



**InteliChart “How To”
Patient Portal Navigation**



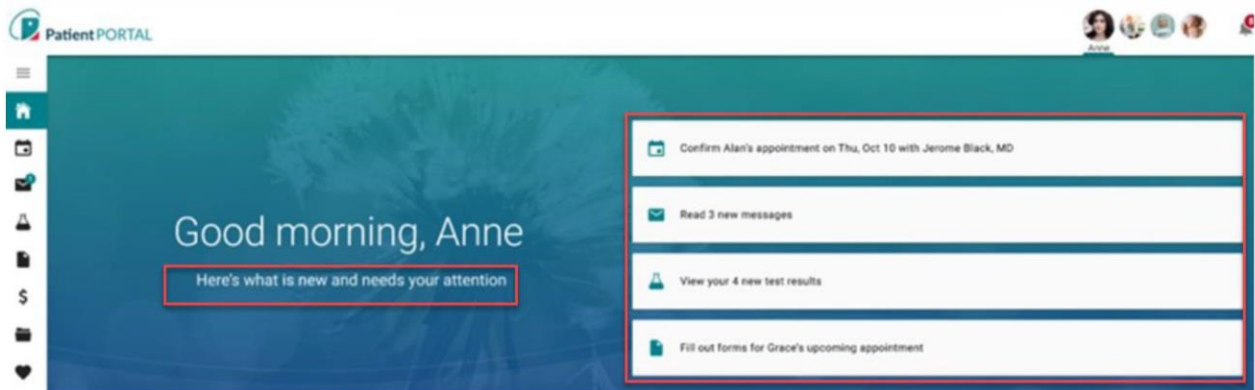


Home Page

The home page focuses on appointments, messages, test results and forms. If a user has children or dependents, the home page rolls up appointments, messages, labs, and forms for review. Users can identify to whom the information applies, as the corresponding avatar is displayed in the bottom left of every card.

Action Tiles

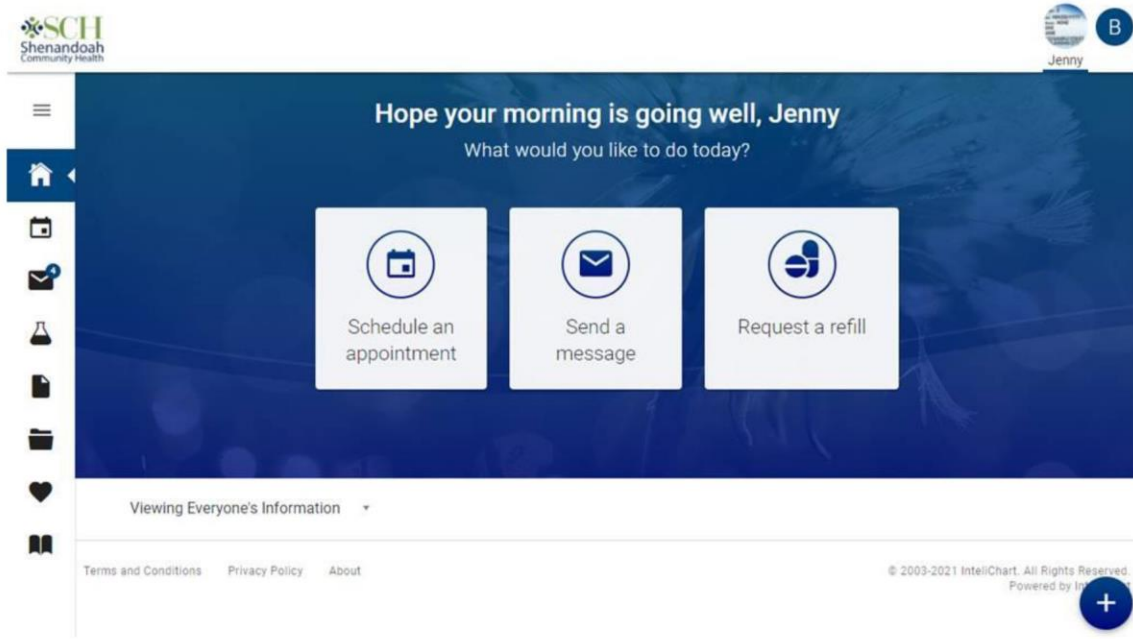
The area to the right of the greeting displays rectangular “action tiles” These are items that require attention, as indicated by the message - "Here's what is new and needs your attention" - displayed under the greeting.





Floating Action Button

The floating action button is an easily accessible shortcut that allows users to do common actions in the Patient Portal. The button is displayed in the bottom right of the screen and stays anchored in position upon scroll.



