

APC Patient Portal Tutorials

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Introduction to the Patient Portal

The Patient Portal is a web site that enables your patients to view certain areas of their medical chart online, including their:

- Medical summary
- Current medications and vaccinations
- Lab results
- Medical reports (documents)

| Appointments Next: No appointment found Last: Tue. January 27, 2015 at 10:00AM (N/A) To book an appointment, select the "Book an Appointment" tab above, or call the clinic between 9am and 5pm, Monday through Friday. | Recent Activity <table><tr><td>27-Jan-2015</td><td>Appointment</td></tr><tr><td>23-Jan-2015</td><td>Lab Results Available</td></tr><tr><td>23-Jan-2015</td><td>Lab Results Available</td></tr><tr><td>23-Jan-2015</td><td>Lab Results Available</td></tr></table> | 27-Jan-2015 | Appointment | 23-Jan-2015 | Lab Results Available | 23-Jan-2015 | Lab Results Available | 23-Jan-2015 | Lab Results Available |
|---|--|-------------------|-------------|---------------|-----------------------|------------------------|-----------------------|-------------|-----------------------|
| 27-Jan-2015 | Appointment | | | | | | | | |
| 23-Jan-2015 | Lab Results Available | | | | | | | | |
| 23-Jan-2015 | Lab Results Available | | | | | | | | |
| 23-Jan-2015 | Lab Results Available | | | | | | | | |
| Current Conditions <table><tr><th>Date of Diagnosis</th><th>Diagnosis</th><th>Date of Onset</th><th>Notes</th></tr><tr><td>23-Jan-2015</td><td>Hypertension</td><td></td><td></td></tr></table> | | Date of Diagnosis | Diagnosis | Date of Onset | Notes | 23-Jan-2015 | Hypertension | | |
| Date of Diagnosis | Diagnosis | Date of Onset | Notes | | | | | | |
| 23-Jan-2015 | Hypertension | | | | | | | | |
| Current Medications <table><tr><th>Start Date</th><th>Name</th><th>Dosage</th></tr><tr><td>01-Jan-2015</td><td>indapamide-perindopril</td><td>1x OD</td></tr></table> | | Start Date | Name | Dosage | 01-Jan-2015 | indapamide-perindopril | 1x OD | | |
| Start Date | Name | Dosage | | | | | | | |
| 01-Jan-2015 | indapamide-perindopril | 1x OD | | | | | | | |
| Vaccinations No Records to Display | | | | | | | | | |
| Allergies and Adverse Reactions <table><tr><th>Date Noted</th><th>Description</th><th>Symptoms</th><th>Certainty</th></tr><tr><td>23-Jan-2015</td><td>sulfa drugs</td><td></td><td>Confirmed</td></tr></table> | | Date Noted | Description | Symptoms | Certainty | 23-Jan-2015 | sulfa drugs | | Confirmed |
| Date Noted | Description | Symptoms | Certainty | | | | | | |
| 23-Jan-2015 | sulfa drugs | | Confirmed | | | | | | |

You can also use the Patient Portal to:

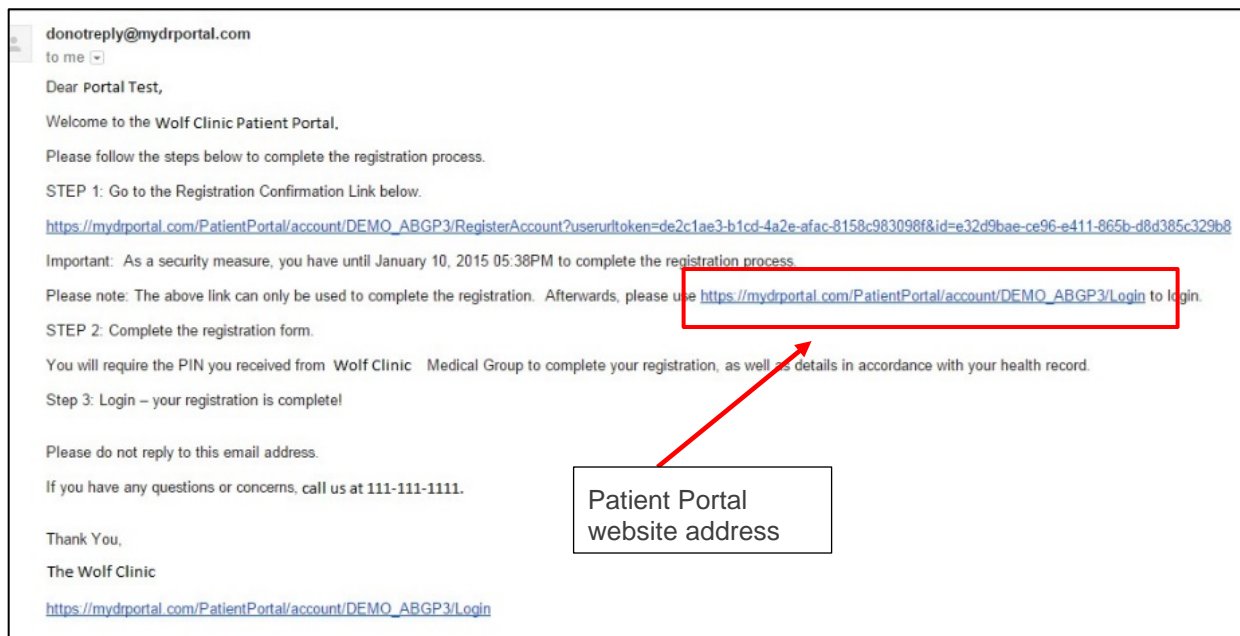
- View and book appointments online
- Receive messages from your clinic
- Send messages to your clinic
- Receive automated notifications (for example, to book appointments or to come in for overdue tests)
- Print medical summary reports, medication reports, and vaccination reports.

Using the Patient Portal

Accessing the Patient Portal

To gain access to the Patient Portal, you must receive an invite from your clinic. The clinic gives you a paper registration letter, and sends you a registration email. Do not throw the letter away as you need the PIN to sign into the Patient Portal for the first time.

Following is an example of the email you receive.



The registration email provides you with a link to the clinic's Patient Portal website.

Tip: Add the Patient Portal link to your web browser favourites so you can easily access the website going forward.

To log into the Patient Portal:

1. Open a web browser, and then go to the clinic's Patient Portal website address. The Patient Portal Login page displays.



Patient Portal Login

Please enter your Username and password.

Username

Password

Log In

[Forgot Username](#)

| [Forgot Password](#)

Enter your User Name and Password, and then click Log In.

If you enter an incorrect password 5 times, you receive the following message: "For your security, access to your Patient Portal account has been temporarily suspended due to too many unsuccessful login attempts. Please try again later."

You cannot log in again for one hour.

