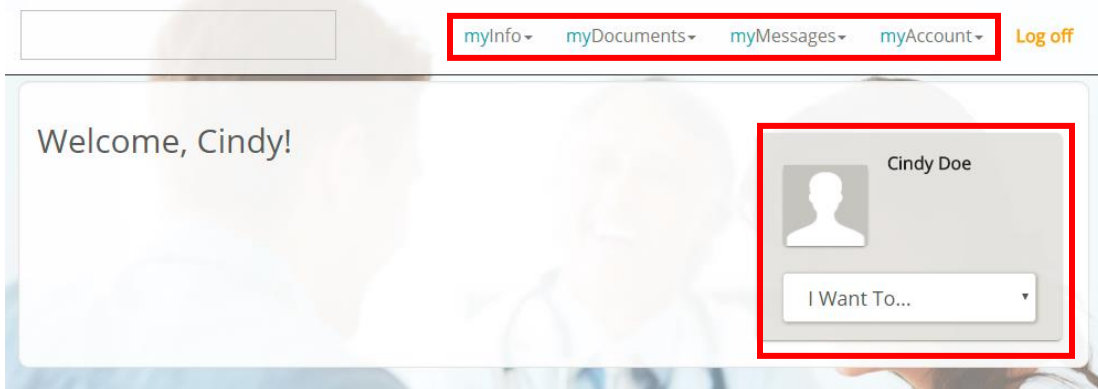
The screenshot shows a web page with the 'myPatientVisit' logo in the top left. The main heading is 'JUST IN CASE YOU FORGET YOUR PASSWORD'. Below this is a paragraph: 'Please select and answer three security questions from the list below. Your answers will be used to reset your password just in case you happen to forget it.' The form contains three identical sections, each labeled 'Question 1:', 'Question 2:', and 'Question 3:'. Each section has a dropdown menu with the text 'Select a security question' and a small downward arrow on the right. Below each dropdown is a text input field with the placeholder text 'Provide your answer'. At the bottom right of the form area is a blue button labeled 'Continue'.

## Patient Portal Dashboard

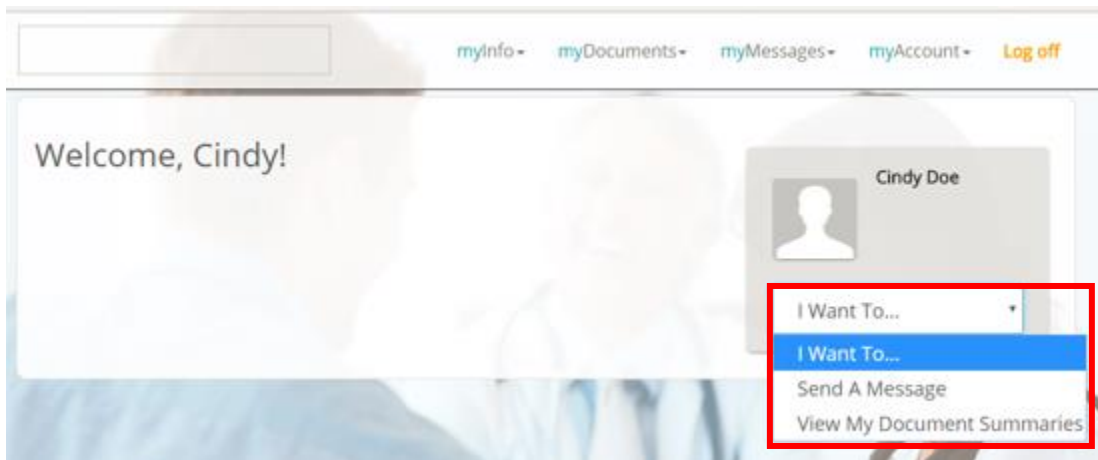
### Patient's Dashboard

Patients will be taken to their dashboard page where they will see patient option dropdowns (myInfo, myDocuments, myMessages, myAccount) and I Want To.

## MyPatientVisit Patient Portal User Guide for IntellectPro



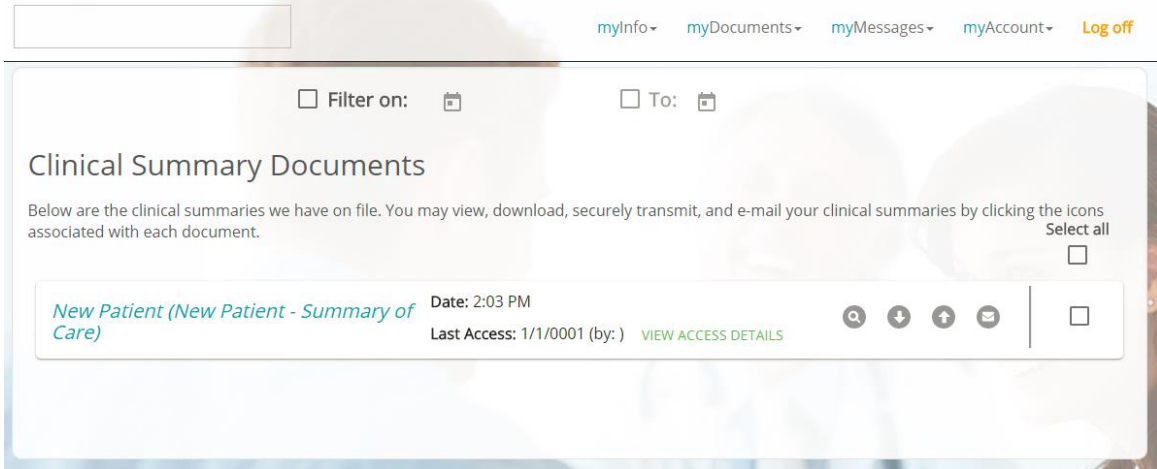
The dropdown for “I Want To...” has quick links to the most common actions: Send a Message and View My Document Summaries.



