Notice

NIH Clinical Center FollowMyHealth® Patient Portal Users

The following document is a general User Guide for the FollowMyHealth® product. There are features included in this guide that are currently not available in the NIH Clinical Center FollowMyHealth® Patient Portal. These features include:

- Billing
- eVisits
- Medications (viewing, add, renewal)
- Immunizations
- Any changes to your demographic information (name, address, phone number, emergency contact, etc.) do not come back to the NIH Clinical Center records for updating.

Some of these features may become available in the future. We apologize for the inconvenience. For any further questions or concerns, please contact the Portal Support Team at 1-855-644-6445.

Appointment viewing is now available in your NIH Clinical Center FollowMyHealth® Patient Portal. For instructions on how to access this information, please see our Frequently Asked Questions at https://www.cc.nih.gov/followmyhealth/pdf/FAQ.pdf.
# Table of Contents

Chapter 1: Supported browsers.................................................................7

Chapter 2: FMH Secure Sign In account.....................................................9

Chapter 3: Get started as a new user........................................................11
  Create a new FollowMyHealth account through an email invitation........11
  Create a new FollowMyHealth account without an email invitation.......15
  Create a new FollowMyHealth account and connect to another account as an authorized individual........................................22

Chapter 4: Sign in as an existing user.........................................................31
  Sign in as an existing user with FMH Secure Sign In...............................31
  Sign in as an existing user with an alternative authentication method......33

Chapter 5: Connect your existing account................................................35
  Connect your existing FollowMyHealth account to a different organization through an email invitation..................................................35
  Connect your existing FollowMyHealth account to another account as an authorized individual.........................................................37

Chapter 6: Static toolbar............................................................................41
  Search the patient portal.................................................................42
  My Account......................................................................................43
    Manage My Connections.............................................................43
      Add a connection to an organization........................................47
      Edit organization clinic settings.................................................49
      View providers..........................................................................49
      Send a provider profile..........................................................50
      Add an authorized individual....................................................51
    Manage billing............................................................................51
      Billing questions.......................................................................52
      Pay your bill............................................................................54
Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage account preferences</td>
<td>55</td>
</tr>
<tr>
<td>Manage sign-in methods</td>
<td>56</td>
</tr>
<tr>
<td>Set notification preferences</td>
<td>60</td>
</tr>
<tr>
<td>Set display preferences</td>
<td>63</td>
</tr>
<tr>
<td>Delete your universal health record account</td>
<td>64</td>
</tr>
<tr>
<td>Restore deleted information</td>
<td>65</td>
</tr>
<tr>
<td>View activity history</td>
<td>65</td>
</tr>
<tr>
<td>Get technical support and assistance</td>
<td>66</td>
</tr>
<tr>
<td>Support information</td>
<td>66</td>
</tr>
<tr>
<td>Chapter 7: The Home tab</td>
<td>69</td>
</tr>
<tr>
<td>Health Summary</td>
<td>69</td>
</tr>
<tr>
<td>Action Center</td>
<td>69</td>
</tr>
<tr>
<td>Recent Activity</td>
<td>71</td>
</tr>
<tr>
<td>Appointments</td>
<td>72</td>
</tr>
<tr>
<td>Check-in for your appointment</td>
<td>73</td>
</tr>
<tr>
<td>Request an appointment</td>
<td>74</td>
</tr>
<tr>
<td>Directly schedule an appointment</td>
<td>77</td>
</tr>
<tr>
<td>View upcoming appointments</td>
<td>80</td>
</tr>
<tr>
<td>Reschedule an appointment</td>
<td>82</td>
</tr>
<tr>
<td>Cancel an appointment</td>
<td>82</td>
</tr>
<tr>
<td>View past and other appointments</td>
<td>83</td>
</tr>
<tr>
<td>Billing</td>
<td>84</td>
</tr>
<tr>
<td>App Center</td>
<td>84</td>
</tr>
<tr>
<td>Install applications</td>
<td>85</td>
</tr>
<tr>
<td>Manage a Health Journal entry</td>
<td>86</td>
</tr>
<tr>
<td>Manage My Charts data</td>
<td>88</td>
</tr>
<tr>
<td>Download your health data with Blue Button</td>
<td>90</td>
</tr>
<tr>
<td>Enter a blood sugar reading</td>
<td>91</td>
</tr>
<tr>
<td>Know My Health</td>
<td>93</td>
</tr>
<tr>
<td>Single sign on</td>
<td>93</td>
</tr>
<tr>
<td>Health Sources</td>
<td>94</td>
</tr>
<tr>
<td>Access Health Sources from My Account</td>
<td>96</td>
</tr>
<tr>
<td>Access Health Sources on the Home tab</td>
<td>96</td>
</tr>
<tr>
<td>Access Health Sources from a goal</td>
<td>97</td>
</tr>
<tr>
<td>Set up devices</td>
<td>99</td>
</tr>
<tr>
<td>Connect to health sources</td>
<td>99</td>
</tr>
<tr>
<td>Connect an iHealth health source</td>
<td>101</td>
</tr>
<tr>
<td>Connect a Telcare health source</td>
<td>102</td>
</tr>
<tr>
<td>Connect a Withings health source</td>
<td>102</td>
</tr>
<tr>
<td>Device list</td>
<td>103</td>
</tr>
<tr>
<td>Chapter 8: eVisits</td>
<td>107</td>
</tr>
</tbody>
</table>
## Table of Contents

- Request an eVisit from your Inbox..............................107
- Request an eVisit from Providers.............................121

### Chapter 9: Inbox..................................................131
- Compose email messages........................................131
- Create and edit Inbox folders.................................132

### Chapter 10: My Health.......................................133
- Summary..............................................................133
- Manage your care team list.....................................134
- Export health summary documents........................135
- Import health summary documents.........................136
- Conditions............................................................136
  - Add an active condition.......................................136
  - Add a surgical history condition........................137
  - Add a family health condition............................138
  - Add a personal health condition.........................139
- Medications..........................................................140
  - Add a medication...............................................140
  - Add a pharmacy................................................141
  - Request a medication renewal.............................142
- Allergies..............................................................143
  - Add an allergy....................................................143
- Immunizations......................................................144
  - Add an immunization.........................................145
  - View immunization details..................................146
  - View CDC immunization schedules.....................147
  - View vaccine information sheets.........................147
  - Share your immunization record.........................148
- Results.................................................................149
  - Add a result.......................................................149
  - Graph results....................................................150
  - View results.....................................................150
- Vital signs.............................................................151
  - Add a vital sign................................................152
- Documents..........................................................152
  - Add a document................................................153
- Chart.................................................................153
- Goals.................................................................154
  - Goal types.........................................................155
    - Weight management goal................................155
    - Monitor weight goal........................................157
    - Monitor blood glucose goal.............................158
<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor blood pressure goal</td>
</tr>
<tr>
<td>Manage your goals</td>
</tr>
<tr>
<td>View goals and readings</td>
</tr>
<tr>
<td>Accept a new goal</td>
</tr>
<tr>
<td>Add a reading</td>
</tr>
<tr>
<td>Decline a new goal</td>
</tr>
<tr>
<td>Decline an active goal</td>
</tr>
<tr>
<td>Access Health Sources from a goal</td>
</tr>
<tr>
<td>Notifications</td>
</tr>
<tr>
<td>Add a reminder</td>
</tr>
<tr>
<td>Delete a reminder from My Reminders</td>
</tr>
<tr>
<td>Edit a reminder from My Reminders</td>
</tr>
</tbody>
</table>

**Chapter 11: My Info** ................................. 179

<table>
<thead>
<tr>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>179</td>
</tr>
<tr>
<td>Edit demographics</td>
<td>179</td>
</tr>
<tr>
<td>Edit your preferred pharmacy</td>
<td>180</td>
</tr>
<tr>
<td>Edit emergency contact</td>
<td>180</td>
</tr>
<tr>
<td>Edit responsible party</td>
<td>181</td>
</tr>
<tr>
<td>Edit insurance information</td>
<td>181</td>
</tr>
</tbody>
</table>

**Index** ........................................... 183
Chapter 1

Supported browsers

The following browsers are supported by the Allscripts FollowMyHealth® Patient Access patient portal.

> Microsoft® Internet Explorer® 9.0 or later

  **Note:** You must use Microsoft® Internet Explorer® 10.0 or later if you want to view goals from the **Goals** tab.

> Mozilla Firefox® 38 or later
> Google Chrome™ 34 or later
> Apple® Safari® 8.0 or later
Chapter 2

FMH Secure Sign In account

You must create FMH Secure Sign In credentials when you create your patient portal account. This is a unique FollowMyHealth® user name and password used to access the patient portal.

The icon identifies the FMH Secure Sign In section on the sign-in window.

It is best practice to use your FMH Secure Sign In account for signing in to your patient portal record, but if you currently use Facebook, Google, Yahoo!, or have a Microsoft® account, you can use the user name and password associated with 1 of these accounts. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information in your patient portal account is NEVER shared, posted, or exchanged with these services.

You are required to keep your FMH Secure Sign In account connected to your portal account even if you do not use it. Sign-in methods are managed in the patient portal at My Account > Preferences > Sign In Preferences. All alternative methods can be removed, but you cannot remove your FMH Secure Sign In credentials.

When you create your new patient portal account, the email address that is associated with your account or the email that your organization has on record for you, is automatically used as your FMH Secure Login user name.

2-step Verification is an optional security feature that you can add to your sign-in process. This verification provides a second layer of security to protect your account.

You can enable 2-step verification after your account is created. See the section in this guide, "2-step verification", for more information.
Chapter 3

Get started as a new user

You can get started as an Allscripts FollowMyHealth® Patient Access user by creating an account through an email invitation sent from your provider, creating an account from the patient portal sign-in window, or creating an account and connecting the account to an existing account as an authorized individual.

Review the following scenarios and select the scenario that fits your situation. Each scenario includes step-by-step instructions to get started using the patient portal.

> Create a new FollowMyHealth® account through an email invitation.
> Create a new FollowMyHealth® account without an email invitation.
> Create a new FollowMyHealth® account and connect to another as an authorized individual.

Create a new FollowMyHealth® account through an email invitation

Your provider sends you an email invitation with a registration link to www.followmyhealth.com. The email invitation contains an individualized link to the Allscripts FollowMyHealth® Patient Access sign-in window.

Before you begin

The user name and password that you create are your FMH Secure Sign In credentials. Best practice is to use this specific patient portal user name and password to sign in to your account.

The FMH Secure Sign In section is identified by the icon.

There are alternative sign in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo!, or have a Microsoft® account, you can use the user name and password associated with either of these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information within FollowMyHealth® is NEVER shared, posted, or exchanged with these services.

1. From the email, click the Click here to begin registration link. The FollowMyHealth® sign-in window for new connections opens.
Chapter 3 Get started as a new user

Welcome to FollowMyHealth®, an innovative health engagement solution that empowers patients to take a more active role in managing their care.

FollowMyHealth is used by tens of thousands of physicians as the “power” behind their hospital or clinic’s specific patient portal.

Whether you’re looking to keep an eye on your weight, monitor your blood pressure, or manage a chronic condition, FollowMyHealth is the tool for you!

First time using FollowMyHealth?
Sign Up and Connect

Already a FollowMyHealth user?
Sign in and add this connection

Note: Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but Sign Up and Connect and Sign in and add this connection are always displayed.

2. Click **Sign Up and Connect**.
   **Sign Up and Connect** opens.
Create a new FollowMyHealth account through an email invitation

3. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window.
   The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name.
   After you create your account, this email address is also listed under **My Info > Demographics > Contact Information**.

   **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message indicating the guideline that was not followed is displayed in red bold font.

4. For **Password**, enter a password that meets the requirements listed on the right side of the window.

5. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

   **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth® account), the following error message is displayed: Someone already has that user name. Please try a different one. You must enter a new valid user name to proceed.

6. Click **Confirm and Continue**.
   The **Invite Wizard** starts and **Connect your account Step 1: Welcome** opens.
   The progress bar represents the step you are on during the account connection process.

7. Click **Next**.
Connect your account Step 2: Accept Terms of Service opens.

8. Click I Accept to accept the terms of service.
   
   **Note:** You must accept the terms of service. You can also access the privacy policy on this step by clicking Privacy Policy.

Connect your account Step 3: Enter Invite Code opens.

9. Enter the invitation code from your healthcare organization and click Next.
   
   **Note:** The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

Connect your account Step 4: Release of Information opens.

The ROI permits FollowMyHealth® to obtain and store your medical information from the organization. If you decline, you are not connected to the organization, cannot view your medical information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth® and the ROI is expired, Release of Information opens. You must click I Accept to renew the ROI and stay connected to the organization and continue to view your medical information. If you click Decline, a confirmation window opens where you must confirm that you want decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

10. Click I Accept to release your healthcare record to FollowMyHealth®.

Connect your account Step 5: Upload Health Record opens.

This window displays the progress of retrieving data from the organization. Monitor the progress to ensure the data is uploaded successfully.

When the upload is complete, the patient portal opens.

Results of this task

You have created a new account and connected to the organization that sent you the email invitation.

View pending connections at My Account > My Connections.
Create a new FollowMyHealth account without an email invitation

If you did not receive an invitation from your provider, but want to become a Allscripts FollowMyHealth® Patient Access user, you must create an account from the FollowMyHealth® sign-in window.

Before you begin
The user name and password that you create are your FMH Secure Sign In credentials. Best practice is to use this specific FollowMyHealth® user name and password to sign in to your account.

The FMH Secure Sign In section is identified by the icon.
There are alternative sign-in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo®, or have a Microsoft® account, you can use the user name and password associated with either of these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to FollowMyHealth®. Information within FollowMyHealth® is NEVER shared, posted, or exchanged with these services.

1. Go to www.followmyhealth.com or the URL provided by the organization. The FollowMyHealth® sign-in window opens.
Chapter 3 Get started as a new user

**Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign In** and **or, use an alternative**, and **I need to sign up** are always displayed.

2. Click **I need to sign up**.
   **Sign Up and Connect** opens.
3. Enter the applicable information in the boxes.

**Notifications Email**

Specify an email address where you can receive notifications regarding your health record. This email address is also used for your user name. The Create Username box is automatically filled with email when you get to the step to create a user name and password.

After you create your account, this same email address is also listed under My Info > Demographics > Contact Information.
Chapter 3 Get started as a new user

First Name
Specify the first name of the account holder.

Last Name
Specify the last name of the account holder.

Date of Birth
Specify the account holder's date of birth.

Zip Code
Specify the ZIP Code of the account holder.

Home Phone Number
Specify the home phone number of the account holder. This is optional.

Social Security Number
Specify the Social Security number of the account holder. This is optional.

4. Click Confirm and Continue. FollowMyHealth Universal Record Terms of Use opens.
5. Read the **Terms of Use**. Scroll down the window to ensure that you read the entire **Terms of Use** content. You can also view the FollowMyHealth® privacy policy when you click **Privacy Policy**.

6. Click **I Accept**. Your registration request is submitted and you will receive an email when your account is available.

**Sign Up and Connect** opens.
7. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window. The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name.

8. For **Password**, enter a password that meets the requirements listed on the right side of the window.

9. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

   **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth® account), the following error message is displayed: Someone already has that user name. Please try a different one. You must enter a new valid user name to proceed.

10. Click **Confirm and Continue**.

    **Request Connections to Healthcare Organizations** opens. If you do not want to request connections, click **Skip This Step**. If you click **Skip This Step**, you are asked to verify that you do not want to search for connections and the patient portal **Home** tab opens.

    **Search** is automatically filled based on the ZIP Code that you used on **Sign Up and Connect**. You can also search by organization or provider.

11. Click **Connect** adjacent to the organization that you want to connect to. The organization is listed in **My Organizations**.

    **Note:** You can add multiple connections.

12. Click **Next**.
Sign Release of Information Authorization opens.
You must accept a release for each organization that you want to connect to.

13. Click I Accept.
Connection Request Successful opens.

**Note:**
The organization that you want to connect to might require patient identification verification. If the organization requires this verification, Patient Identification Authorization opens instead of Connection Request Successful. Continue with the following steps to verify your identification.

1. Click I Agree to authorize the organization to verify your identification.
   After you agree to the authorization, the text that is displayed under the date is saved as a document and sent to your health record and displayed in the Documents tab.
   If you decline the authorization, you must confirm that you want to decline patient identification verification. If you accept the authorization, Patient Identification opens.

2. Enter the applicable information in the boxes.
Information that you provided on Sign Up and Connect is automatically filled on this window.

   > **First Name**: Specify the first name of the account holder.
   > **Last Name**: Specify the last name of the account holder.
   > **Middle Name**: Specify the middle name of the account holder. This is optional.
   > **Suffix**: Specify the suffix of the account holder. This is optional.
   > **Date of Birth**: Specify the date of birth of the account holder.
   > **Social Security Number**: Specify the Social Security number of the account holder. This is optional.
   > **Email**: Specify the email address of the account holder. This is optional.
   > **Primary Phone**: Specify the primary phone number of the account holder. This is optional. Select from Home, Mobile, Work, or None. If you select Home or Mobile, the phone number that you added on Create an account is automatically filled.
   > **Street**: Specify the street number of the account holder.
Chapter 3 Get started as a new user

> City: Specify the city of the account holder.
> County: Specify the county of the account holder.
> ZIP Code: Specify the ZIP Code of the account holder.

3. Click **OK**.
   Questions opens.
   You must answer a series of questions. After you answer a question, click **Next** to open the next question. When you have answered the last question, **Finish** is available.

4. Click **Finish**.
   Connection Request Successful opens.

14. Click **OK**.
   The patient portal opens.
   The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your FollowMyHealth® account contains only the demographics information that you provided when you created your account.

**Results of this task**
You have created a new account and connected to an organization.
View pending connections at **My Account > My Connections**.

**Create a new FollowMyHealth account and connect to another account as an authorized individual**

If a patient, such as your child, elderly parent, or other dependent, requires an authorized individual, his or her provider can send an authorized individual email invitation to you so that you can create an account and connect to the patient's health record in Allscripts FollowMyHealth® Patient Access.

**Before you begin**
The user name and password that you create are your FMH Secure Sign In credentials. Best practice is to use this specific FollowMyHealth® user name and password to sign in to your account.

