MyPatientVisit
Patient Portal User Guide

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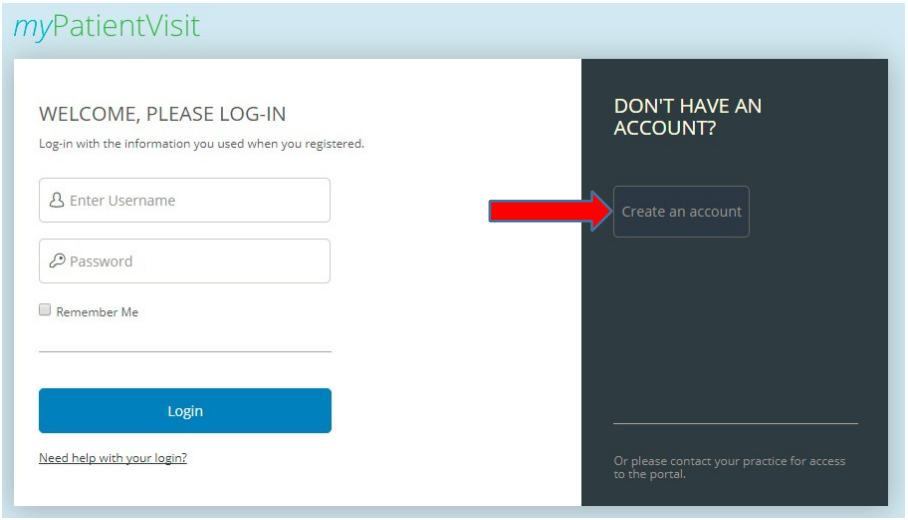
Patient Setup and Login to the Patient Portal

Patient Registration

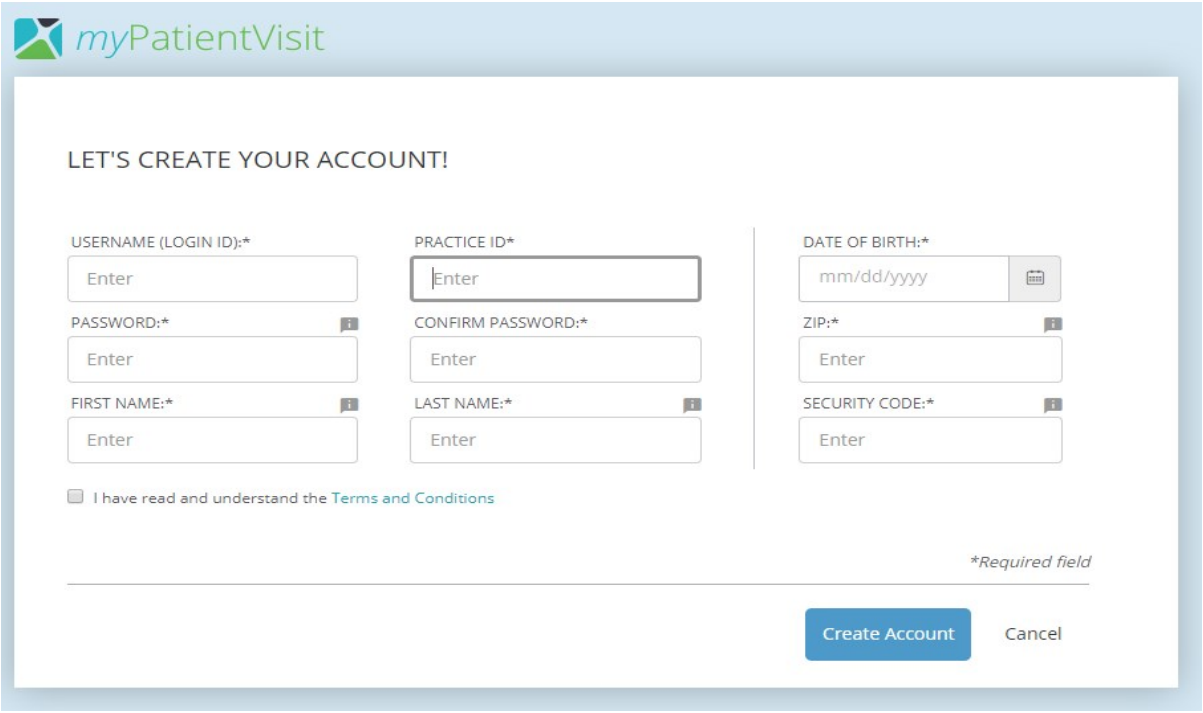
The first time a patient goes to MyPatientVisit, they will need to create an account using the information on the document provided from the provider's practice.



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:

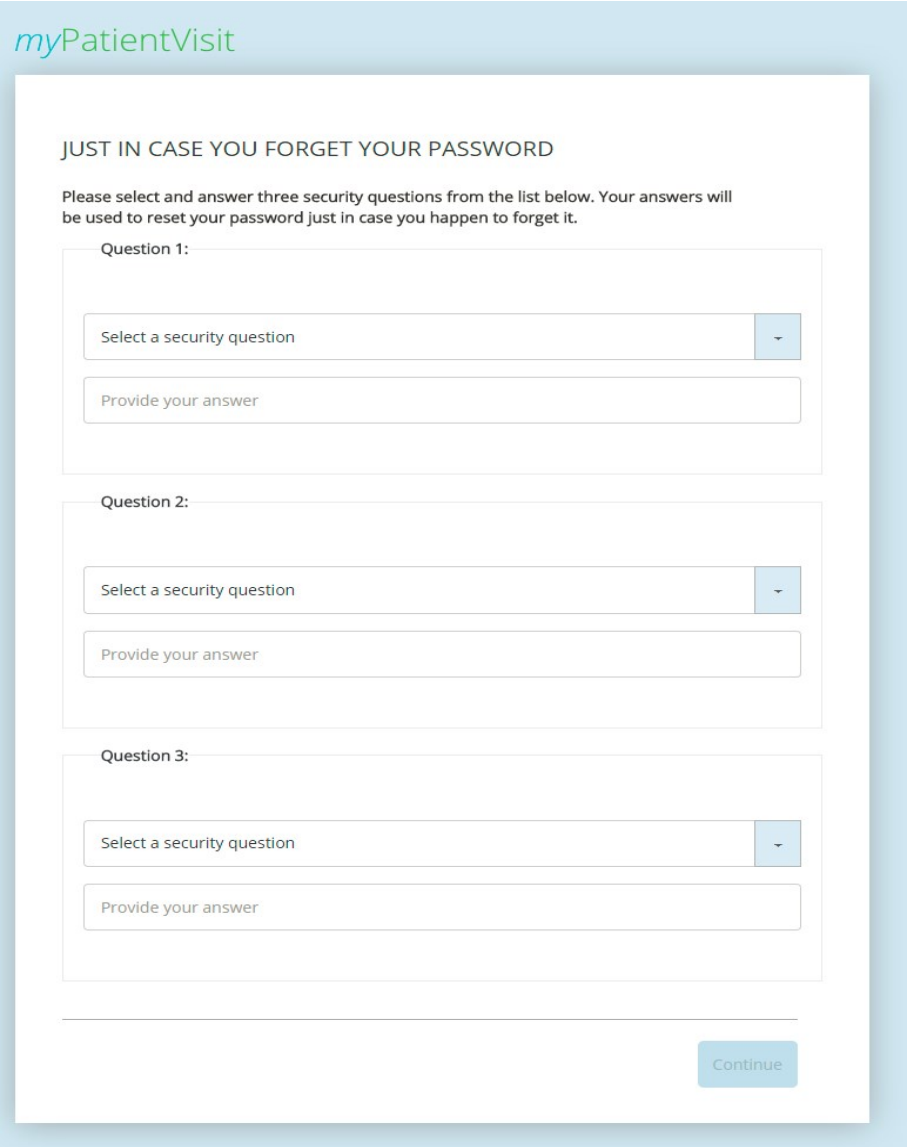
- At least 1 uppercase character (A through Z)
- At least 1 lowercase character (a through z)
- At least 1 numeric digit (0-9)
- At least 1 special character (~!@#$%^&*;?+_)

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.



Security Questions

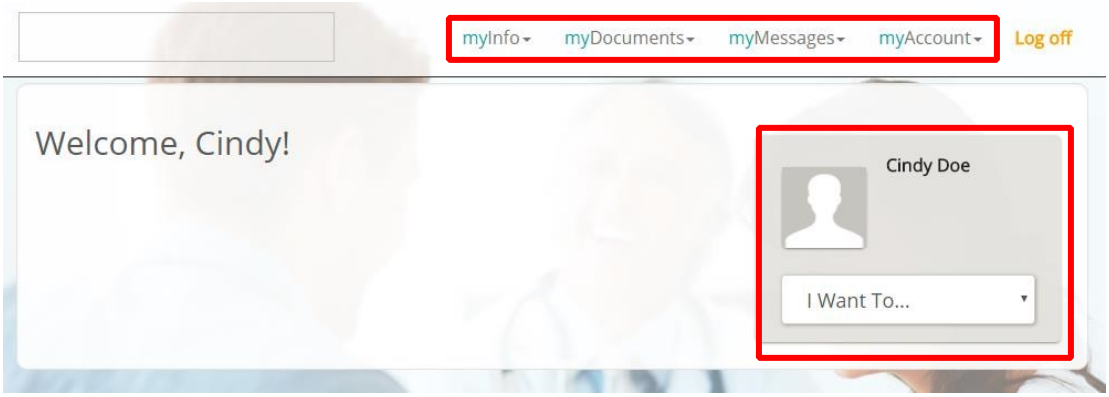
Patients will next be asked to select 3 security questions to be used if they forgot their password. Select a security question from each of the drop downs, then type the answer in the box labeled “Provide your answer”.