### Patient Documents in myDocuments View

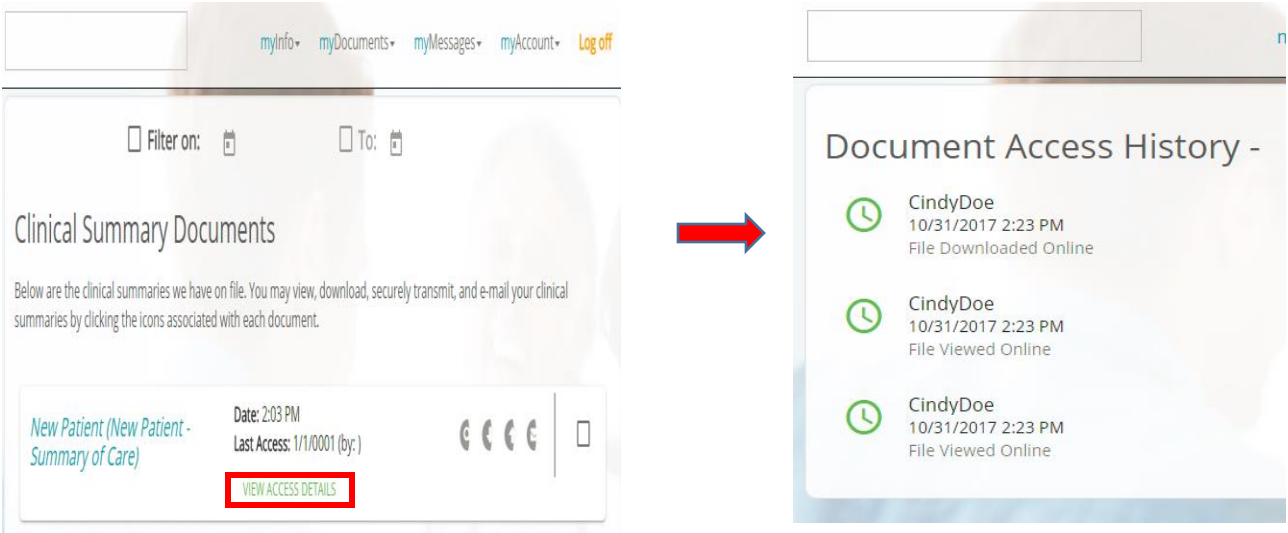
Clicking on myDocuments then selecting “Document Summary” will show a list of the documents the provider has shared with the patient. Patients can view, download, or share these documents.

## MyPatientVisit Patient Portal User Guide for IntellectPro



### Patient Documents View Access Details

Patients can view the document access details by clicking on the “View Access Details” hyperlink.



### E-Mail Clinical Summary & Patient Documents through the Patient Portal

#### Secure Email

As part of the View, Download and Transmit (VDT) requirement, patients can securely send their Summary of Care (CCD) document to another provider of their choice by clicking on the up arrow (transmit securely) next to the document.

## MyPatientVisit Patient Portal User Guide for IntellectPro

The screenshot shows the top navigation bar with links for myInfo, myDocuments, myMessages, myAccount, and Log off. Below the navigation bar, there are filter options for 'Filter on:' and 'To:'. The main heading is 'Clinical Summary Documents'. Below the heading, there is a paragraph explaining that clinical summaries are available for viewing, downloading, secure transmission, and emailing. A 'Select all' checkbox is present. A document entry is shown with the title 'New Patient (New Patient - Summary of Care)', a date of '2:03 PM', and a last access date of '1/1/0001 (by: )'. A 'VIEW ACCESS DETAILS' link is provided. To the right of the document entry are icons for search, download, transmit (highlighted with a red box), and email.

Enter the provider's secure email address in To, a Subject, and a message to the provider in the Body.

The screenshot shows the 'Transmit Documents Securely' form. The form has a heading 'Transmit Documents Securely' and a paragraph explaining that users can enter multiple email addresses by pressing enter. Two document entries are listed: 'CCDA\_1.xml' and 'CCDA\_1.pdf'. Below the document entries are three input fields: 'To:', 'Subject: \*', and 'Body: \*'. The 'Subject' field has a character count of '0 / 255' and the 'Body' field has a character count of '0 / 4000'. At the bottom right of the form are 'SEND' and 'CANCEL' buttons.

### Unencrypted Email

As part of the View, Download and Transmit (VDT) requirement, patients are now able to view and email their Summary of Care (CCD) and Patient documents published files through an unencrypted email rather than secure direct message to a 3rd party of their choice.



## MyPatientVisit Patient Portal User Guide for IntellectPro

The screenshot shows the top navigation bar with links for myInfo, myDocuments, myMessages, myAccount, and Log off. Below the navigation bar, there are filters for 'Filter on:' and 'To:'. The main heading is 'Clinical Summary Documents'. Below the heading, there is a text block: 'Below are the clinical summaries we have on file. You may view, download, securely transmit, and e-mail your clinical summaries by clicking the icons associated with each document.' To the right of this text is a 'Select all' checkbox. Below the text, there is a document entry for 'New Patient (New Patient - Summary of Care)'. The entry includes the date 'Date: 2:03 PM' and 'Last Access: 1/1/0001 (by: )'. To the right of the document entry are icons for search, download, upload, and email. The email icon is highlighted with a red box. To the right of the email icon is another checkbox.

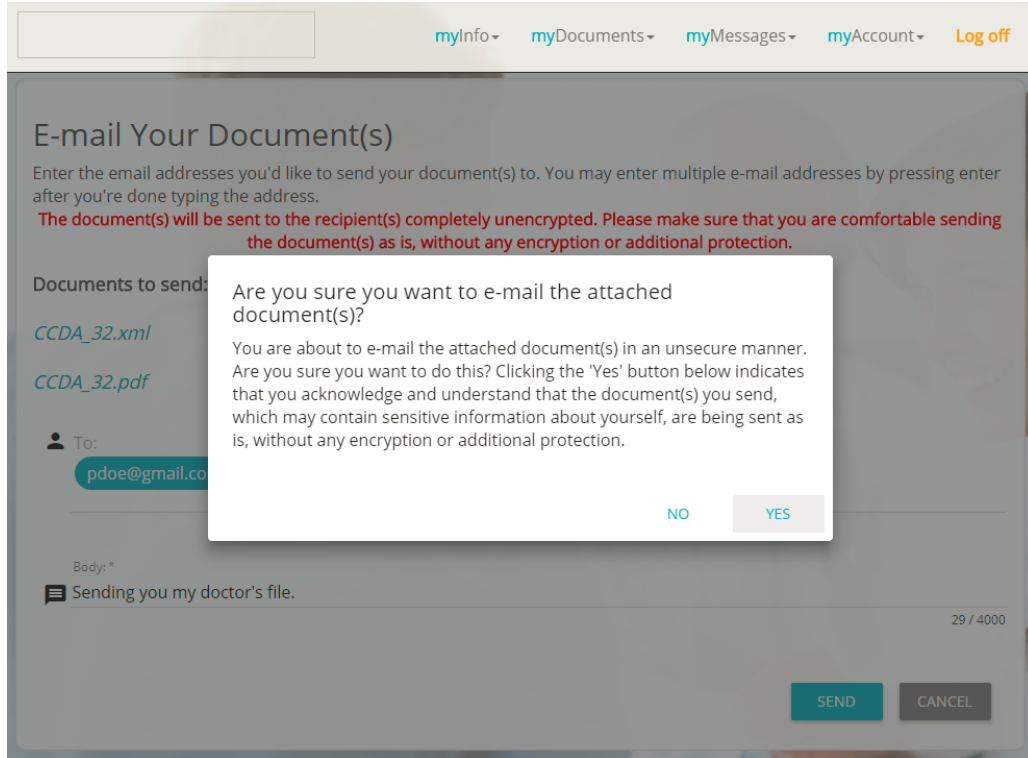
### Unencrypted Email Warning Messages

A warning message is visibly displayed on the page to ensure the patient is aware that this is an unsecure channel.