The FMH Secure Sign In section is identified by the icon.
There are alternative sign in options available after you complete your account registration. If you currently use Facebook, Google, Yahoo!, or have a Microsoft® account, you can use the user
Create a new FollowMyHealth account and connect to another account as an authorized individual.

name and password associated from these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to FollowMyHealth®. Information within FollowMyHealth® is NEVER shared, posted, or exchanged with these services.

Your provider sends you an email invitation with a registration link to www.followmyhealth.com. The email invitation contains an individualized link to the FollowMyHealth® sign-in window.

1. From the email, click the Click here to become an Authorized User/Proxy link. The FollowMyHealth® sign-in window for new connections opens.

2. Click Sign Up and Connect. Sign Up and Connect opens.

Note: Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but Sign Up and Connect and Sign in and add this connection are always displayed.
3. Enter the applicable information in the boxes. Demographic information is automatically filled based on the information that your provider has recorded for you. Complete the empty boxes.

**Notifications Email**

Specify an email address where you can receive notifications regarding your health record. This email address is also used for your user name. The **Create Username** box is automatically filled with email when you get to the step to create a user name and password.
Create a new FollowMyHealth account and connect to another account as an authorized individual.

After you create your account, this same email address is also listed under My Info > Demographics > Contact Information.

First Name

Specify the first name of the account holder.

Last Name

Specify the last name of the account holder.

Date of Birth

Specify the account holder's date of birth.

Zip Code

Specify the ZIP Code of the account holder.

Home Phone Number

Specify the home phone number of the account holder. This is optional.

Social Security Number

Specify the Social Security number of the account holder. This is optional.

4. Click Confirm and Continue. FollowMyHealth Universal Record Terms of Use opens.
5. Read the Terms of Use. Scroll down the window to ensure that you read the entire Terms of Use content. You can also view the FollowMyHealth® privacy policy when you click Privacy Policy.

6. Click I Accept. Your registration request is submitted and you will receive an email when your account is available.

Sign Up and Connect opens.
7. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window. The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name. After you create your account, this email address is also listed under **My Info > Demographics > Contact Information**.

   **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message indicating the guideline that was not followed is displayed in red bold font.

8. For **Password**, enter a password that meets the requirements listed on the right side of the window.

9. For **Confirm Password**, re-enter your password to ensure that the correct password is set.

   **Note:** If you enter a user name and password that is already in use (associated with a current FollowMyHealth® account), the following error message is displayed: Someone already has that user name. Please try a different one. You must enter a new valid user name to proceed.

10. Click **Confirm and Continue**. The **Invite Wizard** starts and **Register as an authorized individual Step 1: Welcome** opens.

11. Click **Next**. **Register as an authorized individual Step 2: Enter Invite Code** opens.
Chapter 3 Get started as a new user

12. Enter the invitation code that you received when you requested authorized individual access and click Next.
The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

**Note:** If you are setting up an authorized individual account for a child or dependent adult, the code applies to that patient and is the last 4 digits of his or her Social Security number or birth year.

Register as an authorized individual Step 3: Release of Information opens.

**Note:** The Release of Information step is only presented the first time you register as an authorized individual for a patient. All subsequent authorized individual registrations are not presented with this step.

You must accept the release of information (ROI) when you initiate the first connection with FollowMyHealth®.

The ROI permits FollowMyHealth® to obtain and store the medical information for the patient that you are authorized individual for. If you decline, you are not connected to the organization, you cannot view the patient's medical information from that organization, and you cannot interact with the patient's providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth® and the ROI is expired, **Release of Information** opens. You must tap I Accept to renew the ROI and stay connected to the organization and continue to view your medical information. If you tap Decline, a confirmation window opens where you must confirm that you want to decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

13. Click I Accept to release your healthcare record.

Register as an authorized individual Step 4: Authorized Individual Acceptance opens.

14. Click I Accept.

This acceptance indicates what access is authorized for the authorized individual.

Register as an authorized individual Step 5: Upload Health Record opens and the patient's health record is uploaded to your FollowMyHealth® account.

When the application has retrieved the patient's health record, the patient portal opens.

15. Click **Hello Your Name** in the static toolbar.

A list of names is displayed.

16. Click the name of the account holder that you are an authorized individual for.

The patient's FollowMyHealth® account opens.
Results of this task
You have created a new account and connected to another account as an authorized individual.
View pending connections at My Account > My Connections.
Chapter 4

Sign in as an existing user

Sign in as an existing user with FMH Secure Sign In

You can sign in to the patient portal as an existing user after you have registered and have a user ID and password.

1. Access your provider's patient portal sign-in window in 1 of 2 ways.
   > Use the URL provided by your provider.
   > Use the default Allscripts FollowMyHealth® Patient Access URL at https://www.followmyhealth.com/patientaccess.

The FollowMyHealth® sign-in window opens.
Chapter 4 Sign in as an existing user

2. Click **Sign In**.
   The **Email or username** and **Password** boxes are displayed.
   The email address that you entered when you created an account is also listed under **My Info > Contact Information > Demographics**, as the FMH Secure Sign In user name, and for notifications.

   ![Sign In Page](image)

   **Note:** Your most recent authentication method is retained. If you sign in using an alternative method, the next time that you sign in, the alternative option is automatically displayed as the default sign-in method. If you sign in using FMH Secure Sign In, the next time that you sign in, the FMH Secure option is automatically displayed as the default sign-in method.

3. Enter your FMH Secure Sign In user name and password and click **Sign In**.
   The patient portal opens.
Sign in as an existing user with an alternative authentication method

It is best practice to use the FollowMyHealth Secure Sign In authentication method for signing in to the patient portal, but if you currently use Facebook, Google, Yahoo!, or have a Microsoft account, you can use the user name and password associated with these accounts. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to FollowMyHealth. Information within FollowMyHealth is NEVER shared, posted, or exchanged with these services.

1. Access your provider’s patient portal sign-in window in 1 of 2 ways.
   > Use the URL provided by your provider.
   > Use the default FollowMyHealth URL at https://www.followmyhealth.com/patientaccess.
   The FollowMyHealth sign-in window opens.

2. Click the or, use an alternative button.
   The icons for the alternative sign in methods are displayed.
3. Click your preferred authentication method.  
A message is displayed to inform you that you are first directed to the third party authentication window to sign in and then redirected back to FollowMyHealth®.

4. Click **OK**.  
The alternative authentication window opens.

5. Enter your user name and password and sign in.  
The patient portal opens.

\[\text{Note: Your most recent authentication method is retained. If you sign in using an alternative method, the next time that you sign in, the alternative option is automatically displayed as the default sign-in method. If you sign in using FMH Secure Sign In, the next time that you sign in, the FMH Secure option is automatically displayed as the default sign-in method.}\]
Chapter 5

Connect your existing account

If you are an existing user, you can connect your account to a new organization or connect your account to another account as an authorized individual.

Review the following scenarios and select the scenario that fits your situation. Each scenario includes step-by-step instructions to connect your existing account.

- Connect your existing FollowMyHealth® account to a different organization through an email invitation.
- Connect your existing FollowMyHealth® account to another account as an authorized individual through an email invitation.

Connect your existing FollowMyHealth account to a different organization through an email invitation

If another provider or organization has sent you an email to connect to FollowMyHealth®, but you already have an existing FollowMyHealth® account, you can connect your existing account to the new organization.

Before you begin
You must have an email invitation from the organization to join the patient portal. Your organization sends you an email invitation with a registration link to www.followmyhealth.com. The individualized link opens the FollowMyHealth® sign-in window.

This process connects your existing FollowMyHealth® account with a new organization. Information from this organization is then available in your FollowMyHealth® account.

1. From the email, click the Click here to begin registration link.
   The FollowMyHealth® sign-in window for new connections opens.
Chapter 5 Connect your existing account

**Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but Sign Up and Connect and Sign in and add this connection are always displayed.

2. Click **Sign in and add this connection**.
The organization's sign-in window opens.

3. Enter your existing FollowMyHealth® account credentials.

   **Note:** The date of birth is validated when you sign in. If the date of birth associated with the account credentials entered does not match the date of birth associated with the account that you want to connect to, **Date of Birth Does Not Match** opens. You must ensure that the data of birth matches on both accounts to prevent your health record from uploading to an account that does not belong to you.

4. Click **Confirm and Continue**.
The Invite Wizard starts and **Connect your account Step 1: Welcome** opens.
The progress bar represents the step you are on in the account connection process.

5. Click **Next**.
Connect your existing FollowMyHealth account to another account as an authorized individual

Connect your account Step 2: Enter Invite Code opens.

6. Enter the invitation code that you received in the invitation email and click Next.

   Note: The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization who invited you.

Connect your account Step 3: Release of Information opens.

The release of information (ROI) permits FollowMyHealth® to obtain and store your medical information from the organization. If you decline, you are not connected to the organization, cannot view your medical information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth® and the ROI is expired, Release of Information opens. You must click I Accept to renew the ROI and stay connected to the organization and continue to view your medical information. If you click Decline, a confirmation window opens where you must confirm that you want decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

7. Click I Accept to release your healthcare record to FollowMyHealth®.

Connect your account Step 4: Upload Health Record opens.

This screen displays the progress of retrieving data from the organization. Monitor the progress to ensure the data is uploaded successfully.

Results of this task

When the upload is complete, your account is connected to FollowMyHealth® and the patient portal opens.

Connect your existing FollowMyHealth account to another account as an authorized individual

If a patient, such as your child, elderly parent, or other dependent, requires an authorized individual, his or her organization can send an authorized individual email invitation to you so that you can connect your account with the patient's health record in FollowMyHealth®.

Before you begin

Your organization sends you an email invitation with a registration link to www.followmyhealth.com. The individualized link opens the FollowMyHealth® sign-in window.
1. From the email, click the **Click here to become an Authorized User/Proxy** link. The FollowMyHealth® sign-in window for new connections opens.

   ![FollowMyHealth sign-in window](image)

   **FollowMyHealth**

   Welcome to FollowMyHealth®, an innovative health engagement solution that empowers patients to take a more active role in managing their care.

   FollowMyHealth is used by tens of thousands of physicians as the “power” behind their hospital or clinic’s specific patient portal.

   Whether you’re looking to keep an eye on your weight, monitor your blood pressure, or manage a chronic condition, FollowMyHealth is the tool for you!

   **First time using FollowMyHealth?**
   
   **Sign Up and Connect**
   
   **Already a FollowMyHealth user?**
   
   **Sign in and add this connection**

   **Note:** Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign Up and Connect** and **Sign in and add this connection** are always displayed.

2. Click **Sign in and add this connection**.
   **Sign In and Connect** opens.

   **Note:** Each box has real-time data validation. As soon as you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a red X and a message indicating the guideline that was not followed is displayed in red bold font.

3. Enter your existing FollowMyHealth® account credentials and click **Confirm and Continue**.
   The **Invite Wizard** starts and **Register as an authorized individual Step 1: Welcome** opens.

4. Click **Next**.
   **Register as an authorized individual Step 2: Enter Invite Code** opens.
5. Enter the invitation code that you received when you requested authorized individual access and click **Next**.

   **Note:** If you are setting up an authorized individual account for a child or dependent adult, the code applies to that patient and is the last 4 digits of his or her Social Security number or birth year.

**Register as an authorized individual Step 3: Release of Information** opens.

   **Note:** The Release of Information step is only presented the first time you register as an authorized individual for a patient. All subsequent authorized individual registrations are not presented with this step.

You must accept the release of information (ROI) when you initiate the first connection with FollowMyHealth®.

The ROI permits FollowMyHealth® to obtain and store the medical information for the patient that you are authorized individual for. If you decline, you are not connected to the organization, you cannot view the patient's medical information from that organization, and you cannot interact with the patient's providers at the organization through email messages, appointment requests, and renewal requests.

The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth® and the ROI is expired, **Release of Information** opens. You must tap **I Accept** to renew the ROI and stay connected to the organization and continue to view your medical information. If you tap **Decline**, a confirmation window opens where you must confirm that you want to decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

6. Click **I Accept** to release your healthcare record.

**Register as an authorized individual Step 4: Authorized Individual Acceptance** opens.

7. Click **I Accept**.

   This acceptance indicates what access is authorized for the authorized individual.

**Register as an authorized individual Step 5: Upload Health Record** opens and the patient's health record is uploaded to your FollowMyHealth® account.

When the application has retrieved the patient's health record, the patient portal opens.

8. Click **Hello Your Name** in the static toolbar.

   A list of names is displayed.

9. Click the name of the account holder that you are an authorized individual for.

   The patient's FollowMyHealth® account opens.
Chapter 6

Static toolbar

The static toolbar is available from all FollowMyHealth® windows and tabs.

You can compose email messages, request appointments, view the signed-in user or authorized individual, access My Account, change the portal language, and search from the static toolbar.

Message

Compose a secure FollowMyHealth® message to any connected provider who has enabled messaging. This label is not displayed if you are not connected to a provider who has enabled messaging.

Request Appt

Request or directly schedule an appointment with any provider who has enabled online appointment requests. This label is not displayed if you are not connected to a provider who has enabled online appointments.

Hello

Displays who is signed in to FollowMyHealth®. You can use the list to access authorized individual accounts assigned to you.

My Account

Configure connections to providers, billing, and preferences; sign out from the application; and find Support and Help information.

Español

Click Español to change the user interface to Spanish language.
Chapter 6 Static toolbar

Search

Click the Search icon to search all tabs in FollowMyHealth®.

Search the patient portal

You can search all tabs and windows in FollowMyHealth® using the search icon located in the static toolbar.

Search features a quick list option or you can open the Search window for results.

1. From the static toolbar, click .
   A quick list is returned for results or you can click See more results.

2. Click See more results.
   Search opens.
The search results are organized in a tabs.

3. From Description, click the result description to open details about the item. If the item is a clinical item, an edit window opens where you can edit the item.

**My Account**

You can manage account connections, billing, and preferences from **My Account** on the static toolbar.

You can also access support and help, and sign out of the patient portal from **My Account**.

**Manage My Connections**

You can manage connections to organizations, providers, authorized individuals, and devices and applications.

1. From the static toolbar, click **My Account > My Connections**. **My Connections** opens.
Connections are divided into categories, including connections with clinicians and organizations, connections with applications and devices through **Health Sources**, and connections with family members and dependents.

**My Connections**

<table>
<thead>
<tr>
<th>With Providers and Healthcare Organizations (3 Organizations, 1 Provider)</th>
</tr>
</thead>
</table>
| **FMH-QA-TW1**  
North Carolina 27513  
(Connected) |
| **SRT PRO 14.0**  
8225 Six Forks Rd  
Raleigh, North Carolina 27615  
(Pending) |

**What do you want to do?**
- Schedule an Appointment
- Remove a Prescription
- Request an eVisit
- Request a Referral
- Send a Message
- Send Profile to a Friend

**Show More**
- Affiliated Practice: FMH-QA-TW1
- Credentials: Medical Doctor
- Specialties: Family Medicine
- Place of Service: FMH-QA-TW1
- Contact Info: North Carolina 27513

**Add Organization**
2. Click **Visualize Connections** to view the details about each connection. **Visualize My Connections** opens.
Your healthcare organizations, as known by FollowMyHealth®, are displayed in an interactive graph on Visualize Connections. You are represented by your picture in the center of the graph. The healthcare organizations that you are connected to, authorized individual (proxy connections) representation, and clinical settings starburst from your photo.

Click the various icons in the graph, such as Proxies for Me, Hospitals, Schools, Health Sources, Clinics, and so on, to open Connection Details for the respective connection type.

Click Re-Center Graph to go back to the center of the graph.

3. To remove a connection, click the organization on the interactive graph. The organization details is displayed in Connection Details.

4. Click the icon to remove the organization connection. A confirmation message is displayed.

5. Click Yes to delete the connection.
Add a connection to an organization

You can add a connection to an organization from **My Account > My Connections**.

1. From the static toolbar, click **My Account > My Connections**. 
   **My Connections** opens.
2. Click **Add Organization**. 
   **Organization Search** opens.
3. For **Search**, enter your ZIP Code, organization, or provider. 
   Search results are displayed in **Organization Search**.
4. To narrow the search results, for **Distance in Miles**, enter the number of miles from the ZIP Code that you want to search, or select the type of organization from **Organization Type**.
5. Select an organization from the search results.
6. Click **Connect**. 
   **Release of Information Authorization** opens.
7. Click **Accept**. 
   The organization that you want to connect to might require patient identification verification. 
   If the organization requires this verification, **Patient Identification Authorization** opens. If your new connection does not require this verification, **Connection Request Successful** opens.
8. Click **I Agree** to authorize the organization to verify your identification. 
   After you agree to the authorization, the text that is displayed under the date is saved as a document and sent to your health record and displayed in the **Documents** tab. 
   If you decline the authorization, you must confirm that you want to decline patient identification verification. 
   **Demographics** opens.
9. Enter the applicable information in the boxes. 
   Information from **My Info** in your health record is automatically filled on this window.

**First Name**

Enter the first name of the account holder.

**Middle Name**

Enter the middle name of the account holder. This is optional.
Chapter 6 Static toolbar

Last Name

Enter the last name of the account holder.

Suffix

Enter the suffix of the account holder. This is optional.

Date of Birth

Enter the date of birth of the account holder.

Social Security Number

Enter the Social Security number of the account holder. This is optional.

Email

Enter the email address of the account holder. This is optional.

Primary Phone

Enter the primary phone number of the account holder. This is optional. Select from Home, Cell, Work, or None. If you select Home or Cell, the phone number that is listed on My Info is automatically filled.

Street

Enter the street number of the account holder.

City

Enter the city of the account holder.

State

Enter the state of the account holder.

Zip Code

Enter the ZIP Code of the account holder.

10. Click OK. Questions opens.
You must answer a series of questions. After you answer a question, click **Next** to open the next question. When you have answered the last question, **Finish** is displayed.

11. **Click Finish.**
   **Connection Request Successful** opens.

12. **Click OK.**

**Results of this task**

The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your FollowMyHealth® account contains only the demographics information that you provided when you created your account.

**Edit organization clinic settings**

You can manage connections to organizations and clinic settings associated with the organization.

1. From the static toolbar, click **My Account > My Connections.**
   **My Connections** opens.

2. **Click With Providers and Healthcare Organizations.**
   A list of connections and pending connections are displayed in the tab.

3. **Click the organization name that you want to edit.**
   **Edit Organization Settings** opens.

   Turn on and off clinic settings that you want to include in your connection by clicking 🌃.

   **Attention:** Your organization has the option to turn on or off a preference that enables your provider from displaying in **With Providers and Healthcare Organizations.** However, you are still able to send the clinician messages and schedule appointments if those services are enabled for the clinician.