When the floating action button is clicked, the button displays stacked speed dial actions:

- Request a refill: Opens request a refill workflow
- Send a message: Opens compose new message workflow
- Make an appointment: Opens make an appointment workflow

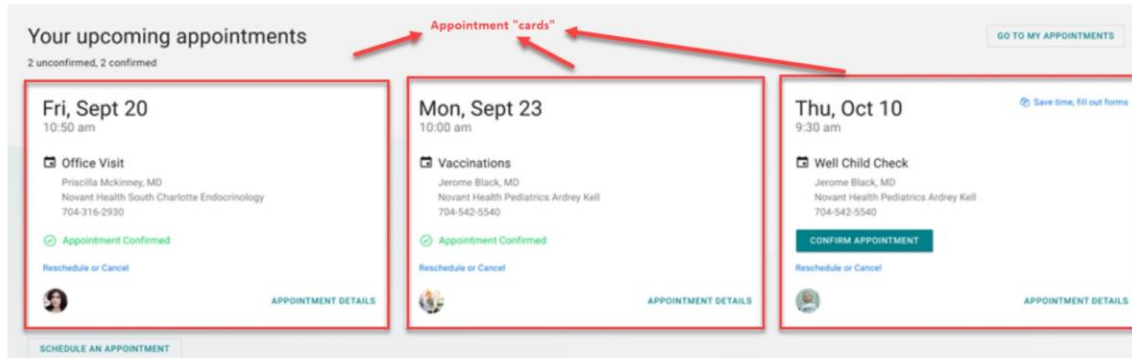




Appointments and Referrals

Upcoming Appointments

If a patient, their child(ren) or a dependent has an upcoming appointment, they will see them in the **Your upcoming appointments** section. If a patient, their child(ren) or dependent have no scheduled appointments, then the section for **Your upcoming appointments** is not displayed on the screen. Each appointment has a “card” and will display the appointment details.

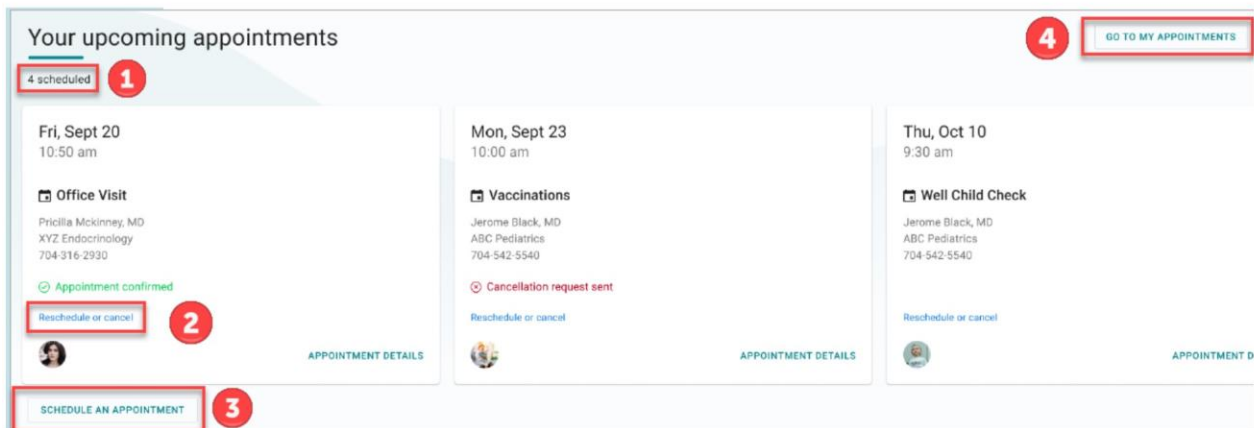


There may be more cards than can be seen on the screen. Here’s how to view them:

- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.


The user can do the following under the **Your upcoming appointments** section:


1. Identify the total scheduled appointments
2. Select the **GO TO MY APPOINTMENTS** to see all appointments
3. Schedule an appointment by selecting **SCHEDULE AN APPOINTMENT**



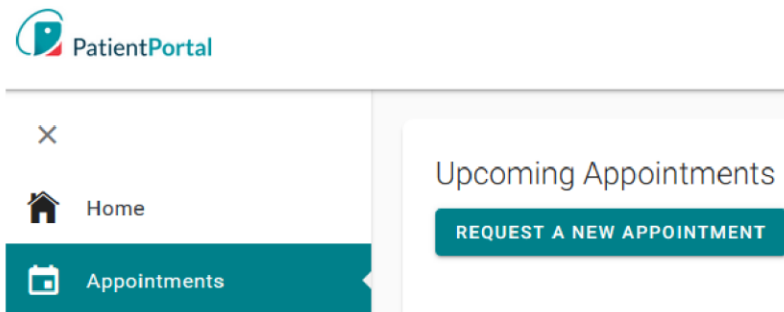


Appointment Request

 Home

 Appointments

The **REQUEST A NEW APPOINTMENT** link on the appointment page will start the appointment request.



