STI Computer Services, Inc.

2014

PatientPortal User Manual

IMPORTANT: The Meaningful Use Dashboard provides statistical information for aiding healthcare providers in meeting Meaningful Use Objectives. Healthcare providers are cautioned that the denominators shown on the Meaningful Use Dashboard are based solely on information entered into the ChartMaker® Clinical Module. If a patient encounter was not entered into the Clinical Module, that encounter is not included in the denominator for the statistical calculations on the Dashboard. In order to get accurate statistical information for the percentage calculation, to determine if you meet the Meaningful Use requirements, you may need to run additional reports. Please refer to the Center for Medicare and Medicaid Services (CMS) and this user manual for more information about calculating the correct percentage for each individual Meaningful Use Objective.

http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/index.html?redirect=/ehrincentiveprograms
http://www.sticomputer.com/sticustomers.php

Contents

Overview

ChartMaker® PatientPortal

The ChartMaker® PatientPortal is an online service that allows a patient to keep track of their personal health information. It will also allow practices to share and receive information easily with patients.

Details:

- Available with versions 4.3 and higher
- Requirement for Stage 1 (Core Measure: View, Download, Transmit) and Stage 2 (Core Measures: View, Download, Transmit and Secure Electronic Messaging) of the Meaningful Use program starting in 2014
- Configurable by the Practice
- Ability to send and receive messages to and from your patients
- Message Types include: Appointment and Refill Requests, Billing and Health Questions, and General Messages
- Upload health related educational resources for your patients
- Patients create their own username and password
- Patients can update their demographic information
    - Information includes: General information, Responsible Party, Employment Information, Insurance, Emergency Contacts, Pharmacy, Medications, Allergies, History Information
- Patients can view clinical summary information (*automatically gives you credit for Core Measure: Clinical Summaries in the Meaningful Use program)
- Contact Software Support for more information (800-487-9135 or email swsupport@sticomputer.com)

REGISTRATION INSTRUCTIONS

Complete the following steps to start the process of registering your practice with the ChartMaker® PatientPortal service. There is a fee of $29/physician, $15/NP, and/or $15/PA per month.

1. Go to www.sticomputer.com
2. Click “CUSTOMERS”
3. Click “Login”, enter your credentials and then click “Log In”

   ALTERNATE METHOD: If you do not have login credentials, click “Registration”, complete the registration form and click “Register”.
4. Click “PatientPortal” (from the left navigation pane)
5. Click “Click here to register for ChartMaker® PatientPortal”
6. Enter the applicable information and click “Submit”

   NOTE: Upon completion of this form, an STI Representative will contact you, via the email address you provided, to complete the setup process, as well as provide information about enrolling for PatientPortal training.

Pages

The ChartMaker® PatientPortal has pre-defined pages, which every practice can configure. The page options will differ depending on the type of user that is logging in. Administrators for your Portal will see pages allowing them to configure the Portal while Patients will see patient-specific pages and information.

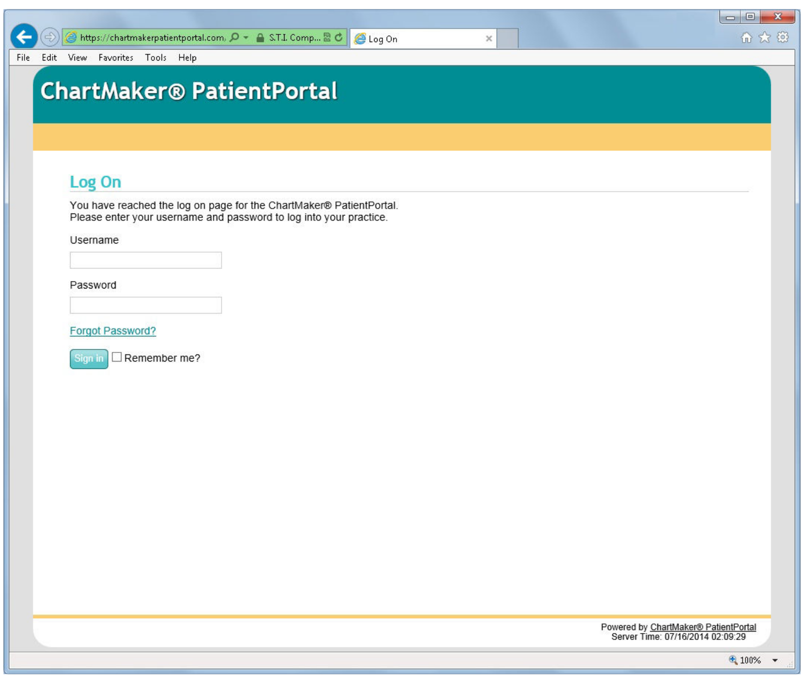
Everyone will go to www.chartmakerpatientportal.com to access the PatientPortal.

> **NOTE**: Patients should not be instructed to go to this page unless they have completed registration. There is no way to create a new user from this page.

COMMON PAGES (ADMINISTRATORS AND PATIENTS)

Log On:

The Log On page is the first page patients and administrators will encounter after typing in the web address into a browser. Everyone using the ChartMaker® PatientPortal will access this same page. From this page the user will be able to log in with their previously registered credentials and/or send a request for their password ("Forgot Password?").



Home:

The Home page is the first page a user will see after logging into the Portal.

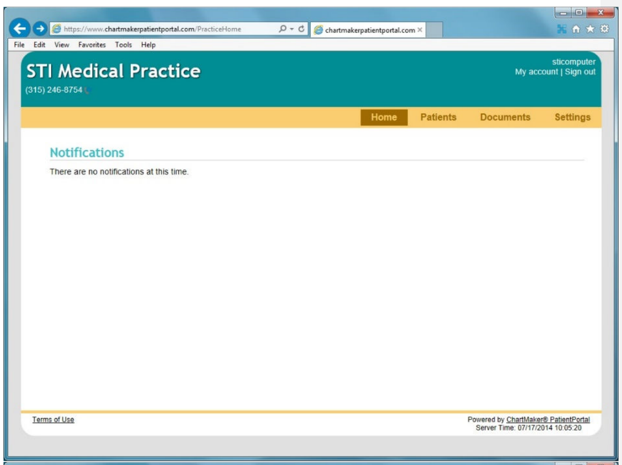
Administrators will see a “Notifications” section where messages from STI Computer Services may be displayed.

Patients will see a welcome message/instructional text on the left. This section will be configured by your Administrator. On the right, the patient will see their name and address as well as any notifications regarding changes to their account.

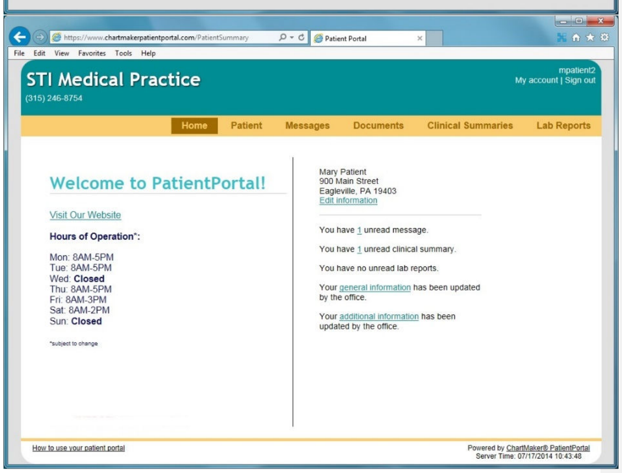
Patients will be able to click “Edit Information” to modify their contact details. When they do so it will redirect them to the “Patient” page.

If the patient has new activity on their account, they will be able to click on the numeral in the notification which will redirect them to the applicable page (Clinical Summaries, Labs, etc.) to view the information.

Administrator View:



Patient View:



Documents (Administrator):

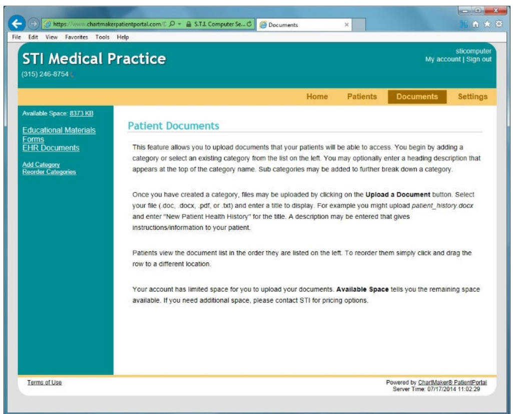
The Documents page will allow the Administrator to organize and modify the document options that the patient can access from the patient's (or patient representative's) Documents page. The documents can be grouped by categories for easier access. Acceptable document types include .doc, .docx, pdf or .txt. Your account has 10 MB by default for you to upload documents. "Available Space" indicates the remaining space available. If you need additional space, please contact STI for pricing options. This information is not patient-specific and will be seen by all registered patients and/or patient representatives.

