Allscripts Software

FollowMyHealth™ Universal Health Record Patient Access v2.2.1

User Guide

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Chapter 1

Supported browsers

The following browsers are supported by FollowMyHealth™ Patient Access.

- Microsoft® Internet Explorer® 8.0 or later
- Mozilla Firefox® 2.0 or later
- Google Chrome™ 4.0 or later
- Apple® Safari® 3.0 or later

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Chapter 2

Patient Access user logon

Log on as existing user

You can log on as an existing user after you have registered and have a user ID and password.

1. Access the FollowMyHealth™ logon window in 1 of 2 ways.
   > Use your provider's custom FollowMyHealth™ located at a subdomain URL.
   > Use the default FollowMyHealth™ URL at https://www.followmyhealth.com/patientaccess.

   Log In opens.

2. Click **Log In**.
   Log In opens with a selection of account logon methods.

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Figure 1: Log In window with authentication

3. Click your preferred logon authentication method.
   You set up a primary authentication method when you first activated and registered your account. If you want to use FMH Secure Login, but have already logged on using an alternate logon method, you can create a FMH Secure Login and use that as your primary authentication method. To add another authentication method, including FMH Secure Login, go to **My Account > Preferences > Login Preferences**.

   Your authentication method logon window opens.
4. Enter your user name and password and click **Log in**.
   FollowMyHealth™ Patient Access opens.

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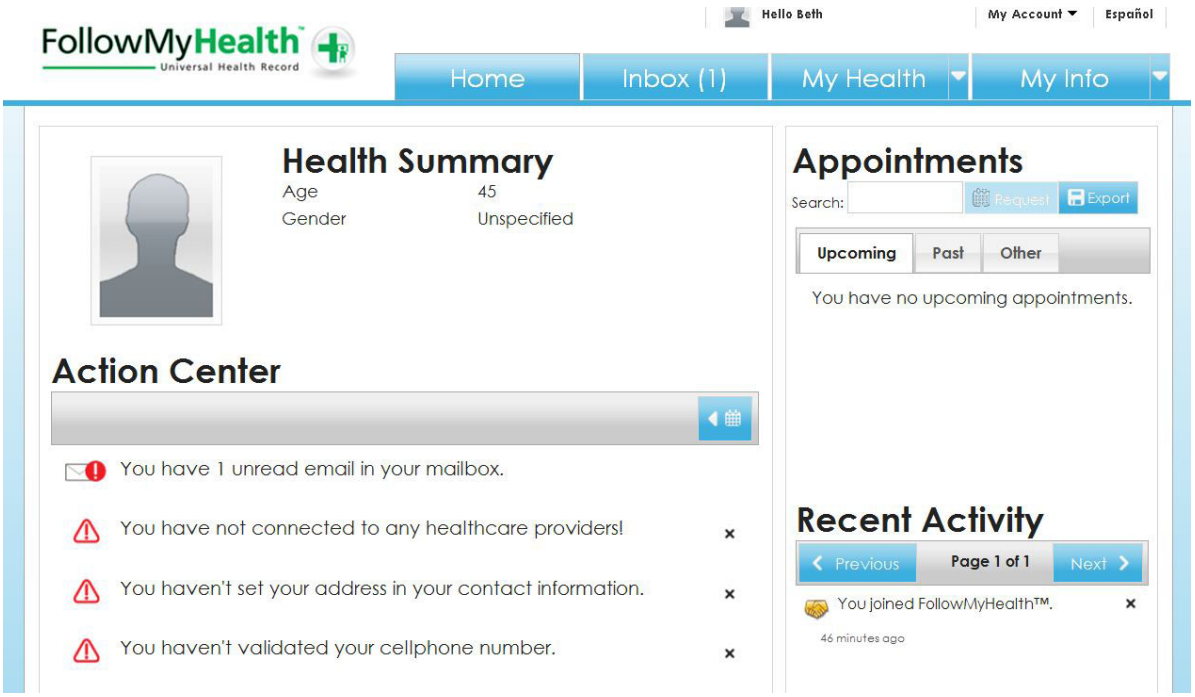

Figure 2: Patient Access

Get started as a new user

To get started with the FollowMyHealth™ Patient Access, you are sent an email invitation. The email contains an individualized link to the FollowMyHealth™ Universal Health Record logon window, where you can activate your account, select or create a primary logon method, and access your account for the first time.

Register a new account

The email invitation sent to you from your provider's organization provides a link for you to start the registration process.

You register your account by creating a new account or adding a connection to an existing account.

From the email, click the **Register for FollowMyHealth** link.
Your provider's FollowMyHealth™ logon window opens.

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> **Note:** Organizations can customize the portal logon window. The graphics, colors, and text might look different, but **Add This Connection** and **Create Account** are always displayed.

- Click **Create an Account** if you do not have an existing FollowMyHealth™ account.
- If you already have a FollowMyHealth™, click **Add This Connection**.

Create an Account opens, or the **Invite Wizard** starts and **Connect your account Step 1: Welcome** opens.

Create a new account

If you did not receive an invitation from your provider, but want to become a FollowMyHealth™ user, you must create an account.

1. From the FollowMyHealth™ logon window, click **Create an Account**.
   Create an account opens.

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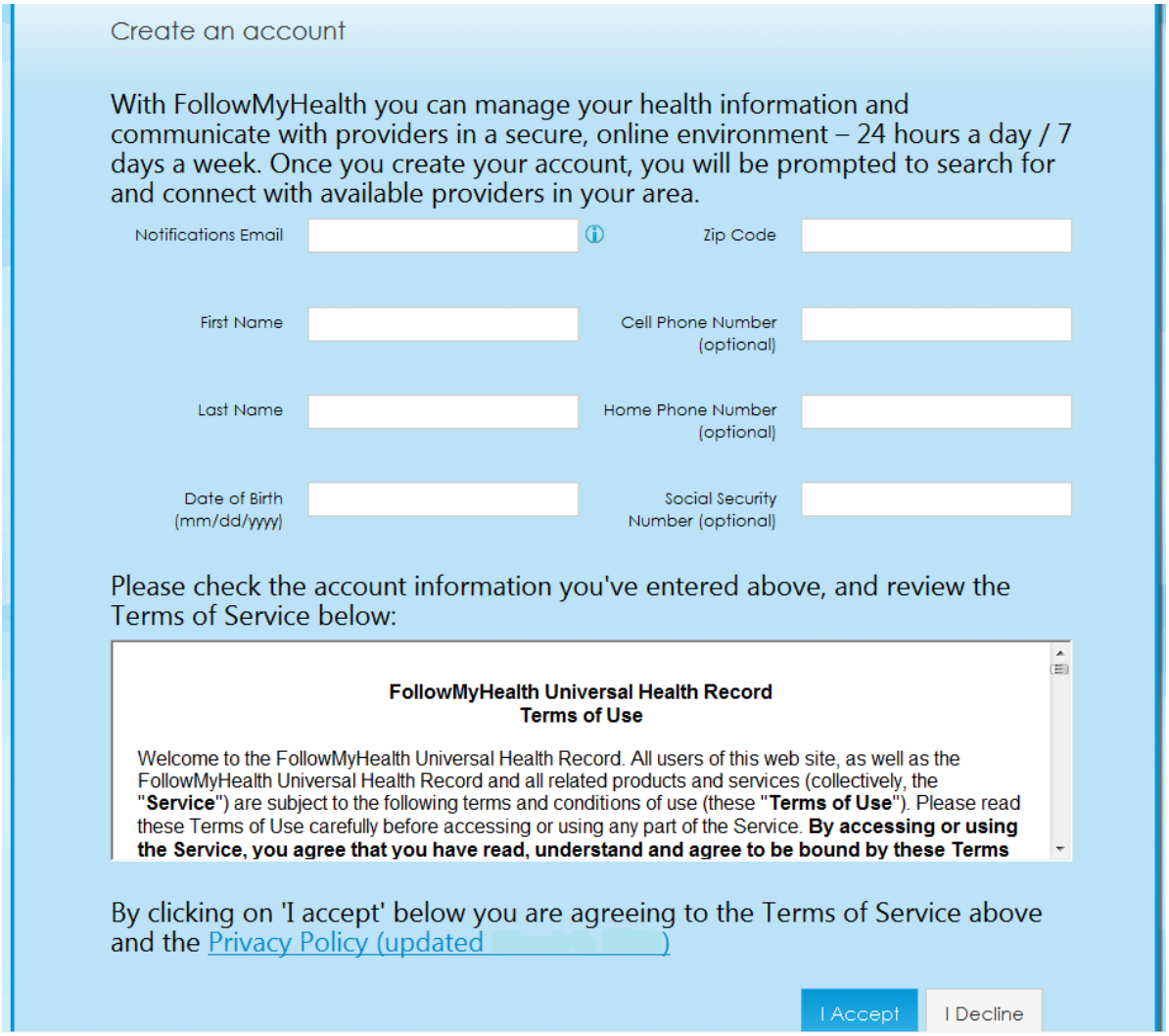

2. Enter the applicable information in the boxes.

Notifications Email

Specifies an email address where you can receive notifications regarding your health record.

First Name

Specifies the first name of the account holder.

Last Name

Specifies the last name of the account holder.

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Date of Birth

Specifies the account holder's date of birth.

Zip Code

Specifies the ZIP Code of the account holder.

Cell Phone Number

Specifies the cell phone number of the account holder. This is optional.

Home Phone Number

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

Social Security Number

Specifies the Social Security Number of the account holder. This is optional.

3. Read the terms of use and click **I Accept**.
Select a Login Method opens.

If you are a first-time user, you must select an authentication method.