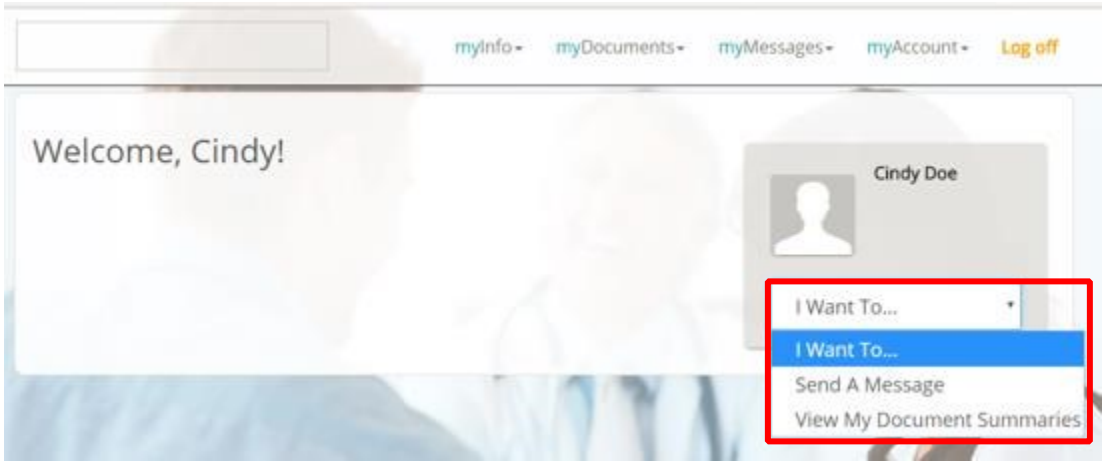
Patient Portal Dashboard

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.



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

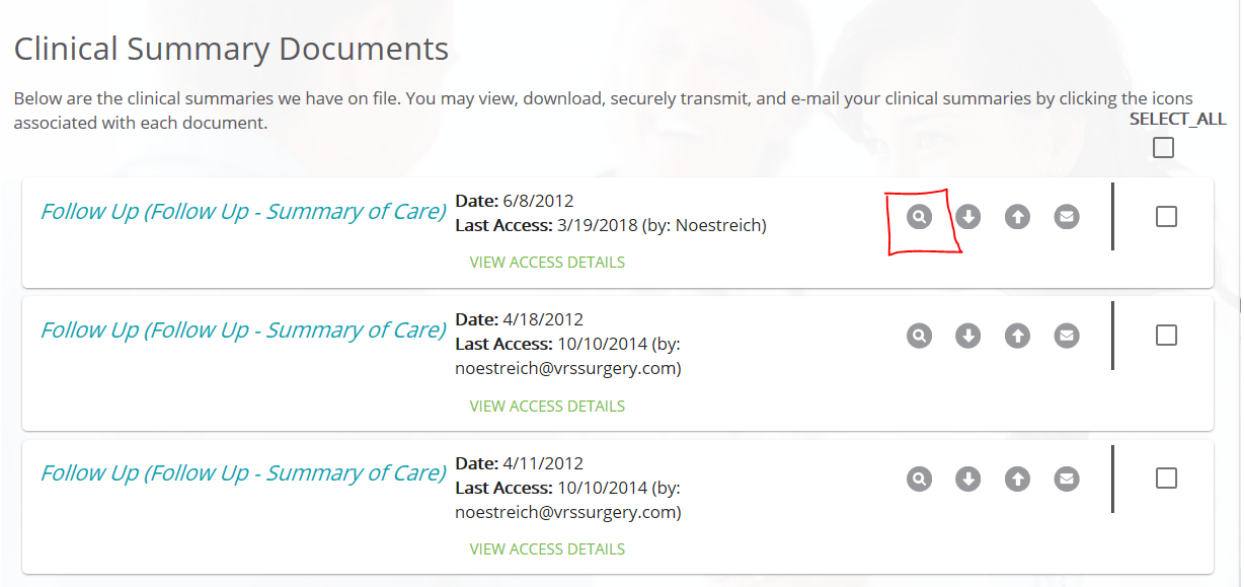


Patient Documents in myDocuments View

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.

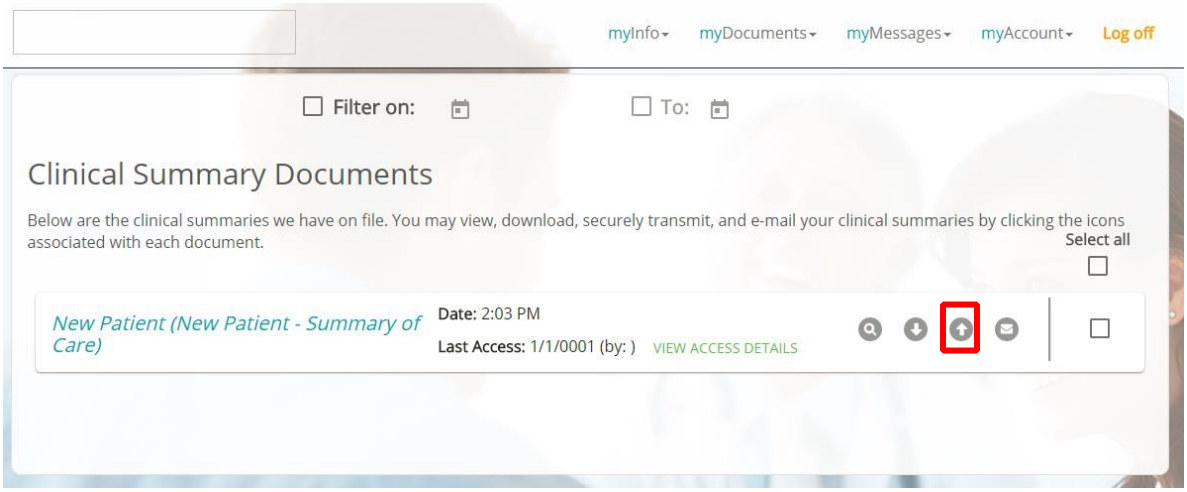
Patient Documents View Access Details

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

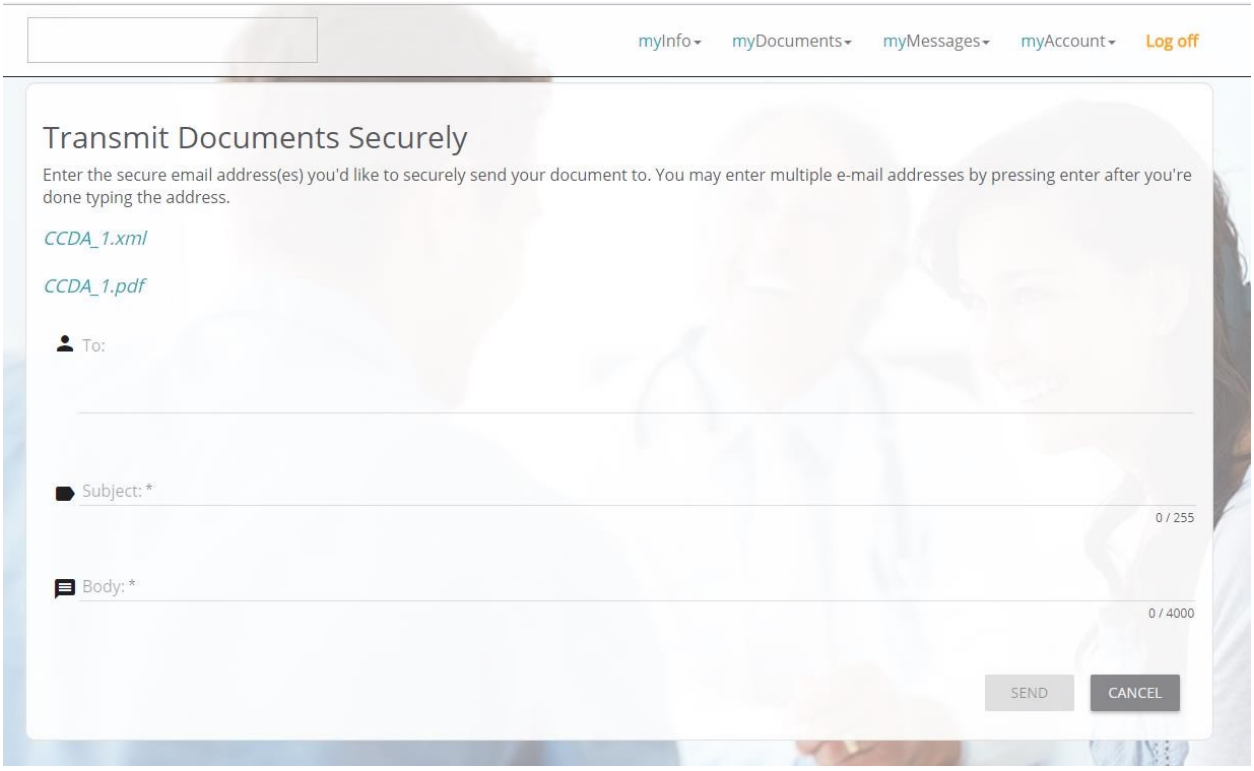


E-Mail Clinical Summary & Patient Documents through the Patient Portal Secure Email

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.

