



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

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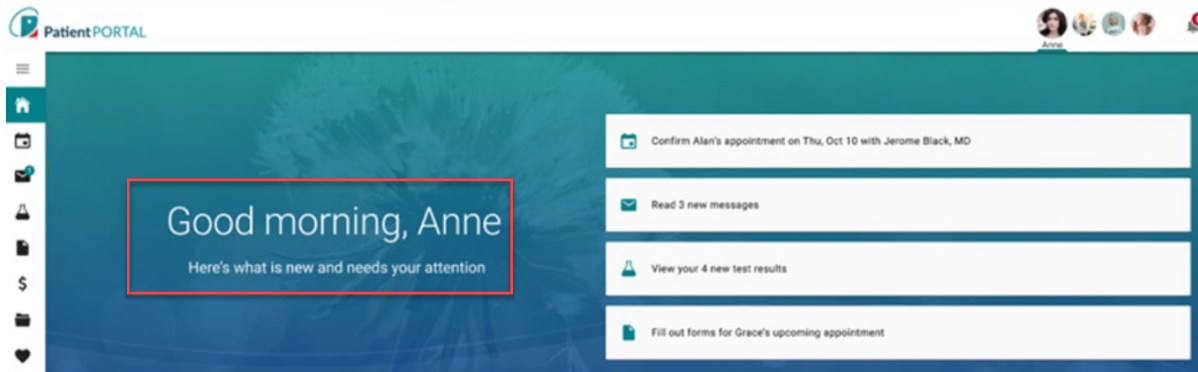
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Home Page

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

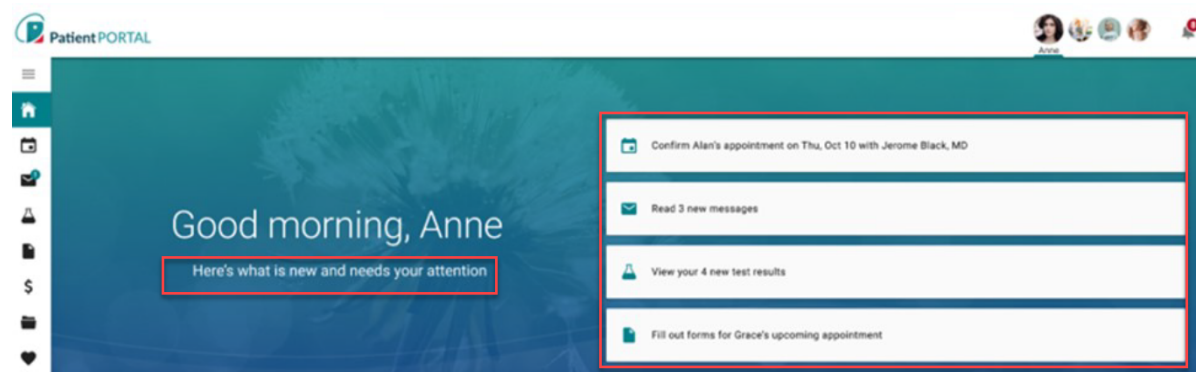
Greeting Over Image

The personalized greetings and background images change, depending on the time of day of log in.