Connect an existing FollowMyHealth account

You can connect an existing FollowMyHealth™ account to another healthcare provider's patient portal.

Before you begin

You must have an email invitation from the healthcare provider to join the patient portal.

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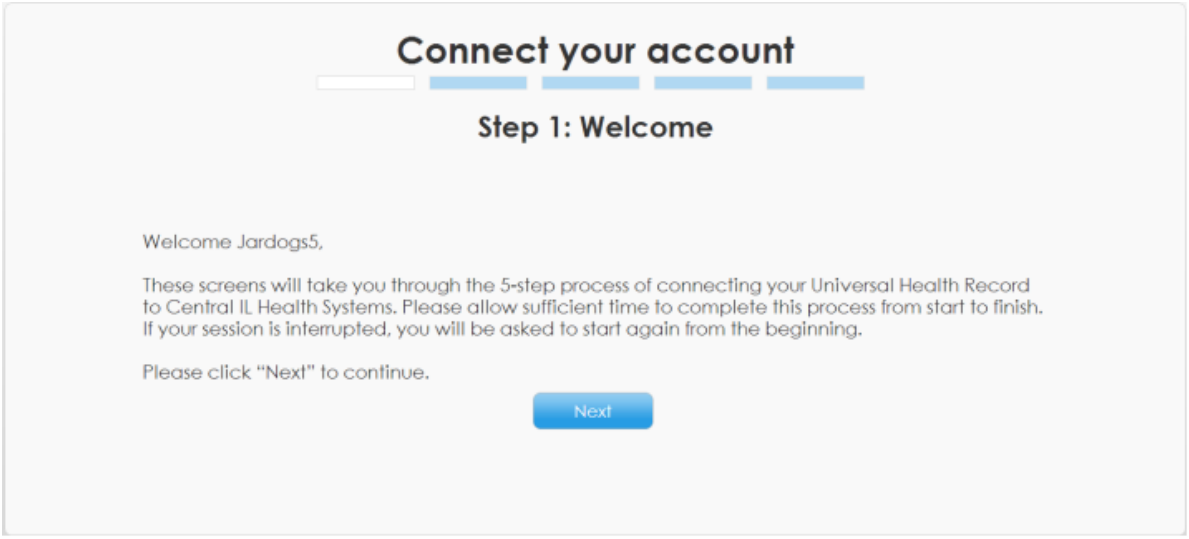
This process registers your account with the healthcare provider patient portal and enables you to log on to the provider's patient portal.

This task has 6 steps.

1. From the FollowMyHealth™ logon window, click **Add This Connection**.
   The organization's logon window opens.

2. Select an authentication method and log on with your existing FollowMyHealth™ account credentials.
   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.

3. Click **Next**.
   Connect your account Step 2: Enter Invite Code opens.

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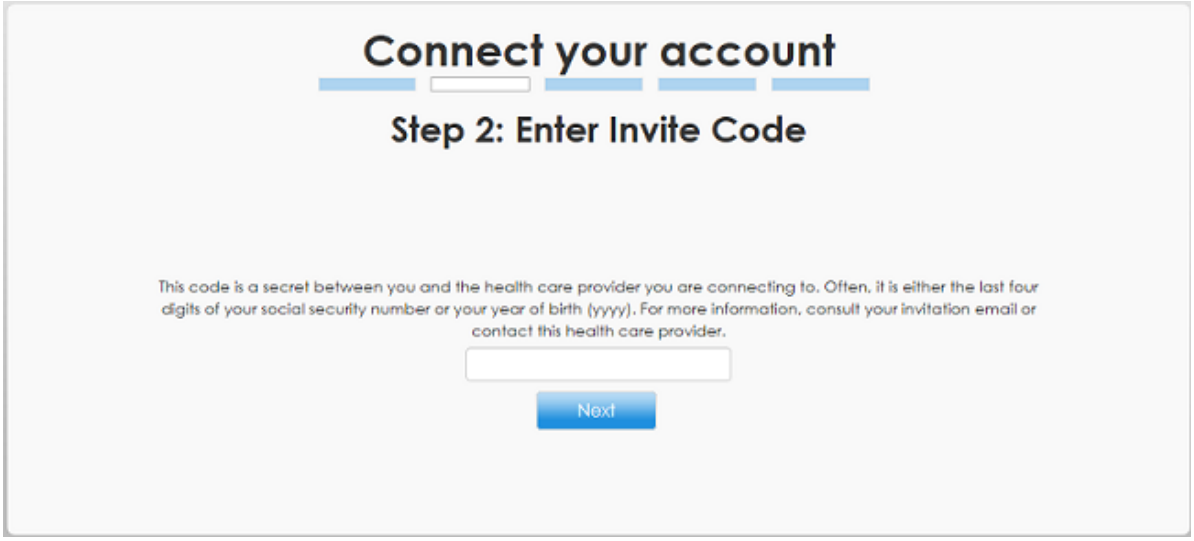
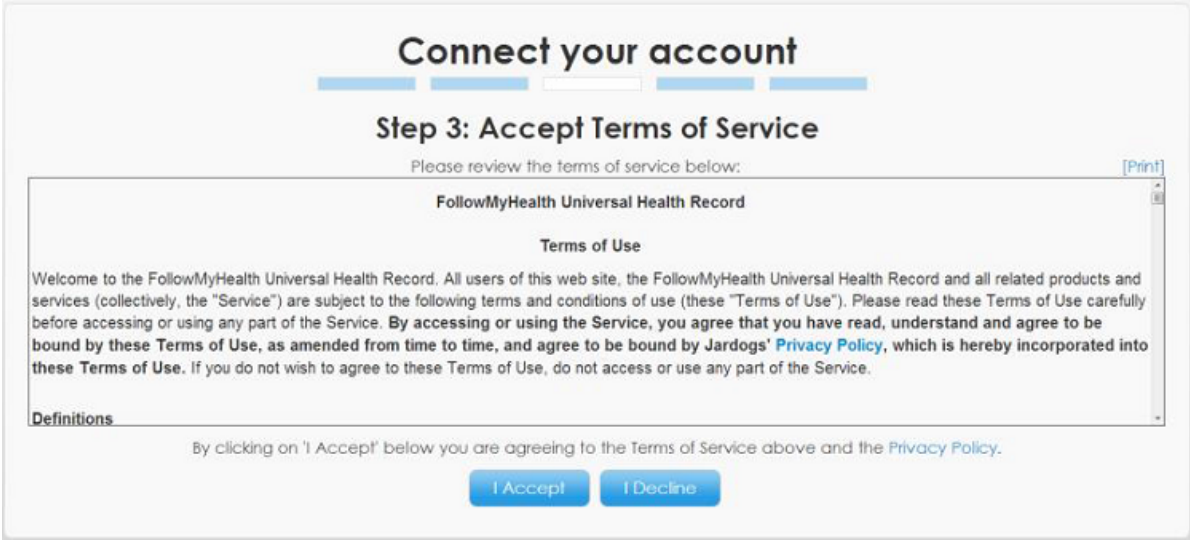


4. Enter the invitation code that you received in the invitation email and click **Next**.

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

Connect your account Step 3: Accept Terms of Service opens.



5. Click **I Accept** to accept the terms of service for your healthcare provider.

> **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 4: Release of Information opens.

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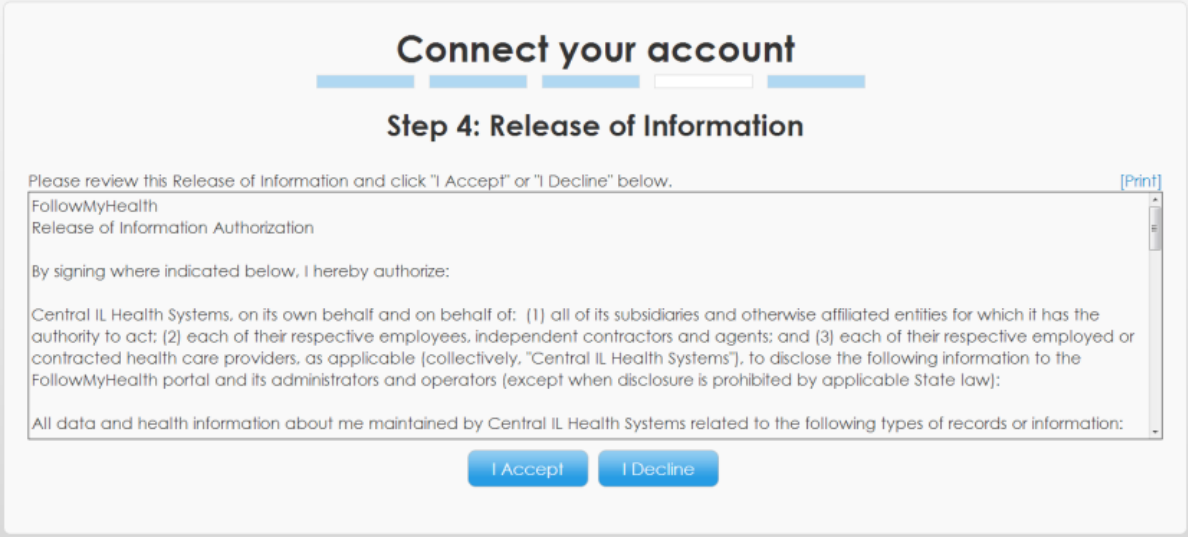
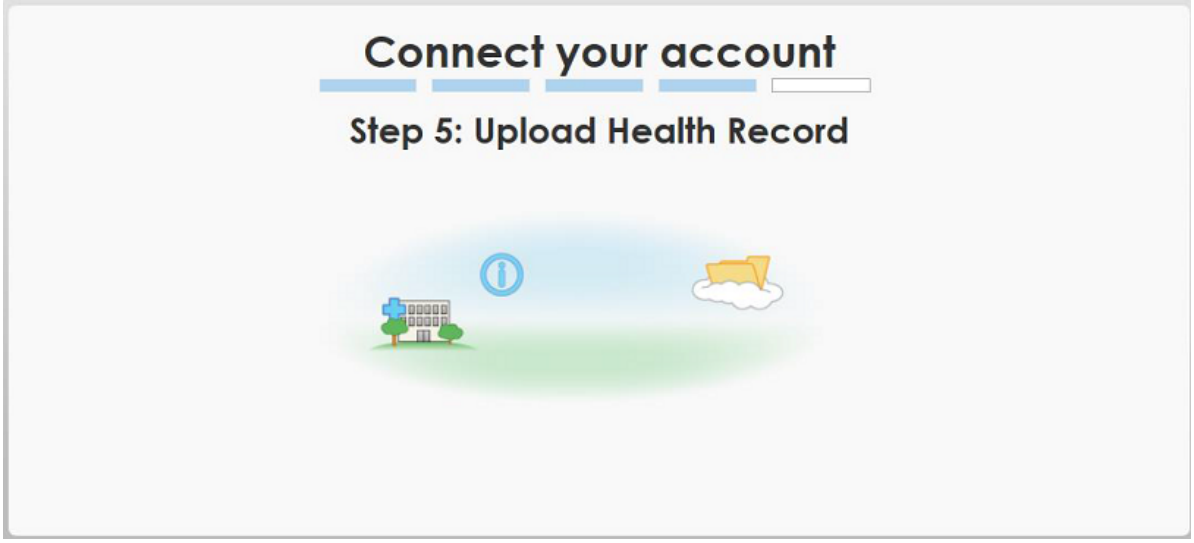


