Using the Premium Patient Portal

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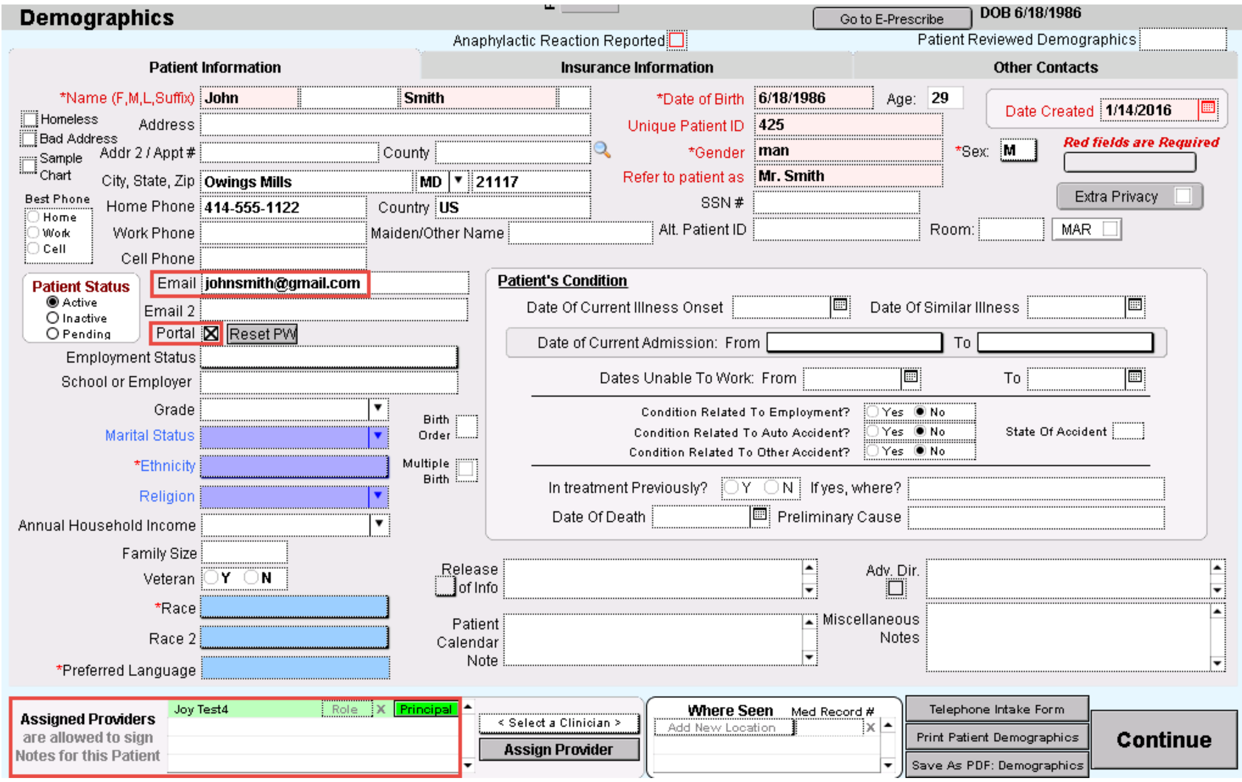
Premium patient portal functionality must be activated by Sales as it is an additional cost. Call Sales at 866-847-3590. The premium patient portal allows the patient to enter their own demographic information into ICANotes. Practices can post or create fillable forms for patients to complete and sign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

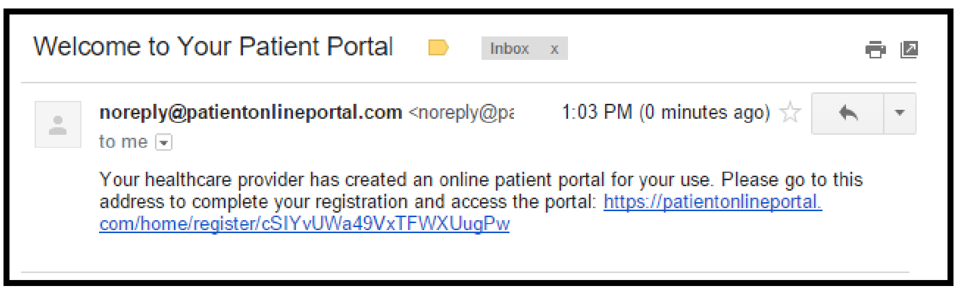
Activating Patient Portal

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.



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.

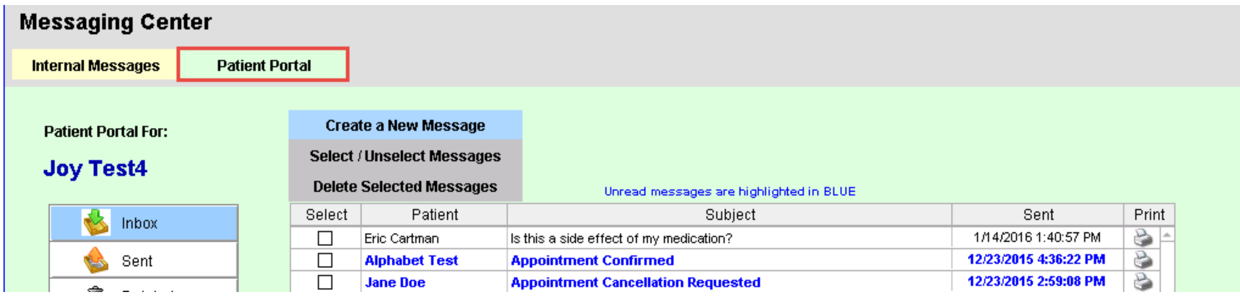
Using the Premium Patient Portal

Patient Portal

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

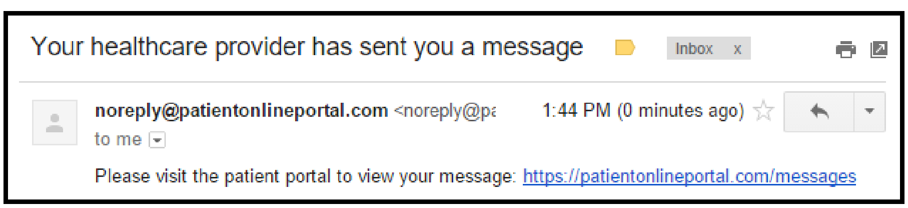
Regularly check the 

section of the Messaging Center for secure messages from your patients.



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 

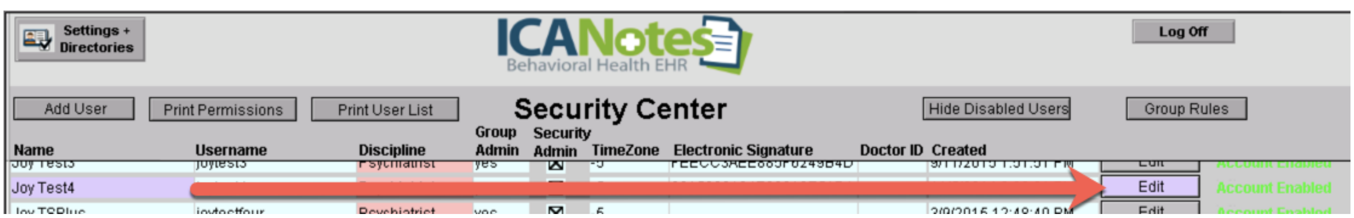
drawer from the Chart Room.

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

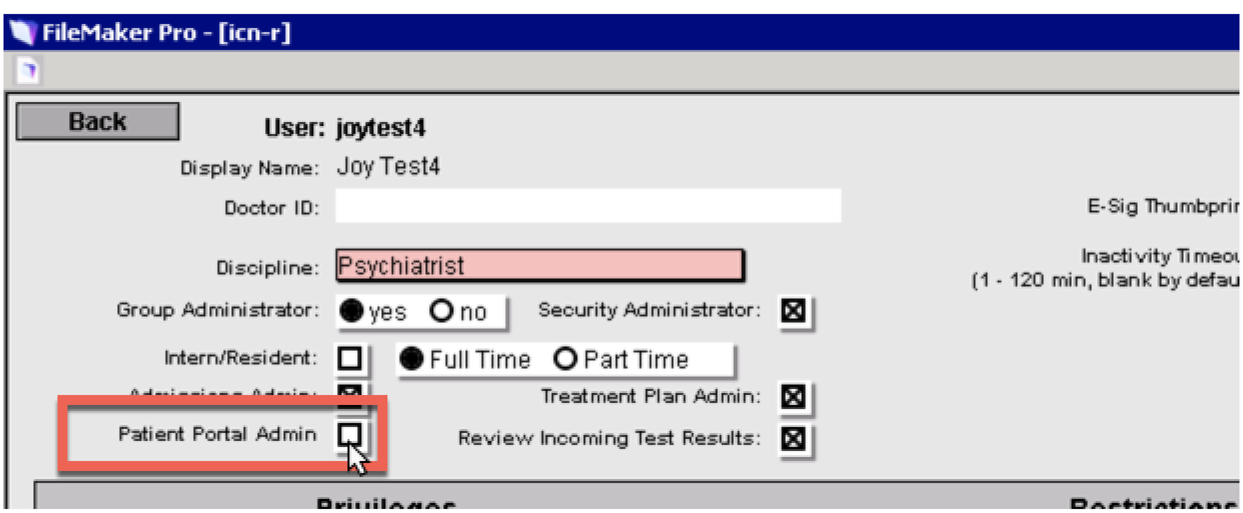
3. Enter your password.

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.)

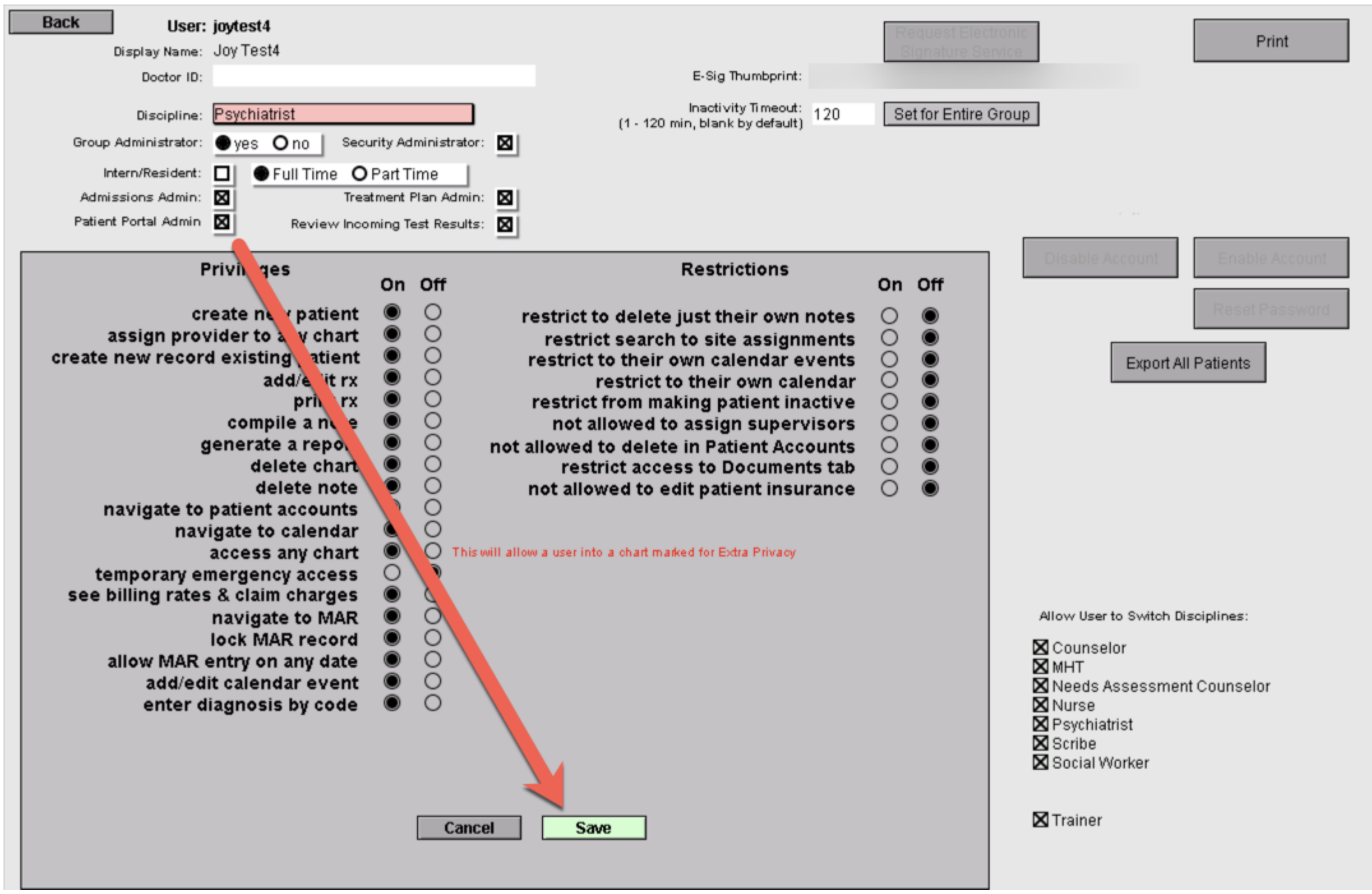


6. In the top left corner, click the 'Patient Portal Admin checkbox to turn on the feature.



7. Click the 

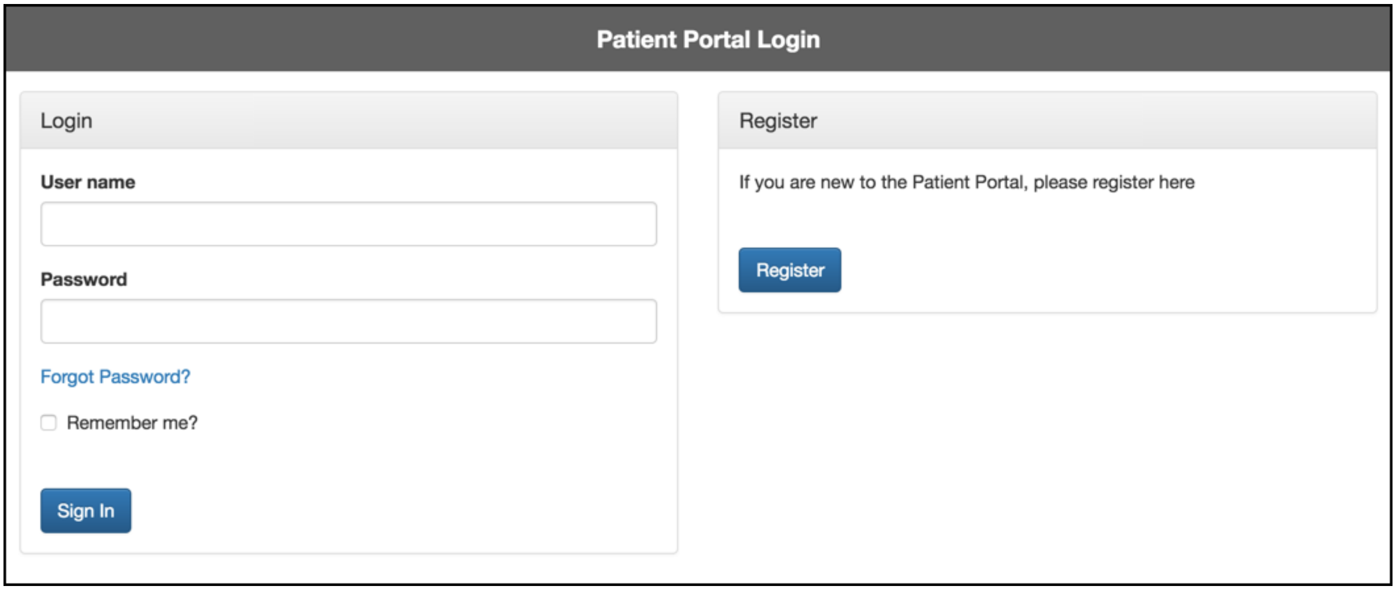
button to save the change.



This user is now ready for Patient Portal Admin functionality.

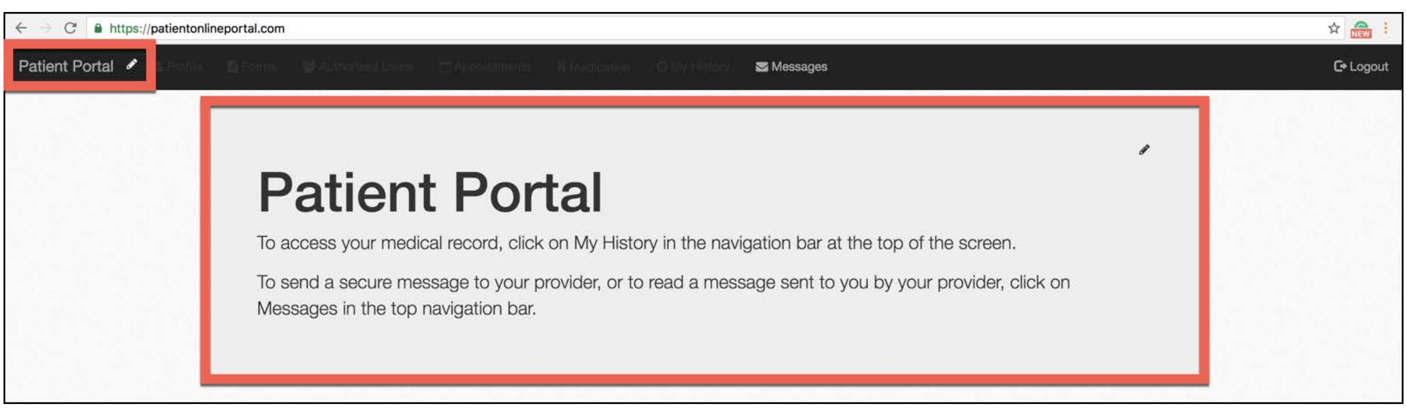
How to Make Changes to the Portal Landing Page

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



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

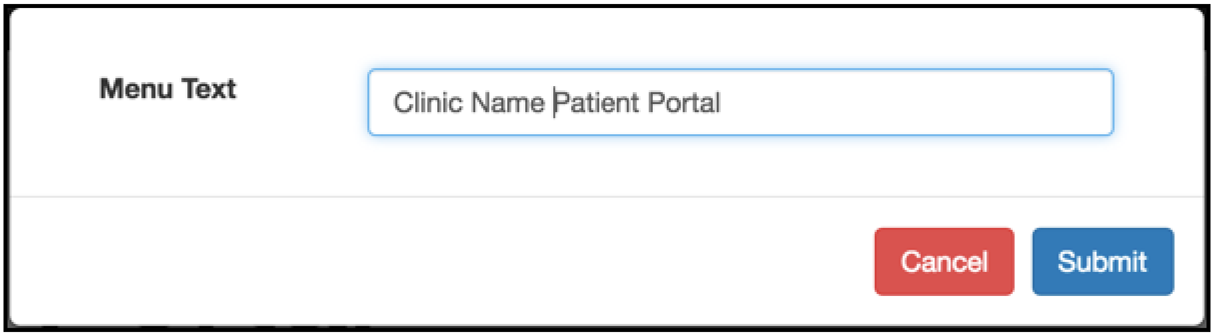
3. On the main page, you can change the name of the Patient Portal and the welcome message.



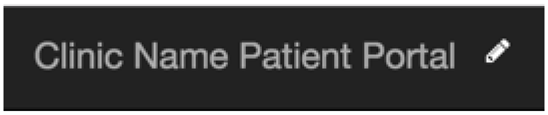
4. Click the pencil icon  in the top left to change the name of the Patient Portal.

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.