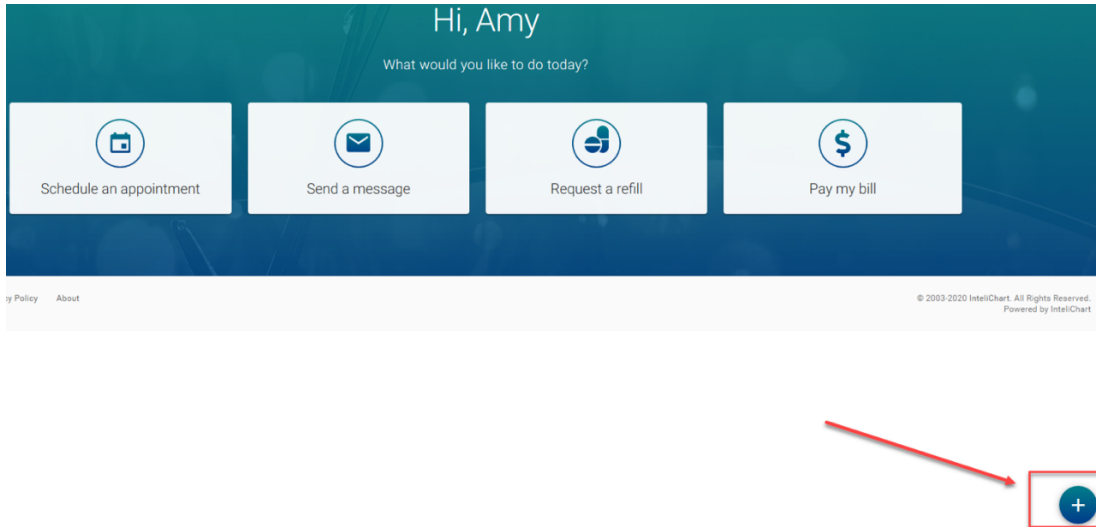
Action Tiles

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



Floating Action Button

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



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

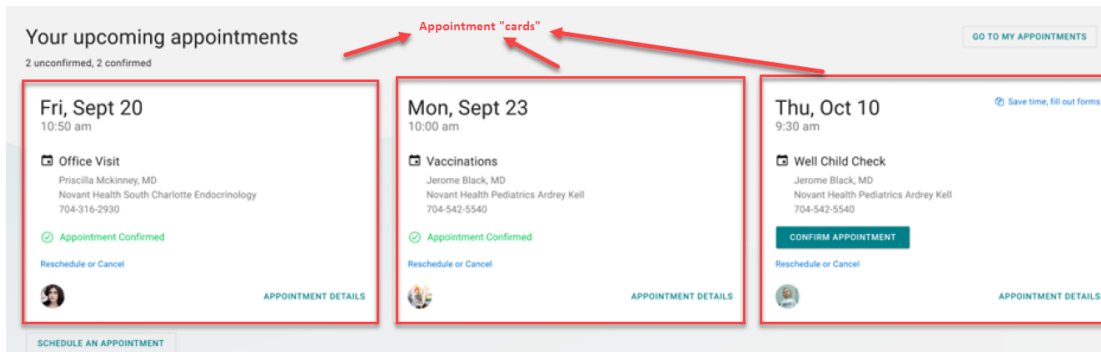
- Pay my bill: Navigates user to the bill pay page
- Request a refill: Opens request a refill workflow
- Send a message: Opens compose new message workflow
- Make an appointment: Opens make an appointment workflow



Appointments

Upcoming Appointments

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

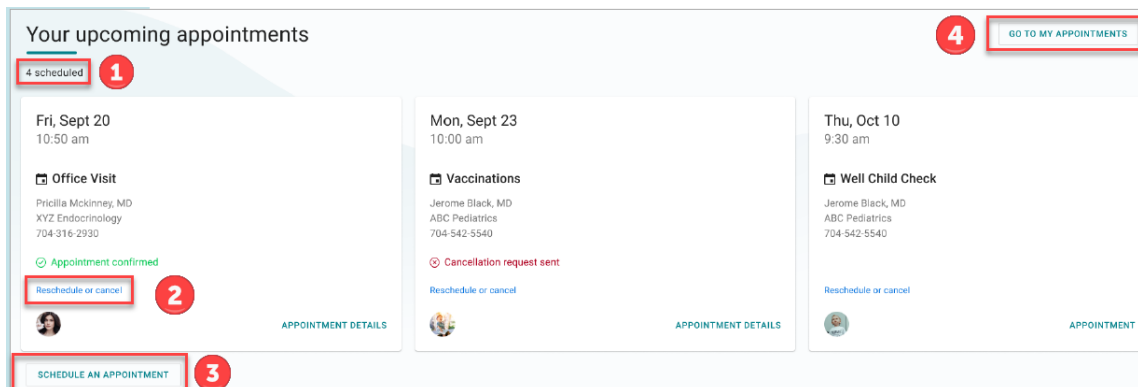


There may be more cards than can be seen on the screen. Here’s how to view them:

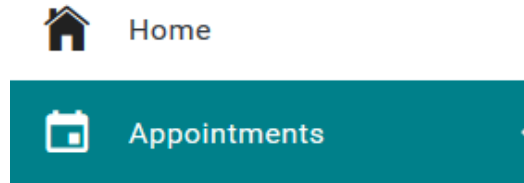
- Scroll by swiping left on a touch screen
- Click and drag on the space with a mouse
- When you hover the cards, two floating buttons appear with arrows. Click on the arrows to scroll the cards left or right.