6. Click **I Accept** to release your healthcare record to FollowMyHealth™.
   You must accept the Release of Information. The Release of Information permits FollowMyHealth™ to obtain and store your medical information from the organization. If you decline, your medical information is not obtained from the organization.

   Connect your account Step 5: Upload Health Record opens.



Results of this task

When the upload is complete, your account is connected to FollowMyHealth™ and the **Home** tab is displayed.

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Register as a proxy

If a patient requires a proxy, an email invitation is sent to the proxy and the proxy must create an account or log on with their existing FollowMyHealth™ credentials.

This task has 7 steps.

1. Click the FollowMyHealth™ invitation link in the invite email received from the organization. **Log In** opens.

   The progress bar represents the step you are on in the account connection process.

2. If you have an existing FollowMyHealth™ account, log on with your credentials. If you do not have an account, click **Create an Account**, create the account, and then log on.
   The **Invite Wizard** starts and **Register as Proxy** opens after you log on.

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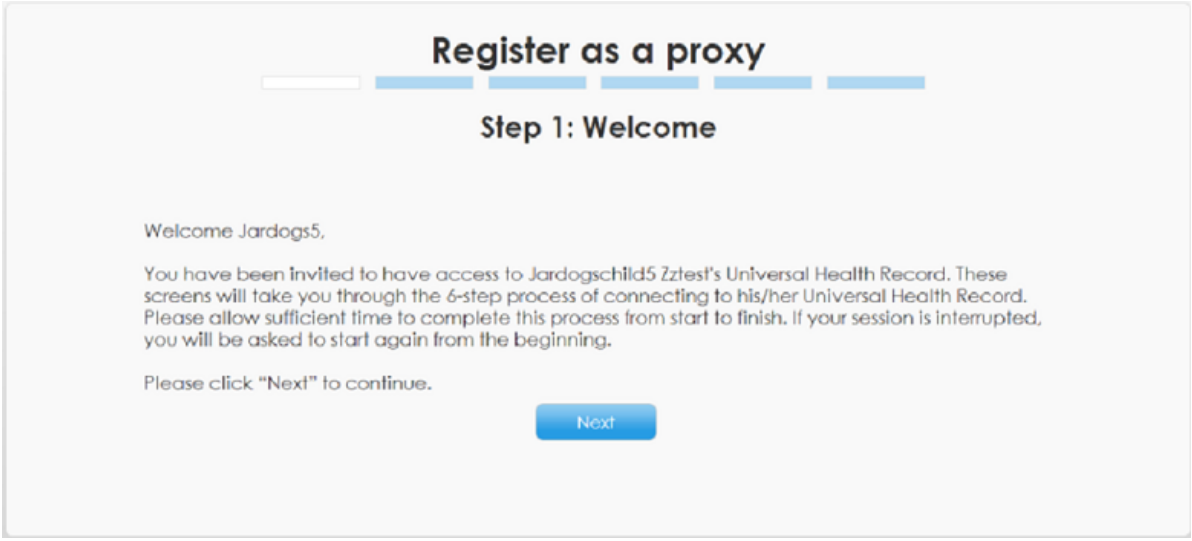
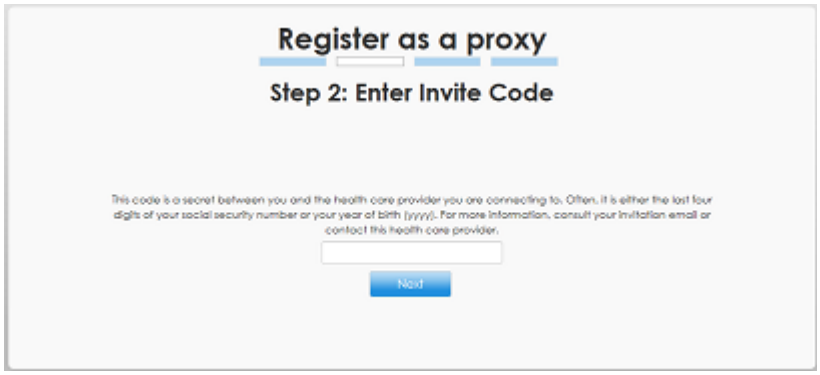
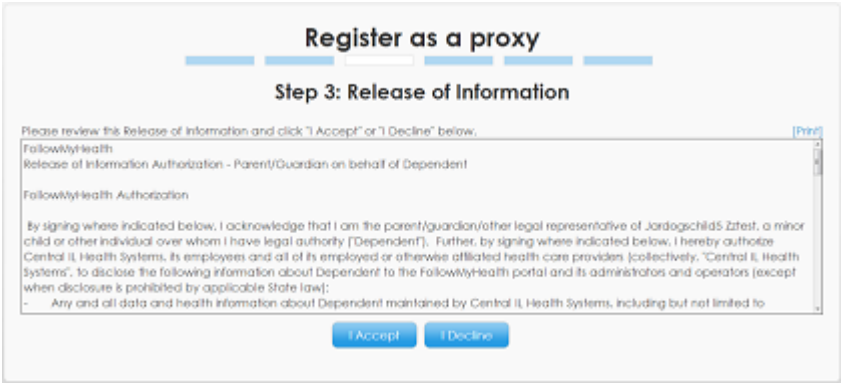


3. Click **Next**.
   Register as a proxy Step 2: Enter Invite Code opens.



4. Enter the invite code that you received when you requested proxy access and click **Next**.
   If you do not know your invite code, contact the healthcare organization who invited you.

   Register as a proxy Step 3: Release of Information opens.



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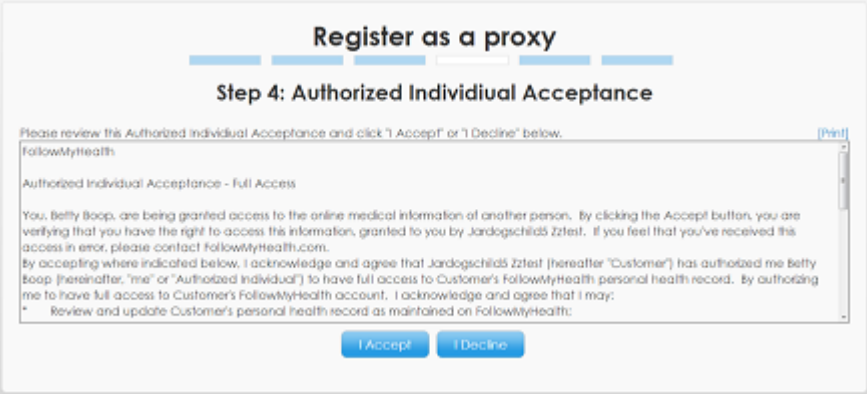
5. Click **I Accept** to release the healthcare record to the healthcare provider.

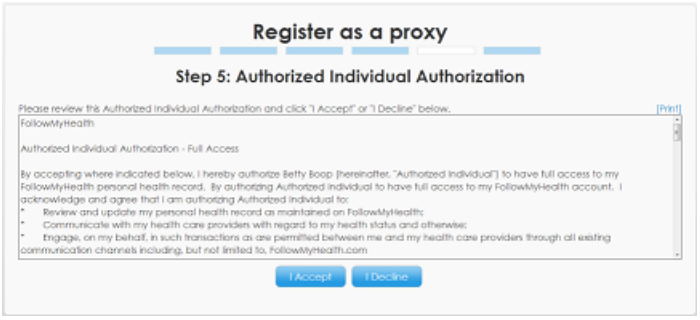
> **Note:** This step is only presented to the first proxy user for a patient. All subsequent proxy users are not presented with this step.

Register as a proxy Step 4: Authorized Individual Acceptance opens.



6. Click **I Accept** to authorize individual acceptance.
You must accept **Authorized Individual Acceptance** for the patient you are a proxy for. This authorization details what access is authorized for proxy.

Register as a proxy Step 5: Authorized Individual Authorization opens.