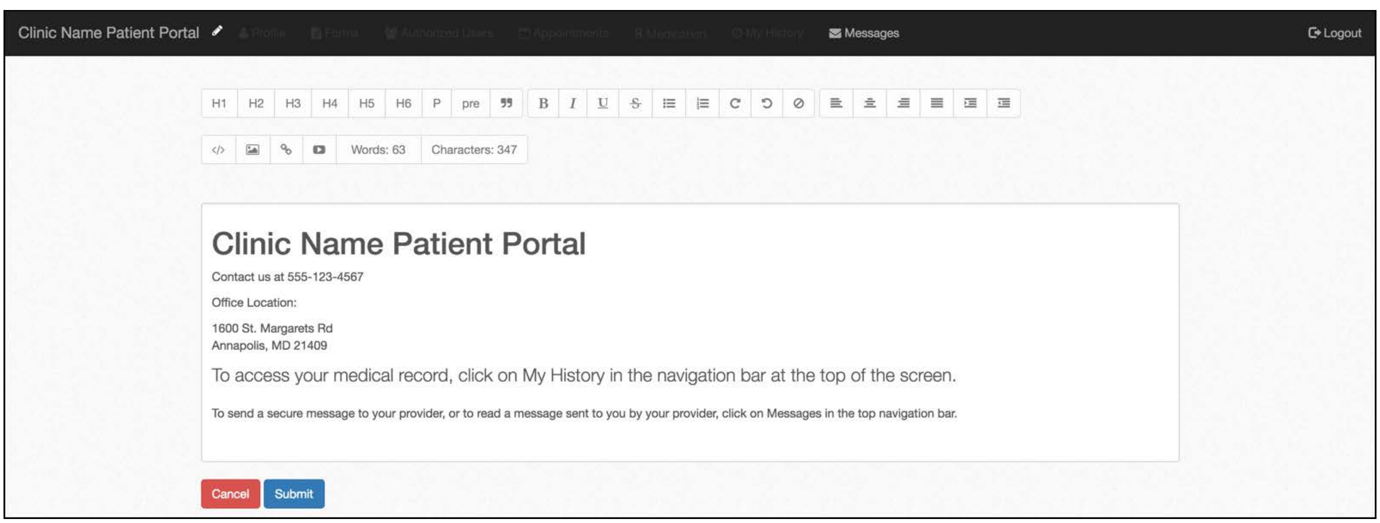
6. The name at the top will be changed.



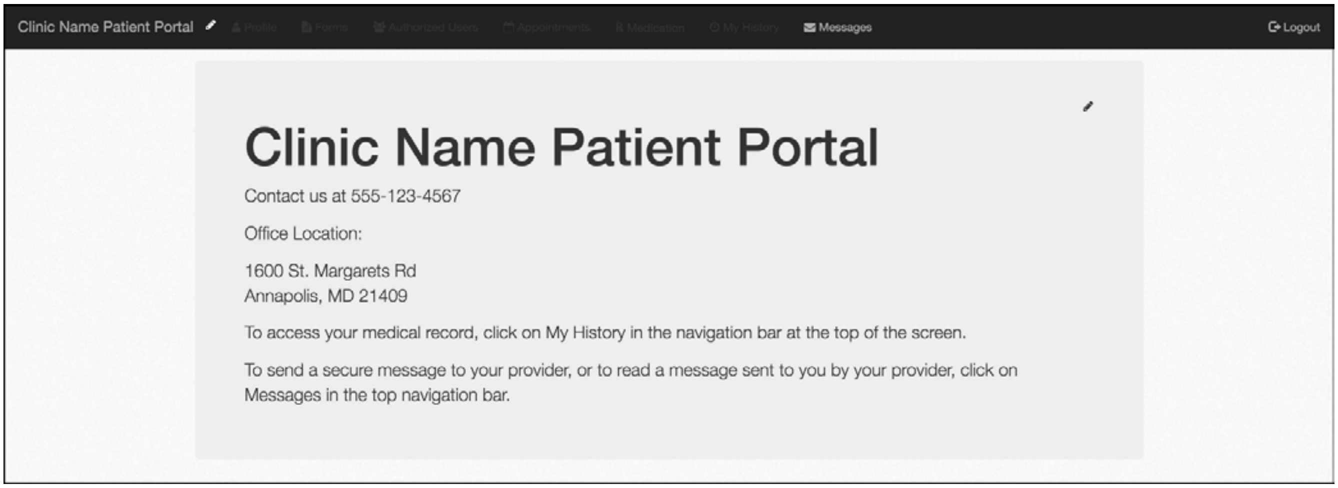
7. Click the pencil icon  in the middle of the webpage to change the welcome message.

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

button to save the changes.



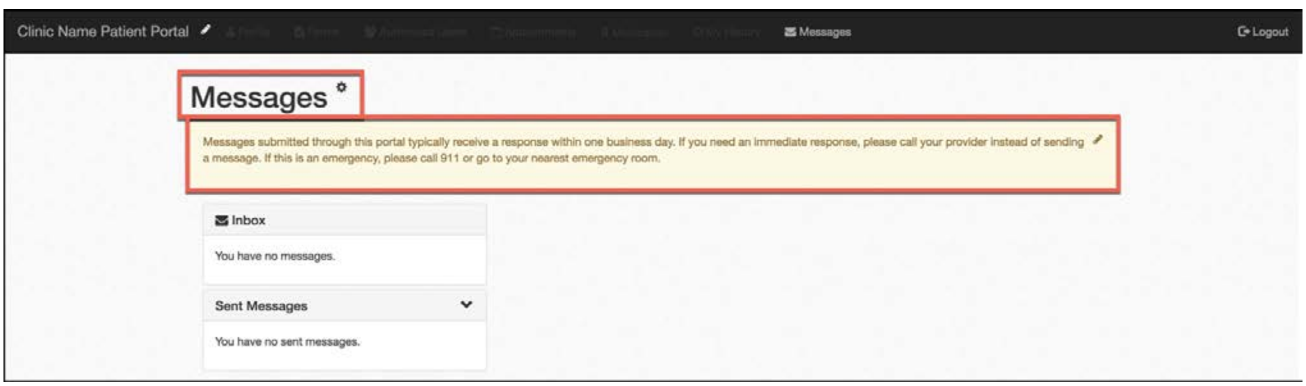
9. The Portal Landing Page message will now be changed.



How to Turn On/Off Messages and Disclaimer

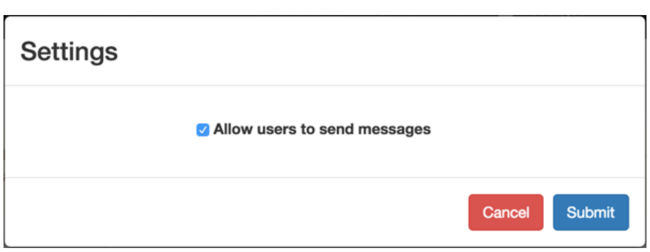
1. Click the Messages button at the top to go to the next area that can be modified.

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.

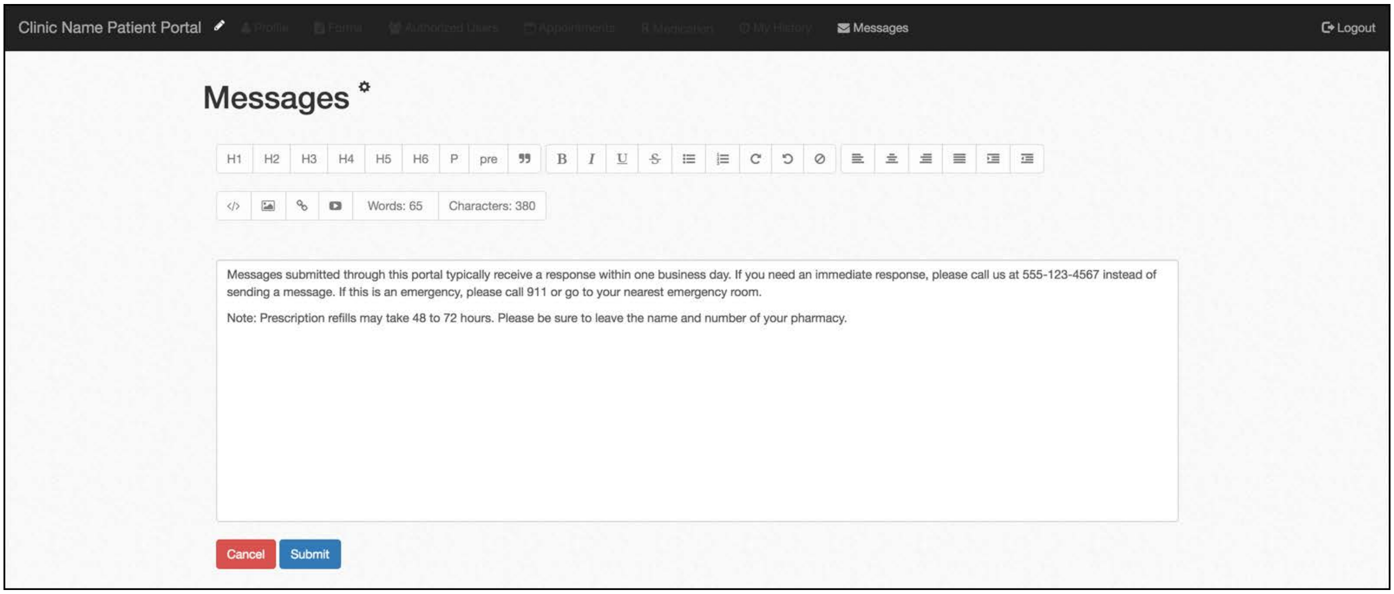
4. Default setting is for messages to be on. To turn it off, uncheck the 'All users to send messages' field. Click the Submit button.



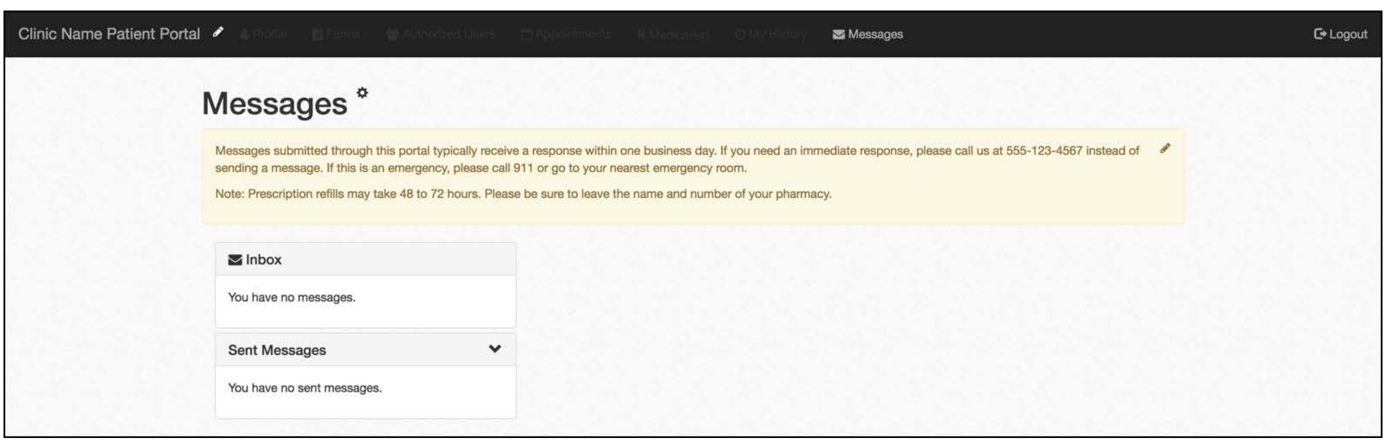
5. To change the disclaimer message that appears in the yellow area, click the  icon.

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

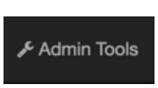
button to save the changes.



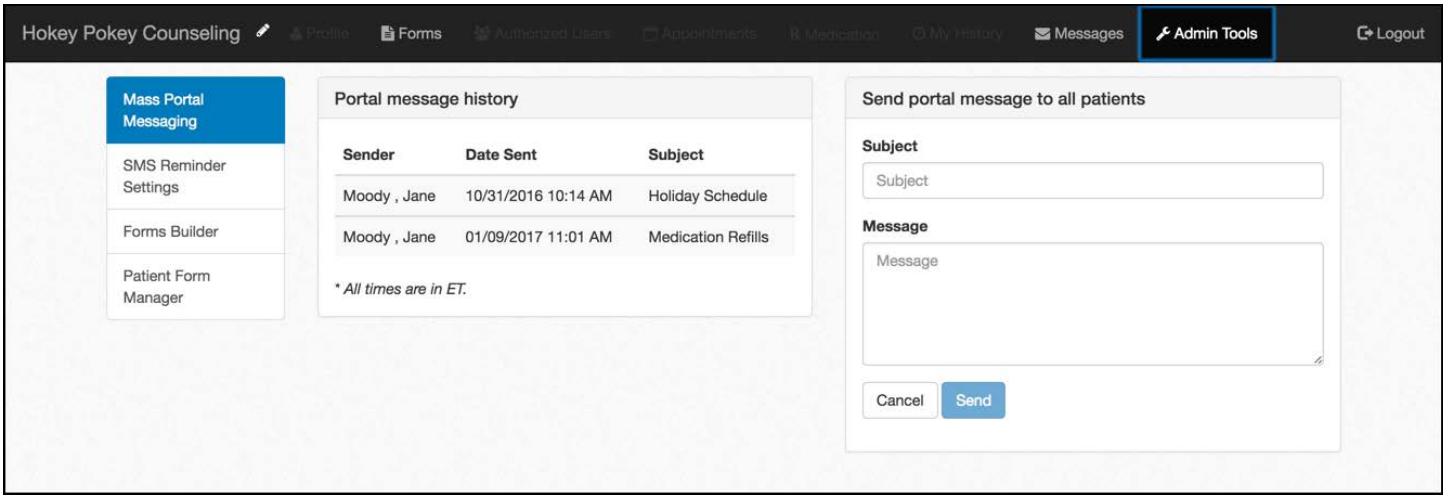
7. The disclaimer message will now be changed.



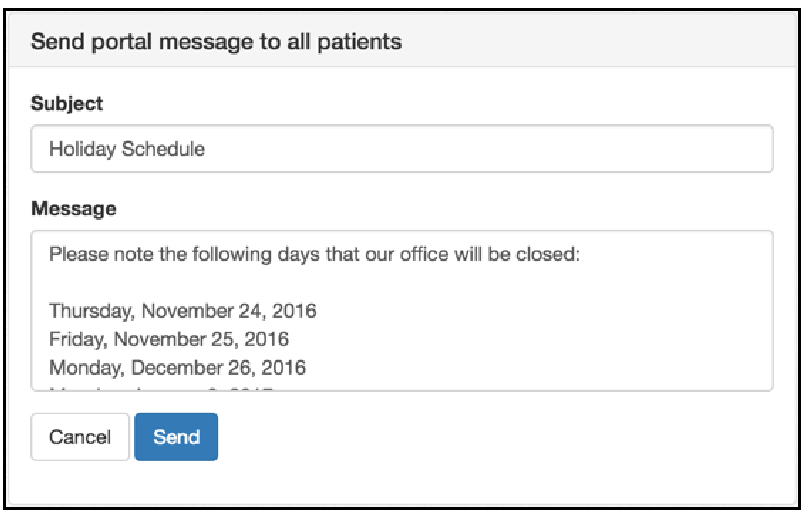
Mass Portal Messaging

1. Click the 

buttons on the top.



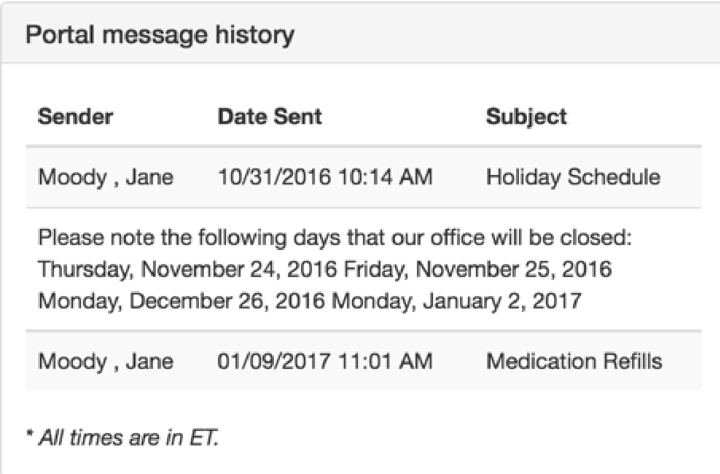
2. Type in a Subject and Message.



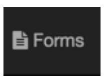
3. Click the 

button to send the message.

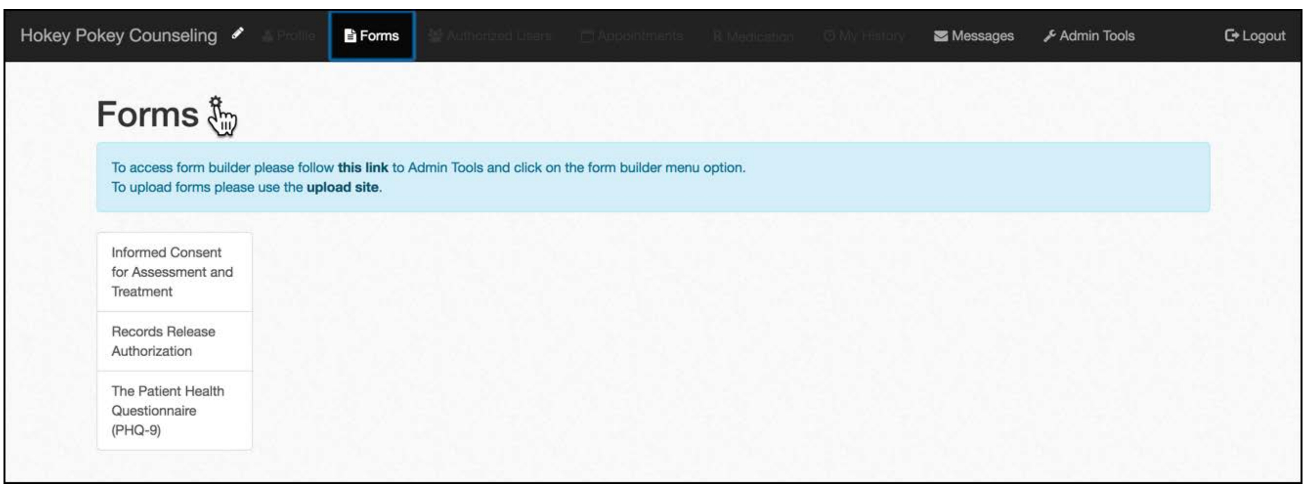
4. Your message will be sent to all patients and show the date sent under Portal message history.



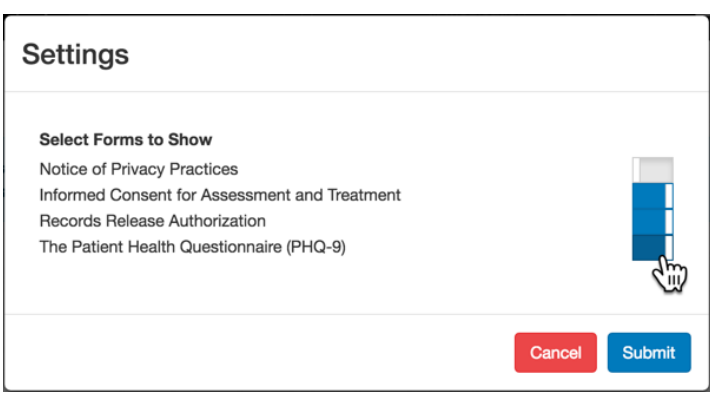
How to Change Form Visibility

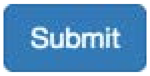
1. Click the  button on the top.

