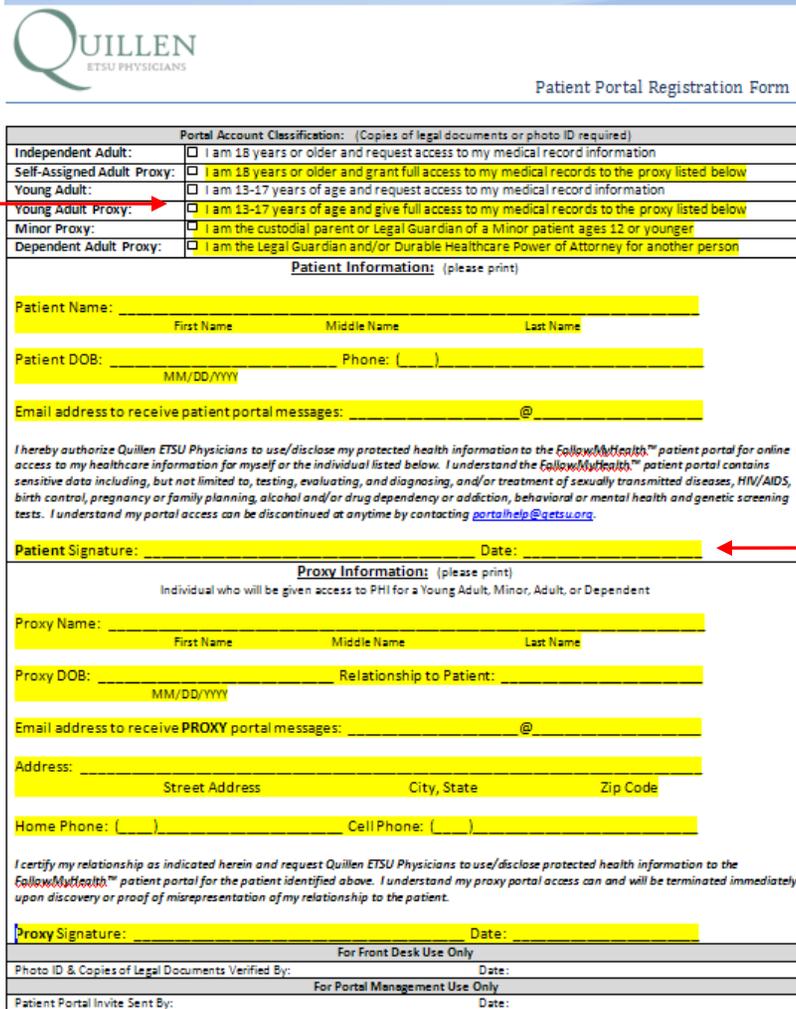


How to invite a Proxy to join the FollowMyHealth Patient Portal

Proxies are Parents or Legal Guardians of patients that have custody or power of attorney over a patient and can make and set appointments and view health information. Parents wanting their children to have a portal account and dependent adults who have caregivers who want portal accounts must be invited using these steps.

Step One: Give the patient and their proxy the Registration Form and have them fill out the following:



QUILLEN
ETSU PHYSICIANS

Patient Portal Registration Form

Portal Account Classification: (Copies of legal documents or photo ID required)

Independent Adult:	<input type="checkbox"/> I am 18 years or older and request access to my medical record information
Self-Assigned Adult Proxy:	<input type="checkbox"/> I am 18 years or older and grant full access to my medical records to the proxy listed below
Young Adult:	<input type="checkbox"/> I am 13-17 years of age and request access to my medical record information
Young Adult Proxy:	<input type="checkbox"/> I am 13-17 years of age and give full access to my medical records to the proxy listed below
Minor Proxy:	<input type="checkbox"/> I am the custodial parent or Legal Guardian of a Minor patient ages 12 or younger
Dependent Adult Proxy:	<input type="checkbox"/> I am the Legal Guardian and/or Durable Healthcare Power of Attorney for another person

Patient Information: (please print)