To configure this page, start by clicking "Add Category", enter a Category Name and Description and click "Save". Then click "Upload" ( ) to begin adding documents. Click "Choose File", enter a Display Name, Description (optional) and click "Save". Repeat those steps for any additional documents.

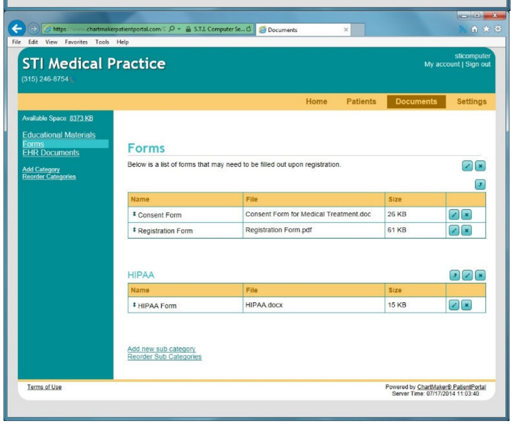
To reorder documents within a specific category, simply click and drag the row to the desired location. To reorder the categories, click "Reorder Categories" and click and drag the row to the desired location.

To modify an item, click "Edit" ( ). To remove an item, click "Delete" ( ).

Main View:

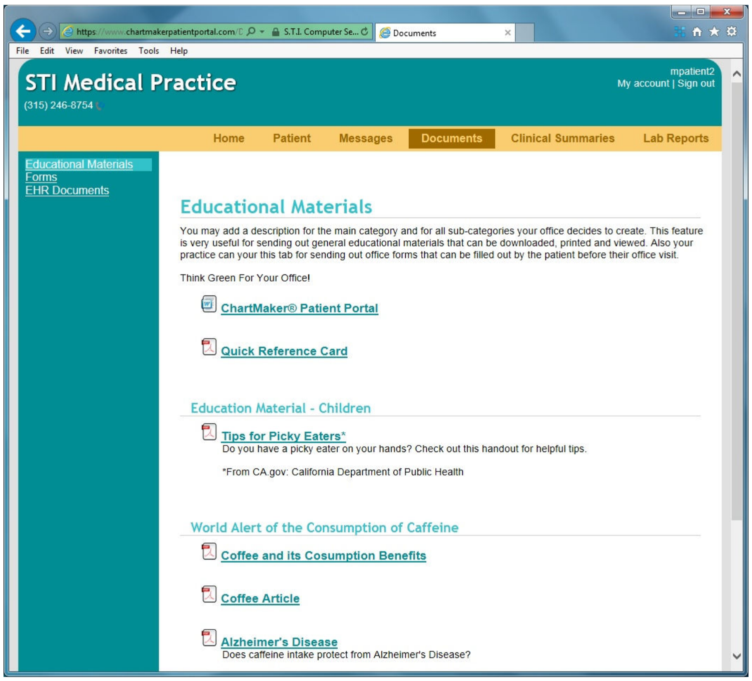


Category View:



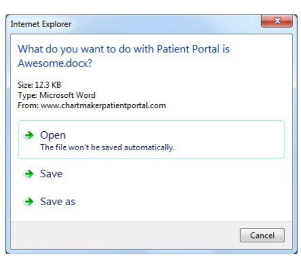
Documents (Patient):

The Documents page will allow the patient (or patient representative) to view or download materials that the practice has made available. These documents could be registration forms, educational materials, etc.



The steps taken after the patient clicks on an individual document will vary depending on the Internet browser they are using. For instance, when a document is selected through the Google Chrome browser, most likely the document will be displayed at the bottom of the browser dialog, with the option to click the arrow to view download options:

When a document is selected through the Internet Explorer browser, most likely the document will open in a separate browser tab/window and a pop-up prompting the patient for the next steps may be displayed:



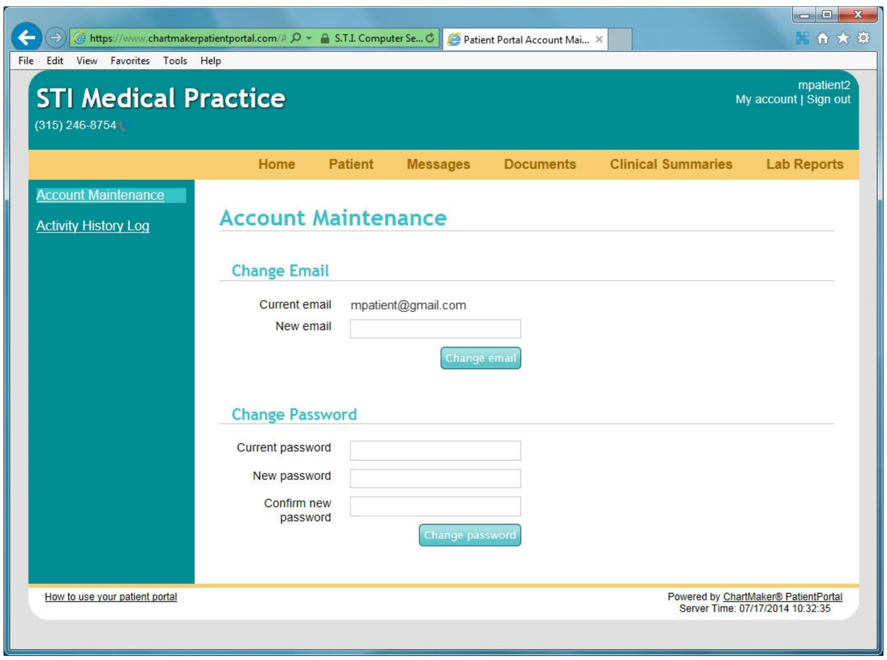
My Account:

The My Account page allows a user to change the email address associated with the PatientPortal as well as their password. A valid email is not required for Administrator accounts, however they are required for patient accounts.

To change the email, enter the updated email address in the “New email” field and click “Change email”.

To change the password, enter the updated password in both the “New password” and “Confirm new password” fields and click “Change password”.

The patient can also see the activity that has occurred (by them or their authorized representative) on their account by clicking “Activity History Log” from the left navigation pane. Administrators do not have this option.



Sign Out:

The Sign Out link will sign the user out of the PatientPortal and redirect them back to the Log On page.

ADMINISTRATORS ONLY

Patients:

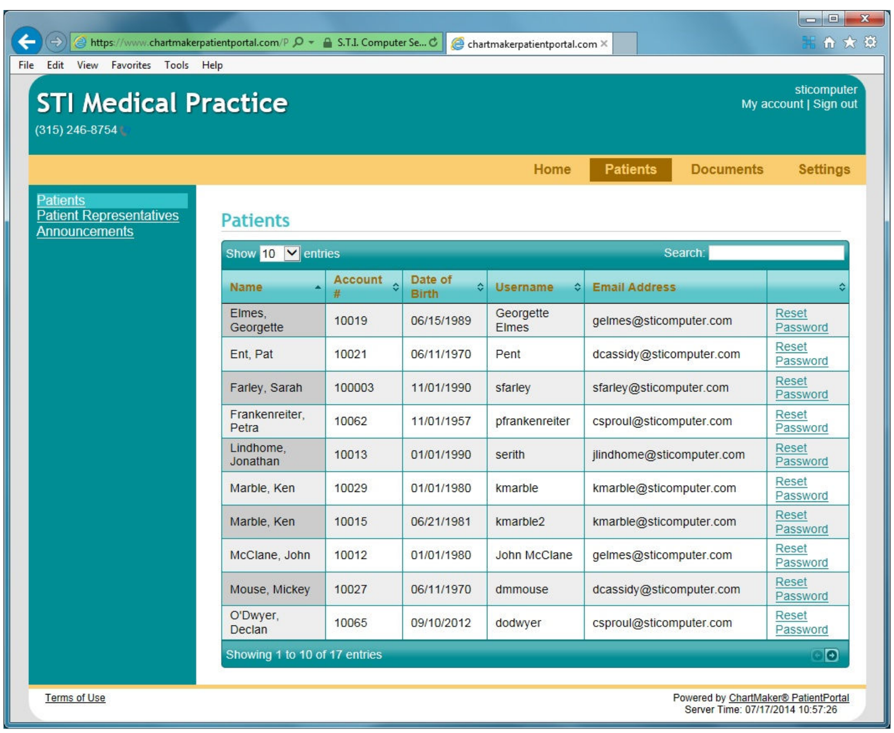
The Administrator's "Patients" page will have a list of all registered patients and patient representatives with the option to reset their password if necessary. This page also gives the Administrator the ability to send a broadcast message to all registered patients by clicking in on the "Announcements" link.