Tip: Click Forgot User name or Forgot Password for help.

Viewing your Health Information

In the Patient Portal you can view select portions of your health information and the health information of other patients you have access to. The available health information is read-only; you cannot modify or respond to health information in the Patient Portal.

To view your health information:

1. At the top of the Patient Portal, click the Health Information tab. The EMR displays your Health Information page with:
 - A list of available profiles listed at the top of the page (if you have access to other patient's health information).
 - A menu of available health information along the left side of the window.

The screenshot shows the Patient Portal interface. At the top right is a blue button labeled "Book an Appointment". Below it is a navigation bar with tabs: "Home", "Health Information" (selected), "Upcoming Appointments", "Notifications", and "Messages (3)". Under the "Health Information" tab, there is a section "Available Profiles:" with three links: "S Anderson (39)", "B Anderson (40)", and "A Anderson (12)". A red box highlights these links, with an arrow pointing to a label "Available profiles". On the left side, there is a sidebar menu for "View Sarah's" information. The menu items are: "Health Summary" (highlighted), "Health History" (with sub-items "Data View" and "Timeline View"), "Results" (with sub-items "Data View", "Graph View", and "Documents"), "Appointments", "Personal Info", and "Printable Reports" (with sub-items "Summary Report", "Medication Report", and "Vaccination Report"). A red box highlights the entire sidebar menu, with an arrow pointing to a label "Health Information menu". The main content area displays information for "Anderson, S J.", including "Date of Birth: 25-Nov-1976", "Primary Provider: Davidson, J", and "Health #: 9123". Below this is an "Appointments" section showing "Next: No appointment" and "Last: Sat. November". At the bottom is a "Recent Activity" table with four rows of appointments.

| Date | Activity |
|-------------|-------------|
| 28-Nov-2015 | Appointment |
| 18-Feb-2015 | Appointment |
| 13-Feb-2015 | Appointment |
| 06-Feb-2015 | Appointment |

2. If you have access to other patients' health information, in the Available Profiles list, click the patient you want to view health information for.

Your health information displays by default. Available Profiles are set up by the clinic. If you want to view health information for a relation that is not listed, you must receive consent from the patient and request access from the clinic.

3. In the menu on the left side of the window, click the type of health information you want to see. The Portal displays the associated page.

Health Summary page

The Health Summary page displays a summary of your current health information, including:

- Your next and last appointment date and time
- Current Conditions
- Current Medications
- Vaccinations
- Allergies and Adverse reactions

| Appointments Next: No appointment found Last: Sun. October 14, 2012 at 10:34AM (Office Visit) | Recent Activity <table><tr><td>19-Oct-2012</td><td>Appointment Cancelled</td></tr><tr><td>14-Oct-2012</td><td>Appointment</td></tr><tr><td>14-Oct-2012</td><td>Vaccination</td></tr><tr><td>14-Oct-2012</td><td>Lab Results Available</td></tr></table> | 19-Oct-2012 | Appointment Cancelled | 14-Oct-2012 | Appointment | 14-Oct-2012 | Vaccination | 14-Oct-2012 | Lab Results Available |
|--|--|-----------------------|-----------------------|---------------|-------------|--------------------------------|---------------------------|-----------------------|-----------------------|
| 19-Oct-2012 | Appointment Cancelled | | | | | | | | |
| 14-Oct-2012 | Appointment | | | | | | | | |
| 14-Oct-2012 | Vaccination | | | | | | | | |
| 14-Oct-2012 | Lab Results Available | | | | | | | | |
| Current Conditions <table><tr><th>Date of Diagnosis</th><th>Diagnosis</th><th>Date of Onset</th><th>Notes</th></tr><tr><td>14-Oct-2011</td><td>Atypical Migraines (Teal)</td><td></td><td></td></tr></table> | | Date of Diagnosis | Diagnosis | Date of Onset | Notes | 14-Oct-2011 | Atypical Migraines (Teal) | | |
| Date of Diagnosis | Diagnosis | Date of Onset | Notes | | | | | | |
| 14-Oct-2011 | Atypical Migraines (Teal) | | | | | | | | |
| Current Medications <table><tr><th>Start Date</th><th>Name</th><th>Dosage</th></tr><tr><td>14-Oct-2012</td><td>acetaminophen/caffeine/codeine</td><td>2x Four times daily</td></tr></table> | | Start Date | Name | Dosage | 14-Oct-2012 | acetaminophen/caffeine/codeine | 2x Four times daily | | |
| Start Date | Name | Dosage | | | | | | | |
| 14-Oct-2012 | acetaminophen/caffeine/codeine | 2x Four times daily | | | | | | | |
| Vaccinations <table><tr><th>Date Performed</th><th>Age at Vaccination</th><th>Vaccine</th><th>Reaction</th></tr><tr><td>14-Oct-2012</td><td>36</td><td>Hepatitis A & B Adult</td><td>None</td></tr></table> | | Date Performed | Age at Vaccination | Vaccine | Reaction | 14-Oct-2012 | 36 | Hepatitis A & B Adult | None |
| Date Performed | Age at Vaccination | Vaccine | Reaction | | | | | | |
| 14-Oct-2012 | 36 | Hepatitis A & B Adult | None | | | | | | |
| Allergies and Adverse Reactions <table><tr><th>Date Noted</th><th>Description</th><th>Symptoms</th><th>Certainty</th></tr><tr><td>14-Oct-2012</td><td>sulphasalazine</td><td></td><td></td></tr></table> | | Date Noted | Description | Symptoms | Certainty | 14-Oct-2012 | sulphasalazine | | |
| Date Noted | Description | Symptoms | Certainty | | | | | | |
| 14-Oct-2012 | sulphasalazine | | | | | | | | |

Health History

The Health History page displays a summary of your past health information, including:

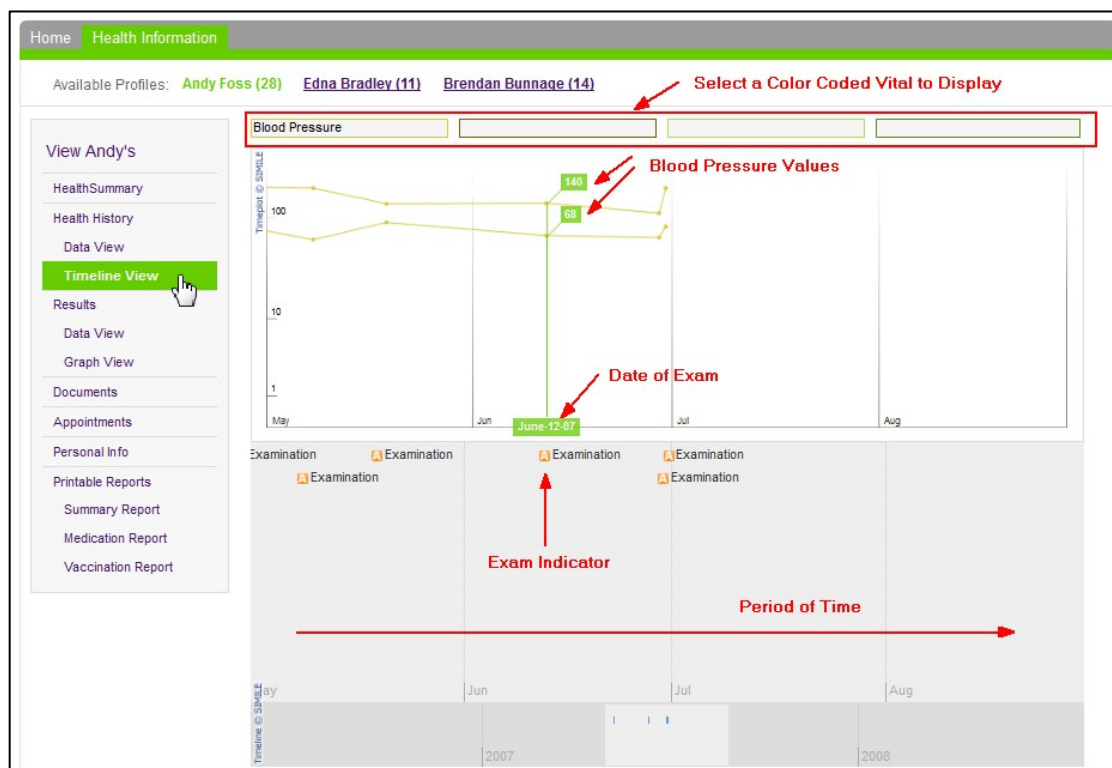
- Inactive Conditions (for the past 5 years – by default)
- Previous Medications (for the past 5 years – by default)
- Procedures
- Inactive Allergies and Adverse Reactions

You can view your health history using two different view options:

1. Data View: Displays health history information in a list format.

| |
|--|
| Inactive Conditions No Records to Display |
| Previous Medications No Records to Display |
| Procedures No Records to Display |
| Inactive Allergies and Adverse Reactions No Records to Display |

2. Timeline View: Displays both your historic and current health information in a graphical format. The Timeline includes:
 - Appointment dates and details
 - Examination dates with some details (including height, weight, BMI)
 - Vitals (including blood pressure, temperature, and pulse)
 - Investigations (including hemoglobin, mononucleosis [MONO] Test, carboxy-tetrahydrocannabinol confirmation [THC], white blood cell count [WBC])
 - Diagnosis dates for conditions



To navigate the Timeline View:

- To scroll backwards or forwards on the graph, in the grey area below the graph, click and drag your cursor. The timeline moves with your cursor.
- To view details for a specific appointment or examination listed in the grey area of the Timeline, click the appointment or examination text. The Timeline displays the details for the appointment or examination.

Examination

Examination:

BIOMETRICS: Height: 63 in, Weight: 105 lbs, BMI: 18.7
VITALS: BPSystolic: 155, BPDiastolic: 70

Physician: Adams, Fred, M.D.C.M.
Wed, 13 Aug 2014 09:10:00 GMT
Wed, 13 Aug 2014 09:20:00 GMT

Examination

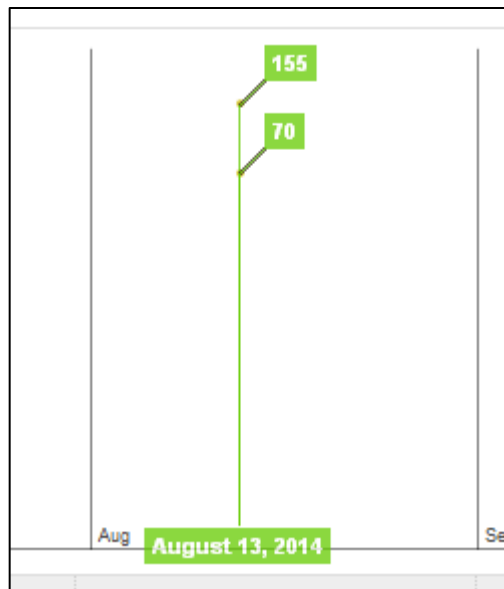
Appointment (Allergies)

Appointment (Allergies)

Appointment Length: 10
Physician: Adams, Fred, M.D.C.M.
Tue, 12 Aug 2014 11:45:00 GMT

Appointment (Allergies)

- To view details for a specific data point on the graph, hover your cursor over the point. The Timeline displays the date and data value.



- d) To include a particular vital or investigation on the graph, click one of the color-coded fields at the top of the graph and then, in the list of available vitals and investigations, click the value you want to graph.

er at your next visit.

| | |
|----------|--|
| Pressure | Blood Pressure Pulse Temp Hemoglobin MONO TEST TSH WBC |
|----------|--|

Results

The results page displays your lab and other investigation results for the past 5 years (by default). You can view your results using two different view options.

1. Data View: Displays your results in the form of a table, and includes the following information for each result:
 - o Date
 - o Test Type and Test
 - o Abnormal
 - o Result
 - o Range (if an optimal range is available)

Lab Results

Drag a column header and drop it here to group by that column

| Date | Test Type | Test | Abnormal | Result | Range |
|-------------|-----------|---------------------------|----------|------------|-------|
| 01-Oct-2012 | WBC | WBC | | 4.9 10E9/L | |
| 01-Oct-2012 | Hgb | Hgb | | 139 g/L | |
| 01-Oct-2012 | Baso | Differential: Baso | | 0.0 | |
| 01-Oct-2012 | EOS | Differential: Eosinophils | | 0.1 | |
| 01-Oct-2012 | Lymph | Differential: Lymph | | 1.7 | |
| 01-Oct-2012 | Mono | Differential: Mono | | 0.4 | |
| 01-Oct-2012 | Neutro | Differential: Neutro | | 2.7 | |
| 01-Aug-2014 | WBC | WBC | | 6.0 10E9/L | |
| 01-Aug-2014 | Hgb | Hgb | | 130 g/L | |
| 01-Aug-2014 | TSH | TSH | | 1.7 mU/L | |
| 01-Aug-2014 | Baso | Differential: Baso | | 0.0 | |
| 01-Aug-2014 | EOS | Differential: Eosinophils | | 0.0 | |
| 01-Aug-2014 | Lymph | Differential: Lymph | | 2.0 | |
| 01-Aug-2014 | Mono | Differential: Mono | | 0.5 | |
| 01-Aug-2014 | Neutro | Differential: Neutro | | 3.5 | |