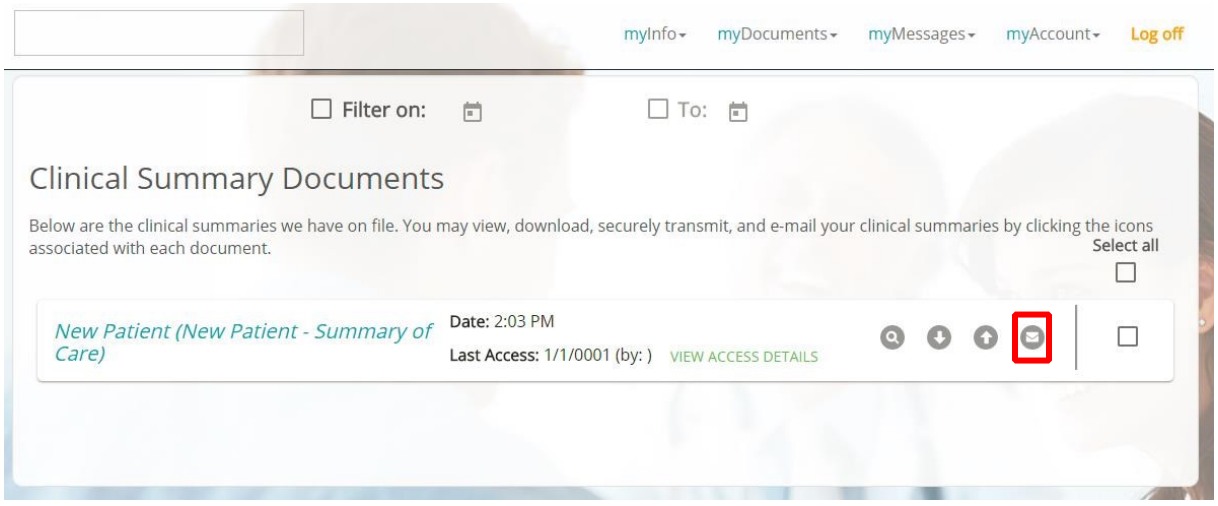


Enter the provider's secure email address in To, a Subject, and a message to the provider in the Body.



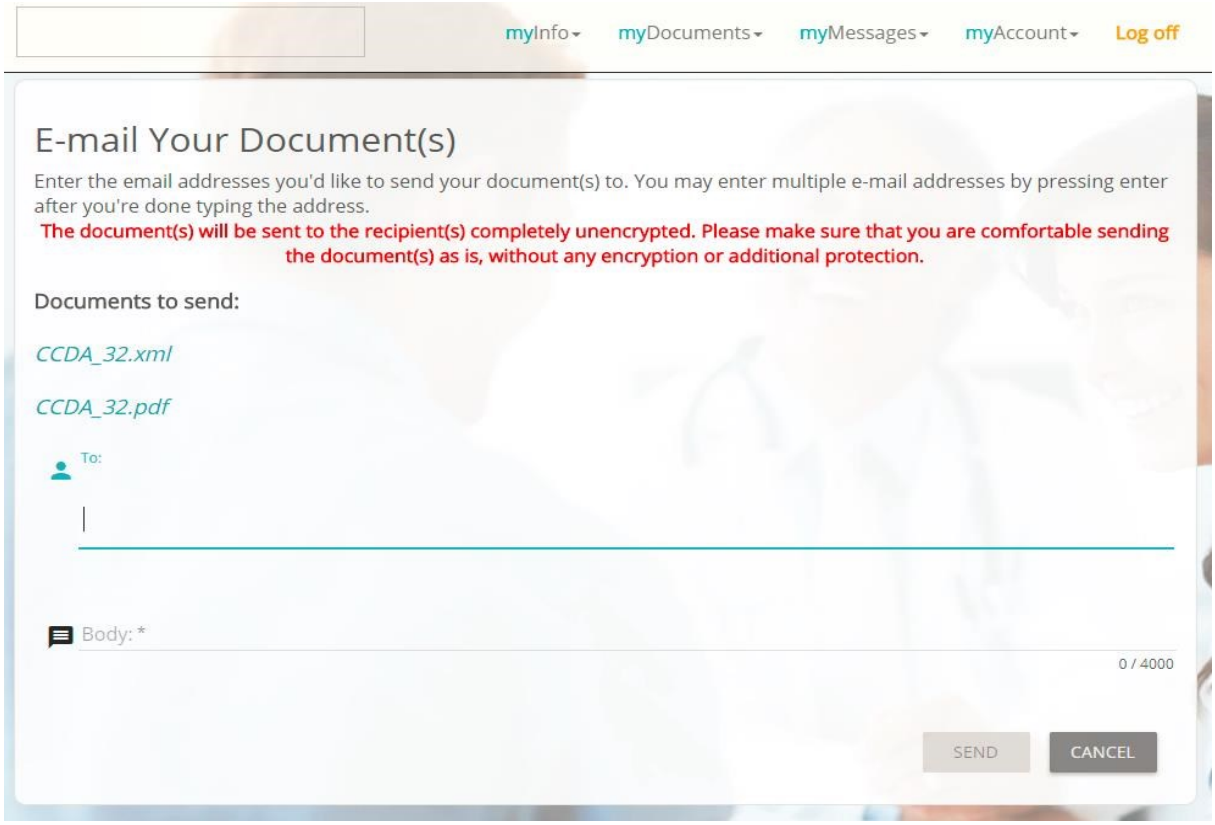
Unencrypted Email

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.

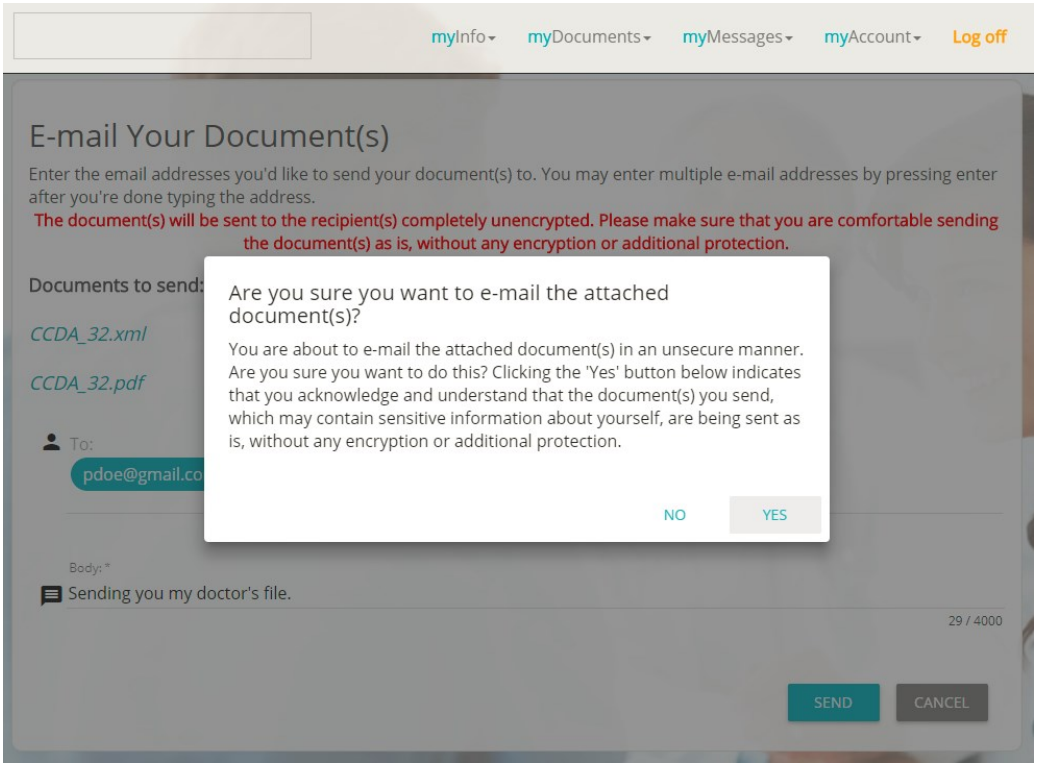


Unencrypted Email Warning Messages

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

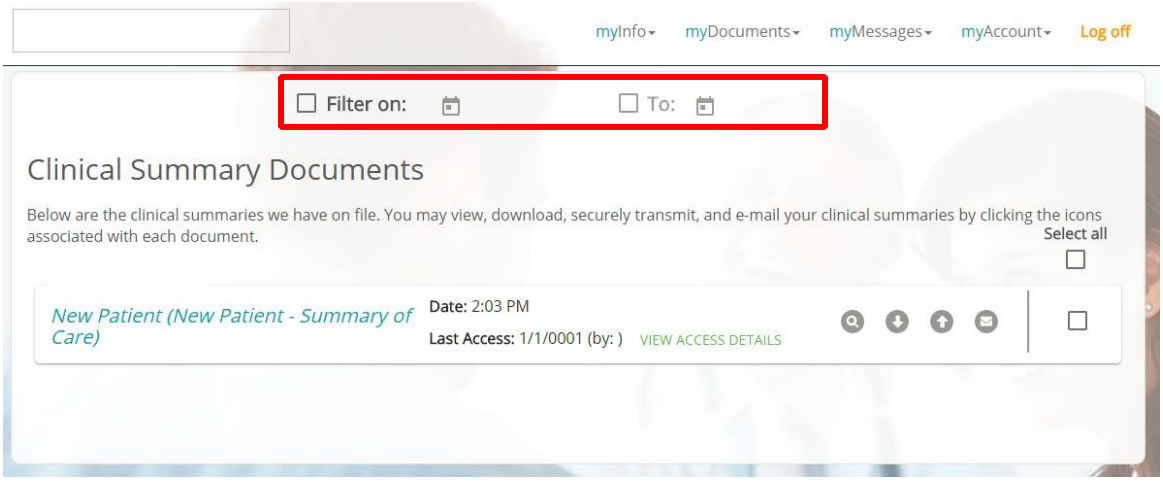


When the patient clicks the 'Send' button to send the email, a warning pop-up window is displayed and the user would have to manually click the "Yes" or "No" button to continue or cancel action.