To reset a patient or patient representative's password, click "Reset Password" and then "Yes" to confirm. An email notification will be sent to the patient or patient representative with their new password.

> **NOTE**: Patients can reset their own password by going to the "My Account" page. Administrator assistance is only necessary if the patient forgets their username and/or their security question.

To send a broadcast message, click "Announcements" from the left navigation pane, type a Subject and Message and then click "Send". The message will be sent to all registered PatientPortal users (including patient representatives).

> **NOTE**: Broadcast messages will even be sent to patients that have been suspended (i.e. the patient's PatientPortal button appears red in Practice Manager and Clinical).

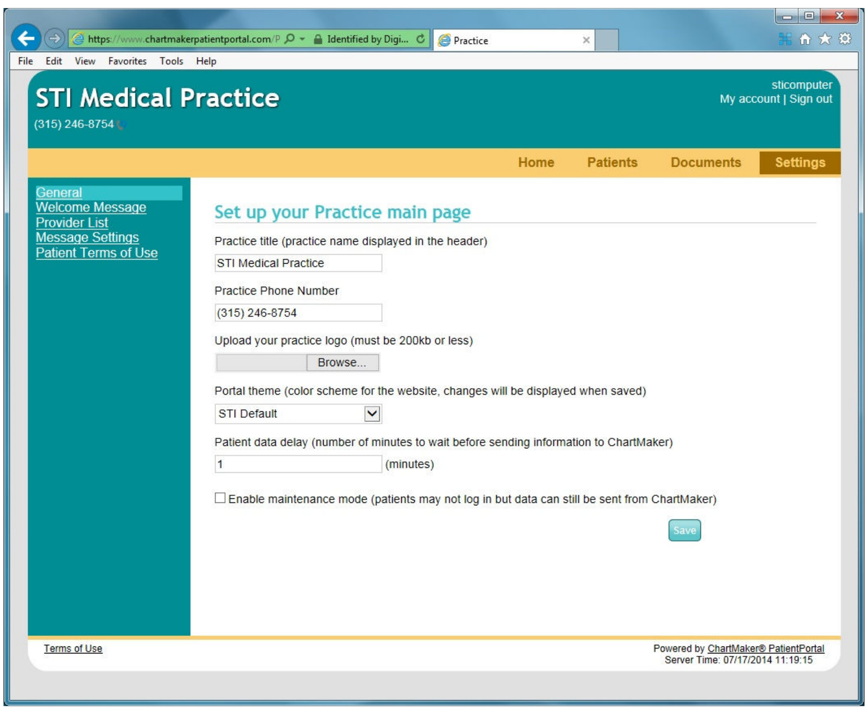


Settings:

The Settings page will allow the Administrator to configure the overall theme of the PatientPortal, practice information, and various message details. They will also be able to turn on maintenance mode and/or configure the data delay interval. Specifics for each page are detailed below.

General:

- **Practice Title**: Practice Name, which will appear on the masthead
- **Practice Phone Number**: Appears under the Practice title
- **Practice Logo**: An image file 200 KB or less which will be positioned to the left of Practice Title. Click “Browse” to search for and upload a file
- **Portal Theme**: Set the color scheme for the Portal selecting from the 13 pre-configured options. You will see the change take affect once you click “Save”.
- **Patient Data Delay**: Configuration used to batch demographic updates before the information is sent to the Health Portal (in case of multiple updates by patient). The default is 30 minutes and can be changed, however it is suggested to keep a longer interval if possible. This configuration only affects demographic information and not messages sent by the patient.
- **Enable Maintenance Mode**: Check the box to suspend the ability for any user to log into the PatientPortal. Patients can still be authorized and/or complete registration, however they will receive a “this site is under maintenance, please check back later” webpage when attempting to log in.



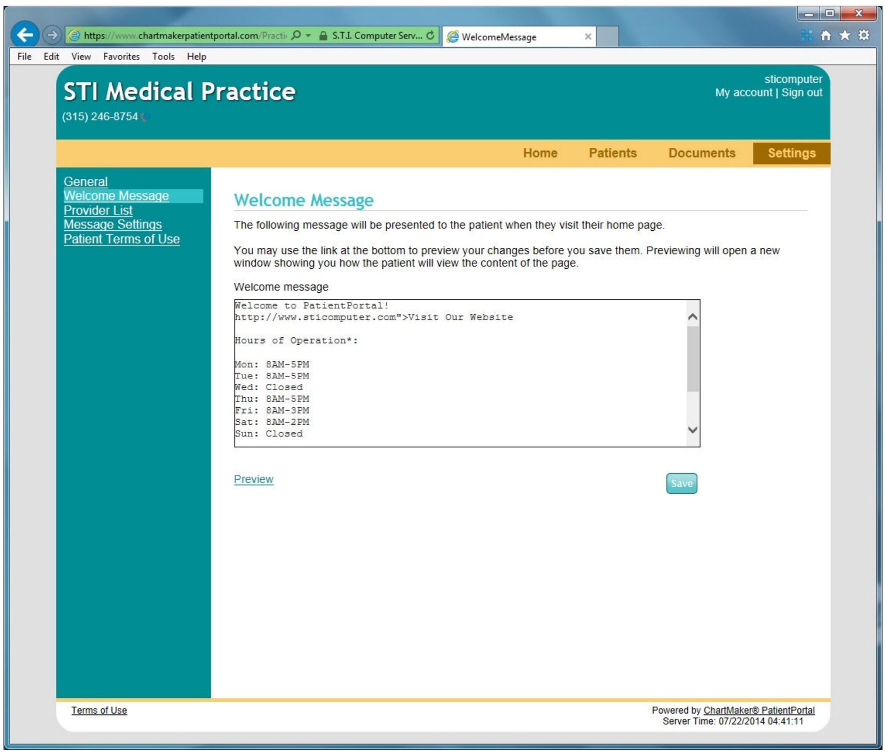
Click “Save” to accept any changes made before navigating to a different page.

Welcome Message:
The Welcome Message page allows an Administrator to configure the text that will appear on the main page of the PatientPortal when a patient logs in. Examples of information that could be displayed here would be (but not limited to): reminders to call 911 in case of emergency and not to use the PatientPortal, practice hours and/or contact information or basic instructions on how to navigate the Portal. This information is not patient-specific and will be seen by all registered patients and/or patient representatives. There is a text limit of 512 characters.

To see what the Welcome Message will look like prior to finalizing, click “Preview”.

> **NOTE:** You may have to allow pop-ups in your browser to view a preview of this page.

Click “Save” to accept any changes made before navigating to a different page.

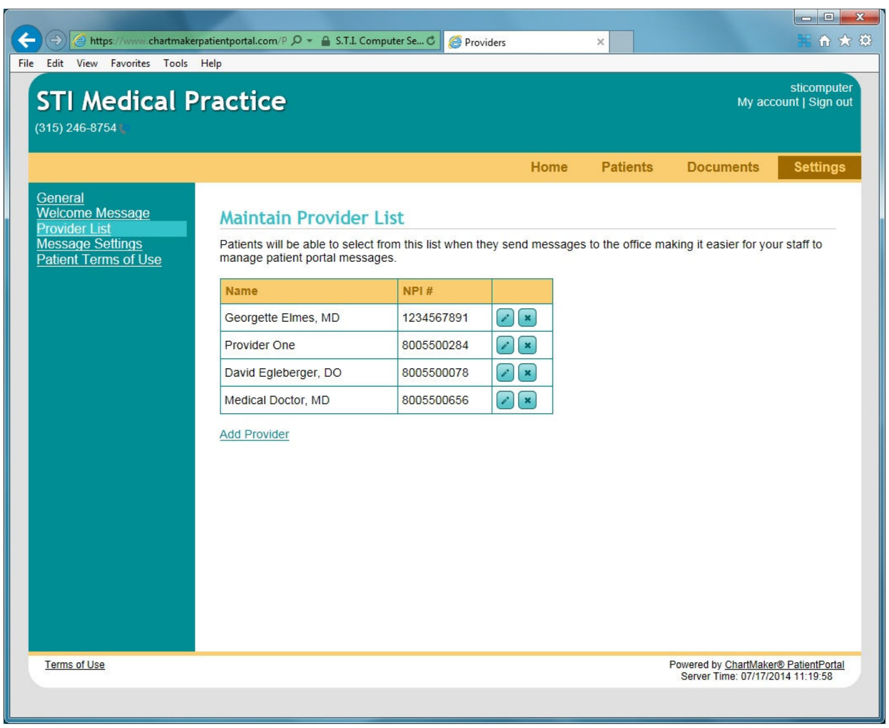


Provider List:
The Provider List page allows an Administrator to maintain a list of providers that will be utilizing the PatientPortal. The list created here will be the list of providers displayed to the patient when attempting to send a message through the Portal.