2. Click the ⚙ icon.



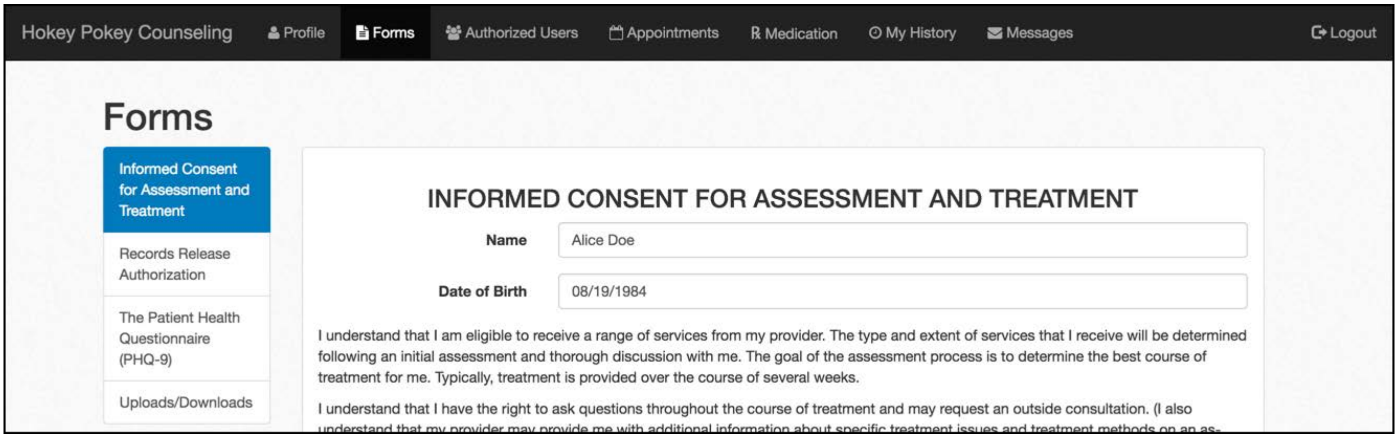
3. Select the forms that you would like to show.



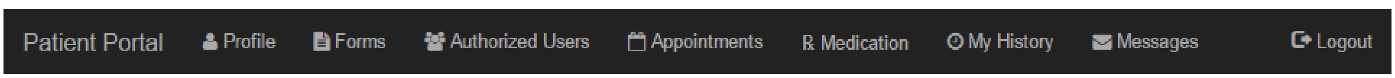
4. Click the 

button to save settings.

5. The selected forms will now show under Forms.



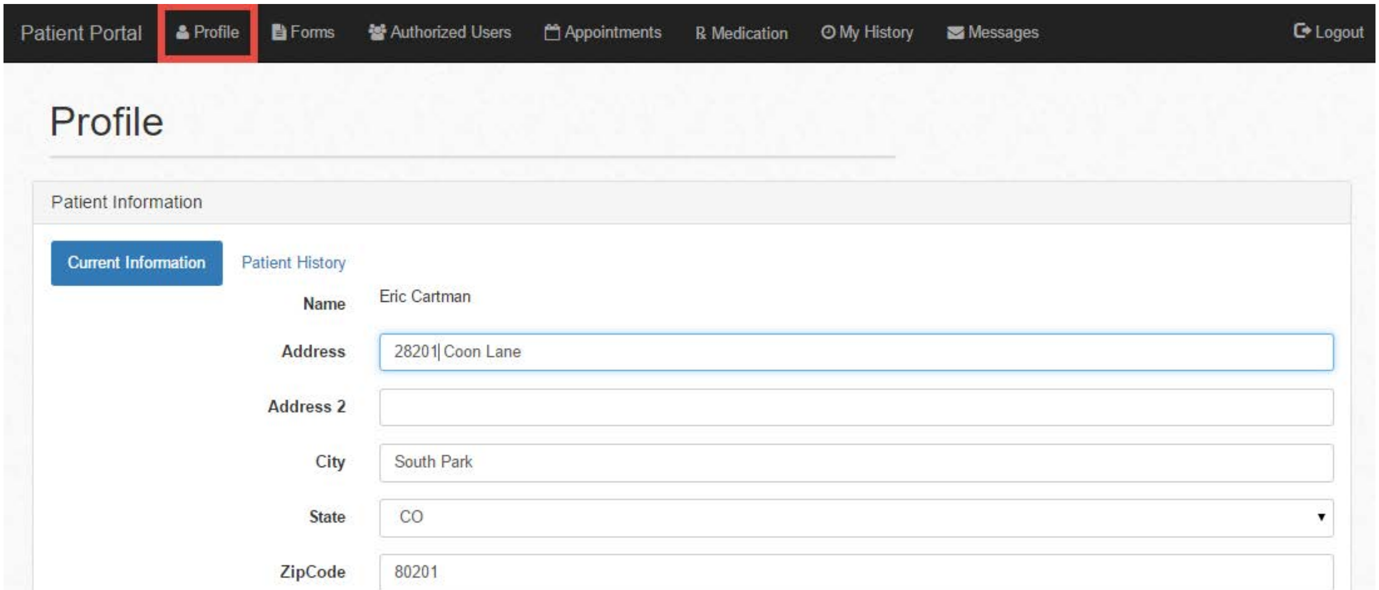
Premium Patient Portal Features



Demographics Entry

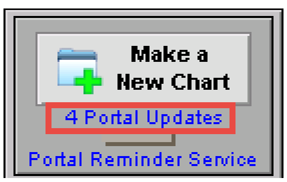
After registering on the Patient Portal, a patient can fill out their demographic information in the Profile section. When saved, the demographics are sent to ICANotes for your review. You can review and choose (via checkboxes) which fields to post to the demographics section of the patient chart. Your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

Using the Premium Patient Portal

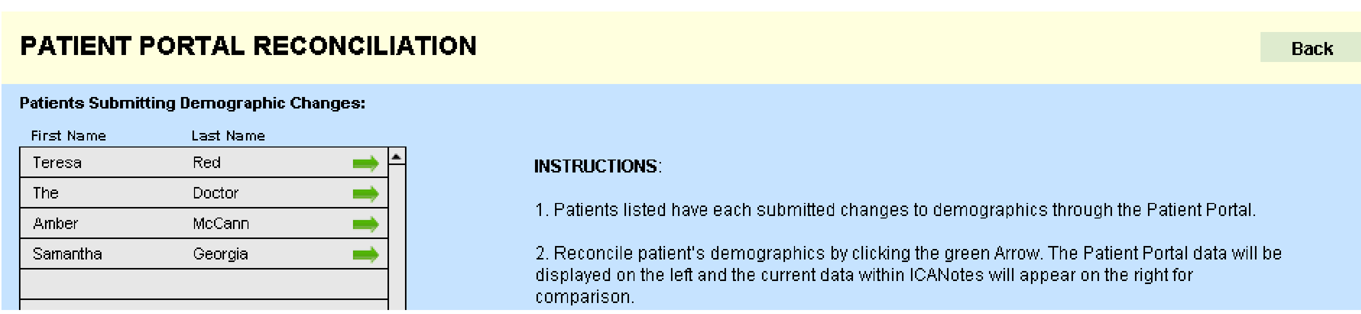


Note: Insurance information cannot be entered via the portal at this time. This will be in a future release.

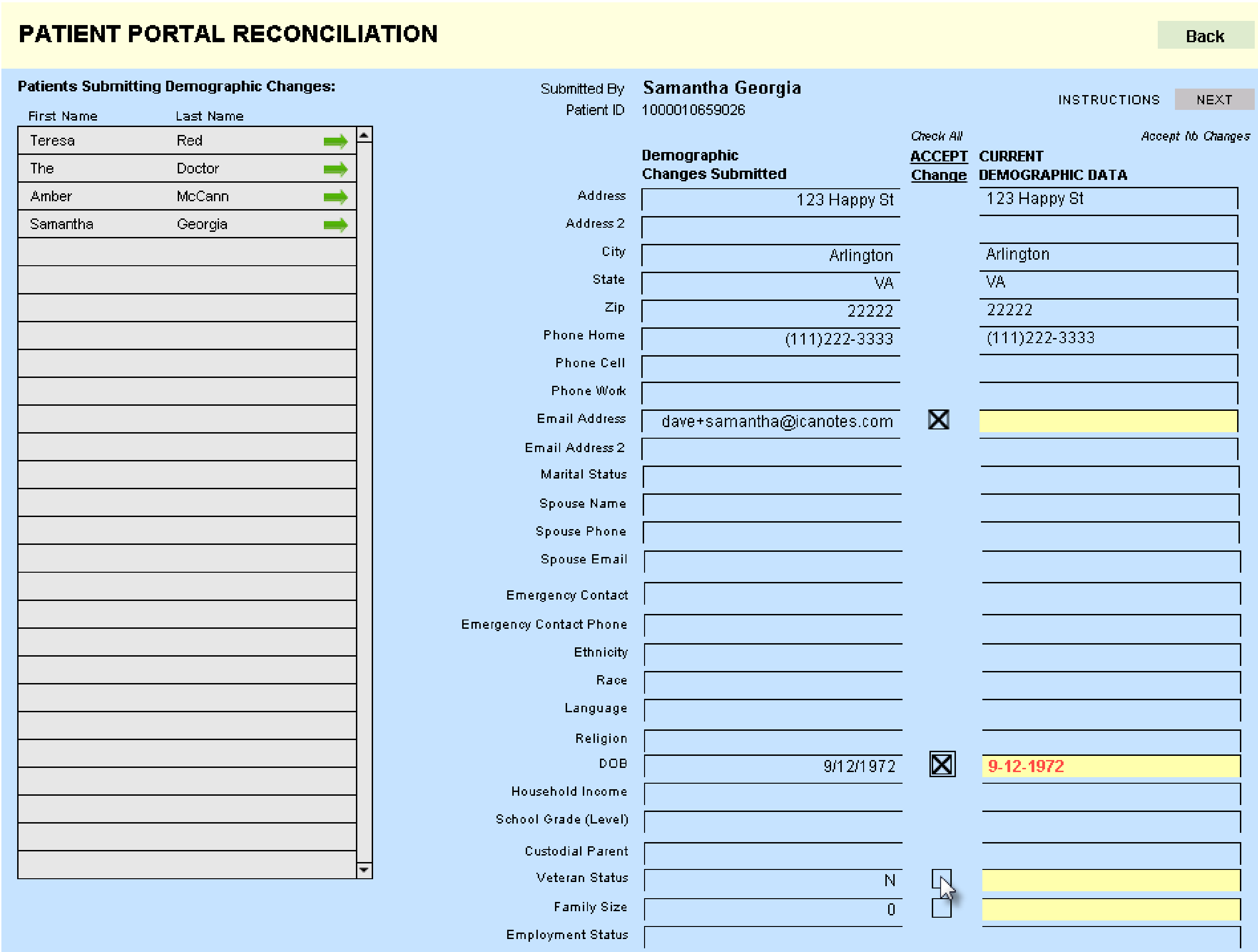
When a patient makes changes to his/her profile, an alert appears in the Chart Room indicating that a portal update has been made and requires review.



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

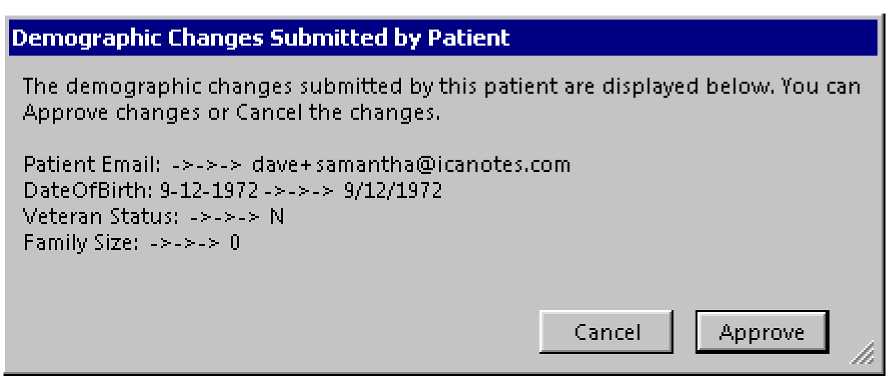


Selecting a patient from the left-hand column and clicking the green arrow to the right of his/her name will display a list of changes entered by the patient on his/her profile.



Using the checkboxes between the columns, the reviewer can select which changes should be posted to ICANotes. If the reviewer does not wish to post any of the patient's updates, Accept No Changes can be clicked. There are four screens of demographic data to review. Clicking the NEXT button will progress through the screens, and on the fourth screen, there is a FINISH button. Click Check All if the reviewer wishes to accept all changes made by the patient.

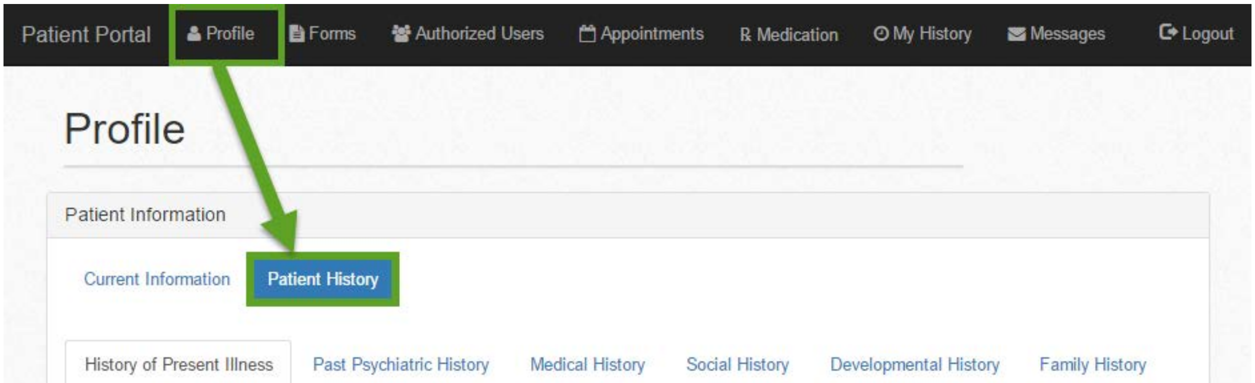
Clicking FINISH displays a pop-up approval window listing the changes which will be made. Click the Approve button to update the demographic data in ICANotes.



Using the Premium Patient Portal

Portal Intake

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

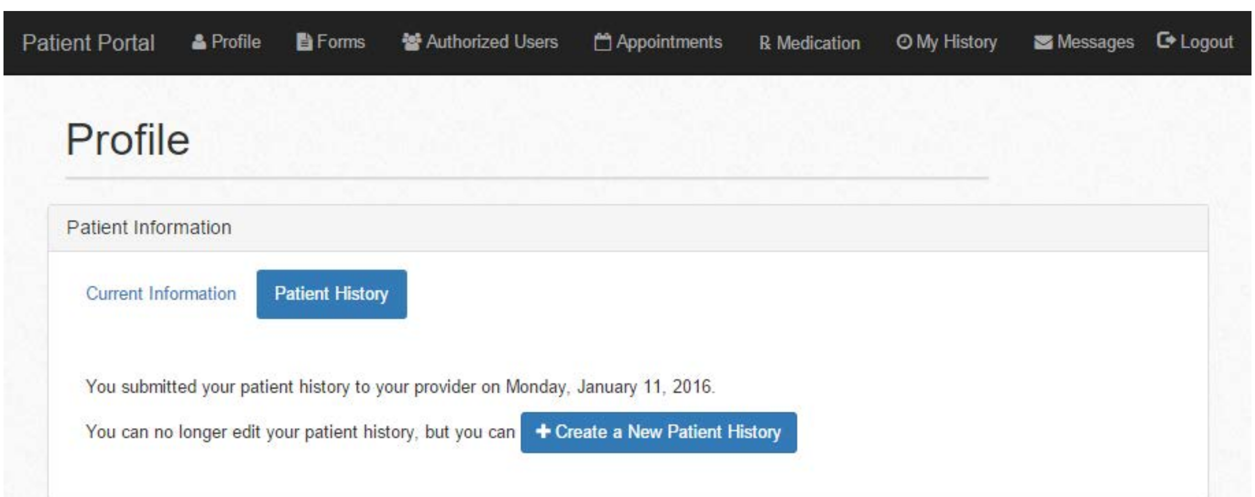


2. The patient should start on the History of Present Illness tab by filling in all applicable areas.

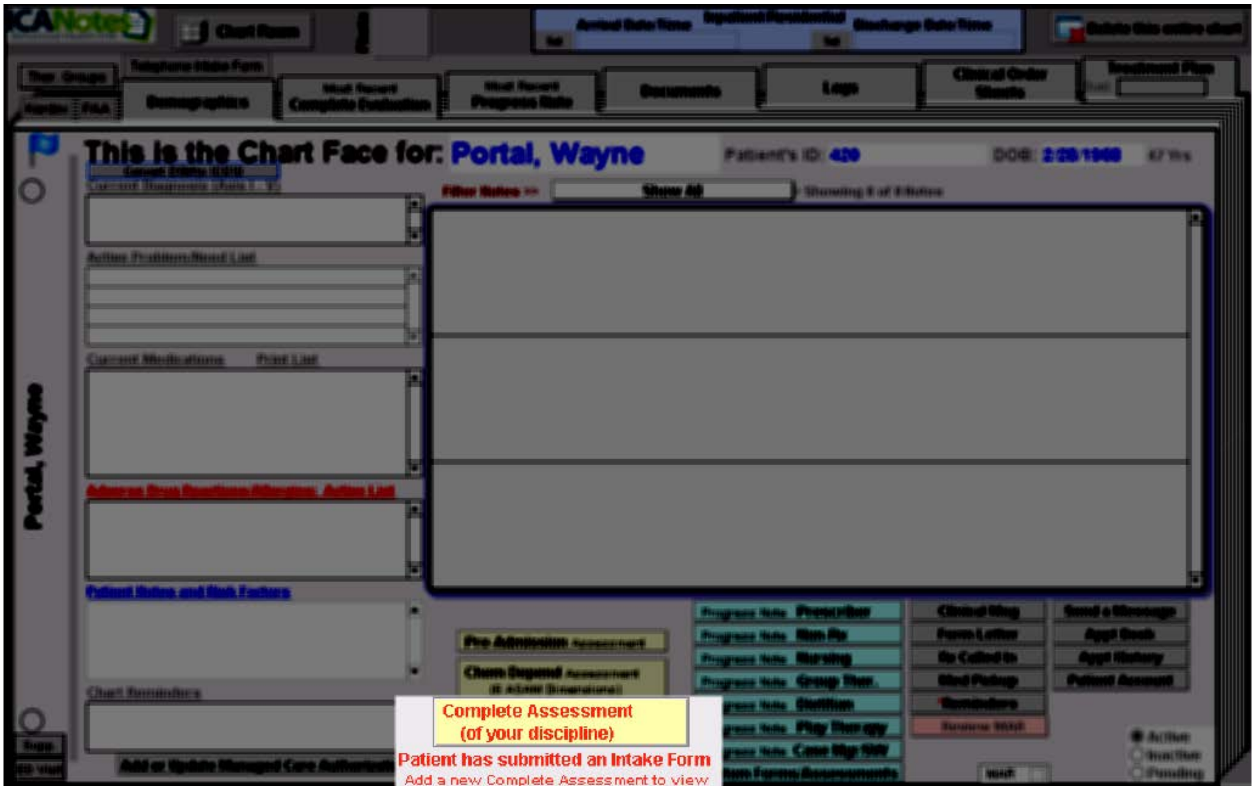
3. Once he/she reaches the bottom of the report, select **Save for later** to save progress or click **Continue** to go to the next tab. The **Back** button will bring the patient back to the previous tab.

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.

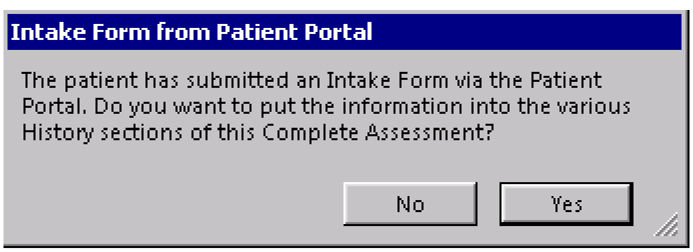


6. Once submitted by the patient, on the ICANotes Chart Face, this will show under the **Complete Assessment (of your discipline)** button.



7. When the 

button is pressed, this popup will populate.



8. Click 

to auto-populate the patient's responses to the Complete Assessment.

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.