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

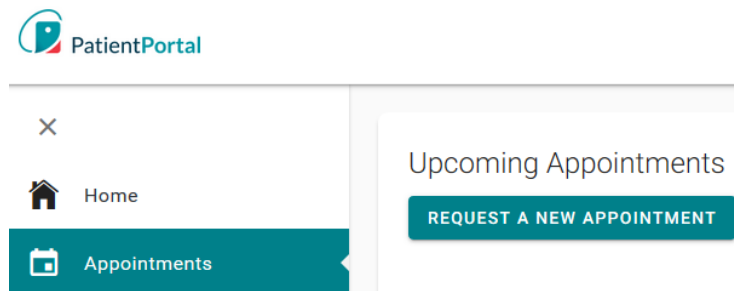
1. Identify the total scheduled appointments
2. Request to reschedule or cancel an appointment
3. Schedule an appointment by selecting **SCHEDULE AN APPOINTMENT**
4. Select the **GO TO MY APPOINTMENTS** to see all appointments



Appointment Request



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



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

Request to Reschedule an Appointment

To request to reschedule an upcoming appointment, on Appointments page, do the following:

- Click **Reschedule**. Disclaimer displays. Click **CONTINUE**
- Provide all the required information for rescheduling an appointment

Request to Cancel an Appointment

To request to cancel an upcoming appointment, on Appointments page, do the following:

- Click **Cancel**. Disclaimer displays. Click **CONTINUE**.
- Provide all the required information

Messages

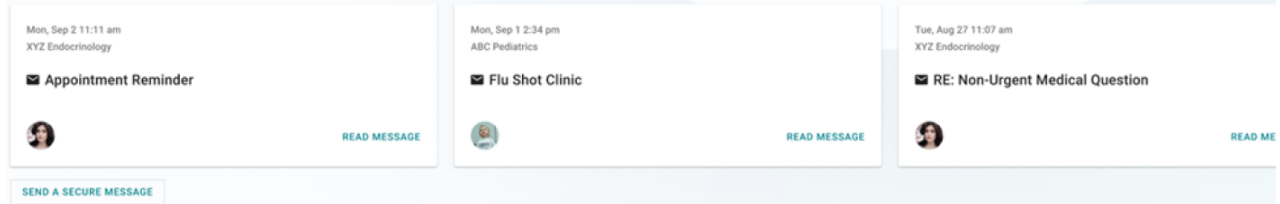
Viewing New Messages

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

Messages from your Care Team

[GO TO MY MESSAGES](#)

3 new messages in the past 30 days



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

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

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

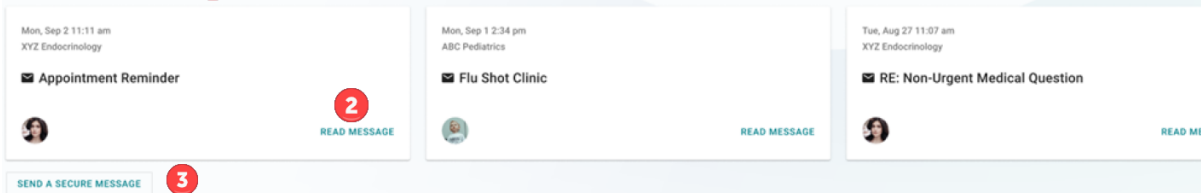
The user can do the following under the **Messages from your Care Team** section:

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

Messages from your Care Team

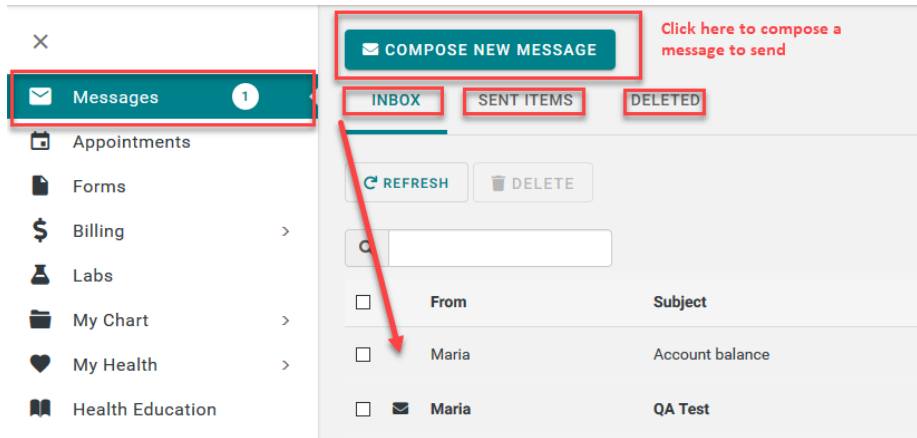
[4 GO TO MY MESSAGES](#)