> **NOTE**: This list is not linked to Practice Manager/Clinical so if you add a Provider you must remember to manually add them to the PatientPortal as well.

To add a new provider, click "Add Provider". Enter their Name, NPI # and click "Save". **NPI is required** in order to save the information.

To modify provider information, click "Edit" ( ). To remove a provider from the list, click "Delete" ( ).



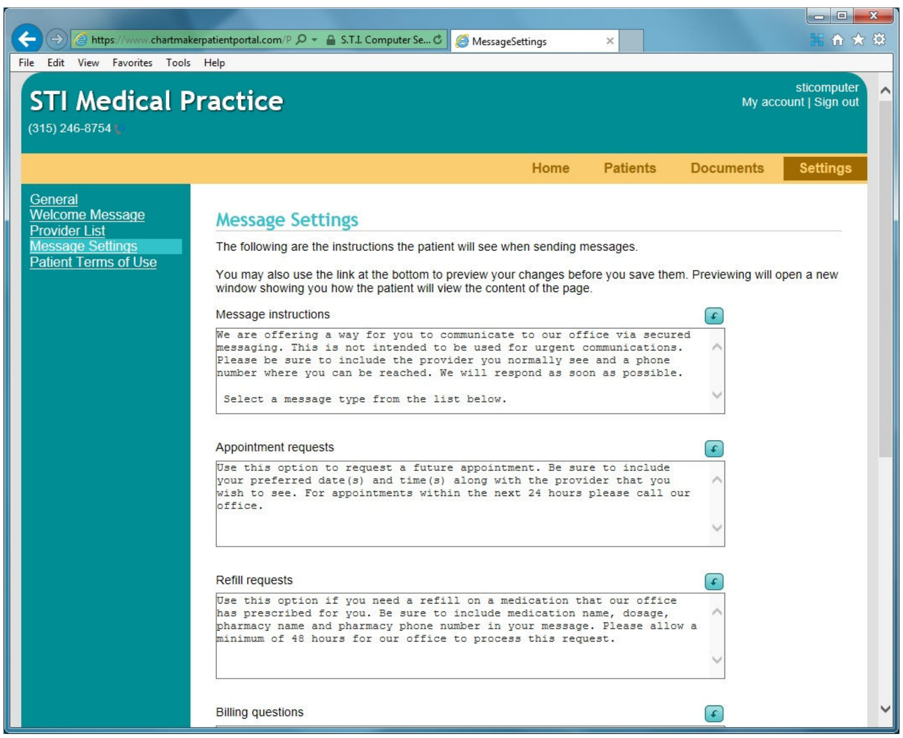
Message Settings:
The Message Settings page allows an Administrator to customize the descriptive text that appears below each message type. This information will be displayed on the "Messages" page that is accessed by a Patient.

To see what the Messages page will look like prior to finalizing, click "Preview".

> **NOTE:** You may have to allow pop-ups in your browser to view a preview of this page.

To restore the text back to the original pre-configured text provided by STI, click "Restore default" ( ) next to the applicable message type.

Click "Save" to accept any changes made before navigating to a different page.

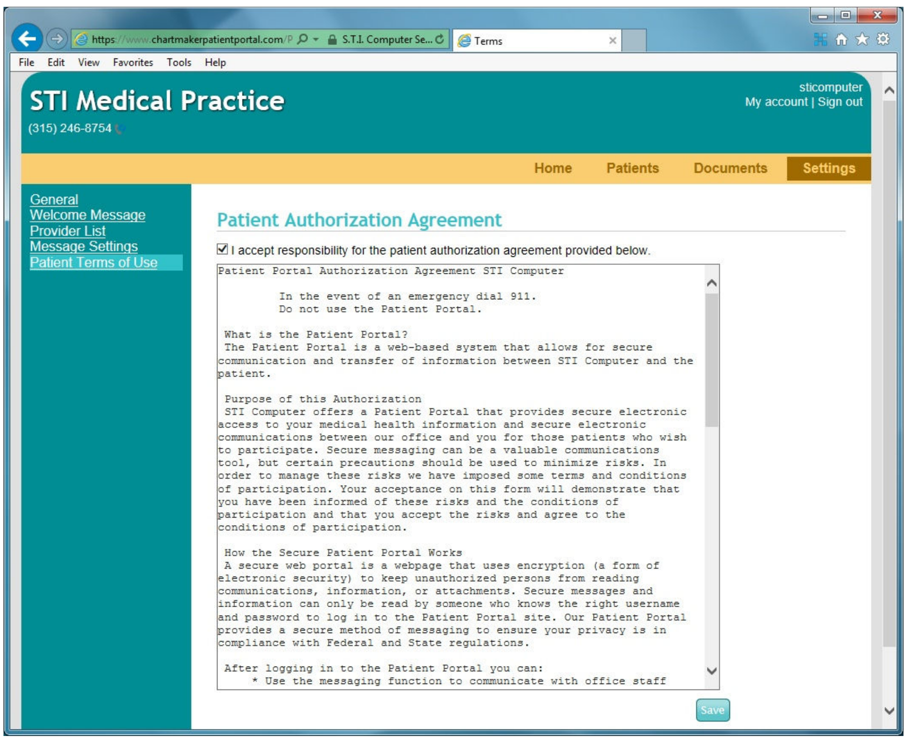


Patient Terms of Use:
The Patient Terms of Use page allows an Administrator to customize the Authorization Agreement text the patient accepts prior to finalizing registration and begin using the PatientPortal.

By default, the PatientPortal will come with a generic Authorization Agreement that should be modified for your practice.

After customizing the text, click the box for “I accept responsibility for the patient authorization agreement provided below.”.

Click “Save” to accept any changes made before navigating to a different page.



PATIENTS ONLY

Patient:

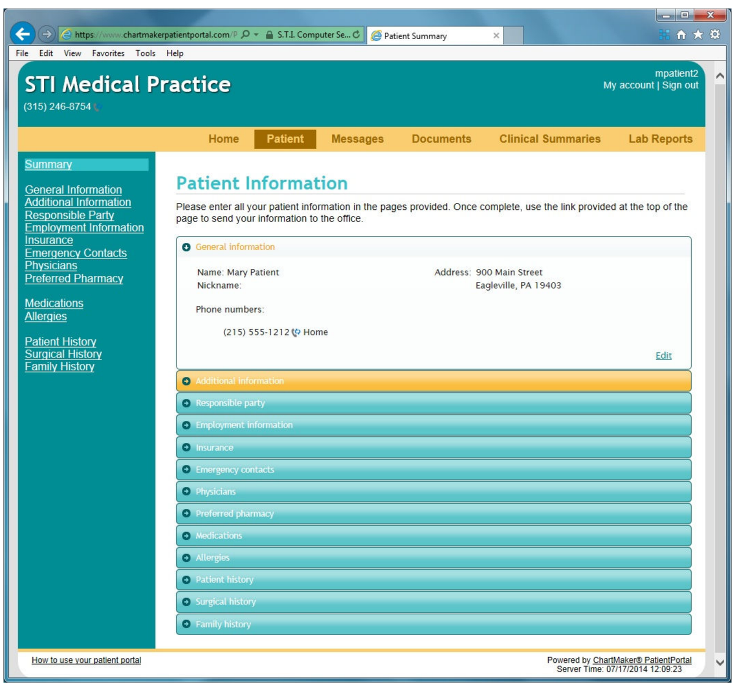
The Patient page allows a patient (or patient representative) to modify their demographic and medical information. The patient can modify their information either by expanding the sections using the arrows ( ) in the main navigation pane and then clicking "Edit" or by clicking on the appropriate link from the left navigation pane.

Information that can be modified includes: General (contact) Information, Additional (demographic) Information, Responsible Party, Employment Information, Insurance Emergency Contacts, Physicians, Preferred Pharmacy, Medications, Allergies, Patient History, Surgical History and Family History.

Fields marked with an asterisk (*) are required. For existing Phone, Insurance, Emergency Contact, Physician, Medications, Allergies, Surgical History and Family History information, a user can modify the information by clicking "Edit" ( ). To remove information, click "Delete" ( ).