- To change the sort order of the table, click a column heading. The page sorts the result by the contents of the selected column.
- To categorize the results, click a column header and drag it to the area above the table. The page categorizes the results by the contents of the selected column. For example, if you categorize results by Test, the table displays all results for each test together:

Lab Results

Test

| Date | Test Type | Test | Abnormal | Result | Range |
|---------------------------------|-----------|---------------------------|----------|------------|-------|
| Test: Differential: Baso | | | | | |
| 01-Oct-2012 | Baso | Differential: Baso | | 0.0 | |
| 01-Aug-2014 | Baso | Differential: Baso | | 0.0 | |
| Test: Differential: Eosinophils | | | | | |
| 01-Oct-2012 | EOS | Differential: Eosinophils | | 0.1 | |
| 01-Aug-2014 | EOS | Differential: Eosinophils | | 0.0 | |
| Test: Differential: Lymph | | | | | |
| 01-Oct-2012 | Lymph | Differential: Lymph | | 1.7 | |
| 01-Aug-2014 | Lymph | Differential: Lymph | | 2.0 | |
| Test: Differential: Mono | | | | | |
| 01-Oct-2012 | Mono | Differential: Mono | | 0.4 | |
| 01-Aug-2014 | Mono | Differential: Mono | | 0.5 | |
| Test: Differential: Neutro | | | | | |
| 01-Oct-2012 | Neutro | Differential: Neutro | | 2.7 | |
| 01-Aug-2014 | Neutro | Differential: Neutro | | 3.5 | |
| Test: Hgb | | | | | |
| 01-Oct-2012 | Hgb | Hgb | | 139 g/L | |
| 01-Aug-2014 | Hgb | Hgb | | 130 g/L | |
| Test: TSH | | | | | |
| 01-Aug-2014 | TSH | TSH | | 1.7 mU/L | |
| Test: WBC | | | | | |
| 01-Oct-2012 | WBC | WBC | | 4.9 10E9/L | |
| 01-Aug-2014 | WBC | WBC | | 6.0 10E9/L | |

- c) To change the order of the table columns, click a column header and drag it to where you want the column to display.
2. Graph View: Displays your results in the form of a graph. From the top, select the measure that you want to graph.

Click or hover your mouse over a data point to see the date and time of the result. The normal range appears next to the measure name at the top and within the graph.

View Jodi's

Health Summary

Health History

Data View

Timeline View

Results

Data View

Graph View

Documents

Appointments

Personal Info

Printable Reports

Summary Report

Medication Report

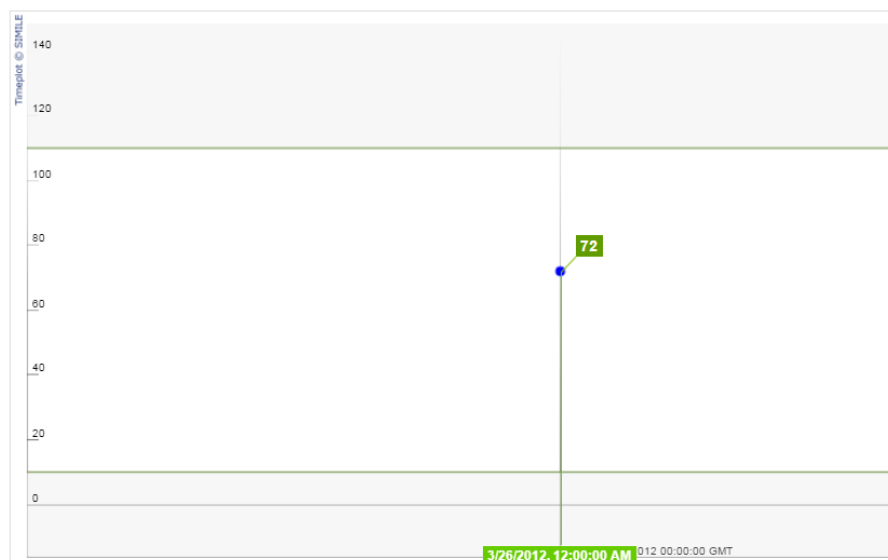
Vaccination Report

Results displayed below should not be considered a diagnosis or prognosis. Your care provider assesses this information in the context of your medical history when considering your care plan.

Please select the measure you would like to graph:

FERRITIN

Range: 10-110 ug/L



Documents

The Documents area displays a list of your health documents, such as medical reports, requisition forms, and consult letters.

| Documents | | | | |
|-----------------------------|----------------------------------|-------------------------------------|---|---------------------------------|
| Date | Document Type | Notes | Keywords | Notes For Patient |
| 18-Aug-2014 | Note | Absence certificate | Work Absence | notes |
| 18-Aug-2014 | Requisition | | 2nd Trimester Prenatal Req-AB | still more note |
| 16-Sep-2014 | Incoming Consult | | Mole Check | final notes |

To view a document, click the document. The document opens in a separate window or tab in your internet browser.



Troubleshooting: What if the document does not open?






Your web browser is likely out of date. Try opening the Patient Portal in another web browser, or update the browser you are currently using.

Appointments

The Appointments page displays a summary of your upcoming and past appointments in a table format. The table displays basic appointment information, including:

- Appointment date and time
- Provider
- Appointment reason
- Clinic location

| Upcoming Appointments | | | | |
|-----------------------|-------------|-------------|--|--|
| Date | Provider | Reason | Location | |
| 21-Apr-2016 10:20 AM | Adams, Fred | Counselling |  Pacific Family Medical Group |  Cancel |

| Past Appointments | | | |
|----------------------|-------------------|-----------|---|
| Date | Provider | Reason | Location |
| 28-Nov-2015 10:00 AM | Adams, Fred | Allergies |  Pacific Family Medical Group |
| 18-Feb-2015 9:30 AM | Baker, Bill, M.D. | URTI |  Pacific Family Prenatal Clinic |
| 13-Feb-2015 9:45 AM | Baker, Bill, M.D. | Other |  Pacific Family Prenatal Clinic |
| 06-Feb-2015 9:00 AM | Charles, John | Other |  Pacific Family Medical Group |
| 29-Jan-2015 9:15 AM | Baker, Bill, M.D. | URTI |  Pacific Family Prenatal Clinic |

Personal Info

The Personal Info page displays your contact information and other personal information, including:

- Social History
- Family History
- Harmful Substances/Risks

Address: 1285 Cherry Lane, Cold Lake, AB

Phone Number: (403) 555-1020

Email: wolfemrportaltest@gmail.com

Social History

Marital Status:

Significant Other:
Occupation:

Family History

No Records to Display

Harmful Substances/Risks

Smoking: Smoker
Alcohol: Light: < 6 Drinks/Week

Pack Years Smoked: 14
T-ACE Score: 0

If your contact information is out-of-date, contact the clinic to inform them of the change. You cannot edit your personal information in the Patient Portal.