7. Click **I Accept** to authorize individual authorization.
You must accept **Authorized Individual Authorization** for the patient that you are a proxy for. This authorization details what access is authorized for proxy. You are only prompted to perform this step if the patient is not able to create his or her own FollowMyHealth™ account.

Connect your account Step 6: Upload Health Record opens and the healthcare record is uploaded. When the upload is complete, the **Home** tab is displayed.

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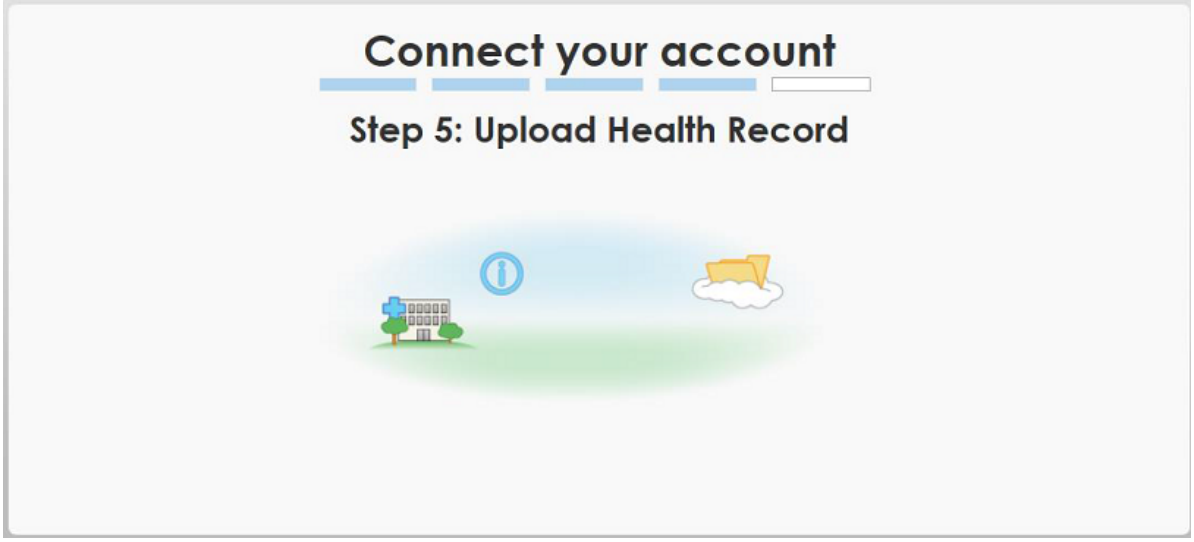

Select an authentication method

You can log in using authentication methods including FMH Secure Login, Facebook, Google, Yahoo!®, Microsoft® Windows® Live ID, or Cerner Health.

> **Attention:** Logging in with an authentication method other than FMH Secure Login only authenticates you to FollowMyHealth™. Your login information is not shared between FollowMyHealth™ and these authentication providers. FollowMyHealth™ does not have access to your password.

1. To use FMH Secure Login, Facebook, Google, Yahoo!®, Microsoft® Windows® Live ID, or Cerner Health, click the respective icon (

). The application logon window is displayed for the application icon that you clicked.

2. Log on to the application using your existing account or click

 to create a user name and password.

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Create an FMH Secure Login

You can create your own unique user names and passwords for accessing FollowMyHealth™ Universal Health Record by creating a FMH Secure Login account.

To use FMH Secure Login to log on to the FollowMyHealth™ portal, you must first create a FollowMyHealth™ secure logon account.

FMH Secure Login registration is separate from FollowMyHealth™ registration, but is integrated into the invitation acceptance process for first-time users who want to create a unique authentication account.

> **Note:** If you are using another authentication method and want to add FMH Secure Login, from the dashboard, click **My Account > Preferences > Login Preferences**.

1. From FollowMyHealth™ logon window, click

. **Create FMH Secure Login** opens.

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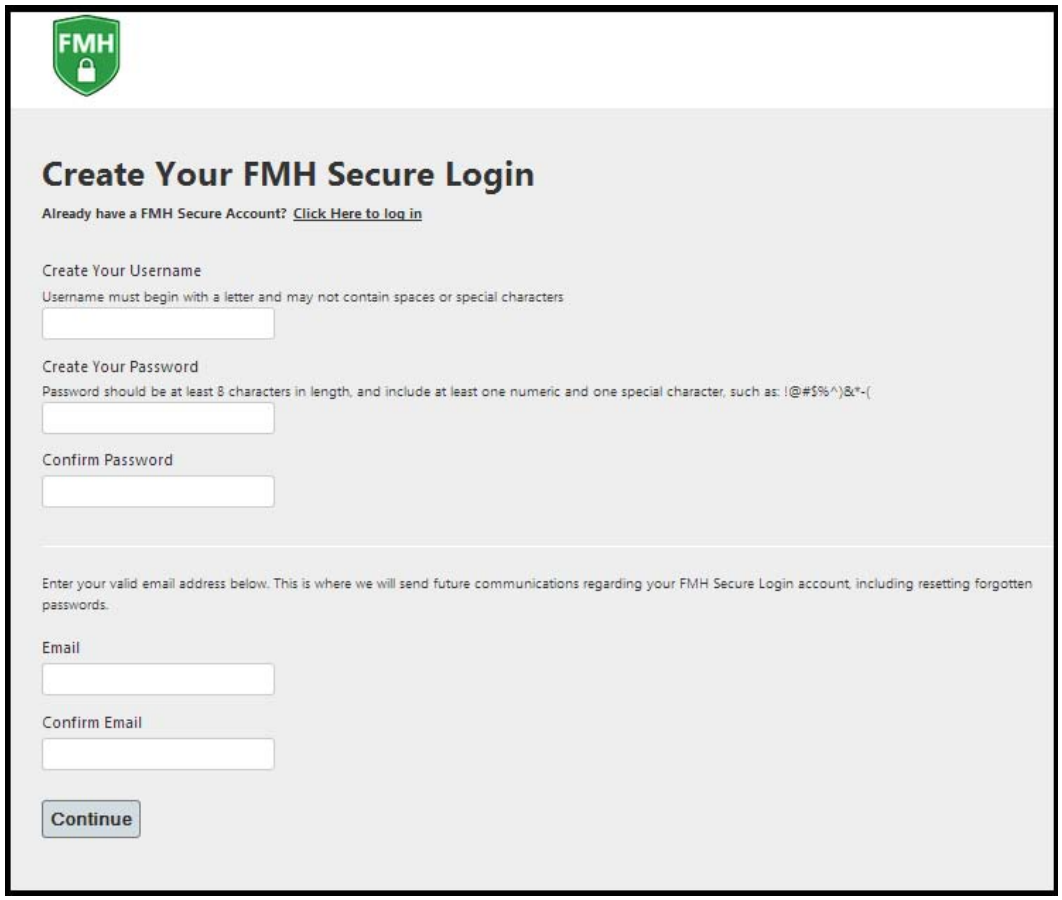

2. Enter information in the boxes.

Username

Specifies a user name. User names must start with a letter and cannot use spaces or other special characters.

Email

Specifies a valid email address. This email address is used for FMH Secure Login correspondence emails. You receive 1 email during the registration process. If you want to use the 2-step verification method with email as the communication method of choice, this email is used to send the PIN. To enable 2-step verification, click **My Account > Preferences > Login Preferences > FMH Secure Login Preferences**.

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Confirm Email

To prevent lost correspondence to the recipient of FMH Secure Login credentials, you must confirm your email address.

Password

Specifies a password. The password must have at least 1 alpha, 1 numeric, and 1 special character, with the entire password being no less than 8 characters.

Confirm Password

You cannot complete the registration process without successfully confirming the password.

3. Click **Continue**.
   An email is sent to the email account that you entered in the **Email** and **Confirm Email** boxes in step 2 of this task.

What to do next

Set up your login preferences and log on for the first time.

Request a connection to a healthcare organization

When you create a FollowMyHealth™ account without an invitation from your healthcare organization, you are prompted to request a connection to 1 or more area healthcare organizations who participate in FollowMyHealth™.

You can search for matches by ZIP Code, provider, or organization. FollowMyHealth™ searches by ZIP Code by default. If you do not want to request connections, click **Skip This Step**. If you click **Skip This Step**, you are prompted to verify that you do not want to search for connections and **Home** opens.

1. Enter your ZIP Code, organization, or provider in **Search**.
   Providers and organizations are listed in **Search Results**.