Click "Save" to accept any changes made before navigating to a different page.

> **NOTE**: The patient will need to click "Send Now" (There are unsent changes. Send now.) after they are done making changes in order for the information to be sent to the Health Portal.



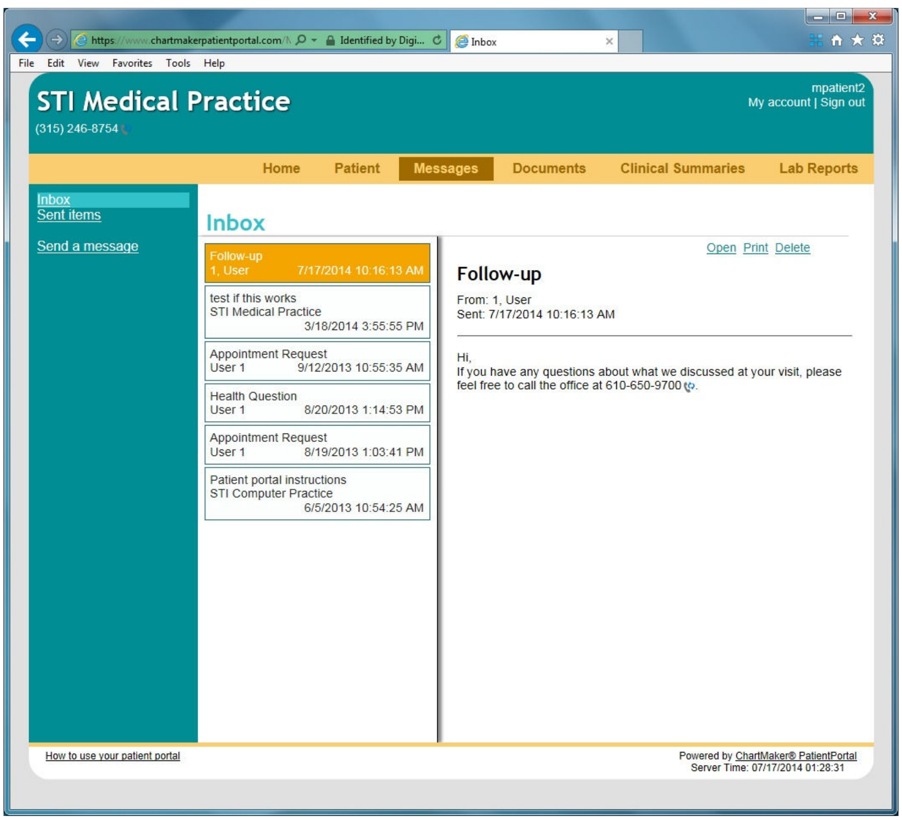
Messages:

The Messages page allows the patient (or patient representative) to view, print, delete and send secure messages to the practice. Messages generated from this page will be sent to the users configured for the respective Distribution Lists, which are set up through Practice Manager or Clinical. See the section on “Configuring Message Distribution Lists” from within the Appendix on page 28 for more information. The patient will be able to select from one of the following message types: Appointment Request, Refill Request, Billing Question, Health Question and/or General Office Message.

To open the selected message in a separate browser window, click “Open”. To print the selected message, click “Print”. To delete the selected message, click “Delete”.

To view messages sent from this patient to the practice, click “Sent items” from the left navigation pane.

To send a new message to the practice, the patient will click “Send a message” from the left navigation pane. They will then click the applicable message type, select the Provider, enter a phone number for contact purposes, the message and then click “Send”.

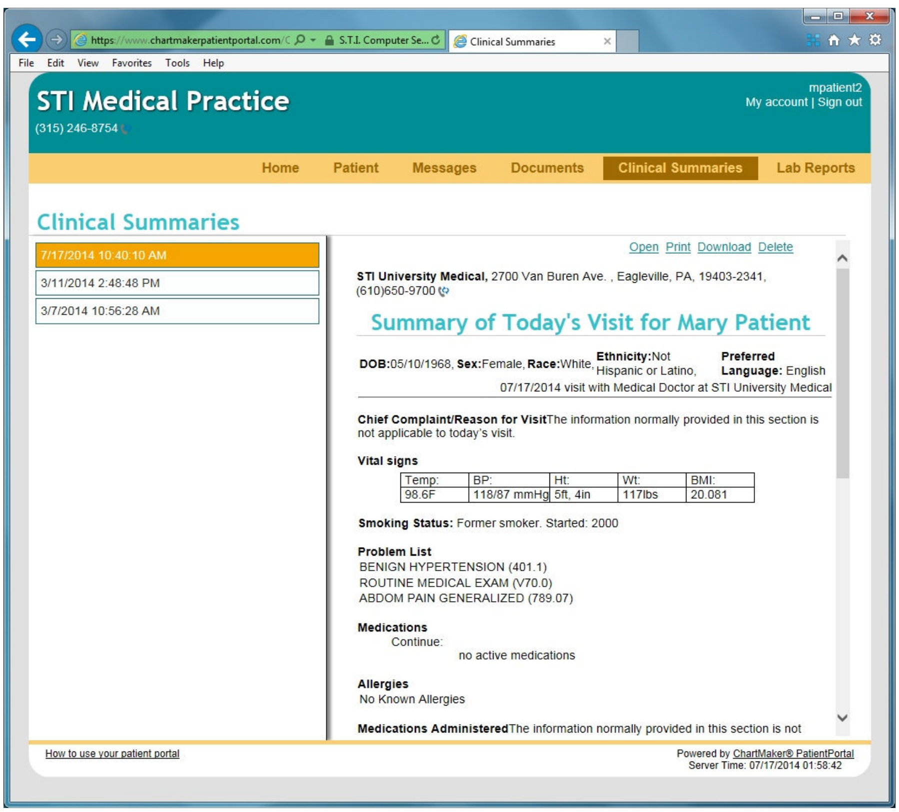


Clinical Summaries:

The Clinical Summaries page allows the patient (or patient representative) to view, print, download or delete the clinical summary sent to the PatientPortal for each office visit. The list of clinical summaries located in the left navigation pane will be organized by date, with the most recent being at the top.

ChartMaker® Clinical will automatically send the Clinical Summary to the PatientPortal upon note signing for any registered patient that is not in suspended mode. (See the section on "Suspending Data Export" from within the Appendix on page 30 for more information.) This will automatically give the provider credit for the Core Meaningful Use measure.

To open the selected clinical summary in a separate browser window, click "Open". To print the selected clinical summary, click "Print". To save the selected clinical summary locally, click "Download". To delete the selected clinical summary, click "Delete".



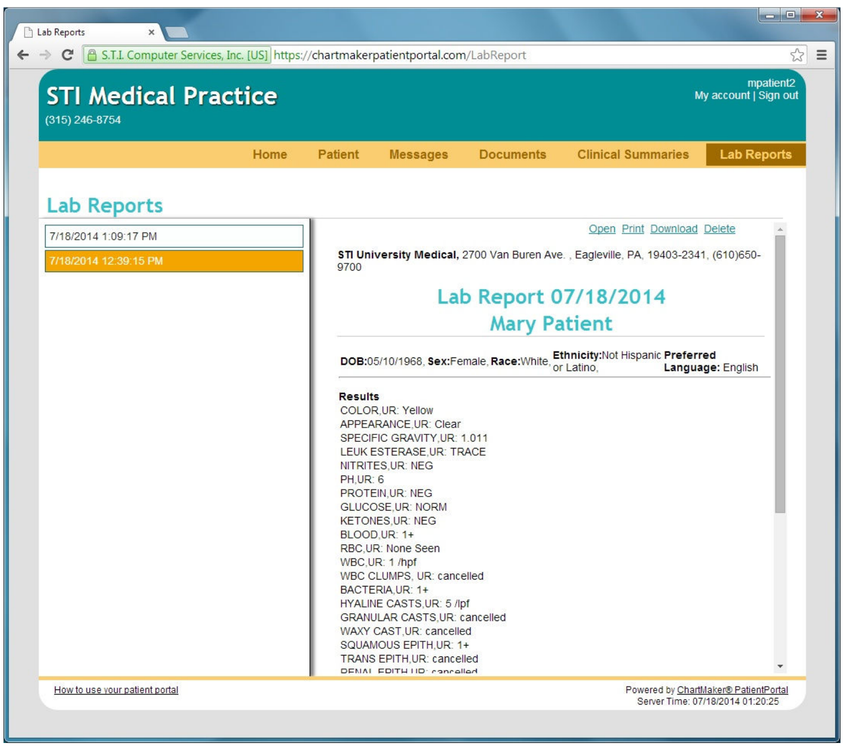
NOTE: As of 5.4, Clinical Summary documents will collect information based on a selected note and not by which notes have the same visit date.

