

Using the Premium Patient Portal

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Premium patient portal functionality must be activated by Sales as it is an additional cost. Call Sales at 866-847-3590. The premium patient portal allows the patient to enter their own demographic information into ICANotes. Practices can post or create fillable forms for patients to complete and sign directly to their chart and send email appointment reminders.

Activating Patient Portal

For each patient seen, you will need to do the following:

- Enter the patient's **Email** in Demographics.
- Make sure you are listed as the Assigned Provider.
- If you want an administrator to be able to send and receive secure messages to the patient, attach the administrator to the patient's chart as an assigned provider.
- Check the **Portal** box directly below the Email field to enable the patient's access to the portal.

Using the Premium Patient Portal

Demographics Go to E-Prescribe **DOB 6/18/1986**

Anaphylactic Reaction Reported Patient Reviewed Demographics

Patient Information	Insurance Information	Other Contacts
*Name (F, M, L, Suffix) John Smith	*Date of Birth 6/18/1986 Age: 29	Date Created 1/14/2016
Homeless <input type="checkbox"/> Bad Address <input type="checkbox"/> Sample <input type="checkbox"/> Chart <input type="checkbox"/>	Unique Patient ID 425	*Sex: M Red fields are Required
Address: _____ Addr 2 / Appt # _____ County _____	*Gender man	Refer to patient as Mr. Smith
City, State, Zip Owings Mills MD 21117	SSN # _____	Room: _____ MAR <input type="checkbox"/>
Home Phone 414-555-1122 Country US	Alt. Patient ID _____	Extra Privacy <input type="checkbox"/>
Work Phone _____ Maiden/Other Name _____		
Cell Phone _____		
Best Phone: <input type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Cell		
Patient Status: <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending	Patient's Condition	
Email johnsmith@gmail.com	Date Of Current Illness Onset _____ Date Of Similar Illness _____	
Email 2 _____	Date of Current Admission: From _____ To _____	
Portal <input checked="" type="checkbox"/> Reset PW	Dates Unable To Work: From _____ To _____	
Employment Status _____	Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
School or Employer _____	Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	State Of Accident _____
Grade _____	Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Marital Status _____	In treatment Previously? <input type="radio"/> Y <input checked="" type="radio"/> N If yes, where? _____	
*Ethnicity _____	Date Of Death _____ Preliminary Cause _____	
Religion _____		
Annual Household Income _____		
Family Size _____		
Veteran <input type="radio"/> Y <input checked="" type="radio"/> N	Release of Info _____ Adv. Dir. _____	
*Race _____	Patient Calendar Note _____ Miscellaneous Notes _____	
Race 2 _____		
*Preferred Language _____		

Assigned Providers Joy Test4 Role **Principal**

are allowed to sign _____

Notes for this Patient _____

< Select a Clinician > **Assign Provider**

Where Seen Med Record # _____

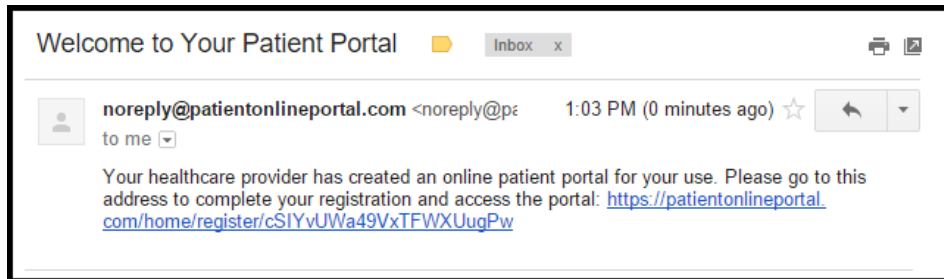
Add New Location _____

Telephone Intake Form **Continue**

Print Patient Demographics

Save As PDF: Demographics

The patient will receive the following email invitation to register for an account on the patient portal:



The email invitation does not identify the name of your practice. This is to protect the patient's privacy. You will want to make sure the patient is aware of the portal and how to use it. Please provide patients with the Patient Portal Instructions and encourage them to register and login.

You will be able to monitor whether or not a patient has accessed the portal from the Patient Information screen in Demographics. If the patient has registered and logged in successfully, these words will appear next to the portal field: *patient has accessed portal. A **Reset PW** button will also appear. If the patient needs to have their portal password reset, you can do that for them by clicking the **Reset PW** button.

Email **johnsmith@gmail.com**

Email 2 _____

Portal **Reset PW** *patient has accessed portal

Using the Premium Patient Portal

Patient Portal

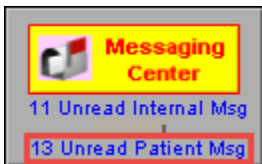
NOTE: CCDAs will only be generated for notes created AFTER you have enabled portal access for the patient in Demographics.

Regularly check the **Patient Portal** section of the Messaging Center for secure messages from your patients.

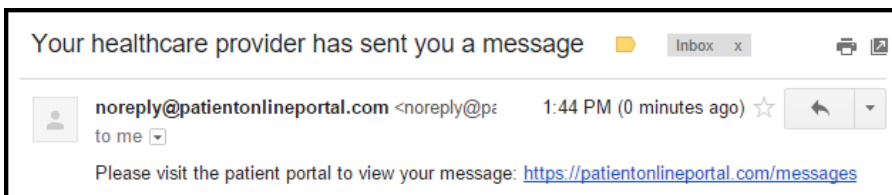
The screenshot shows the Messaging Center interface. At the top, there are two tabs: "Internal Messages" and "Patient Portal", with "Patient Portal" selected. Below the tabs, there is a section for "Patient Portal For: Joy Test4". To the left is a file drawer with "Inbox" and "Sent" folders. To the right are buttons for "Create a New Message", "Select / Unselect Messages", and "Delete Selected Messages". A table of messages is displayed with columns for "Select", "Patient", "Subject", "Sent", and "Print".

Select	Patient	Subject	Sent	Print
<input type="checkbox"/>	Eric Cartman	Is this a side effect of my medication?	1/14/2016 1:40:57 PM	
<input type="checkbox"/>	Alphabet Test	Appointment Confirmed	12/23/2015 4:36:22 PM	
<input type="checkbox"/>	Jane Doe	Appointment Cancellation Requested	12/23/2015 2:59:08 PM	

Note: The Messaging Center file drawer in the Chart Room will have a blue alert if patient messages have been received from the portal.

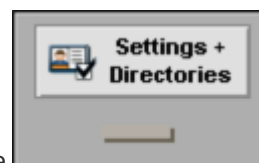


When you reply to a secure message from a patient, they will receive an email at their regular email address notifying them to check the portal for a secure message from their provider.



Premium Patient Portal Admin Function

Set Up



1. To set this up, you need to go to Settings + Directories. Click the  drawer from the Chart Room.

Using the Premium Patient Portal

2. Click the **Security Center** button.

3. Enter your password.



Enter Password

Enter your password to access the Security Center.

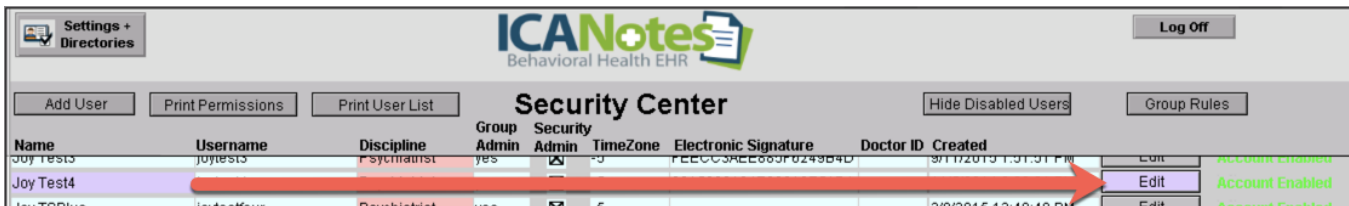
Account Name: joytest4

Password

OK

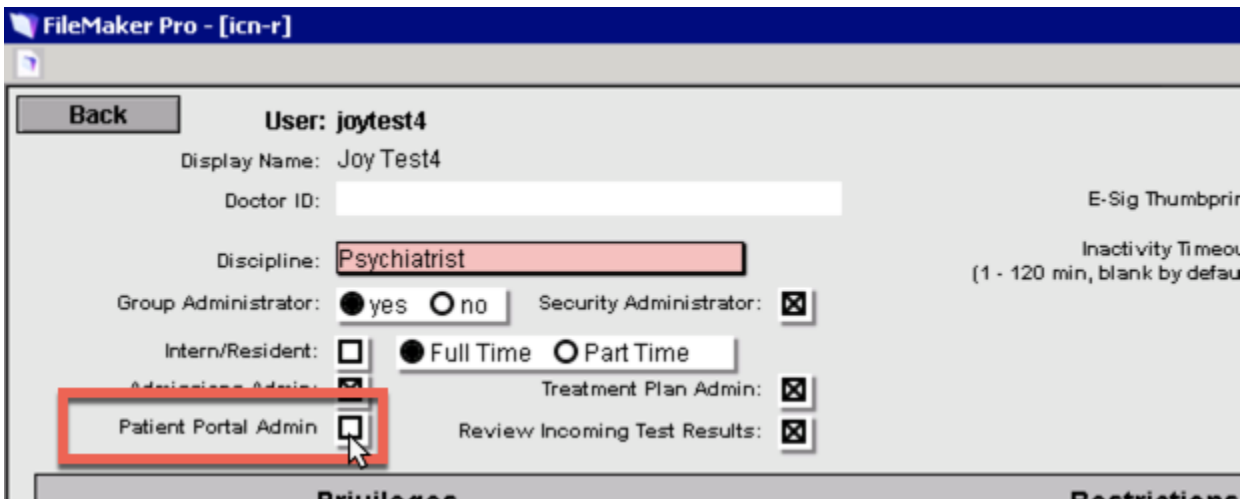
4. Click the **OK** button to continue.

5. In the Security Center, find the name of the person who will take the role of Patient Portal Admin and click the **Edit** button in the right column. (Note: If you are setting another user to be the Patient Portal Admin, the **Edit** button will be grey.)



Name	Username	Discipline	Group Admin	Security Admin	TimeZone	Electronic Signature	Doctor ID	Created	Edit	Account Status
Joy Test4	joytest4	Psychiatrist	yes	<input checked="" type="checkbox"/>	EST	EECC3AE683F6249B4D		9/17/2015 1:31:31 PM	Edit	Account Enabled
Joy Test4	joytest4	Psychiatrist	yes	<input checked="" type="checkbox"/>	EST			9/17/2015 12:49:40 PM	Edit	Account Enabled

6. In the top left corner, click the 'Patient Portal Admin' checkbox to turn on the feature.



FileMaker Pro - [icn-r]

Back **User: joytest4**

Display Name: Joy Test4

Doctor ID:

Discipline:

Group Administrator: yes no Security Administrator:

Intern/Resident: Full Time Part Time

Admissions Admin: Treatment Plan Admin:

Patient Portal Admin Review Incoming Test Results:

Privileges Restrictions

Using the Premium Patient Portal

7. Click the **Save** button to save the change.

The screenshot shows a user profile configuration page for 'User: joytest4'. The page includes fields for 'Display Name: Joy Test4', 'Doctor ID', 'Discipline: Psychiatrist', and 'Inactivity Timeout: 120'. There are checkboxes for 'Group Administrator', 'Security Administrator', 'Intern/Resident', 'Admissions Admin', 'Treatment Plan Admin', and 'Patient Portal Admin'. A 'Restrictions' table is visible, and a red arrow points to the 'Save' button at the bottom of the form.

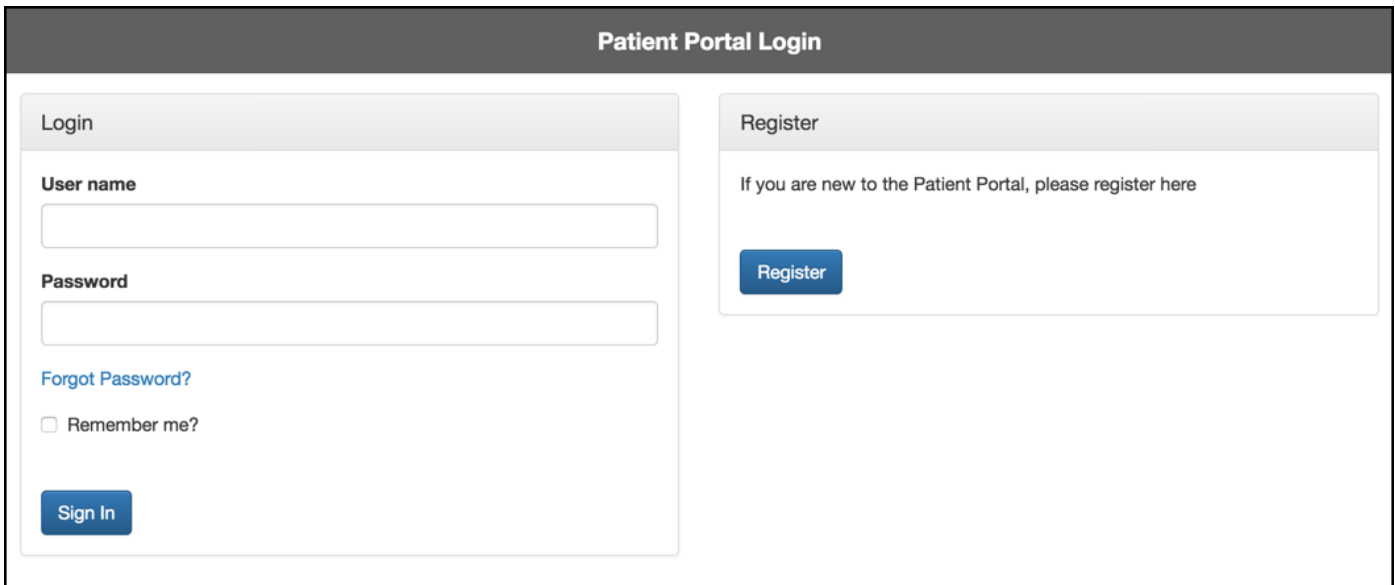
Privileges		On	Off	Restrictions		On	Off
create new patient		<input checked="" type="radio"/>	<input type="radio"/>	restrict to delete just their own notes		<input type="radio"/>	<input checked="" type="radio"/>
assign provider to any chart		<input checked="" type="radio"/>	<input type="radio"/>	restrict search to site assignments		<input type="radio"/>	<input checked="" type="radio"/>
create new record existing patient		<input checked="" type="radio"/>	<input type="radio"/>	restrict to their own calendar events		<input type="radio"/>	<input checked="" type="radio"/>
add/edit rx		<input checked="" type="radio"/>	<input type="radio"/>	restrict to their own calendar		<input type="radio"/>	<input checked="" type="radio"/>
print rx		<input checked="" type="radio"/>	<input type="radio"/>	restrict from making patient inactive		<input type="radio"/>	<input checked="" type="radio"/>
compile a note		<input checked="" type="radio"/>	<input type="radio"/>	not allowed to assign supervisors		<input type="radio"/>	<input checked="" type="radio"/>
generate a report		<input checked="" type="radio"/>	<input type="radio"/>	not allowed to delete in Patient Accounts		<input type="radio"/>	<input checked="" type="radio"/>
delete chart		<input checked="" type="radio"/>	<input type="radio"/>	restrict access to Documents tab		<input type="radio"/>	<input checked="" type="radio"/>
delete note		<input checked="" type="radio"/>	<input type="radio"/>	not allowed to edit patient insurance		<input type="radio"/>	<input checked="" type="radio"/>
navigate to patient accounts		<input checked="" type="radio"/>	<input type="radio"/>				
navigate to calendar		<input checked="" type="radio"/>	<input type="radio"/>				
access any chart		<input checked="" type="radio"/>	<input type="radio"/>				
temporary emergency access		<input type="radio"/>	<input checked="" type="radio"/>				
see billing rates & claim charges		<input checked="" type="radio"/>	<input type="radio"/>				
navigate to MAR		<input checked="" type="radio"/>	<input type="radio"/>				
lock MAR record		<input checked="" type="radio"/>	<input type="radio"/>				
allow MAR entry on any date		<input checked="" type="radio"/>	<input type="radio"/>				
add/edit calendar event		<input checked="" type="radio"/>	<input type="radio"/>				
enter diagnosis by code		<input checked="" type="radio"/>	<input type="radio"/>				

This user is now ready for Patient Portal Admin functionality.