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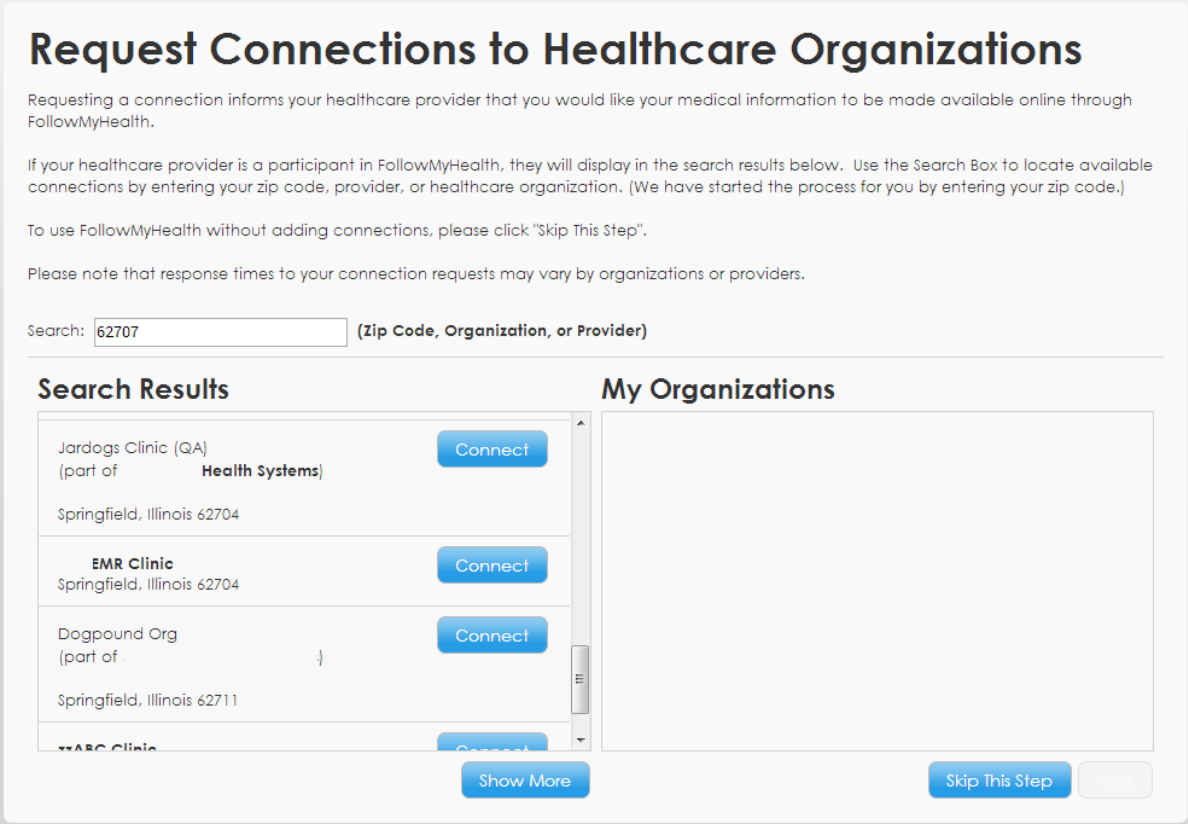

2. Click **Connect** adjacent to the organization that you want to connect to.
   The organization is listed in **My Organizations**.
3. Click **Connect** when you have added all of the organizations to connect to.
   The **Home** tab opens.

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.

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Chapter 3

Static toolbar

The static toolbar is available from all FollowMyHealth™ Patient Access windows and tabs.

Figure 3: Static toolbar

You can compose email messages, request appointments, view the logged-in user or proxy, 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 the user who is logged in. You can use the drop-down list to access proxy accounts assigned to you.

My Account

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

Español

Click **Español** to change the user interface to Spanish language.

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Search

Click the **Search** icon to search all tabs in FollowMyHealth™ Patient Access.

Search FollowMyHealth Patient Access

You can search all tabs and windows in FollowMyHealth™ Patient Access 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**.

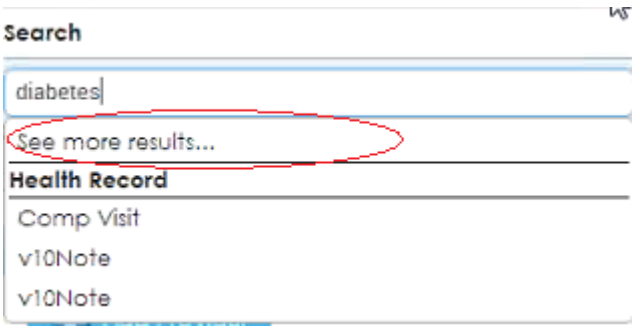

Figure 4: See more results or quick list

2. Click **See more results**.
   Search opens.

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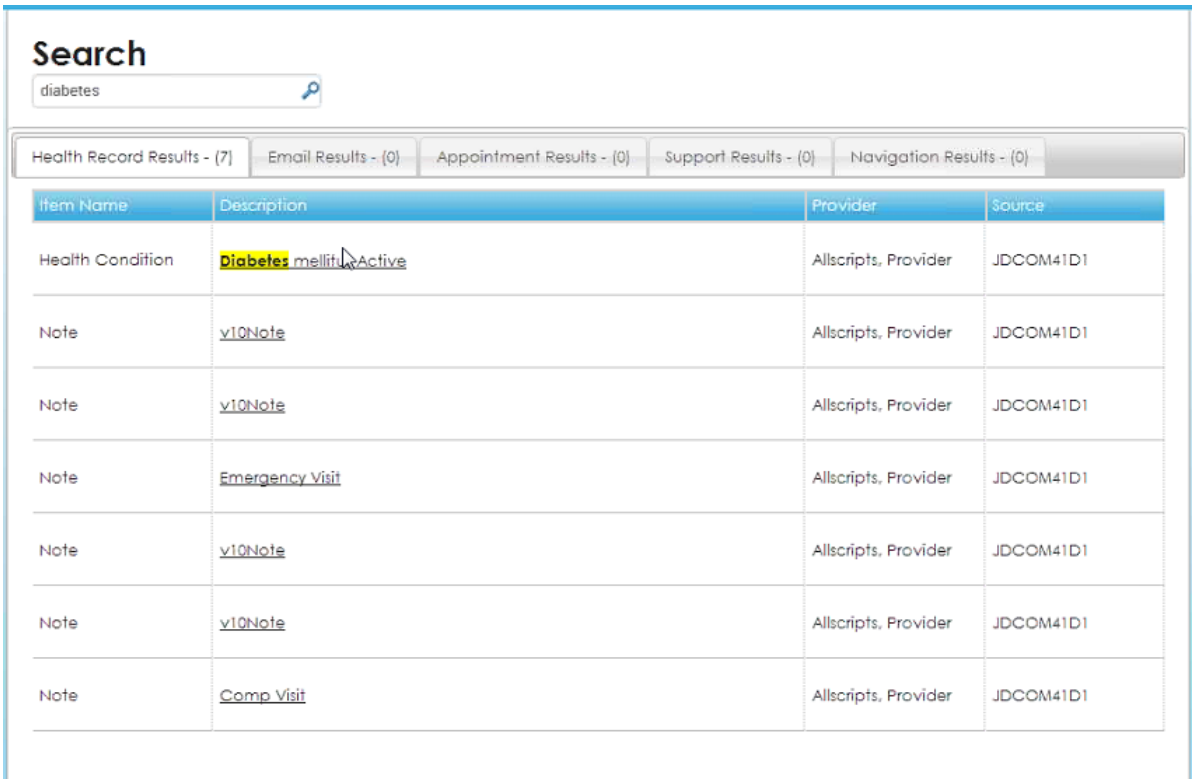

The search results are organized in a tabs.

3. From **Description**, click the result description to open details about the item.
If the item is a clinical item, an edit dialog 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 log off FollowMyHealth™ from **My Account**.

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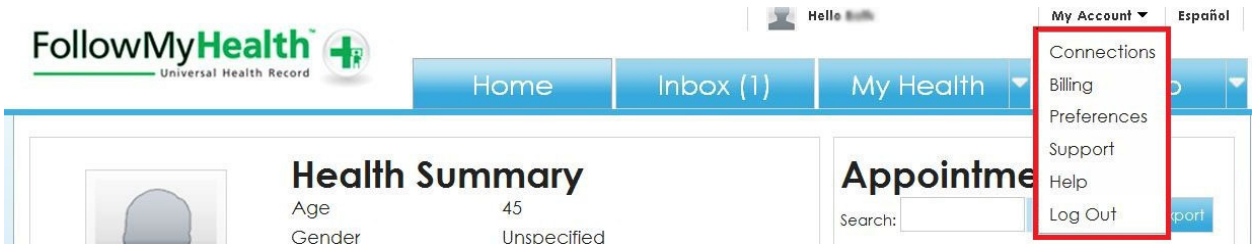


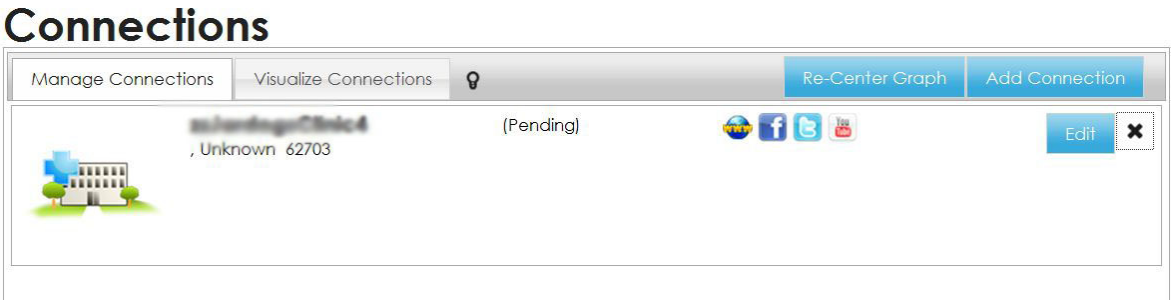
Figure 5: My Account menu

Manage connections

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

This task has 6 steps.

1. Click **My Account > Connections**.
   Connections opens.



2. Click the **Manage Connections** tab.
   A list of connections and pending connections are displayed in the tab.
3. To edit the clinic settings for each connection, click **Edit**.
   An interactive graph of the connection is displayed on the **Visualize Connections** tab. When accessing the **Visualize Connections** tab through **Edit**, you can only update the types of clinic settings that are connected to the provider. Otherwise, directly clicking the **Visualize Connections** tab enables you to see details about the connections and settings.

   Turn on and off clinic settings that you want to include in your connection by clicking **On** or **Off**. You can also click an image in the graph to change the status of the clinic settings. The setting is turned off when the line connecting **Clinic Settings** and the setting is red.