Lab Reports:

The Lab Reports page allows the patient (or patient representative) to view, print, download or delete any lab information sent to the PatientPortal. The list of lab reports located in the left navigation pane will be organized by date, with the most recent being at the top.

ChartMaker® Clinical will automatically send the lab report to the PatientPortal upon signing of the lab report (or chart note including lab values) for any registered patient that is not in suspended mode. (See the section on “Suspending Data Export” from within the Appendix on page 30 for more information.)

To open the selected lab report in a separate browser window, click “Open”. To print the selected lab report, click “Print”. To save the selected lab report locally, click “Download”. To delete the selected lab report, click “Delete”.



NOTES: Lab results will be sent to the PatientPortal upon signing. "Appropriately configured" lab results refers to the lab condition being designated as a Type of "Lab" with an applicable LOINC code attached as well. Lab conditions are configured by going to Edit > System Tables > Conditions > Results. After you find the applicable lab condition, highlight it and click "Properties".

- In 5.1 and below, all appropriately configured lab results will be displayed under the "Clinical Summaries" page.

- In 5.2 and 5.3, if lab results are received electronically (via an interface), the lab results will be displayed under the "Lab Reports" page. If lab results are manually entered into a ChartMaker® Clinical note (and appropriately configured), the lab results will be displayed under the "Clinical Summaries" page.

- In 5.4 and beyond, if lab results are received electronically (via an interface), the lab results will be displayed under the "Lab Reports" page. If lab results are manually entered into a ChartMaker® Clinical note that does *not* contain any additional information within it (i.e. medications, allergies, diagnoses, etc.), the lab results will be displayed under the "Lab Reports" page. If lab results are manually entered into a ChartMaker® Clinical note that *does* contain additional information (i.e. medications, allergies, diagnoses, etc.), the lab results will be displayed under the "Clinical Summaries" page. Scanned lab results will be displayed on the PatientPortal under the "Other Information" page and will be labeled as "Health Information Updates".

FAQs

What information is uploaded to the Portal for an individual patient?

A: Clinical Summary, lab results and demographic information will be uploaded to the PatientPortal. For Clinical Summaries, this includes patient name, chart number, gender, date of birth, address, phone numbers, race, ethnicity, preferred language, allergies, immunizations, medications, problems (diagnoses), procedures, reason for referral, results, social status and vitals. Chief complaint, cognitive status, functional status, instructions, and plan of care (which contains sections for: educational materials, future appointment dates, pending in house lab orders, and off-site orders) are also included but only if documented through a properly configured template tool (corresponding "button" or checklist).

Lab Results will contain description, value and unit of measure, however, starting in version 5.5, the entire lab report will be sent to the PatientPortal.

Demographic information includes patient name, gender, date of birth, race, ethnicity, preferred language, phone numbers and address. Demographic information is only updated if one of the 3 document types (Clinical Summary, Lab Result, or Scan) is sent to the PatientPortal. If no document is sent, then the PatientPortal will not receive any demographic updates, even if the information was modified in Practice Manager/Clinical.

Am I required to use the PatientPortal?

A: If your practice is attempting to meet Meaningful Use, usage of a PatientPortal is required for both Stage 1 and Stage 2 starting in 2014. If your practice has no plans to attain Meaningful Use then it is up to your discretion as to whether you incorporate this functionality.

How will the patient know how to navigate the PatientPortal?

A: Besides patient education by the staff at your practice, the patient will also receive a welcome email (on the PatientPortal) upon registration. There is also a link at the bottom of the webpage titled, “How to use your patient portal” that will provide them with the same information included in the welcome email.

Can you suspend the data export for all patients at once?

A: No. The data export suspension process is done per patient on the Patient tab in Practice Manager.

How do we prevent lab results from being uploaded?

A: In order to stop lab results from being uploaded to the PatientPortal, the data export must be suspended. To do so, **open the patient's account** in Practice Manager through the Patient tab. Then click **"Patient Portal"** and check the box for **"Suspend export on note signing"** and then **"OK"**. Alternatively, this can be done through Clinical by opening the patient's chart and clicking the "Patient Portal" icon from the bottom of the Face Sheet. This will also stop the automatic upload of Clinical Summary information as well.

Does the patient receive a notification if our practice uploads a new Document to the Portal?

A: No. Documents uploaded to the PatientPortal (accessed through the "Documents" menu) are not patient-specific and can be seen by anyone accessing the Portal. Because of this, uploaded documents should be generic in nature.

Is there a way to disable certain message types?

A: No, however your practice can customize the descriptive text that appears below each message type so you could use this area to communicate important information regarding the types of messages that should be used.

How do I determine who receives the messages sent by a patient through the Portal?

A: Recipients are configured through Distribution Lists, which are accessed through the messaging dialog (**To-Do** > **New Message/Task…** > **To**). Reference the section on "Configuring Message Distribution Lists" on page 28 for more information.

Can I initiate a conversation with a patient through the portal?

A: Yes! As of version 4.5, the practice has the ability to send a secure message to the patient via the PatientPortal. To do so, **open the patient's chart** in Clinical and go to **To-Do** > **New Patient Portal Message**. The patient will receive an email notification informing them that they have a new message waiting for them on the PatientPortal.

Can a patient reset their username and/or password?

A: Patients have the ability to reset their password in one of two ways. If they know their password, they can reset it by going to **"My Account"** after logging into the Portal. If they do *not* know their password, they can click **"Forgot Password?"** from the login page. They will be prompted to enter the answer to the Security Question they set up during registration. If the patient does not know the answer to their Security Question then they will need to contact the Administrator at your practice. Administrators can reset passwords from the Admin console (**Patients** page). Currently usernames cannot be reset. If the patient forgot their username, the Administrator can look it up through the Patients page on the Portal.

What happens if the patient changes their email address? Do I have to re-register them?

A: No, re-registration is not necessary. If the patient changes their email address through the "My Account" page on the PatientPortal, communication between your database and the PatientPortal will continue. Your practice will not be notified via a To-Do List reminder when patients make this type of change so it is recommended that you inform your patients to directly contact your office with this type information. Your staff will then manually update the patient's email in either Practice Manager or Clinical.

Will patients be prompted to change their password periodically?

A: No, the system does not remind patients to change their password.

Can multiple patients use the same email to be authorized?

A: Yes. Each patient's (email) welcome message will contain their first name which is how they will determine who the welcome message is for.

Can we fulfill patient recalls (reminders) through the PatientPortal?

A: Not at this time however it is planned as a future enhancement.

Does the ChartMaker® PatientPortal support multiple languages?

A: Currently, the PatientPortal does not offer multiple language support. However, your practice could include instructional information in a different language wherever the option to configure text is available. A tool such as Google Translate could be used to identify the desired text which could then be copied and pasted onto your Portal.

Can we change the font (color, bold, etc.) that appears on the Portal?

A: No, this type of functionality is not currently available.

Can we link our practice's website to the PatientPortal and vice versa?

A: Yes! To include a link to your website on the PatientPortal you will need basic HTML code. If you are unfamiliar with HMTL, someone from Clinical Software Support can assist you. Your website administrator can inform you as to how to include a link to the PatientPortal on your website.

How often are programmatic changes made to the PatientPortal?

A: Enhancements to the PatientPortal are made on a regular basis, typically about 3 times per year, but the release schedule may vary depending on necessity.

Is there a fee to use the PatientPortal?

A: Yes. Reference the section on "Registration Instructions" on page 4 for more information.

Appendix

ANNOUNCEMENT TEMPLATE

In order to aid in the patient engagement process, STI has created a generic template that could be used to announce the launch of your practice's PatientPortal site. This template is a Microsoft Word document and should be modified before using for your practice. **In the least, all the text in red should be replaced**.

To access the template:

1. Go to www.sticomputer.com
2. Click "CUSTOMERS" and login
3. Click "PatientPortal" from the left navigation pane
4. Under the Training and Help Documents section, click "PatientPortal Announcement Template"

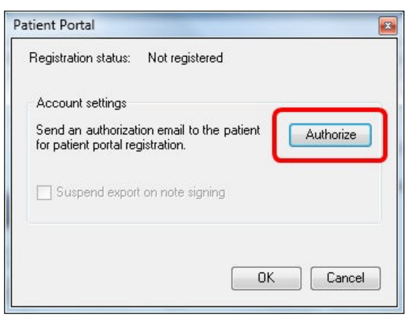
   Commented [S1]: Can we also tell them that it's under the PP link?