How to Make Changes to the Portal Landing Page

1. As a Patient Portal Admin, go to <https://patientonlineportal.com> and log in using your ICANotes user name and password.

Using the Premium Patient Portal



The image shows a web form titled "Patient Portal Login". It is divided into two main sections: "Login" and "Register".

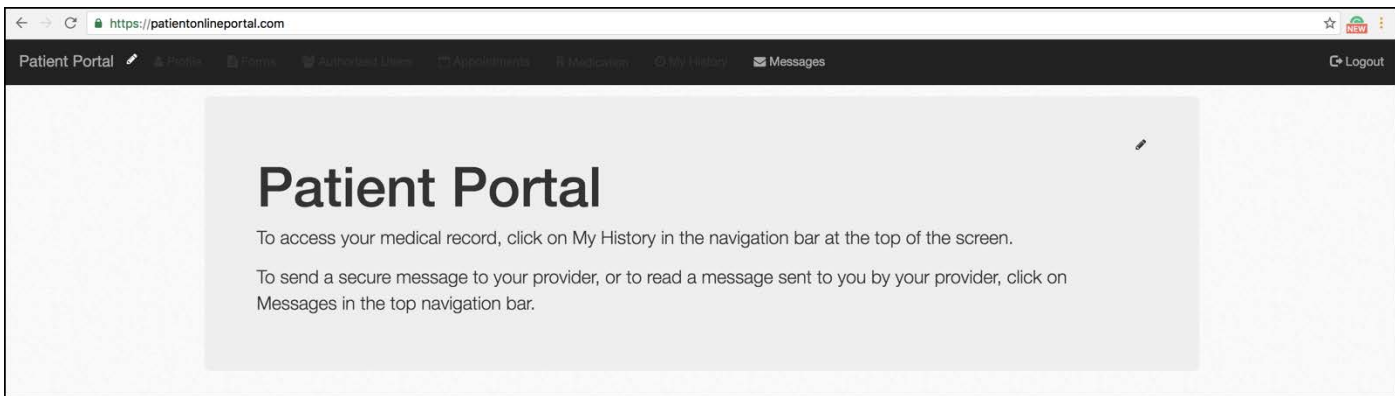
Login Section:

- Header: "Login"
- Field: "User name" with an input box.
- Field: "Password" with an input box.
- Link: "Forgot Password?"
- Checkbox: "Remember me?"
- Button: "Sign In"

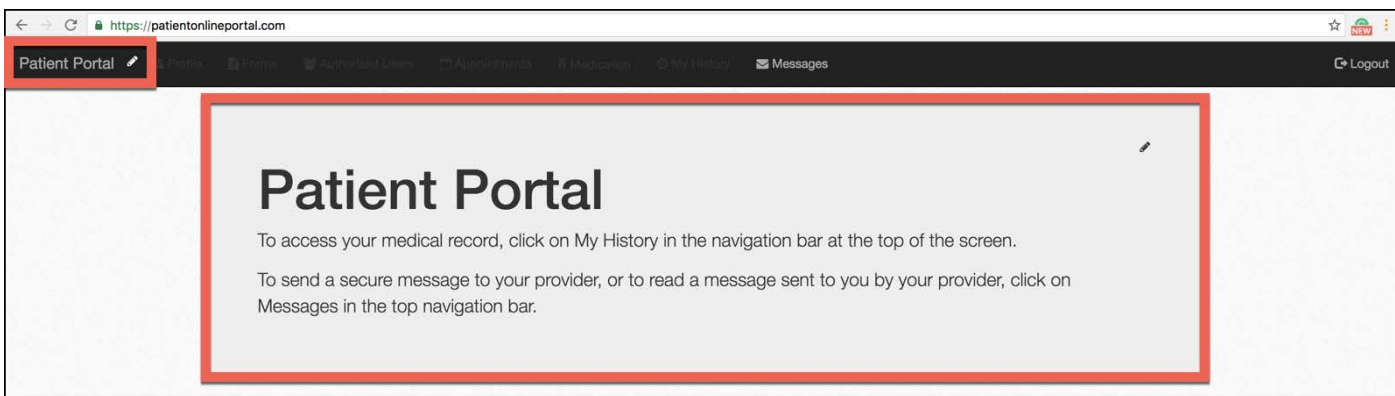
Register Section:


- Header: "Register"
- Text: "If you are new to the Patient Portal, please register here"
- Button: "Register"

2. You will be logged into the default Patient Portal with areas that can be edited.




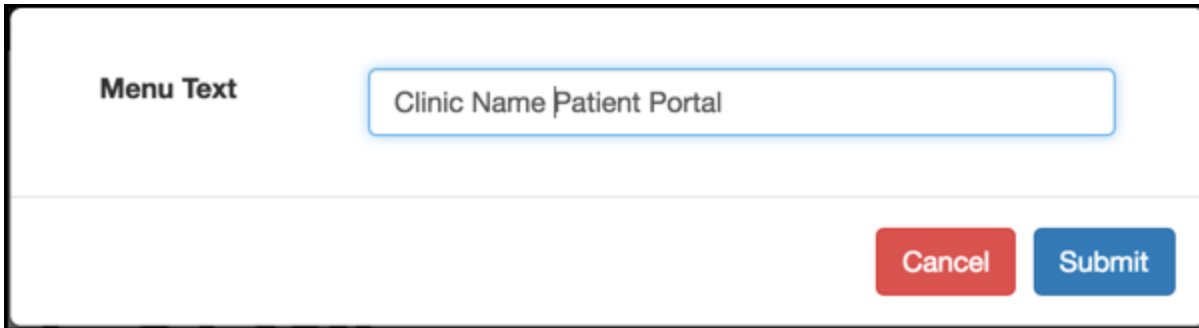
3. On the main page, you can change the name of the Patient Portal and the welcome message.



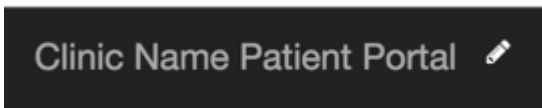
4. Click the pencil icon  in the top left to change the name of the Patient Portal.


Using the Premium Patient Portal


5. When the Menu Text popup window populates, change the name to what you would like it called. In this example, I added "Clinic Name" to the title. Click the  button to save the changes.

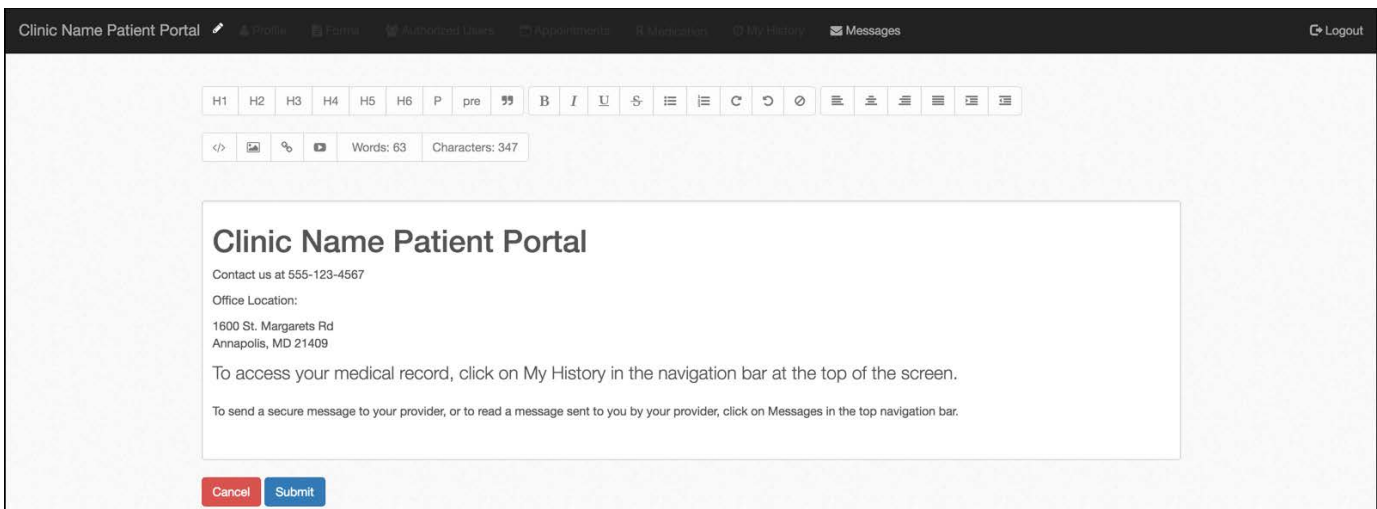


6. The name at the top will be changed.



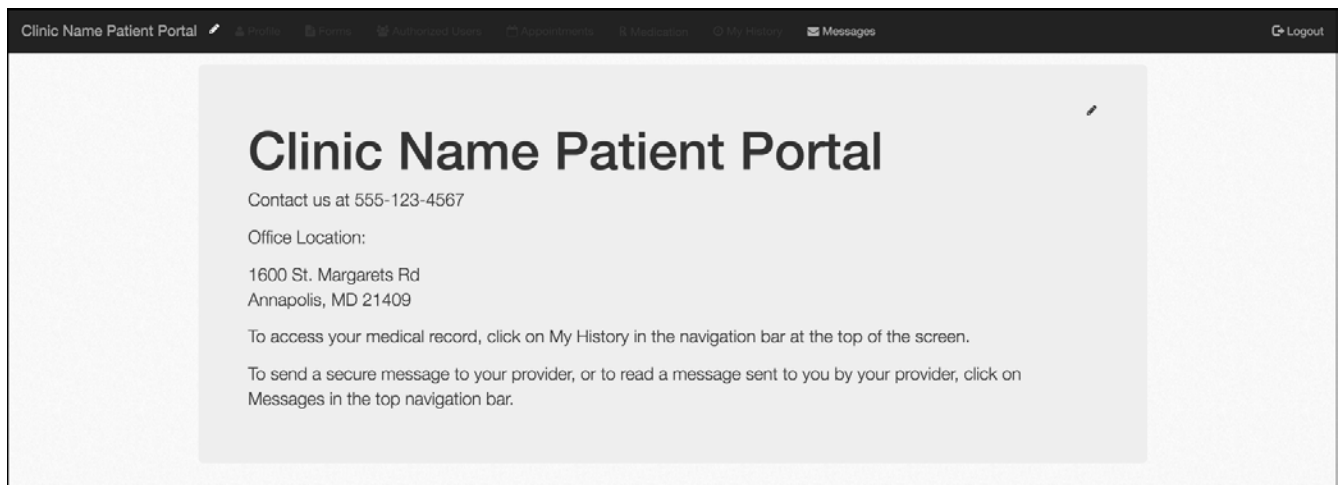
7. Click the pencil icon  in the middle of the webpage to change the welcome message.

8. When the webpage goes to the edit screen, make the changes to the message as desired. Click the  button to save the changes.

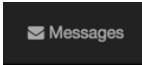


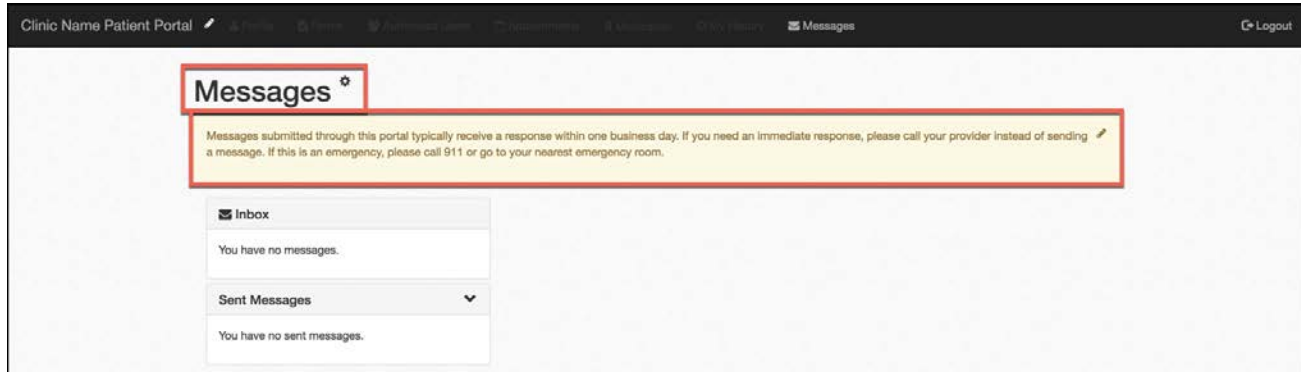
9. The Portal Landing Page message will now be changed.



Using the Premium Patient Portal

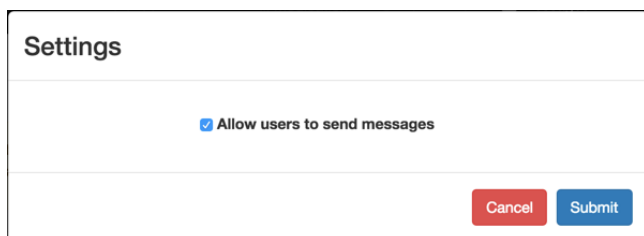


How to Turn On/Off Messages and Disclaimer


1. Click the  button at the top to go to the next area that can be modified.
2. You can turn the Messages on/off from this location as well as change the disclaimer message that appears in the yellow area.




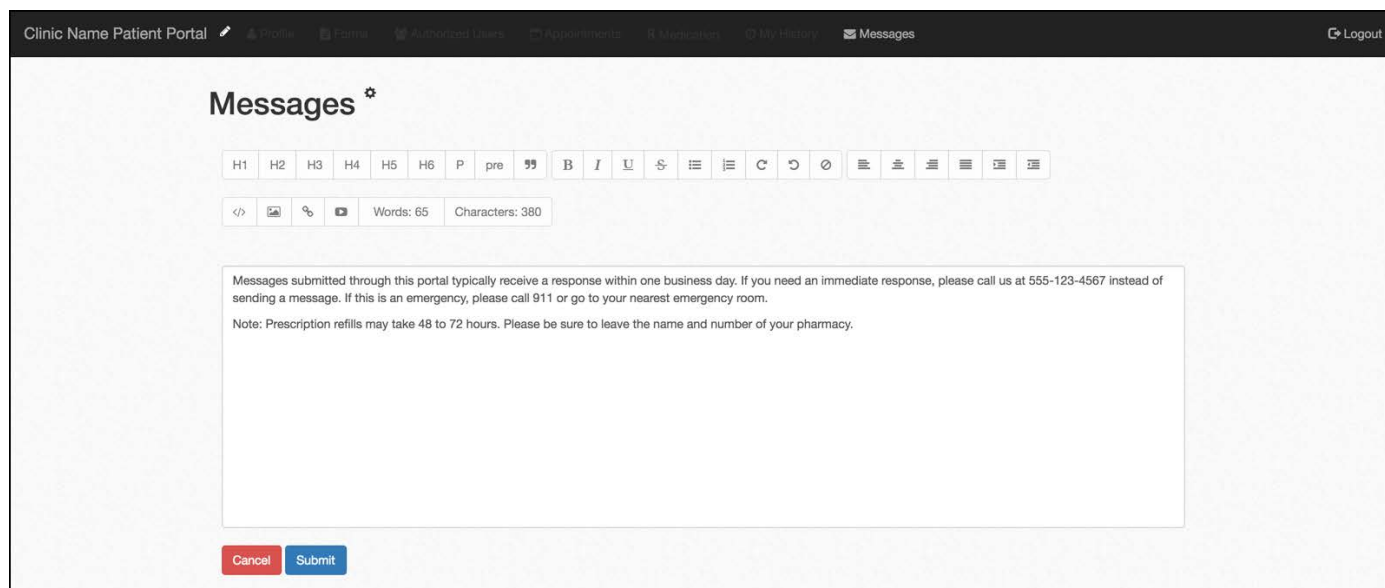
3. To turn off the Messages, click the  icon.
4. Default setting is for messages to be on. To turn it off, uncheck the 'All users to send messages' field. Click the  button.