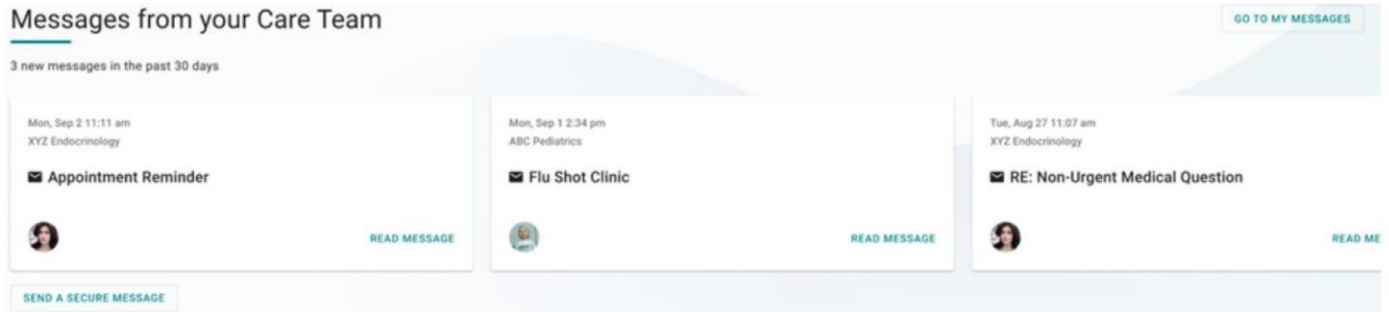
This will prompt a series of questions to complete the appointment request.



Messages

Viewing New Messages

If a patient, their child(ren), or dependent(s) has a message, the "Messages from your Care Team" section appears on the home page. When there are no messages, the "Messages from your Care Team" is not displayed on the screen.



There may be more cards than can be seen on the screen. Here's how to view them:

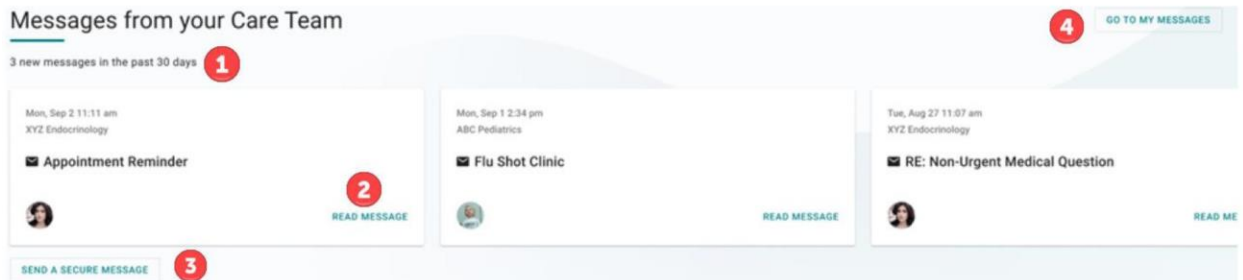
- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.



Note: A message card that has been read disappears from the homepage when the user navigates away from the page.

The user can do the following under the **Messages from your Care Team** section:

1. Identify the total new messages
2. Send a Secure Message
3. Read Message
4. Select the **GO TO MY MESSAGES** to see all Messages





Compose New Message

The Messages Page gives patients the ability to send messages to the practice/facility using the **COMPOSE NEW MESSAGE** button. The Messages Page will allow patients to view secure messages that are incoming messages from the practice/facility in the **INBOX** tab. The patient will view outgoing messages in the **SENT ITEMS** tab. Messages that are deleted show on the **DELETED** tab.

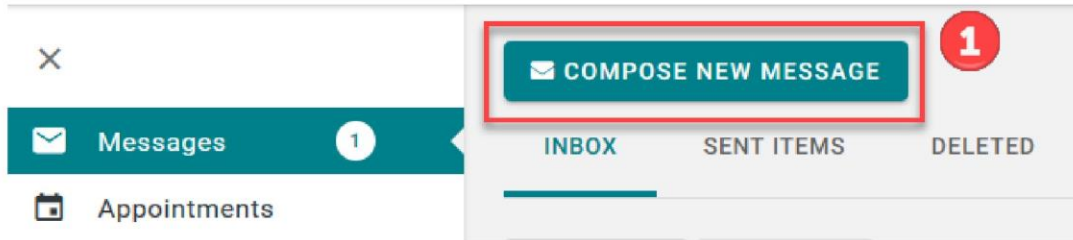
Click here to compose a message to send

<input type="checkbox"/>	From	Subject
<input type="checkbox"/>	Maria	Account balance
<input type="checkbox"/>	Maria	QA Test



COMPOSE NEW MESSAGE gives the patient the ability to send a message to the practice that is in reference to a topic other than an appointment request or medication refill.