Printing your health information

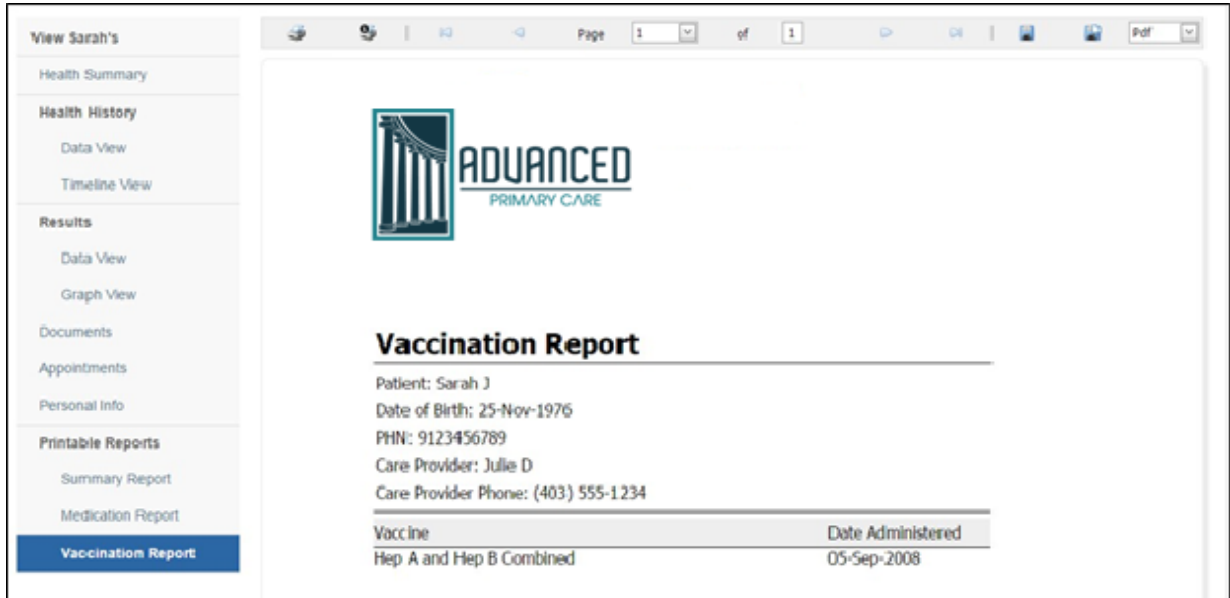
You can print your Patient Portal health information in a printer-friendly format using Printable Reports.

Available reports include the:





- Summary Report: Prints your current health information, including vaccinations, allergies, current conditions, and current medications.
- Medication Report: Prints your current medications, past medications, and allergies.
- Vaccination Report: Prints your recorded vaccinations.

To print your health information:

1. Navigate to the Health Information tab of the Patient Portal.
2. In the left pane, in the Printable Reports area, click the report you want. The page displays the selected report in a PDF view.



3. Perform one of the following actions:

- To print the full report, click Print .
- To print only the page displayed, click Print the current page .
- To save the report to your computer, click Export report and save it to the disk .
- To view the report in its own browser window and view or print it from there, click Export a report and show it in a new window .

Notifications

In the Notifications area you can view any notifications sent from the clinic. The types of notifications you can receive include:

- Reminders that you are due for preventive care or disease management tests
- Reminders that you are due for follow up appointments
- Tips for managing your health

To view your notifications, at the top of any Patient Portal page, click the Notifications tab. The Patient Portal displays your list of notifications.

| Notifications | | |
|-------------------|----------------------|---|
| Date | Patient | Message |
| December 20, 2014 | Brian Anderson (39) | You are now 6 months overdue for your A1C bloodwork. Please book an online appointment with your doctor. |
| March 23, 2010 | Brian Anderson (39) | Our records indicate that you are overdue for a hemoglobin A1C blood test. Please go to the Book an Appointment tab and book a Diabetes Follow Up with your primary care provider at your earliest convenience. |
| September 5, 2014 | Brian Anderson (39) | Our records indicate that you are a candidate for a diabetes support program. Dr Adams has reviewed the program and believes it has many elements that can help you better manage your diabetes. Please click BestDays to visit the site. On your next visit, Dr Adams will be pleased to hear what you think of the program. |
| April 24, 2014 | Audrey Anderson (11) | <p>About Inhalers</p> <p>Several different kinds of asthma medicines are taken using an inhaler. Inhaled asthma medications go directly to the site of inflammation and constriction in the airways instead of traveling through the bloodstream to get there. Inhaled medications are the preferred therapy for asthma. Inhaled medications only work if they get to the airways, so learn how to use your inhaler properly.</p> <p>Many people do not use their inhalers properly, so the medication does not reach their airways. It is very important that you show your doctor, pharmacist, or asthma educator how you use your inhaler to make sure the medication is getting into your lungs, where you need it.</p> <p>Click here to learn how to use an inhaler properly!</p> |

Booking appointments

Through the Patient Portal you can book appointments with a practitioner.

To book an appointment:

1. Log into the Patient Portal, and then, at the top of the window, click Book an Appointment.



The Portal displays the first book appointment page: Choose Patient & Reason.

Choose Patient & Reason

Please select the patient and the reason for the appointment. Note that patients with more than 2 future web booked appointments are not eligible to book online, and should call the clinic to book an appointment. The NEXT button will bring you to the page that allows you to choose the location and provider.

For whom are you making the appointment?*

Anderson, Angela (Angie) (64) ▼

What is the main reason for your appointment?*

☐ Allergies

☐ Asthma

☐ Bone Density Testing

☐ Cold/flu symptoms

☐ Counselling

☐ Diabetes Follow Up

☐ General Office Visit

☐ Pelvic Exam/PAP (female)

☐ Prenatal Check-up

☐ Prescription Renewal

☐ Skin Concern

☐ Urinary Concerns

☐ Vaccination

☐ z - Other

Back

Next

2. If you have access to other patients' health information, in the for whom are you making the appointment? Drop-down list, select the patient you want to book the appointment for.
3. Select the reason for the appointment, and then Click Next.

The options available in the reason for appointment area are determined by the clinic. See "Enabling specific types of appointments to be booked online" on page 90.

The Portal displays the second booking page: Choose Location & Provider.

Choose Location & Provider

Please select the provider and location for the appointment. The NEXT button will bring you to the page that allows you to choose the date and time for the appointment.