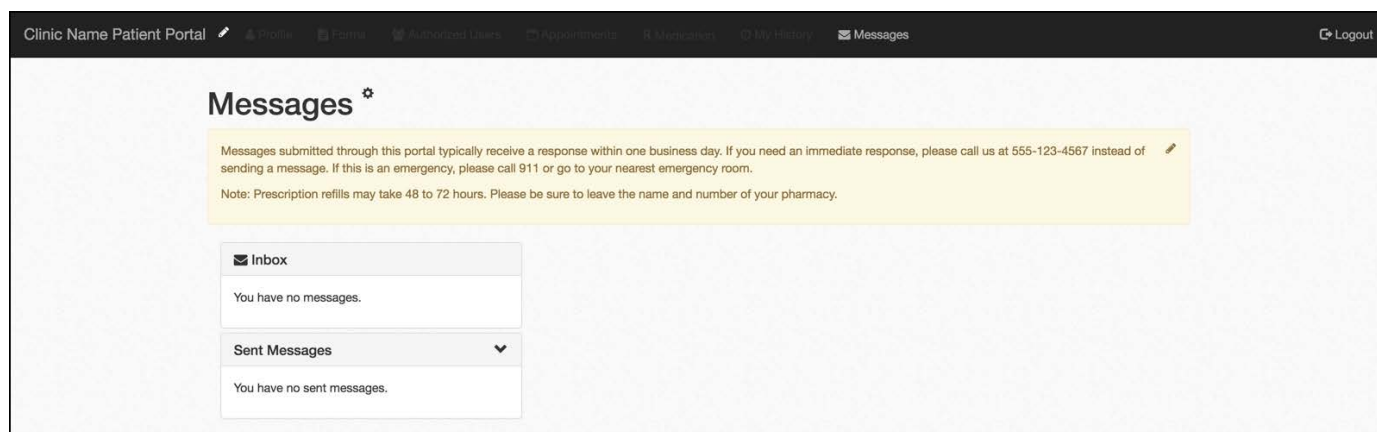
Using the Premium Patient Portal

5. To change the disclaimer message that appears in the yellow area, click the  icon.

6. When the webpage goes to the edit screen, make the changes to the message as desired. Click the  button to save the changes.



7. The disclaimer message will now be changed.



Mass Portal Messaging

1. Click the  buttons on the top.

Using the Premium Patient Portal

Hokey Pokey Counseling Profile Forms Authorized Users Appointments Medication My History Messages **Admin Tools** Logout

Mass Portal Messaging

SMS Reminder Settings

Forms Builder

Patient Form Manager

Portal message history

Sender	Date Sent	Subject
Moody, Jane	10/31/2016 10:14 AM	Holiday Schedule
Moody, Jane	01/09/2017 11:01 AM	Medication Refills

* All times are in ET.

Send portal message to all patients

Subject

Message

Cancel Send

2. Type in a Subject and Message.

Send portal message to all patients

Subject

Holiday Schedule

Message

Please note the following days that our office will be closed:

Thursday, November 24, 2016
Friday, November 25, 2016
Monday, December 26, 2016

Cancel Send

3. Click the  button to send the message.



4. Your message will be sent to all patients and show the date sent under Portal message history.

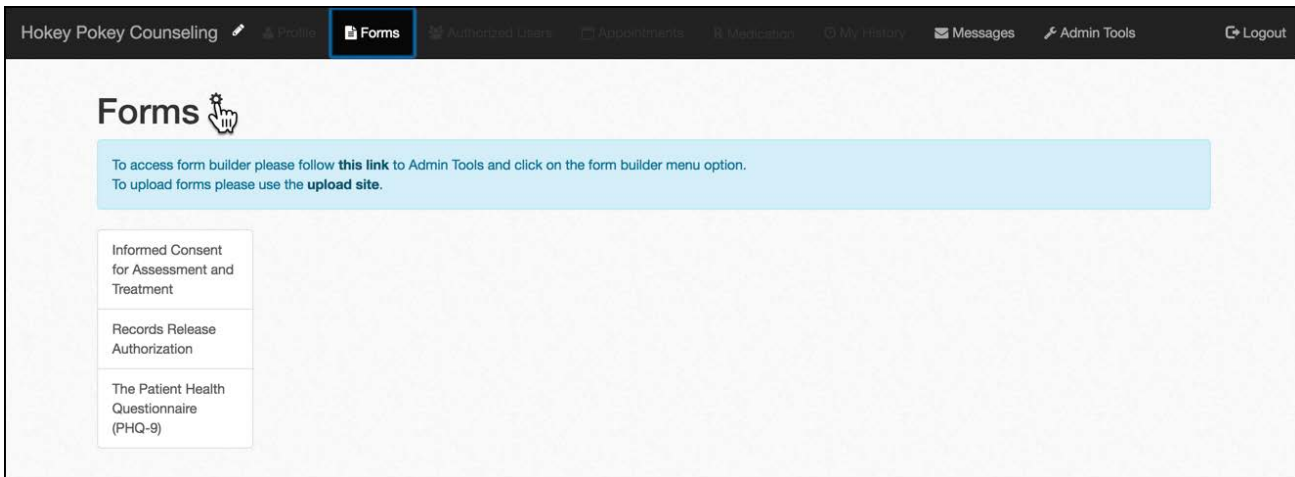
Using the Premium Patient Portal

Portal message history		
Sender	Date Sent	Subject
Moody , Jane	10/31/2016 10:14 AM	Holiday Schedule
Please note the following days that our office will be closed: Thursday, November 24, 2016 Friday, November 25, 2016 Monday, December 26, 2016 Monday, January 2, 2017		
Moody , Jane	01/09/2017 11:01 AM	Medication Refills

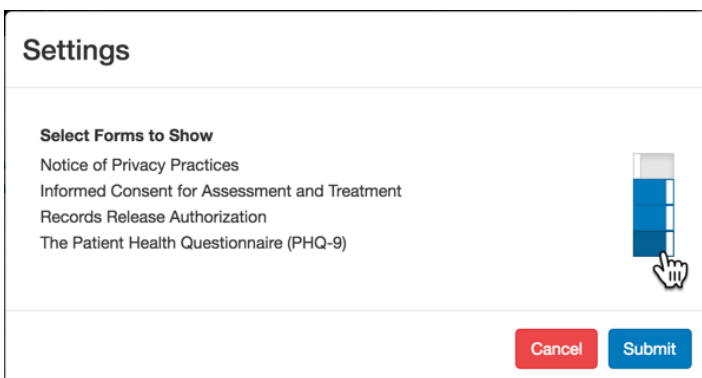
** All times are in ET.*

How to Change Form Visibility


1. Click the  button on the top.
2. Click the  icon.



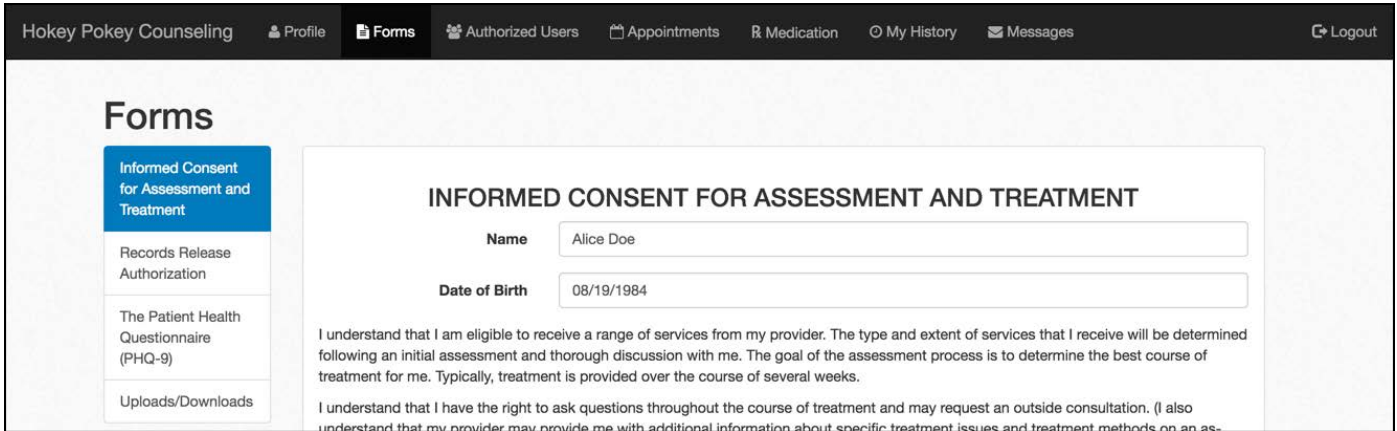
3. Select the forms that you would like to show.



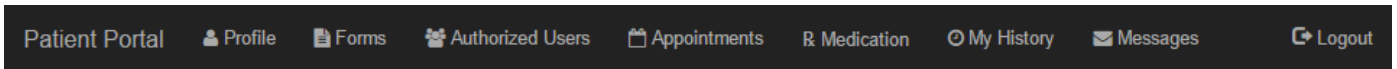
Using the Premium Patient Portal

4. Click the  button to save settings.

5. The selected forms will now show under Forms.



Premium Patient Portal Features



Demographics Entry

After registering on the Patient Portal, a patient can fill out their demographic information in the Profile section. When saved, the demographics are sent to ICANotes for your review. You can review and choose (via checkboxes) which fields to post to the demographics section of the patient chart. Your patients also have the ability to update their demographic information through the patient portal.

Using the Premium Patient Portal

Patient Portal **Profile** Forms Authorized Users Appointments Medication My History Messages Logout

Profile

Patient Information

Current Information Patient History

Name Eric Cartman

Address 28201 Coon Lane

Address 2

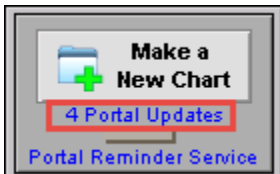
City South Park

State CO

ZipCode 80201

Note: Insurance information cannot be entered via the portal at this time. This will be in a future release.

When a patient makes changes to his/her profile, an alert appears in the Chart Room indicating that a portal update has been made and requires review.



Clicking on the blue alert will open the Patient Portal Reconciliation window.

PATIENT PORTAL RECONCILIATION Back

Patients Submitting Demographic Changes:

First Name	Last Name	
Teresa	Red	➔
The	Doctor	➔
Amber	McCann	➔
Samantha	Georgia	➔

INSTRUCTIONS:

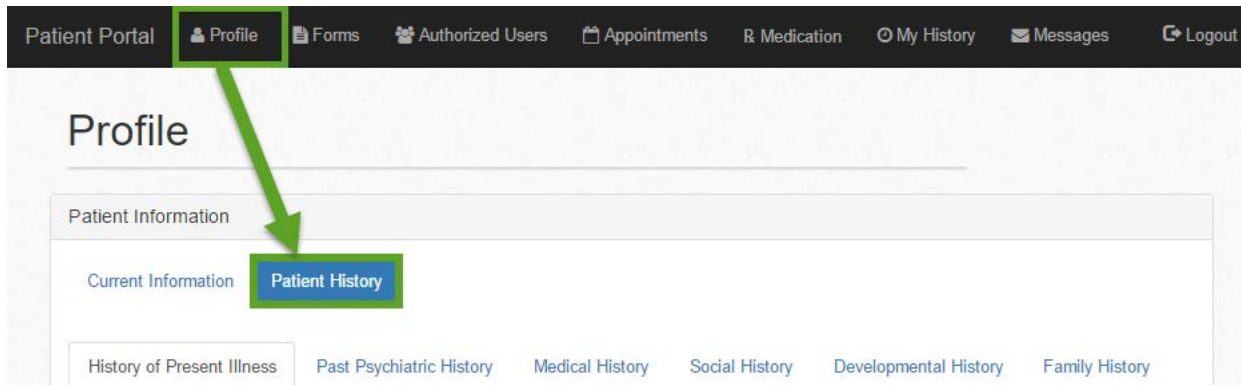
1. Patients listed have each submitted changes to demographics through the Patient Portal.
2. Reconcile patient's demographics by clicking the green Arrow. The Patient Portal data will be displayed on the left and the current data within ICANotes will appear on the right for comparison.

Selecting a patient from the left-hand column and clicking the green arrow to the right of his/her name will display a list of changes entered by the patient on his/her profile.

Using the Premium Patient Portal

Portal Intake

1. Your patient can access the Patient History form from the Patient Portal – Profile tab.

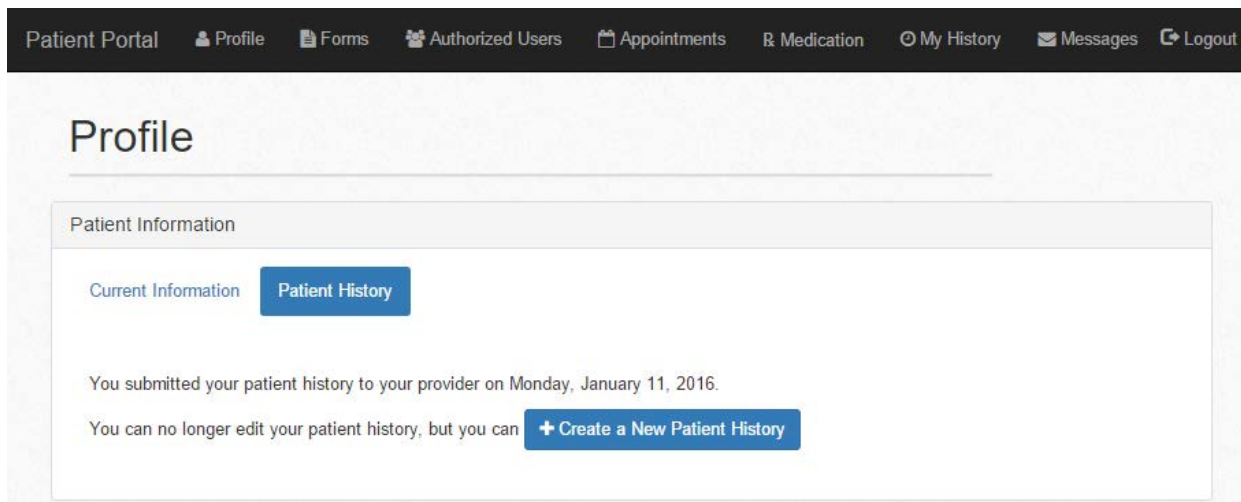


2. The patient should start on the History of Present Illness tab by filling in all applicable areas.

3. Once he/she reaches the bottom of the report, select **Save for later** to save progress or click **Continue** to go to the next tab. The **Back** button will bring the patient back to the previous tab.