4. **Click Close.**

**View providers**

Providers that you have a connection with are displayed in **My Connections** if the organization enables the provider names to display.

Your organization might choose not to display the provider names. In this scenario, you can view only the organizations that you have a connection to.
Chapter 6 Static toolbar

1. From the static toolbar, click **My Account > My Connections**. **My Connections** opens.

2. Click **With Providers and Healthcare Organizations**. Your organization connections are displayed. If the organization has configured the patient portal to display provider names and information, the providers also display.

3. Click **What do you want to do?** to view the tasks that can do from the provider details. Select from the following tasks:
   - Schedule an Appointment
   - Renew a Prescription
   - Request a Consultation
   - Request a Referral
   - Send a Message
   - Send Profile to a Friend

   **Note:** The tasks available depend on the preferences that your provider has enabled. Providers can turn on or off preferences that enable you to send messages, schedule appointments, renew prescriptions, and so on.

4. Click **Additional Providers** to see all other providers that are associated with an organization. The **Additional Providers** link always displays if there are additional providers for the organization that the you are not associated with, but the providers are accepting appointment requests from new patients.

### Send a provider profile

You can share a provider profile with family and friends from the **With Providers and Healthcare Organizations** tab.

1. From the static toolbar, click **My Account > My Connections**. **My Connections** opens.

2. Click the **With Providers and Healthcare Organizations** tab.

3. From **What do you want to do?**, select **Send Profile to a Friend**. **Share Provider Profile** opens.

4. Enter the email address of the person that you want to send the profile to, a subject, and message.

5. Click **Send**.
Add an authorized individual

You can invite another person to access your FollowMyHealth® account by using the Add Authorized Individual process from the patient portal.

If you want to be an authorized individual for another patient, he or she must invite you from his or her own patient portal account, or the healthcare organization must send you an authorized individual invitation email on behalf of that patient. To request authorized individual access to a minor, contact your child's healthcare organization.

1. From the static toolbar, click My Account > My Connections. My Connections opens.
2. Click With Family Members, Dependents, etc.. With Family Members, Dependents, etc. is displayed.
3. Click Add Authorized Individual. Add Authorized Individual opens.
4. Enter information for First Name, Last Name, Relationship to You, Email Address, Invitation Code, and select an access level.
   If you want the authorized individual to have full access to your FollowMyHealth® account, including view your information, enter new data, delete data, or send secure messages to your providers on your behalf, click Full Access Proxy. If you want the authorized individual to be able to only view your account, click Read Only Proxy.

   Important: The security code is required for your authorized individual to accept the invitation. Make sure to remember the security code so that you can provide it for the person you are inviting.

5. Click Send Invite. Invitation Confirmation opens where you can confirm that you want to send an authorized individual invitation.
6. Click OK to send the authorized individual invitation.

Manage billing

You can manage billing for multiple providers, including paying invoices, viewing pending insurance submissions, and viewing paid invoices.

The following sections are available in Billing.

> Ask A Billing Question
Chapter 6 Static toolbar

If your provider supports billing questions, Ask a Billing Question is displayed.

> **Patient Responsibility**
  Displays the invoices that you owe the organization. The list format includes date of service, invoice number, provider, procedures, charges, and amount due.

> **Pending with Insurance**
  Displays the invoices that have been submitted to insurance.

> **Paid Invoices**
  Displays invoices that have been paid in full.

**Billing questions**

If your provider supports billing questions, Ask a Billing Question is available from Billing.

Billing questions can also be sent when you compose an email from your Inbox. The Is this a billing question check box is displayed on Compose Email to indicate the email message is a billing question.

**Ask a billing question from Billing**

If your provider supports billing questions, Ask a Billing Question is available from Billing.

3. From To, select a provider to send the question to.
4. For Subject, enter the purpose for your email.
5. For Body, enter the billing question.
6. Click Send.
   A confirmation window is displayed indicating that your email is sent.

**Ask a billing question from Compose Email**

If your provider supports billing questions, the Is this a billing question check box is available when you compose an email.

1. From the Home tab, click Inbox > Compose. Compose Email opens.
2. From To, select a provider to send the question to. 

   **Note:** The **Is this a billing question** check box is displayed after you select the provider, only if the provider that you select supports billing questions.

3. For **Subject**, enter the purpose for your email.
4. For **Body**, enter the billing question.
5. Select the **Is this a billing question** check box.
6. Click **Send**.
   A confirmation window is displayed indicating that your email is sent.
Chapter 6 Static toolbar

Pay your bill
If your provider supports billing payments, Pay My Bill is available from Billing.

You can also click Pay from the Billing section on the Home tab to access Billing.

Pay your bill from Billing
If your provider supports billing payments, Pay My Bill is available from Billing.

1. From the static toolbar, click My Account > Billing.

   Note: If you are connected to a provider that does not support billing, a message is displayed, Billing is not currently supported by any of your connected organizations, and the window is blank.

   Billing opens.

2. If you are connected to more than 1 organization, select an organization from Organization.

3. To pay an invoice in Patient Responsibility, you can either select Pay All Invoices to pay all of the outstanding invoices listed or select a single invoice from the list. The invoice amount is displayed in the Pay Now box.

   You can also enter a partial payment amount for an invoice in the Pay Now box.

4. Click Pay Now.

   The organization’s web page opens. Enter the required information and click Process Transaction.

   A confirmation receipt window opens if the transaction is successful and an email is sent to your patient portal Inbox.

5. To view the invoices that are pending insurance processing, click the Pending With Insurance section.

   Pending With Insurance opens. Invoices listed in Pending With Insurance have been sent to your insurance company for payment. These invoices are not your responsibility for payment at this time.

6. To view a history of paid invoices, click the Paid Invoices section.

   Paid Invoices opens with a list of invoices that have a 0 (zero) balance.
Pay your bill from the Home tab

If your provider supports billing payments, **Pay My Bill** is available in the **Billing** section on the **Home** tab.

1. From the **Billing** section on the **Home** tab, click **Pay My Bill**.

   **Note:** If you are connected to a provider that does not support billing, a message is displayed, billing is not currently supported by any of your connected organizations, and the window is blank.

   **Billing** opens.

2. If you are connected to more than 1 organization, select an organization from **Organization**.

3. To pay an invoice in **Patient Responsibility**, you can either select **Pay All Invoices** to pay all of the outstanding invoices listed or select a single invoice from the list.

   The invoice amount is displayed in the **Pay Now** box.

   You can also enter a partial payment amount for an invoice in the **Pay Now** box.

4. Click **Pay Now**.

   The organization's web page opens. Enter the required information and click **Process Transaction**.

   A confirmation receipt window opens if the transaction is successful and an email is sent to your patient portal Inbox.

5. To view the invoices that are pending insurance processing, click the **Pending With Insurance** section.

   **Pending With Insurance** opens. Invoices listed in **Pending With Insurance** have been sent to your insurance company for payment. These invoices are not your responsibility for payment at this time.

6. To view a history of paid invoices, click the **Paid Invoices** section.

   **Paid Invoices** opens with a list of invoices that have a 0 (zero) balance.

Manage account preferences

Preferences control several processes in the patient portal such as authorized individual, sign-in methods, account notifications, news alerts, and restoring deleted items.

There are 6 sections in **Preferences**.

> **Account Preferences**
Manage your health record accounts, proxy accounts, and delete accounts.

> **Sign In Preferences**  
Manage your sign-in methods, such as FMH Secure Sign In.

> **Notification Preferences**  
Manage how you want to be notified about new information to your health record.

> **Restore Deleted Items**  
View and restore items that you have deleted from your health record account.

> **Activity History Log**  
View the recent activity for your health record account. The log includes these actions: view, downloaded, and transmitted, accessed, printed, emailed, and faxed.

> **Display Preferences**  
Manage the visual display settings in your FollowMyHealth® account.

1. From the static toolbar, click **My Account > Preferences**.  
   **Preferences** opens.
2. Click the preference tab that you want to work with.  
The tab that you selected is displayed.

### Manage sign-in methods

#### Add an alternative sign-in account

When you create a new FollowMyHealth® account, you must create a FMH Secure Sign In user name and password. Best practice is to use this specific user name and password, but there are alternative sign-in options available after you complete your account registration.

If you currently use Facebook, Google, Yahoo!, or have a Microsoft® account, you can use the user name and password associated with these accounts to sign in to the patient portal. This is offered as a convenience to eliminate the need to remember new credentials and is only used to sign in to the patient portal. Information within FollowMyHealth® is NEVER shared, posted, or exchanged with these services.

You can add or disconnect sign-in methods using **Sign In Preferences**. You must have 1 active sign-in method at all times; you cannot disconnect a sign-in method if it is your only enabled method.

**Note:** FMH Secure Sign In credentials are required. You can edit FMH Secure Sign In credentials from this window, but you cannot remove your FMH Secure credentials.
1. From the static toolbar, click **My Account > Preferences.**
   *Preferences* opens.

2. Click the **Sign In Preferences** tab.
   The **Sign In Preferences** tab is displayed.

3. Click **Add** next to the authentication method that you want to add.
   The sign-in window opens for the authentication method.

4. Enter your user name and password for the authentication method.
   **Remove** changes to **Add** next to the authentication method in **Sign In Preferences.**

**Results of this task**
You have added an authentication method. The next time you sign in to the patient portal, click the authentication method icon that you want to sign in with.

**Manage your FMH Secure Sign In account preferences**
Manage FMH Secure Sign In preferences, update your notification email address, update your password, and turn on the 2-Step Verification feature from the **Sign In Preferences** tab.

**Edit FMH Secure Sign In notification email address**
You can change the email address that is used for your FMH Secure Sign In notifications from the **Sign In Preferences** tab.

The email address that is listed in your FMH Secure Sign In preferences is also listed in the **Demographics** tab, the **Notification Preferences** tab, and the **Goals** tab. If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address in the **Demographics** tab, the change is also made to the email address that is listed in these other locations. The **Goals** tab is only displayed if your provider has the goals feature turned on.

**Note:** The notification email can be the same email that is used as your FMH Secure Sign In user name, but you cannot change the email that is used as your user name.

1. From the static toolbar, click **My Account > Preferences.**
   *Preferences* opens.

2. Click the **Sign In Preferences** tab.
   The **Sign In Preferences** tab is displayed.

3. Click **Preferences** next to the FMH Secure Sign In icon.
   **Manage Your FMH Secure Sign In Account** opens.
Chapter 6 Static toolbar

4. From Secure Sign In Notifications, enter the password in Email that you want to use for your notifications.
5. Confirm your new password by entering the password in Confirm new password.
6. Click Change Email.

Results of this task
You have changed your FMH Secure Sign In notifications email address.

Edit FMH Secure Sign In password
You can edit your FMH Secure Sign In account password from the Sign In Preferences tab.

1. From the static toolbar, click My Account > Preferences. Preferences opens.
2. Click the Sign In Preferences tab. The Sign In Preferences tab is displayed.
3. Click Preferences next to the FMH Secure Sign In icon. Manage Your FMH Secure Sign In Account opens.
4. Enter your current password in Current password and enter a new password in New password.
5. Confirm your new password by entering the password in Confirm new password.
6. Click Save.

Results of this task
You have changed your FMH Secure Sign In password.

2-Step Verification
After you create your patient portal account with a FMH Secure Sign In credentials, you can add another layer of security verification for your account.

The 2-Step Verification method works by providing a new numeric PIN each time that you sign in with your FMH Secure Sign In credentials.

The PIN is sent to your communication method of choice. You can use the email address that is used for FMH Secure Sign In notifications, Short Message Service (SMS) text, or a Quick Response (QR)-Code reader that is added to your phone or tablet.

After you sign in to the patient portal, the 2-Step Verification sign-in window opens and you receive the PIN in your communication method of choice. Use the PIN to sign in.

Add 2-Step Verification
2-Step Verification can be used with your FMH Secure Sign In account. You can add this extra layer of security after you have created your patient portal account and have FMH Secure Sign In credentials.

1. From the patient portal static toolbar, click My Account > Preferences. Preferences opens.
2. Click the Sign In Preferences tab. The Sign In Preferences tab is displayed.
3. Click FMH Secure Sign In Preferences. Manage Your FMH Secure Sign In Account opens.
4. Scroll down to 2-Step Verification Preferences.
5. Select the communication method that you want to use to receive the PIN code.

**Email**

Select Email to receive the verification code through your email account. When you select Email, the email address associated with your FMH Secure Sign In account is automatically filled in the Email box under Secure Sign In Notifications. Enter your email address in the Confirm Email box to confirm and click Save.

**SMS**

Select SMS to receive the verification code through a Short Message Service (SMS) text message on your cellular phone. Enter your phone number in Mobile Phone, select your mobile carrier from Mobile Carrier, and click Save.

**App**

Select App to receive the verification code through the authenticator application on your smart phone. Scan the Quick Response (QR) barcode provided on the window and click Save. If you select the authenticator application method, make sure that the application is already installed on your smart phone and available to use before finishing the registration process.

**Results of this task**

The 2-Step Verification sign-in window opens when you use FMH Secure Sign In credentials.

**Turn off 2-Step Verification method**

You can turn off the 2-Step Verification feature in the patient portal.

1. From the patient portal status toolbar, click My Account > Preferences. Preferences opens.
2. Click the Sign In Preferences tab.
Chapter 6 Static toolbar

The Sign In Preferences tab is displayed.

3. Click FMH Secure Sign In Preferences. Manage Your FMH Secure Sign In Account opens.

4. Scroll down to 2-Step Verification Preferences.

5. From the communication method drop-down menu, click None.

6. Click Save.

Results of this task
The 2-Step Verification feature is turned off.

Set notification preferences

There are several ways for you to be alerted by FollowMyHealth® when a provider or organization has a notification for you. Notifications include My Reminders, Goal Alerts, Check In Reminders, Appointment Reminders, Appointment Updates, Updates to Health RecordOrganization Bulletins, and Notice Communication from Provider.

You can also change a cell phone number and email address from the Notification Preferences tab in Preferences.

1. From the static toolbar, click My Account > Preferences. Preferences opens.

2. Click the Notification Preferences tab.
   The Notification Preferences tab is displayed.

3. Go through each notification type section and select Email or Text Message to configure how you want to receive notifications.
   The notification email default is the email address used for the patient's invitation and all notification preferences default to email.

Appointment Reminders

Specifies how the organization that you are connected to can send appointment reminders. You can receive an email in your external email account or a text message notifying you when an appointment reminder has been added to your FollowMyHealth® Inbox.

Appointment Updates

Specifies how the organization that you are connected to might send appointment updates. You can receive an email in your external email account or a text message notifying you when an appointment update has been added to your FollowMyHealth® Inbox.
Updates to Health Record

Specifies how the organization that you are connected to can send health record updates when a new item is added to the My Health tab in FollowMyHealth®. You can receive an email in your external email account or a text message notifying you when health record updates are added to My Health.

Notice of Communication from Provider

Specifies how you can receive an email in your external email account or a text message notifying you when a secure message is added to your FollowMyHealth® Inbox from your provider.

Organization Bulletins

Specifies how the organization you are connected to can send general news bulletins, for example, sharing holiday hours or notifying you of a flu shot clinic. You can receive an email in your external email account or a text message notifying you when a bulletin has been added to your FollowMyHealth® Inbox.

My Reminders

Specifies how you will receive reminders. My Reminders are automatically created for new goals and can be configured for anything that you want to use them for. My Reminders are only displayed if your provider has enabled the goals feature.

Goal Alerts

Specifies how the organization that you are connected to can send goal alerts: through email or text message. You automatically receive goal alerts in Action Center if your reading violates 1 or more rules set by your provider. Goal Alerts are only displayed if your provider has enabled the goals feature.

Check In Reminders

Specifies how the organization that you are connected to can send appointment check-in reminders. You can receive an email in your external email account or a text message notifying you when a check-in reminder has been added to your FollowMyHealth® Inbox.

If you select to receive notifications through text message, Release of Information Disclaimer opens. If you agree to receive personal information through a text message, click Yes. If you do not want to receive personal information through a text message, click No.
Chapter 6 Static toolbar

Change your cell phone number

FollowMyHealth® sends you notifications through an external email address or cell phone. The cell phone number that you added when you registered for a FollowMyHealth® account is displayed in the Notification Preferences tab, the Demographics window in My Info, and the Goals tab in My Health. You can change a cell phone number from either of these locations.

**Note:** The Goals tab is not displayed in My Health unless your provider has the goals feature enabled and you have accepted a goal.

1. From the static toolbar, click My Account > Preferences > Notification Preferences. The Notification Preferences tab is displayed.
2. Click Change. Cell Phone Number opens.
3. For Cell Phone, enter the cell phone number that you want to use for notifications.
4. From Cell Phone Carrier, select the cell phone carrier that you use for cell phone service.
5. Click Verify Cell Phone. FollowMyHealth® sends you a validation code text message to your cell phone.
6. For Validation Code, enter the validation code that you received through text message.
7. Click Verify Cell Phone. The cell phone number is displayed for Cell Phone.

**Results of this task**

You added your cell phone number to My Account > Preferences > Notification Preferences. You also updated the cell phone number at My Info > Demographics and on the Goals tab.

Change your email address

Notifications are sent to you through an external email address or cell phone. The email address that you added when you registered for a FollowMyHealth® account is displayed in the Notification Preferences tab, the Demographics window in My Info, your FMH Secure Sign In preferences, and the Goals tab in My Health.

If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address in Demographics, the change is also made to the email address that is listed under these other locations.

**Note:** The Goals tab is not displayed in My Health unless your provider has the goals feature enabled and you have accepted a goal.
1. From the static toolbar, click My Account > Preferences > Notification Preferences. The Notification Preferences tab is displayed.

2. Click Change next to your current email address. Email address opens.

3. For Email Address, enter the new email address.

4. For Confirm Email Address, enter the email address again.

5. Click Verify Email. A verification email is sent to the email address that you entered.

   **Note:** If you did not receive the email, check your junk mail folder, ensure the email was entered correctly, and ensure that it is a valid email address. If you entered the email address incorrectly, repeat steps 2-5.

6. Sign in to your email account and open the verification email from FollowMyHealth®.

7. Click Click here to verify your email address with FollowMyHealth. FollowMyHealth® Sign In opens.

8. Sign in to FollowMyHealth®. FollowMyHealth® opens and a window is displayed that confirms your email address is verified.

