



MyPatientVisit  
Patient Portal User Guide

# MyPatientVisit Patient Portal User Guide

## Table of Contents

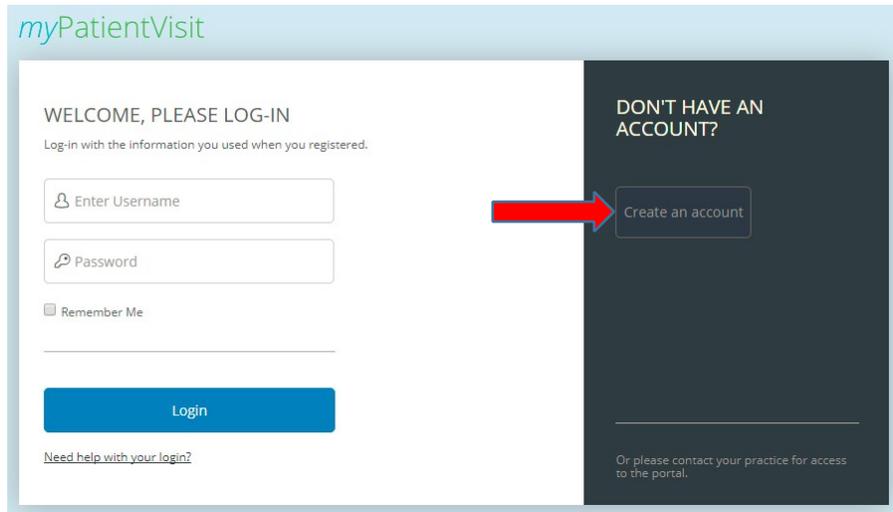
<b>Patient Setup and Login to the Patient Portal</b> .....	<b>2</b>
Patient Registration .....	2
Security Questions.....	3
<b>Patient Portal Dashboard</b> .....	<b>4</b>
Patient’s Dashboard .....	4
Patient Documents in myDocuments View .....	5
Patient Documents View Access Details.....	5
<b>E-Mail Clinical Summary &amp; Patient Documents through the Patient Portal</b> .....	<b>6</b>
Secure Email .....	6
Unencrypted Email .....	7
Unencrypted Email Warning Messages.....	8
Ability to Filter on Summary of Care Documents.....	9
Ability to Multi - Select Documents to View, Download, Transmit and email .....	10
Send a Message .....	10
Connecting to another practice.....	11
<b>Subsequent Patient Login</b> .....	<b>12</b>
Patient Login .....	12
<b>Forgot Login Credentials</b> .....	<b>12</b>
Patient Forgot Username or Password.....	12
Forgot Username .....	14
Forgot Password .....	16
Forgot Username or Password .....	20

## MyPatientVisit Patient Portal User Guide

### 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.

## LET'S CREATE YOUR ACCOUNT!

USERNAME (LOGIN ID):\*

PRACTICE ID\*

DATE OF BIRTH:\*

PASSWORD:\*

CONFIRM PASSWORD:\*

ZIP:\*

FIRST NAME:\*

LAST NAME:\*

SECURITY CODE:\*

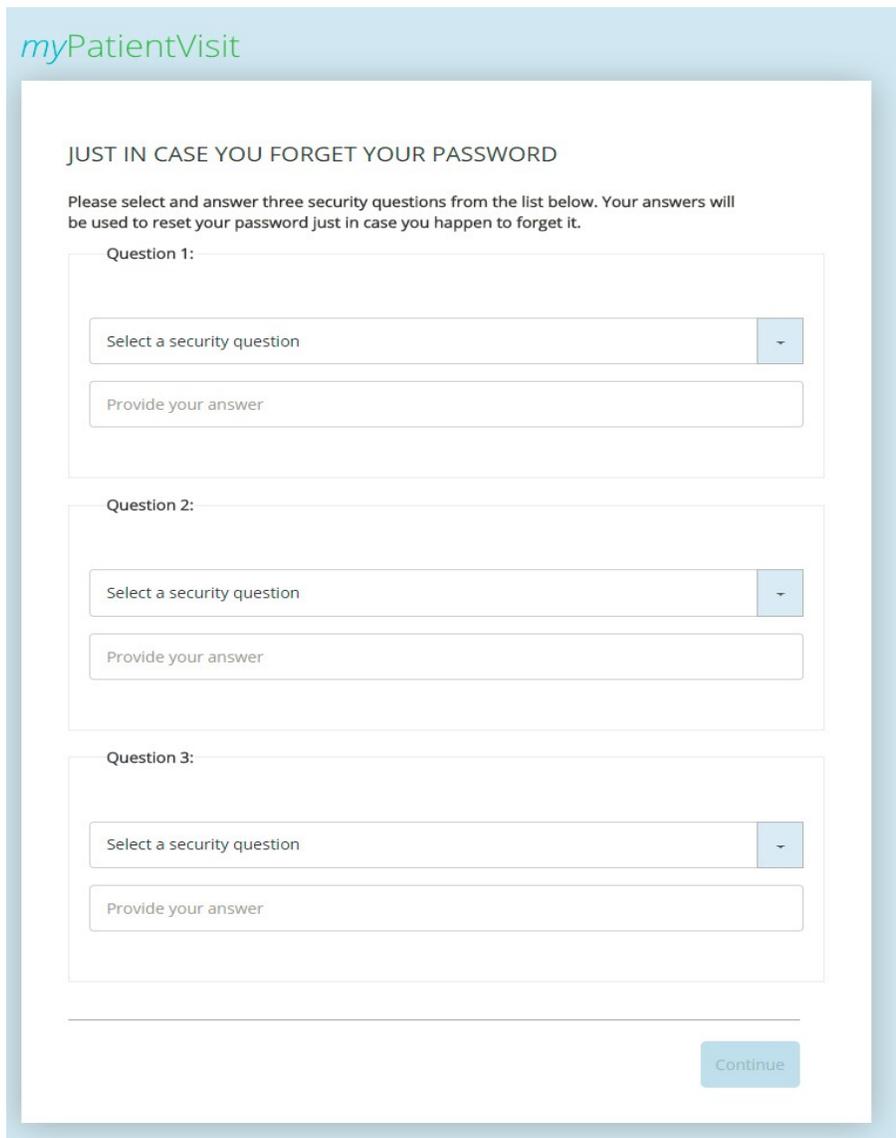
 I have read and understand the [Terms and Conditions](#)

\*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".