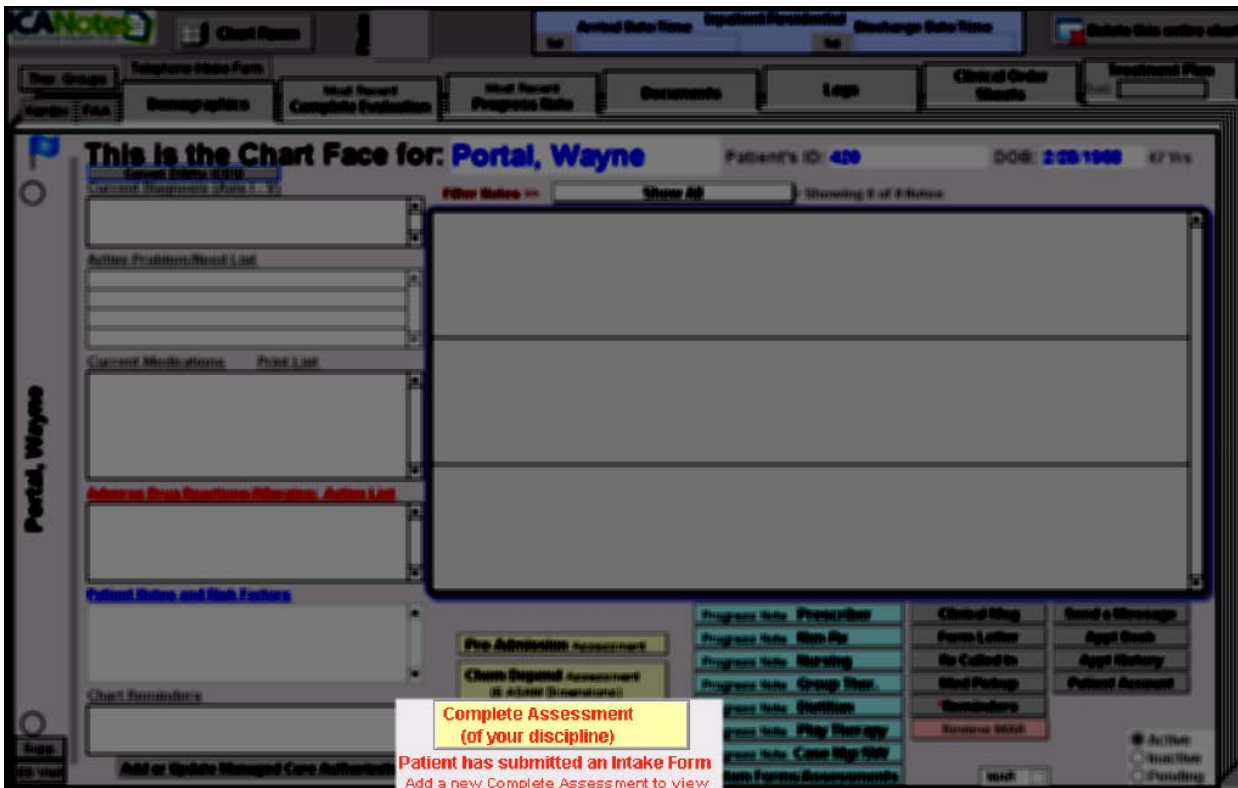
4. After the patient has completed all tabs, the Family History tab will have a **Submit** button.

5. After being submitted, this message will show for the patient.

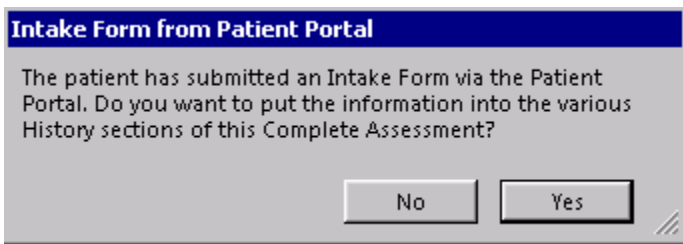


6. Once submitted by the patient, on the ICANotes Chart Face, this will show under the **Complete Assessment (of your discipline)** button.

Using the Premium Patient Portal



7. When the **Complete Assessment (of your discipline)** button is pressed, this popup will populate.



8. Click **Yes** to auto-populate the patient's responses to the Complete Assessment.

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PAST PSYCHIATRIC HISTORY:

History provided by patient on 1/11/2016 5:14:20 PM:
Outpatient Treatment:
The patient has never received outpatient mental health treatment.

Psychiatric Hospitalization:
The patient has never been psychiatrically hospitalized.

Psychotropic Medication History:
The patient has never taken any psychotropic medications.

Addiction/Use History:
The patient denies any history of substance abuse.

Acting Out:
The patient indicates the following emotional/behavioral problems: Violent temper

SOCIAL/DEVELOPMENTAL HISTORY:

History provided by patient on 1/11/2016 5:14:20 PM:
Childhood history:
Sister(s) was present entire childhood. Brother(s) was present entire childhood.

Current Social Factors:
The patient describes his/her current living situation as housing is adequate.

Pregnancy and Developmental Histories:
The patient was the product of a Normal delivery. There were no post-partum complications.

Development:
The patient passed the various developmental milestones at age appropriate times.

Clicking will open up a Complete Assessment without the patient-provided intake form contents.

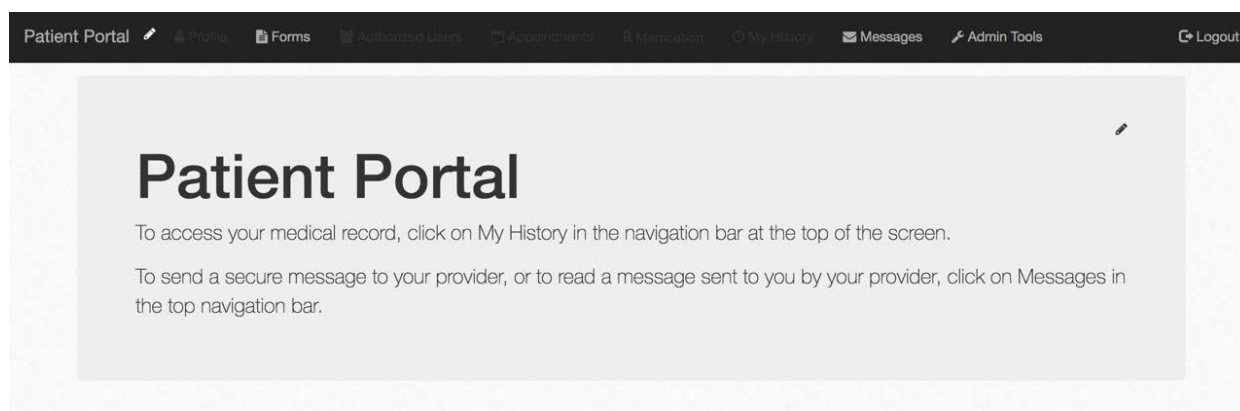
Forms Builder

Practices using the Premium Patient Portal can create a form or post forms for patients to download from the portal so that they can be completed prior to their appointment.

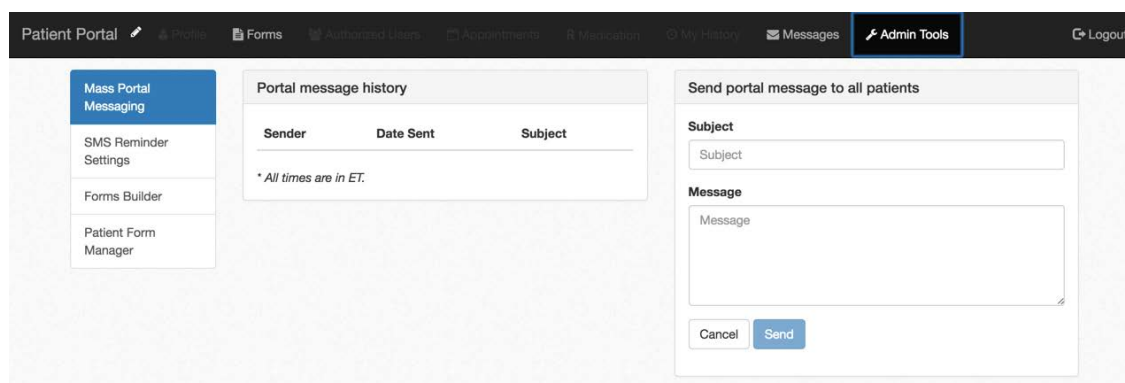
Creating a Form

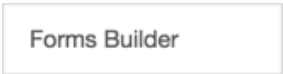
1. As a Portal Admin, log into the Patient Portal at <https://patientonlineportal.com>.

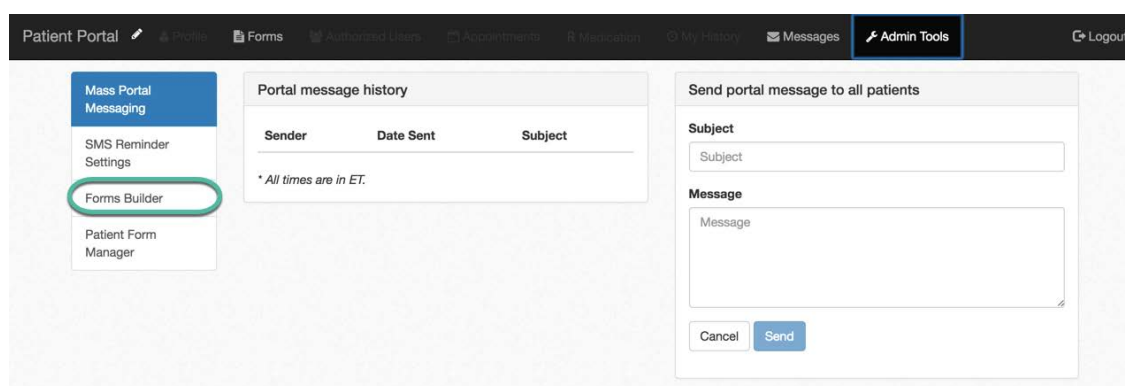
Using the Premium Patient Portal



2. Click the  link.

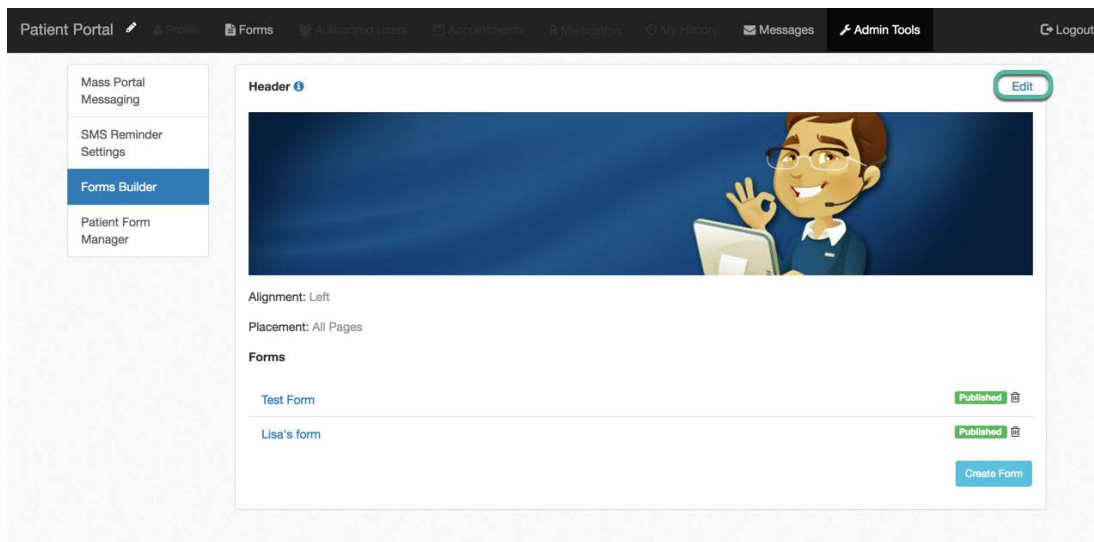


3. Select the  button.

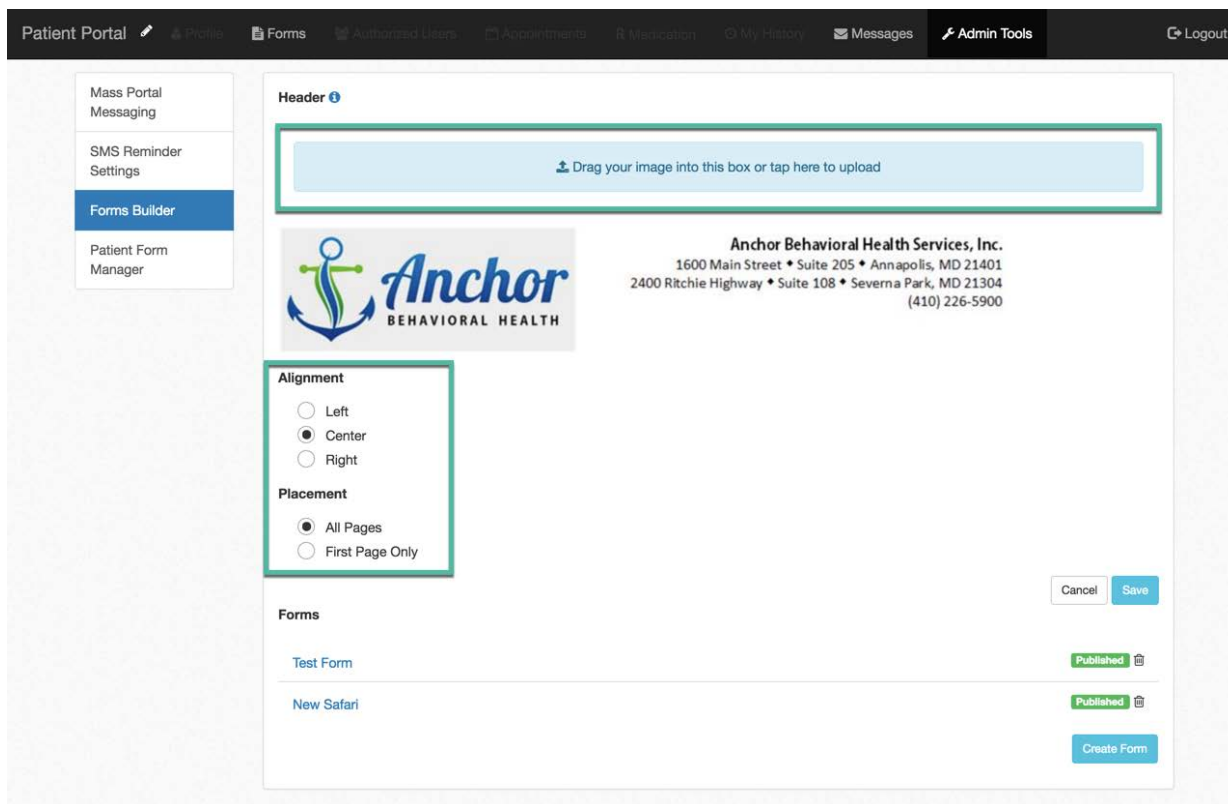


4. (Steps 4 through 7 are optional - only required if you want to use a Header.) Click [Edit](#) in the top right to set the Header. The Header is an excellent place to put your logo.

Using the Premium Patient Portal



5. (Skip if not creating a Header.) Drag an image into the box (or tap the blue bar to upload).

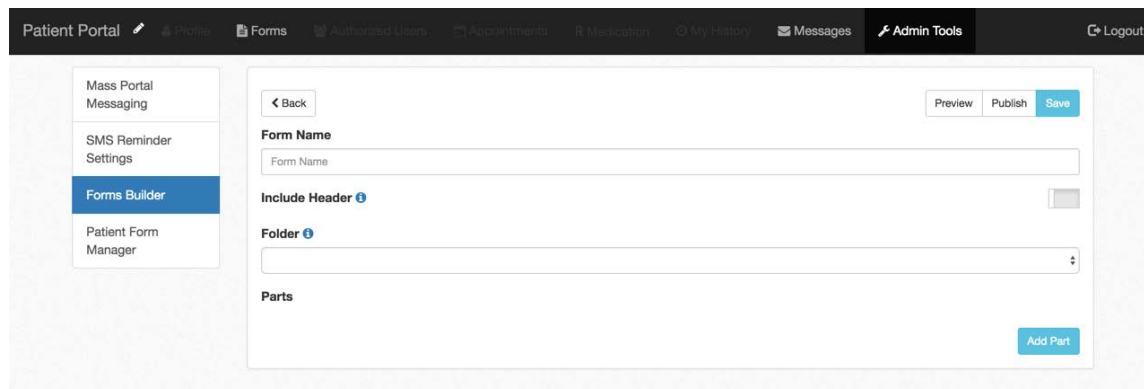


6. (Skip if not creating a Header.) You can adjust Alignment and Placement. Shown above, the header will be aligned in the center and the header will show on each page.

7. (Skip if not creating a Header.) Once the Header is set up, click the  button.