9. Click OK.

**Results of this task**
Your email address in My Account > Preferences > Notification Preferences is changed. Your email address is also updated in Demographics, FMH Secure Sign In preferences, and on the Goals tab.

**Set display preferences**
You can change the way the patient portal interface is displayed, make alternative text available for images, change units of measure, and enable disclaimers on messages.

1. From the static toolbar, click My Account > Preferences. Preferences opens.

2. Click the Display Preferences tab. The Display Preferences tab is displayed.

3. Change your preferences.
Accessibility Preferences

Select **Display images of text** to control how the low, medium, and high graphic displays on the **Results** tab in **My Health**.
Select **Display high-contrast theme** to change the color of the user interface to a high contrast resolution for the visually impaired.

Units

Select the type of unit of measure that you want your vital signs to display in: English or Metric. The default units that are displayed are dependent on the country domain that you used to sign in to the patient portal.

| Note: | Head circumference measurements always display in Metric.

Select the units for the following measurements.

**Weight**

- **Pounds** or **Kilograms**

**Height**

- **Feet and inches** or **Centimeters**

**Temperature**

- **Fahrenheit** or **Celsius**

Other Preferences

Select **Display message disclaimer** to open a disclaimer with each email message that you compose. If this preference is selected, **Emergency Message Disclaimer** opens each time you compose an email message.

4. Close **Preferences**.

Delete your universal health record account

| Important: | This action permanently deletes your FollowMyHealth® account and you no longer have access to your online healthcare record or providers. You cannot recover the deleted data. |
1. From the static toolbar, click My Account > Preferences. Preferences opens.

2. Click the Account Preferences tab. The Account Preferences tab is displayed.

3. Click Delete your UHR. A warning message window opens to confirm that you want to delete your account.

4. Click OK to permanently delete your FollowMyHealth® account.

**Restore deleted information**

If you delete information or providers from your FollowMyHealth® account, you can recover the deleted items from Restore Deleted Items in Preferences.

**Note:** You cannot restore your account and data if you deleted your entire universal health record (UHR) as described in Delete your universal health record account. You can only use Restore Deleted Items to restore specific data or providers.

1. From the static toolbar, click My Account > Preferences. Preferences opens.

2. Click the Restore Deleted Items tab. The Restore Deleted Items tab is displayed.

3. Click Restore to add deleted items back to your FollowMyHealth® account. The previously deleted item is removed from the list and can be found in the corresponding clinical data tab in My Health.

**Results of this task**
The deleted item is restored.

**View activity history**

Activity History Log in Preferences lists all of the activity in your FollowMyHealth® account.

1. From the static toolbar, click My Account > Preferences. Preferences opens.

2. Click the tab. The Activity History Log tab is displayed.

3. Click Previous or Next to page through the Activity History Log.
Get technical support and assistance

FollowMyHealth® provides several ways to get technical assistance if you have issues working with the application or want to learn more.

1. From the static toolbar, click My Account > Support. Support Information opens with links to several types of assistance.

2. To access Knowledge Base, click My Account > Help. Knowledge Base opens.

3. To access the Allscripts FollowMyHealth® video walkthrough or user manual from Preferences, click My Account > Preferences. Preferences opens. The Video Walkthrough and User Manual links are displayed in the upper right.

Support information

Knowledge Base

This library provides articles about getting started with the product, frequently asked questions, security, problems and issues, using the product with mobile devices, and miscellaneous resources.

Product Feedback and Suggestions

This web page provides a forum where you can submit questions, feedback, and suggestions, and get replies from a technical support representative.

FollowMyHealth Video Walkthrough

This video tutorial provides a demonstration of the product. The video opens in English or Spanish, depending on the mode set on the FollowMyHealth® static toolbar. If you switch to Español mode during the invitation acceptance process, the video automatically opens in Spanish. The video is also directly available on YouTube™ video community at https://www.youtube.com/watch?v=TT7C3qASMIU for English or http://www.youtube.com/watch?v=SpypsjSy0rs for Spanish.

Note: The features available to you are determined by your connected healthcare organizations. The video tutorial might cover options that are not currently available to you.
User Manual

The Allscripts FollowMyHealth® Universal Health Record Patient Access User Guide is accessible from this link.
Chapter 6 Static toolbar
Chapter 7

The Home tab

The Home tab is the first tab to display after you sign in. You can compose a message, view your health summary, manage activities, appointments, billing, and applications from the Home tab.

Health Summary

The Health Summary section on the Home tab includes basic information about you, including age, gender, height, weight, body mass index (BMI), blood pressure, and primary insurance.

The information under Health Summary is pulled from the clinical item tabs in My Health.

Action Center

The Action Center section on the Home tab notifies you of items that require your attention. You can view an Action Center list or a calendar view.

Action items for patients that you are an authorized individual for are also listed on Action Center under the patient's name.

You can select any item from the Action Center list to expand the detailed section in the patient portal. For example, select a clinical item from Updated Clinical Items and the clinical item opens as if you are in My Health. You can view the details from this window and print, fax, or email.

You can also launch InfoButton™ education without navigating to My Health or Know My Health.
The calendar view contains thumb tack icons to indicate appointments or events are scheduled. You can print, email, and export from the calendar view.

When you export your calendar view, the scheduled appointments are displayed in the calendar program on your desktop, such as Microsoft® Outlook.
Recent Activity

The **Recent Activity** section on the **Home** tab shows the most recent activity in your patient portal account.

To remove items from **Recent Activity**, click the delete icon \(\times\) next to the item.
Chapter 7 The Home tab

Appointments

You can view, request, schedule, reschedule and cancel appointments from the Appointments section on the Home tab. If your provider's health organization has enabled Allscripts FollowMyHealth® Check In, you can also remotely check-in to your appointments from the patient portal.

The Appointments section contains 3 tabs.

Upcoming

This tab includes all future appointments that you have scheduled. You can view, reschedule, and cancel appointments from the Upcoming tab. The Check In button is displayed in the Upcoming tab if your provider's organization supports remote check-in.

Past

This tab includes all past appointments.
Other

This tab includes all other appointments, such as cancelled appointments or appointments that you did not show up for.

Search enables you to search the current tab by organization name or provider name. Click Export to export the appointments in a .ics file to your calendar.

Check-in for your appointment

You can remotely check-in for your appointment from the Appointments section on the patient portal Home tab if your provider’s organization supports remote check-in.

Before you begin

Healthcare organizations have the option to send you a Check In Reminder message through your communication method of choice: text, email, or FMH Message.

The Check In button is displayed next to the appointment in the Upcoming tab. Your provider’s healthcare organization determines the number of days before the appointment that you can check in. The Check In button is not displayed until the scheduled check-in date. For example, if your provider sets the check-in date to 2 days, the Check In button is displayed starting 2 days before your appointment date.

1. Sign in to the patient portal. The Home tab is displayed.
2. Locate the appointment in the Upcoming tab and click Check In. Check In - Consent Form opens.
   Note: The consent form step only opens the first time you use the check-in feature or when the consent form is expired. Your organization sets the expiration date for the consent form.
3. Complete the consent form if this your first time using remote check-in or if your consent form is expired.
   If this appointment is for you, Patient is automatically selected. If you are an authorized individual and are checking in for a dependent, Parent/Guardian/Other Legal Representative is selected.
4. Select eSignature consent.
5. Select the signature type that you want to use.
   > Type Signature
   Use the keyboard to enter your signature in the box.
Chapter 7 The Home tab

> **Draw Signature**
Hold down the left mouse button as you write your signature in the box.

6. **Click Accept.**
**Check In - Verify Demographics** opens.

7. **Verify your basic, social, insurance policy, and responsible party information.**
If you edit this information during check-in, a message is displayed to confirm that you want to send the changes to other connected organizations. Click **Yes** or **No**.

This information matches the information listed under **My Info > Demographics**, with the exception of the insurance information, which may or may not match the information in your patient portal account.

If you edit the information, changes are also made in **My Info > Demographics** and vice versa.

**Note:** If you update the insurance information, you cannot make your co-payment during check-in. The **Go to Payment Page** button is not available. You can continue to click the **Pay at Front Desk** button.

8. **Click Next.**
**Check In - Co-Payment** opens.

9. **Pay your co-payment.**
   > **Click Go to Payment Page.**
   The payment window opens. Enter your credit card information and click **Pay Now**.
   > **Click Pay at Front Desk.**
   **Check In - Summary** opens and check in is complete.

**Results of this task**
You have checked in for your appointment.

A confirmation email message is sent to your patient portal Inbox. If you signed the consent form, a copy is added to the **Documents** tab in **My Health**. If you submitted a co-payment, your payment is complete.

**Request an appointment**
You can request an appointment with a provider from the **Appointments** section on the **Home** tab.

1. **From the Appointments section, click Request.**
**Note:** You must have a relationship with at least 1 provider who has enabled online appointment requests. Otherwise, **Request** is unavailable.

**Schedule an Appointment** opens.

2. From **Appointment With**, select the provider, organization, and the appointment type, **Other**. If you select an appointment type other than **Other**, your appointment is directly scheduled with the provider if the provider has direct scheduling enabled.
Chapter 7 The Home tab

If the provider has direct scheduling enabled, all direct appointment types are listed with the Other appointment type listed at the bottom. Other is the new description for "request an appointment". When you select a direct appointment type, the direct scheduling appointment flow is started. If you select Other, the appointment request flow is started. If the provider does not have direct scheduling enabled, the Other appointment type is the only appointment type that is available in the appointment type menu.

3. Enter the reason for the appointment in Reason For Appointment. Provide a short description of your health issue and reason for the visit. You are limited to 250 characters.

4. From My Available Times, select the check box preceding the day of week that you want the appointment.

5. Select a time and availability. You can select a date up to 1 year in advance, when requesting a non-direct appointment.

6. Click Add This Time Slot for each appointment day and time selection. The appointment choices are listed in the box. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon next to the list item.

7. (Optional) Enter additional comments in Comments. You are limited to 250 characters.

8. Click Submit. A message is displayed to remind you that the requested appointment is not scheduled until the appointment is posted in your health record and the provider sends a confirmation email.

9. Click OK.

Results of this task
A secure message appointment request is sent to the provider that you specified.
Directly schedule an appointment

Your provider might allow direct scheduling. This means that you can view your provider's availability and directly schedule an available appointment.

Before you begin

Your provider and organization must have direct scheduling enabled for you to directly schedule appointments. If direct scheduling is enabled, patient portal displays a message to search the provider's calendar and select a specific appointment time.

You can determine that your provider or organization has direct scheduling enabled if there are appointment types listed in the Appointment Type drop-down list other than Other. If there are not appointment types listed other than Other, direct scheduling is not enabled.

1. Use 1 of following methods to directly request an appointment.
   > From the Home tab, click Request from the Appointments section.
   > From the static toolbar, click Schedule an Appointment.

   Note: Your healthcare record must be connected to at least 1 provider that has enabled online appointment requests. Otherwise, Request is unavailable.

   Schedule an Appointment opens.
2. Click **Select an Organization** to select a healthcare organization.

   **Note:** You must select an organization first. After you select an organization, **Provider** is available and you can select the provider that you want the appointment with. After you select a provider, **Appointment Type** is available.

3. Click **Select a Provider** to select the provider that you want an appointment with.

4. Click **Select Appointment Type** and select an appointment type other than **Other** so that you are directly scheduling an appointment.
5. Enter the reason for the appointment in **Reason For Appointment**. Provide a short description of your health issue and reason for the visit. You are limited to 250 characters.

6. From **View Appointments After**, select the starting day on the calendar that you want to find appointments and click **Search**. For example, if you select February 7, all available appointments on February 7 and after are displayed in **Appointments Available**. If no appointments are available on February 7, a red flag indicates the search results items that are different dates.

7. Select the appointment that you want or click **View More** to see more appointment options.

8. From **Schedule An Appointment**, click **Submit**. A message is displayed to confirm that you scheduled an appointment.

9. Click **OK**. A message is displayed to confirm that your appointment is successfully reserved.

**Results of this task**
You have reserved an appointment with your provider. The appointment takes a few minutes to post to your health record.

**Important**: If another patient simultaneously reserves an appointment for this time slot, you are notified that the time slot is no longer available, and you must select a new appointment time.
View upcoming appointments

Future appointments are listed in the Upcoming tab located in the Appointments section.

Your next 2 appointments are automatically listed. If you want to view an appointment that is scheduled for a later date, click View More.

1. To view appointment details, click the appointment in the list. Appointment Information opens.
The appointment information, such as date, time, and location, are displayed at the top of the tab, along with a provider photo, if available.

A map and written directions are available if the appointment location is known. The directions are from your home address as known by the patient portal to the appointment location.

2. (Optional) To change the start or end address for directions, enter the new addresses in **Start** and **End** and click **Get Directions**.
   You can automatically add the addresses by selecting **Use My Address** and **Use Appointment Address**.
Chapter 7 The Home tab

A new map and directions are displayed.

3. (Optional) To print the map and directions, select **Directions** and **Map**, and click **Print**.

**Results of this task**
You have viewed appointment details and printed a map and directions to the appointment location.

**Reschedule an appointment**

You can reschedule appointments on the **Upcoming** tab located in the **Appointments** section on the **Home** tab.

1. Select an appointment from the **Upcoming** tab. 
   **Appointment Information** opens.

2. Click the **Reschedule Appointment** tab.
   The **Reschedule Appointment** tab is displayed.

   The organization and provider are automatically displayed based on the original appointment and cannot be changed. The reschedule appointment workflow is identical to the request appointment workflow.

   A secure message is sent to your provider requesting to reschedule the appointment. It might take a day for the appointment to be removed from the **Upcoming** tab. A **Pending Reschedule** label is displayed with the appointment on the **Upcoming** tab until the appointment is confirmed.

**Cancel an appointment**

Cancel appointments in the **Upcoming** tab located in the **Appointments** section on the **Home** tab.

1. Select an appointment from the **Upcoming** tab. 
   **Appointment Information** opens.

2. Click the **Cancel Appointment** tab.
   The **Cancel Appointment** tab is displayed.

3. Enter a reason in the comments box to explain why you want to cancel the appointment and click **Submit**.
   A **Pending Cancellation** label is displayed with the appointment on the **Upcoming** tab until the appointment is cancelled.
View past and other appointments

Past and other appointments are listed in the Past and Other tabs, located in the Appointments section on the Home tab.

1. Click the Past tab or Other tab.
2. To view appointment details, click the appointment in the list. Appointment Information opens and the clinical details or documents associated with this appointment are displayed.

3. (Optional) To print the appointment details, click Print.

Results of this task

You have viewed past or other appointments and printed the details.
Chapter 7 The Home tab

Billing

The Billing section is only available on the Home tab if your organization has the online bill pay feature enabled.

The charges and amount due are displayed on the Billing section, and Amount Due is updated with the first sign-in of the day.

![Billing Table]

To make a payment, click Make a Payment and Patient Responsibility opens. Find the amount due in the list of invoices, and follow the steps as described in "Manage Billing".

App Center

The App Center section on the Home tab provides access to applications that are installed on FollowMyHealth® and enables you to install more applications.

The following applications integrate with FollowMyHealth® and capture data to post to your health record.

> My Charts
> Health Journal
> Know My Health
> Blue Button®
> Blood Sugar

My Charts, Health Journal, and Know My Health are automatically installed for you when you create your account.

Attention: Device applications, such as Telcare, Withings, and iHealth®, are no longer connected to the patient portal through App Center. These applications and devices are available through Health Sources on the Home tab or from My Account > My Connections > With Devices and Apps through Health Sources.
When you open **App Center**, a message is displayed to inform you that the device connections are managed in **My Connections**. Click **OK, I got it** to remove the message.

## Install applications

1. From **App Center** on the **Home** tab, click **Add Apps**. **App Store** opens.

   ![App Store](image)

   **My Charts**
   - **Uninstall**
   - **Price:** Free
   - **Author:** FollowMyHealth™
   - **Version:** 1.0.0
   
   This application charts results you have highlighted in your health record. This application may also display results which occur frequently within your record.

   **Withings Digital Scale**
   - **Install**
   - **Price:** Free
   - **Author:** FollowMyHealth™
   - **Version:** 1.0.0
   
   Monitor changes in your weight with graphs automatically generated by the Withings scale and avoid getting discouraged. Share your progress with friends on your blog, Facebook or Twitter. Let your friends cheer you on! Set your goals and get a weekly progress report by email.

   **Blue Button®**
   - **Install**
   - **Download**

2. Click **Install** for the application that you want add. The application automatically installs and is available in the browser.

   **Note:** If you are installing the single sign on (SSO) application, a security and privacy disclaimer is displayed. You must click **Yes** to continue with the installation.
Chapter 7 The Home tab

If you click **Uninstall**, the application is automatically removed and does not display when you browse your applications.

**What to do next**

Each installed application is represented by a blue dash ( ├── ─── ) icon. Point to the dash icon to display the application name. When you click the icon, the application opens. Alternatively, use the backward and forward arrow icons to switch between applications.

**Manage a Health Journal entry**

Health Journal is an application that provides an online journal for notes about your health.

**Important**: Health Journal entries are never shared outside of your FollowMyHealth® account, but you can print the entries to share with your provider.

1. From the **Home** tab, click **New** under **Health Journal**. A journal entry opens.
2. Enter a title and notes for the journal entry.

   **Note:** Journal entries are private. The provider cannot read your entries.

3. Click **Save**.

   The journal entries are posted on the main page of the Health Journal application. The journal entries are also viewable from the **Home** tab in the **App Center** section.

4. To view additional journal entries that are not displayed in **App Center** on the **Home** tab, click **View More**.

   Click the arrow on the journal entry to see the entry details and open the entry in Health Journal where you can edit, print, or delete the entry.

5. (Optional) To edit the entry, change the text or add more content to the entry and click **Save**.

6. (Optional) To print the journal entries to share with your provider, click **Print**.

7. (Optional) To delete a journal entry, click **Delete**.

   Click **Yes** to confirm that you want to delete the entry.
Manage My Charts data

The My Charts application automatically displays charts for weight, blood pressure, and the top most-resulted item in your FollowMyHealth® account.

These charts are the default view if each item has more than 3 data points. If any of the automatically-graphed items has less than 3 data points, the graph does not display.

If you add your own vital signs at home, they are displayed the next time you sign in.