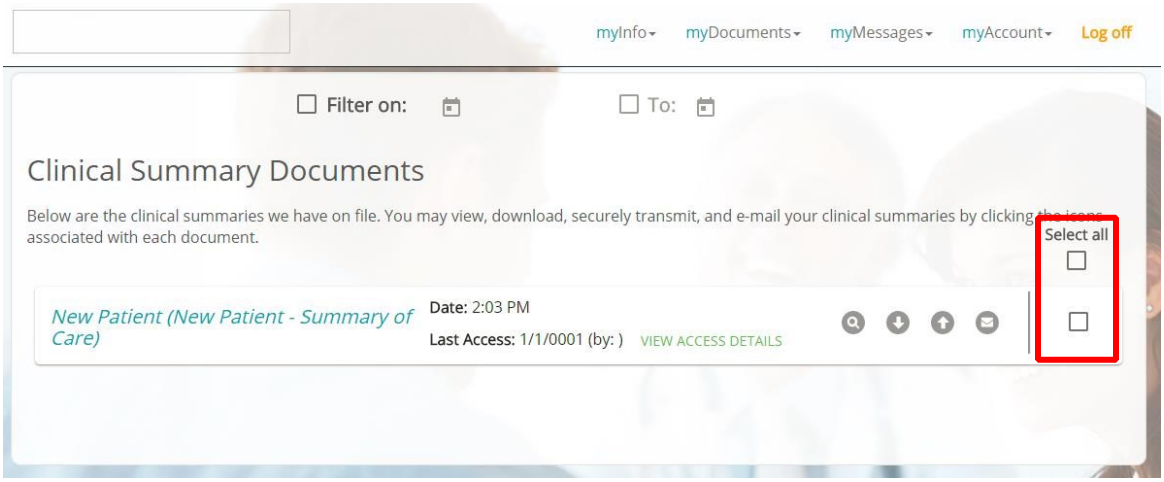
Ability to Filter on Summary of Care Documents

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.



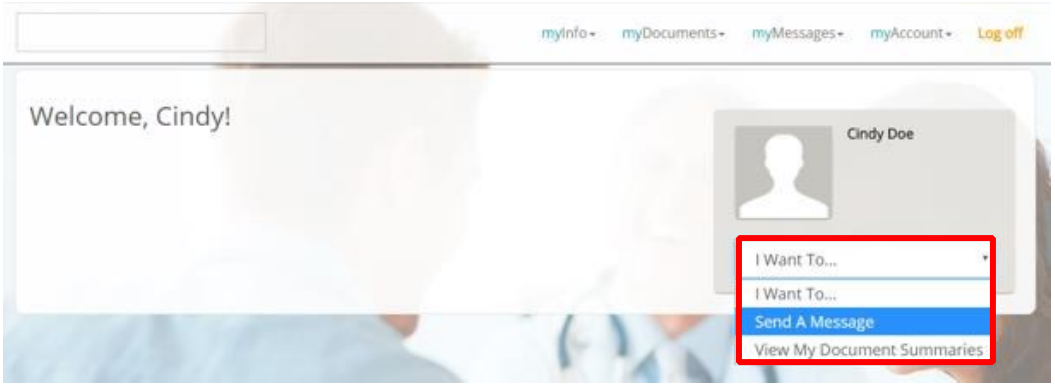
Ability to Multi - Select Documents to View, Download, Transmit and email

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



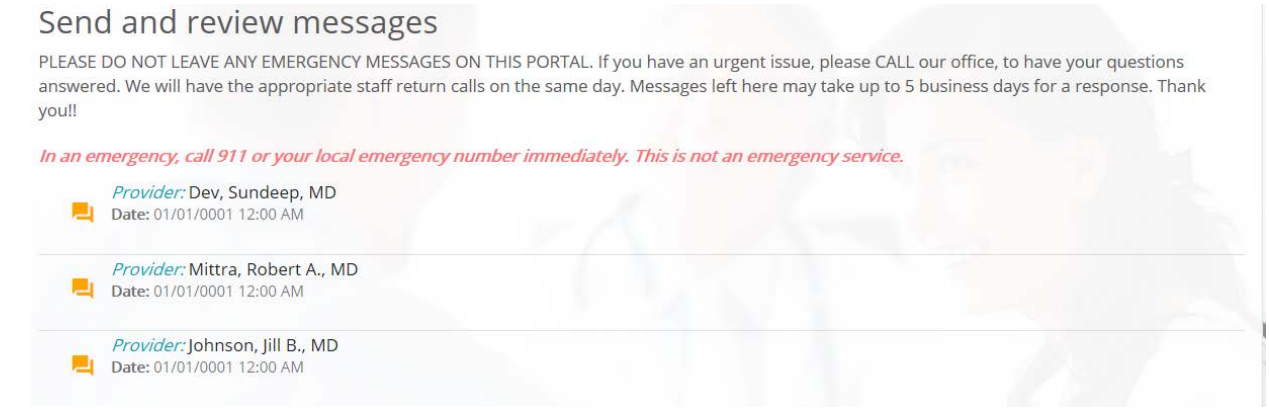
Send a Message

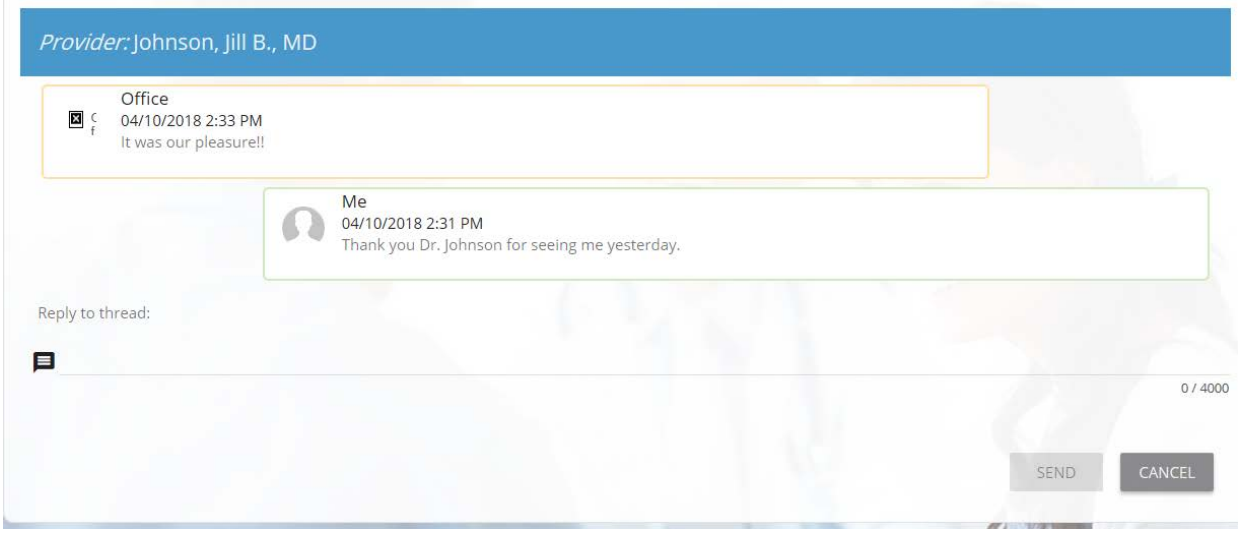
Patients can send a secure message to any of their providers. From the dashboard, click on “I Want To …” dropdown and select “Send A Message”.



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

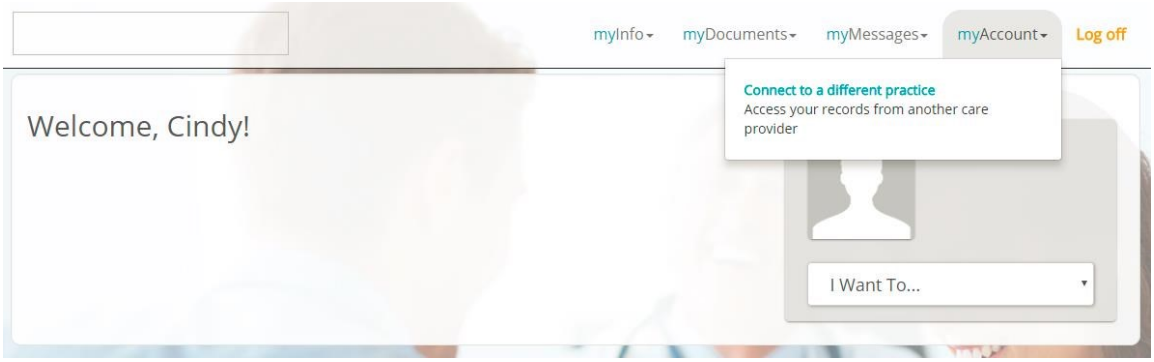
The patient can read secure messages from that provider or send a secure message to that provider by typing the message then selecting the “Send” button.