The screenshot shows the top navigation bar with links for myInfo, myDocuments, myMessages, myAccount, and Log off. Below the navigation bar, the main heading is 'E-mail Your Document(s)'. Below the heading, there is a text block: 'Enter the email addresses you'd like to send your document(s) to. You may enter multiple e-mail addresses by pressing enter after you're done typing the address.' Below this text is a warning message in red: 'The document(s) will be sent to the recipient(s) completely unencrypted. Please make sure that you are comfortable sending the document(s) as is, without any encryption or additional protection.' Below the warning message, there is a section for 'Documents to send:' with two documents listed: 'CCDA\_32.xml' and 'CCDA\_32.pdf'. Below the documents, there is a 'To:' field with a person icon and a text input area. Below the 'To:' field, there is a 'Body: \*' field with a text input area and a character count '0 / 4000'. At the bottom right, there are two buttons: 'SEND' and 'CANCEL'.

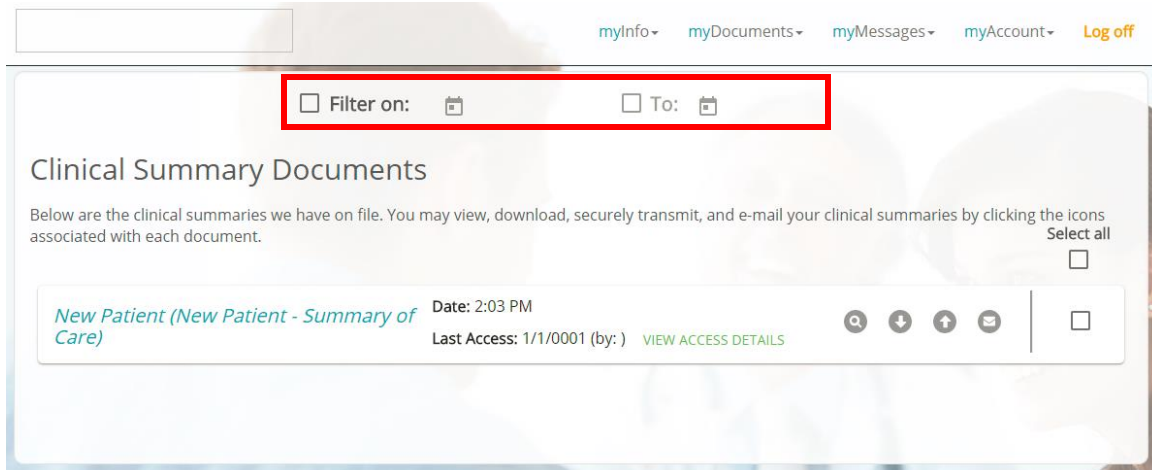
When the patient clicks the 'Send' button to send the email, a warning pop-up window is displayed and the user would have to manually click the "Yes" or "No" button to continue or cancel action.

## MyPatientVisit Patient Portal User Guide for IntellectPro



### Ability to Filter on Summary of Care Documents

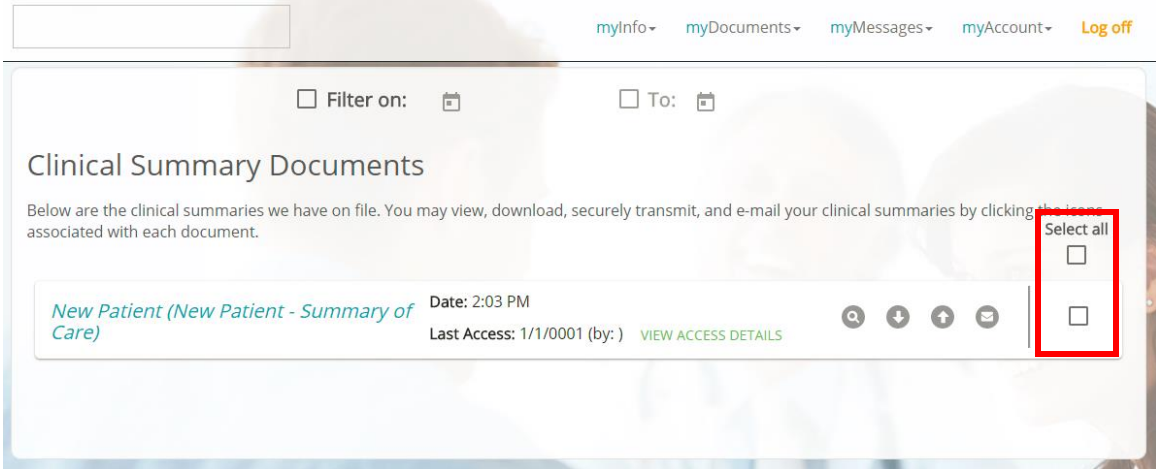
A patient can now filter on specific date or date range for their summary of care documents or patient documents that was published to them on the Patient Portal.



### Ability to Multi - Select Documents to View, Download, Transmit and email

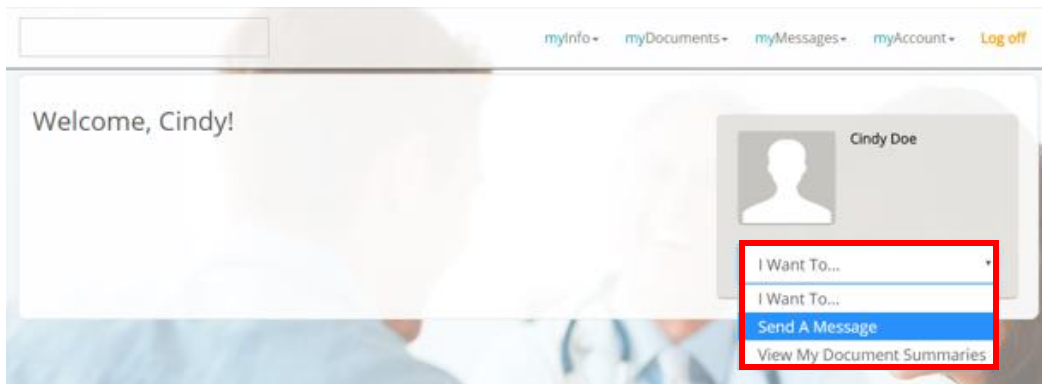
A patient can select all documents published on the patient portal to view, download, securely transmit or email.