   ALTERNATIVE METHOD: After step 2, click "Help Documents" and then under the Meaningful Use (2014) section, click "PatientPortal Announcement Template".

   Commented [S2]: Can we also tell them that it's under the PP link?

AUTHORIZING A PATIENT FOR THE PATIENTPORTAL

1. In Practice Manager, open the patient's account through the Patient tab
2. Click "Patient Portal"
3. Click "Authorize"



4. Click "OK"

   NOTE: An email notification will be sent to the patient (to the email documented on the Patient tab) requesting that they complete the registration process. The patient must click on the link and complete the registration form before they can access their health information on the Portal. In versions 5.2 and below, do not attempt to authorize patients that have the "NEW" prefix in their account number.

RE-AUTHORIZING A PATIENT FOR THE PATIENTPORTAL

If the registration email needs to be sent again, this can be done at any point while the PatientPortal button is still yellow by clicking the "Authorize" button again.

If the patient would like the registration email to be sent to a different email address from the original request, change the email address *first* in Practice Manager and then click "Authorize" again.

SUSPENDING DATA EXPORT

To stop the automatic export of patient information (clinical summaries, lab data, etc.):

1. In Practice Manager, open the patient's account through the Patient tab
2. Click "Patient Portal"
3. Click "Suspend export on note signing"

4. Click "OK"

   NOTE: The PatientPortal button will appear red in Practice Manager and Clinical if the patient's data export has been suspended. To unsuspend the export, uncheck the box for "Suspend export on note signing" and click "OK".

AUTHORIZING A PATIENT REPRESENTATIVE

Patient Representatives can be added to a patient's chart at any time however the patient must be registered on the PatientPortal prior to authorizing a representative for PatientPortal usage.

1. In Clinical, open the patient's chart
2. Click the "ID" tab
3. Click "Add" under the Patient Representative section
4. Enter the representative's information, including Email
5. Click "Enable representative for patient portal"
6. Click "OK"
7. Save and/or close the patient's chart

   NOTE: A registration email will be sent to the patient representative. They must click on the link from within the email and complete registration before gaining access to the PatientPortal.

UPDATING THE EMAIL ASSOCIATED WITH A REGISTERED PATIENTPORTAL ACCOUNT

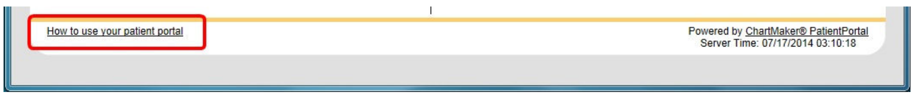
If the patient is already registered (i.e. PatientPortal button is green) and wants to update the email associated with their PatientPortal account, the patient must modify their email through the "My Account" page on the PatientPortal. Administrators can change the patient's email in Practice Manager/Clinical however this will not update the patient's PatientPortal account. See instructions regarding the "My Account" page for more information on how to update an email associated with a PatientPortal account.

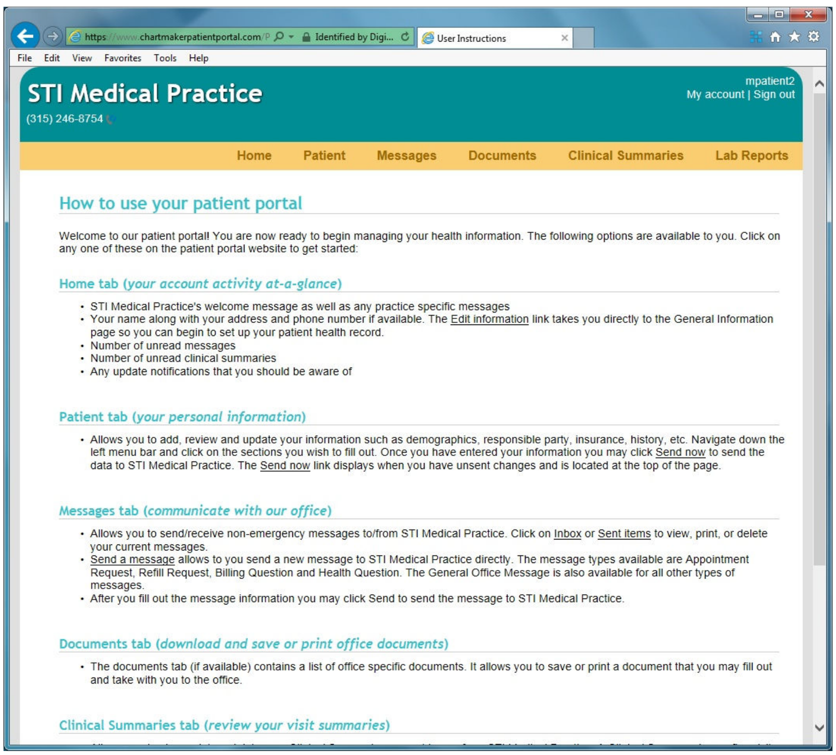
RESETTING A PATIENT'S PASSWORD

An Administrator can reset the patient's password by logging into the PatientPortal, clicking "Patients" and then "Reset Password" for the applicable patient. A Patient can reset their password either by logging into the PatientPortal and going to "My Account" or, if they forgot their username, then they can click "Forgot Password?" from the login screen to complete the process.

PATIENTPORTAL USAGE INSTRUCTIONS

To view basic instructions on navigating the ChartMaker® PatientPortal, click “How to use your patient portal” from the bottom of the page. This option is only available for the patient (or patient representative), not Administrators.





CONFIGURING MESSAGE DISTRIBUTION LISTS

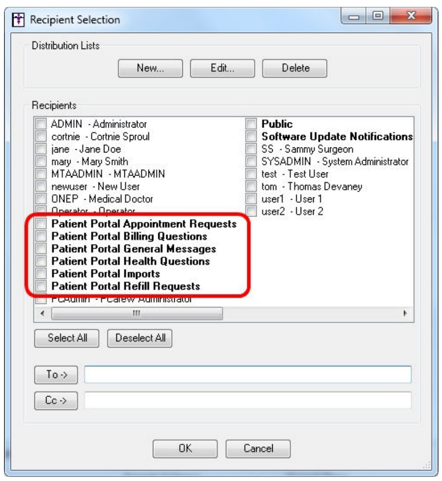
Messages sent from the PatientPortal will appear on the To Do List in Clinical/Practice Manager for the users configured to receive that type of message. Distribution Lists are set up through the messaging dialog by completing the following steps:

1. Click “To-Do > New Message/Task…”

2. Click “To…”

3. Highlight the appropriate Distribution List

   NOTE: Distribution Lists show as bolded text. The lists pertaining to the PatientPortal all start with “Patient Portal…”. Options includes: Appointment Requests, Billing Questions, General Messages, Health Questions, Imports and Refill Requests. These are system defaulted distribution lists and cannot be deleted



4. Click “Edit…”

5. Add/remove users as needed by clicking the checkbox next to their name

6. Click “Save”

7. Click “OK” or “Cancel”

8. Click “Cancel” to close the Message Details dialog

RESPONDING TO MESSAGES SENT FROM THE PATIENTPORTAL

To respond to a message that was sent via the PatientPortal:

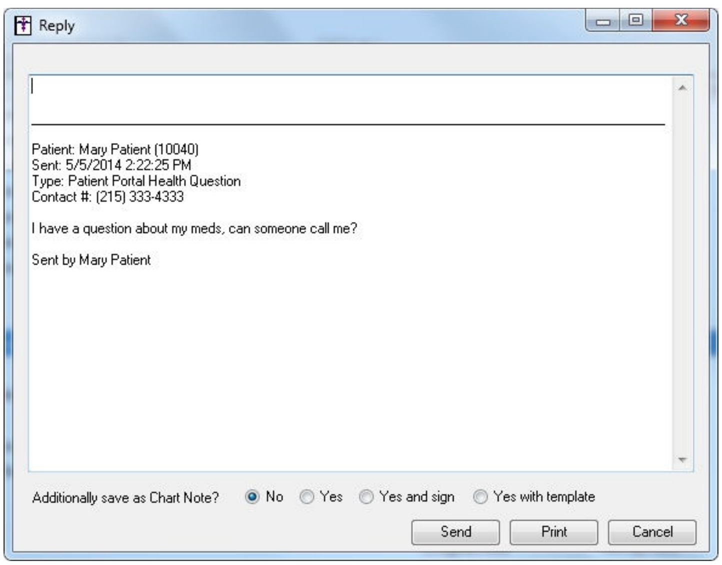
1. Double-click on the message from the To-Do List

   ALTERNATE METHOD: Highlight the applicable message and click "View".