3 new messages in the past 30 days **1**



Compose New Message

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



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

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

Compose new message ×

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


On behalf of: Billy boy test **3**

Practice: Ballantyne Family Office **4**

Location: Ballantyne Commons-IC Test **5**

To: Clinical Team **6**

Subject: Request for nurse to call **7**

 **8**

B I U [Text formatting icons] **9**

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

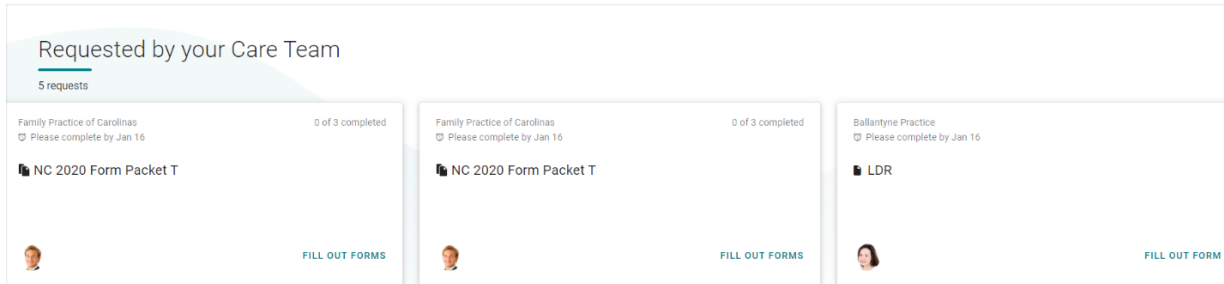
Characters: 921 **10**

CLOSE SEND MESSAGE

Forms

Forms-Requested by your Care Team

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

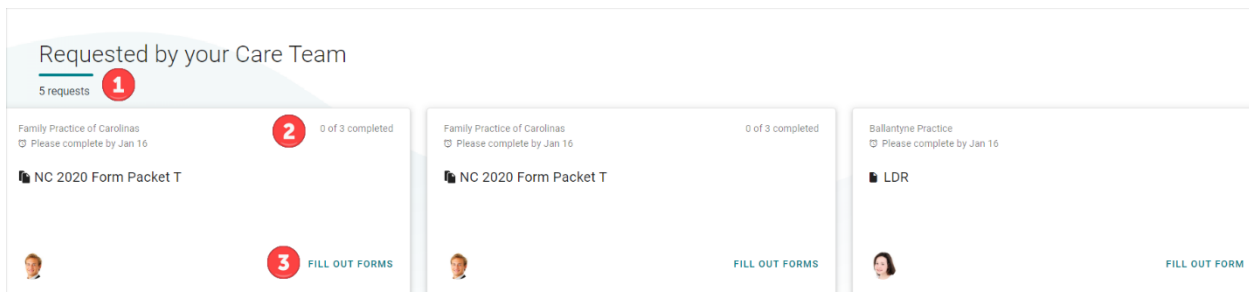


There may be more cards than can be seen on the screen. Here's how to view them:

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

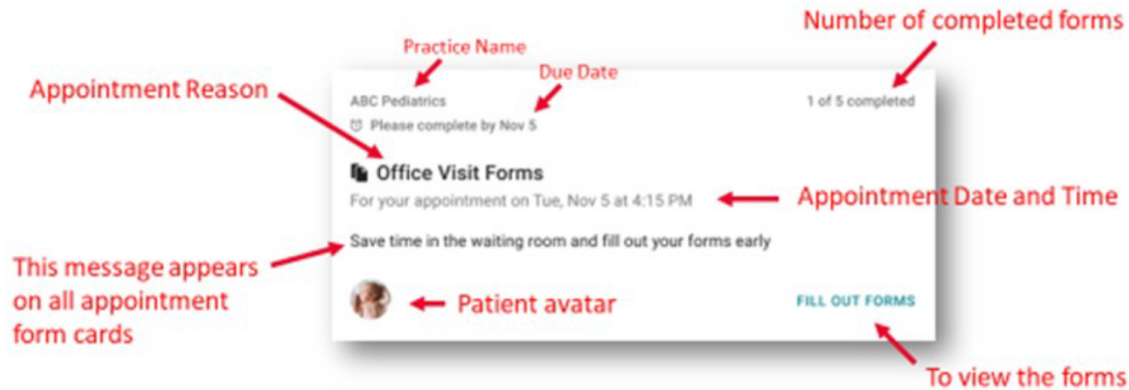
The patient can do the following under the **Requested by your Care Team** section:

- Identify the total requests
- Identify total of forms completed in a packet
- FILL OUT FORMS