Patient Name: _____
First Name Middle Name Last Name

Patient DOB: _____ Phone: (____) _____
MM/DD/YYYY

Email address to receive patient portal messages: _____ @ _____

I hereby authorize Quillen ETSU Physicians to use/disclose my protected health information to the FollowMyHealth™ patient portal for online access to my healthcare information for myself or the individual listed below. I understand the FollowMyHealth™ patient portal contains sensitive data including, but not limited to, testing, evaluating, and diagnosing, and/or treatment of sexually transmitted diseases, HIV/AIDS, birth control, pregnancy or family planning, alcohol and/or drug dependency or addiction, behavioral or mental health and genetic screening tests. I understand my portal access can be discontinued at anytime by contacting portalhelp@qetsu.org.

Patient Signature: _____ Date: _____

Proxy Information: (please print)
Individual who will be given access to PHI for a Young Adult, Minor, Adult, or Dependent

Proxy Name: _____
First Name Middle Name Last Name

Proxy DOB: _____ Relationship to Patient: _____
MM/DD/YYYY

Email address to receive PROXY portal messages: _____ @ _____

Address: _____
Street Address City, State Zip Code

Home Phone: (____) _____ Cell Phone: (____) _____

I certify my relationship as indicated herein and request Quillen ETSU Physicians to use/disclose protected health information to the FollowMyHealth™ patient portal for the patient identified above. I understand my proxy portal access can and will be terminated immediately upon discovery or proof of misrepresentation of my relationship to the patient.

Proxy Signature: _____ Date: _____

For Front Desk Use Only

Photo ID & Copies of Legal Documents Verified By: _____ Date: _____

For Portal Management Use Only

Patient Portal Invite Sent By: _____ Date: _____

In the top section, have them check the option that applies for their particular proxy situation

The **patient's** information goes here, and the patient should sign on this line

The **proxy's** information goes here, and the proxy should sign on this line

Step Two: LOG-IN



Click on the FMH Dashboard icon on your desktop

<https://etsuphysicians.followmyhealth.com/Login/App/Dashboard?authproviders=0#/Options>



The landing page for the Patient Portal. At the top left, there are logos for East Tennessee State University and Quillen ETSU Physicians. The main heading is 'PATIENT PORTAL'. Below this is a photograph of a brick wall with the text 'JAMES H. QUILLEN College of Medicine EAST TENNESSEE STATE UNIVERSITY'. In the center, there are two large blue buttons: 'Log In' and 'Create an Account'. At the bottom right, there are links for 'Help' and 'Español'.

[New: Terms of Service \(updated June 25, 2014\)](#)

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[New: Privacy Policy \(updated June 25, 2014\)](#)

Step Two

Click "Registration."

Home

Registration

Providers

Registration

Invite Patient | Patient Queue (0) | Proxy | Merge Patients

Select Search Type

First Name:

Last Name:

Social Security Number:

Date of Birth:
<MM/dd/yyyy> .15

Search

[Advanced Search](#)

Search Results

Portal Member	Invite Patient	First Name	Last Name	DOB	Email	SSN	Phone	Organization
---------------	----------------	------------	-----------	-----	-------	-----	-------	--------------

0 Patient(s) Selected

2.2.3.0

Step Three

1. Click the "Proxy" tab.

The screenshot displays the 'Registration' application interface. On the left, there are two navigation buttons: 'Home' and 'Registration'. The main content area is titled 'Registration' and contains several tabs: 'Invite Patient', 'Patient Queue (0)', 'Proxy', and 'Merge Patients'. The 'Proxy' tab is currently selected, as indicated by a red arrow pointing to it. Below the tabs, there is a search section with the heading 'Select Search Type' and four radio button options: 'First Name:', 'Last Name:', 'Social Security Number:', and 'MRN:'. A 'Date of Birth:' field is also present with a date picker set to '15'. A 'Search' button and a link for 'Advanced Search' are located below these fields. To the right of the search section, there is a table with columns: 'Portal Member', 'Select Patient', 'First Name', 'Last Name', 'DOB', 'Email', 'SSN', 'Phone', and 'Organization'. Below the table, it shows '0 Patient(s) Selected' and buttons for 'View Pending Proxies' and 'Add Patient To Invite'. Further down, there are two sub-sections: 'Proxies To This Patient' and 'Proxies For Others'. The 'Proxies To This Patient' section contains a table with columns: 'Relationship', 'First Name', 'Last Name', 'Date of Birth', 'SSN', 'Email', 'Proxy Ac', and 'Health Record'. At the bottom right of the main content area, there are two buttons: 'Suspend Proxy' and 'Remove Proxy'.