## MyPatientVisit Patient Portal User Guide for IntellectPro



### Send a Message

Patients can send a secure message to any of their providers. From the dashboard, click on “I Want To ...” dropdown and select “Send A Message”.



The patient will see the “Send and review messages” screen. Select the Provider to send a secure message to.

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myInfo myDocuments myMessages myAccount Log off

### Send and review messages

This feature (email) is a convenient way to send electronic messages to your doctor's office, as well as various other departments, depending on your needs. For example, you have the ability to: - Request a referral - Request medication renewals - Compliment a staff member or office - Lodge a complaint - Ask a billing question Please observe the following guidelines when using electronic communication: - This email is not intended for Medical diagnosis or treatment, there may be a delay in response. - Do not use electronic communication for urgent matters, such as loss of vision or acute eye pain. Call our office if you are experiencing any eye problems. Documentation of your message will become part of your medical record. - If you are unable to describe your condition in the space provided, please call our office. - Your message may be read by others who are involved in your care besides your doctor. If you do not receive a timely reply, please contact our office. - If you leave this screen without sending your message, your message will NOT be saved.

*In an emergency, call 911 or your local emergency number immediately. This is not an emergency service.*

**Provider:** Davis, Albert  
Date: 01/01/0001 12:00 AM

The patient can read secure messages from that provider or send a secure message to that provider by typing the message then selecting the “Send” button.

myInfo myDocuments myMessages myAccount Log off

**Provider: Davis, Albert**

Office Office  
07/26/2017 9:46 AM  
Hello Alice, come in early on Friday please.

Me  
07/26/2017 9:47 AM  
Sounds good. I'll be there.

Reply to thread:

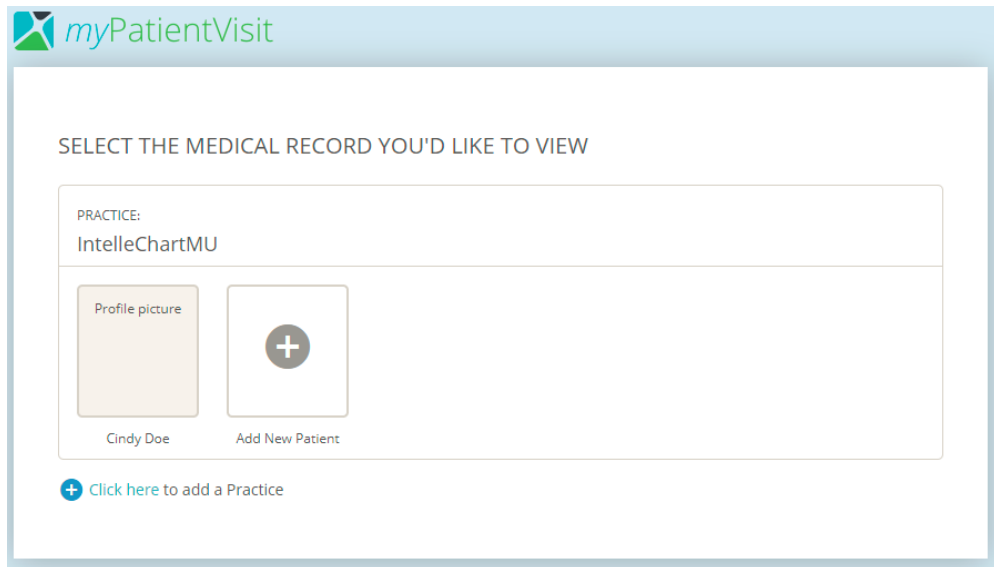
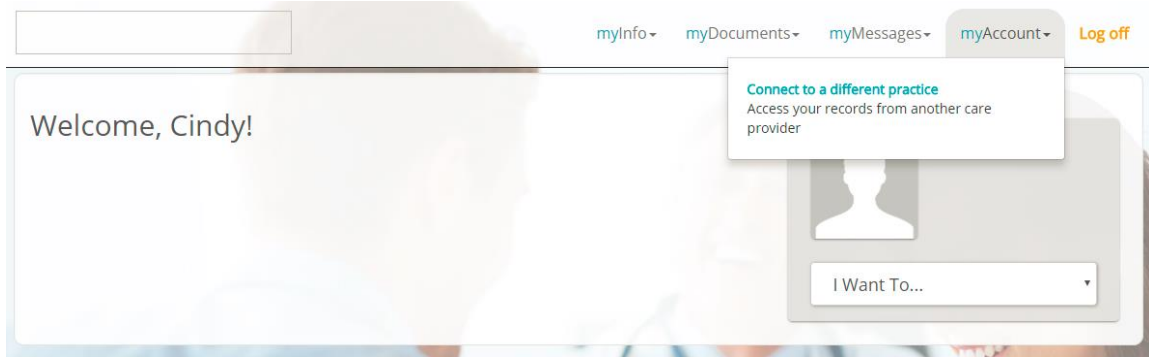
0 / 4000

SEND CANCEL

### Connecting to another practice

Patients can add other practices, who also use MyPatientVisit, to their account, or add additional patients, such as children, spouse or parent. This is done by selecting myAccount then “Connect to a different practice”. To connect to a different practice, the patient will need the information from their provider showing the security code and practice ID.

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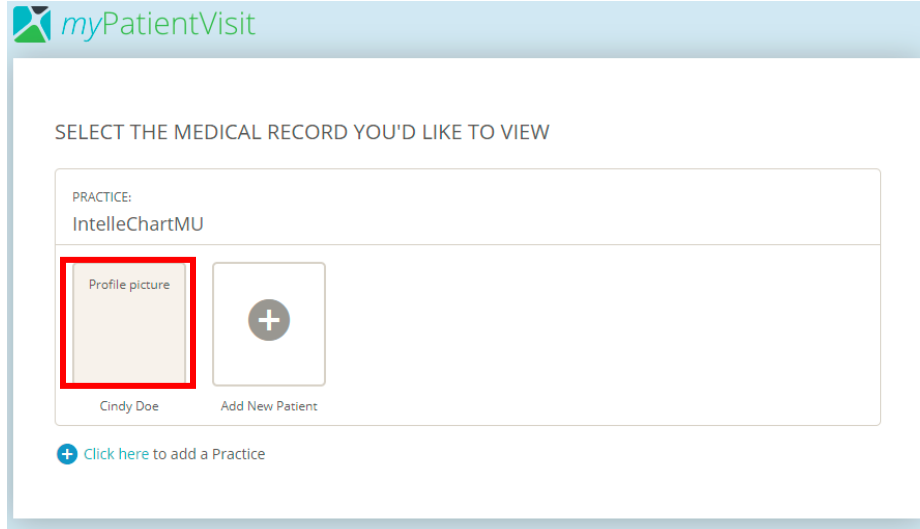


### Subsequent Patient Login

#### Patient Login

When the patient logs in subsequently after the initial registration, they will need to click on the box above their name to access their documents.