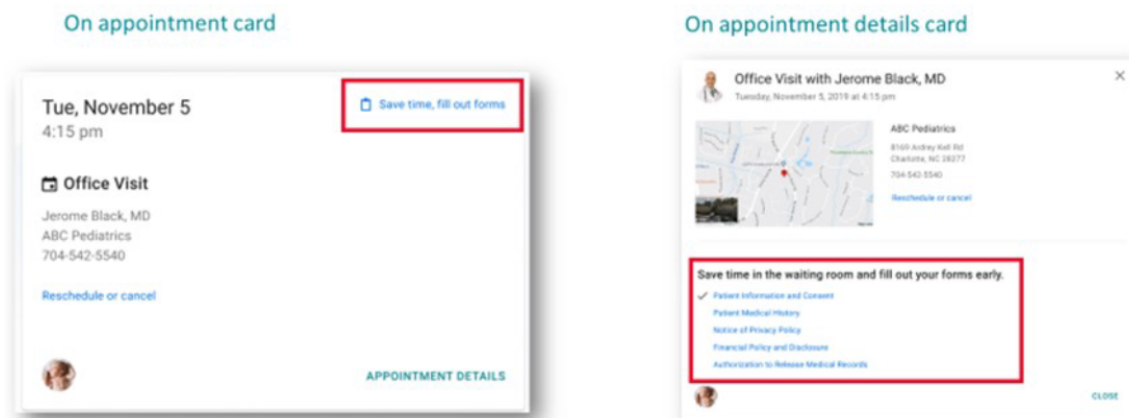


Appointment Form Card

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



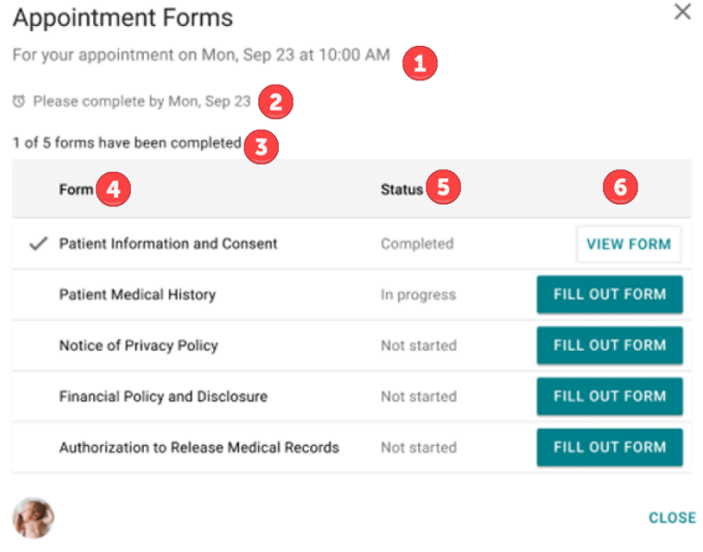
Other ways to access appointment forms:



Fill Out Forms

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

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




Appointment Forms ×

For your appointment on Mon, Sep 23 at 10:00 AM **1**

Please complete by Mon, Sep 23 **2**

1 of 5 forms have been completed **3**

Form 4	Status 5	6
✓ Patient Information and Consent	Completed	VIEW FORM
Patient Medical History	In progress	FILL OUT FORM
Notice of Privacy Policy	Not started	FILL OUT FORM
Financial Policy and Disclosure	Not started	FILL OUT FORM
Authorization to Release Medical Records	Not started	FILL OUT FORM

 CLOSE

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

Insurance

Insurance policies can be viewed by using the left-hand navigation and selecting **Insurance** under the header **Billing**.



\$ Billing >

Pay My Bill

Insurance

The patient can also send a message to report any changes or problems by clicking **Report a problem with this policy**.

Insurance on file for Amy testing name change ICtest

Aetna				
Name on Card	Amy ICtest	Policy Number	123456789	Plan Number
Copay Amount	\$0.00	Effective Date	11/1/2017	Expiration Date
Group Number		Phone Number	(888) 632-3862	

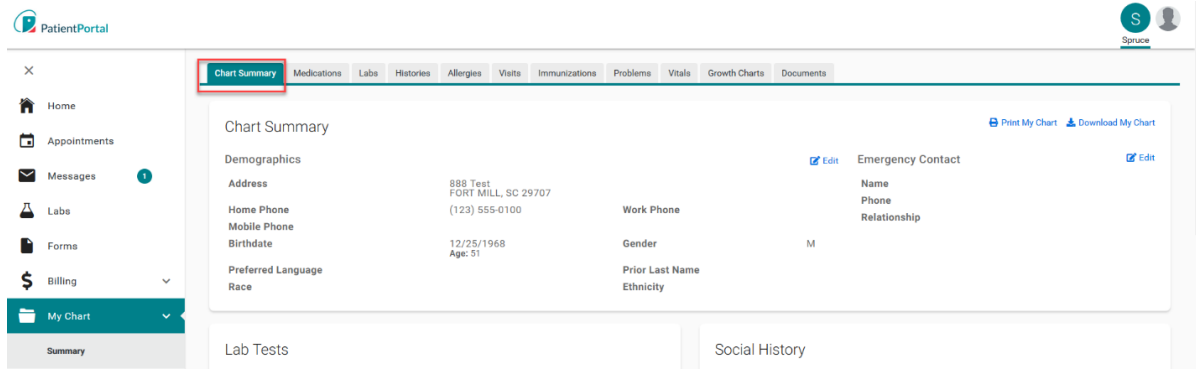
Click this link to send a message related to changes or issues with insurance coverage