## MyPatientVisit Patient Portal User Guide



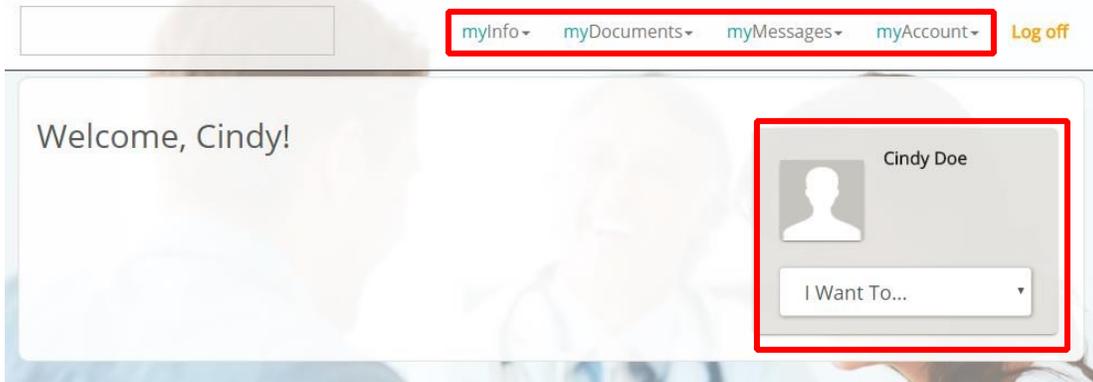
The screenshot shows the 'myPatientVisit' logo at the top left. Below it, the heading 'JUST IN CASE YOU FORGET YOUR PASSWORD' is centered. A paragraph of instructions follows: 'Please select and answer three security questions from the list below. Your answers will be used to reset your password just 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, there is a blue button labeled 'Continue'.

### Patient Portal Dashboard

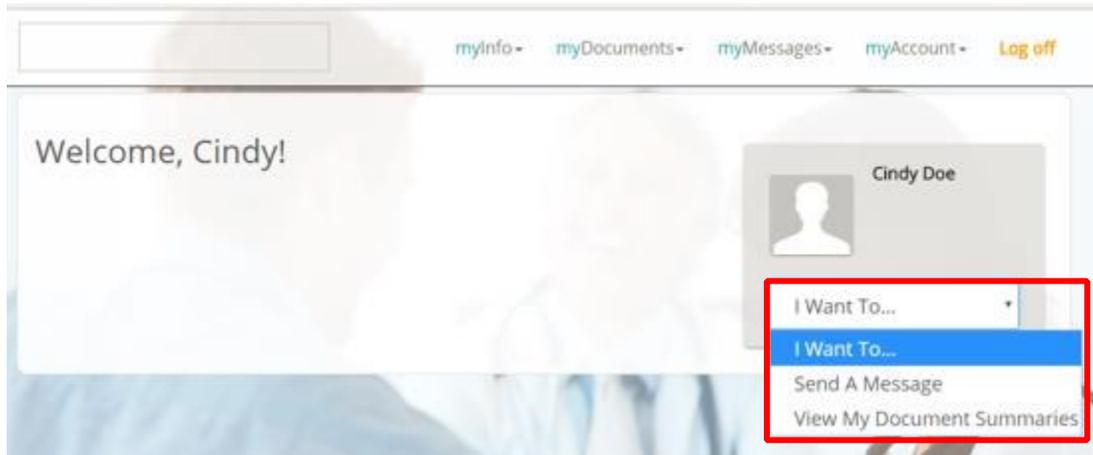
#### Patient's Dashboard

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



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.

### [Patient Documents View Access Details](#)

Patients can view the document access details by clicking on the “[View Access Details](#)” hyperlink.

## MyPatientVisit Patient Portal User Guide

### Clinical Summary Documents

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.

SELECT\_ALL

<i>Follow Up (Follow Up - Summary of Care)</i>	Date: 6/8/2012 Last Access: 3/19/2018 (by: Noestreich)	   	<input type="checkbox"/>
<a href="#">VIEW ACCESS DETAILS</a>			
<i>Follow Up (Follow Up - Summary of Care)</i>	Date: 4/18/2012 Last Access: 10/10/2014 (by: noestreich@vrssurgery.com)	   	<input type="checkbox"/>
<a href="#">VIEW ACCESS DETAILS</a>			
<i>Follow Up (Follow Up - Summary of Care)</i>	Date: 4/11/2012 Last Access: 10/10/2014 (by: noestreich@vrssurgery.com)	   	<input type="checkbox"/>
<a href="#">VIEW ACCESS DETAILS</a>			

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

#### Secure Email

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.

myInfo myDocuments myMessages myAccount Log off

Filter on:  To:

### Clinical Summary Documents

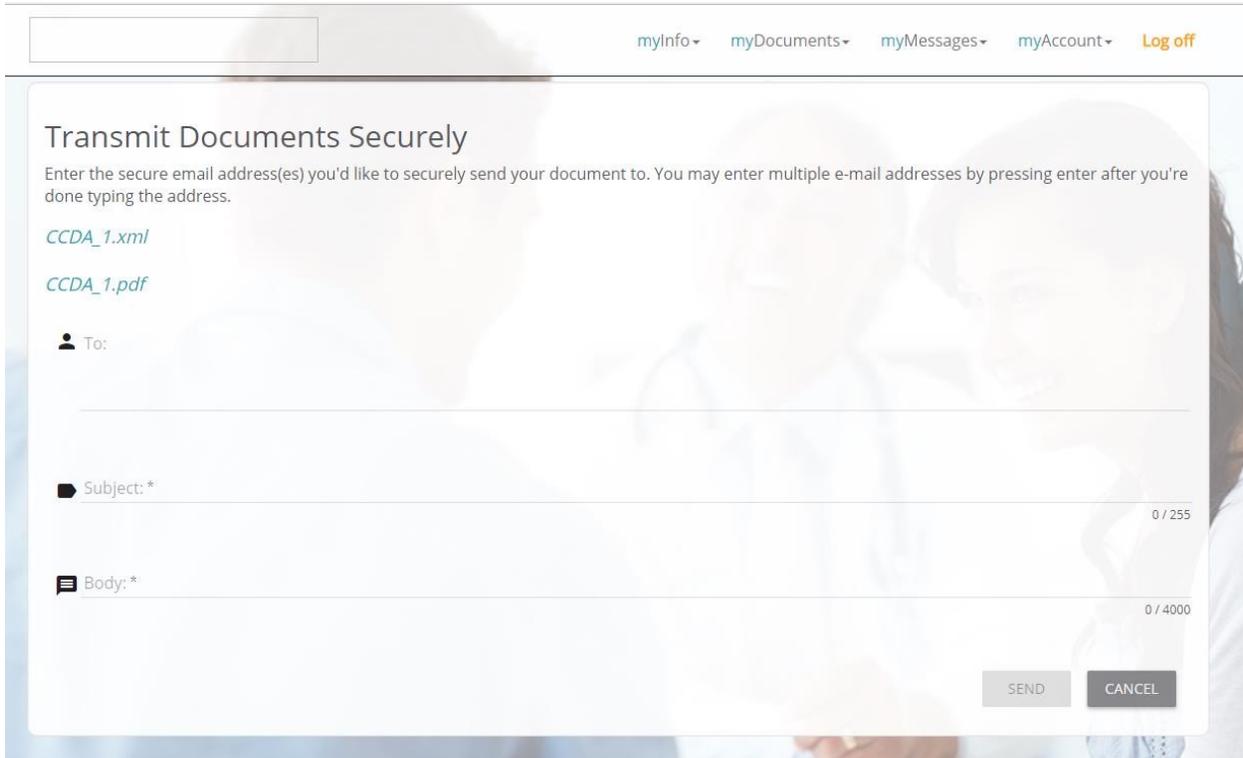
Below are the clinical summaries we have on file. You may view, download, securely transmit, and e-mail your clinical summaries by clicking the icons associated with each document.