1. Click COMPOSE NEW MESSAGE



2. The Practice disclaimer will show at the top of the message
3. Click **On behalf of**: select who the message is on behalf
4. Click the **Practice** drop down arrow and choose the practice from the pick list
5. Click the **Location** drop down arrow and choose the location from the pick list
6. Select who you would like the message to go **To** (based on message groups set by practice)
7. Enter the subject of the message in the **Subject** line
8. If applicable, include an attachment
9. Enter the text in the body of the message
10. Click SEND MESSAGE

Compose new message ×

Please note that you can expect to receive a response within 24 hours. **2**


On behalf of: **3**


Practice: **4**

Location: **5**

To: **6**

Subject: **7**

 **8**

B I U 

My son has a rash on his leg and I would like to know if I should bring him in. **9**

Characters: 921 **10**

CLOSE SEND MESSAGE



Labs

If a patient, their child(ren), or dependent(s) has a lab result, the **Your results are in** section appears on the home page. When there are no messages, the "Your results are in" is not displayed on the screen.



There may be more cards than can be seen on the screen. Here’s how to view them:

- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.



Note: Lab cards are considered viewed and removed from the home page when the user’s session ends, or they log out.

The patient can do the following under the **Your results are in** section:

1. Identify the total new lab results
2. Identify results that are outside the normal range, the value is displayed in orange font
3. Select the **GO TO MY LABS** to see all Lab results



More on reading your lab results:

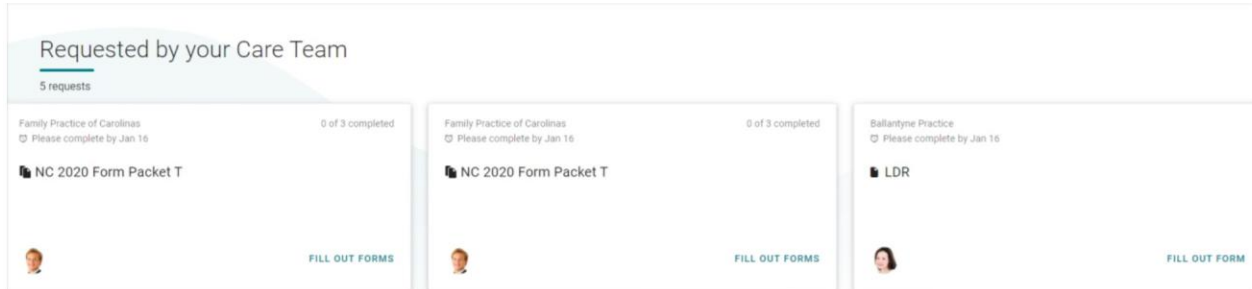
- The bar graph has two colors – green for normal reference range and orange for outside the reference range.
- A small black vertical line represents your current value
- If the lab result is higher than reference range, the black line is on the right.
- If the lab result is lower than reference range, the black line is on the left.
- If the lab result falls inside the normal reference range, the line is at the actual value.



Forms

Forms-Requested by your Care Team

If a patient, their child(ren), or dependent(s) has a pending form to complete, the **Requested by your Care Team** section appears on the home page. When no forms need to be completed, the "Requested by your provider" is not displayed on the screen.

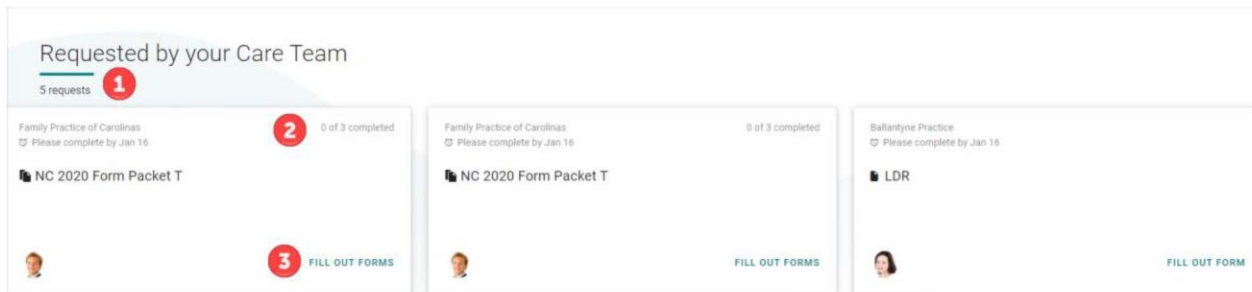


There may be more cards than can be seen on the screen. Here's how to view them:

- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.