Using the Premium Patient Portal

8. Click the  button.



9. Type in a Form Name.

Form Name

10. Include Header turn on/off using the slider. (Header created in steps 4 through 7 above)

Include Header ⓘ



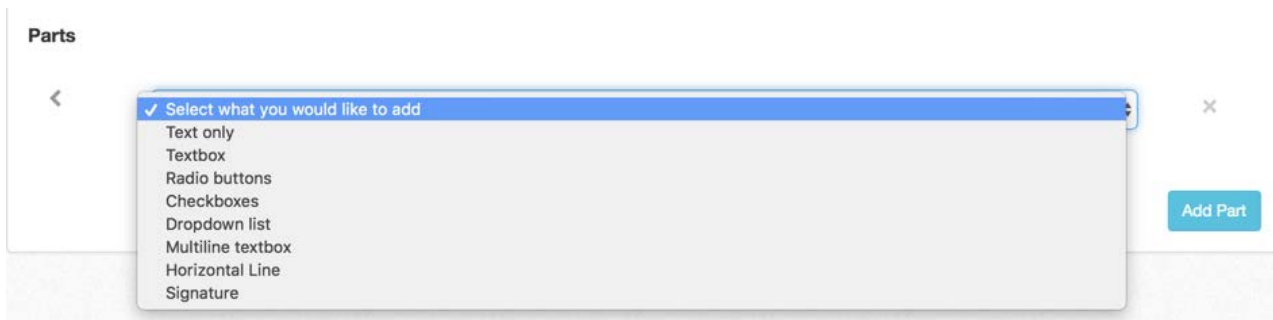
11. Choose which Folder you want the form in. This is where the form will be found in the Upload Site and ICANotes.

Folder ⓘ

12. In the Parts section, click the  button. This is where you create the content of the form.

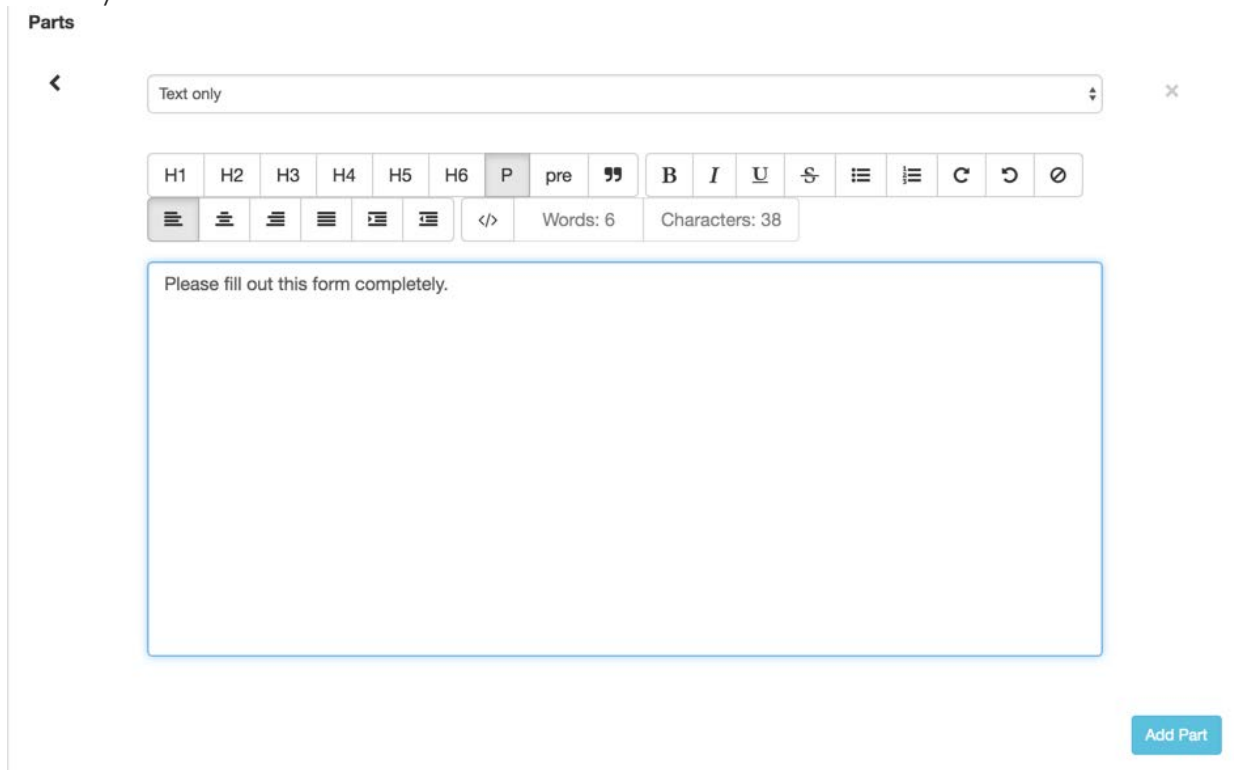
13. Choose the first section of the form from the dropdown menu.

Using the Premium Patient Portal



14. Click [Add Part](#) button to continue creating the form.

- Text only selection:



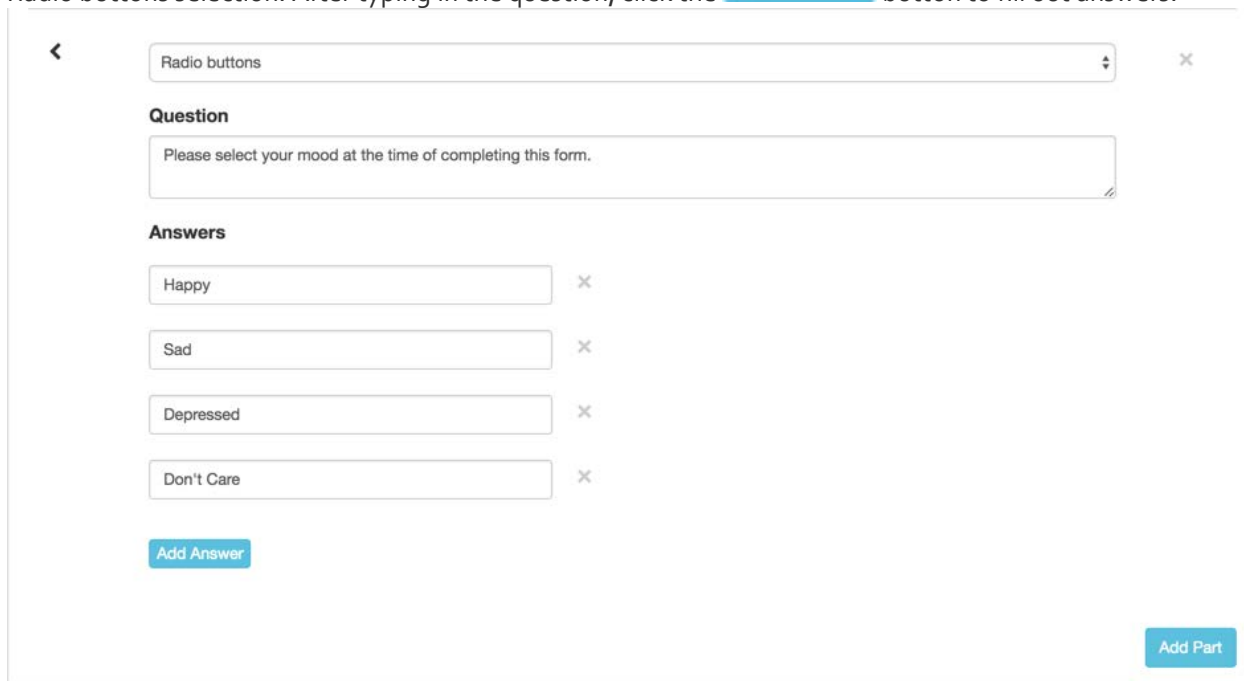
Using the Premium Patient Portal

- Textbox selection:



The screenshot shows a 'Parts' section in the Premium Patient Portal. At the top left, there is a back arrow and a dropdown menu labeled 'Parts' with 'Textbox' selected. To the right of the dropdown is a close button (X). Below the dropdown is a 'Question' field containing the text 'Did you find this form easy to fill out?'. At the bottom right of the form is a blue 'Add Part' button.

- Radio buttons selection: After typing in the question, click the **Add Answer** button to fill out answers.



The screenshot shows a 'Radio buttons' selection in the Premium Patient Portal. At the top left, there is a back arrow and a dropdown menu labeled 'Radio buttons' with 'Radio buttons' selected. To the right of the dropdown is a close button (X). Below the dropdown is a 'Question' field containing the text 'Please select your mood at the time of completing this form.'. Below the question field is an 'Answers' section with four input fields: 'Happy', 'Sad', 'Depressed', and 'Don't Care'. Each input field has a close button (X) to its right. At the bottom left of the form is a blue 'Add Answer' button, and at the bottom right is a blue 'Add Part' button.

Using the Premium Patient Portal

- Checkboxes selection: After typing in the question, click the **Add Answer** button to fill out answers.

The screenshot shows a form titled "Checkboxes" with a back arrow on the left and a close "X" on the right. Below the title is a "Question" field containing the text "Please select which meals you have consumed since you woke up." Underneath the question is an "Answers" section with six input fields, each with a close "X" button on its right side. The input fields contain the following text from top to bottom: "Breakfast", "Brunch", "Lunch", "Snack", "Supper", and "Snack". At the bottom left of the form is a blue "Add Answer" button, and at the bottom right is a blue "Add Part" button.

- Dropdown list selection: After typing in the question, click the **Add Answer** button to fill out answers.

The screenshot shows a form titled "Dropdown list" with a back arrow on the left and a close "X" on the right. Below the title is a "Question" field containing the text "Please choose the statement that best defines your goal in therapy." Underneath the question is an "Answers" section with five input fields, each with a close "X" button on its right side. The input fields contain the following text from top to bottom: "To feel better about me", "To feel better about my family", "To feel better about people in my life", "To feel better about every day", and "To stop feeling depressed". At the bottom left of the form is a blue "Add Answer" button.

Using the Premium Patient Portal

- Multiline textbox selection:

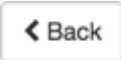




The screenshot shows a 'Parts' selection interface. At the top left, there is a left-pointing arrow. Below it is a dropdown menu with 'Multiline textbox' selected. To the right of the dropdown is a close button (X). Below the dropdown is a 'Question' field containing the text 'This is for multiple lines of text.' At the bottom right, there is a blue 'Add Part' button.

- Horizontal Line selection: While this does not show the horizontal line, on the preview/published form it will show the line.

The screenshot shows a 'Parts' selection interface. At the top left, there is a left-pointing arrow. Below it is a dropdown menu with 'Horizontal Line' selected. To the right of the dropdown is a close button (X). At the bottom right, there is a blue 'Add Part' button.

- Signature selection: This adds an area where the patient can sign using his/her mouse.

The screenshot shows a 'Parts' selection interface. At the top left, there is a left-pointing arrow. Below it is a dropdown menu with 'Signature' selected. To the right of the dropdown is a close button (X). Below the dropdown is a 'Question' field containing the text 'Please sign below using your mouse to confirm your answers.' At the bottom right, there is a blue 'Add Part' button.


- The  button will cancel all changes and go back to Forms Builder page.
- Clicking the  arrow on the left of the selection, will cause the Parts selection to collapse to  icon. When this icon shows, you are able to move around the Parts selection. (This does not appear for Edge, IE, Safari, and mobile devices. For these browsers/mobile device, use the   to move up or down.)


Using the Premium Patient Portal



- Hover over the icon, and the crossbar will show as shown.
 - Once the crossbar shows, you can drag the Part to another area.



- Clicking the  button will delete the selection.

Clicking the  button will copy the selection and place at the bottom of the Parts area.

The screenshot shows the 'Parts' area with a list of items. At the bottom, a rich text editor is open, showing a toolbar with various formatting options (H1-H6, P, pre, bold, italic, underline, link, unlink, list, indent) and a text area containing the text 'Please fill out this form completely.' An 'Add Part' button is visible at the bottom right of the editor.

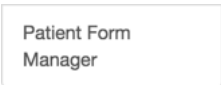
Using the Premium Patient Portal

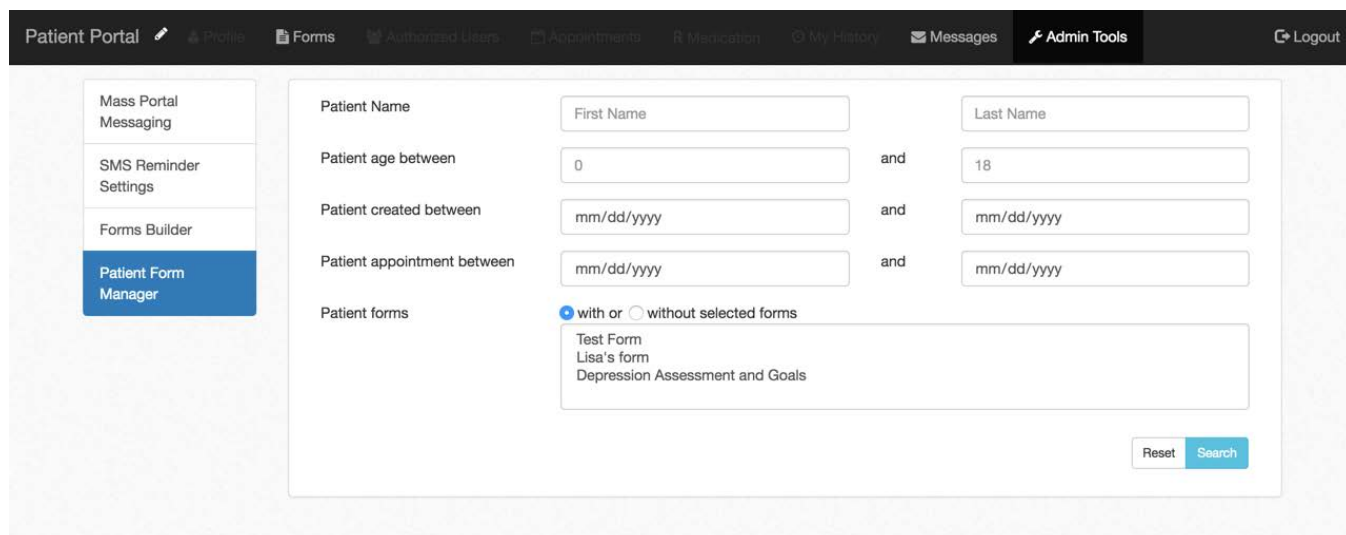
15. Once you have created your form, click the  button. You will see what the form will like for your patients.

16. When your form is ready, click the  button. Proceed to Patient Form Manager instructions.

Patient Form Manager

Now we will send it to your patient.


1. Click the  button.



The screenshot shows the Patient Form Manager interface. At the top, there is a navigation bar with the following items: Patient Portal, Profile, Forms, Authorized Users, Appointments, Medication, My History, Messages, Admin Tools, and Logout. On the left side, there is a sidebar menu with the following items: Mass Portal Messaging, SMS Reminder Settings, Forms Builder, and Patient Form Manager (which is highlighted in blue). The main content area contains the following fields and options:

- Patient Name: First Name and Last Name
- Patient age between: 0 and 18
- Patient created between: mm/dd/yyyy and mm/dd/yyyy
- Patient appointment between: mm/dd/yyyy and mm/dd/yyyy
- Patient forms: with or without selected forms

Below the Patient forms section, there is a list of forms: Test Form, Lisa's form, and Depression Assessment and Goals. At the bottom right of the form area, there are two buttons: Reset and Search.

2. Search for your patient using Patient Name, Patient age between, Patient created between, or Patient appointment between. Click the  button after criteria has been input.

Using the Premium Patient Portal

The screenshot shows the 'Admin Tools' section of the Patient Portal. On the left is a navigation menu with options: 'Mass Portal Messaging', 'SMS Reminder Settings', 'Forms Builder', and 'Patient Form Manager' (highlighted in blue). The main area contains search filters for patient forms:

- Patient Name: kenny and mccormick
- Patient age between: 0 and 18
- Patient created between: mm/dd/yyyy and mm/dd/yyyy
- Patient appointment between: mm/dd/yyyy and mm/dd/yyyy
- Patient forms: with or without selected forms

The 'Patient forms' list includes: Test Form, Lisa's form, and Depression Assessment and Goals. At the bottom right are 'Reset' and 'Search' buttons.