1. From the App Center section on the Home tab, click the title of the graph that you want to view.

The chart expands.
2. (Optional) To print the chart, click **Print this Chart**.
3. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.
4. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.
5. Click the graph title to return the graph back to the thumbnail size.
6. To add a chart, click **Add a Chart**.
   **Add a Chart to your Charts Widget** opens.
Chapter 7 The Home tab

7. Select the type of data that you want to include in the chart. You can add any result type or vital sign that has more than 3 data points. You can also select more than 1 item for a single chart.

    Chart Name is automatically added by the application, based on the items that you selected.

8. Click Add this Chart. The new chart is added to the My Charts application and is listed in the App Center section.

Download your health data with Blue Button

Use the Blue Button® application to download your medical information into a file that is recognized by the majority of applications used by providers.

1. From App Center on the Home tab, go to the Blue Button® application.
2. Click **Download My Data**. 
   **Disclaimer** opens.

3. Click **Yes** to accept the disclaimer. 
   You must accept the disclaimer before proceeding. This disclaimer states that you are responsible for sending your medical information outside of FollowMyHealth®. 
   **Download My Data** opens.

4. From **Step1: Select File Type**, select the type of file that you want your data to be packaged in and click **Download**. 
The following file types are available:

   **Plain Text File**
   This option creates a file of your entire universal health record (UHR) in a format that is easy to read.

   **HTML File**
   Some healthcare organizations might request your information in this file format. 
   The results of the download can vary depending on the browser that you are using, but you must click **Save As** to save the file to your desktop.

**Results of this task**
Your health information is downloaded and saved, and you can share the data with your healthcare provider.

**Enter a blood sugar reading**
Use the Blood Sugar application to manually enter your blood glucose reading in your patient portal account.

1. From **App Center** on the **Home** tab, go to the Blood Sugar application.
2. For **Date Taken**, enter the day that the reading was taken. You can use the calendar view to select your date.

3. Enter the time of day that the reading was taken and select **AM** or **PM**.

4. For **Glucose**, enter the blood glucose reading value.

5. For **Tag**, select when the blood glucose reading was taken. For example, before a meal, before bed time, before an activity, and so on.

6. Click **Save**. A window opens with the message **Blood Sugar result saved**.

7. Click **OK**.

**Results of this task**
The reading is sent to **My Health > Results**.
Know My Health

Know My Health is an enforced application in App Center that exists for all patients with a FollowMyHealth® account. Know My Health provides patient education materials from MedlinePlus that can be printed or emailed.

Know My Health includes a search tool that searches matches by name only, not article content. You can also filter Know My Health by education type, such as Conditions, Medications, or Results. When you click an item in the Know My Health application, associated education content from MedlinePlus opens.

Single sign on

If your provider has a single sign on (SSO) application available in App Center, you can use the application to set up SSO between your FollowMyHealth® account and third-party applications.

SSO enables you to sign in to a third-party application from FollowMyHealth®.

If your provider has set up the application to automatically upload to FollowMyHealth®, the SSO application is displayed in App Center and ready for you to use. Otherwise, you must install the application from App Center.
Health Sources

Health Sources is a device application library that you can use to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account.

You can browse Available Health Sources to find health sources that are compatible with FollowMyHealth®, such as Withings, Telcare, iHealth®, and so on. After you complete the connection process, the health source is displayed under Your Connected Health Sources.

In previous releases, these application and device connections were completed through App Center.

Health Sources provides several ways to access more information about the types of products that can connect with FollowMyHealth® including information about supported products, how to purchase products, and a quick guide to connect the applications and devices.
Learn more about Health Sources

Click **Learn more about Health Sources** to open a quick reference about health sources.

**What are they?**
Devices and apps can be used to track things like activity, blood pressure and blood glucose, just to name a few. When connected to FollowMyHealth® this information can be automatically included in your record. We call these connections health sources.

**What is supported?**
Only the devices and apps shown under “My Connections” are currently supported. Each item also lists which specific measurements can be imported into your FollowMyHealth® records.

**Which one is right for me?**
Learn more about each health source by visiting the linked website for the health source.

**Where can I buy it?**
They can be purchased directly online and many are also available at local retailers. Supported partner applications, associated with many of the devices, can be found in the Apple® Store and Google Play.

Visit product website

Click **Visit product website** from any connected health source to be directed to the product website where you can purchase devices and learn more about the products.

Supported products and services

Click **Supported products and services** from any connected health source to view a list of devices that are supported by FollowMyHealth®. Click **Hide Supported products and services** if you do not want the list expanded in Health Sources.
Access Health Sources from My Account

You can access Health Sources from the patient portal My Account menu.

**Health Sources** is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements, the readings are viewable in the patient portal. A list of your most recent readings are also available on the Home tab.

1. From the patient portal, click **My Account > My Connections**. 
   My Connections opens.
2. Click **With Devices and Apps Health Sources**. 
   With Devices and Apps Health Sources expands.

**Results of this task**

You have accessed Health Sources.

**What to do next**

View readings, remove connections, add connections, learn more about health sources, or access product websites for devices.

Access Health Sources on the Home tab

You can access Health Sources from the patient portal Home tab.

**Health Sources** is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements, the readings are viewable in the patient portal. A list of your most recent readings is also available on the Home tab.

From the Health Sources section on the Home tab, click **Manage Health Sources**.

**Note:** If you are not connected to at least 1 health source, click **Connect a Health Source**. You are directed to My Connections where you can view available health sources.

My Connections opens and With Devices and Apps through Health Sources is expanded.
Results of this task
You have accessed Health Sources.

What to do next
You can now view readings, remove connections, add connections, learn more about health sources, or access product web sites for devices.

Access Health Sources from a goal
You can access Health Sources from your active goals in the Goals tab.

Before you begin
The Goals tab is only displayed if your provider has enabled the goals feature.

Health Sources is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements for your goal that your provider set for you, the readings are viewable in the patient portal.

1. From the Home tab, click My Health. My Health opens.
2. Click the Goals tab. Goals opens.
3. Expand Active Goals.
4. From an active goal, click Health Sources. My Connections opens and With Devices and Apps through Health Sources expands.
Results of this task
You have accessed Health Sources.

What to do next
View readings, remove connections, add connections, learn more about health sources, or access product websites for devices.
Set up devices

Connect to health sources

You can add and remove connections for health sources.

Refer to the instructions for each health source that is supported by FollowMyHealth® to connect the health source.

View available health sources from Available Health Sources. The number of health sources is displayed next to the Available Health Sources label.

After you add a health source, the health source is displayed in Your Connected Health Sources and the number of connected health sources is displayed next to the Your Connected Health Sources label.
To disconnect a health source, click **Remove Connection** from the health source displayed in **Your Connected Health Sources**. You must confirm that you want to remove the connection by clicking **Yes** in the confirmation window that is displayed. After you click **Yes**, the health source connection is removed and you cannot add new data to the patient portal with the health source application. However, you can still view the historical data and can restore the connection at any time.

If a health source is no longer supported by FollowMyHealth® and is removed from **Health Sources**, a message is displayed in **Your Connected Health Sources**. Click **OK, I got it** to remove the message.

The historical data that is collected by the health source remains available in your health record. You can continue to use the device and applications, but the data is not sent to your patient portal account.
Connect an iHealth health source

Use the iHealth® health source to access weight, blood pressure, and blood glucose measurements from your patient portal account.

Before you begin
You must purchase an iHealth® device. Click Visit product website from the iHealth® application in Health Sources to be directed to the iHealth® Store.

1. From the patient portal, click My Account > My Connections. My Connections opens.
2. Click the With Devices and Apps through Health Sources tab. The With Devices and Apps through Health Sources tab is displayed and you can view your connected health sources and available health sources.
3. From Available Health Sources, find the iHealth® health source and click Add Connection. iHealth Labs Login opens.
   Follow the instructions from the iHealth® web page to complete the connection.
Chapter 7 The Home tab

Results of this task
The iHealth® health source is connected to FollowMyHealth®.
The iHealth® health source is now listed under Your Connected Health Sources.

Connect a Telcare health source
The Telcare health source provides a link between FollowMyHealth® and your personal Telcare blood glucose meter. You can take your blood glucose reading and the data automatically uploads to the patient portal.

Before you begin
You must purchase a Telcare blood glucose meter. Click Visit product website from the Telcare application in Health Sources to be directed to the Telcare Store.

1. From the patient portal, click My Account > My Connections. My Connections opens.
2. Click the With Devices and Apps through Health Sources tab. The With Devices and Apps through Health Sources tab is displayed and you can view your connected health sources and available health sources.
3. From Available Health Sources, find the Telcare health source and click Add Connection. The Telcare web page opens.
4. Sign in with the user name and password that you created when you created your Telcare account.
5. Follow the steps provided by the Telcare web page to connect your blood glucose meter.

Results of this task
The Telcare Blood Glucose Meter is connected to FollowMyHealth®. The Telcare health source is now listed under Your Connected Health Sources.

Connect a Withings health source
The Withings health source provides a link between FollowMyHealth® and your personal Withings device. You can measure your vital signs and the data automatically uploads to the patient portal.

Before you begin
You must purchase a Withings device. Click Visit product website from the Withings health source in Health Sources to be directed to the Withings Store.

1. From the patient portal, click My Account > My Connections. My Connections opens.
2. Click the With Devices and Apps through Health Sources tab. The With Devices and Apps through Health Sources is displayed and you can view your connected health sources and available health sources.

3. From Available Health Sources, find the Withings health source and click Add Connection. My Withings account opens. If you do not have an account, click Don't have an account yet. Account Creation opens and you can create an account.

4. Sign in with the user name and password that you created when you created your Withings account. Authorize FollowMyHealth opens.

5. Follow the steps provided by the Withings web page to connect your device.

**Results of this task**
The Withings health source is connected to FollowMyHealth®. The Withings health source is now listed under Your Connected Health Sources.

**Device list**
Wireless devices, such as weight scales, blood pressure cuffs, and blood glucose monitors, enable you to automatically import weight, blood pressure, and glucose readings into the patient portal.

Each device has an application in Health Sources that integrates the device with FollowMyHealth®.

<table>
<thead>
<tr>
<th>Device</th>
<th>Features</th>
<th>FollowMyHealth integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>iHealth® Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td></td>
<td>Measures blood pressure</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Measures pulse</td>
<td></td>
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<tr>
<td>Device</td>
<td>Features</td>
<td>FollowMyHealth integration</td>
</tr>
<tr>
<td>--------</td>
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</tr>
<tr>
<td>iHealth® Labs Blood Pressure Dock</td>
<td>Connects to iPhone®, iPad®, and iPod®. Measures blood pressure. Measures pulse.</td>
<td>Blood pressure readings are imported into FollowMyHealth.</td>
</tr>
<tr>
<td>iHealth® Labs Wireless Body Analysis Scale</td>
<td>Wi-Fi-enabled. Measures weight, body fat, body water, visceral fat, body muscle mass, and bone mass.</td>
<td>Weight and BMI readings are imported into FollowMyHealth.</td>
</tr>
<tr>
<td>iHealth® Labs Wireless Scale</td>
<td>Bluetooth-enabled. Measures weight.</td>
<td>Weight and BMI readings are imported into FollowMyHealth.</td>
</tr>
<tr>
<td>iHealth® Labs iHealth Align</td>
<td>Attach to Android™ or Apple® devices. Measures blood glucose.</td>
<td>Blood glucose readings imported into FollowMyHealth.</td>
</tr>
<tr>
<td>Withings Wireless Scale</td>
<td>Bluetooth and Wi-Fi-enabled. Measures weight. Calculates BMI.</td>
<td>Weight readings are imported into FollowMyHealth.</td>
</tr>
</tbody>
</table>
iHealth® Labs Wireless Blood Pressure Wrist Monitor
http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

iHealth® Labs Wireless Blood Pressure Wrist Monitor
http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

iHealth® Labs Wireless Blood Pressure Monitor
http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-monitor/

iHealth® Labs Blood Pressure Dock
http://www.ihealthlabs.com/support/blood-pressure-monitors/blood-pressure-dock/

iHealth® Labs Wireless Body Analysis Scale
http://www.ihealthlabs.com/wireless-scales/wireless-body-analysis-scale/

iHealth® Labs Wireless Scale
http://www.ihealthlabs.com/wireless-scales/wireless-scale/

iHealth® Labs Wireless Smart Gluco-Monitoring System

iHealth® Labs iHealth Align
http://www.ihealthlabs.com/glucometer/ihealth-align/

Withings Smart Body Analyzer

Withings Wireless Scale

Withings Wireless Blood Pressure Monitor
Chapter 7 The Home tab

Telcare Blood Glucose Meter

http://www.telcare.com/
Chapter 8

eVisits

An eVisit is a consultation with your provider through secure email messaging. The eVisit process includes answering questions to qualify your symptoms, identifying the reason for the eVisit, and if needed, getting a prescription from your provider.

The following are eVisit requirements and features.

> You must have a connection with a provider that supports eVisits.
> If your provider has the eVisit feature, the eVisit button is displayed in the Inbox in your patient portal account.
> Your symptoms must be qualified during the eVisit. If your symptoms are too severe, the eVisit stops and you are asked to see the provider at his or her office, or seek emergency medical attention.
> A flat fee might be charged by your provider and is paid when requesting your eVisit.
> All responses to your eVisit are sent to your Inbox in the patient portal.

**Note:** Internet Explorer v8 is not currently supported for eVisits. You must have an Internet Explorer version later than v8.

Request an eVisit from your Inbox

1. From the Home tab, click Inbox > eVisit. Request an eVisit opens.

2. From Provider, select the provider that you want to have an eVisit with.
Chapter 8 eVisits

Note: If your provider is not listed, he or she does not have the eVisit feature enabled.

Emergency Message Disclaimer opens.

3. Click Next.

Reason for eVisit is displayed.

4. From Reason for eVisit, select the symptoms you are experiencing.

5. Read the terms of service and select I understand and accept the Terms of Service.
6. Click **Next**. **Qualify** opens. The reason for eVisit that you selected is displayed at the top of the window. Read the conditions and answer the question to qualify your symptoms.
Chapter 8 eVisits

If you are experiencing any of the conditions or symptoms listed, click Yes. A message opens confirming that you have a condition that is outside the guidelines for treatment through an eVisit. Click OK. The eVisit workflow ends.

Click No, if you are not experiencing any of the symptoms or conditions listed, and then click Next. Chief Complaint opens.
7. Answer the questions about your symptoms and click Next. Other Information opens.
8. Enter information in the box that you want your provider to know and click **Next**. **Confirm Patient Information** opens.
If your provider has the eVisit payment feature enabled, this window displays the **Next** button. If your provider does not have the eVisit payment feature enabled, this window displays the **Send** button. After you click **Send**, a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click **OK** to finish the eVisit.

After you click **Next**, **Payment** opens. Click **Go to Payment Page** to pay your eVisit bill. Click **Complete** and a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click **OK** to finish the eVisit.

**Note:** The online payment might be optional, depending on how your physician has set up the solution.
Your eVisit request is sent to the provider. You can view the sent message from your Sent folder in your Inbox. The message content is a summary of the eVisit request.

9. Read the terms of service and select I understand and accept the Terms of Service.
10. Click **Next**. **Qualify** opens. The reason for eVisit that you selected is displayed at the top of the window. Read the conditions and answer the question to qualify your symptoms.
If you are experiencing any of the conditions or symptoms listed, click Yes. A message opens confirming that you have a condition that is outside the guidelines for treatment through an eVisit. Click OK. The eVisit workflow ends.

> Click No, if you are not experiencing any of the symptoms or conditions listed, and then click Next. Chief Complaint opens.
11. Answer the questions about your symptoms and click Next. Other Information opens.
12. Enter information in the box that you want your provider to know and click Next. Confirm Patient Information opens.
You can change your preferred phone number and pharmacy from this window. When you select the phone number type (Home, Work, Cell, Other), the phone number is automatically filled and your country flag of origin is displayed.

If your provider has the eVisit payment feature enabled, this window displays the Next button. If your provider does not have the eVisit payment feature enabled, this window displays the Send button. After you click Send, a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click OK to finish the eVisit.

After you click Next, Payment opens. Click Go to Payment Page to pay your eVisit bill. Click Complete and a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click OK to finish the eVisit.

**Note:** The online payment might be optional, depending on how your physician has set up the solution.
Your eVisit request is sent to the provider. You can view the sent message from your *Sent* folder in *Inbox*. The message content is a summary of the eVisit request.

**Results of this task**
The eVisit request message is located in the *Sent* folder in your *Inbox*. The message content is a summary of the eVisit request.
The provider receives the eVisit request, reviews your symptoms, creates a care plan, and responds to the eVisit request. The message is sent to your Inbox and you can retrieve your care plan. Your health record is also updated with the eVisit information.

A receipt is also sent through an email message to your Inbox.

Request an eVisit from Providers

1. From the Home tab, click My Account > My Connections.
2. My Connections opens.
3. Expand With Providers and Healthcare Organizations and select a provider.
5. Click Next. Request an eVisit opens.
6. If the provider name that you selected is not displayed in Provider, select the provider that you want to have an eVisit with and click Next.

   **Note:** If your provider is not listed, he or she does not have the eVisit feature enabled.

   Reason for Visit is displayed.

7. From Reason for eVisit, select the symptoms you are experiencing.

8. Read the terms of service and select I understand and accept the Terms of Service.
9. Click **Next**. 
**Qualify** opens. The reason for eVisit that you selected is displayed at the top of the window. Read the conditions and answer the question to qualify your symptoms.
Chapter 8 eVisits

If you are experiencing any of the conditions or symptoms listed, click Yes. A message opens confirming that you have a condition that is outside the guidelines for treatment through an eVisit. Click OK. The eVisit workflow ends.

Click No, if you are not experiencing any of the symptoms or conditions listed, and then click Next. Chief Complaint opens.
10. Answer the questions about your symptoms and click **Next**. **Other Information** opens.
11. Enter information in the box that you want your provider to know and click **Next**. **Confirm Patient Information** opens.
You can change your preferred phone number and pharmacy from this window. When you select the phone number type (Home, Work, Cell, Other), the phone number is automatically filled and your country flag of origin is displayed.

If your provider has the eVisit payment feature enabled, this window displays the Next button. If your provider does not have the eVisit payment feature enabled, this window displays the Send button. After you click Send, a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click OK to finish the eVisit.

After you click Next, Payment opens. Click Go to Payment Page to pay your eVisit bill. Click Complete and a message is displayed that indicates that your eVisit is submitted and the expected amount of time that you might wait for a response from your provider. Click OK to finish the eVisit.