The patient can do the following under the **Requested by your Care Team** section:

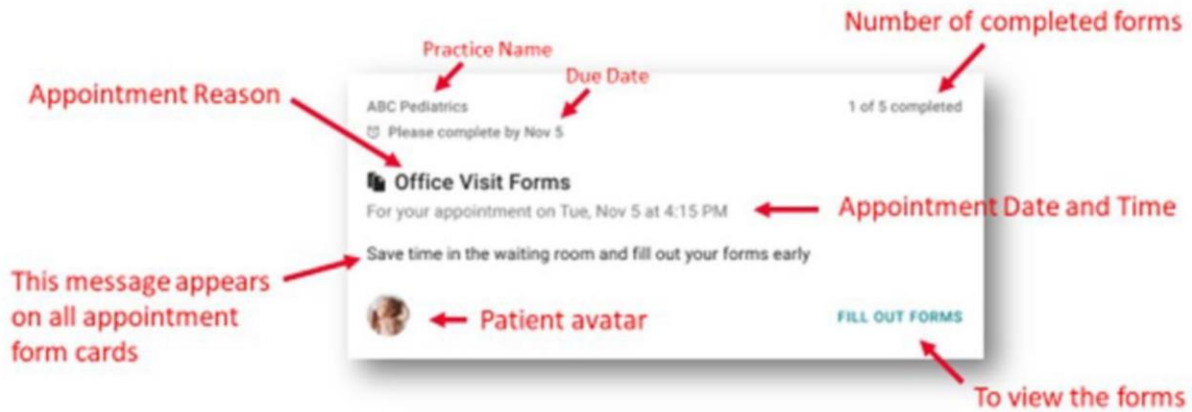
1. Identify the total requests
2. Identify total of forms completed in a packet
3. FILL OUT FORMS





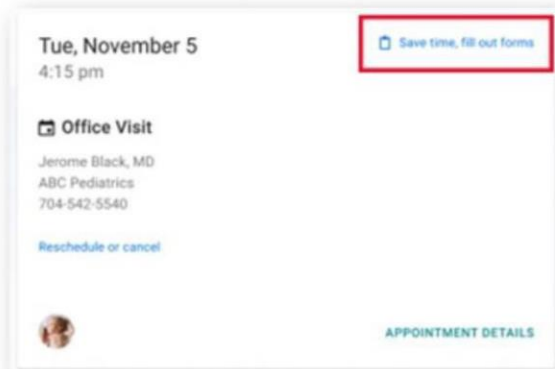
Appointment Form Card

Forms that pertain to an appointment are consolidated into one appointment form card. The card is no longer displayed when the appointment date has passed, or all forms have been completed.

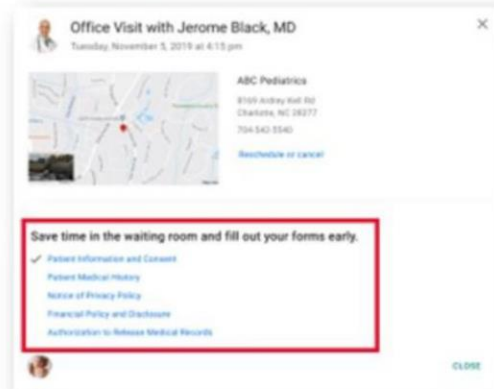


Other ways to access appointment forms:

On appointment card



On appointment details card





Fill Out Forms

When the patient selects **FILL OUT FORMS**, they will be directed to a screen to complete their forms.

The screen will provide the following details.

1. The appointment date and time.
2. A **Please complete by** date with a clock icon. As forms are being completed, the due date and clock icon appear for each. If there is no official due date, the clock will not appear.
3. The number of forms completed in packet, which updates with each form completed.
4. The **Form** column shows the title of each form to be completed.
5. The **Status** column indicates, if the form is Not started, In progress, or Completed.
6. The third column contains buttons to either **FILL OUT THE FORM** or **VIEW FORM**.

Appointment Forms

For your appointment on Mon, Sep 23 at 10:00 AM

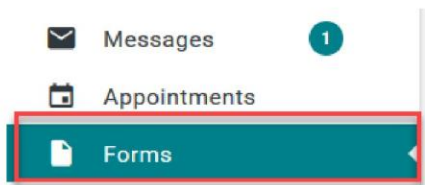
Please complete by Mon, Sep 23

1 of 5 forms have been completed

Form	Status	
✓ Patient Information and Consent	Completed	VIEW FORM
Patient Medical History	In progress	FILL OUT FORM
Notice of Privacy Policy	Not started	FILL OUT FORM
Financial Policy and Disclosure	Not started	FILL OUT FORM
Authorization to Release Medical Records	Not started	FILL OUT FORM

CLOSE

The patient can also access and print forms by selecting Forms in the left-hand navigation. There will be interactive forms that can be completed online and submitted to the practice and static forms that can be printed off and completed at any time.



The patient will have access to view any pending, completed and available forms.



My Chart

My Chart-Chart Summary

The **Chart Summary** page provides an overview of Demographics, Lab Tests, Histories, Allergies, Visits, Medications, Immunizations, Problems, Vitals and Allergies. The most recent 5 records will display on each widget. To see any health record in more detail, click on the widget title or click on respective tab.

Chart Summary

Demographics

Address	888 Test FORT MILL, SC 29707	Work Phone	
Home Phone	(123) 555-0100		
Mobile Phone			
Birthdate	12/25/1968 Age: 51	Gender	M
Preferred Language		Prior Last Name	
Race		Ethnicity	

Emergency Contact

Name	
Phone	
Relationship	

Lab Tests

Social History

Request a Medication Refill

A request for a medication refill can be made only on medications prescribed by the patient's physician.