3. Patients that meet the criteria show. Click the **Select Forms** button by his/her name.

The screenshot shows a patient profile card for 'Kenny McCormick' with a green checkmark. Below the name are the details: 'DOB: 6/15/2007' and 'Age: 9'. A 'Back' button is in the top left, and a 'Select Forms' button is in the bottom right. A close 'X' button is in the top right.

4. Select the forms to send to the patient and then click the **Send Forms** button.

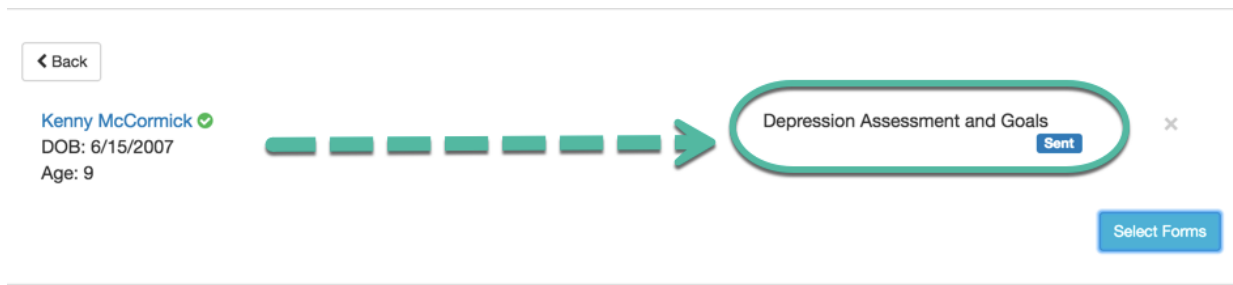
The screenshot shows a dialog box titled 'Select forms to send'. It contains three checkboxes:

- Test Form
- Lisa's form
- Depression Assessment and Goals

At the bottom are 'Cancel' and 'Send Forms' buttons.

5. You will see that the form(s) has been sent to the patient.

Using the Premium Patient Portal



Note: When a patient has completed the form, you will be able to see the status in this location.

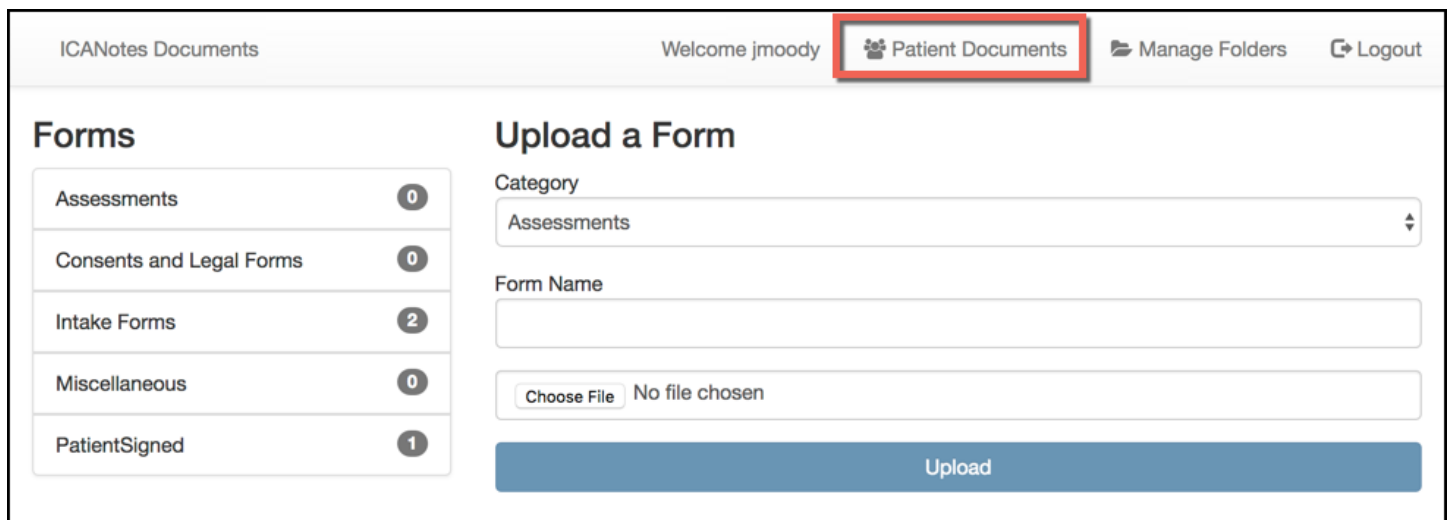


Fillable Form

If saved as a fillable PDF, patients can complete the forms electronically and upload them to their chart through the Patient Portal. A free application for creating fillable PDFs is available at <https://www.pdfescape.com/>.

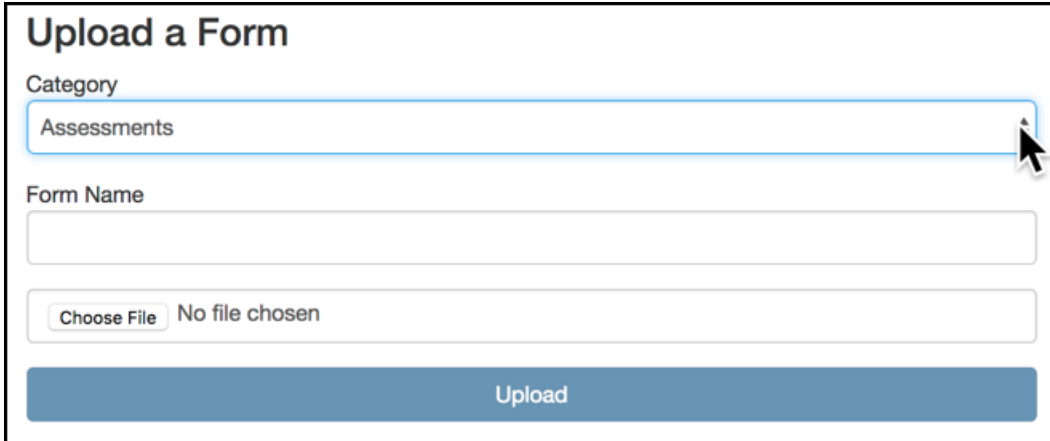
Fillable PDF forms that ICANotes created for use on the portal can be found at <http://www.icanotes.com/content/portal-forms>.

To upload a form to the patient portal, log into <https://upload.icanotes.com/login> and click on the  Patient Documents button.



Using the Premium Patient Portal

1. Assign a Category from the dropdown list for the form to be uploaded.



Upload a Form

Category
Assessments

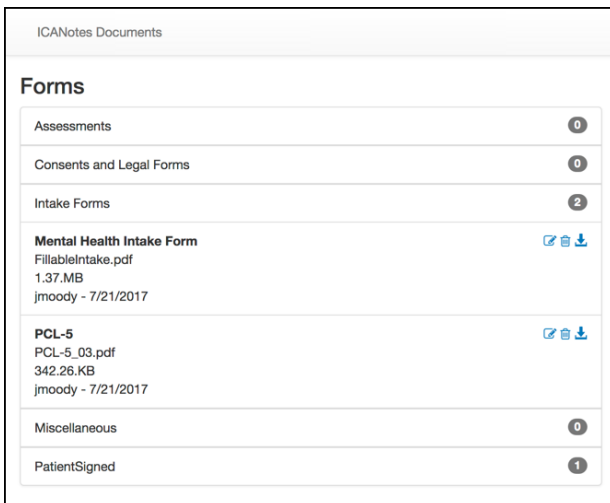
Form Name

Choose File No file chosen

Upload

2. Enter the form name which should display on the portal.
3. Click **Choose File** and choose the file to upload
4. Next, click **Upload** button.

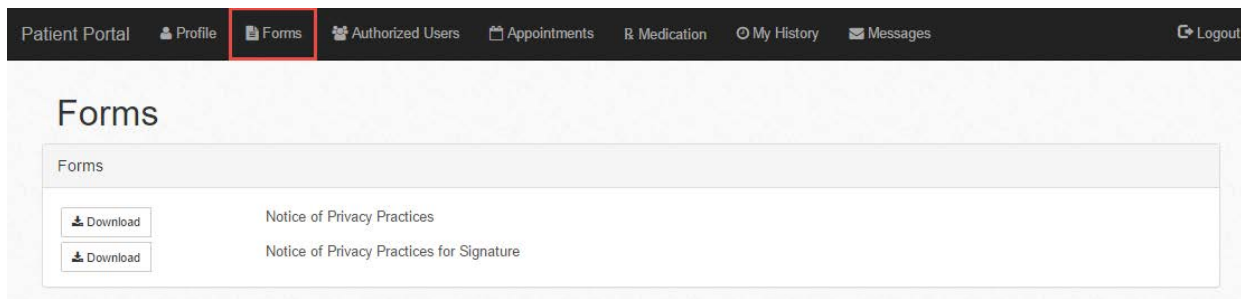
The name of the form you uploaded will appear under the category you selected.



ICANotes Documents	
Forms	
Assessments	0
Consents and Legal Forms	0
Intake Forms	2
Mental Health Intake Form	📄 📄 📄
FillableIntake.pdf	
1.37.MB	
jmoody - 7/21/2017	
PCL-5	📄 📄 📄
PCL-5_03.pdf	
342.26.KB	
jmoody - 7/21/2017	
Miscellaneous	0
PatientSigned	1

When patients log in to the Patient Portal, the forms uploaded by the practice will be available for download from the Forms tab.

Using the Premium Patient Portal



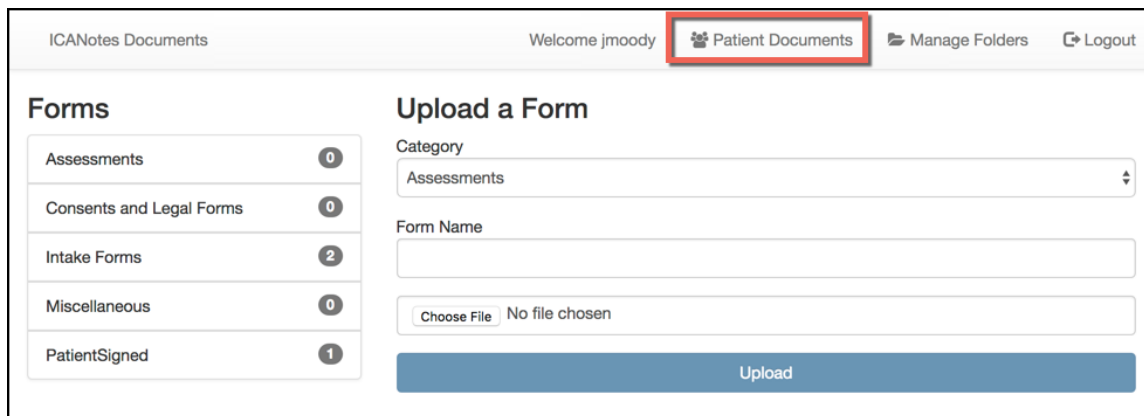
The patient can download the forms, save to their desktop, print or fill out form electronically, sign, and upload through the patient portal, after saving the electronically completed file or scanning the printed file.

After the patient uploads the form, it can be found on the upload site under the patient's name. See example below, "Patient Uploaded Intake Form" for patient Chip Smith.

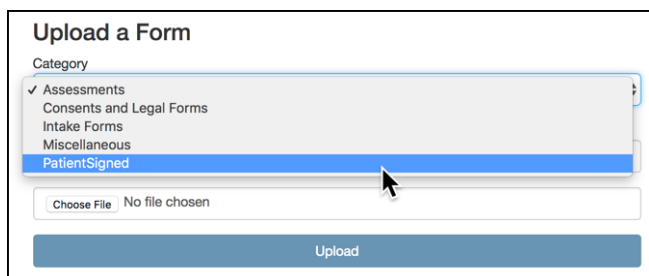
Adding Portal-Enabled Patient Signature Forms

These are instructions on how to upload forms for your patients to sign through the patient portal and how to find the forms in ICANotes once signed.

1. Click the Manage Forms button.



2. Select category of PatientSigned.



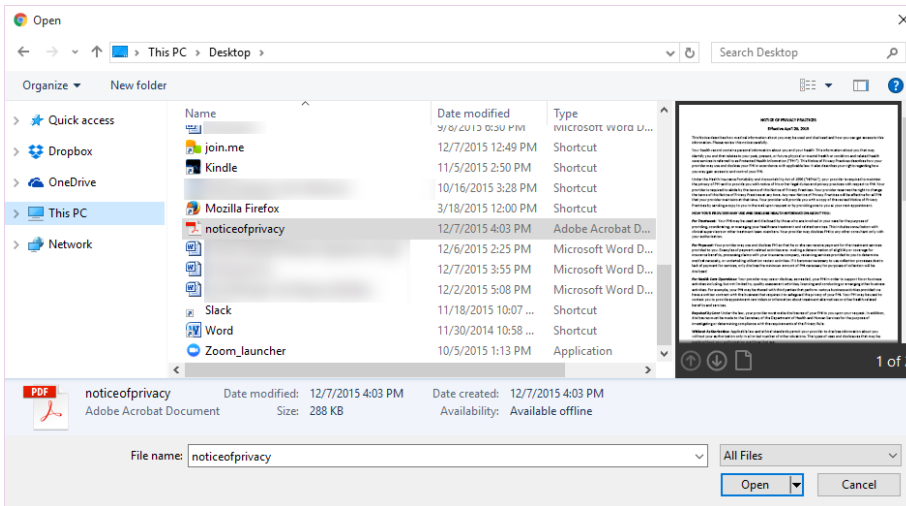
Using the Premium Patient Portal

3. Name the form under Form Name.

Category	PatientSigned
Form Name	NOTICE OF PRIVACY PRACTICES

4. Click **Choose File** under the Upload a Form box.

5. Find the form on your desktop and click **Open**.

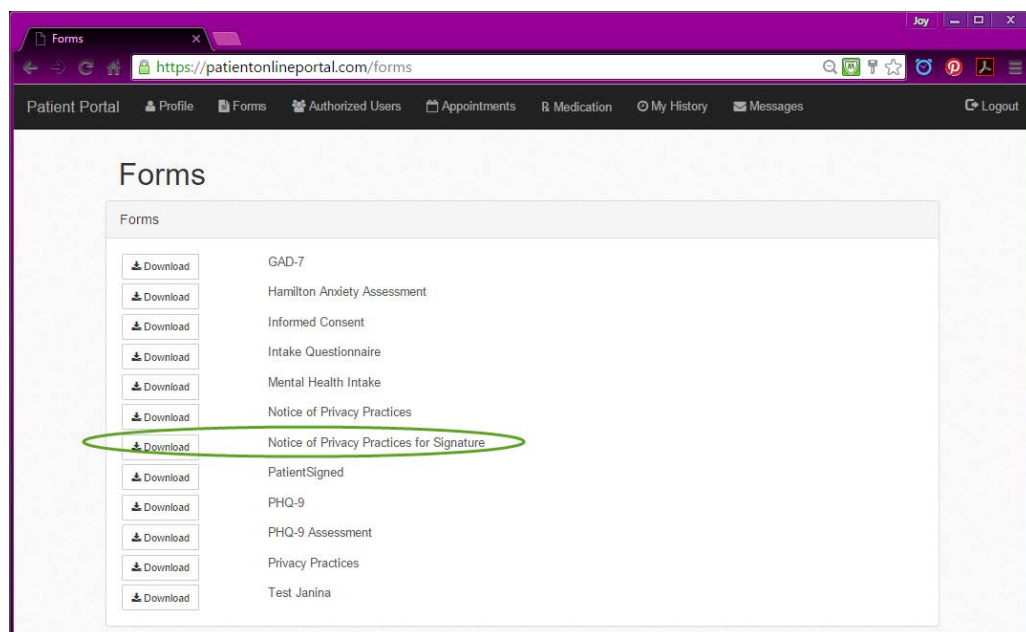


6. The form will now be under Patient signed under the Forms.

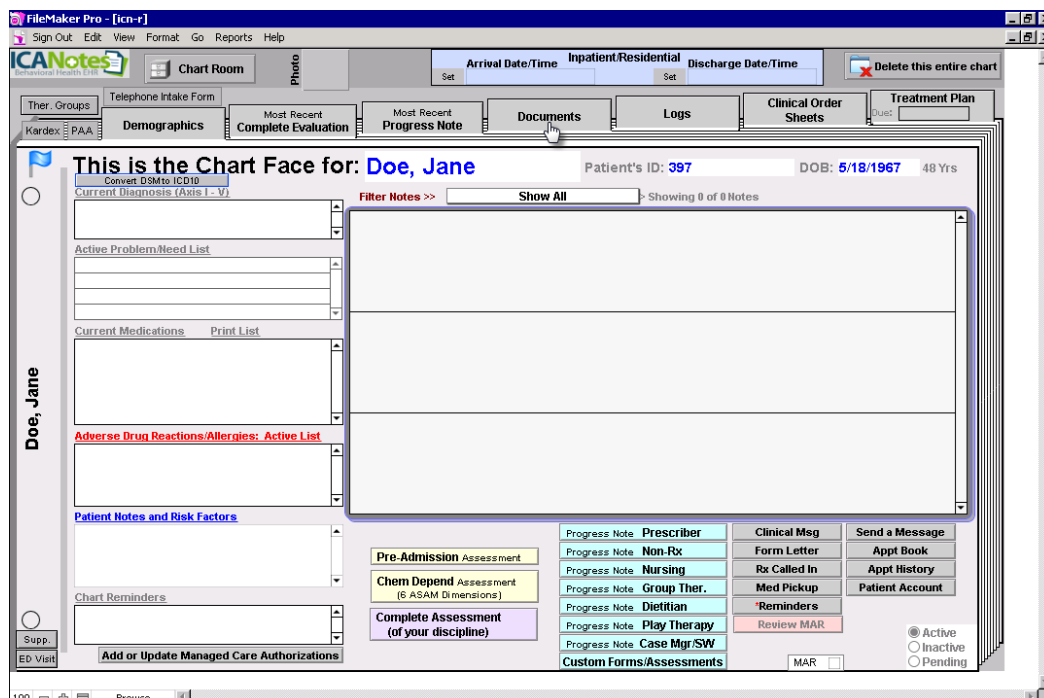
Forms	
Assessments	0
Consents and Legal Forms	0
Intake Forms	2
Miscellaneous	0
PatientSigned	1
Notice of Privacy Practices	
NOTICE OF PRIVACY PRACTICES.pdf	
288.25.KB	
jmoody - 7/21/2017	

Using the Premium Patient Portal

This form is now available on the patient portal for signature.