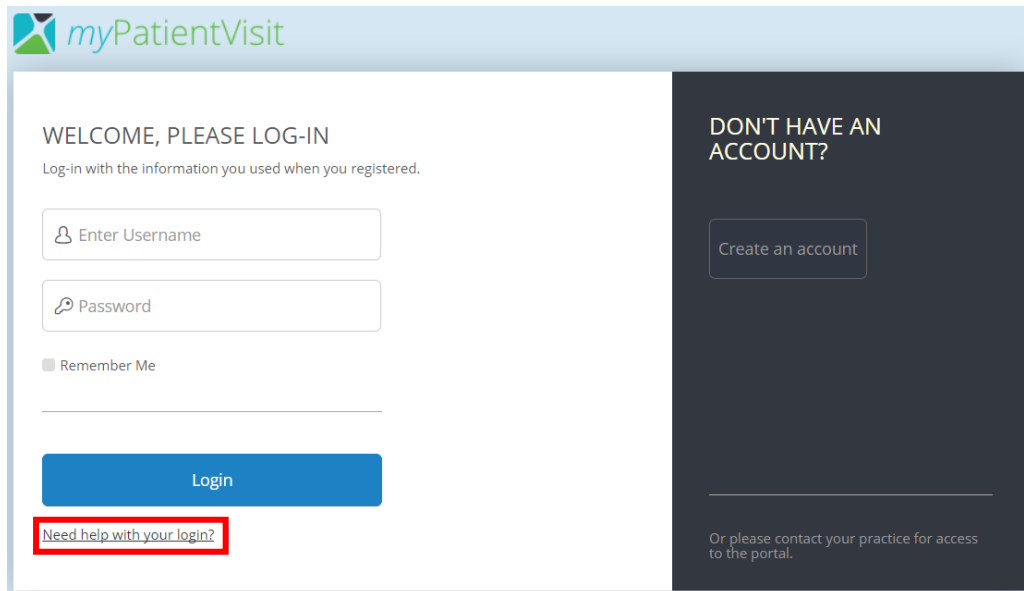
## MyPatientVisit Patient Portal User Guide for IntelChartPro



### Forgot Login Credentials

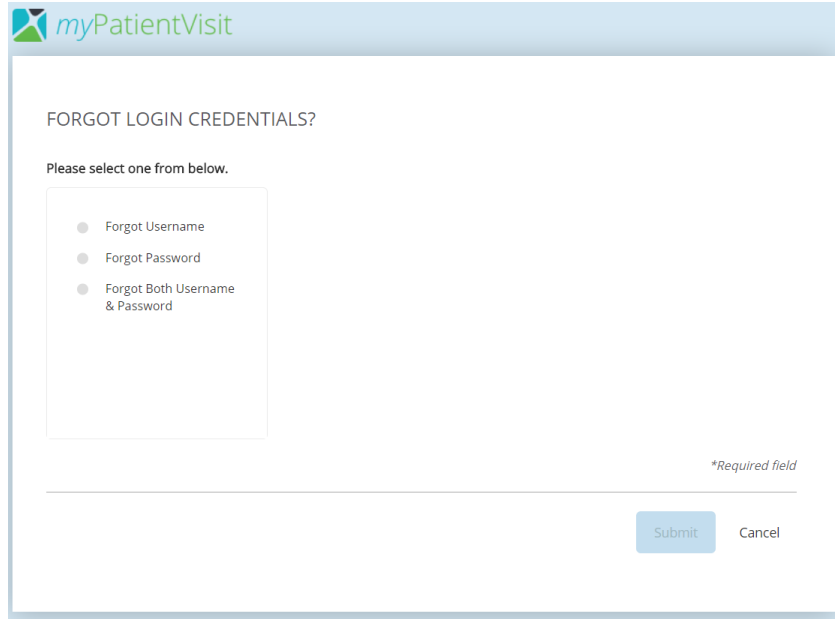
#### Patient Forgot Username or Password

When a patient forgets their username or password, they can get assistance by clicking on “Need help with your login?” on the login screen.



The patient will be able to select Username, Password or both to recover their credentials.

## MyPatientVisit Patient Portal User Guide for IntellectPro



myPatientVisit

FORGOT LOGIN CREDENTIALS?

Please select one from below.

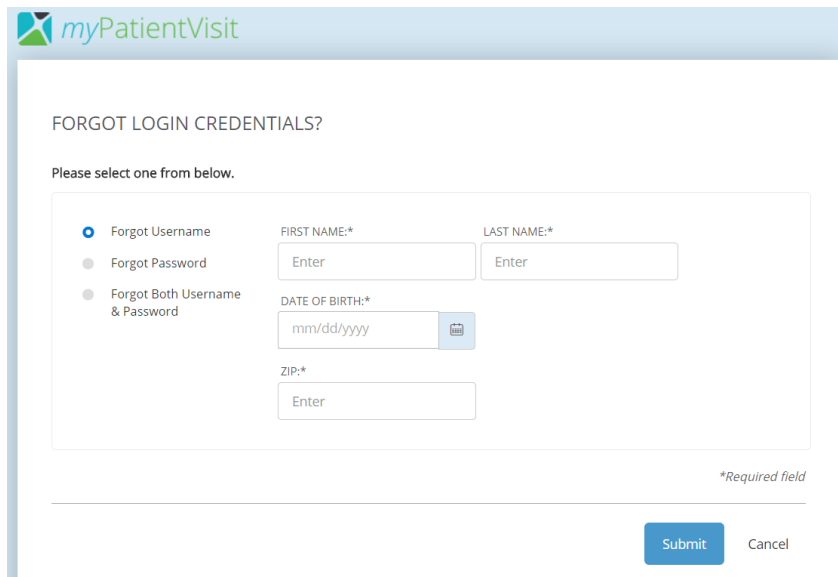
- Forgot Username
- Forgot Password
- Forgot Both Username & Password

*\*Required field*

Submit Cancel

### Forgot Username

When the patient selects “Forgot Username”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.



myPatientVisit


FORGOT LOGIN CREDENTIALS?