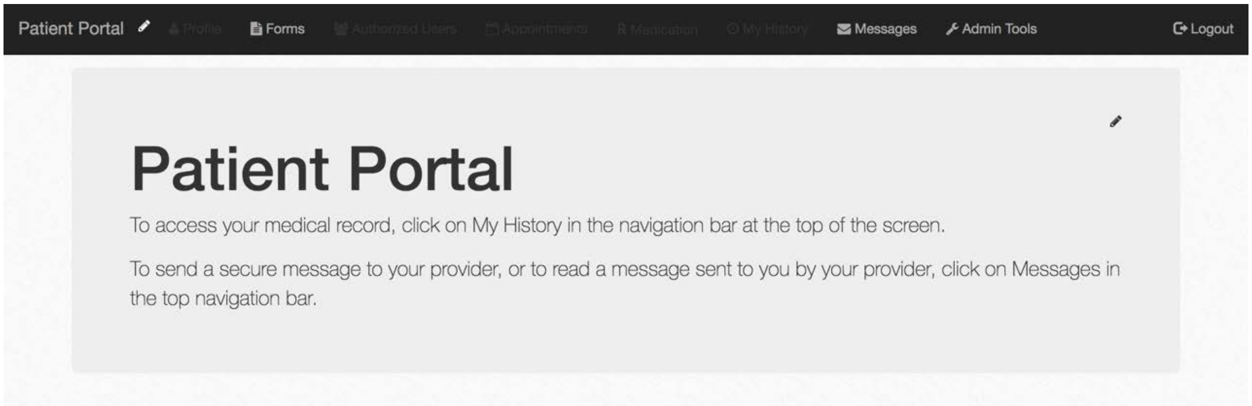
Clicking No will open up a Complete Assessment without the patient-provided intake form contents.

Forms Builder

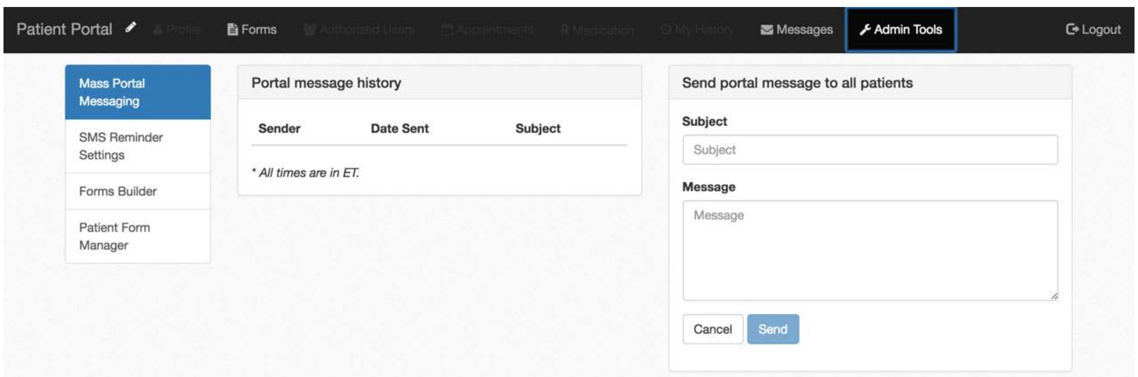
Practices using the Premium Patient Portal can create a form or post forms for patients to download from the portal so that they can be completed prior to their appointment.

Creating a Form

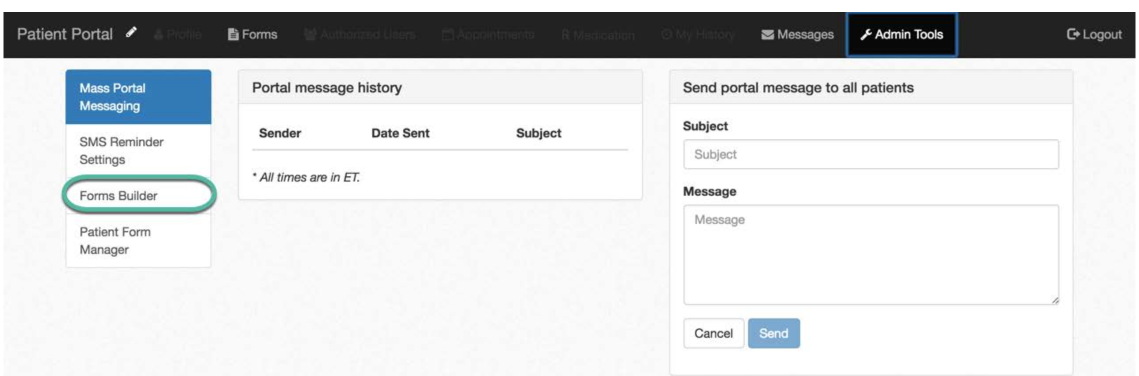
1. As a Portal Admin, log into the Patient Portal at https://patientonlineportal.com.



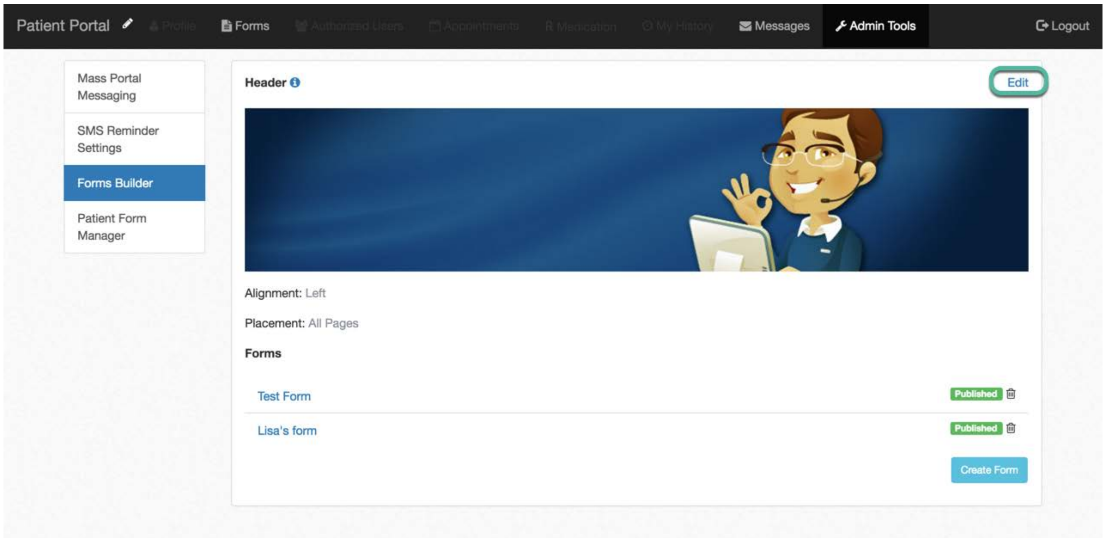
2. Click the Admin Tools link.



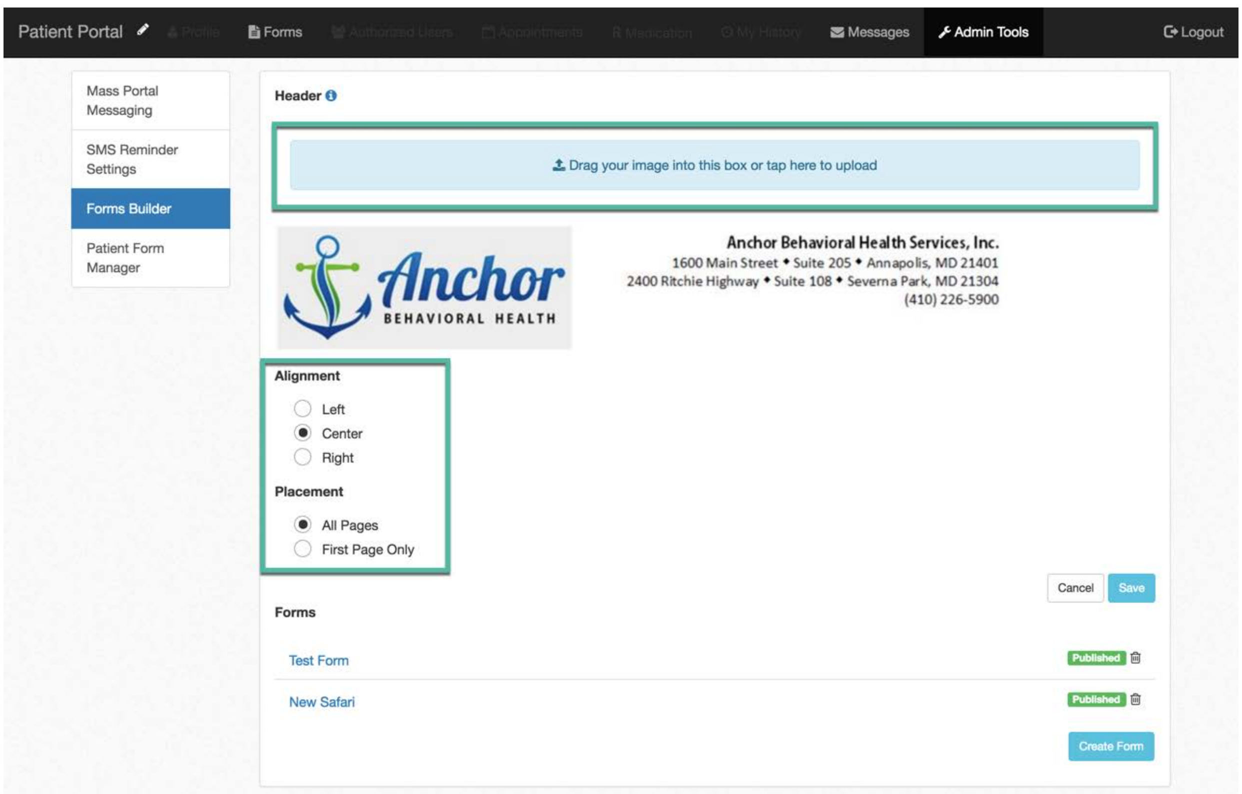
3. Select the Forms Builder button.



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.



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 Save button.

8. Click the 

button.

9. Type in a Form Name.

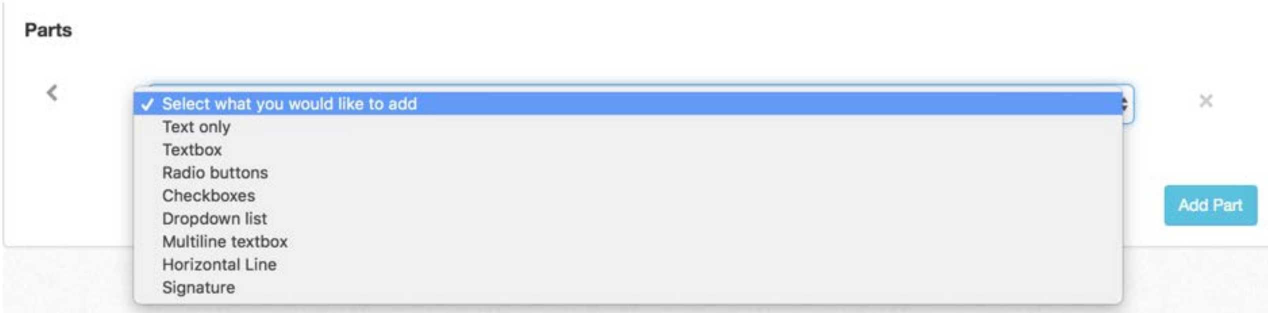
10. Include Header turn on/off using the slider. (Header created in steps 4 through 7 above)

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

12. In the Parts section, click the 

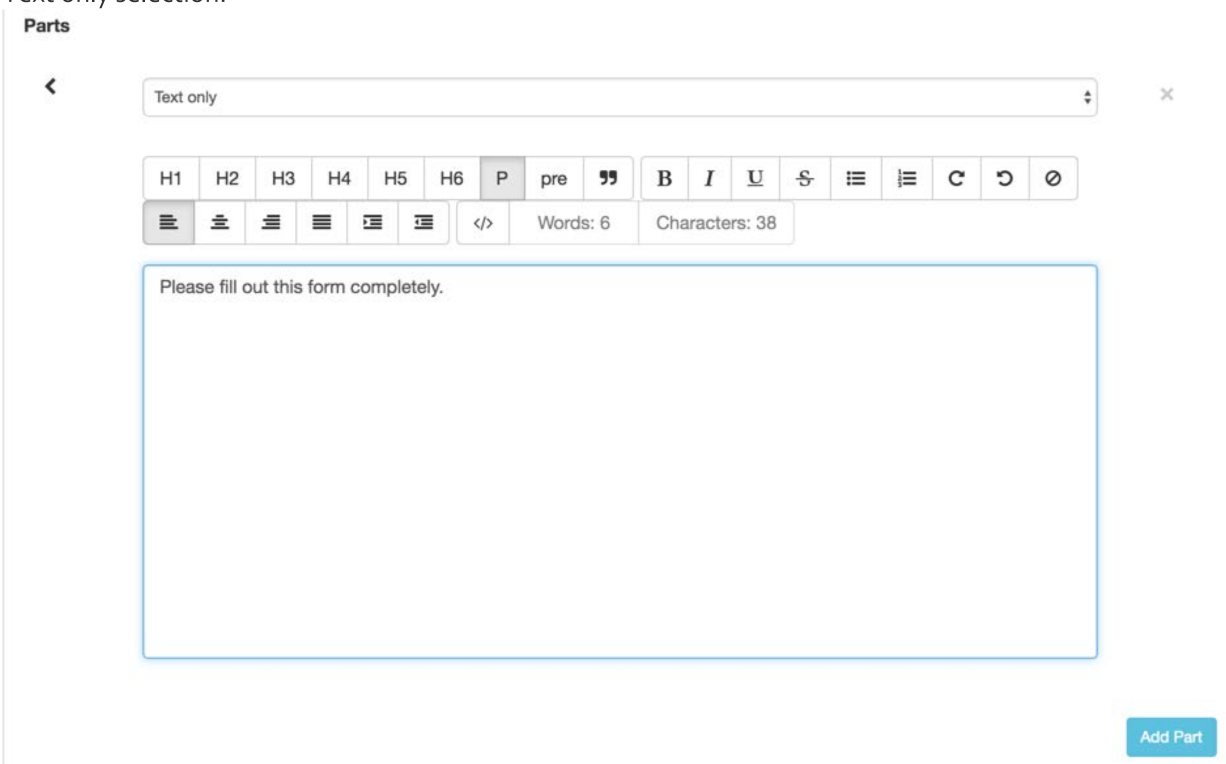
button. This is where you create the content of the form.

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



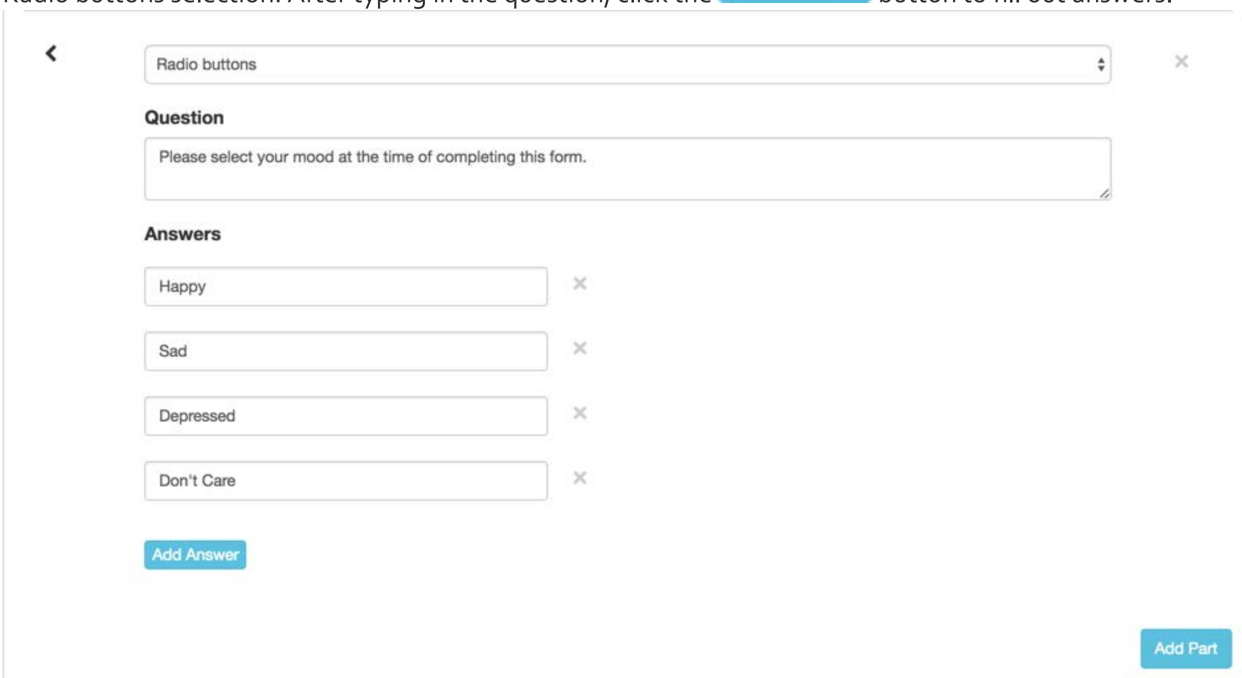
14. Click Add Part button to continue creating the form.

- Text only selection:

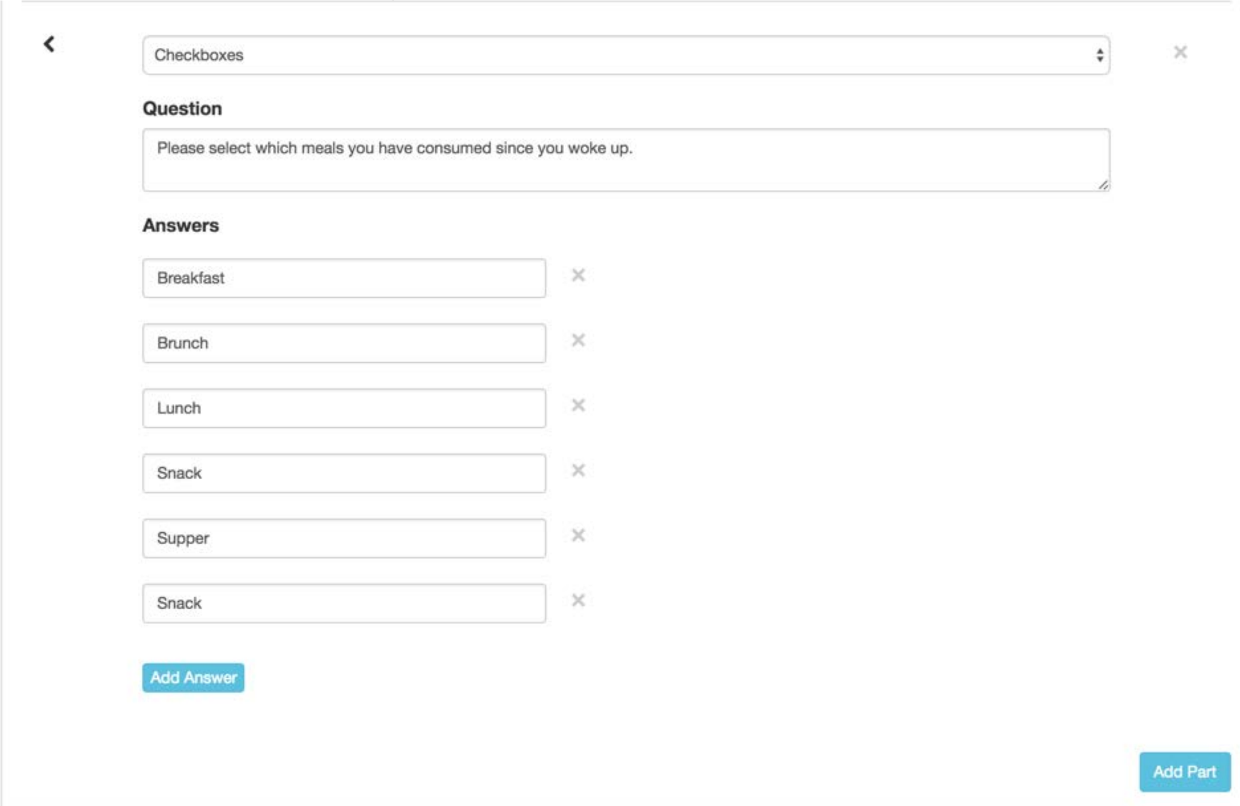


- Textbox selection:

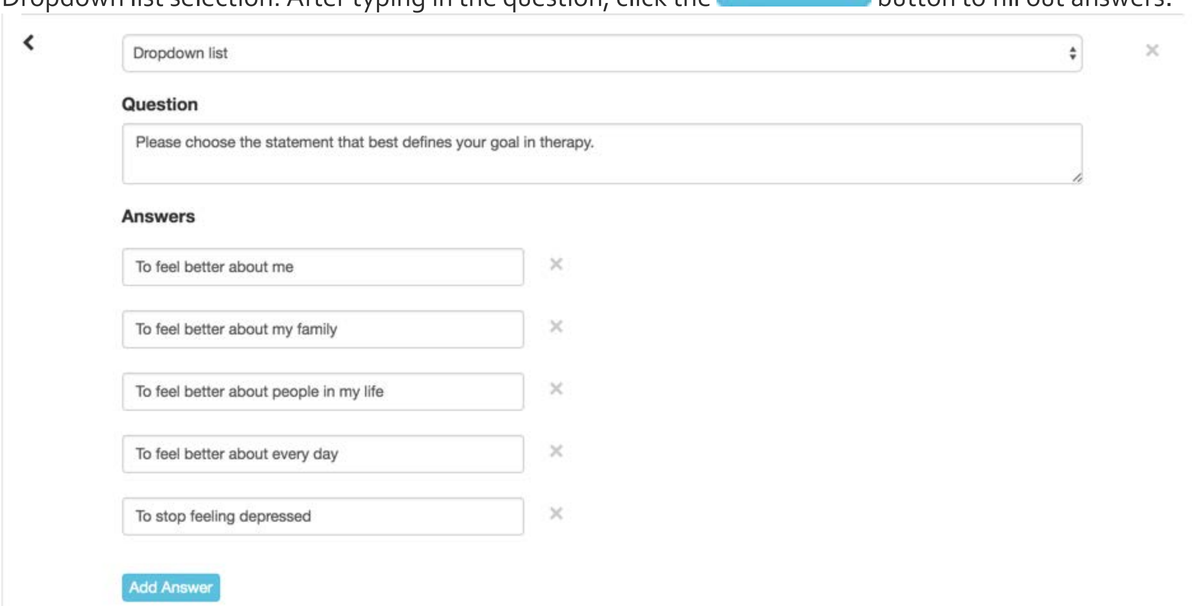
- Radio buttons selection: After typing in the question, click the Add Answer button to fill out answers.