Click **Refill** under My Chart>Medications tab.

Chart Summary **Medications** Labs Histories Allergies

CURRENT MEDICATIONS PAST MEDICATIONS

It is important to know that the medications listed here are your different medication than what was prescribed, contact your pri

LISINOPRIL 5 mg **i**

Prescribed By: John Bailey

Instructions: take 1 tablet by oral route every day

Refill Details



The patient will be presented with the practice/facility's Medication Refill disclaimer.

Refill a Medication

Click "CONTINUE" ✕

You will receive a response within 24 hours of your refill request.
To continue with the Refill Request click the Continue button below.

CANCEL

CONTINUE

- Select who the request will be sent to (medication refill groups from practice/facility).
- Select a **Pharmacy** from the picklist and then click **SUBMIT**.

Refill a Medication

✕

You are requesting a refill for LISINOPRIL 5 mg

Please select who
you want your
request to be sent
to:

Medication Refill Test

Pharmacy:

CVS: 510 Tom Hall St, Fort Mill, SC 2971

[Add a Pharmacy](#)

CLOSE

SUBMIT

Add a Pharmacy

By adding a pharmacy, the patient can save pharmacies to use for medication refill request.

Click **Add a pharmacy**

Pharmacies

[Add a pharmacy](#)

Show 10 entries

Name	Address	Phone	
CVS	510 Tom Hall St, Fort Mill, SC 29715, USA	(803) 547-5586	Remove Edit

Showing 1 to 1 of 1 entries

Previous 1 Next



The patient will be presented with Add a Pharmacy pop-up. Pharmacies can be added by searching for a pharmacy or manually adding a pharmacy.

Add a Pharmacy:

1. Search for pharmacy using **Search term** (type pharmacy name)
2. Enter Zip in the **Location** field
3. Click **SEARCH PHARMACIES**
4. Click **Save this location** to add the pharmacy

Add a Pharmacy



SEARCH FOR PHARMACIES

MANUALLY ADD A PHARMACY

1 Enter the Pharmacy name

Search term

e.g. Walgreens or CVS

2 Zip Code displays from patient address. Patient can enter a different zip code, if needed.

Location

By default we use your Zip Code on file. You may enter in anything you want here.

3 Click "SEARCH PHARMACIES"

SEARCH PHARMACIES

1 Walmart Pharmacy
500 North Dobys Bridge Road,
Fort Mill, SC 29715, USA

4 **Save this location**

Click "Save this location" to add the pharmacy

- Your pharmacy was saved successfully displays.

1 Walmart Pharmacy
500 North Dobys Bridge Road,
Fort Mill, SC 29715, USA

**Your pharmacy was saved
successfully.**



Manually Add a Pharmacy

1. Click **MANUALLY ADD A PHARMACY**
2. Provide as much data as possible
3. Click **SAVE** to add the pharmacy

Add a Pharmacy ✕

SEARCH FOR PHARMACIES MANUALLY ADD A PHARMACY 1

Name

Phone

Website (optional)

Address

All of the following fields are optional.

Address Line 1

Address Line 2

City

State

Zip

Preferred Pharmacy

Would you like to make this your preferred pharmacy?

CANCEL SAVE 3

The Pharmacy is now listed under the Pharmacies. The patient can also search for a pharmacy in the practice's location and then save it to the pharmacy list. To make changes to the pharmacy information, click **Edit**. To remove pharmacy, click **Remove**.

Pharmacies [Add a pharmacy](#)

Show entries

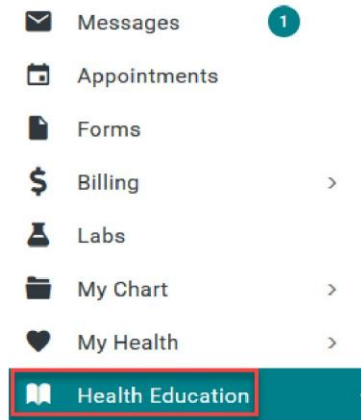
Name	Address	Phone	
Walmart Pharmacy	500 North Dobys Bridge Road, Fort Mill, SC 29715, USA	(803) 228-6130	Remove Edit



Health Education

Health Education will allow the patient to access Health Library utilizing the Medline Plus. Patients can search for a specific health topic. The patients can also choose a topic from the default set of topics that are available. Either option will allow the patient to view health topics.