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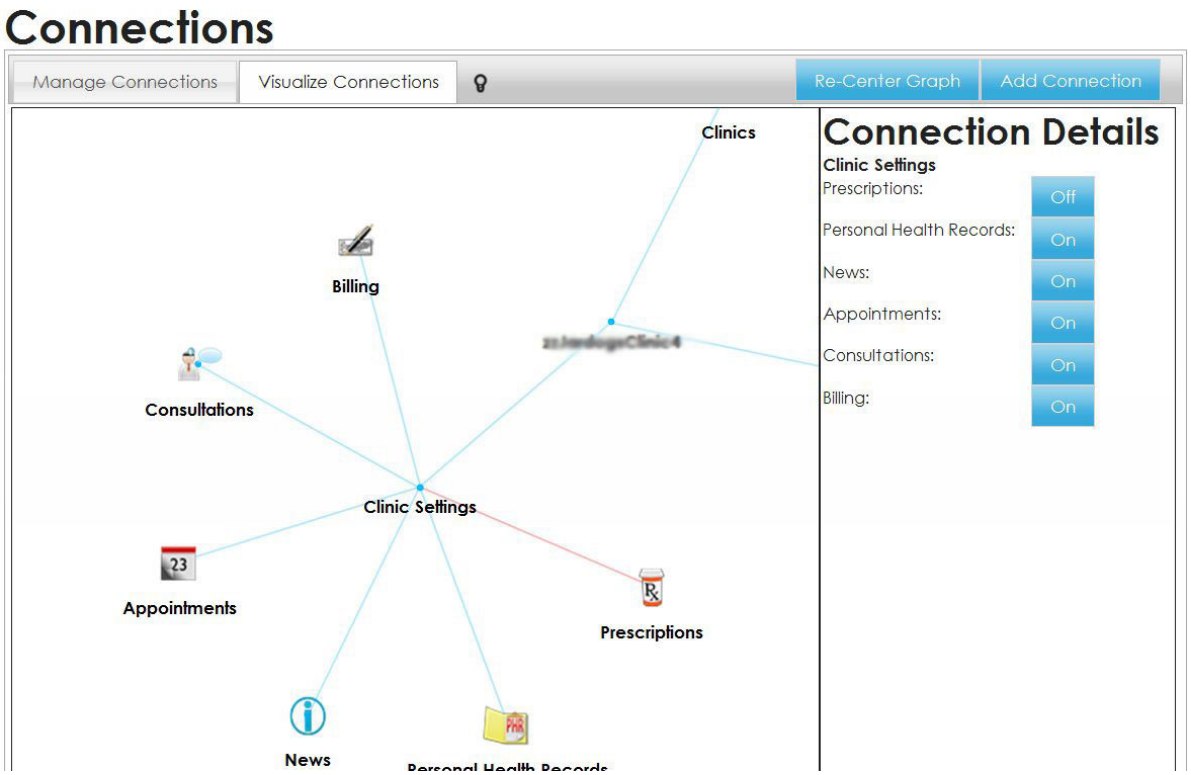

Figure 6: Visualize Connections

4. To view the details about each connection, click the **Visualize Connections** tab.
   Your care system, as known by FollowMyHealth™, is displayed on the **Visualize Connections** tab. You are represented by your picture in the center of the graph. The healthcare organizations that you are connected to, proxy representation, and clinical settings starburst from your photo.

   Click an organization, proxy, or setting represented on the graph and the details open in **Connection Details**.

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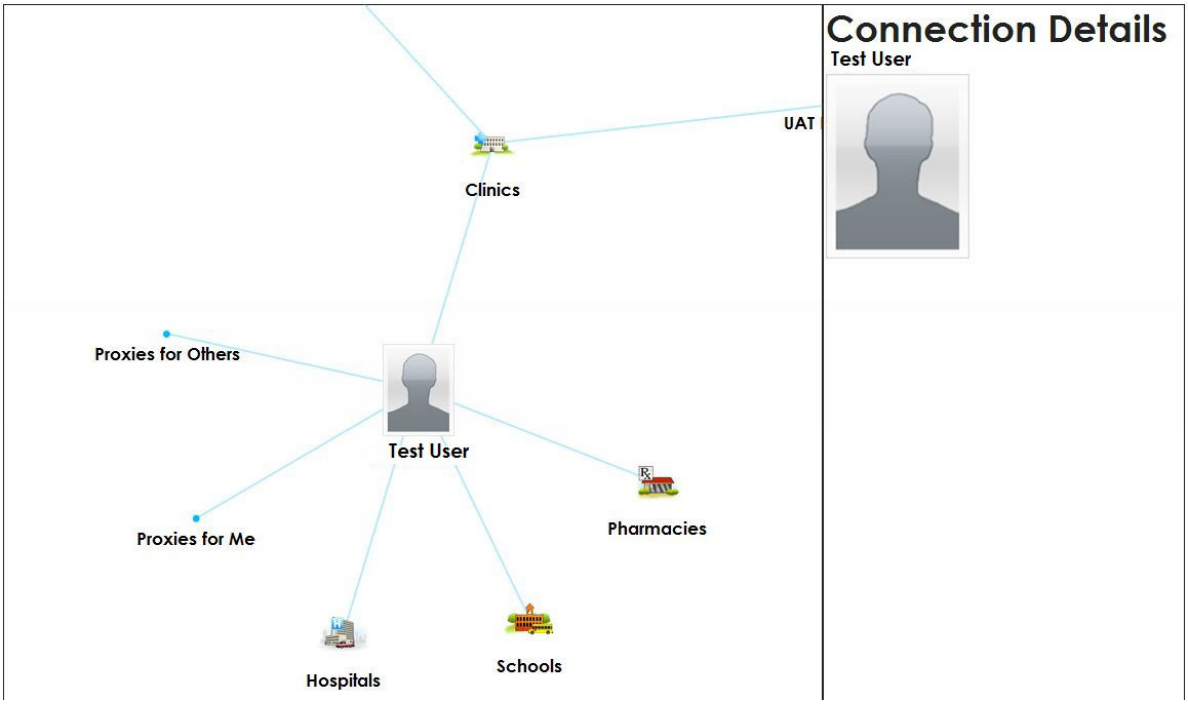

Click **Re-Center Graph** to go back to the center of the graph.

5. To remove a connection, click the delete ×.
   A message opens where you can confirm that you want to delete the connection.
6. Click **OK**.

Manage account preferences

Preferences control several processes in FollowMyHealth™ such as proxy, logon 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.
- **Login Preferences**
  Manage your logon methods, such as FMH Secure Login.
- **Notification Preferences**
  Manage how you want to be notified about new information to your heath record.
- **Restore Deleted Items**
  View and restore items that you have deleted from your health record account.

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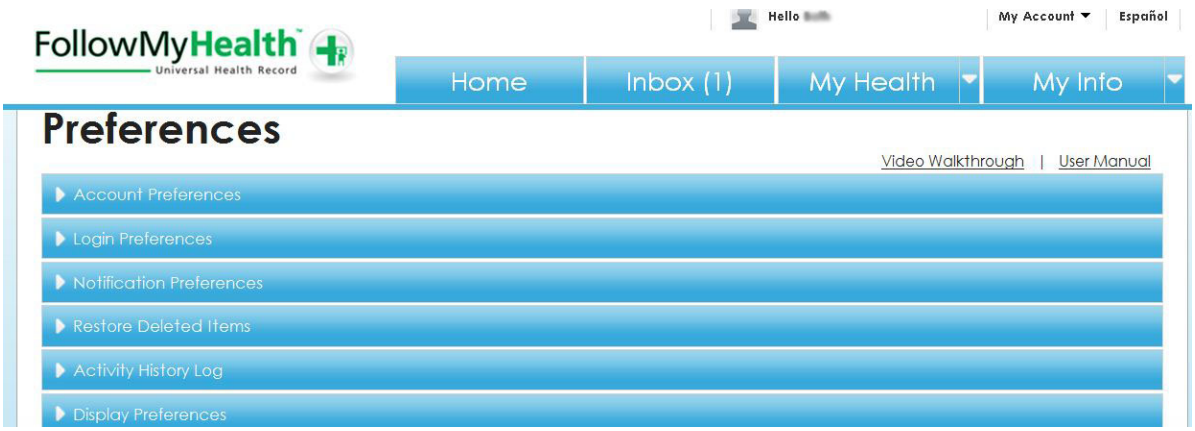
- **Activity History Log**
  View the recent activity for your health record account.
- **Display Preferences**
  Manage the visual display settings in your FollowMyHealth™ account.

1. Click **My Account > Preferences**.
   Preferences opens.



2. Select the preference section that you want to work with.

Invite a proxy

Proxy is the authority to represent someone else or a person authorized to act on behalf of another.

You can invite another person to access your FollowMyHealth™ account by using the **Invite a Proxy** process. If you want to be a proxy for another patient, he or she must invite you from his or her own FollowMyHealth™ account, or the healthcare organization must send you a proxy invitation email on behalf of that patient. To request proxy access to a minor, contact your child's healthcare organization.

This task has 5 steps.