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

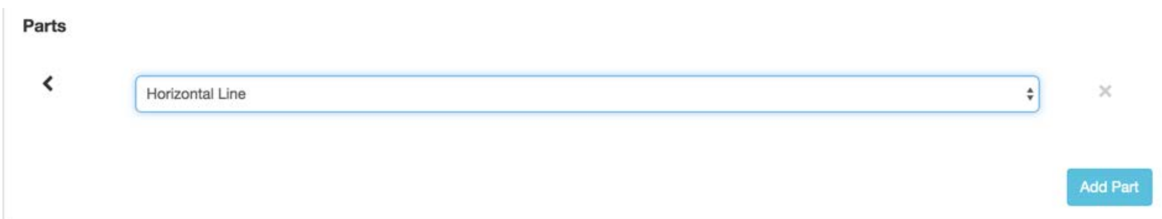


- Dropdown list selection: After typing in the question, click the Add Answer button to fill out answers.

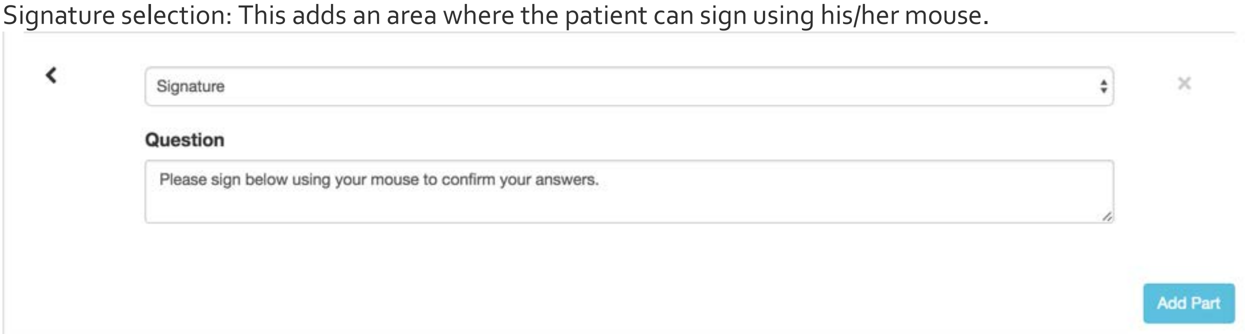


- Multiline textbox selection:

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



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



- The 

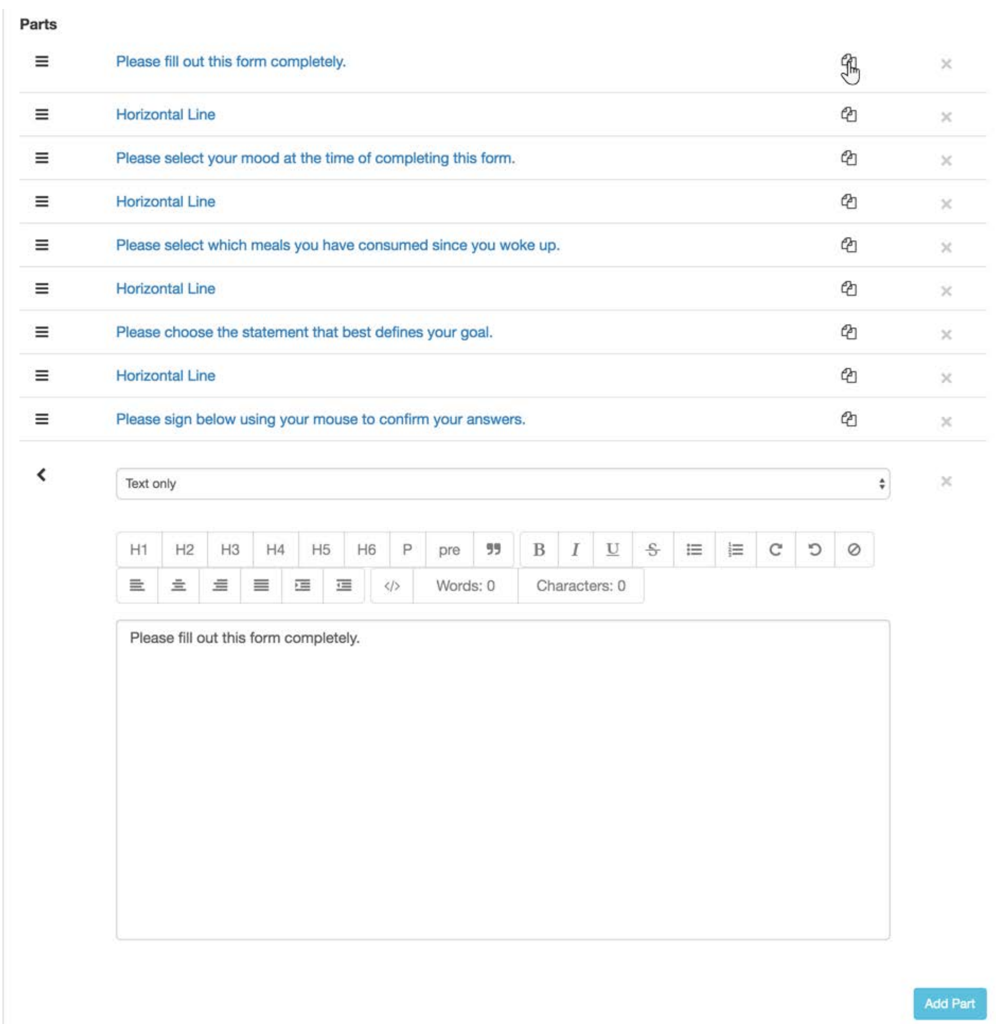
button will cancel all changes and go back to Forms Builder page.

- 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.)

- 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.



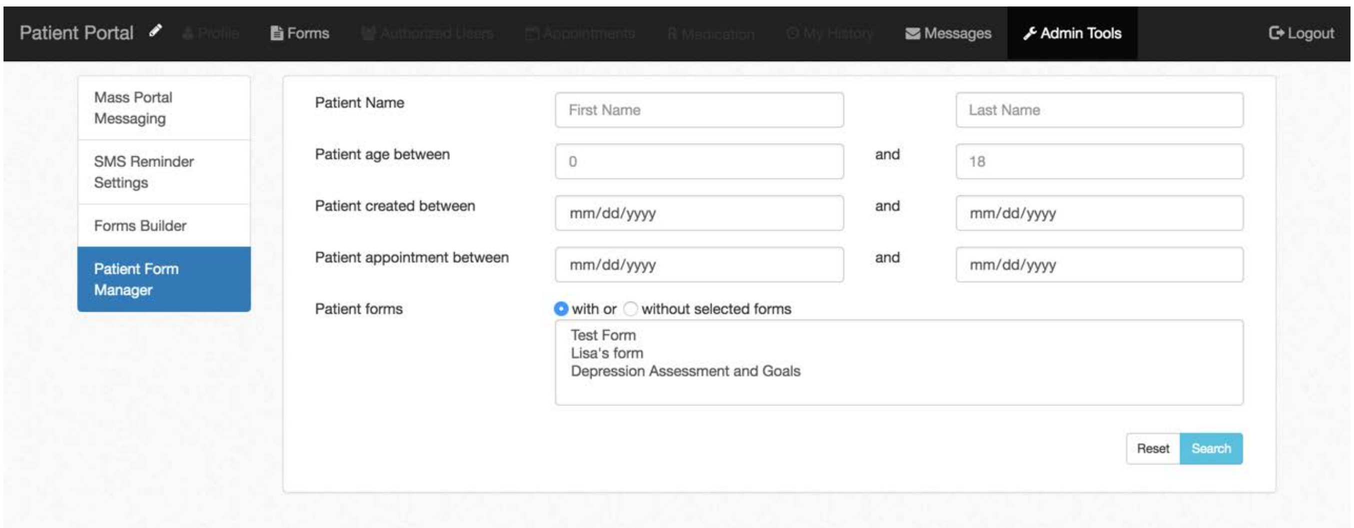
15. Once you have created your form, click the Preview button. You will see what the form will like for your patients.

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

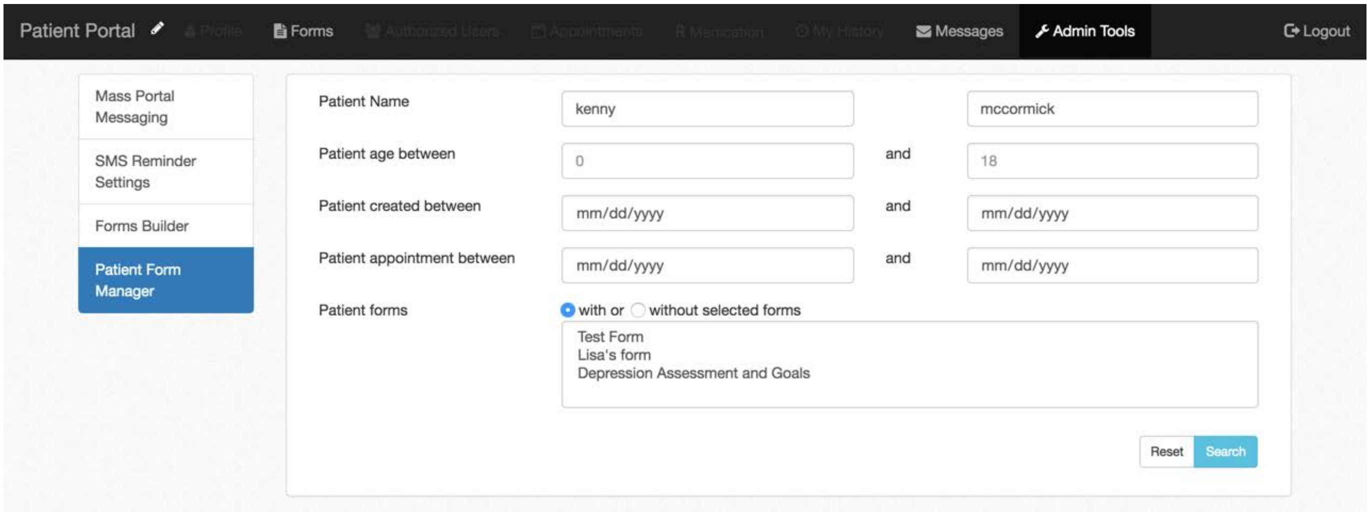
Patient Form Manager

Now we will send it to your patient.

1. Click the Patient Form Manager button.

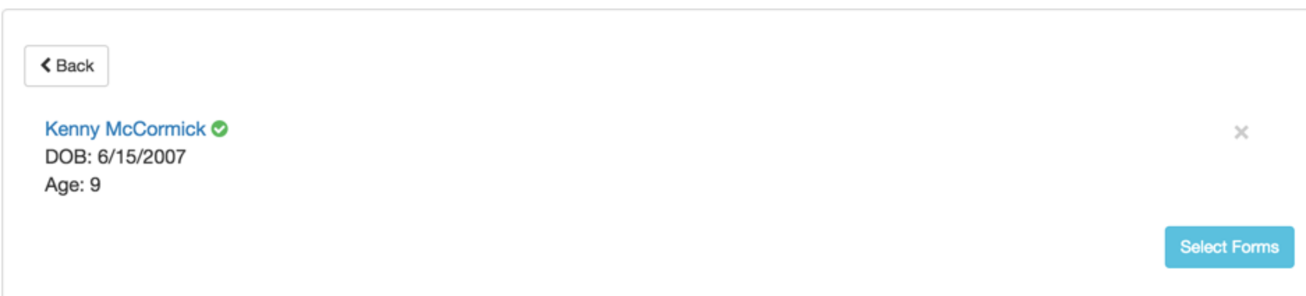


2. Search for your patient using Patient Name, Patient age between, Patient created between, or Patient appointment between. Click the Search button after criteria has been input.



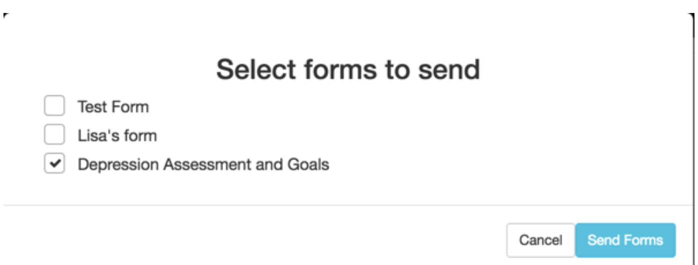
3. Patients that meet the criteria show. Click the 

button by his/her name.

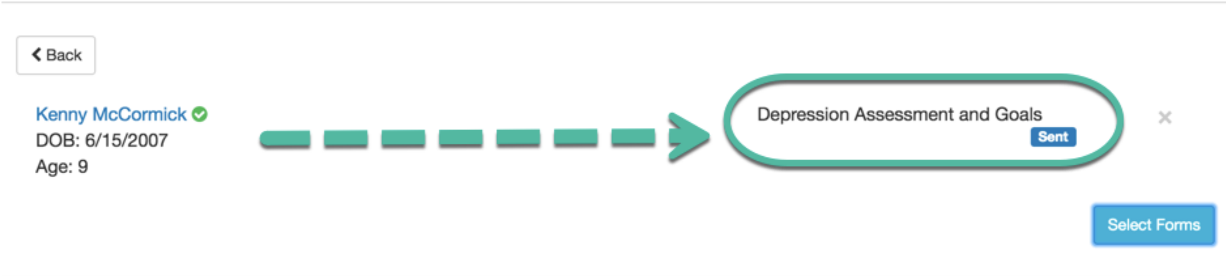


4. Select the forms to send to the patient and then click the 

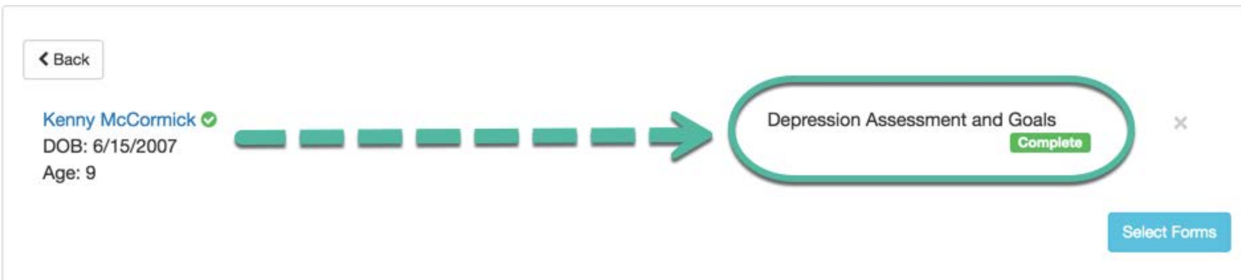
button.



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



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



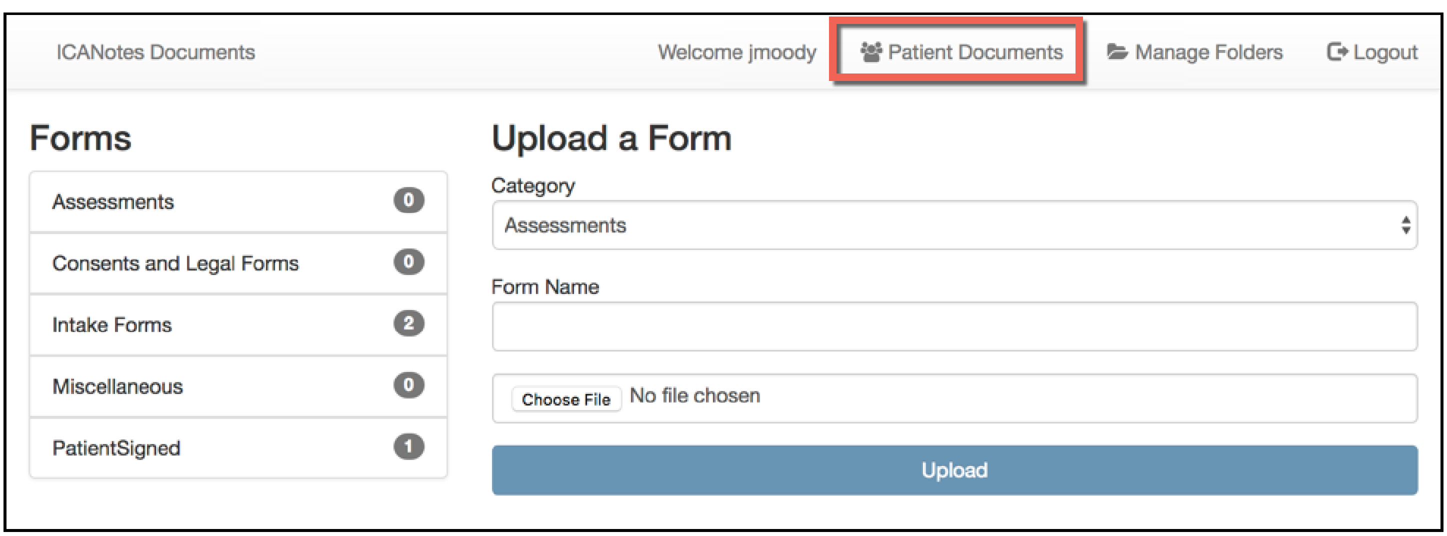
Fillable Form

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/.