Select all

<i>New Patient (New Patient - Summary of Care)</i>	Date: 2:03 PM Last Access: 1/1/0001 (by: )	   	<input type="checkbox"/>
<a href="#">VIEW ACCESS DETAILS</a>			

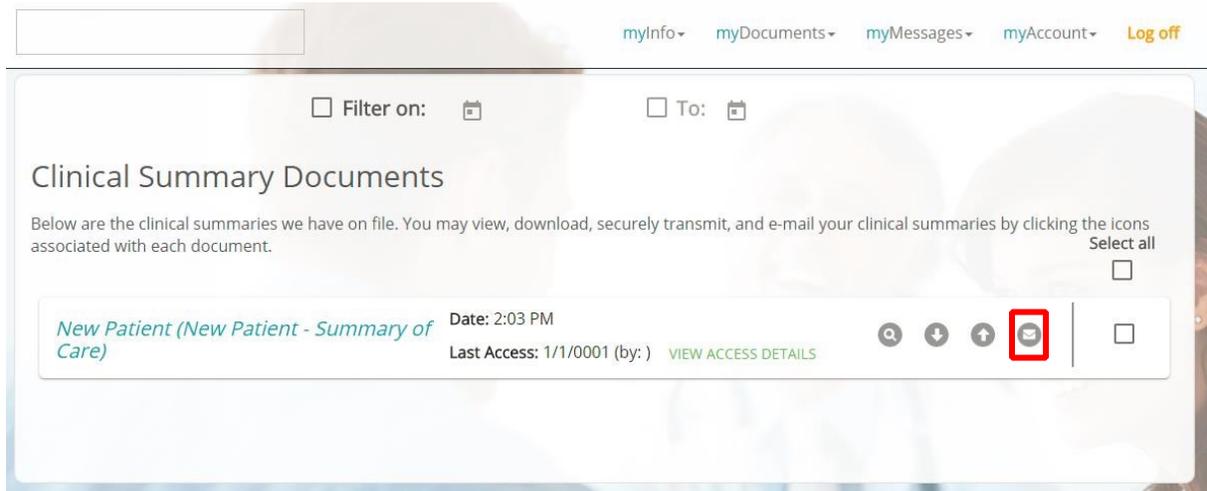
Enter the provider's secure email address in To, a Subject, and a message to the provider in the Body.

# MyPatientVisit Patient Portal User Guide



## Unencrypted Email

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.



## 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.

myInfo ▾ myDocuments ▾ myMessages ▾ myAccount ▾ Log off

### E-mail Your Document(s)

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.

**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.**

Documents to send:

- CCDA\_32.xml
- CCDA\_32.pdf

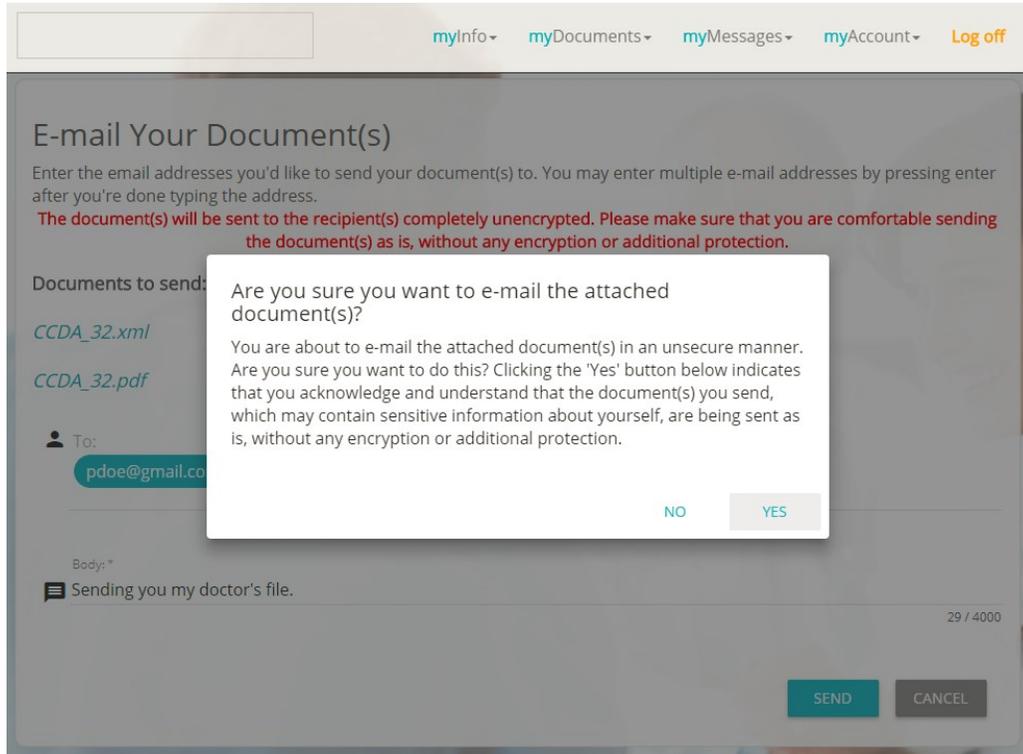
To:

Body: \* 0 / 4000

SEND CANCEL

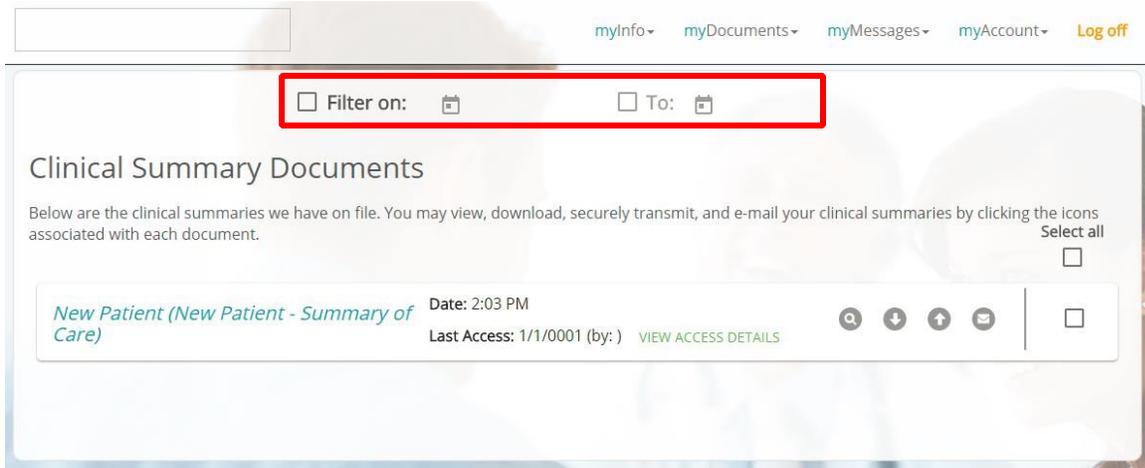
When the patient clicks the 'Send' button to send the email, a warning pop-up window is displayed and the user would have to manually click the "Yes" or "No" button to continue or cancel action.

## MyPatientVisit Patient Portal User Guide



### Ability to Filter on Summary of Care Documents

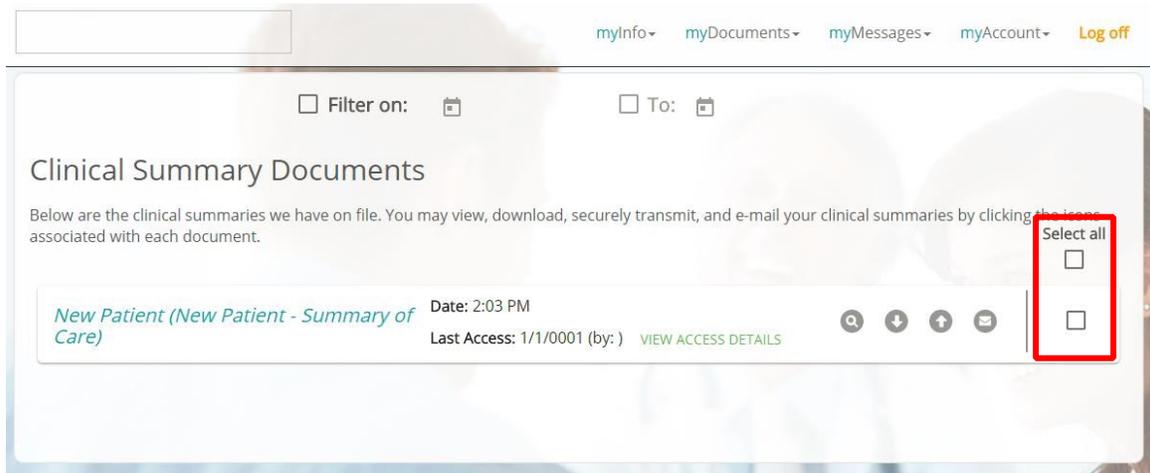
A patient can now filter on specific date or date range for their summary of care documents or patient documents that was published to them on the Patient Portal.



## MyPatientVisit Patient Portal User Guide

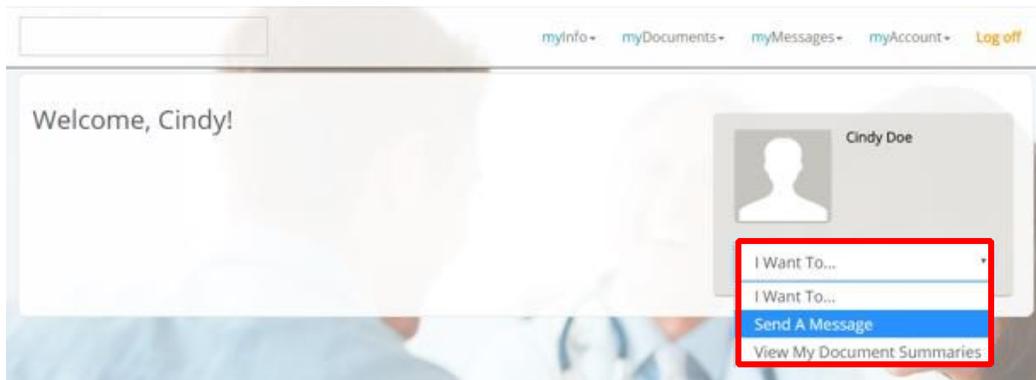
### Ability to Multi - Select Documents to View, Download, Transmit and email

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



### 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.

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.

## MyPatientVisit Patient Portal User Guide

### Send and review messages

PLEASE DO NOT LEAVE ANY EMERGENCY MESSAGES ON THIS PORTAL. If you have an urgent issue, please CALL our office, to have your questions answered. We will have the appropriate staff return calls on the same day. Messages left here may take up to 5 business days for a response. Thank you!!