Based on your information, the following location are available. Choose the location you would like to go.*

| | |
|---|--|
| <input checked="" type="radio"/> Pacific Family Medical Group (403) 555-1234 1234 - Wolf Ave. Calgary, AB, T2R 0S9 | <input type="radio"/> Pacific Family Prenatal Clinic 4135551212 123 Apple Street Calgary, AB, Y6T 4R4 |
|---|--|

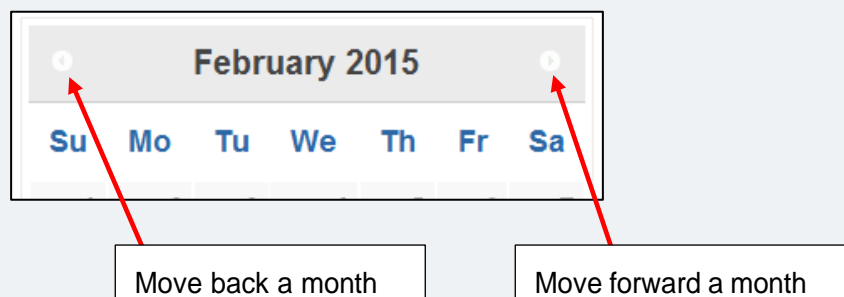
Based on the location you selected, who would you like to see for your appointment?*

Adams, Fred ▼

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4. If multiple clinic locations display, click the location you want to book the appointment at.
5. In the Based on the location you selected, who would you like to see for your appointment? Drop-down list, select the provider you want to book the appointment with.
6. Click Next. The Portal displays the third booking page: Date & Time.
7. On the calendar, click the date you want to book the appointment for. The Patient Portal displays available booking times for the selected date.

Tip: To change the calendar month, click the arrow icons to the right and left of the month name.



Choose Date & Time

Please select your desired appointment date. Choose the month and date of your left; available time slots for selected date will appear to the right. Select your desired time by clicking 'Select Time' link

Select a Date

| February 2015 | | | | | | |
|---------------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

Available Time Slots (Thursday, February 12, 2015)

[Refresh Times](#)

Click on 'Select Time' to proceed to next step.

All times are shown in Mountain Standard Time

| Time | Practitioner | |
|---------|--------------|-----------------------------|
| 1:00 PM | Adams, Fred | Select Time |
| 1:10 PM | Adams, Fred | Select Time |
| 1:20 PM | Adams, Fred | Select Time |
| 1:30 PM | Adams, Fred | Select Time |
| 1:40 PM | Adams, Fred | Select Time |
| 1:50 PM | Adams, Fred | Select Time |

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Notes: Dates with at least one available booking time are highlighted on the calendar.

- To the right of the time slot you want, click Select Time. The Portal displays the Confirm Details page.
- Review the details of the appointment.

Make sure you review the clinic's Cancellation Policy. Pay special attention to important details such as cancellation or no-show charges.

- In the Are there any other details you wish to specify for this appointment? Field, enter any additional appointment notes.
- By default, the EMR sends you a confirmation email with your appointment details. If you do not want to receive an email, clear the Send Email of this Appointment to my Email Account check box.

Almost done! Please confirm by clicking the BOOK IT button below.

Appointment For
Lemon, Jodi (45)

Date and Time
Thursday, March 17, 2016 at 11:30 AM

Appointment Reason
Rash

Selected Practitioner
Schreiber, Janna S., MD PhD FRCPC

Clinic Location
Wolf Clinic
2805 SE Knight Court
Morley, AB, A7Y 3M9

Special Instructions/Information

Are there any other details you wish to specify for this appointment?

Maximum 200 characters, [200] remaining.

Cancellation Policy

We understand that due to sickness, work commitments and other circumstances out of your control that you may need to cancel or reschedule your appointment. However, appointments are limited and in high demand and we'd like to offer these available appointments to clients on our waiting list.

Booking an appointment with Wolf Clinic means that you agree to the following cancellation policy:

- You may cancel or reschedule your appointment without charge at anytime 24 hours before your appointment.
- Cancellations or reschedules within 24 hours of your appointment will be charged 50% of the scheduled service price.
- If you do not call to cancel your appointment or do not show up for your scheduled appointment, you will be charged full price for the scheduled service.

☒ Send Email of this Appointment to my Email Account

Back

Book it!

Cancel Booking

12. Click Book It! The Patient Portal:

- Sends you a confirmation email containing your appointment details (unless you opted out of receiving an email).
- Displays the Appointment Booked page.

Appointment Booked

Appointment For

Smith, Pamela A. (34)

Date and Time

Friday, February 13, 2015 at 9:45 AM

Appointment Reason

Allergies



Add to Calendar

Clinic Location

Pacific Family Medical Group
1234 - Wolf Ave.
Calgary, AB, T2R 0S9

Selected Practitioner

Charles, John

Special Instructions/Information**Cancellation Policy**

We understand that due to sickness, work commitments and other circumstances out of your control that you may need to cancel or reschedule your appointment. However, appointments are limited and in high demand and we'd like to offer these available appointments to clients on our waiting list.

Booking an appointment with Pacific Family Medical Clinic means that you agree to the following cancellation policy:

- You may cancel or reschedule your appointment without charge at anytime 24 hours before your appointment.
- Cancellations or reschedules within 24 hours of your appointment will be charged 50% of the scheduled service price.
- If you do not call to cancel your appointment or do not show up for your scheduled appointment, you will be charged full price for the scheduled service.

[Back to Home](#)

[Book Another Appointment](#)

13. To add the appointment to your email calendar, click Add to Calendar.

Add to Calendar is compatible with most of the commonly used calendar applications, including Google calendar, Outlook, yahoo, Hotmail, and iCal (Mac).

14. To book another appointment, click Book Another Appointment.

Canceling appointments

In the Patient Portal, you can view a list of your upcoming appointments. From your upcoming appointment list, you can choose to cancel an appointment.

To cancel an appointment:

1. At the top of the Patient Portal page, click the Upcoming Appointments tab.

If you are canceling an appointment for a patient other than yourself, you must first change to that patient's profile: Click the Health information tab and then, in the Available Profiles list, select the patient.

2. To the right of the appointment, click Cancel. The Patient Portal displays the Cancel Appointment page.

Cancel Appointment

| | |
|---|--|
| Appointment For Smith, Pamela A. (34) | Date and Time Friday, February 13, 2015 at 9:45 AM |
| Appointment Reason Allergies | Selected Practitioner Charles, John |
| Clinic Location Pacific Family Medical Group 1234 - Wolf Ave. Calgary, AB, T2R 0S9 | |
| Special Instructions/Information Please enter a reason for your appointment cancellation. <input type="text"/> | |

Cancellation Policy

We understand that due to sickness, work commitments and other circumstances out of your control that you may need to cancel or reschedule your appointment. However, appointments are limited and in high demand and we'd like to offer these available appointments to clients on our waiting list.