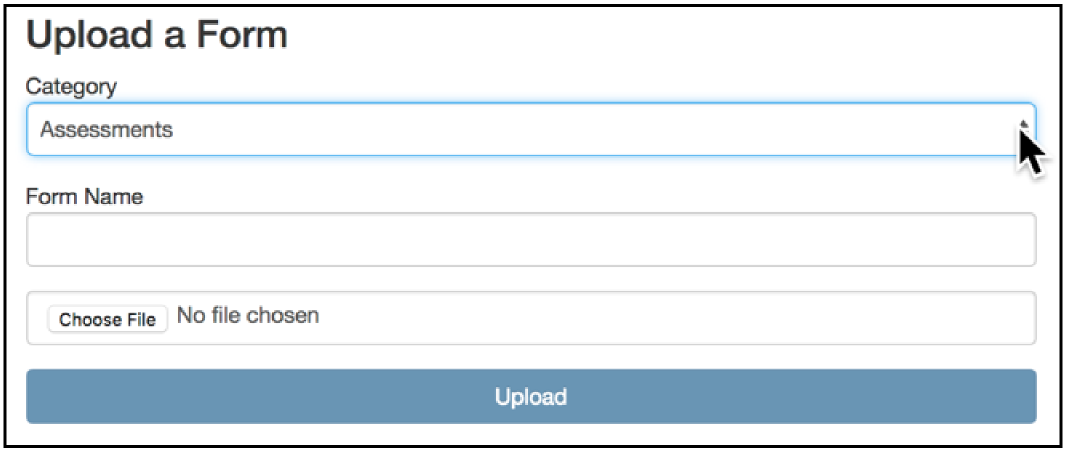
Fillable PDF forms that ICANotes created for use on the portal can be found at http://www.icanotes.com/content/portal-forms.

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

button.



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

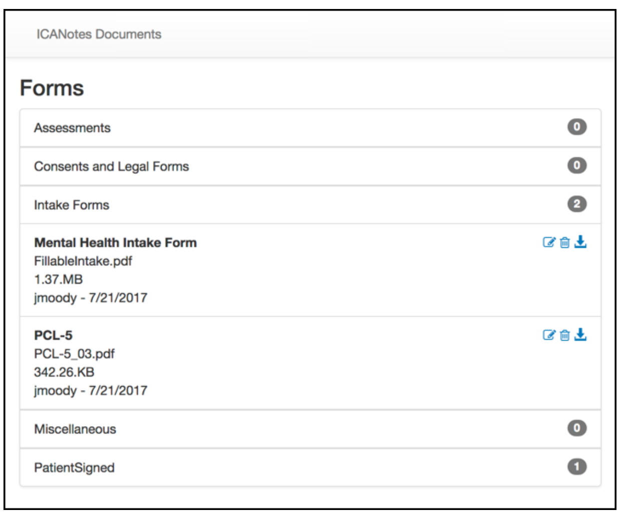


2. Enter the form name which should display on the portal.

3. Click Choose File and choose the file to upload

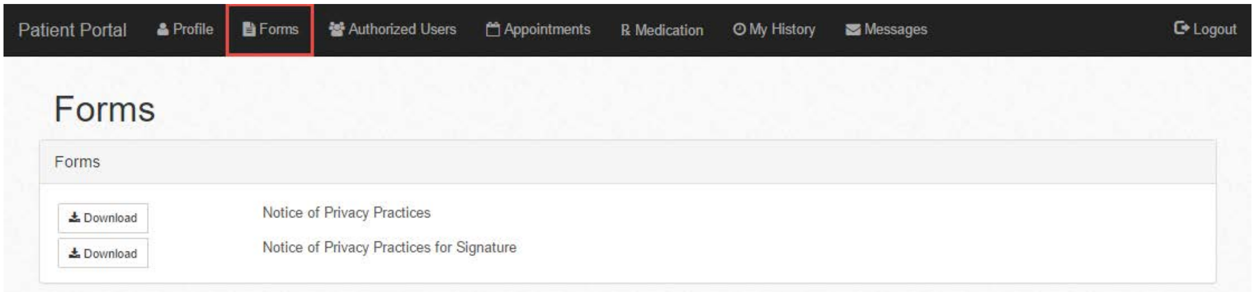
4. Next, click Upload button.

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



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



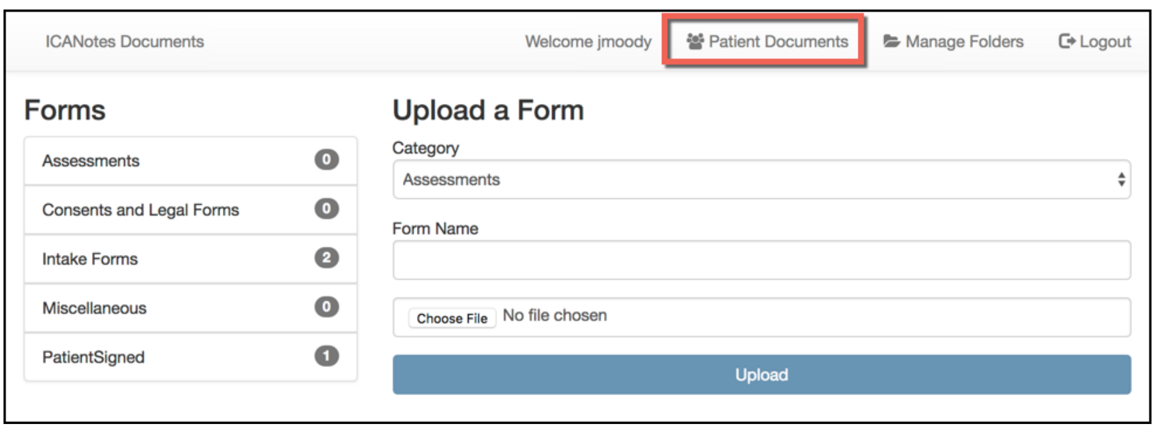
The patient can download the forms, save to their desktop, print or fill out form electronically, sign, and upload through the patient portal, after saving the electronically completed file or scanning the printed file.

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.

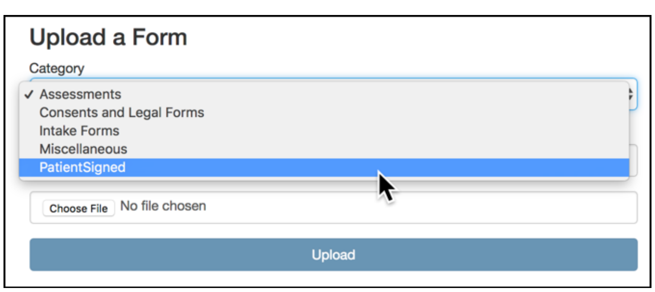
Adding Portal-Enabled Patient Signature Forms

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.

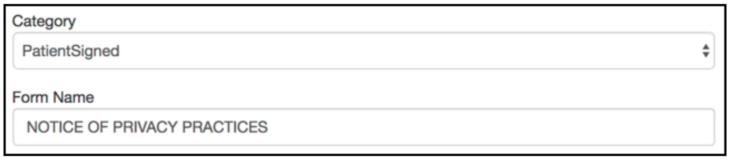
1. Click the Manage Forms button.

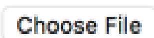


2. Select category of PatientSigned.

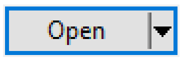


3. Name the form under Form Name.

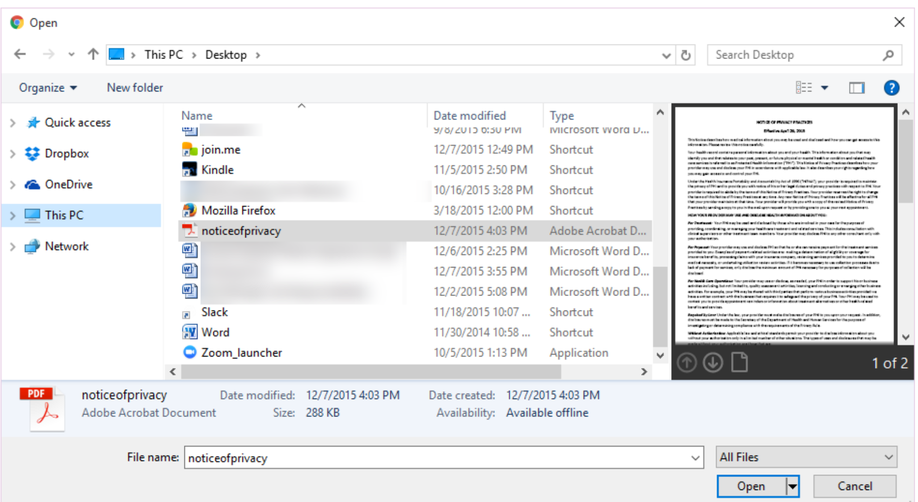


4. Click 

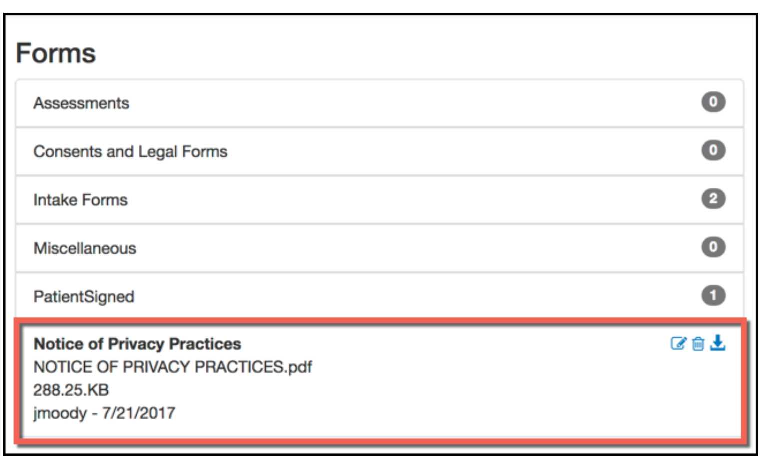
under the Upload a Form box.

5. Find the form on your desktop and click 

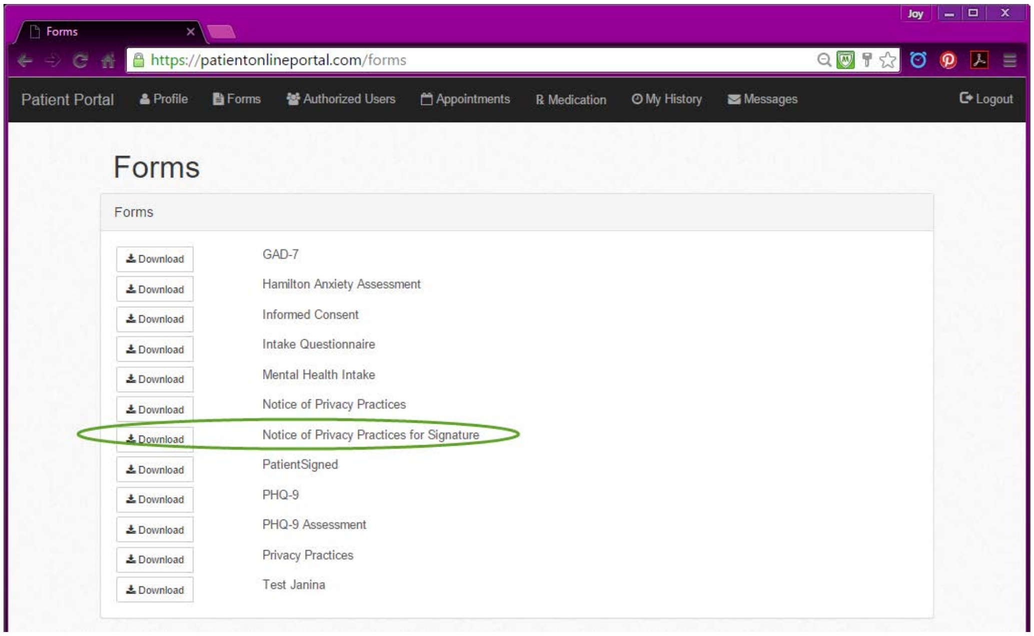
.



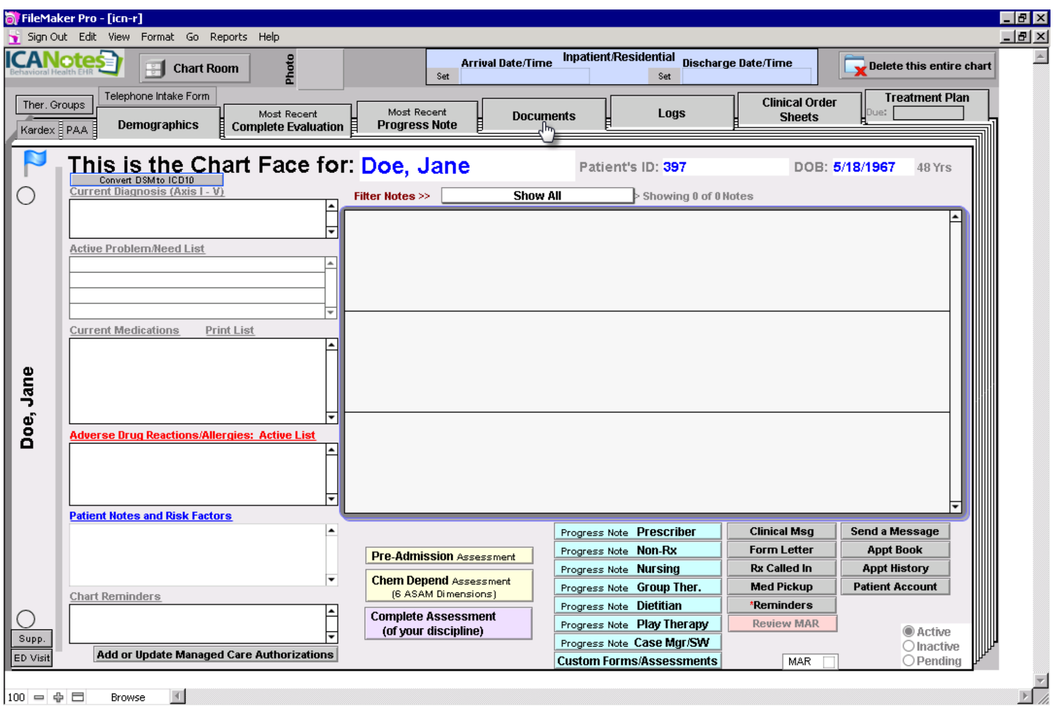
6. The form will now be under Patient signed under the Forms.



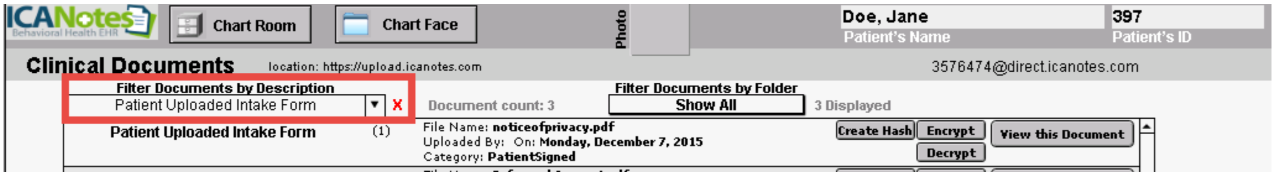
This form is now available on the patient portal for signature.



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

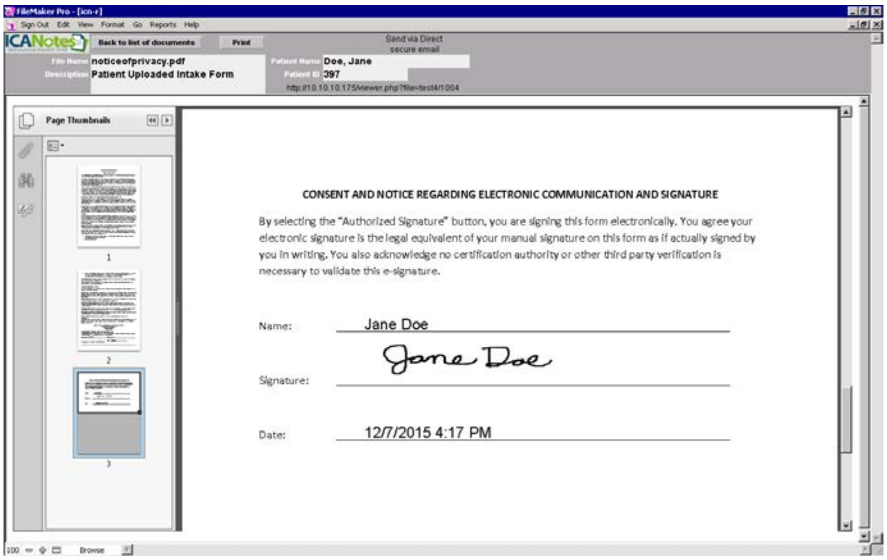


10. Under "Filter Documents by Description, Choose Patient Uploaded Intake Form.

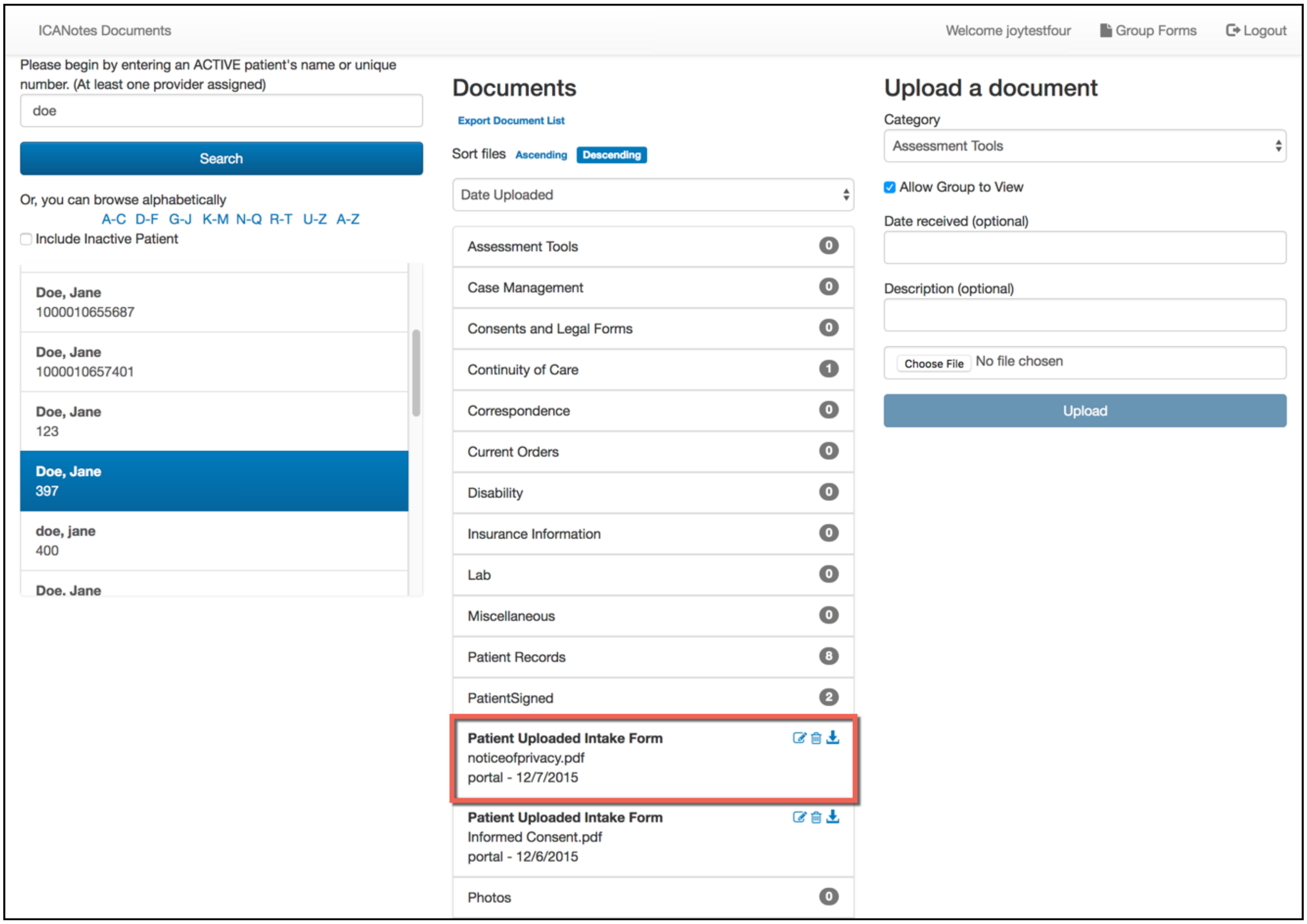


11. Click the **View this Document** by the patient form.

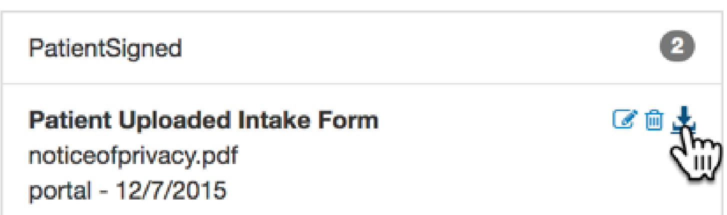
12. The last page will show the patient's signature.