[Report a problem with this policy.](#)

My Chart

My Chart-Chart Summary

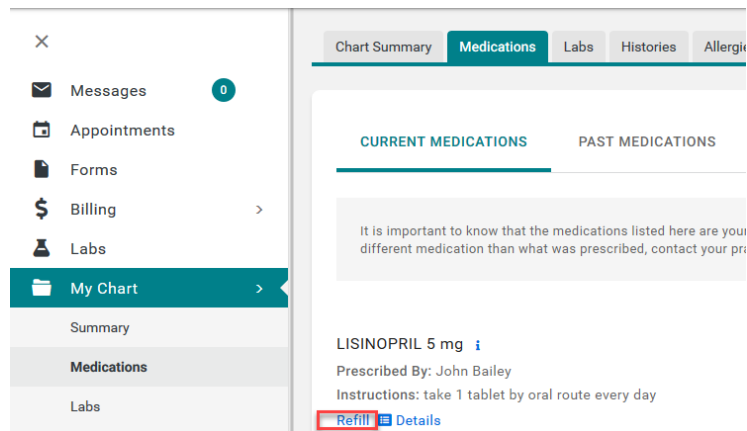
The **Chart Summary** page provides an overview of Demographics, Histories, Allergies, Visits, Medications, Problems, Vitals and Allergies. The most recent 5 records will display on each widget. To see any health record in more detail, click on the widget title or click on respective tab.



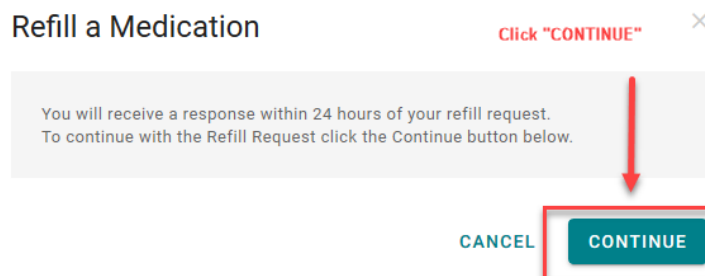
Request a Medication Refill

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

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



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



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

Refill a Medication ×

You are requesting a refill for LISINOPRIL 5 mg

Please select who

you want your request to be sent to:

Medication Refill Test

to:

Pharmacy:

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

[Add a Pharmacy](#)

CLOSE

SUBMIT

Add a Pharmacy

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

Click Add a pharmacy

Pharmacies

Show 10 entries

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

Showing 1 to 1 of 1 entries

Previous 1 Next

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

Add a Pharmacy:

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

×

SEARCH FOR PHARMACIES MANUALLY ADD A PHARMACY

Search term 1 Enter the Pharmacy name

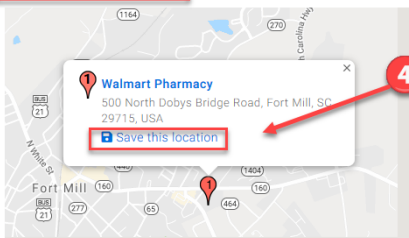
e.g. Walgreens or CVS

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

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

3 Click "SEARCH PHARMACIES"


SEARCH PHARMACIES



4 Click "Save this location" to add the pharmacy

Save this location

Your pharmacy was saved successfully displays.

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

Your pharmacy was saved successfully.

Manually Add a Pharmacy

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

Add a Pharmacy ×

SEARCH FOR PHARMACIES MANUALLY ADD A PHARMACY 1

Name Phone Website (optional)

Address 2

All of the following fields are optional.

Address Line 1 Address Line 2

City State Zip

Preferred Pharmacy

Would you like to make this your preferred pharmacy?

CANCEL SAVE 3

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

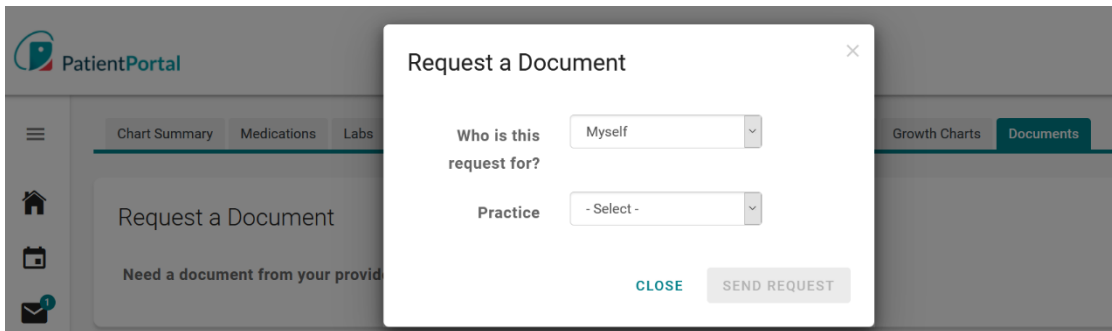
Pharmacies [Add a pharmacy](#)