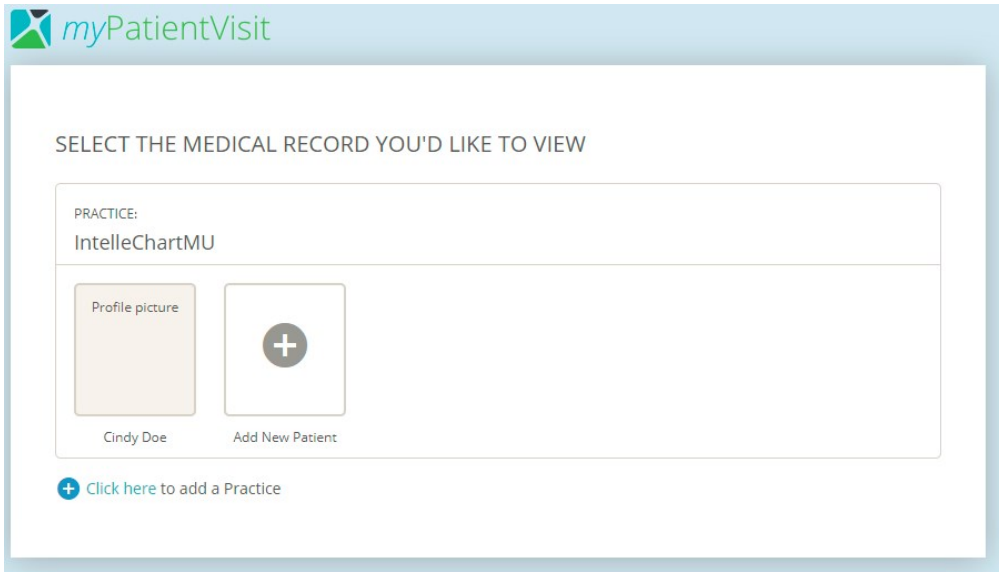




Connecting to another practice

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.

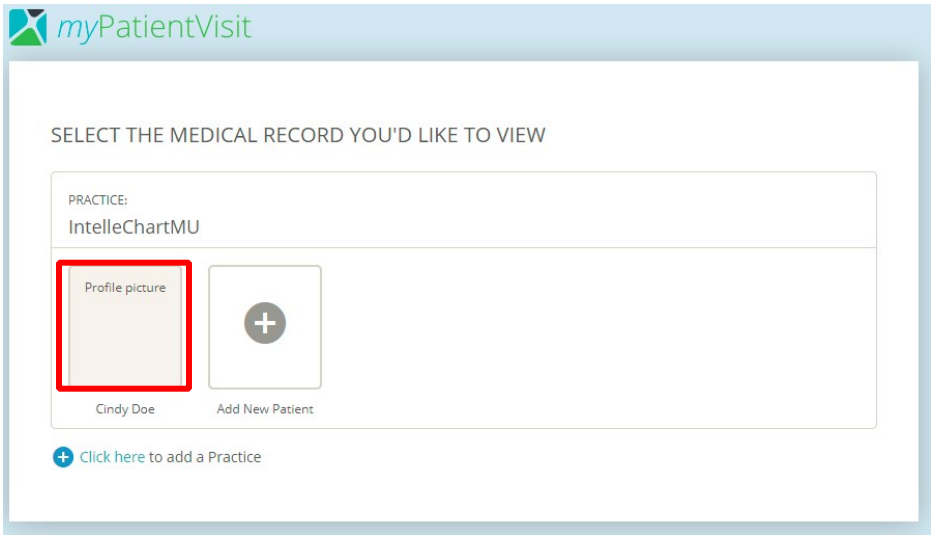




Subsequent Patient Login

Patient Login

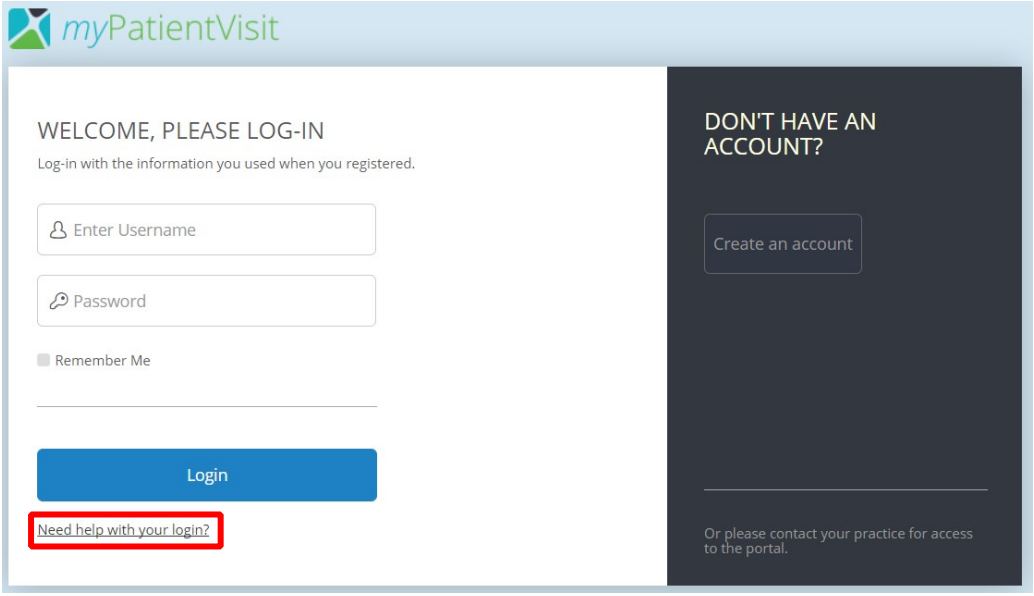
When the patient logs in subsequently after the initial registration, they will need to click on the box above their name to access their documents.



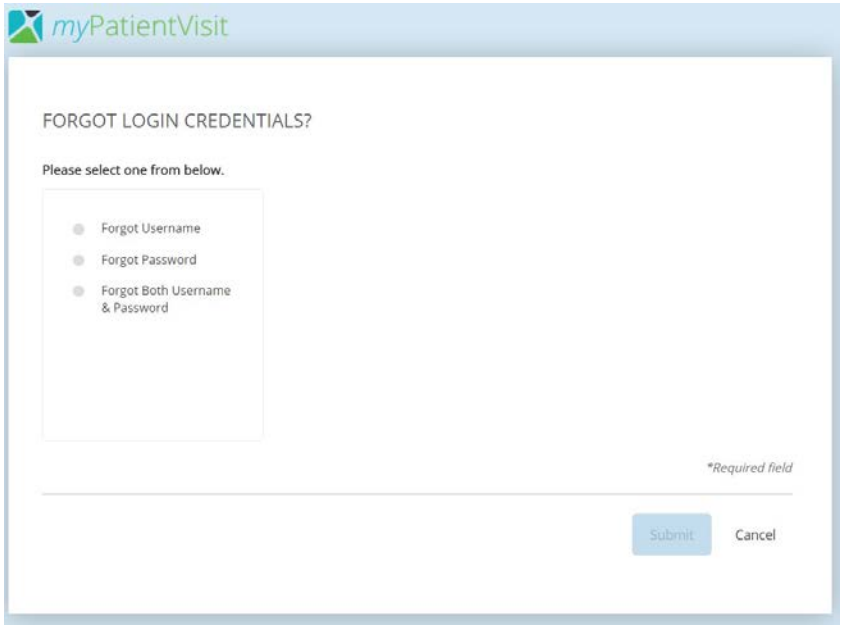
Forgot Login Credentials

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.

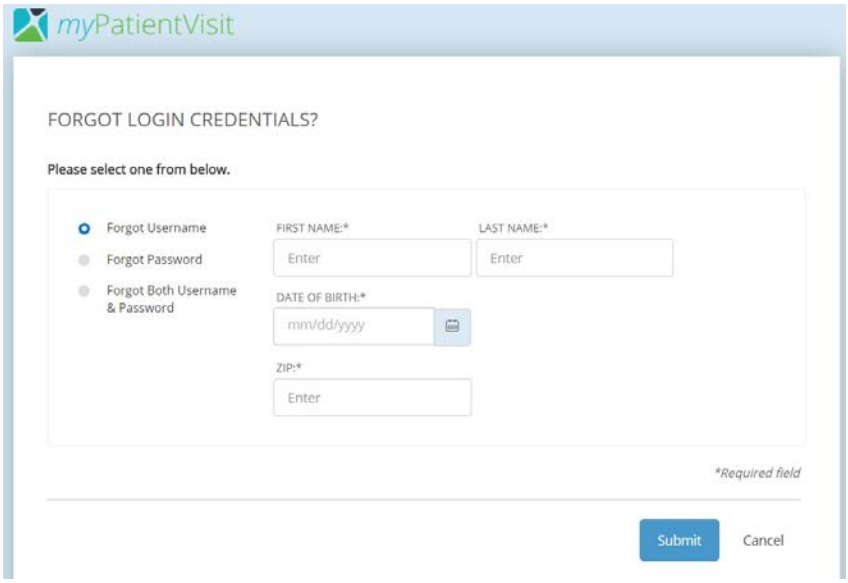


The patient will be able to select Username, Password or both to recover their credentials.