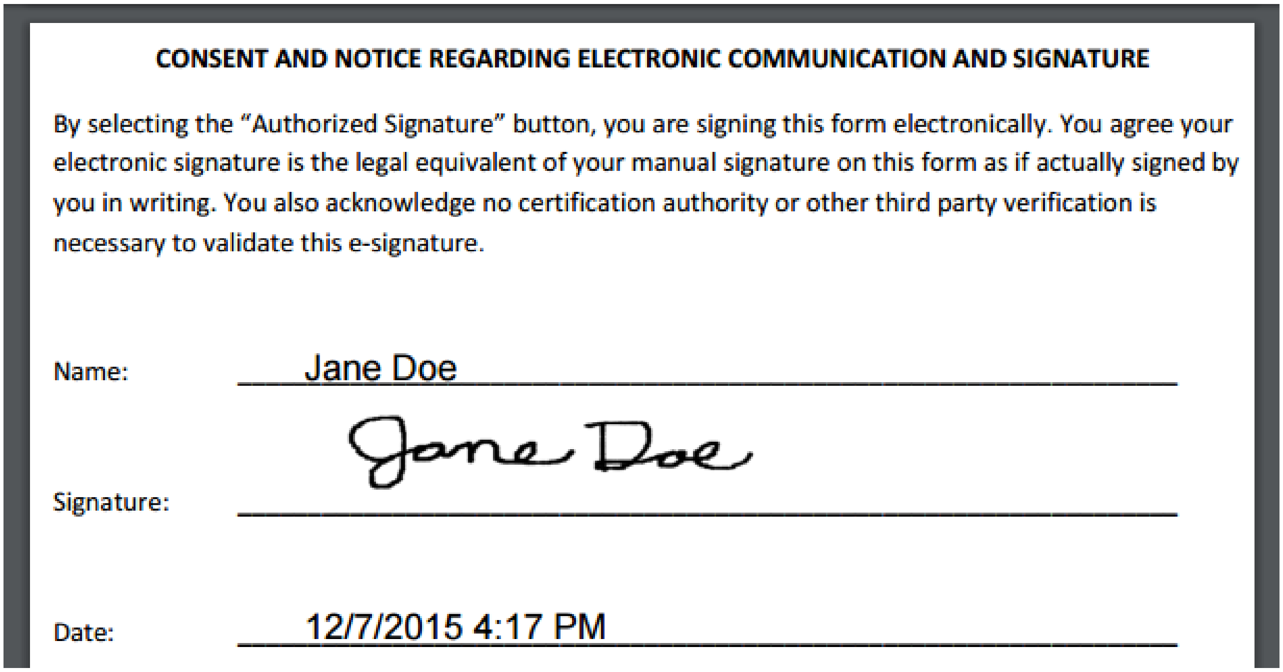
13. The form can also be found on the Upload site by searching for the patient and looking under the PatientSigned documents.



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



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



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

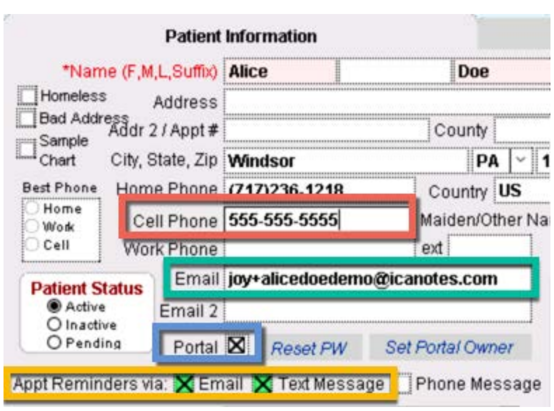
SMS Reminder Settings

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

- *Text reminders have an additional cost.*

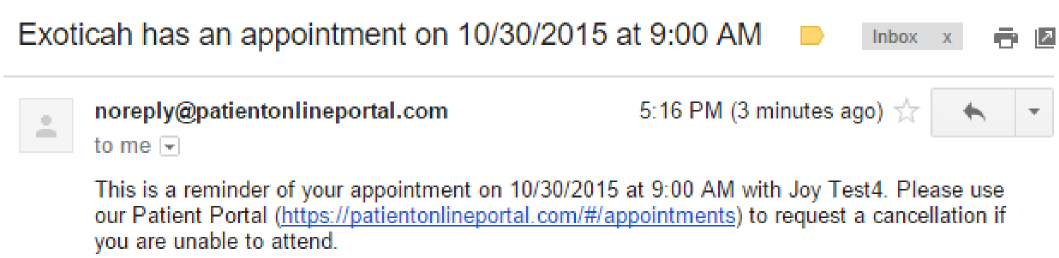
Setting Up Reminders in Demographics

- 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).

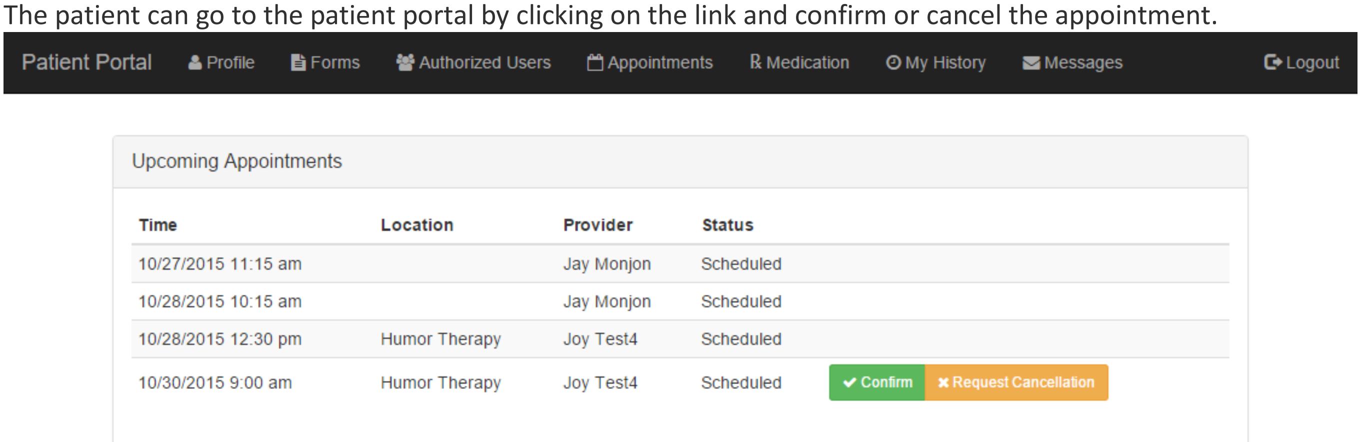


The patient will receive the reminder 48 hours before the appointment (default setting). If a new appointment is created within the 48-hour timeframe, an appointment reminder will be sent to the patient shortly after the appointment is saved.

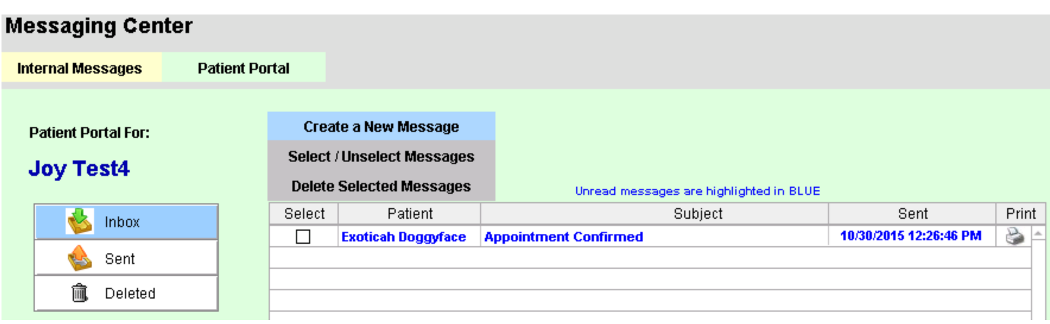
Email example:

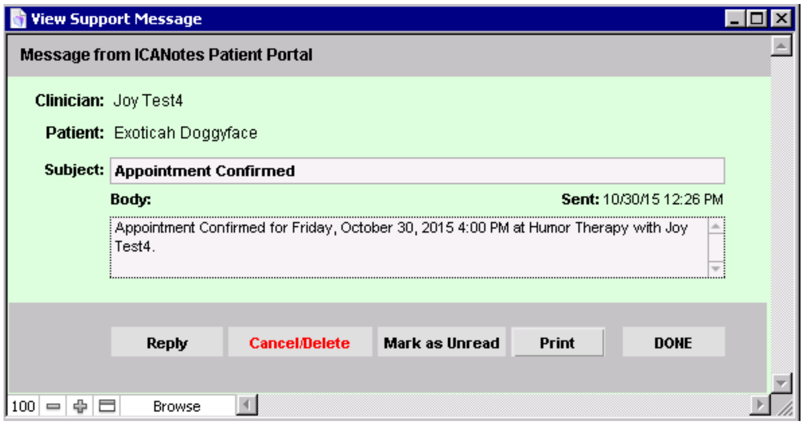


The patient can go to the patient portal by clicking on the link and confirm or cancel the appointment.

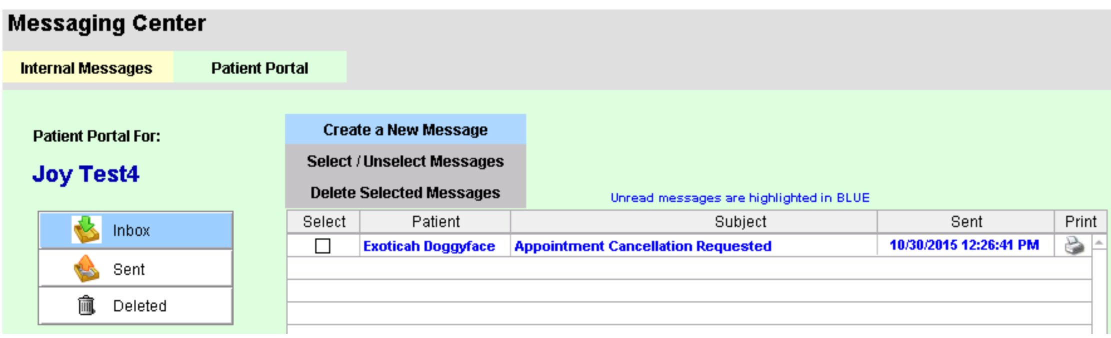


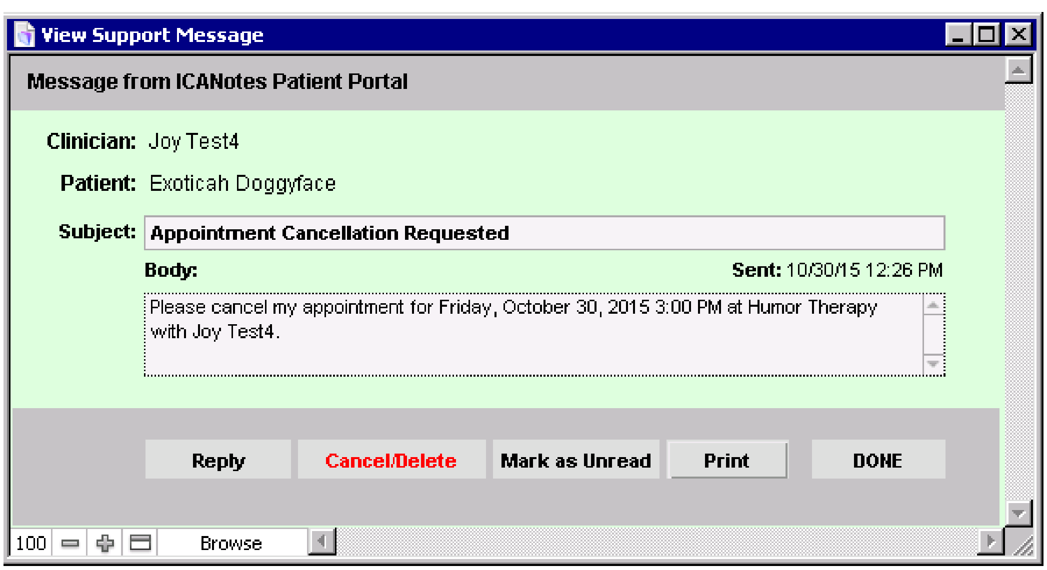
If confirmed, the provider will receive a message through the Messaging Center.



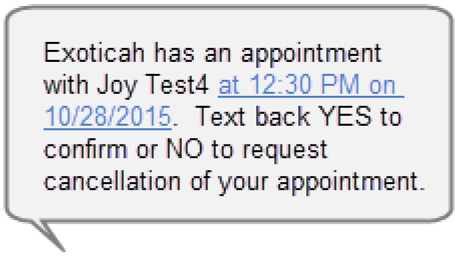


If cancelled, the provider will receive a message through the Messaging Center.





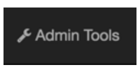
Example of text message:



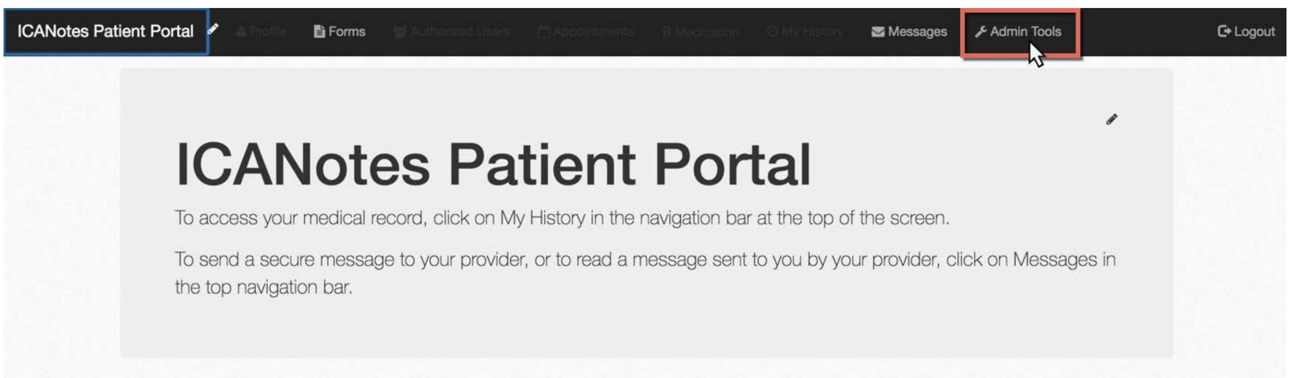
If the patient texts back YES, the Patient Reminder Status Report will show as confirmed.

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

Custom Text Reminders

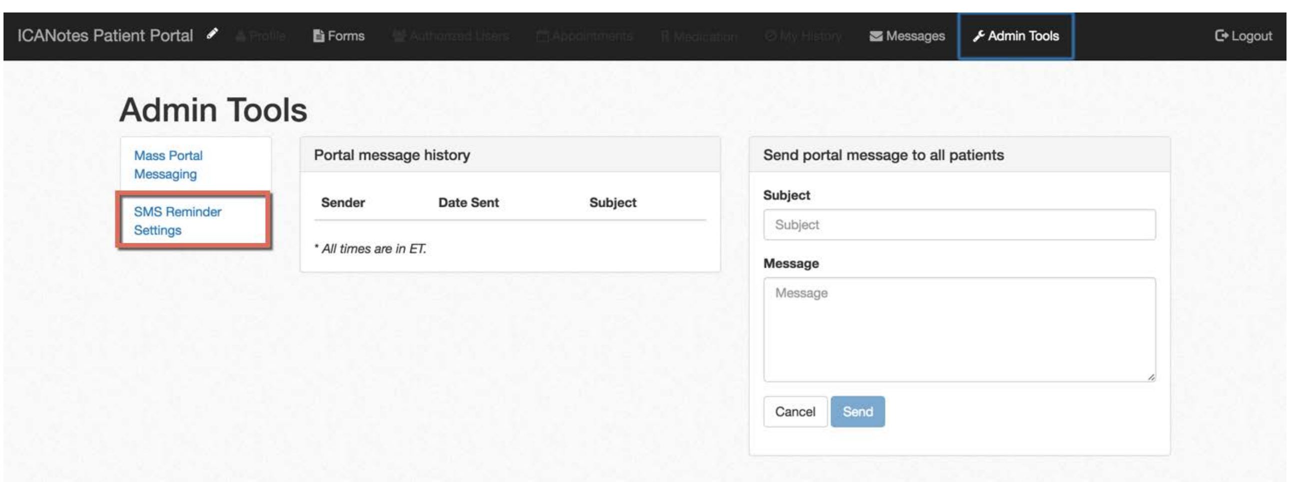
1. If you have text reminders activated, there will be a new selection available for Patient Portal Administrators under the 

tab in the Patient Portal.

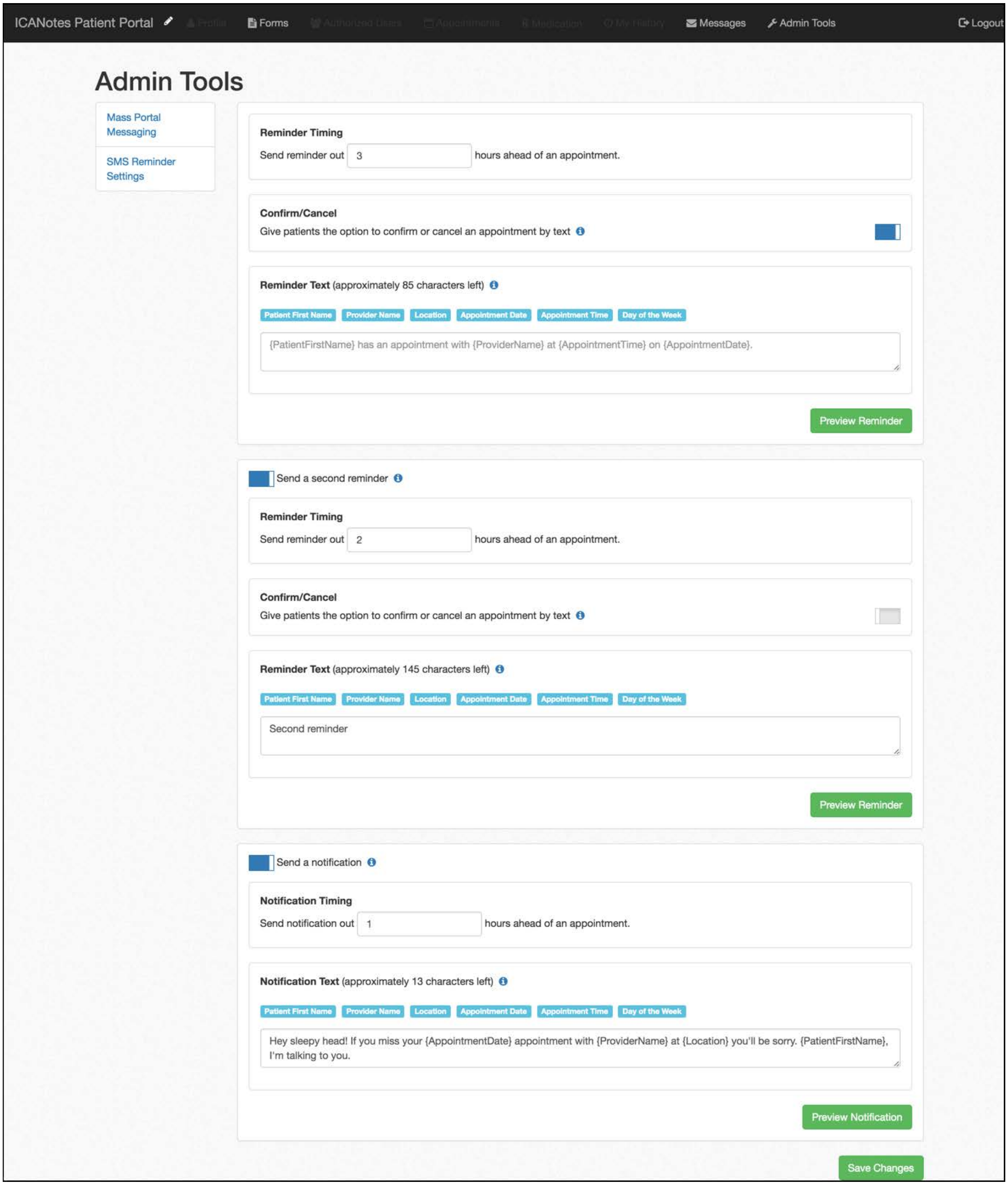


2. On Admin Tools, click the 

button.