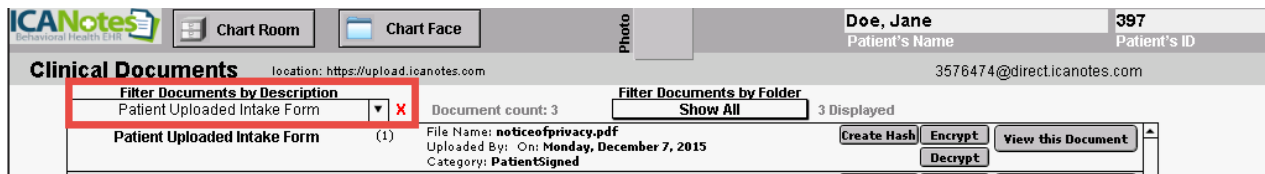


9. To find the signed document, go to the Document tab from the Chart face.



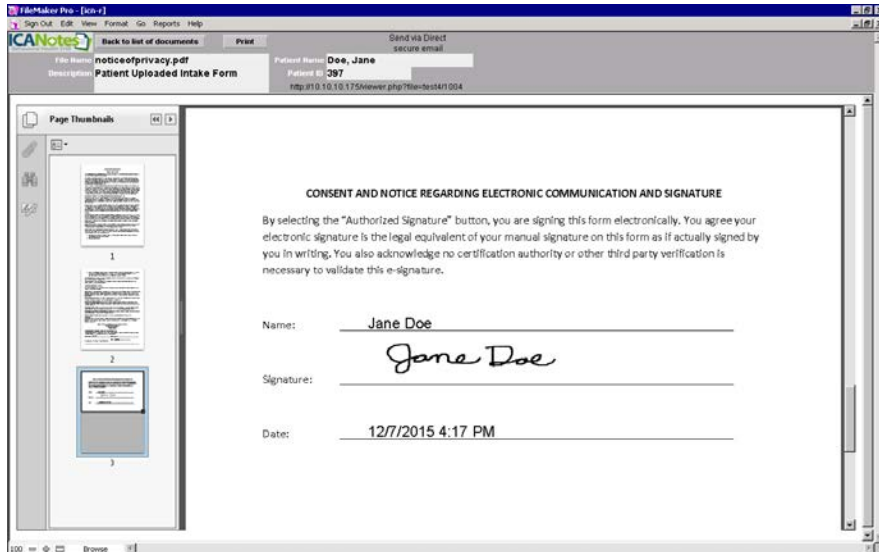
10. Under "Filter Documents by Description, Choose Patient Uploaded Intake Form.

Using the Premium Patient Portal



11. Click the **View this Document** by the patient form.


12. The last page will show the patient's signature.



13. The form can also be found on the Upload site by searching for the patient and looking under the PatientSigned documents.

Using the Premium Patient Portal

The screenshot shows the 'ICANotes Documents' interface. At the top, it says 'Welcome joytestfour' and 'Group Forms Logout'. Below the header, there's a search bar with 'doe' entered and a 'Search' button. To the right, there's an 'Upload a document' section with a 'Category' dropdown set to 'Assessment Tools', a checked 'Allow Group to View' option, and an 'Upload' button. The main area is titled 'Documents' and has a 'Sort files' dropdown set to 'Descending'. A list of document categories is shown, including 'Assessment Tools', 'Case Management', 'Consents and Legal Forms', 'Continuity of Care', 'Correspondence', 'Current Orders', 'Disability', 'Insurance Information', 'Lab', 'Miscellaneous', 'Patient Records', 'PatientSigned', 'Patient Uploaded Intake Form', 'Patient Uploaded Intake Form', and 'Photos'. The 'Patient Uploaded Intake Form' entries are highlighted with a red box. The first entry is 'noticeofprivacy.pdf portal - 12/7/2015' and the second is 'Informed Consent.pdf portal - 12/6/2015'. Both have icons for edit, delete, and download.

14. Click the  icon to see the document on another tab.

This is a close-up of the 'Patient Uploaded Intake Form' entry. It shows the document title 'Patient Uploaded Intake Form', the filename 'noticeofprivacy.pdf', and the date 'portal - 12/7/2015'. To the right of the text are three icons: a checkmark, a trash can, and a download arrow. A hand cursor is pointing at the download icon.

15. Scroll down to the bottom to see the patient's signature.

Using the Premium Patient Portal

CONSENT AND NOTICE REGARDING ELECTRONIC COMMUNICATION AND SIGNATURE

By selecting the "Authorized Signature" button, you are signing this form electronically. You agree your electronic signature is the legal equivalent of your manual signature on this form as if actually signed by you in writing. You also acknowledge no certification authority or other third party verification is necessary to validate this e-signature.

Name: Jane Doe

Signature: Jane Doe

Date: 12/7/2015 4:17 PM

SMS Reminder Settings

These instructions explain how to turn on the email and text reminders per patient.

- Text reminders have an additional cost.

Setting Up Reminders in Demographics

- Patient portal needs to be activated on the 'Patient Information' tab (see the blue square below).
- Cell phone number needs to be present for text reminders (see the red square below).
- Email address needs to be provided for email reminders (see green square below).
- Appointment Reminders need to be selected (see orange square below).




The screenshot shows the 'Patient Information' form for a patient named Alice Doe. The form includes fields for Name, Address, City, State, Zip, Home Phone, Cell Phone, Work Phone, Email, and Patient Status. The following fields are highlighted with colored boxes:


- Blue box:** Portal checkbox (checked).
- Red box:** Cell Phone field (555-555-5555).
- Green box:** Email field (joy+alicedoedemo@icanotes.com).
- Orange box:** Appt Reminders via: Email and Text Message checkboxes (both checked).

Using the Premium Patient Portal

The patient will receive the reminder 48 hours before the appointment (default setting). If a new appointment is created within the 48-hour timeframe, an appointment reminder will be sent to the patient shortly after the appointment is saved.

Email example:

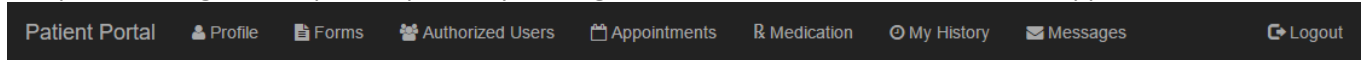
Exoticah has an appointment on 10/30/2015 at 9:00 AM  Inbox x  

 **noreply@patientonlineportal.com** 5:16 PM (3 minutes ago) ☆  



to me 

This is a reminder of your appointment on 10/30/2015 at 9:00 AM with Joy Test4. Please use our Patient Portal (<https://patientonlineportal.com/#/appointments>) to request a cancellation if you are unable to attend.

The patient can go to the patient portal by clicking on the link and confirm or cancel the appointment.



Upcoming Appointments			
Time	Location	Provider	Status
10/27/2015 11:15 am		Jay Monjon	Scheduled
10/28/2015 10:15 am		Jay Monjon	Scheduled
10/28/2015 12:30 pm	Humor Therapy	Joy Test4	Scheduled
10/30/2015 9:00 am	Humor Therapy	Joy Test4	Scheduled






If confirmed, the provider will receive a message through the Messaging Center.

Messaging Center


Internal Messages **Patient Portal**

Patient Portal For: **Joy Test4**

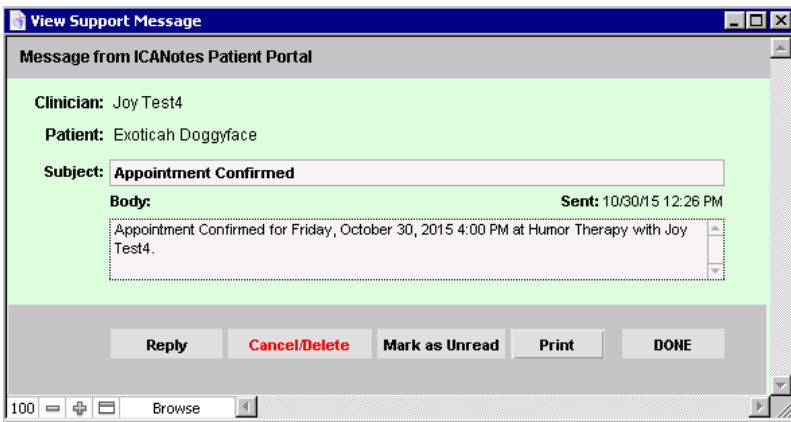
 Inbox  Sent  Deleted

Create a New Message
Select / Unselect Messages
Delete Selected Messages

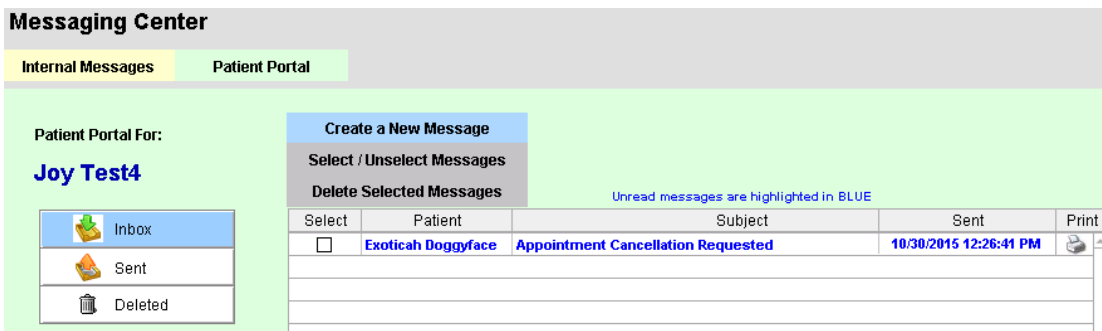
Unread messages are highlighted in BLUE

Select	Patient	Subject	Sent	Print
<input type="checkbox"/>	Exoticah Doggyface	Appointment Confirmed	10/30/2015 12:26:46 PM	

Using the Premium Patient Portal



If cancelled, the provider will receive a message through the Messaging Center.



Using the Premium Patient Portal

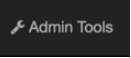
Example of text message:

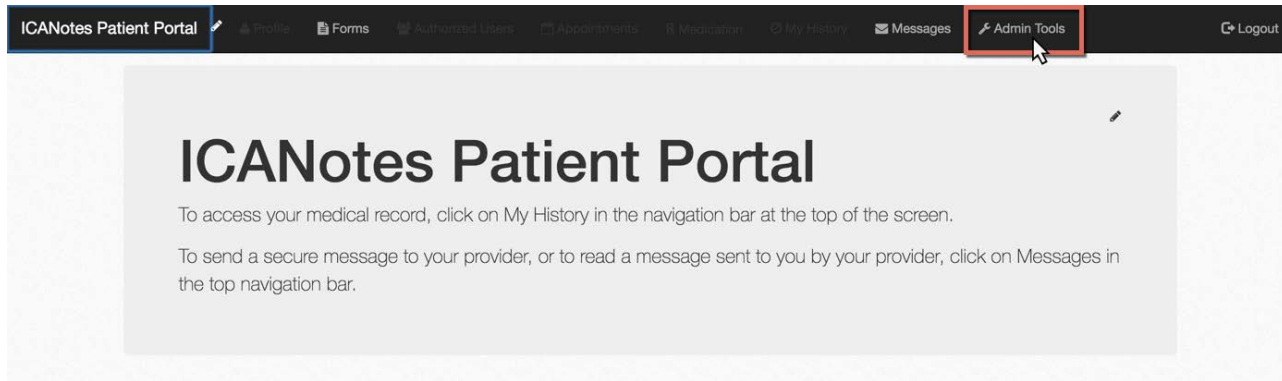
Exoticalah has an appointment with Joy Test4 at 12:30 PM on 10/28/2015. Text back YES to confirm or NO to request cancellation of your appointment.

If the patient texts back YES, the Patient Reminder Status Report will show as confirmed.

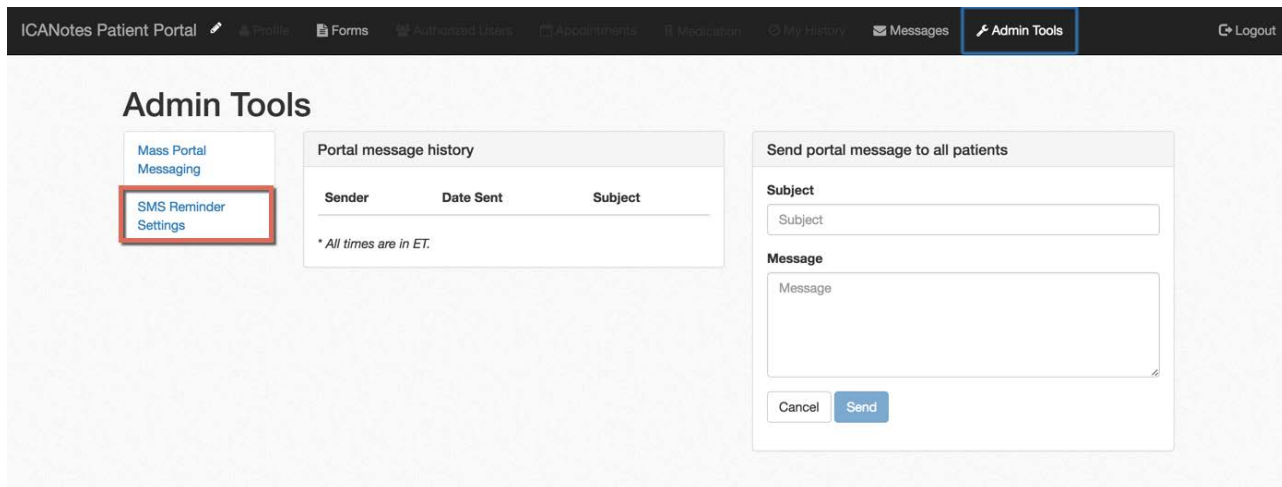
If the patient texts back NO, the patient Reminder Status Report will show as cancellation requested.