**Note:** The online payment might be optional, depending on how your physician has set up the solution.
Your eVisit request is sent to the provider. You can view the sent message from your Sent folder in your Inbox. The message content is a summary of the eVisit request.

**Results of this task**
The eVisit request message is located in the Sent folder in your Inbox. The message content is a summary of the eVisit request.
Request an eVisit from Providers

The provider receives the eVisit request, reviews your symptoms, creates a care plan, and responds to the eVisit request. The message is sent to your Inbox and you can retrieve your care plan. Your health record is also updated with the eVisit information.

A receipt is also sent through an email message to your Inbox.
Chapter 9

Inbox

The **Inbox** tab contains all of the secure messages you have sent to and received from organizations that are connected to your universal healthcare record account.

The number of new messages in the **Inbox** tab is displayed on the **Inbox** tab.

Common options, such as **Forward** and **Reply**, are available, but the provider that you want to forward messages to, or who you want to reply to, must have these options enabled. You can also print, move, and delete messages.

If your provider has enabled the eVisit feature, you can request an eVisit from the **Inbox** tab by clicking **eVisit**.

The default folders in the **Inbox** tab are **Inbox**, **Sent**, **Outbox**, and **Trash** folders. You can create folders, nest multiple folders, and edit existing folders.

Messages are sent to the **Outbox** after you click **Send**. Your initiated message is displayed in **Outbox** until the message is delivered. Then the message is moved to **Sent**. If the message fails, the patient portal attempts to resend it for 24 hours. If the message is still unsuccessful, the message is removed from **Outbox** and you will receive a Message Delivery Failure message in your **Inbox** informing you of the problem. You can then send a new message or contact your provider through a different method.

**Compose email messages**

**Important**: Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window opens with the message

> You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send? opens after you click **Send**.

1. Click the **Inbox** tab.
   **Inbox** opens.

2. Click **Compose**.
   **Emergency Message Disclaimer** opens.

   This disclaimer opens each time you create a new message. If you want to turn off the disclaimer, select **Do not show this message again**. Or, you can turn off all message
disclaimers in My Account > Preferences > Display Preferences and clear Display message disclaimer.

3. Click OK.
Compose Email opens.

4. Enter the email recipient, subject, and message.
5. Click Send.
If you are emailing a form, a window opens to inform you that you cannot change the form after it is emailed. Click Send.
Message opens with Email Sent displayed.

6. Click OK.

Create and edit Inbox folders

1. Click the Inbox tab.
The Inbox tab is displayed.

2. Click Add Folder.
Create New Folder opens.

3. Enter the name of the folder in What would you like to name this folder.

4. Click OK.
The new folder is listed under the Inbox folder on the left.

5. To edit a folder, click Edit Folder.
You can delete, rename, or move the folder.

6. Select the folder that you want to edit.
The edit controls display.

7. Click Done.
Chapter 10

My Health

The My Health tab contains all the information about your healthcare, including conditions, medications, allergies, immunizations, test results, vital signs, documents, and your medical chart.

You can view all sections of My Health on the Summary tab, or, you can go to each section by clicking the section tab or selecting the section from the My Health tab menu.

To print the information from the tab that you are currently on, click Print. To print all tabs at 1 time, click Print All from the Summary tab. You can also email the information on 1 tab by clicking Email, or all tabs, by clicking Email All.

Summary

The Summary tab on My Health provides a current snapshot of your active medical information.

The Summary tab can be printed so that you have a hard copy of your current health information to share with your provider, carry with you in case of an emergency, or keep on file at your home. You can also directly email or fax your summary.

You can also import or export your health record file or clinical documents to or from your universal health record (UHR).

Demographics

Displays your picture, name, date of birth, and address. This information is collected from the My Info tab. To change your picture, click New Photo.

My Care Team

Add your primary providers to the care team list. The list includes the name of your provider, a note about the provider or nurse specialty, and contact information.

Diagnoses

Displays all active conditions from the Conditions tab of My Health.

Surgical History

Displays all surgical history conditions from the Conditions tab of My Health.
Allergies

Displays all active allergies from the Allergies tab of My Health.

Medications

Displays all active medications from the Medications tab of My Health.

Recent Vitals

Displays the most current value, if any, for height, weight, and body mass index (BMI).

Manage your care team list

The My Care Team list on the Summary tab, provides a quick contact list of your most frequently used healthcare providers.

The list is always available on the Summary tab and you can print the list to carry with you in case of emergency or to share with your other providers. You can also remove providers from the list and edit the provider information.

Note: Your participating providers can be viewed at My Account > My Connections > With Providers and Healthcare Organizations. My Care Team is intended as a quick reference to providers.

1. From My Health, click the Summary tab.
The Summary tab is displayed.

2. Click Add Provider.
Add Preferred Provider opens.

3. Enter the provider's name, information that distinguishes the provider from other providers, and the contact information.

4. Click Save.
The provider is listed in My Care Team.

5. To delete a provider from My Care Team, click .
A message opens to confirm that you want to delete the provider.

6. Click Yes.

7. To edit the provider information, click .
Add Preferred Provider opens.

8. Edit the information and click Save.

Export health summary documents

You can download or electronically transmit your health summary documents.

1. From My Health, click the Summary tab.
   The Summary tab is displayed.

2. Click Export.
   Export/Download your Health Record opens.

3. For Export Type, select if you want to download or transmit your document.
   - **Download**: Specifies that you want to download your file to your computer or other storage device. This is the default export type.
   - **Transmit**: Specifies that you want to electronically send your document to a third-party provider. If you select Transmit, you must select the type of file format and enter the Direct Address.

   **Important**: A direct address is a specialized communication method used by healthcare providers. If you do not know your provider’s direct address, be aware that attempting to transmit to a regular email address does not work. To send data from My Health to an email address, use the Email tool from any of the My Health windows.

4. For Select the record you would like to export from the drop down list, select the document that you want to export.
   You can export your entire health record or clinical summary documents, such as ambulatory or inpatient C-CDA documents in your record.
   - To download your FollowMyHealth Universal Health Record, select Export Plain Text file or Export HTML file.
   - To download a Clinical Summary Document, select Export CCDA (.xml) file, Export Plain Text file, or Export HTML file.
   - To transmit a Clinical Summary Document, select Send Plain Text file or Send CCDA (.xml) file.
   - To transmit your FollowMyHealth Universal Health Record, select Send Plain Text file.

5. Click Export.
Chapter 10 My Health

Results of this task
Your document is exported.

Import health summary documents
You can import a health summary document to FollowMyHealth®.

1. From My Health, click the Summary tab.
The Summary tab is displayed.
2. Click Import.
Import/Upload your Health Record opens.
3. From Choose File, browse for the file that you want to import.
4. Click Import.

Results of this task
Your document is imported.

Conditions
Conditions are known problems or diagnoses. FollowMyHealth® tracks active conditions, past medical history, surgical history, family health considerations, and personal health considerations.

The Conditions tab on My Health lists all of your conditions, including Surgical History, Active, and Family Health Conditions.

Each condition type is organized in a section. When you add a condition, you designate a type, such as Surgical History, and the condition is added to that section. The sections can be expanded and collapsed. The number of conditions in the section are displayed in parentheses next to the section title.

To view education information about a condition, click in the Education column. Specific and easy-to-read education information is displayed.

A green check mark in the New column identifies the condition as new.

Add an active condition
Active conditions are health conditions that are ongoing problems.

1. From the Conditions tab on My Health, click Add Condition.
Add Health Condition opens.

2. For **Type**, select **Health Condition**.
3. For **Name**, type the name of the condition
   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.
4. For **Status**, select **Active**.
   If a provider entered a resolved condition, select **Resolved** for **Status**. You must then enter a date when the issue was resolved.
   If a provider entered a condition that is not applicable, select **Denied**. Items that are resolved are displayed in the Past Medical History section.
5. For **Comments**, enter related comments.
6. Click **Save**.
   Confirm Add opens.
7. Click **Yes**.
The condition is listed under **Active**.

Add a surgical history condition

Surgical history conditions are health conditions that are related to surgical procedures.

1. From the **Conditions** tab on **My Health**, click **Add Condition**.
   Add Health Condition opens.
2. From **Type**, select **Surgical History**.
3. Enter the name of the condition in **Name**.
   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.
4. Select a status from **Status**.

**Resolved**

Specifies that this is a past surgery.

**Denied**

Specifies that you did not have this surgery.

5. For **Procedure Date**, enter the date of the surgery.
6. For **Provider**, enter the name of the provider that performed the surgery.
7. For **Comments**, enter related comments.
8. Click **Save**.  
   **Confirm Add** opens.

9. Click **Yes**.  
   A surgical history is added.

---

**Add a family health condition**

Family health conditions are conditions and issues that your family members have that you are at risk for. As a general rule, healthcare providers are only interested in family health conditions for blood relatives.

If a patient is adding a family health condition to his or her family health history, and he or she has authorized individual access to other patients that are family members, the patient can update the family members’ health history at the same time.

1. From the **Conditions** tab on **My Health**, click **Add Condition**.  
   **Add Health Condition** opens.

2. From **Type**, select **Family Health Condition**.

3. Enter the name of the condition in **Name**.  
   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.

4. Select a status from **Status**.

   **Active**
   
   Specifies a condition that is currently a problem for a family member.

   **Resolved**
   
   Specifies a condition that a family member has had but no longer has.

   **Denied**
   
   Specifies a condition that should not be included in your family history.

5. Enter the relationship of the family member in **Relationship**.

6. Enter related comments in **Comments**.

7. Click **Save**.  
   If you are an authorized individual, **Family Health Condition** opens. The patients that you are an authorized individual for are displayed in the window. Select family members that the health condition also applies to.
8. For **Comments**, enter related comments.
9. Click **Save**.
   - **Confirm Add** opens
10. Click **Yes**.
    The condition is listed under **Family Health Conditions** for you and the family members that you are an authorized individual for.

### Add a personal health condition

Personal health conditions include smoking status, exercise habits, drug use, or living habits.

1. From the **Conditions** tab on **My Health**, click **Add Condition**.
   - **Add Health Condition** opens.
2. For **Type**, select **Personal Health Condition**.
3. For **Name**, type the name of the condition
   When you enter the name, a list of conditions is displayed. You can select 1 of these conditions, or enter your own.
4. For **Status**, select **Active**.
   - **Active**
     Specifies an issue that is currently active.
   - **Resolved**
     Specifies an issue that used to be active, but is no longer active.
   - **Denied**
     Specifies an issue that must not be included in your personal health condition history.
5. For **Comments**, enter related comments.
6. Click **Save**.
   - **Confirm Add** opens.
7. Click **Yes**.
   The condition is listed in **Conditions**.
Medications

FollowMyHealth® lists all active, completed, discontinued, declined, and temporary deferral medications.

From the Medications tab on My Health you can add, delete, and edit medications, request a renewal, and add a preferred pharmacy.

Each medication is displayed in a section. Medications are categorized by status, including Active, Unknown, TemporaryDeferral, Declined, and Complete. You can expand and collapse the sections. The number of medications in each section is displayed in parentheses next to the section title.

To view education information about a medication, click in the Education column. Specific and easy-to-read education information is displayed.

A green check mark in the New column identifies the medication as new.

Add a medication

1. From the Medications tab on My Health, click Add Medication. Add Medication opens.
2. For Name, enter the name of the medication.
   When you enter the name, a list of medications is displayed. You can select 1 of these medications, or enter your own.
3. For Directions, enter the directions provided by the provider, or how you take your medication.
4. From Status, select the status that applies to the medication.

   Active

   Specifies a medication that you are currently taking.

   Complete

   Specifies a medication that you have finished, such as an antibiotic.

   Discontinued

   Specifies a medication that your provider has asked you to stop taking or is discontinued.
Unknown

Specifies a medication that does not fit in the other categories provided.

Declined

Specifies a medication that the provider added that you declined to take.

On Hold

Specifies an added medication that is on hold until your provider confirms the medication. This medication is added under the TemporaryDeferral section.

5. For Provider, enter the provider who prescribed the medication.
6. For Comments, enter related comments.
7. Click Save.
   Confirm Add opens.
8. Click Yes.
   The medication is listed in Medications.

Add a pharmacy

1. From the Medications tab on My Health, click Edit under Preferred Pharmacy. Pharmacy Search opens.
2. For Search, enter the ZIP Code of or near the pharmacy.
   By default, your ZIP Code is displayed when Pharmacy Search opens. You can change the value.
3. For Distance in Miles, select the proximity in miles that you want the application to search.
   The application searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.
4. Select a pharmacy and click Connect.
   The pharmacy that you selected is now listed as your preferred pharmacy under Preferred Pharmacy.
Chapter 10 My Health

Request a medication renewal

If you use the online request, there is no need to call the office to request the renewal.

You can request a prescription refill from a provider if the provider meets the following criteria:

- The provider has enabled **Allow Prescription Renewals**.
- The provider is the most recent ordering provider of the your medication.

The following features apply to providers that receive prescription refills:

- All ordering providers of the medication will receive the refill request. If you have been prescribed the medication multiple times by more than 1 provider, all of these providers are available to receive the request if the provider has **Allow Prescription Renewals** enabled.
- All authorizing providers of the medication will receive the refill request. If the medication is refilled, but the authorizing provider changed, the authorizing providers are available to receive the request if he or she has **Allow Prescription Renewals** enabled.
- If the ordering or authorizing provider is not in your provider collection, he or she is not included in the refill request unless the provider has enabled the **Rx Renewal Request**.

If you need a prescription refill, notify the pharmacy. Online renewal requests must only be used when you are out of refills.

1. From **My Health**, click the **Medications** tab. The **Medications** tab is displayed.

2. In the medication that you want to renew, click ![Renew Prescription](image). **Renew Prescription** opens.

3. Select the provider who prescribed the medication to you from **Provider**. You can only request a renewal from a provider who has prescribed this medicine for you in the past. The last provider who wrote the prescription for you is displayed as the default provider in **Provider**. **Prescription** and **Medication Info** are also filled by default and cannot be changed.

4. **(Optional)** To change the pharmacy where the renewal is filled, click **Change** in **Pharmacy Location**. Your preferred pharmacy is listed in **Pharmacy Location** as the default pharmacy.

**Attention**: If you change the pharmacy during the renew prescription action, the alternate pharmacy is only applied to this specific renewal request. Use this option if you use a separate pharmacy for some
medications, such as a mail order pharmacy used only for ongoing prescriptions.

5. For **Comments**, enter any comments that you want your provider to know about the request.
6. Click **Send**.
   Your provider receives an electronic request to refill the prescription.

**Allergies**

FollowMyHealth® lists all active, resolved, denied, and inactive allergies.

From the **Allergies** tab on **My Health**, you can add, delete, and edit allergies.

Allergies are categorized by status, including Active, Inactive, Unknown, Denied, and Resolved. You can expand and collapse the sections. The number of allergies in each section is displayed in parentheses next to the section title.

**Add an allergy**

1. From the **Allergies** tab on **My Health**, click **Add Allergy**.
   **Add Allergy** opens.
2. From **Allergy Type**, select an allergy type.

**Medication**

Specifies that you have an allergy to a medication.

**Environmental**

Specifies that you have an allergy to items in your environment, such as pets, trees, or dust.

**Food**

Specifies that you have an allergy to certain food types.

**Unknown**

Specifies that you do not know what type of allergy you have.

3. For **Name**, enter the name of the allergy.
   When you enter the name, a list of allergies is displayed. You can select 1 of these allergies, or enter your own.
Chapter 10 My Health

4. From **Status**, select the status that applies to the allergy.

   - **Active**
     
     Specifies an active allergy or an allergy you currently have.

   - **Inactive**
     
     Specifies an allergy that you might still have, but it is not currently an issue for you.

   - **Resolved**
     
     Specifies an allergy that you no longer have.

   - **Denied**
     
     Specifies that you know you do not have a known allergy. It is important that non-allergy specifics are added to your health record so that providers know that they can give you a certain medication or use latex.

5. (Optional) For **Onset**, enter the date that you first became aware of the allergy.

6. For **Allergic Reaction**, enter what kind of reaction you experience when exposed to the item, such as rash or nausea, and click . The reaction is displayed in **Allergic Reactions**.

7. For **Comments**, enter related comments.

8. Click **Save**. **Confirm Add** opens.

9. Click **Yes**.

   The allergy is listed in **Allergies**.

Immunizations

You can view your immunization history, add, edit, and delete immunizations, and access vaccine information sheets and immunization schedules that are published by the Centers for Disease Control and Prevention (CDC) from the **Immunizations** tab on **My Health**.

Immunizations are categorized by status, including Received, Declined, Unknown, and OnHold. The **Show** menu is a drop-down menu that you can use to filter the immunizations by status. You can select multiple status types so that all Received, Declined, Unknown, and On Hold immunizations are displayed. The **Show** menu is not available if you do not have immunizations recorded in your health record. Only statuses for which you have at least 1 immunization are
Immunizations are grouped by their series. Only the immunizations’ series for which you have received at least 1 immunization are displayed. Immunization records within a series are displayed in a descending order by Date. For example, the latest immunization is displayed first. If you have more than 3 immunization records applicable to Influenza (Flu) series or are a patient between ages 19 and 64, and have more than 3 immunization records applicable to Pneumococcal series, then the immunizations in the series are collapsed and the last 3 immunizations are displayed.

Immunizations for all other series are always expanded with no option to collapse. You can click View More to display more immunizations or View Less to display less immunizations.

Received immunizations are displayed as the default view if you have at least 1 immunization of Received status in your history. If you do not have received immunizations, but have immunizations of other statuses, all immunization status types are displayed as the default view.

Add an immunization

You can add immunizations that you have received in the past that are not yet added to your personal health record (PHR).

1. From the Home tab, click the My Health tab. My Health opens.
2. Click the Immunizations tab. Immunizations opens.
3. Click Add Immunization.
4. For Immunization, enter the name of the immunization. Search for an immunization by full name, brand name, or abbreviation. The search results will include exact and similar matches making it easy for you to find the immunization even if you do not know the correct spelling. The application uses advanced algorithms and machine learning to return immunizations. Search results are listed in order by relevance. The most relevant matches are displayed at the top of the list.
5. For Date, enter the date that you received the immunization. Today’s calendar date is highlighted in the calendar tool so that selecting a date is easy.
6. (Optional) For Series, enter the series number of the immunization. Series is only required if this immunization is an immunization in a series of 2 or 3 shots.
7. For Status, select the status that applies to the medication.
Chapter 10 My Health

Received

Specifies an immunization that you have received.