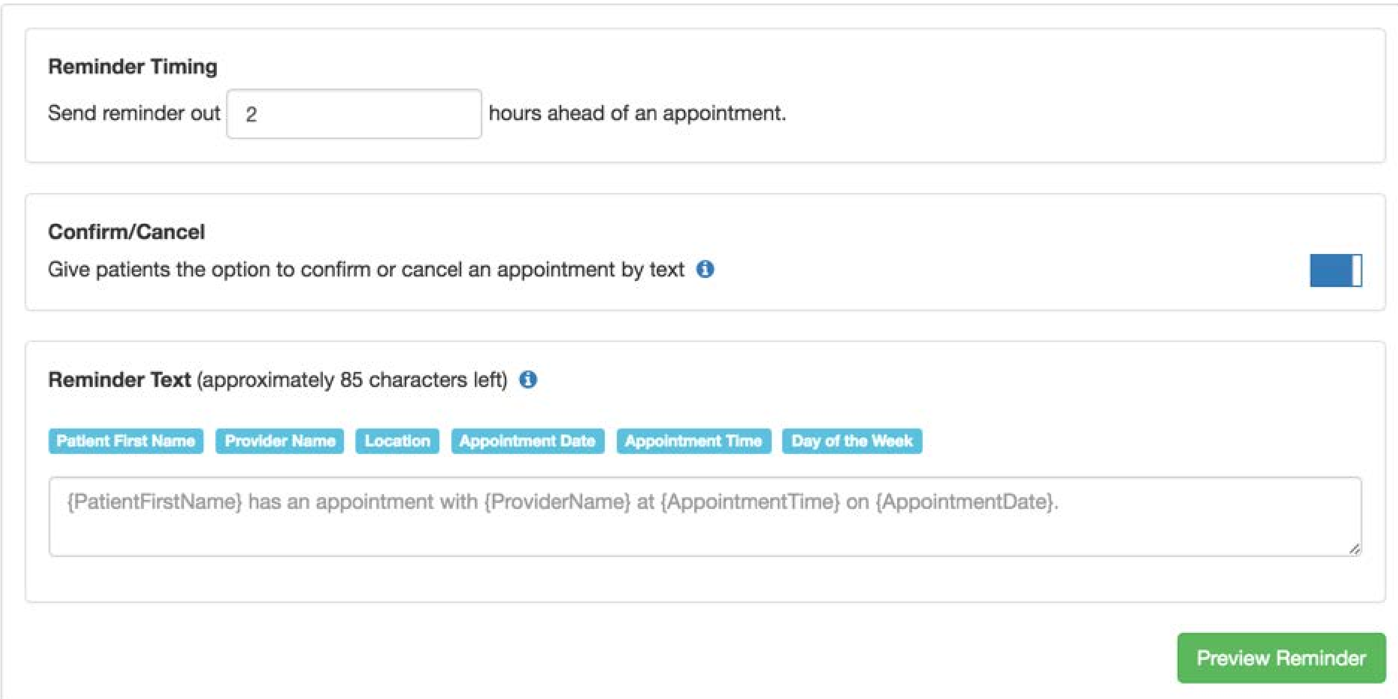


3. This area is split into three areas. The Reminder Timing, second Reminder Timing, and Notification Timing. The Reminder Timing is default and will be sent out, but the other two can be turned on/off. Let's look at these individually.

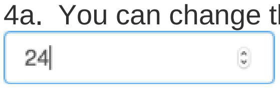


4. The Reminder Timing is default and will be sent out within 48 hours of the appointment. You have three areas that you can control.

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



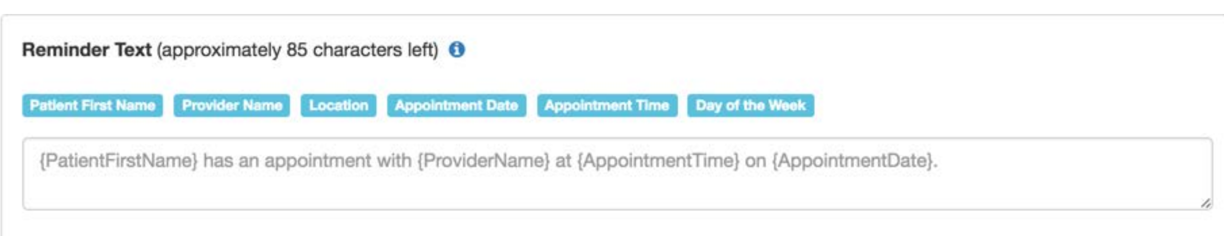
4a. You can change the hours ahead to send the reminder by using the arrows in the field.



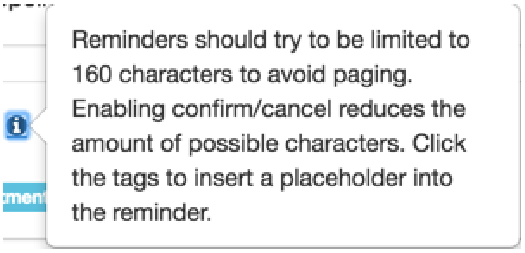
4b. Change the option to confirm/cancel by text by clicking the slider located on the right side.

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.

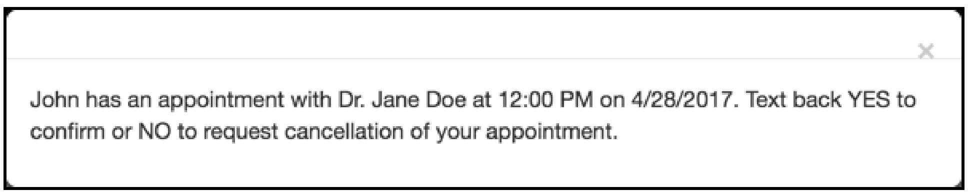
The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).



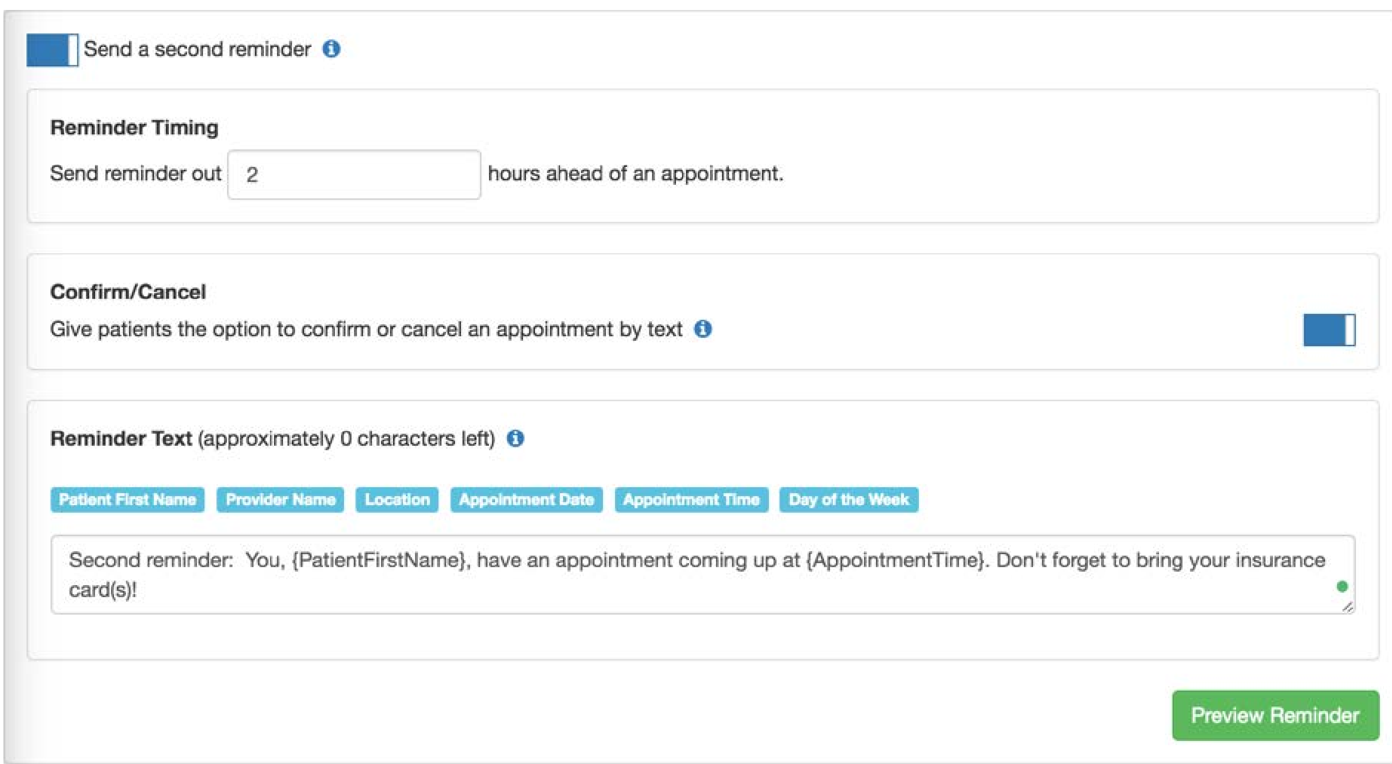
4d. The icon can be clicked for help.



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



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.

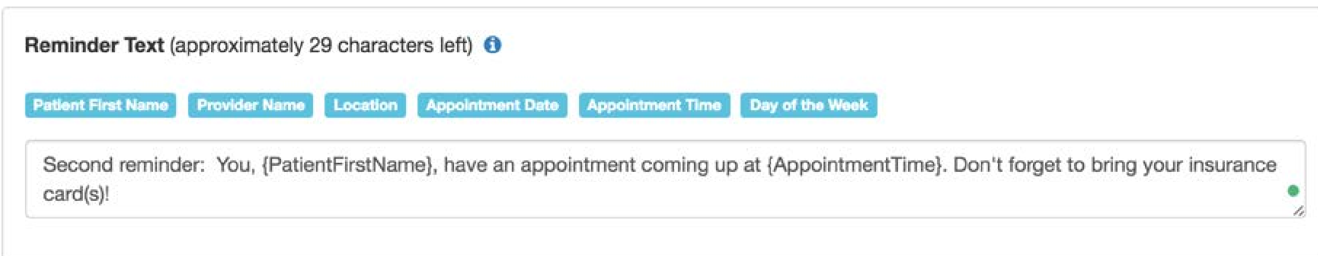


5a. You can change the hours ahead to send the reminder by using the arrows in the field.

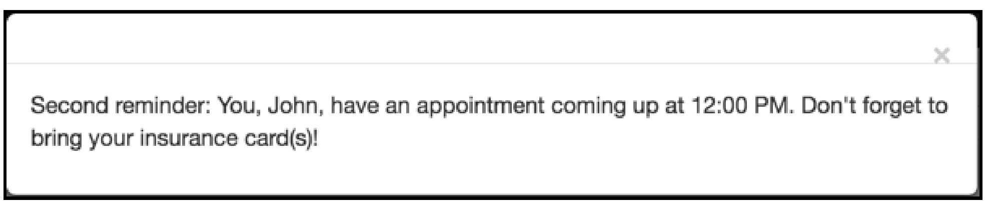
5b. Change the option to confirm/cancel by text by clicking the slider located on the right side.

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.

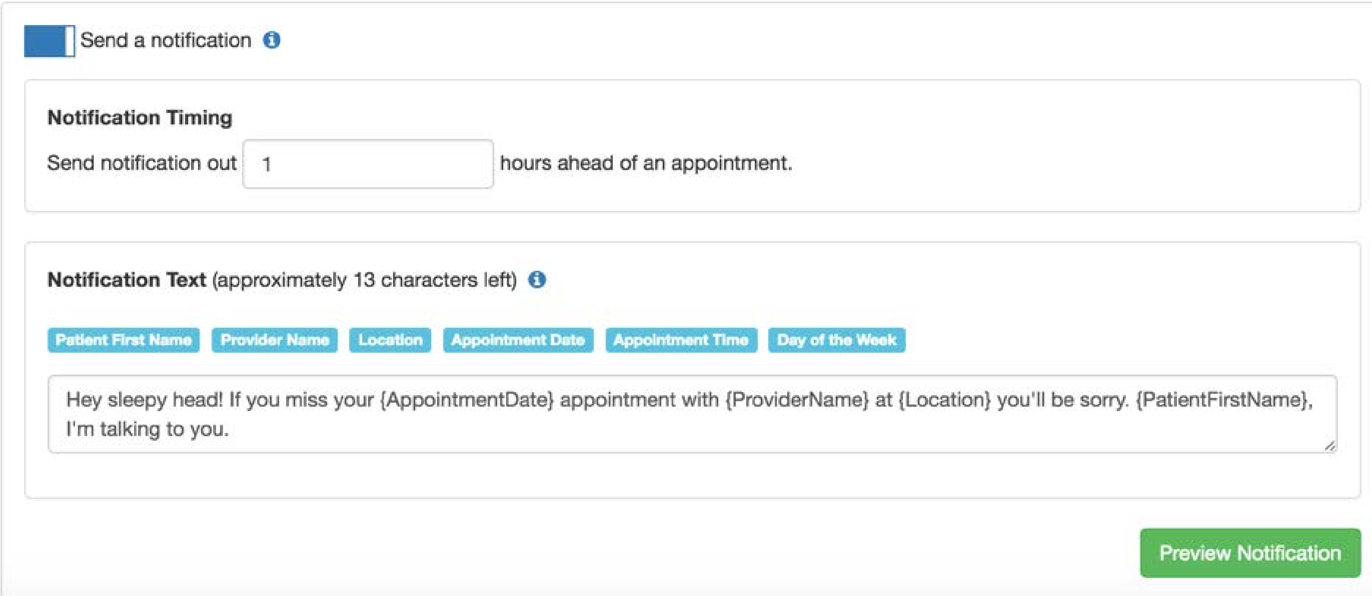
The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).



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



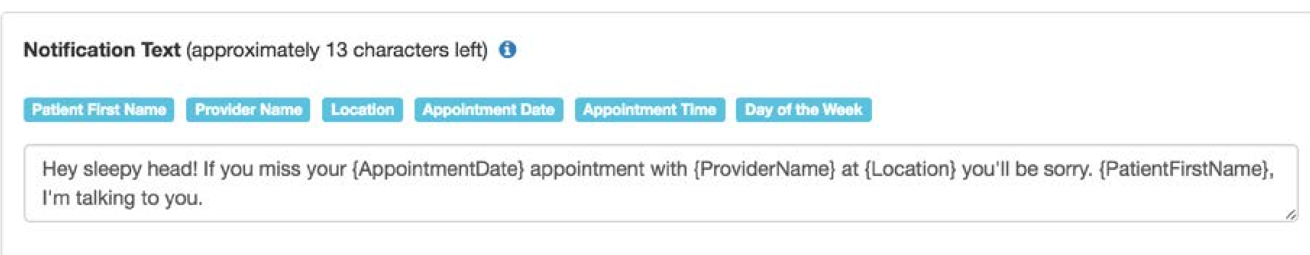
6. A notification timing can be sent after the initial reminder to to allow reminders to be sent further. This option can be turned on/off by using the slider located in the top left.



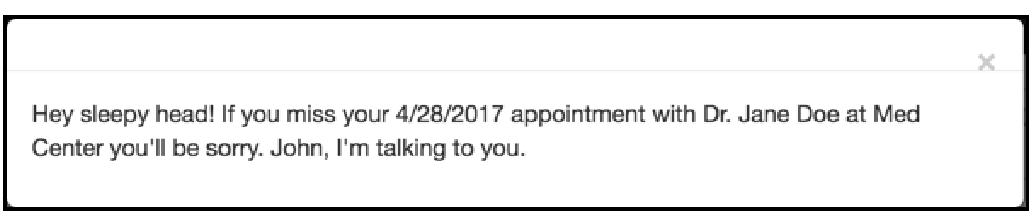
6a. You can change the hours ahead to send the reminder by using the arrows in the field.

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).

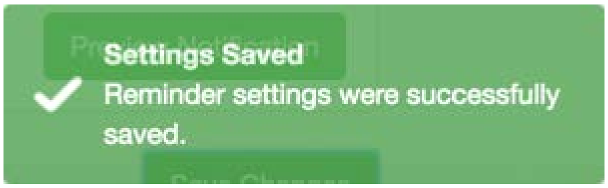


6c. Click the Preview Reminder button to see what the text will look like.



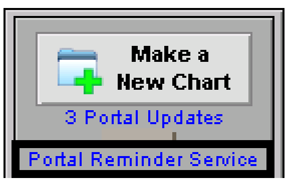
7. Once all of your texts are set, click the  button.

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.

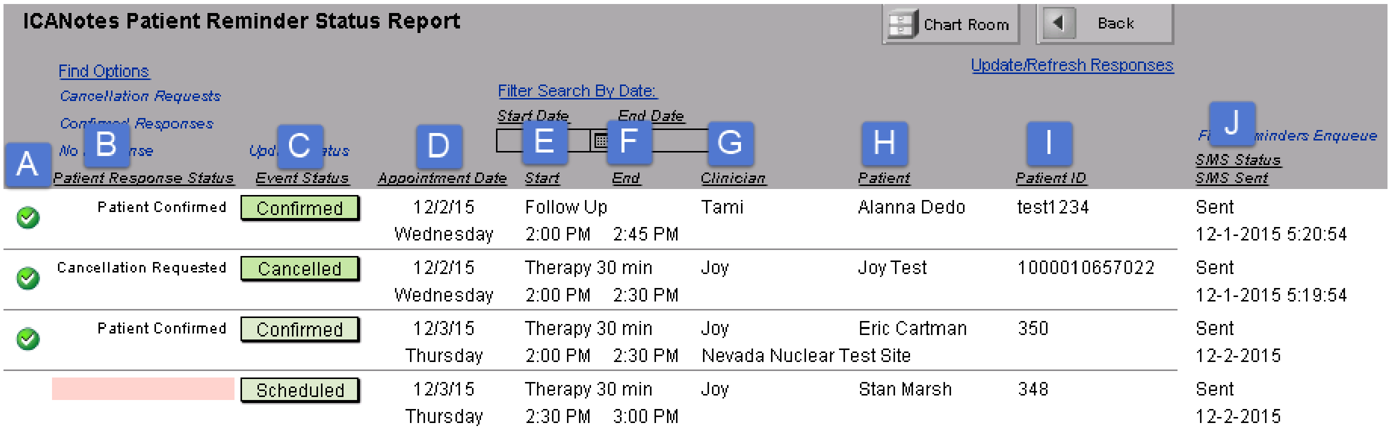
C. No Response - Appointments that the patients have not responded yet.

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.



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.

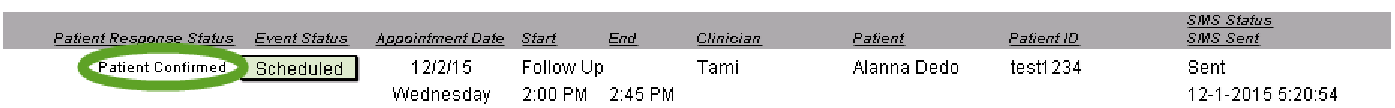
H. Patient - The patient's name.

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.



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

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

	Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status SMS Sent
	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).