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

 **Provider:** Dev, Sundeep, MD  
Date: 01/01/0001 12:00 AM

 **Provider:** Mitra, Robert A., MD  
Date: 01/01/0001 12:00 AM

 **Provider:** Johnson, Jill B., MD  
Date: 01/01/0001 12:00 AM

**Provider:** Johnson, Jill B., MD

 **Office**  
04/10/2018 2:33 PM  
It was our pleasure!!

 **Me**  
04/10/2018 2:31 PM  
Thank you Dr. Johnson for seeing me yesterday.

Reply to thread:



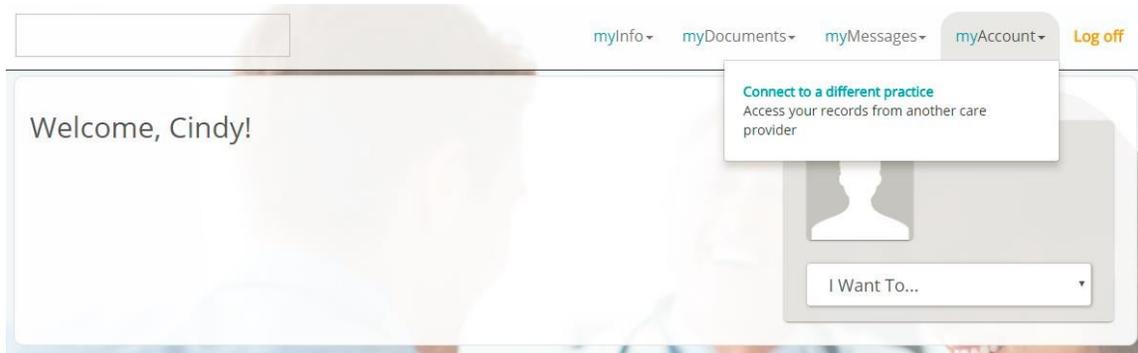
0 / 4000

SEND

CANCEL

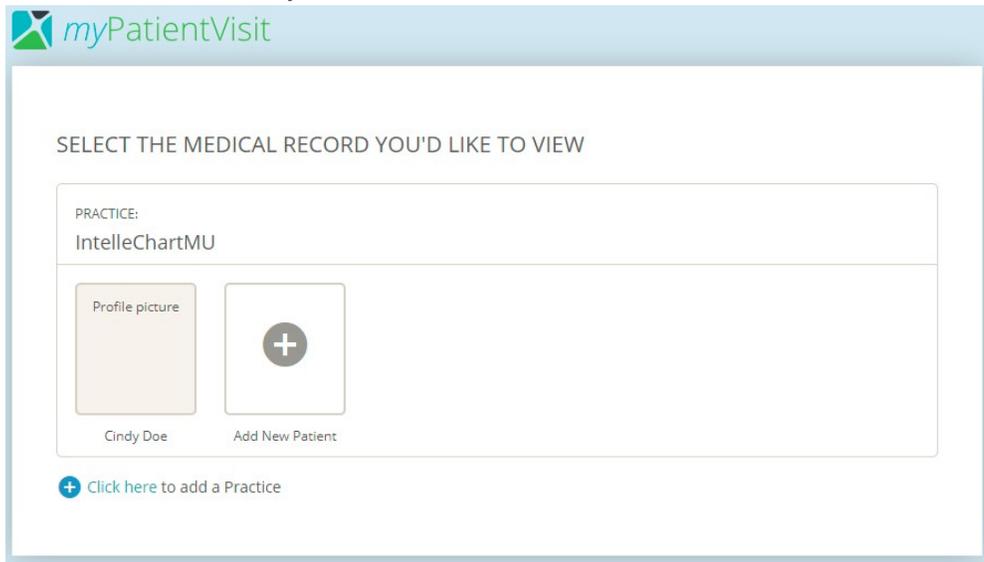
### Connecting to another practice

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.



The screenshot shows the top navigation bar of the MyPatientVisit patient portal. The navigation items are: myInfo, myDocuments, myMessages, myAccount, and Log off. The 'myAccount' dropdown menu is open, displaying the option 'Connect to a different practice' with the subtext 'Access your records from another care provider'. Below this option is a dropdown menu labeled 'I Want To...'.

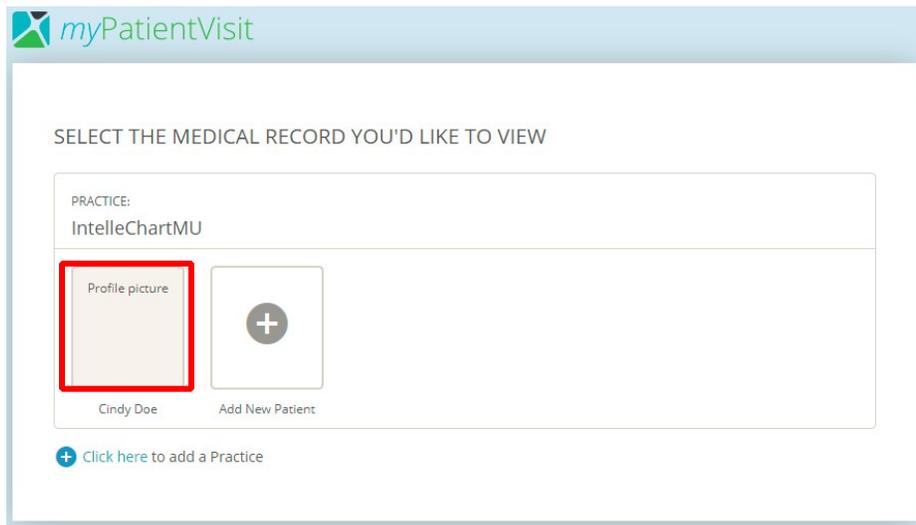
## MyPatientVisit Patient Portal User Guide



### 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.



### 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.

## MyPatientVisit Patient Portal User Guide

myPatientVisit

WELCOME, PLEASE LOG-IN  
Log-in with the information you used when you registered.

Enter Username

Password

Remember Me

Login

[Need help with your login?](#)

DON'T HAVE AN ACCOUNT?  
Create an account

Or please contact your practice for access to the portal.