Booking an appointment with Pacific Family Medical Clinic means that you agree to the following cancellation policy:

- You may cancel or reschedule your appointment without charge at anytime 24 hours before your appointment.
- Cancellations or reschedules within 24 hours of your appointment will be charged 50% of the scheduled service price.
- If you do not call to cancel your appointment or do not show up for your scheduled appointment, you will be charged full price for the scheduled service.

[Back to Home](#)[Cancel Appointment](#)

3. Review the details of the appointment you are canceling.
4. In the Special Instructions/Information area, enter your reason for canceling the appointment.
5. Click Cancel Appointment. The Portal displays a dialog box with the following prompt: "This action will cancel your appointment. Do you want to continue?"

Ensure you review the clinic's Cancellation Policy. Pay special attention to important details such as cancellation or no-show charges.

6. Click Continue.

Sending and receiving messages

Clinic providers and staff can send you personalized messages via the Patient Portal. When you receive a message, you are notified by email. The email does not contain the message itself, instead the email prompts you to log in to the Patient Portal to view the message.

Depending on the clinic's processes, you may also be able to send a limited number of non-urgent messages to the clinic via the Patient Portal. If you are restricted to a certain number of messages, the Patient Portal indicates how many you can send over a defined period of time. Once you reach your maximum allowed messages, you are unable to create a new message until the next time period.

For urgent matters, always contact the clinic by phone.

Viewing messages

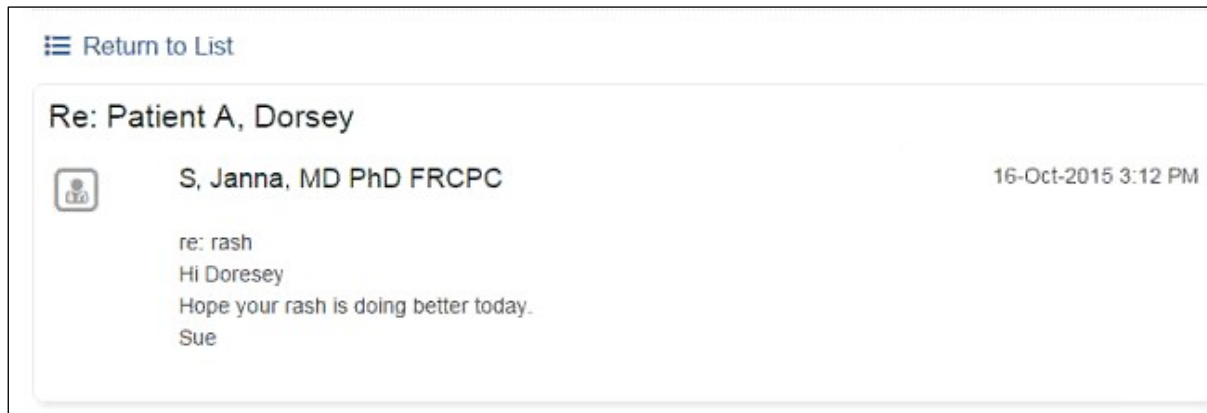
To view a Patient Portal message:

1. Log into the Patient Portal: In the message notification email, click the link provided.
2. On the Patient Portal home page, click the Messages (#) tab (where # = the number of messages you have). The Patient Portal displays a list of your messages.

| From | Date | Regarding Patient |
|--|-----------------------------|---------------------------|
| S. Janna, MD PhD FRCPC | 16-Oct-2015 | A. Dorsey |
| S. Janna, MD PhD FRCPC | 16-Oct-2015 | L. Jodi |
| S. Janna, MD PhD FRCPC | 16-Oct-2015 | L. Jodi |

3. In the list of messages, click the message you want to view. The Patient Portal displays the message contents, including:

- Who sent the message
- The date the message was sent



The clinic's EMR indicates that you have viewed the message. There may also be a Reply button if the sender requested you to reply through the portal.

Sending messages

To send a message:


1. At the top of the Patient Portal page, click the Messages tab. The Patient Portal displays a list of your messages from the clinic.
2. In the left pane, click Compose New Message. The Patient Portal displays the Compose New Message area, with a note at the top indicating how many messages you can send.

Messages to Clinic

Compose New Message

Your maximum messages per year is 50. Messages remaining: 50

This message is regarding whom?* Please choose ▼

 **A, Sarah J.**
To:

Message*

Maximum 1500 characters, [1500] remaining.

If you have an urgent medical concern, please call 911 or go to your nearest urgent care facility immediately

This communication tool is intended only for non-urgent communications between you and your clinic. Please understand that although we will try to review messages in a timely manner, due to work volumes or clinic hours it might be a few days before we can review your message. The message you create becomes part of your electronic chart and may be viewable to others within your circle of care. If you wish to have a confidential conversation with your provider, please book an in person appointment. I have read and understand the information described above.

☐ I have read and understand the information described above

Send **Cancel**

3. In the This message is regarding whom? Drop-down list, select your provider.
4. In the Message area, enter your message.
5. Read the information displayed in the orange dialog area, and then select the I have read and understand the information described above check box.
6. Click Send.

Managing your Patient Portal account

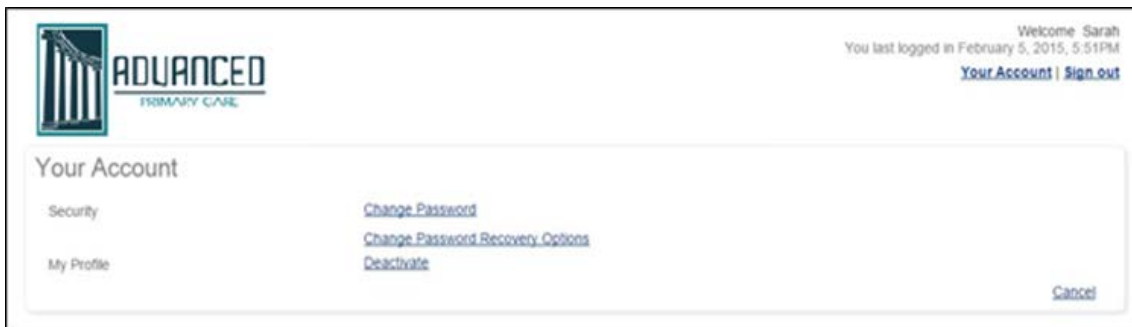
Through the Your Account page of the Patient Portal, you can manage some aspects of your Patient Portal account settings, including your:

- Password
- Password recover security questions
- Account status

Changing your password

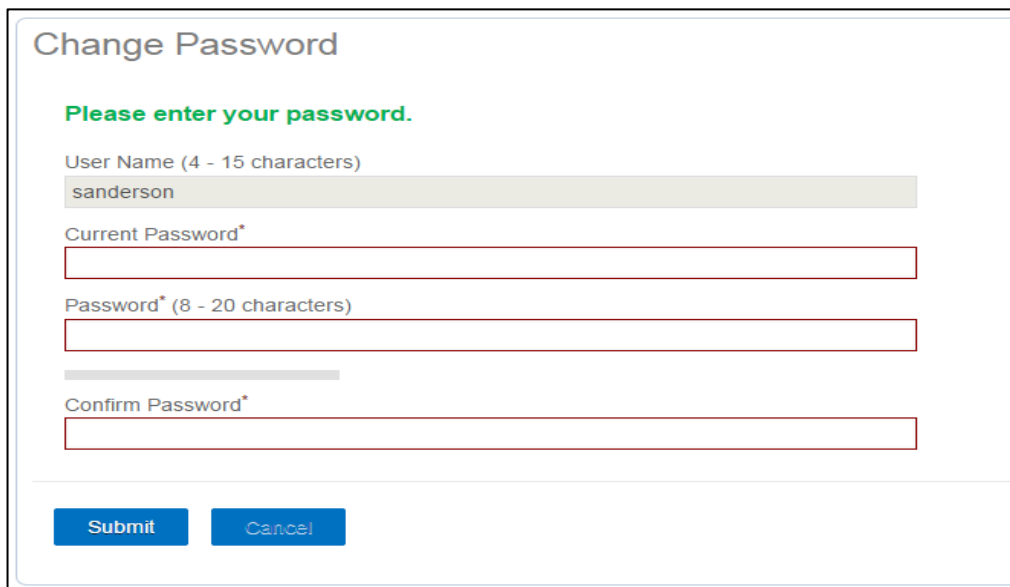
To change your password:

1. On the top right on any page of the Patient Portal, click Your Account. The Portal displays the Your Account Page.



The screenshot shows the 'Your Account' page of the Patient Portal. At the top left is the 'ADVANCED PRIMARY CARE' logo. At the top right, it says 'Welcome Sarah' and 'You last logged in February 5, 2015, 5:51PM', with links for 'Your Account' and 'Sign out'. The main content area is titled 'Your Account' and contains two sections: 'Security' with links for 'Change Password', 'Change Password Recovery Options', and 'Deactivate'; and 'My Profile'. A 'Cancel' button is located at the bottom right of the main content area.

2. In the Security area, click Change Password. The Portal displays the Change Password page.



The screenshot shows the 'Change Password' page. It has a title 'Change Password' and a green instruction: 'Please enter your password.' Below this are three input fields: 'User Name (4 - 15 characters)' with the value 'sanderson', 'Current Password*', and 'Password* (8 - 20 characters)'. There is a horizontal separator line between the 'Password*' and 'Confirm Password*' fields. At the bottom are two buttons: 'Submit' and 'Cancel'.

3. In the Current Password field, enter your current password.
4. In the Password field, enter your new password.

Tip: The Patient Portal does not accept your password if it is not deemed strong enough. Use the following guidelines to strengthen your password:

Use 8 - 20 characters.

Use random capital letters in the middle of the password.

Include numbers and/or special characters.

5. In the Confirm Password field, re-enter your new password.
6. Click Submit.

Changing your password recovery options

If you forget your password, you can answer a series of pre-configured questions to reset your password and regain access to your account. You can modify these password recovery questions at any time.

To change your password recovery options:

1. On the top right of the Patient Portal, click Your Account. The Portal displays the Your Account Page.
2. In the Security area, click Change Password Recovery Options. The Portal displays the Password Recovery Options page.

Password Recovery Options

You can enter new values to modify your security question.

User Name (4 - 15 characters)

Psmith

Security Question (Childhood)*

Who was your childhood hero? ▼

Security Answer (Childhood)*

superman

Security Question (Early Adulthood / Education)*

Where was your high school hangout? ▼

Security Answer (Early Adulthood / Education)*

bars

Security Question (Personal)*

What is your dream car? ▼

Security Answer (Personal)*

mercedes

Submit

Cancel

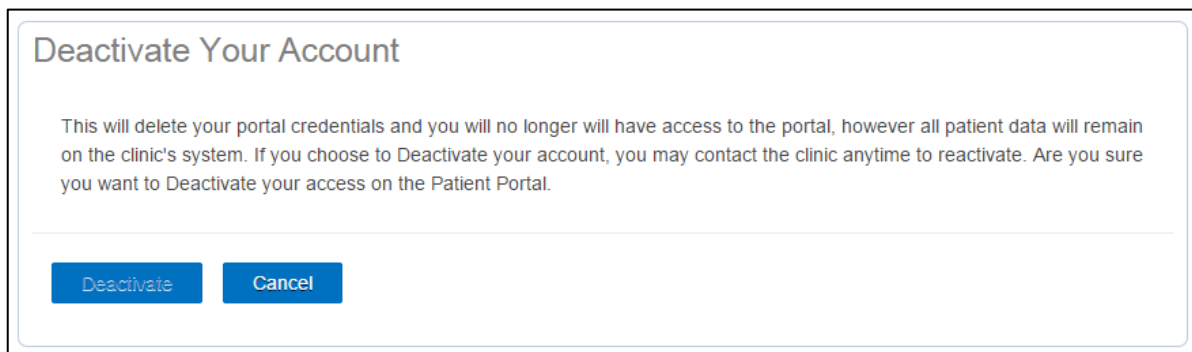
3. To choose a new security question: In one of the Security Question drop-down lists, click a question.
4. In the Security Answer field below the Security Question, enter the answer to the question.
5. When you finish, click Submit.

Deactivating your Account

If you leave the clinic, or if you want to stop online access to your health information for any reason, you can deactivate your Patient Portal account at any time. In deactivating your account, you delete your portal credentials only. All of your patient data remains on the clinic's system.

To deactivate your Patient Portal account:

1. On the top right of the Patient Portal, click Your Account. The Portal displays the Your Account Page.
2. In the My Profile area, click Deactivate. The Portal displays the Deactivate Your Account page, prompting you to confirm that you want to deactivate your account.

A screenshot of a web form titled "Deactivate Your Account". The form has a light blue header bar with the title. Below the title, there is a paragraph of text: "This will delete your portal credentials and you will no longer will have access to the portal, however all patient data will remain on the clinic's system. If you choose to Deactivate your account, you may contact the clinic anytime to reactivate. Are you sure you want to Deactivate your access on the Patient Portal." At the bottom of the form, there are two blue buttons: "Deactivate" and "Cancel".

Deactivate Your Account

This will delete your portal credentials and you will no longer will have access to the portal, however all patient data will remain on the clinic's system. If you choose to Deactivate your account, you may contact the clinic anytime to reactivate. Are you sure you want to Deactivate your access on the Patient Portal.

[Deactivate](#) [Cancel](#)

3. Click Deactivate.

Reactivating your account:

If you later change your mind and want access to your health information again, contact the clinic to reactivate your Patient Portal account.