Q Show 10 entries

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

Request a Document

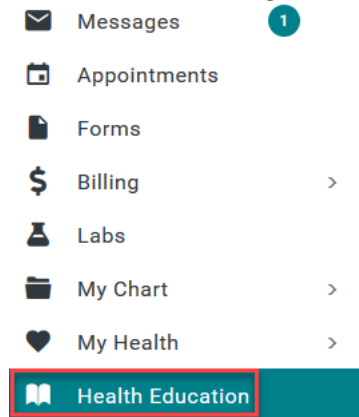
A patient may request a document from the practice/facility by clicking on Request a Document, complete dropdown sections, then click “Send Request”.



Health Education

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

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



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

Health Education

Search:

Show 5 entries

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

Showing 1 to 5 of 9 entries

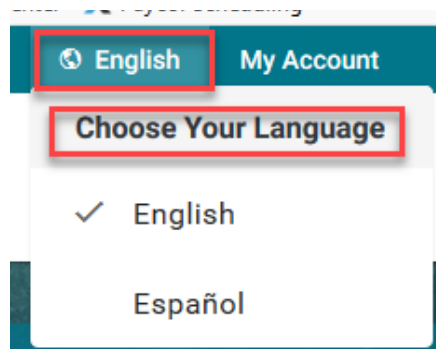
Previous 1 2 Next

Health Library powered by MedlinePlus

[SEARCH LIBRARY](#)

Language Selector

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



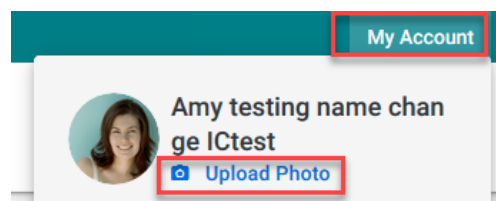
If the patient selects Spanish, a modal appears with a disclaimer that states the following in Spanish.

My Account

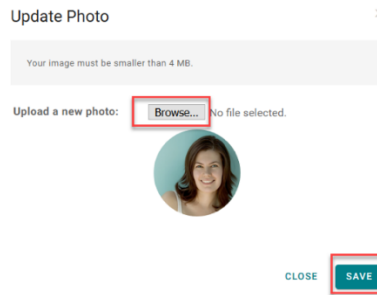
Change Profile Picture

The patient can personalize their IntelliChart® account by adding a picture to their profile. To change profile picture, do the following:

- Click **My Account** and select **Upload Photo**

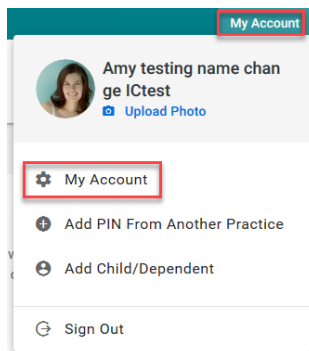


- Click **Browse** and choose the photo to upload as the profile picture; then click **SAVE**

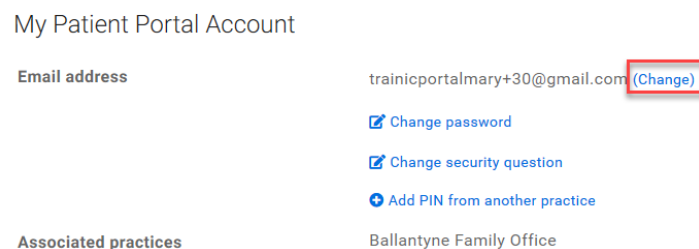


Change Password

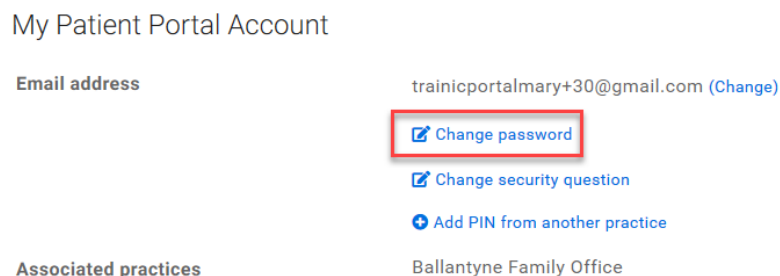
Through the My Account page, the patient can change their email and/or Password and view and add any Associated Practices. The **My Account** page allows patients to adjust login settings and notifications.