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

## MyPatientVisit Patient Portal User Guide

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:\* Enter

LAST NAME:\* Enter

DATE OF BIRTH:\* mm/dd/yyyy

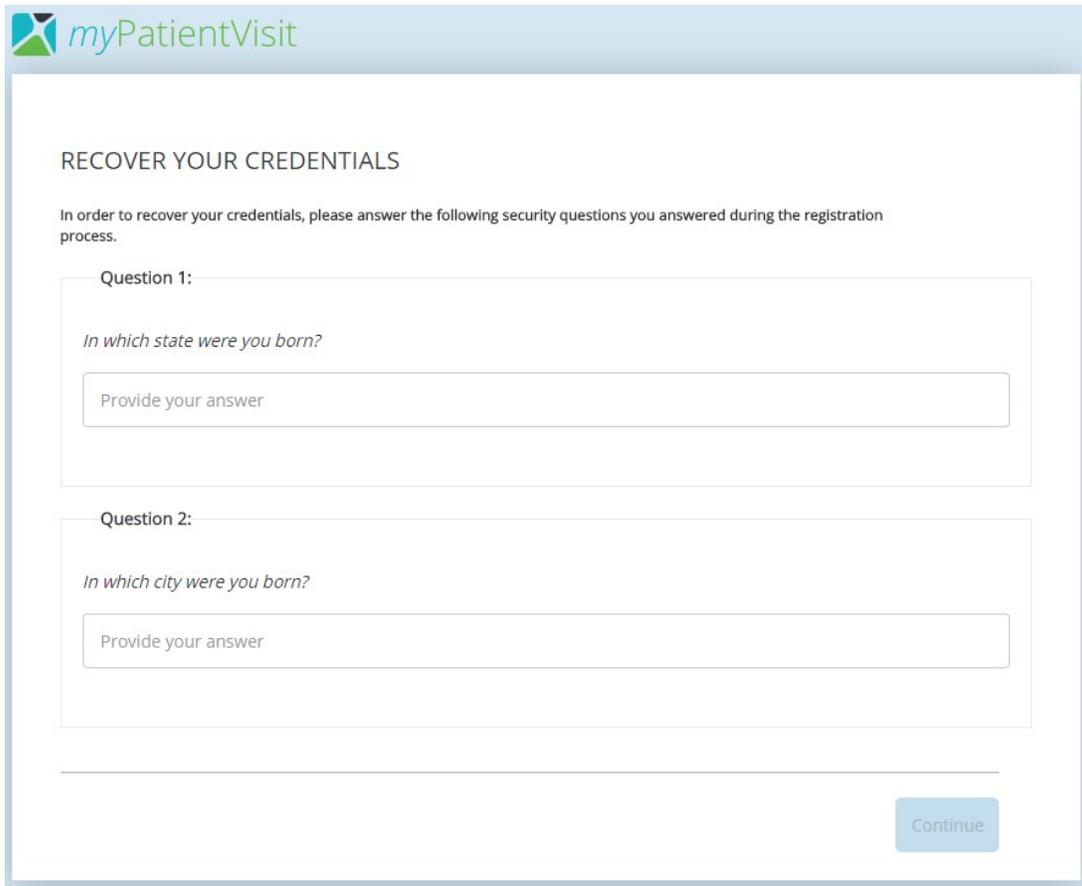
ZIP:\* Enter

\*Required field

Submit Cancel

## MyPatientVisit Patient Portal User Guide

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:**

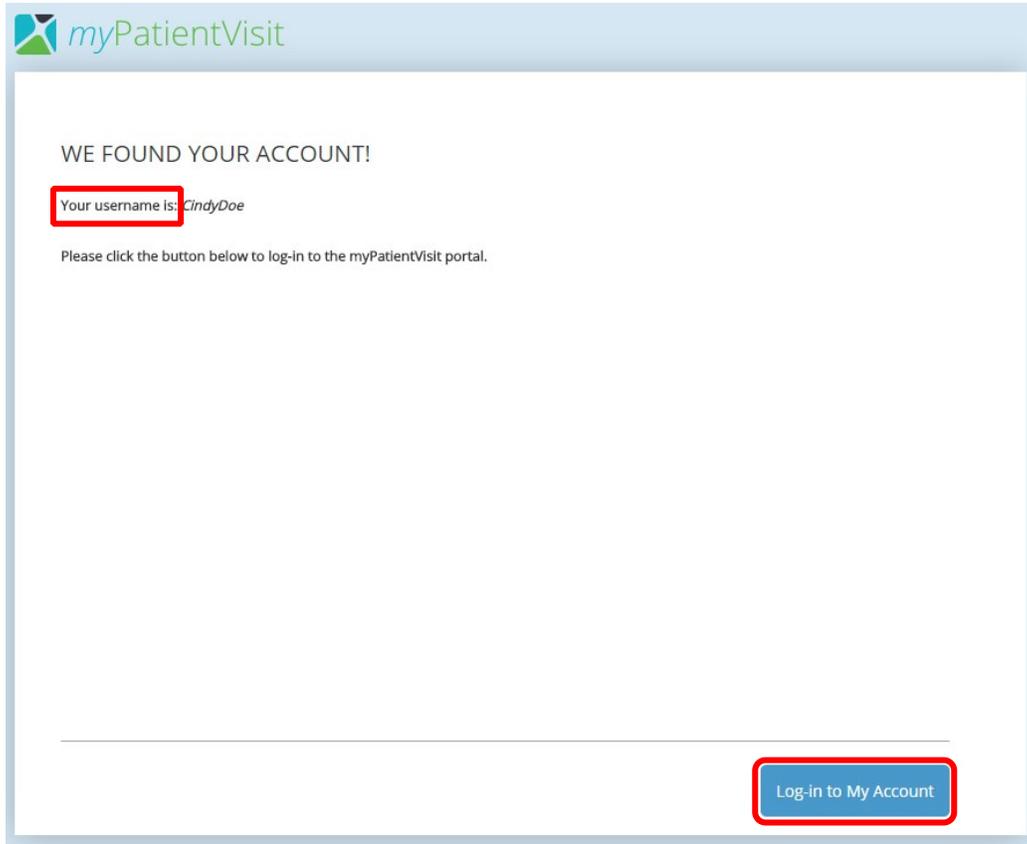
*In which city were you born?*

Provide your answer

Continue

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

## MyPatientVisit Patient Portal User Guide



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

FORGOT LOGIN CREDENTIALS?

Please select one from below.