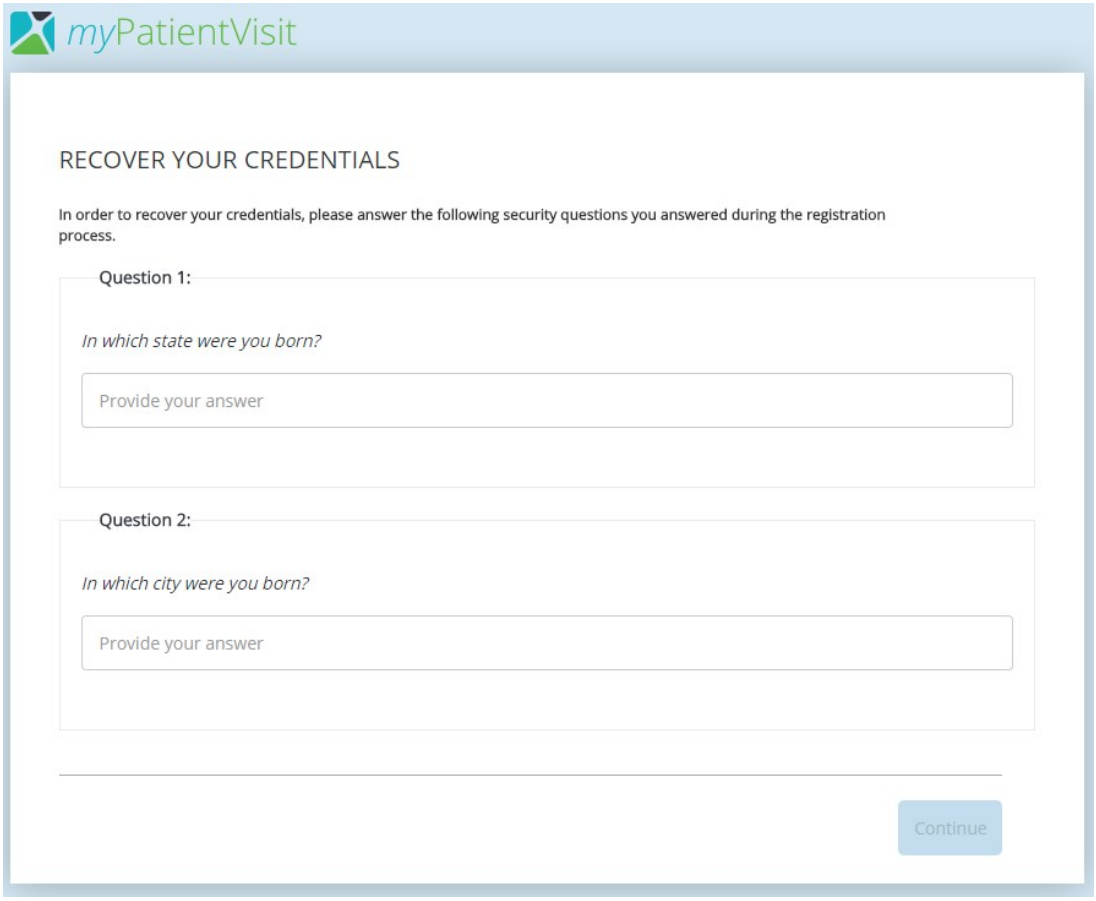


Forgot Username

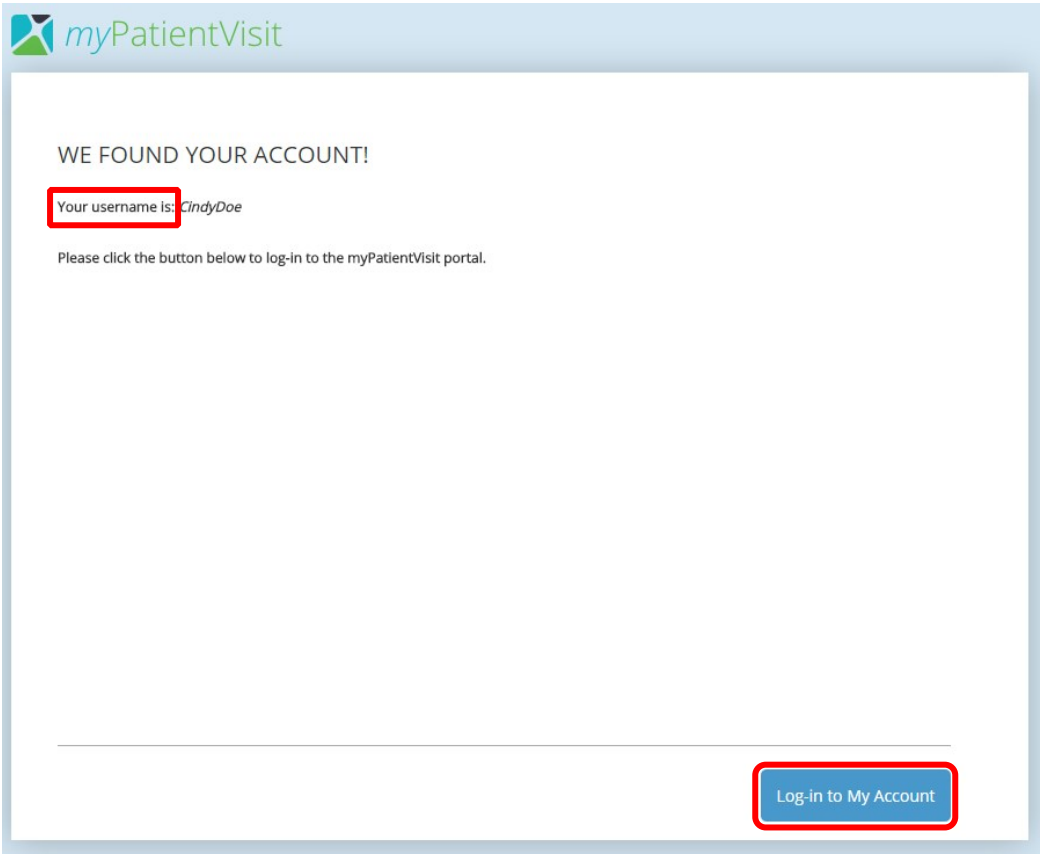
When the patient selects “Forgot Username”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.



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



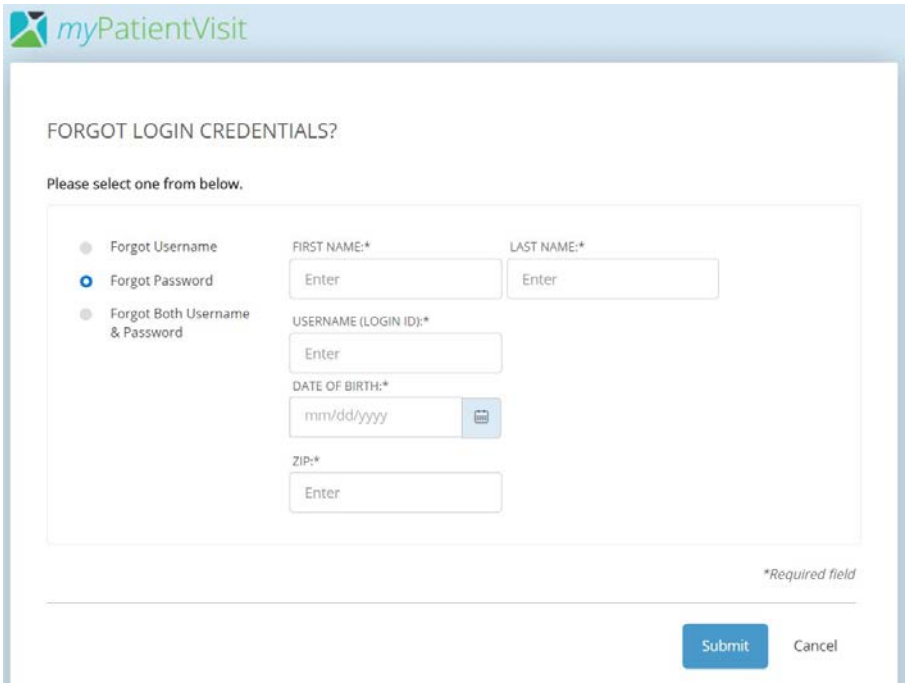
If the correct information is entered, the patient's username will be displayed. The patient will then click on "Log-in to My Account".



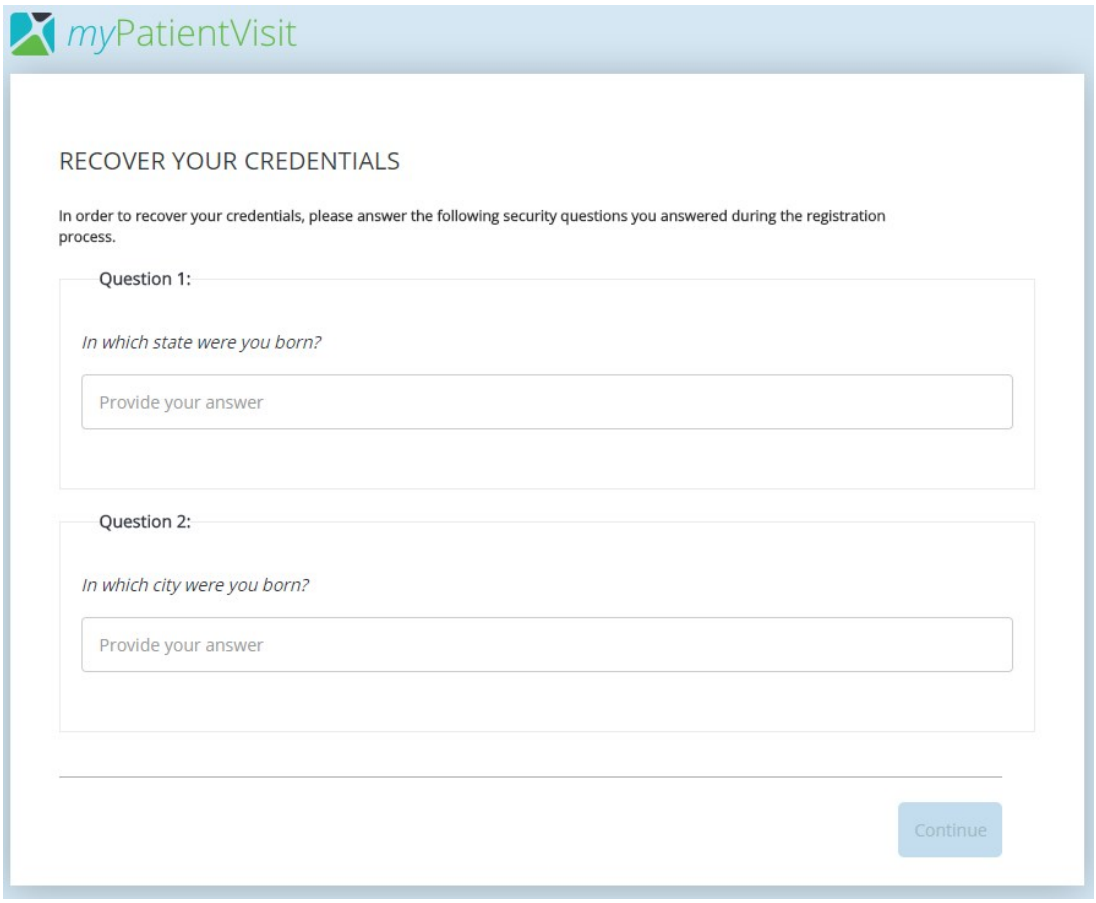
The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