Please select one from below.

- Forgot Username
- Forgot Password
- Forgot Both Username & Password

FIRST NAME:\*

LAST NAME:\*

DATE OF BIRTH:\*  

ZIP:\*

*\*Required field*

Submit Cancel

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).

**RECOVER YOUR CREDENTIALS**

In order to recover your credentials, please answer the following security questions you answered during the registration process.

**Question 1:**

*In which state were you born?*

Provide your answer

**Question 2:**

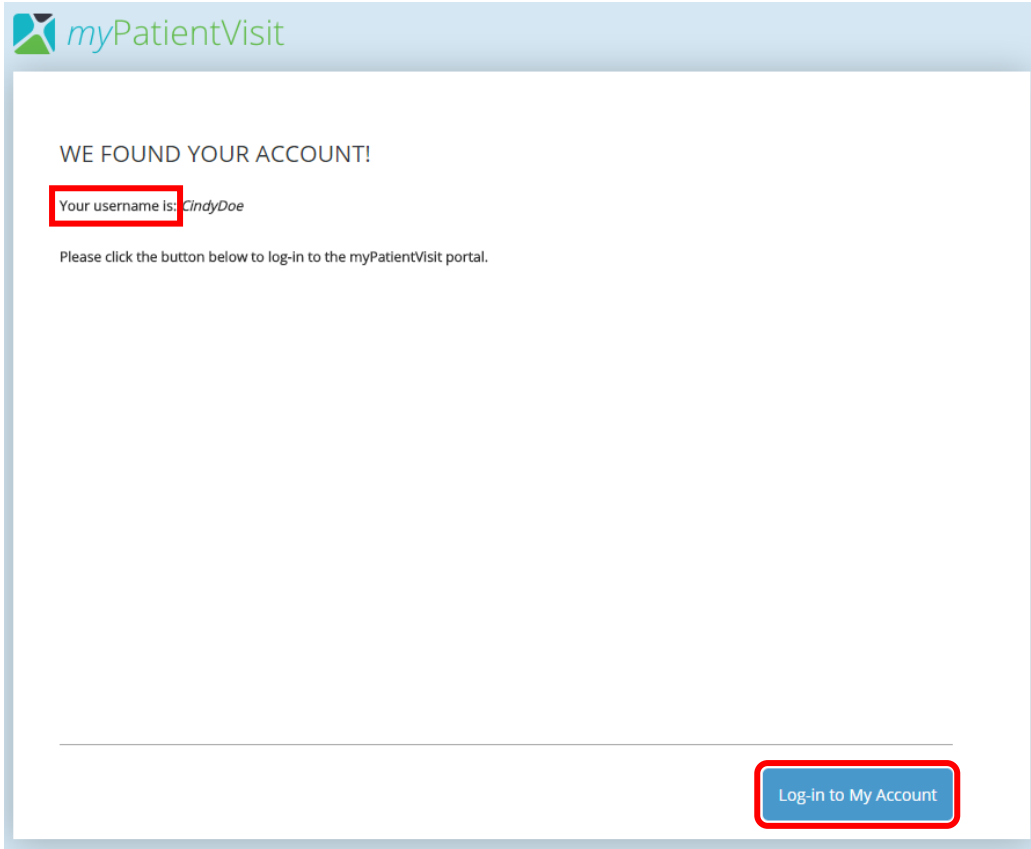
*In which city were you born?*

Provide your answer

Continue

If the correct information is entered, the patient’s username will be displayed. The patient will then click on “Log-in to My Account”.





The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

### Forgot Password

When the patient selects "Forgot Password", they will be asked to enter their First Name, Last Name, Username, Date of Birth and Zip they used to create their login.

## MyPatientVisit Patient Portal User Guide for IntellectPro

The screenshot shows the 'FORGOT LOGIN CREDENTIALS?' page in the MyPatientVisit portal. At the top left is the MyPatientVisit logo. The main heading is 'FORGOT LOGIN CREDENTIALS?'. Below it, the instruction 'Please select one from below.' is followed by three radio button options: 'Forgot Username', 'Forgot Password' (which is selected), and 'Forgot Both Username & Password'. The 'Forgot Password' option is active, showing two input fields for 'FIRST NAME:\*' and 'LAST NAME:\*', each with 'Enter' as a placeholder. The 'Forgot Both Username & Password' option is inactive, showing four input fields: 'USERNAME (LOGIN ID):\*' with 'Enter', 'DATE OF BIRTH:\*' with 'mm/dd/yyyy' and a calendar icon, and 'ZIP:\*' with 'Enter'. A horizontal line separates the form from the bottom, where there are 'Submit' and 'Cancel' buttons. A note '\*Required field' is located at the bottom right of the form area.

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).

**myPatientVisit**

### RECOVER YOUR CREDENTIALS

In order to recover your credentials, please answer the following security questions you answered during the registration process.