Step Four

1. Enter the Patient's Information using the First Name, Last Name, Social Security Number, MRN(Medical Record Number), or Date of Birth.
2. Click "Search."

The screenshot shows the 'Registration' application interface. On the left, there are navigation buttons for 'Home' and 'Registration'. The main area is titled 'Registration' and contains several tabs: 'Invite Patient', 'Patient Queue (0)', 'Proxy', and 'Merge Patients'. The 'Invite Patient' tab is active, showing a search form on the left and a patient list on the right. The search form has fields for 'First Name', 'Last Name', 'Social Security Number', 'MRN', and 'Date of Birth', with a 'Search' button. A red callout box with the text '1. Enter the information here' has arrows pointing to the search fields. The patient list table has columns: 'Portal Member', 'Select Patient', 'First Name', 'Last Name', 'DOB', 'Email', 'SSN', 'Phone', and 'Org'. The table contains three rows of patient data. A red callout box with the text '2. Click "Search"' has an arrow pointing to the 'Search' button in the search form. Below the patient list, there are buttons for 'View Pending Proxies' and 'Add Patient To Invite'. At the bottom of the page, the version number '2.2.2.2' is displayed.

Home

Registration

Registration

Invite Patient Patient Queue (0) Proxy Merge Patients

Select Search Type

First Name:

Last Name:

Social Security Number:

MRN:

Date of Birth:

Search

Advanced Search

Add Healthcare Proxy

Portal Member	Select Patient	First Name	Last Name	DOB	Email	SSN	Phone	Org
	<input type="radio"/>	Emr11	Misys11(TRAINING)	12/12/1978		XXX-XX-7984		Noi
Has Invite	<input type="radio"/>	Emr12	Misys12	12/12/1948		XXX-XX-7654	(979) 879-8746	Noi
Has Invite	<input checked="" type="radio"/>	Stacey	Misys	9/3/2008		XXX-XX-4894	(813) 579-1254	Noi
	<input type="radio"/>	Priya	Misys(TRAINING)	4/3/1986		XXX-XX-6325		Noi

1 Patient(s) Selected

View Pending Proxies Add Patient To Invite

Proxies To This Patient Proxies For Others

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Proxy Ac	Health Record
--------------	------------	-----------	---------------	-----	-------	----------	---------------

Suspend Proxy Remove Proxy

2.2.2.2

Step Five

1. Locate the patient in the top right box. *If this patient already has proxies set up, they will appear in the lower box.*
2. Select **"Add Patient to Invite."** The patient's name will now appear in the Add Healthcare Proxy Box on the lower left side.

The screenshot shows a web application interface for patient registration. On the left, there are navigation buttons for 'Home' and 'Registration'. The main area is titled 'Registration' and contains several tabs: 'Invite Patient', 'Patient Queue (0)', 'Proxy', and 'Merge Patients'. The 'Proxy' tab is active, displaying a table of patients with columns for 'Portal Member', 'Select Patient', 'First Name', 'Last Name', 'DOB', 'Email', 'SSN', 'Phone', and 'Org'. The table lists three patients: Emr11 Misys11(TRAINING), Emr12 Misys12, and Stacey Misys. The 'Stacey Misys' row has its 'Select Patient' radio button selected. Below the table, there is a section for 'Proxies To This Patient' and 'Proxies For Others'. The 'Add Healthcare Proxy' section on the left shows 'Stacey Misys' listed. A red callout box with the text '1. Locate the Patient Account and click the radio button to select it' points to the selected radio button. Another red callout box with the text '2) Click "Add Patient To Invite"' points to the 'Add Patient To Invite' button. A third red callout box with the text 'This is where the patient name will be added' points to the 'Stacey Misys' entry in the 'Add Healthcare Proxy' section.