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



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



Change Security Question

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

My Patient Portal Account

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

- [Change password](#)
- [Change security question](#)
- [Add PIN from another practice](#)

Associated practices Ballantyne Family Office

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

Change security question

Security Question

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

Security Answer

Current password

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

Add PIN from Another Practice

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

My Patient Portal Account

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

- [Change password](#)
- [Change security question](#)
- [Add PIN from another practice](#)

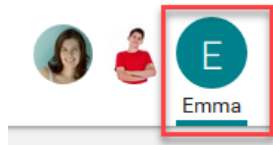
Associated practices Ballantyne Family Office

Proxy Associated Account

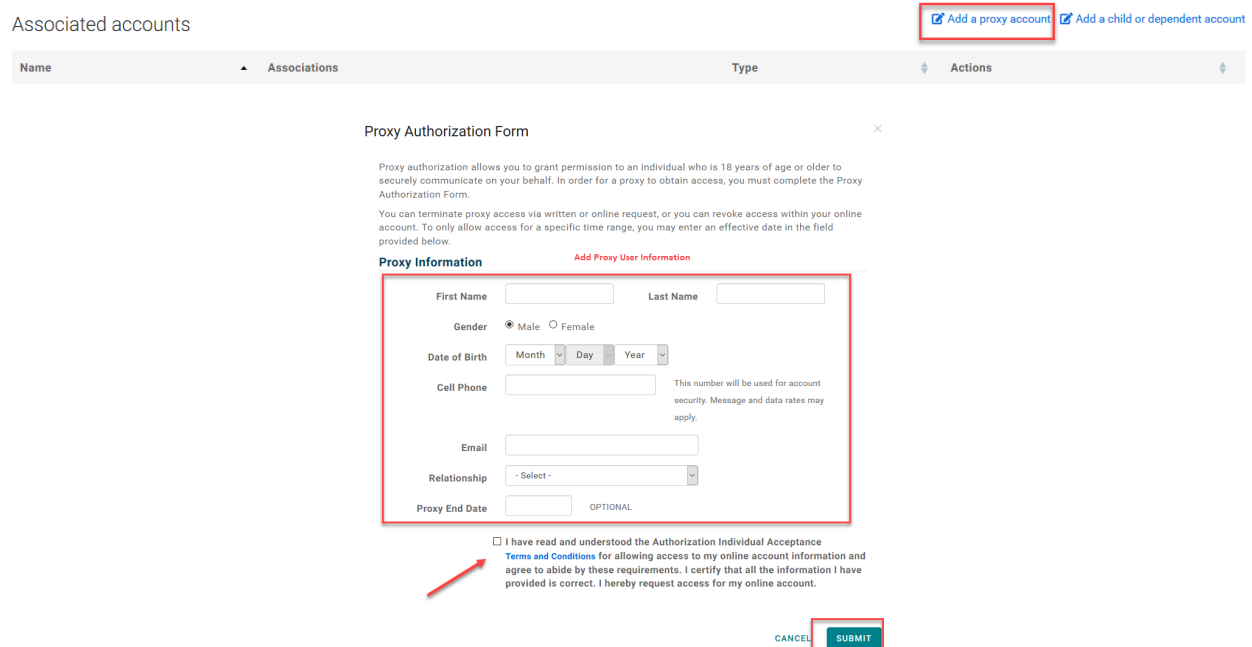
A Proxy User will display on the Patient Portal **My Account** page in the **Associated Accounts** section. The Patient Portal account user can remove a Proxy by clicking **Remove association**.



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



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



Associated accounts [Add a proxy account](#) [Add a child or dependent account](#)

Name	Associations	Type	Actions
stella Test		My Proxy	Remove association

Proxy Authorization Form

Proxy authorization allows you to grant permission to an individual who is 18 years of age or older to securely communicate on your behalf. In order for a proxy to obtain access, you must complete the Proxy Authorization Form.

You can terminate proxy access via written or online request, or you can revoke access within your online account. To only allow access for a specific time range, you may enter an effective date in the field provided below.

Proxy Information Add Proxy User Information

First Name Last Name

Gender Male Female

Date of Birth Month Day Year

Cell Phone This number will be used for account security. Message and data rates may apply.

Email

Relationship

Proxy End Date OPTIONAL

I have read and understood the Authorization Individual Acceptance [Terms and Conditions](#) for allowing access to my online account information and agree to abide by these requirements. I certify that all the information I have provided is correct. I hereby request access for my online account.

CANCEL

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

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