1. From **Preferences**, click **Account Preferences**.
   Account Preferences opens.

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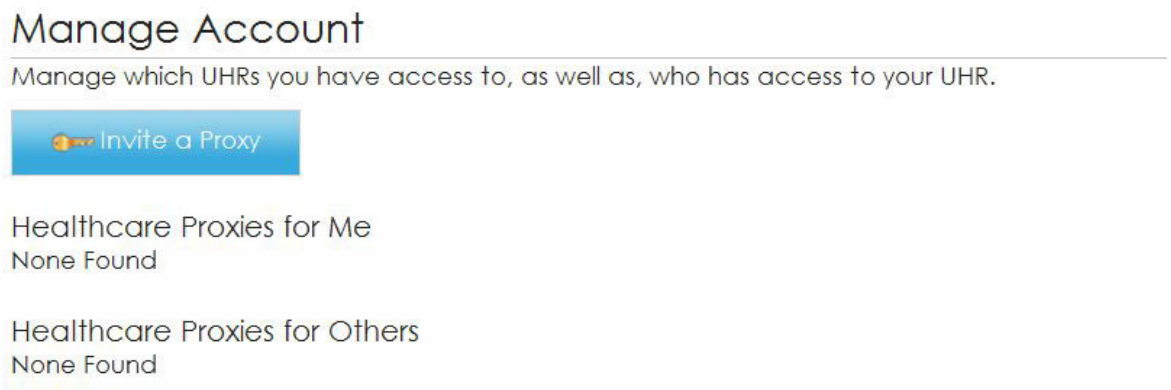
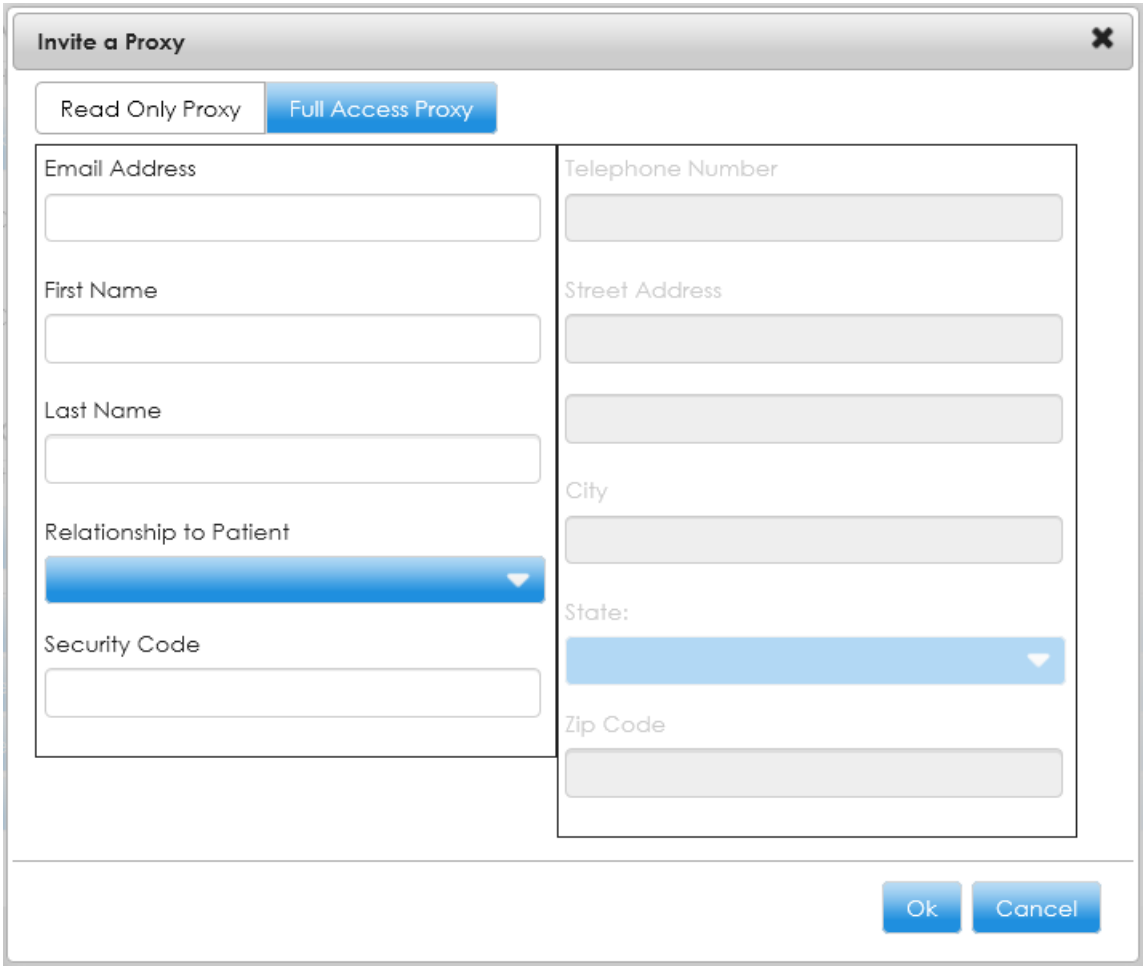


2. Click **Invite a Proxy**.
Invite a Proxy opens.



3. Complete the information in **Invite Proxy**.

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If you want the proxy to have full access to your account, that is, access your FollowMyHealth™ account, 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 proxy to be able to only view your account, click **Read Only Proxy**.

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

4. Click **OK**.
   Invitation Confirmation opens where you can confirm that you want to send a proxy invitation.
5. Click **OK** to send the proxy invitation.

Manage billing

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

There are 3 sections in **Billing**.

- **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.

This task has 6 steps.

1. 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.

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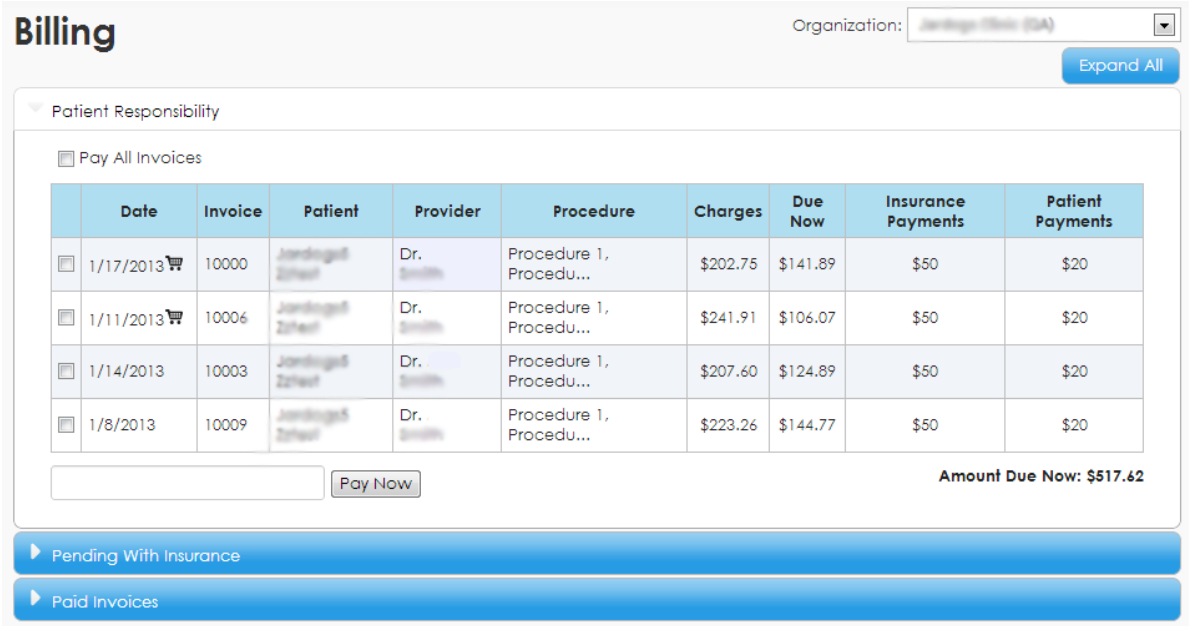

2. If you are connected to more than 1 organization, select an organization from **Organization**.
3. To pay an invoice in **Patient Responsibility**, you can either select **Pay All Invoices** to pay all of the outstanding invoices listed or select a single invoice from the list.
   The invoice amount 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 FollowMyHealth™ 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 zero balance.

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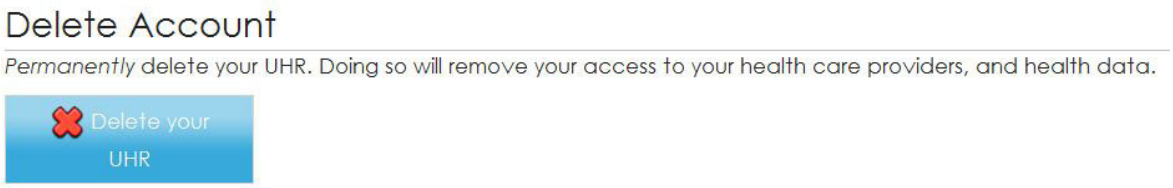
Delete your Universal Health Record account

> **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 **Preferences**, click **Account Preferences**.
   Account Preferences opens.



2. Click **Delete your UHR**.
   A warning message window opens to confirm that you want to delete your account.
3. Click **OK** to permanently delete your FollowMyHealth™ account.

Add an authentication method

You must select an authentication method to log on to FollowMyHealth™. Authentication methods include FMH Secure Login, Facebook, Google, Yahoo!®, Microsoft® Windows® Live ID, or Cerner Health.