- Click on the **Health Education** in the left-hand navigation



- Patients can access the practice specific **Health Education** or use the **SEARCH LIBRARY** field to find topics or use the default set of topics that are provided

Health Education

Search:

Show 5 entries

New	Date Received	Provider	Education	Note
NEW	02/23/2018 08:37 AM	Ballantyne Family Office	Rash Pt ed	Please read
NEW	09/19/2018 09:37 AM	Ballantyne Family Office	New medication	Read completely
NEW	11/29/2018 01:25 PM	Ballantyne Family Office	Education	please read asap
NEW	01/29/2019 12:28 PM	Ballantyne Family Office	Toprol Ed	review asap
	12/12/2017 08:16 AM	Ballantyne Family Office	Rash-Patient Ed	Please review the details closely

Showing 1 to 5 of 9 entries

Previous 1 2 Next

Health Library

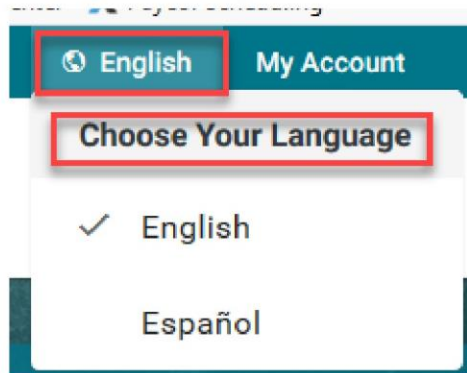
powered by MedlinePlus

[SEARCH LIBRARY](#)



Language Selector

The patient can select English or Spanish for their Patient Portal account by selecting the language drop-down on the top right of the Patient Portal home page.



If the patient selects Spanish, a modal appears with a disclaimer that states the following in Spanish.

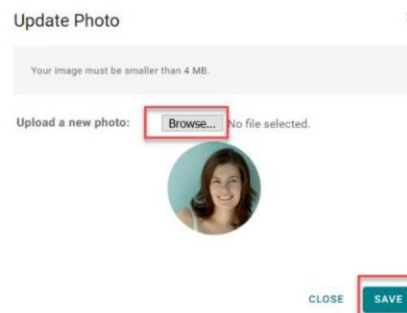
My Account

Change Profile Picture

- The patient can personalize their IntelliChart® account by adding a picture to their profile. To change profile picture, do the following:
- Click **My Account** and select **Upload Photo**



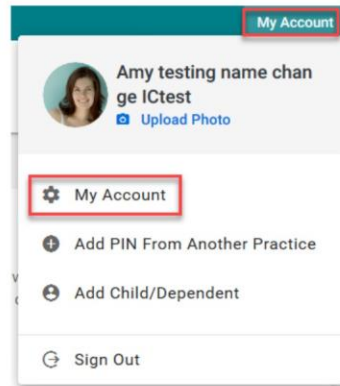
- Click **Browse** and choose the photo to upload as the profile picture; then click **SAVE**





Change Password

- Through the My Account page, the patient can change their email and/or Password and view and add any Associated Practices. The **My Account** page allows patients to adjust login settings and notifications.



- Click the **(Change)** link to the right of the email address to change the login email address

My Patient Portal Account

Email address	trainicportalmmary+30@gmail.com (Change)
	Change password
	Change security question
	Add PIN from another practice
Associated practices	Ballantyne Family Office

- Click **Change password** to change the password

My Patient Portal Account

Email address	trainicportalmmary+30@gmail.com (Change)
	Change password
	Change security question
	Add PIN from another practice
Associated practices	Ballantyne Family Office



Change Security Question

When the patient selects Change Security Question, a modal will display **Change security question**.

My Patient Portal Account

Email address trainicportalmmary+30@gmail.com [\(Change\)](#)

[Change password](#)

[Change security question](#)

[Add PIN from another practice](#)

Associated practices Ballantyne Family Office

Patient will be prompted to select a new **Security Question, Security Answer** and **Current Password**.

Change security question ×

Security Question

For your protection, this will help us identify you in the future.

Security Answer

Current password

[CLOSE](#) [UPDATE](#)

Add PIN from Another Practice

To add an additional Associated Practice click **Add PIN from another practice**.

My Patient Portal Account

Email address trainicportalmmary+30@gmail.com [\(Change\)](#)

[Change password](#)

[Change security question](#)

[Add PIN from another practice](#)

Associated practices Ballantyne Family Office



Notifications

On the My Account page the IntelliChart® Patient Portal allows the patient to set up notifications and reminders.

- Scroll down the My Account page to the **Notifications** section
- Patients do not have to enter a separate **Notification** email address. The email used for their login will be used
- Patient may adjust notifications by clicking **Edit notification settings** and add their cellular number for text messages

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by

Mobile: (123) 555-0100 [Edit notification settings](#)

Notification Event	Delivery Method	Details	Actions
Appointment Reminder	Text Message	2 days before	Delete notification
Cancel Appointment	Text Message		Delete notification

- Edit notification settings window displays.
- **Mobile** number for text message Notifications can be changed
- To change text message Notifications a cell service **Carrier** will be selected
- Click **SAVE NOTIFICATION SETTINGS**

Edit notification settings ×

Mobile

Carrier

CLOSE



The Patient Portal patient will add Notifications that are sent by clicking the **Add a Notification** link. The patient can also provide a Preferred contact method by selecting the drop down for **Send my Patient Portal Notifications by**.