2. Click "Reply" and type your response

   NOTE: You can save a copy of this message in the patient's chart by selecting the "Yes and sign" option before proceeding to the next step.

3. Click "Send"



NOTES:

- If you elect to save the message to the patient's chart, you will get a pop-up asking for you to name the note.
- See the section on "Configuring Message Distribution Lists" in the Appendix on page 28 for more information.
- Patients (or patient representatives) will receive an email notification regarding this activity once the message is sent.

SENDING A MESSAGE TO THE PATIENTPORTAL

To send a message for the patient to view on the PatientPortal:

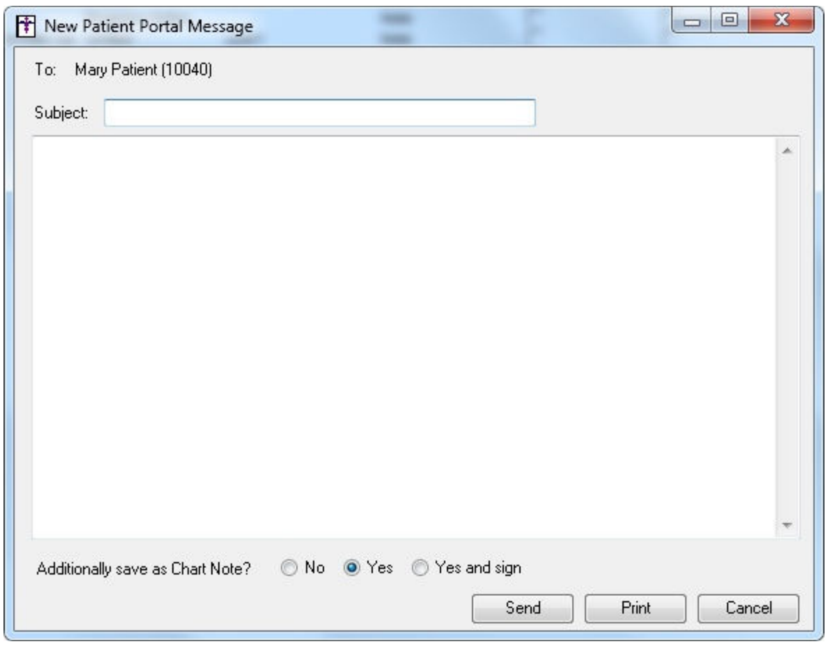
1. In Clinical, open the applicable patient's chart

2. Click "To-Do > New Patient Portal Message…"

3. Enter a Subject and Message

   NOTE: You can save a copy of this message in the patient's chart by selecting the "Yes and sign" option before proceeding to the next step.

4. Click "Send"



NOTES:

- If you elect to save the message to the patient's chart, you will get a pop-up asking for you to name the note.

- Patients (or patient representatives) will receive an email notification regarding this activity once the message is sent.

PATIENTPORTAL REQUIREMENTS FOR MEANINGFUL USE

The Meaningful Use program requires all providers (Stage 1 or Stage 2) to begin using a Patient Portal starting in 2014 and beyond. The requirements vary depending on the stage the provider is completing. Below is a basic overview of what is required. Please reference the "2014 (Stage 1 or Stage 2) Meaningful Use User Manual" which can be found on www.sticomputer.com after clicking "CUSTOMERS", logging in and going to the Help Documents section.

Stage 1 Requirement:

Objective:	**Requirement:**	**Exclusions:**	**Accomplish in Clinical by…**
View, Download and Transmit (Electronic Copy of Health Information)	More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (within 4 business days after the information is available to the EP) online access to their health information subject to the EP's discretion to withhold certain information.	Any EP who neither orders nor creates any of the information listed for inclusion as part of the measure, except for "Patient name" and "Provider's name" and office contact information.	- ChartMaker® PatientPortal usage (Authorize patient through PatientPortal button on Patient tab in Practice Manager) - Note signing within 4 business days - Attaching SNOMED codes to applicable Diagnoses

SUMMARY: Patients must be "authorized" for the PatientPortal through Practice Manager and clinical notes should be signed within 4 business days.

> **NOTE**: In order for the patient to have the ability to view their information online, they must complete registration (by clicking the link contained within the welcome email they receive).

Stage 2 Requirements:

Objective:	Requirement:	Exclusions:	Accomplish in Clinical by…
View, Download, Transmit (Patient Electronic Access)	- More than 50% of all unique patients seen are provided online access to their health information within 4 business days after the information is available to the EP. - More than 5% of all unique patients seen (or their authorized representatives) view, download or transmit to a third party their health information.	Any EP who: (1) Neither orders nor creates any of the information listed for inclusion as part of both measures, except for "Patient name" and "Provider's name and office contact information, may exclude both measures. (2) Conducts 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period may exclude only the second measure.	- ChartMaker® PatientPortal usage (Authorize patient through PatientPortal button on Patient tab in Practice Manager; and Patient submitting Refill Request or Health Question through Messages menu on PatientPortal) - Note signing within 4 business days - Attaching SNOMED codes to applicable Diagnoses
Secure Electronic Messaging	A secure message was sent using the electronic messaging function of CEHRT by more than 5% of unique patients (or their authorized representatives) seen by the EP during the EHR reporting period.	Any EP who has no office visits during the EHR reporting period, or any EP who conducts 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period.	ChartMaker® PatientPortal usage (Message types of "Refill Request" or "Health Question" are the only two that will count)

SUMMARY: For the "View, Download, Transmit" measure, patients must be "authorized" for the PatientPortal through Practice Manager and clinical notes should be signed within 4 business days. Also, patients must interact with the PatientPortal by either viewing, downloading or transmitting their information to a third party. In order for the patient to accomplish this interaction, they must have completed registration. For the "Secure Electronic Messaging" measure, patients must send your practice appropriate secure messages originating through the PatientPortal.

Since ChartMaker® Clinical has the ability to auto-upload Clinical Summary and Lab Result information to the PatientPortal upon note signing, the benefit of PatientPortal usage goes beyond the two measures listed above.

TIPS FOR PATIENTPORTAL ENGAGEMENT

Patient Engagement is the act of motivating your patients to be more involved with their overall care and treatment plan through resources like Patient Portals with the aim of improving health outcomes, increasing provider-patient communication and lowering health care costs. Below are several suggestions as to how to get your patients more engaged:

- **Educate your staff**: By educating your staff on things like how to access the portal and having everyone convey the same message, you can be assured your patients will receive the instruction necessary to get involved. Create policies and procedures that should be adhered to by all employees.
- **Educate your patients:** Have the discussion at check-in or while in the exam room as to what information will be available to them on the PatientPortal. Also mention what type of communication is appropriate for them to be sending you through the PatientPortal (i.e. non-emergent questions).
- **Give them the resources to do it now**: By providing a private area with a computer for the patient to use to complete the registration process, *while still in your office,* will increase the chances significantly of it getting done. Plus once the registration process is complete, your office will be able to send electronic messages to the patient through the PatientPortal increasing the chances of the patient becoming more involved.
- **Utilize electronic messaging over a phone call**: Instead of calling the patient to inform them their lab results are back (for example), send them a secure message through the PatientPortal instead.
- **Advertise**: Post signs or instructional handouts that give step-by-step instructions to the patient regarding PatientPortal usage. These handouts should include information as to *why* using the PatientPortal is beneficial to them as well as navigation information. You could also include a statement on your office voice system (i.e. a “hold’ message) informing them about the PatientPortal or giving them the contact information of who to call if they have questions about it.
- **Send them home with information**: Do not assume your patients will remember to register or use the PatientPortal after they leave the office. Send them home with a reminder, which should include step-by-step instructions as well as your contact information in case they have questions.
- **Use the Portal as a way to follow-up with your patients**: By sending the patient a secure message, you will increase the chances of the patient sending a message back to your office (getting you credit for Core Measure: Secure Electronic Messaging). This may also support the perception that your office truly cares about the well-being of its patients.
- **Get patient representatives involved**: Sometimes the patient is not interested or does not have the resources to access the portal but a trusted family member or friend may. Discuss the option of a patient representative accessing their information on behalf of the patient.

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Resources / Notes

Trainer: ________________________ **Phone:** ________________________

STI ChartMaker Clinical Support: **1-800-487-9135** **(Option 1, then Option 2)**

NOTES:

Document Change Log

Date	Version	Changes
8/11/14	5.x	Modified the answer to FAQ: "What happens if the patient changes their email address? Do I have to re-register them?"
8/7/14	5.x	Added section on Resetting a Patient's Password, additional note in regards to the Stage 1 requirement, and added FAQ section.
7/23/14	5.x	Initial Release