OnHold

Specifies an immunization that you must receive but cannot receive at this time.

Declined

Specifies an immunization that you were offered that you declined.

8. For **Provider**, enter the name of the provider who administered the immunization.

9. For **Comments**, enter related comments.
   This box is limited to 4000 characters.

10. Click **Save**.
    **Confirm Add** opens.

11. Click **Yes**.
    The immunization is listed in **Immunizations**.

View immunization details

1. From the **Home** tab, click the **My Health** tab.
   **My Health** opens.

2. Click the **Immunizations** tab.
   **Immunizations** opens.

3. Click an immunization that you want to view.
   The detail window opens.
   If the immunization is patient-entered, the **Edit Immunization** window opens and you can edit the immunization details. If the immunization is entered by your provider, the **View Immunization** window opens and is read-only.

4. Do either of the following steps:
   > Edit the immunization details and click **Save**.
   > View the immunization details and exit the window and click **Close**.

Results of this task
You have viewed details about your immunizations.
View CDC immunization schedules

You can view the most current Centers for Disease Control and Prevention (CDC) immunization schedules from the patient portal to ensure that you are compliant with and to plan for required pending immunizations.

You can view the following immunization schedule types.

- Easy-to-Read Schedule for Children, Birth through 6 Years
- Easy-to-Read Schedule for Preteens and Teens, 7-18 Years
- Easy-to-Read Schedule for Adults, by Age

1. From the Home tab, click the My Health tab. My Health opens.
2. Click the Immunizations tab. Immunizations opens.
3. To view a default immunization schedule that is based on your date of birth, click View Schedule. The immunization based on your age is displayed. The application uses the date of birth that is listed in the Demographics section of your health record.
4. To select a specific age group immunization schedule, click the drop-down menu arrow located to the right of View Schedule. The immunization schedule types are displayed.
5. Select an immunization schedule type from the menu. The immunization schedule type is displayed.

What to do next
Download or print a PDF copy of the immunization schedule.

View vaccine information sheets

1. From the Home tab, click the My Health tab. My Health opens.
2. Click the Immunizations tab. Immunizations opens.
3. Point the mouse pointer to the immunization that you want to view.
Chapter 10 My Health

The InfoButton™ education icon (ℹ️) is displayed.

4. Click 📘.
   Vaccination Information opens.

5. Click the hyperlink listed under Vaccine Information Sheets.
   The vaccine information sheet is displayed in PDF.

What to do next
Save or print the vaccination sheet.

Share your immunization record

Use the Send menu on the Immunizations tab to email, print, or fax your immunization record.

1. From the Home tab, click the My Health tab.
   My Health opens.

2. Click the Immunizations tab.
   Immunizations opens.

3. Click the Send drop-down menu.
   The Send menu is displayed.

4. Do either of the following steps:
   > Select Email to send your immunization record by email message. Enter the email address to send your record to and click Send. A message is displayed, indicating that your email message is sent.
   Click OK.
   > Select Print to print your immunization on your local printer. Print opens. Click Print.
   > Select Fax to fax your immunization record. Fax Immunizations opens. Enter the recipient in the To box and the fax number in the Fax Number box and click Send. A message is displayed, indicating that your fax is sent. Click OK.

Results of this task
You have emailed, printed, or faxed your immunization record.
Results

FollowMyHealth® lists lab results, radiology results, or any other results if your provider who ordered the tests has enabled the results to be viewed online.

From the Results tab on My Health you can add, delete, and edit results, as well as generate graphs to display historical results.

Each result that is added is listed in its own section. You can expand and collapse the sections. The number of results in each section is displayed in parentheses next to the section title. A section that has 3 or more results or data points, can be displayed in a graph.

To view education information about a result, click in the Education column. Specific and easy-to-read education information is displayed.

A green check mark in the New column identifies the result as new.

Non-numeric results, such as radiology and microbiology, are displayed with an indicator identifies the result as Normal or Abnormal. If the result value is unknown, no indicator is displayed.

Add a result

1. From the Results tab on My Health, click Add Result. Add Result opens.

2. From Name, enter the name of the result. When you enter the name, a list of test results is displayed. You can select 1 of these results or enter your own.

3. For Result Date, enter the date that you learned the results.

4. For Value, enter the actual result.

5. For Provider, enter the provider who ordered the test.

6. For Units, enter the units from the test result. For example, enter mmHg for blood pressure.

7. For Comments, enter related comments.

8. Click Save. Confirm Add opens.

9. Click Yes. The result is listed under result type.
Graph results

You can graph results that contains 3 or more results or data points.

1. From My Health, click the Results tab.
   The Results tab is displayed.

2. In the result that you want to graph, click 📊.
   My Charts opens.

3. Click Print this Chart to print the chart, or click Pin to your Charts to save the graph in the My Charts application in App Center on the Home tab.

View results

There are 2 ways to view your results, depending on the type of results.

1. From My Health, select the Results tab.
   The Results tab is displayed.

   Results that are numerical are contained in the Range column, with a visual representation of where the values lie within a range (low, normal, and high). Range information is provided only if the provider sent this information with your results.
The **Range** column is empty for text-based results that are non-numeric, such as for pathology and radiology. Most numeric results from your provider have an associated reference range of normal values. You can view the range by pointing to the graphic in the **Range** column or by printing the result.

**Important:** When researching reference ranges, be aware that high and low values can be slightly different between lab facilities. The reference ranges displayed to you in your universal health record (UHR) come directly from your provider’s electronic health record (EHR) application. The results range that is displayed to you is an accurate representation of what is considered low and high using the standards employed by your healthcare organization.

2. To view text-based results, click ![Image]. The result detail window opens.

## Vital signs

FollowMyHealth® lists vital signs if your provider who took the vital signs has enabled the results to be viewed online.

From the **Vitals** tab on **My Health** you can add, delete, and edit vital signs, as well as generate graphs to display historical vital sign results.

When you add or edit vital signs in your health record, the unit of measure is automatically defaults to your specified display preference setting.

**Note:** Body Mass Index (BMI) is always displayed in kilograms per meter squared, regardless of the display preference setting.

You can edit only the vital signs that are **Patient Entered**. However, you can delete any vital sign from your health record.

Each vital sign that is added is listed in its own section. You can expand and collapse the sections. The number of vital signs in each section is displayed in parentheses next to the section title. A section that has more than 3 data points or results can be displayed in a graph.
Chapter 10 My Health

Add a vital sign

1. From the Vitals tab on My Health, click Add Vital. Add Vital opens.
2. From Type, enter the type of the vital sign. When you enter the type, a list of vital sign types is displayed for you to select.
3. For Date Taken, enter the date that the vital sign is taken.
4. For Value, enter the vital sign reading.
5. For Comments, enter related comments.
6. Click Save. Confirm Add opens.
7. Click Yes. The vital sign is listed under the vital sign type.

Documents

FollowMyHealth® lists documents such as release forms you have signed, office visit documents, notes, and other documents related to your health record.

Note: Scanned documents are displayed in black and white only.

From the Documents tab in My Health, you can add your own documents and view documents added by your provider.

When new documents are posted to your account, the number of new documents is displayed on the Documents tab in My Health. When you select the Documents tab, the new items are indicated with a check mark.

When you complete and send back an electronic form that you received from your provider, the form is added to the Documents tab. If you are connected to a virtual organization, you receive a release of information form for any child organization that you are connected to.

Important: Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window opens with the message: You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send?.

Allscripts FollowMyHealth® | July 13, 2016
Universal Health Record Patient Access v2.2.8 User Guide
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Add a document

You can upload .jpeg, .png, .txt, and .pdf document file types. If you try to upload a document type that is not supported, a warning message is displayed.

Note: Printing, emailing, and faxing patient-uploaded .txt files is currently not supported.

1. From the Documents tab on My Health, click Add Document. Add Document opens.
2. For Name, enter the name of the document.
3. For Date, enter the date that the document was created.
4. For Provider, enter the provider that the document is from.
5. Click Choose File to browse your computer for the document.
   a) Select the file and click Open. The document is listed under Files to Upload.
6. Click Save.
7. Click to view your document. The document details open.
   The document details include who wrote the document and the detailed notes included in the document. You can print or fax the document details from the details window.

Results of this task
The document is added to the Documents tab.

Chart

Search from the Chart tab to find a particular item by date or provider in FollowMyHealth®.

All information from My Health can be viewed in the Chart tab. View all clinical items from your record sorted by date, such as the date when the item was first filed to your universal health record (UHR) or by provider, such as the provider who is associated to each item in the EHR application.

1. From My Health, click the Chart tab. The Chart tab is displayed.
Chapter 10 My Health

2. From **Sort By**, select **Provider** or **Date**.
   The chart items are listed to the left.

3. Click a chart item to open in the right pane.
   You can print or email the information.

**Goals**

Your care provider can set health goals for you to achieve from home, for example "Lose 10 pounds in 3 months" or "Maintain a blood pressure under 140/90 for the next 30 days". These goals are displayed on the **Goals** tab in the patient portal to help you reach your goal. The number of unaccepted goals is displayed on the **Goals** tab until you accept or decline the new goals.

**Note:** The **Goals** tab is not displayed unless your provider has enabled the goals feature.

Wireless blood pressure monitors, blood glucose monitors, and wireless scales can be used to automatically send data related to these goals to Allscripts FollowMyHealth® Patient Access. These devices make it easy for you to follow your care plan. You can also manually enter these readings if you do not have a wireless device.

Each goal has rules specific to your condition. These rules are set when your provider creates the goal for you. Data related to the goal is analyzed against these rules.

Goals are organized by status.

**New**

If you have a new goal, a message is displayed on the **Goals** tab. You must accept or decline the goal to proceed with the goal. Notifications can be sent to the ordering provider if you do not respond to the new goal after a certain time period, based on rules set by your provider when the goal was created.

**Active**

The goal is listed under **Active Goals** when you accept the goal and you are actively collecting readings. Notifications can be sent to the ordering provider if your readings violate rules specific to the goal or if readings are not recorded based on the rules set by your provider. Results are also filed if a notification is triggered.

**Completed**

Completed goals are listed under **Completed Goals**. The goal is completed automatically when the goal is reached or the end date has passed. Final results are sent to the electronic health
Goals

record (EHR) application and the provider can view the results. Notifications are no longer triggered and readings are no longer captured for completed goals.

Declined

Goals that you refuse to follow are listed in Declined Goals. You have the option to decline a goal when it is new or active. Your provider receives a notification if the goal is declined. Notifications are no longer triggered and readings are no longer captured for declined goals.

Cancelled

If a goal is cancelled by your provider, the goal is moved to Cancelled Goals. Notifications are no longer triggered and readings are no longer captured for cancelled goals.

Goal types

Weight management goal

The weight management goal is used to set a goal for weight gain or loss for a patient with obesity, bulimia, or anorexia.

The following list includes best practices when managing your weight management goals.

> Readings are entered manually or with a compatible wireless scale. The compatible device automatically send the readings to the patient portal.
> Only weights from your compatible devices or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
> The graph data point tooltip includes the reading, body mass index (BMI), and patient-entered comments.
> The progress is displayed as follows:

— The first reading on the goal is used to calculate the target weight based on the weight set in the goal. The goal start and end dates are displayed in the header.
— Last Reading specifies the last weight reading and the current BMI.
— Target Weight specifies the target weight.

♦ The target weight is the green horizontal line.
♦ The initial weight is the red horizontal line.
♦ The blue line is the weighted average of all the readings and displays how the patient is trending.
The progress indicator shows your progress towards reaching your goal. It indicates how much your weight has changed and the percentage of the goal completed.

> The compatible devices are set up in **Health Sources**.
> You can connect to your wireless scale from a weight management goal in the **Goals** tab.
> Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

**Figure 2: Weight management data in table format**

<table>
<thead>
<tr>
<th>Date</th>
<th>Weight</th>
<th>Comments</th>
<th>Source</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/29/2014</td>
<td>140 lbs</td>
<td>no shoes</td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>8/30/2014</td>
<td>135 lbs</td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 3: Weight management data in graph format**

**Only data that you enter into FollowMyHealth manually or automatically using a connected scale is used for this goal. This is to prevent the results from being skewed by measurements from other scales such as weight taken during a visit to your health care provider.**
Monitor weight goal

The monitor weight goal is used to monitor weight changes in patients with congestive heart failure.

The following list includes best practices when managing your monitor weight goals.

> Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the patient portal.
> Only weights from your compatible device or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
> The graph data point tooltip includes the reading, body mass index (BMI), patient-entered comments, and any broken rules.
> The compatible devices are set up through Health Sources.
> You can connect to your compatible device from a monitor weight goal on the Goals tab.
Every reading added on the Vitals tab in My Health is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

**Figure 4: Monitor weight data in graph format**

![Graph showing weight data over 5 days](image)

**Figure 5: Monitor weight data in table format**

![Table showing weight data over 5 days](image)

**Monitor blood glucose goal**

The monitor blood glucose goal is used to monitor blood glucose levels for patients with diabetes. The following list includes best practices when managing your monitor blood glucose goals.
> Readings are entered manually from the goal or electronically with a compatible device that automatically sends the reading to patient portal.
> The graph data point tooltip includes the reading, date, time, tag, patient-entered comments, and any broken rules.
> The compatible devices are set up through Health Sources.
> You can connect to your compatible devices from a goal in the Goals tab.
If a blood glucose reading is added to the **Results** tab in **My Health** and the reading date is within the goal period, the reading is also added to the **Goals** tab.

**Figure 6: Monitor blood glucose data in graph format**

![Graph of blood glucose data](image-url)
# Monitor blood pressure goal

The monitor blood pressure goal is used to monitor blood pressure levels for patients with hypertension.

The following list includes best practices when managing your monitor blood pressure goals.

- Systolic and diastolic values are connected by a line in the graph view to indicate that the values are from the same reading. The top horizontal line is the systolic goal and the bottom horizontal line is the diastolic goal.
- Readings are entered manually or with a compatible device. The device automatically sends the reading to the patient portal.
- The graph data point tooltip includes the value, date, time, patient-entered comments, and any broken rules.
- The compatible devices are set up through Health Sources.
- You can connect to your compatible devices from a blood pressure goal in the Goals tab.

![Figure 7: Monitor blood glucose data in table format](image_url)

### Monitor Blood Glucose 3 times per day for 4 days

<table>
<thead>
<tr>
<th>Date</th>
<th>Glucose</th>
<th>Tag</th>
<th>Comments</th>
<th>Source</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/4/2014 8:00 PM</td>
<td>91 mg/dL</td>
<td></td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/4/2014 9:30 AM</td>
<td>27 mg/dL</td>
<td></td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/4/2014 9:15 AM</td>
<td>17 mg/dL</td>
<td>After activity</td>
<td>1 to 2 hours after meals</td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/4/2014 9:00 AM</td>
<td>21 mg/dL</td>
<td></td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/4/2014 7:00 AM</td>
<td>43 mg/dL</td>
<td></td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
</tbody>
</table>
If you add a blood pressure reading to the **Vitals** tab in **My Health**, the reading is automatically added to the **Goals** tab provided the date of the measurement is within the goal period.

**Figure 8: Monitor blood pressure data in graph format**

**Figure 9: Monitor blood pressure data in table format**

**Manage your goals**

**View goals and readings**

You must accept a new goal to add the goal to the **Goals** tab.

**Before you begin**

You must have at least 1 goal for the **Goals** tab to display. The number of unaccepted goals is displayed on the **Goals** tab until you accept or decline the new goals.
Click My Health > Goals. Alternatively, you can click the goal notification in Action Center to access the Goals tab. The Goals tab is displayed.

There are 5 different states for a goal, new, active, completed, declined, or cancelled. New goals must be accepted. Click Click here to accept the goal and begin collecting measurements. Click on a goal section header to see the goals in that state.

*Figure 10: Goals tab*

![Goals tab](image)

The Goals tab is displayed.

*Figure 11: Goal readings*

![Goal readings](image)

To change the goal display, click Graph or Table. You can switch between Graph and Table views.

To edit a reading from the table view, click 📊. To remove a reading on the table view, click ✗. The reading is removed from your universal health record (UHR) and no longer is displayed on the goal.

To restore a reading, go to My Account > Preferences > Restore Deleted Items.
Accept a new goal

You must accept a new goal to get started. By accepting the goal, you are consenting to share information related to the goal with the ordering provider and care team.

1. Open the Goals tab in either of the following ways.
   > Click My Health > Goals.
   > Click the new goal notification on Action Center.
   The Goals tab is displayed.
2. Click Click here to view the new goal.
   Goals opens.
3. (Optional) Select the preferred communication method that you want receive your reminder from.
   > Select Email to get your reminder through an email message. Click Change if you want to update your email address. Email is the default communication method.
   > Select Text Message to get your reminder through a text message. Click Change or Remove if you want to add an alternative cell phone number. This method can only be used if the cell phone number is verified.
   If Email or Text Message are not selected in My Reminders when Continue is clicked, default reminders are not created.
   If Email or Text Message is selected in My Reminders when Continue is clicked, the default reminders are created.

   **Note:** The goals are not accepted or processed until Continue is clicked on My Reminders.

4. Select Accept for the goals that you want to accept.
If you accept multiple goals of the same type, **Duplicate Goals** opens.

**Figure 12: Duplicate Goals**

The message lists the duplicate goals and you must select the goal that you want to follow and click **Continue**. The goals that you do not select are declined.

5. Click **Continue**.
   The default reminder created by the application is listed. You can accept, edit, or delete the reminder. The accepted reminders are displayed in the table on **My Reminders** in alphabetical order.

6. Click **Continue** to continue to accept the default goal reminder and the goal.
   The **Active Goals** tab is displayed and includes the goals that you accepted. If you have any active goals of the same type, then the active goal is marked complete and given an end date of today. The new goal of the same type replaces the active goal that is completed. All reminders are also removed for the completed goal.

**Results of this task**
The ordering provider is sent a notification that the goal was accepted.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.
Chapter 10 My Health

What to do next
Connect to your wireless device, such as a wireless scale, blood pressure monitor, or blood glucose meter, or manually enter additional readings, as needed, if you do not have a wireless device.

Reminders can be changed at any time by clicking My Reminders from the Goals tab or by clicking Edit next My Reminders in Notification Preferences. Default goal reminders can only be edited or deleted when accepting the goal. You cannot undo an edited or deleted default goal reminder.