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by Text

- Select One
- Call
- Text

Mobile: (123) 555-0100 [Edit notification](#) [Add a notification](#)

Notification Event	Delivery Method	Details	Actions

- The Patient Portal patient will select the **Notification Event** from the dropdown
- The **Delivery Type** will be selected (text, email, or both)
- **SAVE NOTIFIATION** will create the notification in the Patient Portal for the patient

Add Notification ×

Notification Event

- Select -

Delivery Type

- Select -

[CLOSE](#) [SAVE NOTIFICATION](#)

Notifications can be deleted by Patient Portal patients by clicking the **Delete notification** link.

Notifications for Amy testing name change ICtest

Send my Patient Portal Notifications by Text

Mobile: (123) 555-0100 [Edit notification settings](#) [Add a notification](#)

Notification Event	Delivery Method	Details	Actions
Appointment Reminder	Text Message	2 days before	Delete notification
Cancel Appointment	Text Message		Delete notification

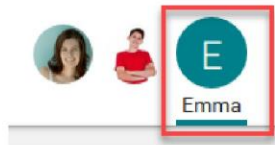


Proxy Associated Account

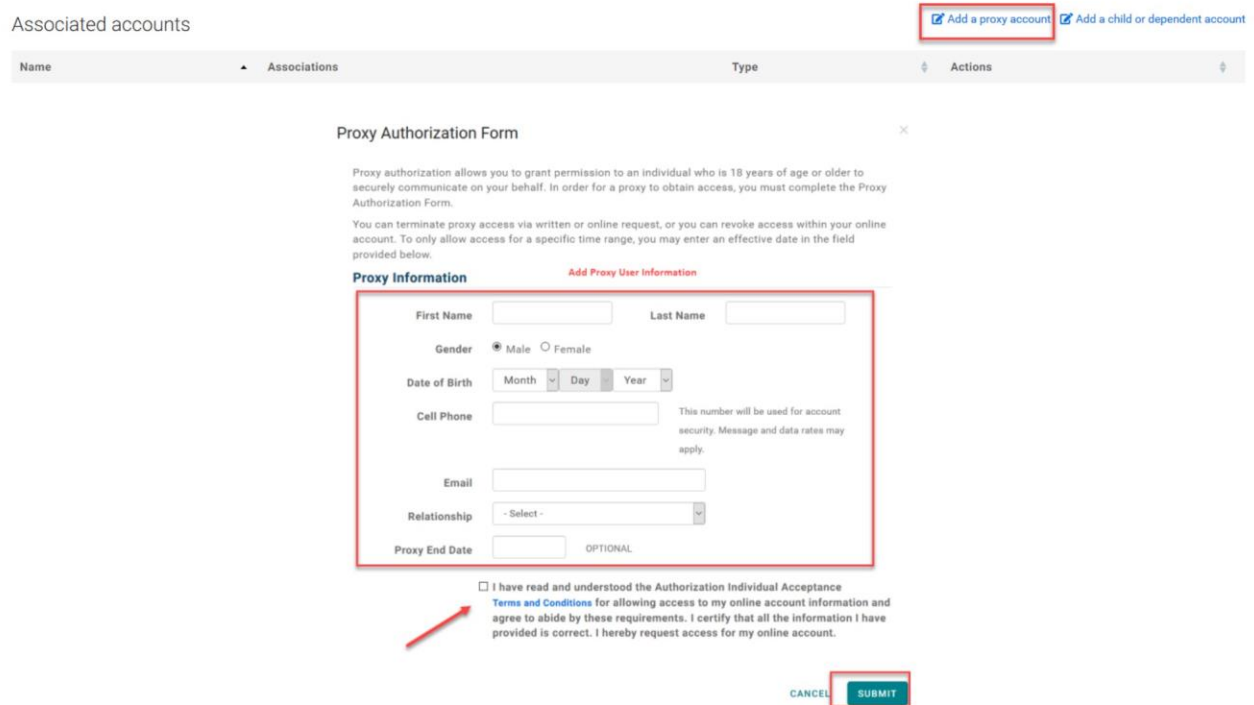
A Proxy User will display on the Patient Portal **My Account** page in the **Associated Accounts** section. The Patient Portal account user can remove a Proxy by clicking **Remove association**.



The Proxy User can access the Patient Portal account for the person that they are a proxy for by selecting the patient at the right top of the page. A green line under the name indicates what account the user is viewing.



The patient can also establish Proxy access from the Portal **My Account** page in the **Associated Accounts** section by clicking the **Add a Proxy Account** link.



When the patient clicks the **SUBMIT** button the same process previously discussed will allow the Proxy User to get an email to accept and verify the proxy access.



Note: Proxy invitation links not accessed within 48 hours will expire.