Forgot Password

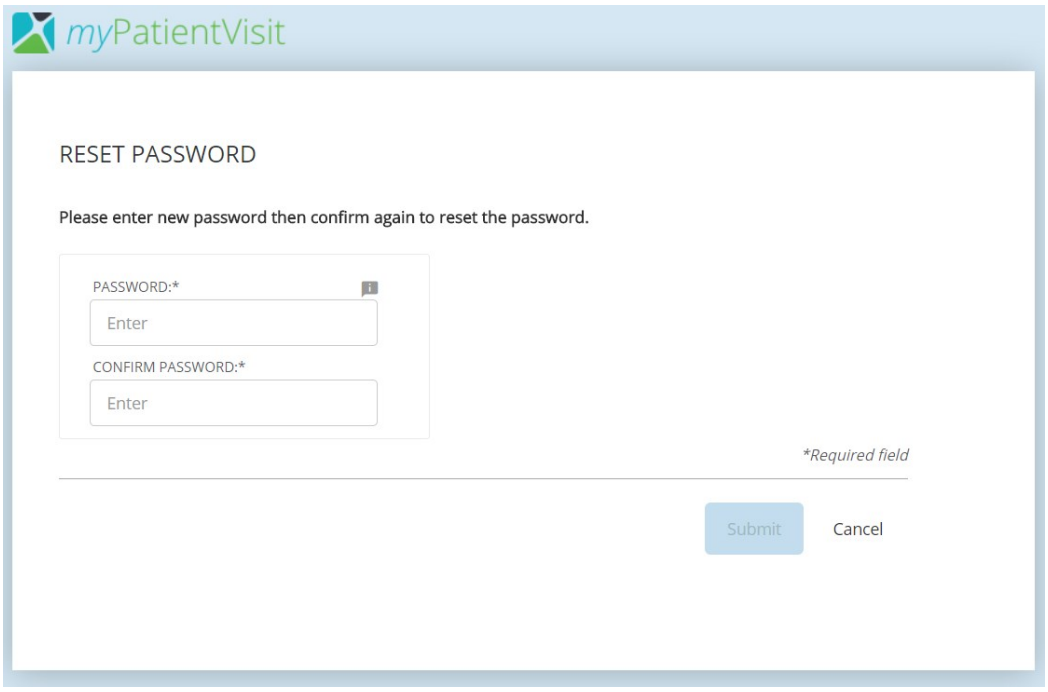
When the patient selects “Forgot Password”, they will be asked to enter their First Name, Last Name, Username, Date of Birth and Zip they used to create their login.



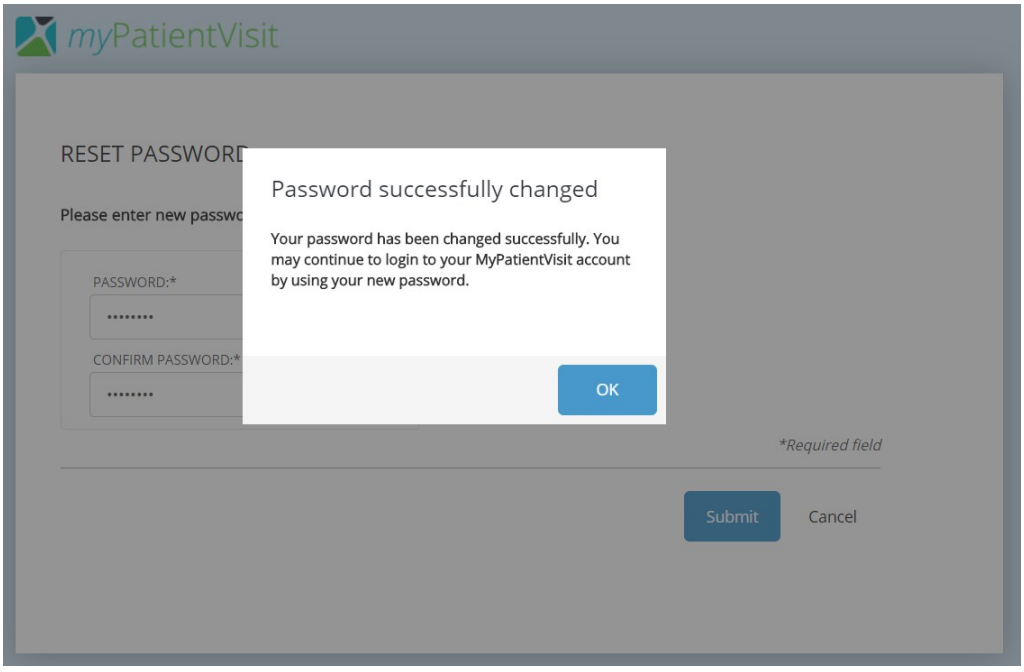
The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).



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



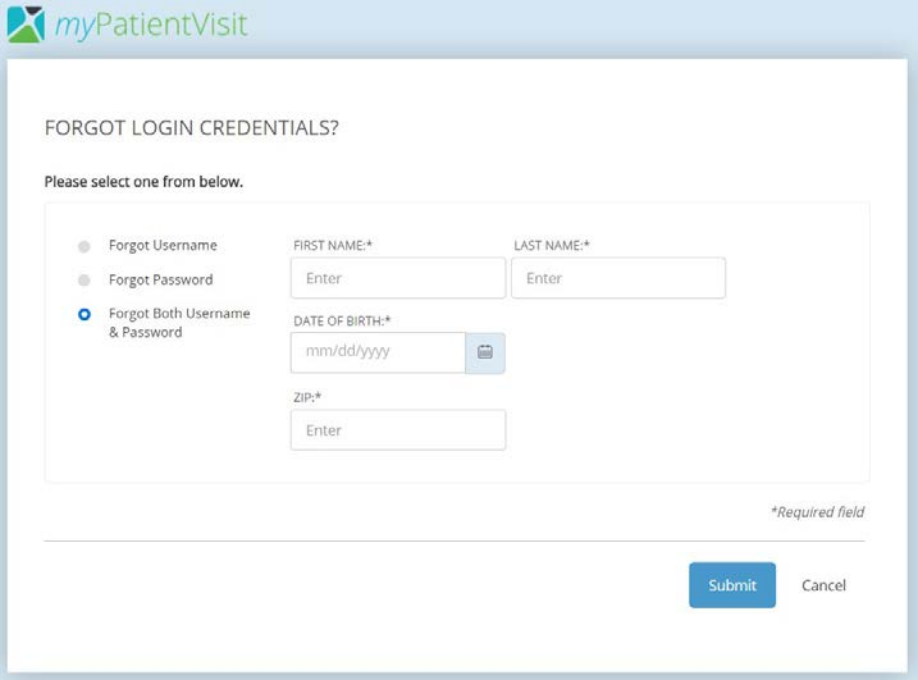
The patient will get confirmation that their password was successfully changed.