Add a reading
You must accept a goal before you can enter a reading.

The goal includes the rules set by your provider. If the rules are broken, your provider receives a notification after your reading is entered. You also receive a goal alert in Action Center if your reading violates 1 or more rules set by your provider.

1. For the first reading, click enter your current reading or connect to a wireless device to have readings automatically sent to the patient portal.
   For example, if you are entering a weight measurement, click enter your current weight or use a compatible device to enter your reading electronically.
   If this is not the first reading, a graph is displayed with your progress. Click Add a Reading to add an additional reading.

   **Figure 13: Adding a weight reading**

   A window opens where you can add your reading.
   The following example shows the Add Weight Vital window that is displayed when you add a weight reading.
2. Click **Save**.

**Results of this task**
The reading is saved in the patient portal and analyzed. A message is displayed as your measurements are analyzed.

If the reading did not break a rule, a message is displayed indicating that analysis is complete and no issues were found.

The goal is updated and a graph is displayed. Additional information about each reading is available in a tooltip when you point to each data point.

**Note:** Only readings that fall within the start and end date are included on the goal.
Chapter 10 My Health

If a reading is outside the parameters set by your provider, a goal alert is displayed after the reading is entered.

**Figure 14: Goal alert for broken rule**

Weight of 165.9 lbs on 6/12/2014 at 11:05 AM triggered the following alert:
Weight increased by 3 lbs in 1 day
An alert is also flagged on the graph and table view.

**Figure 15: Goal violation on graph view**

**Figure 16: Goal violation on table view**
Chapter 10 My Health

What to do next
Enter additional manual readings or connect to a wireless device for measurements to continue capturing readings and working to accomplish your goal.

Decline a new goal
You can decline a goal when it is new or active.

1. Open the Goals tab in either of the following ways.
   > Click My Health > Goals.
   > Click the new goal notification on Action Center to access the Goals tab.
   The Goals tab is displayed.
2. Click Click here to view the new goal.
   Goals opens.
3. Select Decline for the goals you want to decline.
4. Click Continue.
   The Declined Goals tab is displayed and the declined goal is listed.

Results of this task
The ordering provider is sent a notification that the goal was declined.

The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

Decline an active goal
You can decline a new or active goal that has been accepted and is listed in Active Goals on the Goals tab.

1. Click My Health > Goals.
   The Goals tab is displayed and Active Goals opens.
2. Click decline this goal.
   Decline Goal opens.
3. Click Decline Goal.
   When you decline the goal, the goal is listed under Declined Goals with the date that the goal was declined. There are no readings displayed for declined goals.

Results of this task
The ordering provider is sent a notification if you decline the goal.
The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

**Access Health Sources from a goal**

You can access **Health Sources** from your active goals in the **Goals** tab.

**Before you begin**

The **Goals** tab is only displayed if your provider has enabled the goals feature.

**Health Sources** is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your patient portal account. When you use the devices to take vital sign measurements for your goal that your provider set for you, the readings are viewable in the patient portal.

1. From the **Home** tab, click **My Health**.
   **My Health** opens.

2. Click the **Goals** tab.
   **Goals** opens.

3. Expand **Active Goals**.

4. From an active goal, click **Health Sources**.
   **My Connections** opens and **With Devices and Apps through Health Sources** expands.
Results of this task
You have accessed Health Sources.

What to do next
View readings, remove connections, add connections, learn more about health sources, or access product websites for devices.

Notifications
Notifications are sent for goal reminders, new goals, completed goals, appointment reminders, personal health record (PHR) updates, and other health-related reminders.

You can set up goal reminders when you accept a goal or from My Reminders. These reminders can be changed at any time.
You or an authorized individual (proxy) can receive goal messages through email and text message. When a provider creates a new goal for you, you can receive an email or text message, and email message is sent to your **Inbox** in the patient portal.

**Figure 17: New goal message in Inbox**
A new goal action item is also displayed under the Action Center.

**Figure 18: New goal action item under Action Center**

A goal alert is a type of notification that is displayed in Action Center if your reading violates 1 or more rules set by your provider. You or an authorized individual can receive additional goal alerts through email and text message. Goal alerts are also displayed as banners on the Goals tab when you manually enter readings.

**Figure 19: Goal alerts are displayed in Action Center**
You can configure the notification method when you add the goal reminder, on the Notification Preferences tab, or when you accepting a goal from the Goals window. You cannot turn off notifications for broken rules from displaying in Action Center.

Add a reminder

You can add a reminder to notify you when to take measurements, when your goal ends, or other customized reminders. These can be sent through emails or text messages.

You can also accept default reminders during the goal acceptance process.

1. Click My Health > Goals.
The Goals tab is displayed.

2. Click My Reminders.
My Reminders opens.

   If you have reminders, a table lists the reminders. If you do not have reminders, only the communication method settings are displayed.

   Note: You can also open My Reminders when you click Edit in the My Reminders section in My Account > Preferences > Notification Preferences.

3. Select the communication method for receiving your reminder.
   > Select Send email reminders to get your reminder through an email message. Click Change to update your email address. Send email reminders is selected by default.
   > Select Send text message reminders to get your reminder through a text message. Click Add a cell phone number to add an alternative cell phone number. This method can be used only after the cell phone number is verified.
   > Click Edit and remove if you already have a cell phone number added and want to edit or remove the number.

4. Click Add Reminder.
Reminder opens.

5. For Name, enter a name for the reminder.

6. For Type, select how often you want to receive the reminder.
Valid values are:
   > Once
   > Daily (default)
   > Weekly
   > Monthly
   > Yearly
Chapter 10 My Health

The type selected determines the **Frequency** preferences that are displayed.

7. **From This is a reminder to**, select the reason for the reminder.
   Valid values are:
   - Do something (default)
   - Take weight
   - Take blood pressure
   - Take blood glucose

8. **For Reminder Text**, enter the information that you want to see in the reminder. This is the text that is emailed or text messaged to the number provided.

9. **For Frequency**, enter how often, the day of week, and the time of day that you want the reminder to occur.
   The reminder type selected in step 6 determines the **Frequency** preferences that are displayed.

   **Daily**

   The value must be a whole number that is greater than 0 (zero) and less than or equal to 365. The default is 1 day.
   The time of day must be valid and set according to your time zone. The default time is now.
   At least 1 day of the week must be selected.

   **Monthly**

   Select an exact day of the month, for example the 15th of each month. Or, select a relative day of the month, for example, the last Sunday of the month.
   If you select an exact day of the month, the numeric value is displayed and the current day is the default. This value must be a valid day of the month with a value between 1 and 31. When the reminder is scheduled to a date that the month does not reach, the last day of the month is changed to the last day of that month. For example, if you select 31 and the month is June, the number is changed to 30. If the reminder occurs on the last day of the month, set the value to 31 and the application changes the value to the last day of the month when scheduling the reminder.
   If you select The, the other day boxes are replaced with the day of the week and the day within the month it counts for. For example, The Third Tuesday. The value that is entered in the month box must be between 1 and 12.
   The time of day must be valid and set according to your time zone. The default time is now.

   **Weekly**

   The value must be a whole number that is greater than 0 (zero) and less than or equal to 52. The default is 1 week.
The time of day must be valid and set according to your time zone. The default time is now. At least 1 day of the week must be selected.

Yearly

The value must be a whole number that is greater than 0 and less than or equal to 20. The default is 1 year.

Month and day defaults to today. The month list includes all 12 months. The day must be a whole number between 1 and the number of days in the selected month. Do not enter more than 31.

Once

The date must be in the future. The default is today's date.

10. For **Duration**, select the start and end date from the calendar tool.
    - The default start is the current date.
    - The duration type has the following valid values:
      - **No end date** (default)
      - **End by**
      - **End after**

    If **End by** is selected, a date box is displayed. You must enter the end date with the calendar tool.
    If **End after** is selected, an occurrences box is displayed. You must enter the number of times that you want the reminder to occur. The number must be a whole number greater than 0 (zero).

11. Click **Set Reminder**.
    - When you click **Set Reminder**, a validation process is started. If there are no validation errors, the reminder is saved.

    **Important:** If you click close before you click **Set Reminder**, **My Reminders** closes and your changes are not saved.

Results of this task

The reminder is displayed in the table on **My Reminders** in alphabetical order.
Delete a reminder from My Reminders

You can delete a reminder from My Reminders.

You can also delete default reminders during the goal acceptance process.

1. Click My Health > Goals.  
The Goals tab is displayed.

You can also view reminders from Notification Preferences.

2. Click My Reminders.  
   My Reminders opens and the reminders are listed.

3. Click the reminder that you want to delete.  
The reminder details are displayed.

4. Click Delete.  
   Confirm Delete opens.

5. Click Delete.

Results of this task

You have deleted the reminder and it is removed from My Reminders.

Edit a reminder from My Reminders

You might want to change a reminder. In this scenario, you can edit the reminder from My Reminders.

1. Click My Health > Goals.  
The Goals tab is displayed.

2. Click My Reminders.  
   My Reminders opens, and the reminders are listed.

3. Click the reminder that you want to edit.  
The reminder details are displayed.

4. Enter the changes for the reminder.

5. Click Set Reminder.  
The reminder closes and the reminders list is updated to reflect your changes.

Results of this task

You have edited the reminder.
Chapter 11

My Info

The **My Info** tab contains your demographic information.

From the **Demographics** tab, you can manage your basic information, insurance, emergency contacts, and the person who is responsible for your account.

**Demographics**

**Demographics** includes 4 tabs, **General, Emergency Contact, Responsible Party**, and **Insurance**.

**Edit demographics**

The **General** tab includes **Basic Information, Social Information, and Preferred Pharmacy**.

1. From **My Info**, select **Demographics**.
   **Demographics** opens.

2. From **Basic Information**, update basic information or add information that is not automatically filled.
   Some of the information in **Basic Information**, such as contact information, name, date of birth, and address might be filled based on the information that your healthcare organization already has recorded for you.
   The email address that is listed in **Basic Information** is also listed in the **Notification Preferences** tab, your FMH Secure Sign In preferences, and the **Goals** tab in **My Health**. If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address under **Basic Information**, the change is also made to the email address that is listed under these other locations.

   **Note:** The **Goals** tab is not displayed in **My Health** unless your provider has the goals feature enabled and you have accepted a goal.

3. From **Social Information**, select your race, ethnicity, and language.
   The federal government mandates the healthcare organization to collect this information. Select **Declined to Answer** if you do not want to provide this information.
4. Click **Save**.  
   **Save Successful** opens.

5. Click **OK**.

**Edit your preferred pharmacy**

Follow the steps in this task to edit your preferred pharmacy from the **My Info** tab.

You can also edit your preferred pharmacy from **My Health > Medications**.

1. From **My Info**, select **Demographics**.  
   **Demographics** opens.

2. From the **General** tab, under **Preferred Pharmacy**, click **Edit**.

3. For **Search**, enter the ZIP Code area that you want to search.  
   Your ZIP Code is displayed as the default value when **Pharmacy Search** opens. You can change the value.

4. For **Distance in Miles**, select the proximity in miles that you want the application to search.  
   The patient portal searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.

5. Select a pharmacy and click **Connect**.  
   The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy**.

**Edit emergency contact**

The **Emergency Contact** tab lists the person that your healthcare organization should contact if there is an emergency when you are with your healthcare provider.

1. From **My Info**, select **Demographics**.  
   **Demographics** opens.

2. Click the **Emergency Contact** tab.  
   The **Emergency Contact** tab is displayed.

3. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information.
Some of the information in Emergency Contact might be filled based on the information that your healthcare organization has recorded for you.

4. Click Save.
   Save Successful opens.

5. Click OK.

### Edit responsible party

The Responsible Party tab indicates the person who is responsible for any charges incurred with the healthcare organization. This person is also referred to as the guarantor.

1. From My Info, select Demographics.
   Demographics opens.

2. Click the Responsible Party tab.
   The Responsible Party tab is displayed.

3. Enter information in Name, Contact Information, and Address, or update the existing information.
   Some of the information in Responsible Party might be filled based on the information that your healthcare organization already has recorded for you.

4. Click Save.
   Save Successful opens.

5. Click OK.

### Edit insurance information

The Insurance tab lists your primary, secondary, and tertiary insurance information.

1. From My Info, select Demographics.
   Demographics opens.

2. Click the Insurance tab.
   The Insurance Information tab is displayed.

3. Enter information in Name, Contact Information, and Address, or update the existing information for each section, Primary, Secondary, and Tertiary.
   Some of the information in Insurance might be filled, based on the information your healthcare organization already has recorded about you.

4. Click Save.
Chapter 11 My Info

Save Successful opens.

5. Click OK.
Index

2-Step Verification
  58
  adding
  58
  turning off 59

A

accessibility preferences
  setting
  63
account preferences
  activity history
  55
  deleting your universal health record account
  64
  display
  55
  notification
  55
  restoring deleted items
  55
  settings
  55
  sign in
  55
action center
  69
allergies
  adding
  143
alternative sign in
  adding
  56
App Center
  applications
  84
  Blue Button
  90

App Center (continued)
Health Journal
  86
  installing applications
  85
Know My Health
  93
MedlinePlus
  93
My Charts
  88
  single sign on, SSO
  93
applications
Blood Sugar
  entering a blood sugar reading
  91
Blue Button
  downloading health data
  90
Health Journal
  86
iHealth
  101
Know My Health
  93
My Charts
  88
  setting up an iHealth connection
  101
  single sign on, SSO
  93
Telcare Blood Glucose Meter
  102
Withings
  setting up your application
  102
Index

appointment
  checking in 73
appointment reminders 60
appointments
  cancelling 82
  direct scheduling 77
  other appointments
    viewing 83
  past appointments
    viewing 83
  requesting 74
  rescheduling 82
  upcoming appointments
    viewing 80
authorized individual 51

B
billing
  charges 84
  making a payment 84

C
chart
  searching, viewing 153
check-in reminders 60
conditions (continued)
  family health conditions
    adding 138
  as an authorized individual 138
  personal health condition
    adding 139
  surgical history
    adding 137

D
demographics
  editing 179
  email, address, preferred pharmacy, 179
devices
  iHealth Labs 103
  Telcare 103
  Withings 103
display preferences
  setting 63
documents
  adding 153

E
e-mail
  composing 131
  folder 132
eergency contact
  editing 180
eVisits 107
eVisits (continued)
requesting
  from Inbox 107
  from Providers 121

goals (continued)
blood pressure 161
broken order rule 166
changing your cell phone number 164
changing your email address 164
default goal reminders
  accepting 164
default goal reminders
  declining 170

F

FMH Secure Sign In
2-Step Verification 58–59
creating 9
editing preferences
  notifications 57
  password 58
existing account
  signing in with FMH Secure Sign In 31
  managing 57
  preferences 57
  signing in 9

G

goal readings
  deleting 162
  viewing 162

goals
  active goal
    declining 170
  adding a reading 166
  analyzing reading 166
  blood glucose 158

H

Health Journal
  adding a journal entry 86
  deleting a journal entry 86
  editing a journal entry 86
  printing a journal entry 86
Index

Health Journal (continued)
  viewing a journal entry 86
Health Sources 94
  accessing from Goals 97, 171
  accessing from My Account 96
  accessing from the Home tab 96
  connecting, disconnecting 99
iHealth 101
  setting up a Telcare blood glucose meter 102
  Telcare Blood Glucose Meter 102
  Withings 102
health summary 69
health summary documents
  exporting, transmitting, downloading 135
  importing 136
Home tab
  action center 69
  activities 69
  applications 69
  appointments 69, 72
  billing 69
  health summary 69
  messages 69
  recent activity 71
iHealth Labs 103
immunizations
  adding 145
  emailing, printing, faxing 148
  viewing 146
  viewing CDC immunization schedules 147
  viewing vaccine information sheets 147
inbox 131
inbox folders
  creating, editing 132
insurance
  editing 181
medications
  adding 140
  renewal requesting 142
My Account 43
  account preferences
    managing 55
  activity history log
    viewing 65
  billing 52
    ask a billing question from Billing 52
My Account (continued)
billing (continued)
  ask a billing question from Compose
    Email
      52
  managing
    paid invoices
      51
    patient responsibility
      51
    pending with insurance
      51
  paying your bill
      54
  paying your bill from Billing
      54
  paying your bill from Home tab
      55
display preferences
      63
notification preferences
      60
preferences
      63
  restoring deleted items
      65
support
      66
user manual
      66
My Charts
  adding information
      88
  deleting information
      88
  printing
      88
  viewing
      88
My Connections (continued)
authorized individual
  adding an authorized individual to access your account
      51
  editing clinic settings
      49
  managing
    editing
      43
    visualizing
      43
  providers
    viewing
      49
My Health
  133
  allergies
      143
care team list
  adding a provider
      134
  deleting a provider
      134
  editing a provider
      134
chart
      153
conditions, problems
      136–138
documents
      152–153
goals
      154
health summary
      135–136
immunizations
      144–148
medications
      140–142
pharmacy
      140
results
      149–150
### Index

| Results (continued) | Viewing | 150 |
| ROI, release of information | Renewing | 11 |

### S

**Security**
- 2-Step Verification | 58–59
- FMH Secure Sign In | 59

**Setting up notification preferences** | 60

**Sign-in**
- Adding alternative sign-in methods | 56
  - Existing account
    - Adding a connection with an email invitation | 35
    - Authorized individual
      - Connecting your existing account to another account | 37
    - Connecting | 35
    - Signing in with alternative method | 33
    - Signing in with FMH Secure Sign In | 31
  - FMH Secure Sign In | 9
    - 2-Step Verification | 58
    - Editing preferences | 57–58
    - Managing | 57
    - Notifications | 57
    - Password | 58

**Sign-in (continued)**
- FMH Secure Sign In (continued) preferences | 57
- Managing sign-in methods | 55
  - New account
    - Authorized individual
      - Connecting to another account | 22
    - Creating an account through email invitation | 11
    - Creating an account without an email invitation | 15
    - Getting started | 11
  - Signing in to a third party | 93
  - Static toolbar | 41
    - My Account | 43
    - Searching your health record | 42

### T

- Technical support information | 66
  - Help | 66
  - User manual | 66
  - Video walkthrough | 66

**Telcare** | 103

### U

- Units of measure preferences
  - Setting | 63
- Updates to health record | 60
Index

V
vital signs adding 152

W
Withings 103