Custom Text Reminders

1. If you have text reminders activated, there will be a new selection available for Patient Portal Administrators under the  tab in the Patient Portal.



2. On Admin Tools, click the  button.



Using the Premium Patient Portal

3. This area is split into three areas. The Reminder Timing, second Reminder Timing, and Notification Timing. The Reminder Timing is default and will be sent out, but the other two can be turned on/off. Let's look at these individually.

The screenshot shows the 'Admin Tools' section of the ICA Notes Patient Portal. On the left, there is a sidebar with 'Mass Portal Messaging' and 'SMS Reminder Settings'. The main content area is divided into three sections for configuring reminders:

- Reminder Timing:** A section with a checkbox that is checked. It includes a text input for 'Send reminder out' set to '3' hours ahead of an appointment.
- Confirm/Cancel:** A section with a checkbox that is checked. It includes the text 'Give patients the option to confirm or cancel an appointment by text'.
- Reminder Text:** A section with a character count of approximately 85. It includes a text area with a placeholder: '{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.' Below the text area are buttons for 'Patient First Name', 'Provider Name', 'Location', 'Appointment Date', 'Appointment Time', and 'Day of the Week'. A 'Preview Reminder' button is at the bottom right.

The second section is identical in structure but has the 'Send a second reminder' checkbox unchecked and the timing set to '2' hours.

The third section is also identical in structure but has the 'Send a notification' checkbox checked and the timing set to '1' hour. The placeholder text for the notification is: 'Hey sleepy head! If you miss your {AppointmentDate} appointment with {ProviderName} at {Location} you'll be sorry. {PatientFirstName}, I'm talking to you.'

At the bottom right of the entire form, there is a 'Save Changes' button.

Using the Premium Patient Portal

4. The Reminder Timing is default and will be sent out within 48 hours of the appointment. You have three areas that you can control.

- when to send the reminder
- confirm/cancel by text
- reminder text

Reminder Timing

Send reminder out hours ahead of an appointment.


Confirm/Cancel

Give patients the option to confirm or cancel an appointment by text 📘

Reminder Text (approximately 85 characters left) 📘

Patient First Name Provider Name Location Appointment Date Appointment Time Day of the Week

{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.

4a. You can change the hours ahead to send the reminder by using the arrows  in the field.

4b. Change the option to confirm/cancel by text by clicking the slider located on the right side.

4c. Reminder Text can be created in the Reminder Text field. You can use the buttons Patient First Name Provider Name Location Appointment Date Appointment Time Day of the Week to pull in data from the ICANotes calendar.


The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

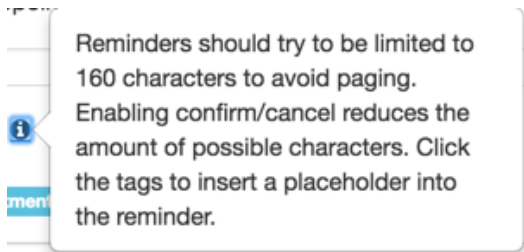
Reminder Text (approximately 85 characters left) 📘

Patient First Name Provider Name Location Appointment Date Appointment Time Day of the Week

{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.

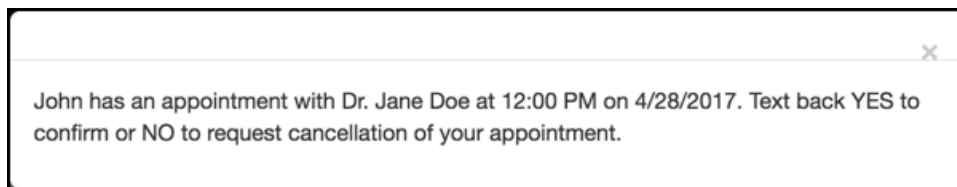
Using the Premium Patient Portal

4d. The  icon can be clicked for help.




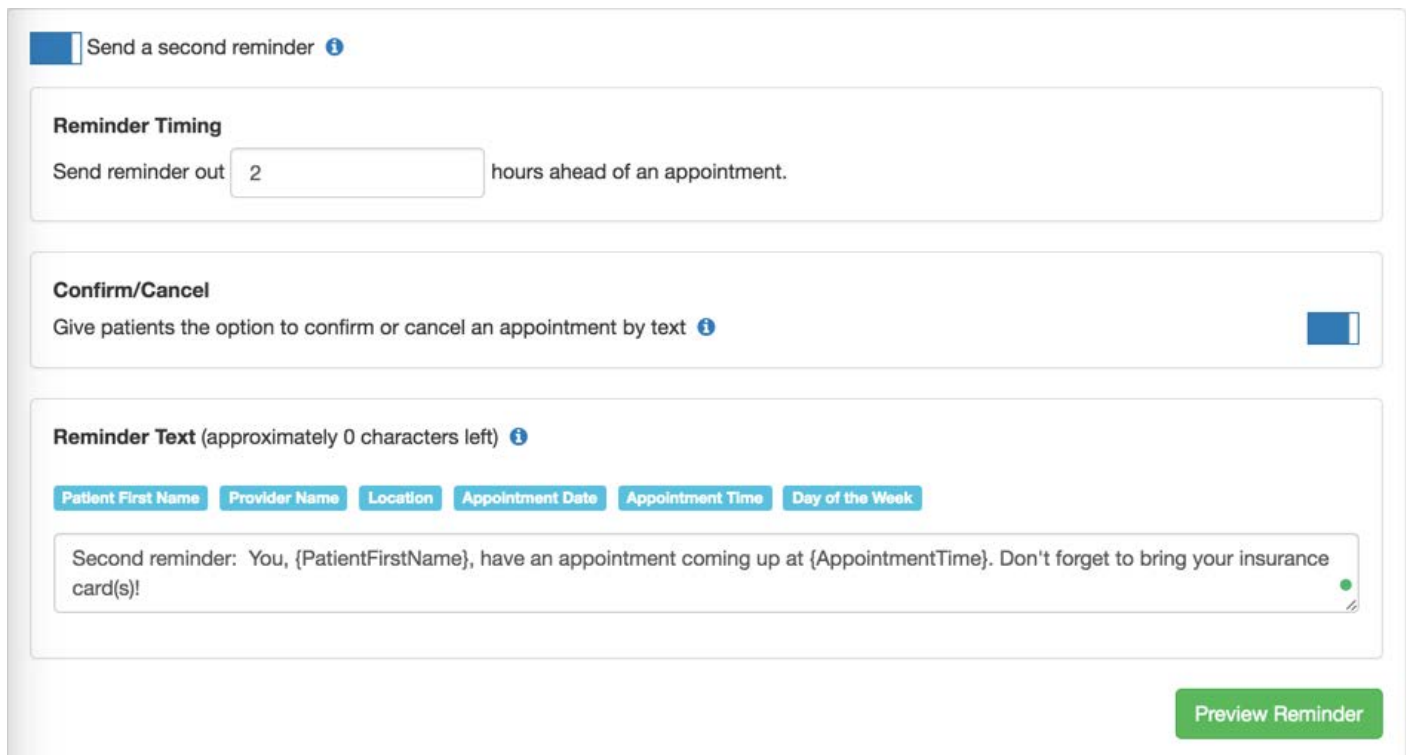
Reminders should try to be limited to 160 characters to avoid paging. Enabling confirm/cancel reduces the amount of possible characters. Click the tags to insert a placeholder into the reminder.


4e. Click the  button to see what the text will look like.




John has an appointment with Dr. Jane Doe at 12:00 PM on 4/28/2017. Text back YES to confirm or NO to request cancellation of your appointment.


5. A second reminder can be sent after the initial reminder to allow reminders to be sent further. This option can be turned on/off by using the slider  located in the top left.





Send a second reminder 

Reminder Timing
Send reminder out hours ahead of an appointment.

Confirm/Cancel
Give patients the option to confirm or cancel an appointment by text 

Reminder Text (approximately 0 characters left) 

Second reminder: You, {PatientFirstName}, have an appointment coming up at {AppointmentTime}. Don't forget to bring your insurance card(s)! 

5a. You can change the hours ahead to send the reminder by using the arrows  in the field.

Using the Premium Patient Portal

5b. Change the option to confirm/cancel by text by clicking the slider located on the right side.

5c. Reminder Text can be created in the Reminder Text field. You can use the buttons **Patient First Name** **Provider Name** **Location** **Appointment Date** **Appointment Time** **Day of the Week** to pull in data from the ICANotes calendar.

The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

Reminder Text (approximately 29 characters left) ⓘ

Patient First Name **Provider Name** **Location** **Appointment Date** **Appointment Time** **Day of the Week**

Second reminder: You, {PatientFirstName}, have an appointment coming up at {AppointmentTime}. Don't forget to bring your insurance card(s)! ✎

5d. Click the **Preview Reminder** button to see what the text will look like.

Second reminder: You, John, have an appointment coming up at 12:00 PM. Don't forget to bring your insurance card(s)! ✕

6. A notification timing can be sent after the initial reminder to to allow reminders to be sent further. This option can be turned on/off by using the slider located in the top left.

Using the Premium Patient Portal

Send a notification ⓘ

Notification Timing

Send notification out hours ahead of an appointment.

Notification Text (approximately 13 characters left) ⓘ

[Patient First Name](#) [Provider Name](#) [Location](#) [Appointment Date](#) [Appointment Time](#) [Day of the Week](#)

Hey sleepy head! If you miss your {AppointmentDate} appointment with {ProviderName} at {Location} you'll be sorry. {PatientFirstName}, I'm talking to you.

[Preview Notification](#)

6a. You can change the hours ahead to send the reminder by using the arrows ↕ in the field.

6b. Notification Text can be created in the Notification Text field. You can use the buttons [Patient First Name](#) [Provider Name](#) [Location](#) [Appointment Date](#) [Appointment Time](#) [Day of the Week](#) to pull in data from the ICANotes calendar.

The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

Notification Text (approximately 13 characters left) ⓘ


[Patient First Name](#) [Provider Name](#) [Location](#) [Appointment Date](#) [Appointment Time](#) [Day of the Week](#)

Hey sleepy head! If you miss your {AppointmentDate} appointment with {ProviderName} at {Location} you'll be sorry. {PatientFirstName}, I'm talking to you.

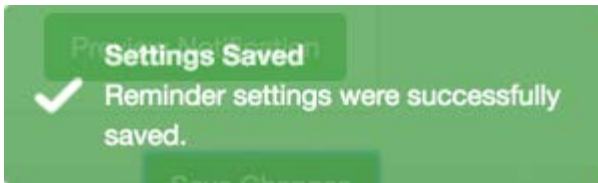
6c. Click the [Preview Reminder](#) button to see what the text will look like.

Hey sleepy head! If you miss your 4/28/2017 appointment with Dr. Jane Doe at Med Center you'll be sorry. John, I'm talking to you.

Using the Premium Patient Portal

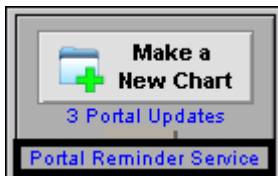
7. Once all of your texts are set, click the  button.


8. Look for the Settings Saved notification in the bottom right to verify all settings saved.

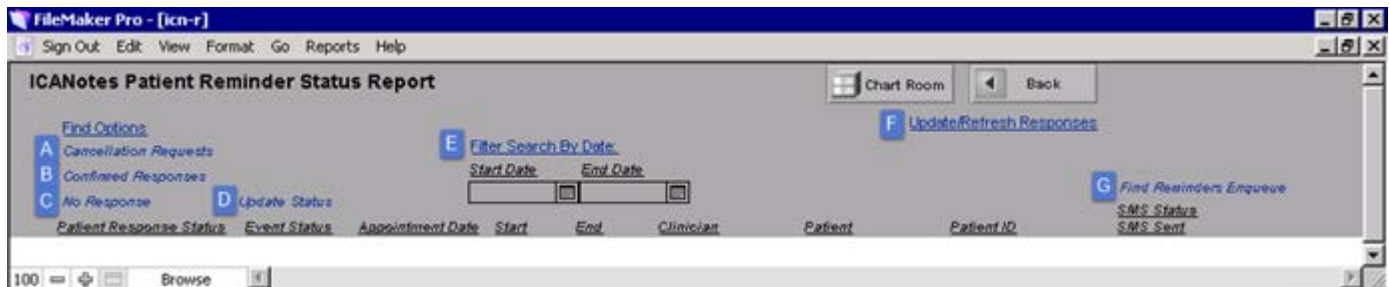


Using the Portal Reminder Status Report

These instructions explain how to use the Portal Reminder Status Report.



Click on the  button in the Chart Room to go to the Patient Reminder Status Report.



- A. Cancellation Requests** - Requests received from patients to cancel appointment.
- B. Confirmed Responses** - Response received from patients confirming appointment.
- C. No Response** - Appointments that the patients have not responded yet.
- D. Update Status** - A method to update status of records by bundle.
- E. Filter Start By Date** - Dates that can be filled in before performing a query for a specific time period.
- F. Update/Refresh Responses** – Updates the screen.
- G. Find Reminders Enqueue** - Performs find for all requests in queue. This exists for a special case where a patient may receive two reminders in a small time period. Thus a response in text will only result as a response for one reminder. The system is set up so that queued reminders can be tracked.

Using the Premium Patient Portal

ICANotes Patient Reminder Status Report

Chart Room | Back

Find Options: Cancellation Requests, Confirmed Responses, Update Responses

Filter Search By Date: Start Date, End Date

Update/Refresh Responses

A	B	C	D	E	F	G	H	I	J
Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status	SMS Sent
	Confirmed	12/2/15 Wednesday	Follow Up 2:00 PM	2:45 PM	Tami	Alanna Dedo	test1234	Sent	12-1-2015 5:20:54
	Cancelled	12/2/15 Wednesday	Therapy 30 min 2:00 PM	2:30 PM	Joy	Joy Test	1000010657022	Sent	12-1-2015 5:19:54
	Confirmed	12/3/15 Thursday	Therapy 30 min 2:00 PM	2:30 PM	Joy	Eric Cartman Nevada Nuclear Test Site	350	Sent	12-2-2015
	Scheduled	12/3/15 Thursday	Therapy 30 min 2:30 PM	3:00 PM	Joy	Stan Marsh	348	Sent	12-2-2015

- A. A green check will show when the patient response status and event status fields match.
- B. **Patient Response Status** – This shows the patient's response.
- C. **Event Status** – This is the status shown on the ICANotes appointment book/calendar.
- D. **Appointment Date** – The date of the patient's appointment.
- E. **Start** – The appointment start time.
- F. **End** – The appointment end time.
- G. **Clinician** – The clinician assigned to appointment.
- H. **Patient** - The patient's name.
- I. **Patient ID** - The patient's ID number.
- H. **SMS Status / SMS Sent** – Text message status and the date that the text message was sent.

How to Update the Patient Reminder Status Report:

1. After the patient responds via email or text, the Patient Response Status will update on the report.

Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status	SMS Sent
	Scheduled	12/2/15 Wednesday	Follow Up 2:00 PM	2:45 PM	Tami	Alanna Dedo	test1234	Sent	12-1-2015 5:20:54


2. Click the button to open the dropdown menu choices to update the event status.

Event Status

- Block Out
- Cancelled
- Rescheduled
- Available
- No Show
- Attended
- Scheduled
- Confirmed**

Using the Premium Patient Portal

3. When the event status is changed to match the patient response status, a green check mark will populate in the left column.

<i>Patient Response Status</i>	<i>Event Status</i>	<i>Appointment Date</i>	<i>Start</i>	<i>End</i>	<i>Clinician</i>	<i>Patient</i>	<i>Patient ID</i>	<i>SMS Status</i> <i>SMS Sent</i>
 Patient Confirmed	Confirmed	12/2/15 Wednesday	Follow Up 2:00 PM	2:45 PM	Tami	Alanna Dedo	test1234	Sent 12-1-2015 5:20:54

Note: When the Event Status is changed in the Portal Reminder Status Report, the status also changes in all areas of ICANotes (Clinician Reminder Sheet, Event Details, and Calendar Quick View).