Portal Member	Select Patient	First Name	Last Name	DOB	Email	SSN	Phone	Org
Emr11	<input type="radio"/>	Emr11	Misys11(TRAINING)	12/12/1978		XXX-XX-7984		Not
Has Invite	<input type="radio"/>	Emr12	Misys12	12/12/1948		XXX-XX-7654	(979) 879-8746	Not
Has Invite	<input checked="" type="radio"/>	Stacey	Misys	9/3/2008		XXX-XX-4894	(813) 579-1254	Not
	<input type="radio"/>	Priya	Misys(TRAINING)	4/3/1986		XXX-XX-6325		Not

1 Patient(s) Selected View Pending Proxies Add Patient To Invite

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Proxy A	Health Record
--------------	------------	-----------	---------------	-----	-------	---------	---------------

Proxies To This Patient Proxies For Others

Add Healthcare Proxy

> Stacey Misys

Suspend Proxy Remove Proxy

Step Six

1. Use the scrollbar to scroll down to the bottom of the left hand side.
2. Click "Invite Proxy."

Home

Registration

Registration

Invite Patient Patient Queue (0) Proxy Merge Patients

misys

Social Security Number:

MRN:

Date of Birth:

<M/d/yyyy> 15

Search

Advanced Search

Portal Member	Select Patient	First Name	Last Name	DOB	Email	SSN	Phone	Org
	<input type="radio"/>	Emr11	Misys11(TRAINING)	12/12/1978		XXX-XX-7984		No
Has Invite	<input type="radio"/>	Emr12	Misys12	12/12/1948		XXX-XX-7654	(979) 879-8746	No
Has Invite	<input checked="" type="radio"/>	Stacey	Misys	9/3/2008		XXX-XX-4894	(813) 579-1254	No
	<input type="radio"/>	Priva	Misys(TRAINING)	4/3/1986		XXX-XX-6325		No

1) Use this scroll bar and scroll down to the bottom

Patient(s) Selected View Pending Proxies Add Patient To Invite

Add Healthcare Proxy

> Stacey Misys

Remove Patient

Invite Proxy

2) Click "Invite Proxy"

Proxies To This Patient Proxies For Others

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Proxy Ac	Health Record
--------------	------------	-----------	---------------	-----	-------	----------	---------------

Suspend Proxy Remove Proxy

Step Seven

1. Enter the Parent or Legal Guardian's First and Last Name and Email Address.
2. Verify the security code and inform the Proxy that they will use this code during registration.
3. Input the Parent or Guardian's Phone Number, Street Address, City, State, and Zip Code.
4. Set the Relationship that the Parent/Guardian has to the patient.
5. Click "OK" to finish.

The screenshot shows the 'Invite a Proxy' form with the following fields and callouts:

- 1) Enter the Parent/Guardian's Name and Email Address:** Points to the 'First Name' (Father of Stacey) and 'Last Name' (Misys) fields.
- 2) Enter the Security Code (the patient's birth year):** Points to the 'Security Code' field (8005).
- 3) Enter the Parent/Guardian's Phone Number, Street Address, City, State, and Zip Code:** Points to the 'Telephone Number' (5555555555), 'Street Address' (1234 Anywhere Street), 'City' (Anywhere), 'State' (South Carolina), and 'Zip Code' (55555) fields.
- 4) Click "OK":** Points to the 'OK' button.

Patient	Relationship	Access Level
Stacey Misys	Father	Full Access

Note: Once you have added all the information into the fields above, you will need to hit the **Tab** key in order for the "OK" to become activated so that you can click on it. Just another quirky little Allscripts thing, I guess.

Step Eight

1. Once the invitation is sent, fill out the bottom of the Registration form with your initials and the date.

For Front Desk Use Only	
Photo ID & Copies of Legal Documents Verified By:	Date:
For Portal Management Use Only	
Patient Portal Invite Sent By:	Date:

2. Scan the Registration form into Allscripts – into the sFMH Portal Consent folder.