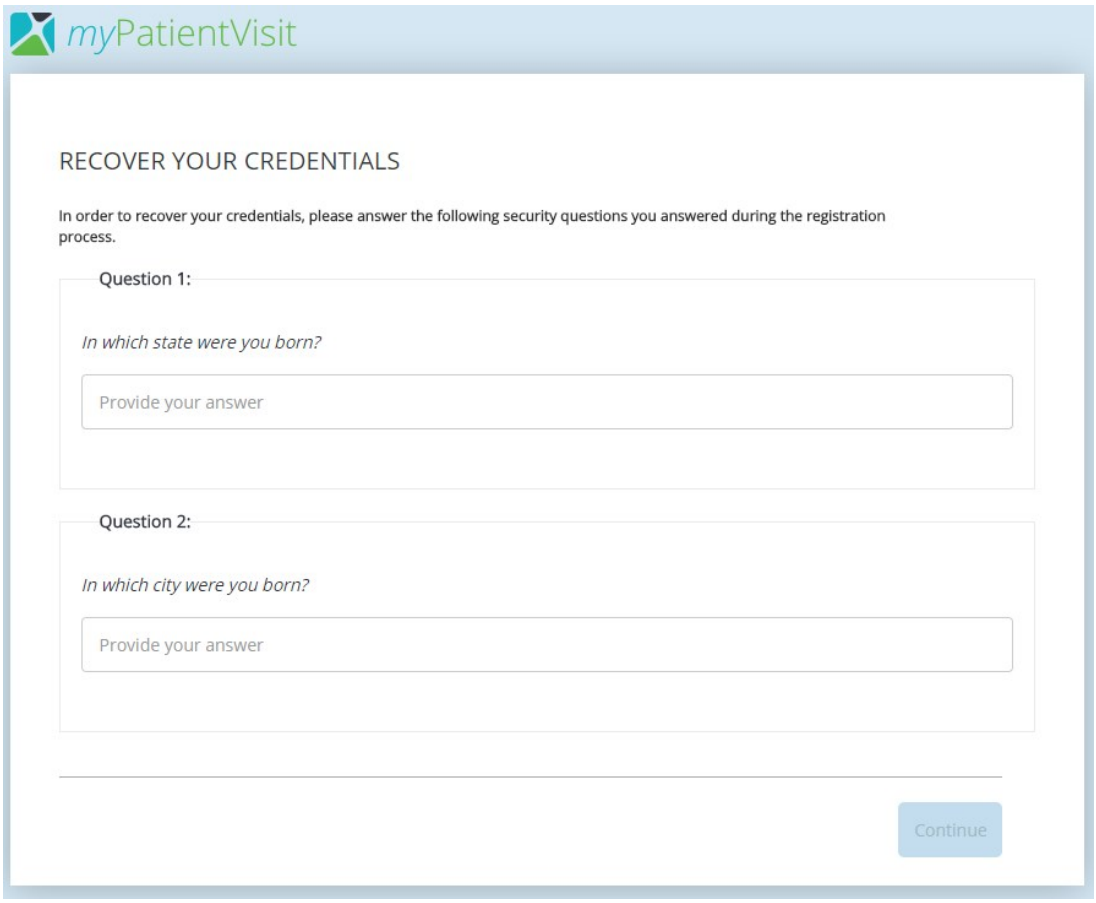
The patient will then be taken to the login screen where they will enter the correct username and password to access their account.

Forgot Username or Password

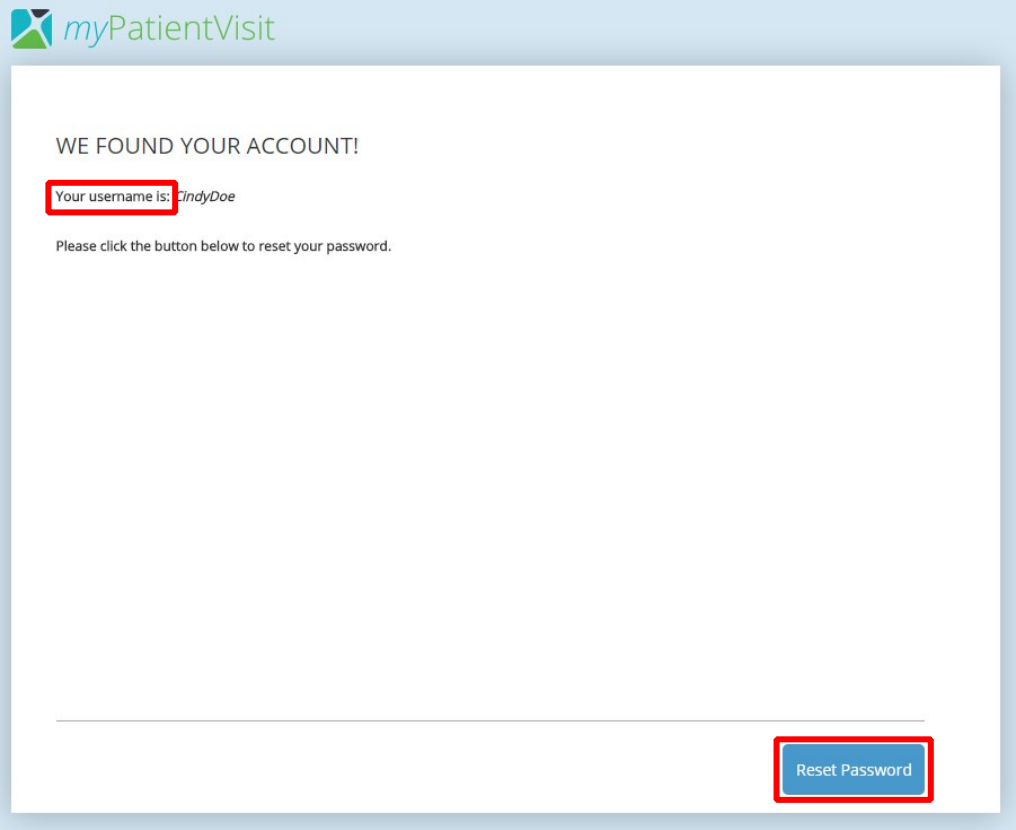
When the patient selects “Forgot Both Username & Password”, they will be asked to enter their First Name, Last Name, Date of Birth and Zip they used to create their login.



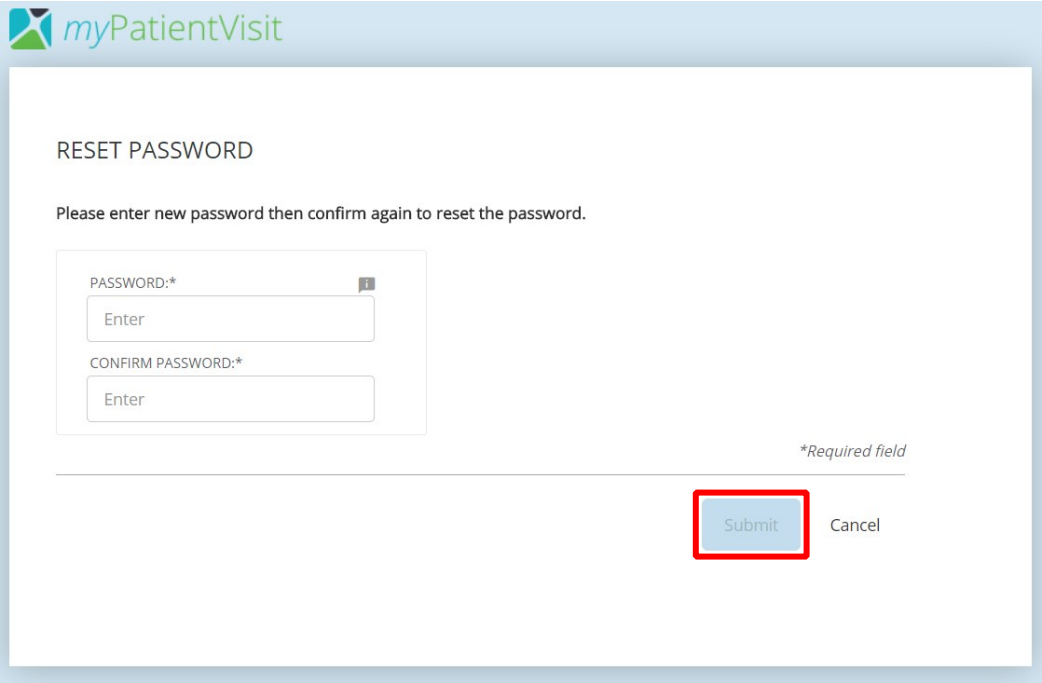
The patient will be asked to answer the security questions they set up when creating their login (these will be different for each patient).



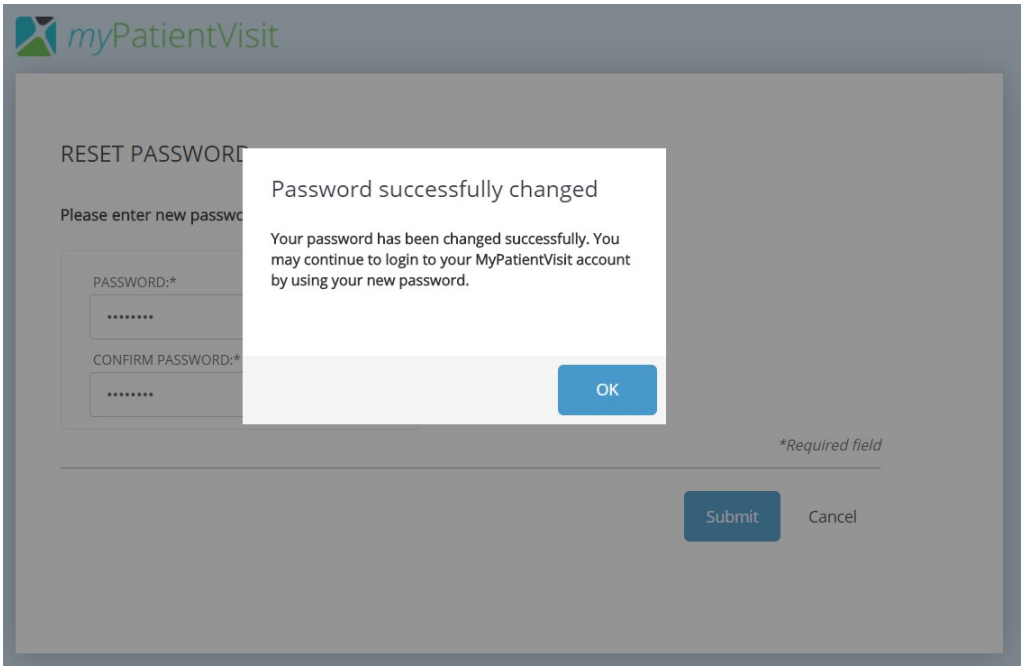
If the correct information is entered, MyPatientVisit will display the patient's username. The patient will then click on "Reset Password".



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



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.