**Question 1:**

*In which state were you born?*

Provide your answer

**Question 2:**

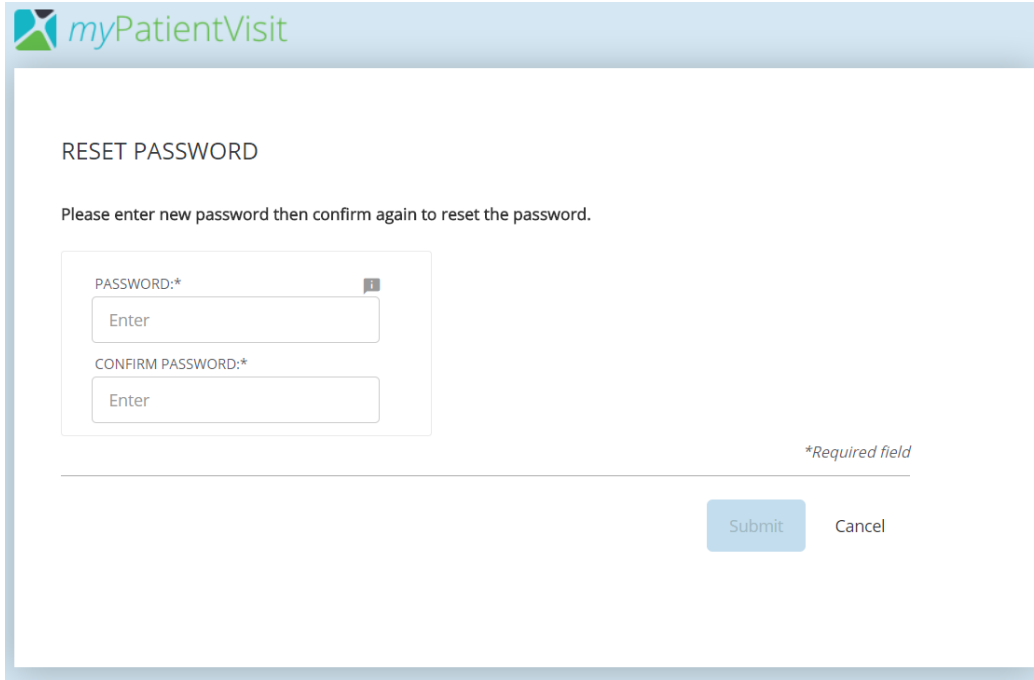
*In which city were you born?*

Provide your answer

Continue

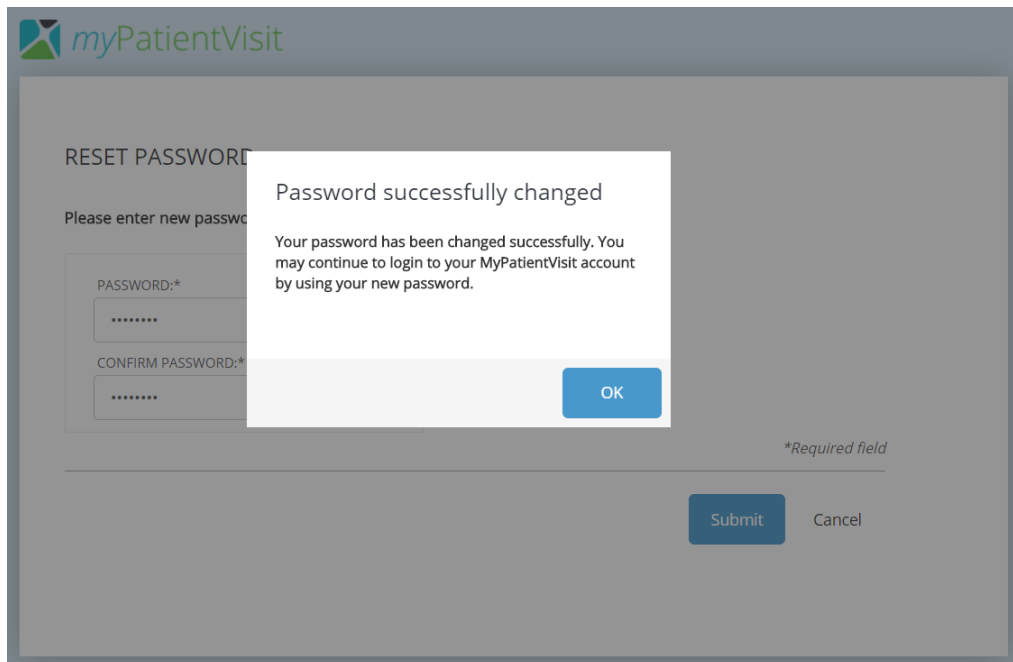
If the correct information is entered, MyPatientVisit will allow the patient to reset their password.

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The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'RESET PASSWORD' is centered. A message reads: 'Please enter new password then confirm again to reset the password.' There are two input fields: 'PASSWORD:\*' and 'CONFIRM PASSWORD:\*', each with an 'Enter' button. A red asterisk icon is next to the first field. At the bottom right, there is a '\*Required field' label and two buttons: 'Submit' and 'Cancel'.

The patient will get confirmation that their password was successfully changed.



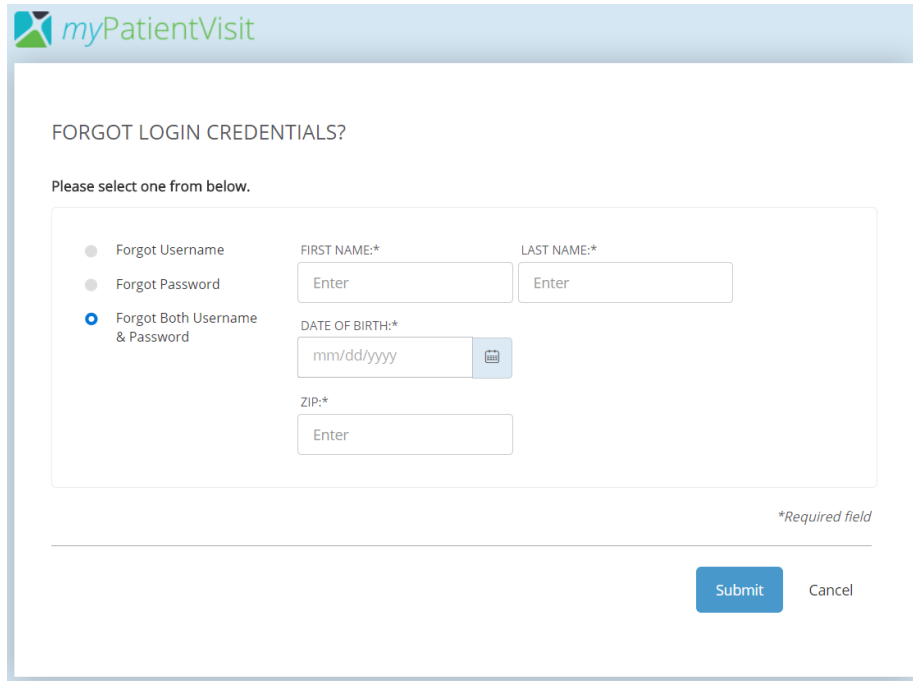
This screenshot shows the same 'RESET PASSWORD' form as above, but with a modal dialog box overlaid in the center. The dialog box has the title 'Password successfully changed' and the text: 'Your password has been changed successfully. You may continue to login to your MyPatientVisit account by using your new password.' There is an 'OK' button at the bottom right of the dialog. The background form is dimmed.

The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

## MyPatientVisit Patient Portal User Guide for IntellectPro

### Forgot Username or Password

When the patient selects “Forgot Both Username & Password”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.



The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'FORGOT LOGIN CREDENTIALS?' is displayed. A sub-heading reads 'Please select one from below.' There are three radio button options: 'Forgot Username', 'Forgot Password', and 'Forgot Both Username & Password'. The third option is selected. To the right of these options are four input fields: 'FIRST NAME:\*' and 'LAST NAME:\*' (both with 'Enter' text), 'DATE OF BIRTH:\*' (with a date picker icon and 'mm/dd/yyyy' text), and 'ZIP:\*' (with 'Enter' text). A horizontal line separates the form from the bottom, where a blue 'Submit' button and a 'Cancel' link are located. A small asterisk note '\*Required field' is positioned to the right of the input fields.