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

FIRST NAME:\*

LAST NAME:\*

USERNAME (LOGIN ID):\*

DATE OF BIRTH:\*

ZIP:\*

*\*Required field*

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 Patient Portal User Guide

**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:**

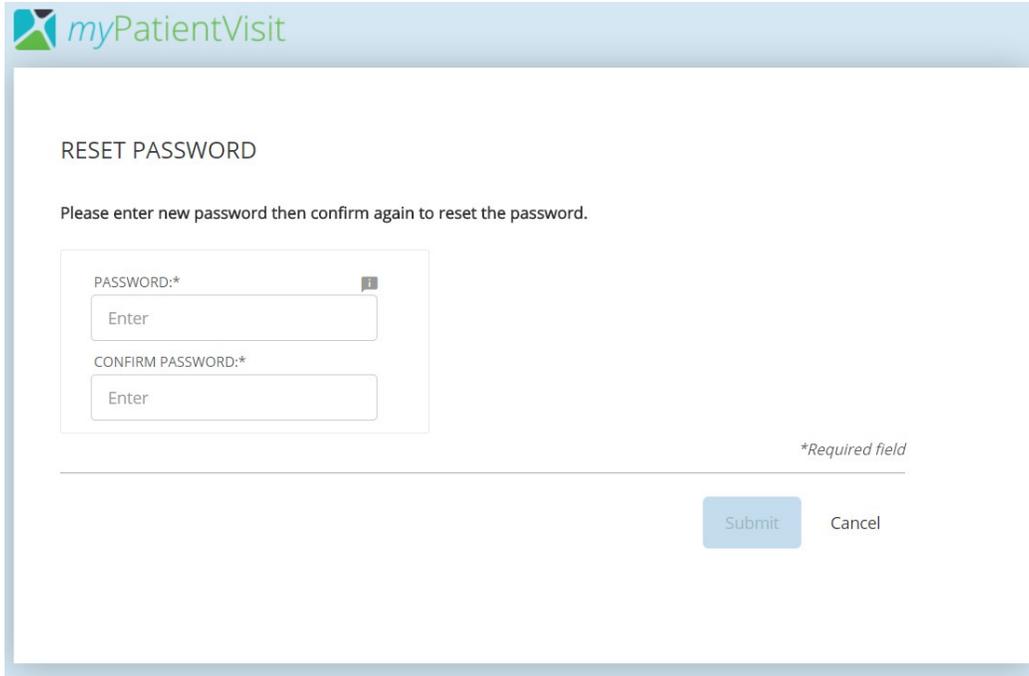
*In which city were you born?*

Provide your answer

Continue

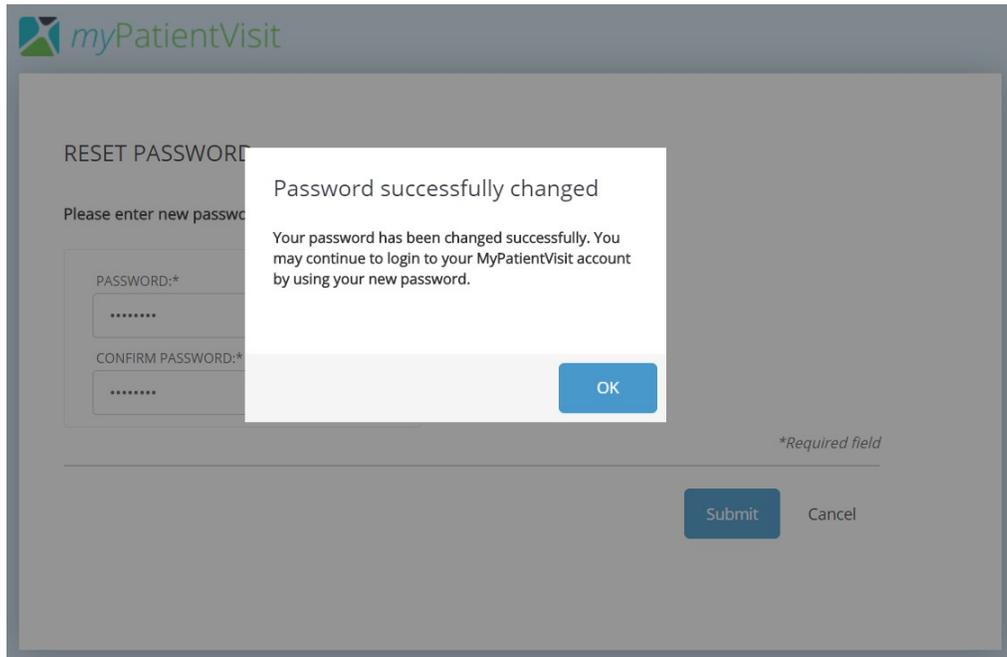
If the correct information is entered, MyPatientVisit will allow the patient to reset their password.

## MyPatientVisit Patient Portal User Guide



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:\*', both containing the placeholder text 'Enter'. A small red '1' icon is next to the first field. At the bottom right, there is a '\*Required field' label. Below the fields are two buttons: 'Submit' and 'Cancel'.

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



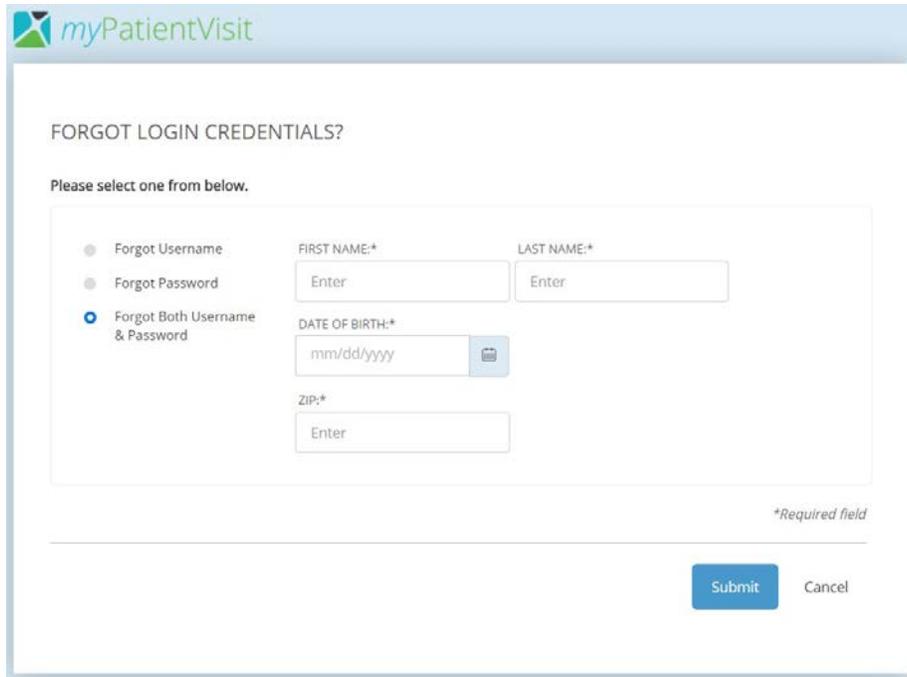
This screenshot shows the same 'RESET PASSWORD' form as above, but with a modal dialog box overlaid in the center. The dialog has a white background and a blue border. The title is 'Password successfully changed'. The text inside reads: 'Your password has been changed successfully. You may continue to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