The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).

myPatientVisit

## RECOVER YOUR CREDENTIALS

In order to recover your credentials, please answer the following security questions you answered during the registration process.

Question 1:

*In which state were you born?*

Provide your answer

Question 2:

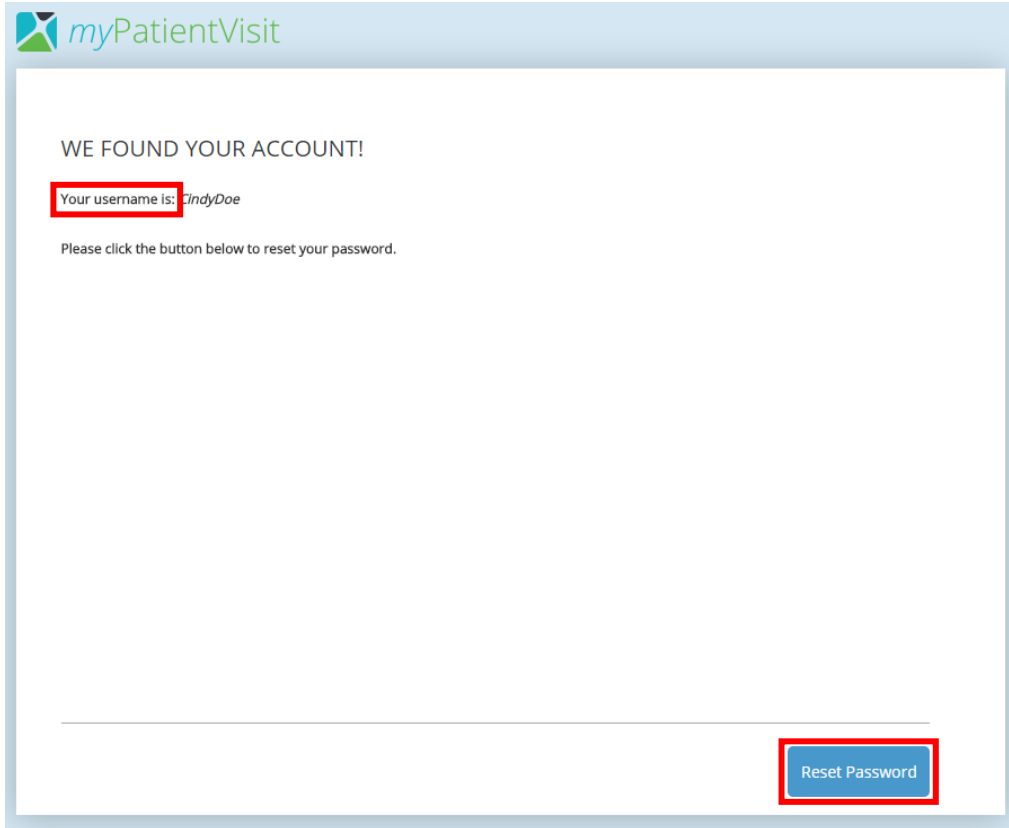
*In which city were you born?*

Provide your answer

Continue

If the correct information is entered, MyPatientVisit will display the patient’s username. The patient will then click on “Reset Password”.

## MyPatientVisit Patient Portal User Guide for IntellectPro



The screenshot shows the MyPatientVisit logo at the top left. Below it, the text "WE FOUND YOUR ACCOUNT!" is displayed. A red box highlights the text "Your username is: CindyDoe". Below this, the instruction "Please click the button below to reset your password." is shown. At the bottom right, a blue button labeled "Reset Password" is highlighted with a red box.

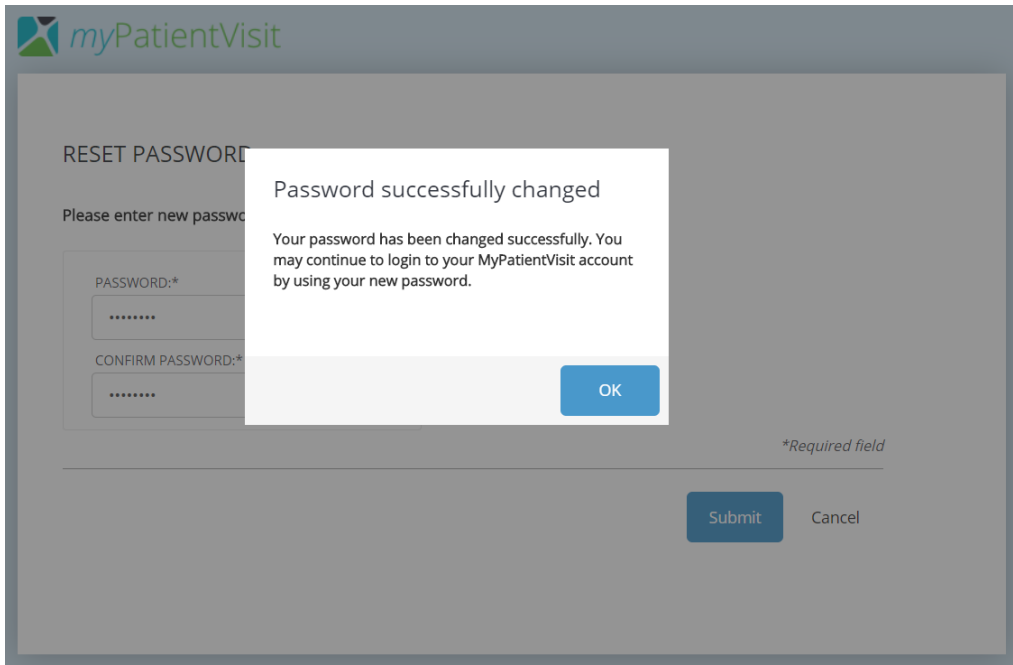
The patient will be able to reset their password. Click on "Submit" after entering a new password.



The screenshot shows the MyPatientVisit logo at the top left. Below it, the text "RESET PASSWORD" is displayed. The instruction "Please enter new password then confirm again to reset the password." is shown. There are two input fields: "PASSWORD:\*" and "CONFIRM PASSWORD:\*", both with "Enter" text inside. A red box highlights the "Submit" button at the bottom right. The text "\*Required field" is located below the input fields.

## MyPatientVisit Patient Portal User Guide for IntellectPro

The patient will get confirmation that their password was successfully changed.



The patient will then be taken to the login screen where they will enter the correct username and password to access their account.