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

### 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 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:

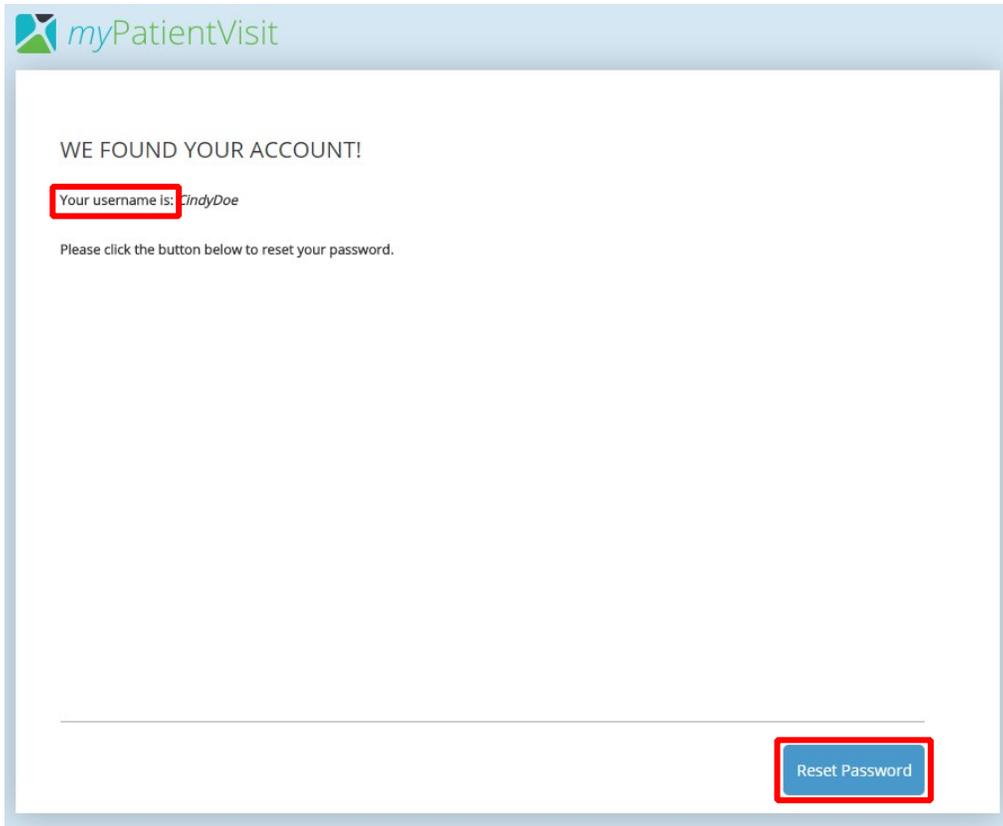
*In which city were you born?*

Provide your answer

Continue

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

## MyPatientVisit Patient Portal User Guide



myPatientVisit

WE FOUND YOUR ACCOUNT!

Your username is: *JIndyDoe*

Please click the button below to reset your password.

Reset Password

This screenshot shows the account recovery page. At the top left is the myPatientVisit logo. The main heading is "WE FOUND YOUR ACCOUNT!". Below this, the text "Your username is: JIndyDoe" is displayed, with "JIndyDoe" in italics. A red box highlights the text "Your username is:". Below the username, the instruction "Please click the button below to reset your password." is shown. At the bottom right of the page, there is a blue button labeled "Reset Password", which is also highlighted with a red box.

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



myPatientVisit

RESET PASSWORD

Please enter new password then confirm again to reset the password.

PASSWORD:\*  
Enter

CONFIRM PASSWORD:\*  
Enter

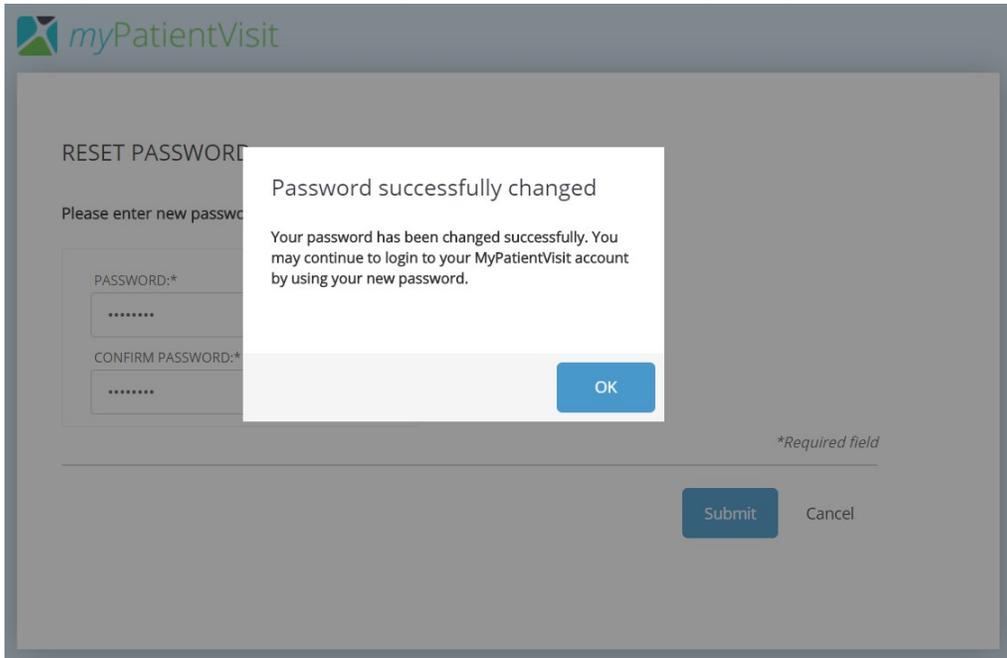
\*Required field

Submit Cancel

This screenshot shows the password reset page. At the top left is the myPatientVisit logo. The main heading is "RESET PASSWORD". Below this, 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 fields have "Enter" as a placeholder and a red asterisk icon to their right. Below the input fields, the text "\*Required field" is displayed. At the bottom right of the page, there are two buttons: "Submit" and "Cancel". The "Submit" button is highlighted with a red box.

## MyPatientVisit Patient Portal User Guide

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.