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

1. From **Preferences**, click **Login Preferences**.
   Login Preferences opens.

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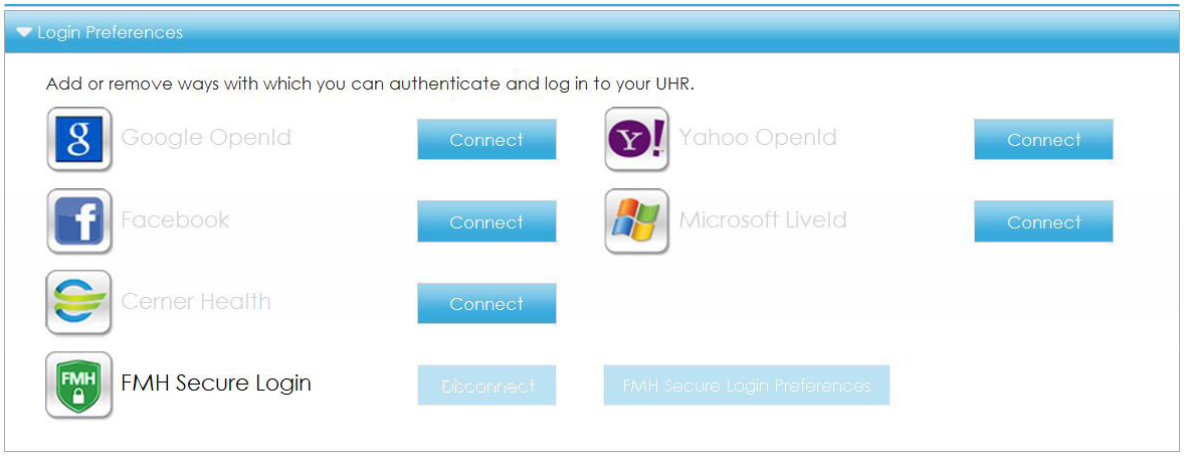

2. Click **Connect** next to the authentication method that you want to add.
   The logon window opens for the authentication method.
3. Enter your user name and password for the authentication method.
   Disconnect changes to **Connect** next to the authentication method in **Login Preferences**.

Results of this task

You have added an authentication method. The next time you log on to FollowMyHealth™, click the authentication method icon that you want to log on with.

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 appointment reminders, appointment confirmations, news bulletins, or changes to your health record.

1. From **Preferences**, click **Notification Preferences**.
   Notification Preferences opens.

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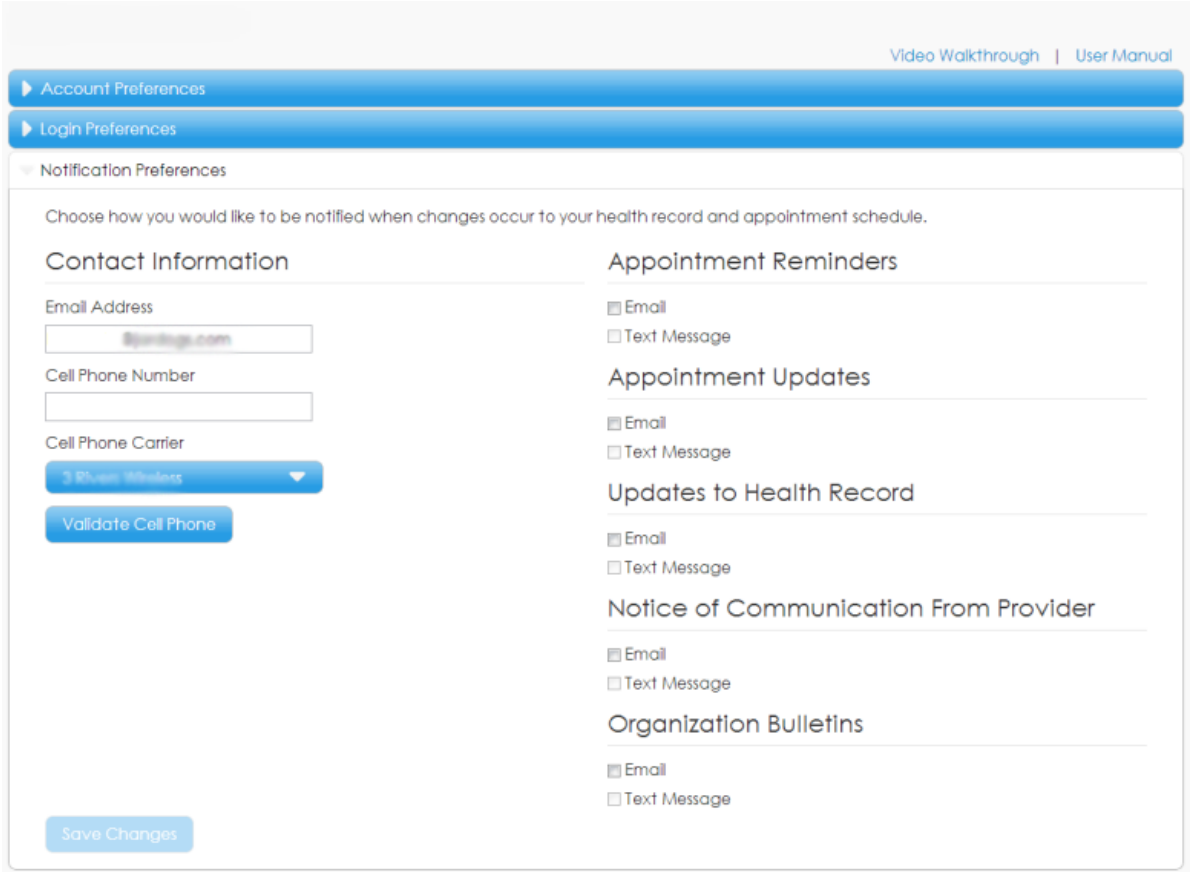

2. Enter your contact information in **Email Address** and **Cell Phone Number**.
   Notifications are sent to you through an external email address or cell phone. Enter the email address and cell phone number that you want to use for notifications. In Step 3, you can select which method you want to use for different types of notifications.
   a) From **Cell Phone Carrier**, select the cell phone carrier that you use for cell phone service.
   b) Click **Validate Cell Phone**.
      A warning message is displayed stating that standard rates apply for sending the validation code through text message, as well as other text messages from FollowMyHealth™.
   c) Click **OK**.
      FollowMyHealth™ sends you a text message to your cell phone with a code.
   d) Enter the code in **Please enter the 4-digit code contained in the SMS text message** and click **Validate Code**.
      Validation Message opens to confirm that your cell phone is validated.
   e) Click **OK**.
3. Go through each notification type section and select **Email** or **Text Message** to configure how you want to receive notifications.

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The notification email defaults to 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** section 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.

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**.

4. Click **Save Changes**.

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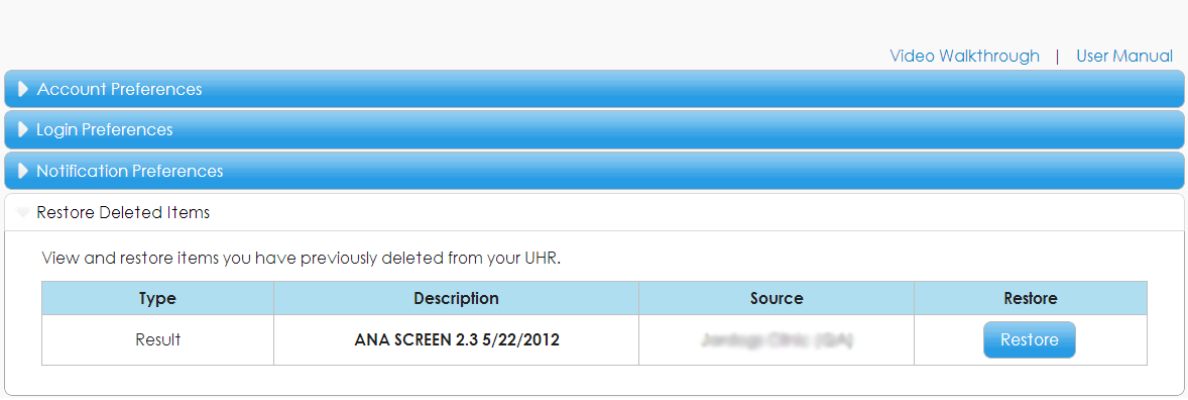
Restore deleted information

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

1. From **Preferences**, click **Restore Deleted Items**.
   Restore Deleted Items opens.



2. 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 type window in **My Health**. For example, the result **ANA SCREEN 2.3 5/22/2012** is listed in **My Health > Results**.

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.

From **Preferences**, click **Activity History Log**.
Activity History Log opens.

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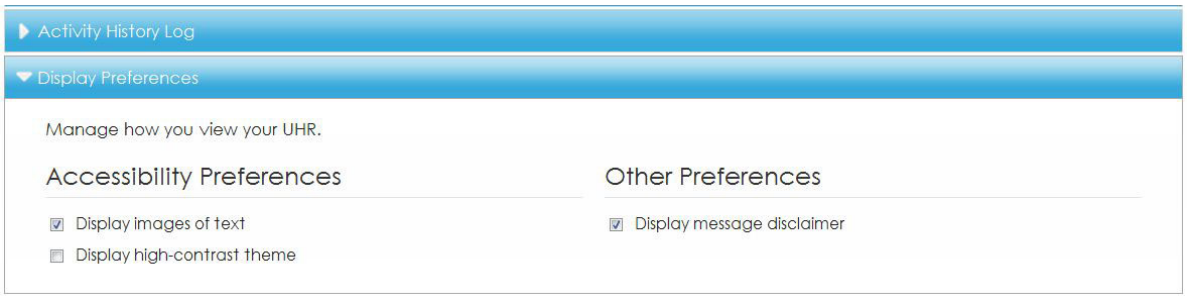
Set display preferences

You can change the way the FollowMyHealth™ user interface is displayed, make alternative text available for images, and enable disclaimers on messages.

1. From **Preferences**, click **Display Preferences**.
   Display Preferences opens.



2. Select the preferences that you want to change.

Display images of text

Select this preference to control how the low, medium, and high graphic displays on **Results** in **My Health**.

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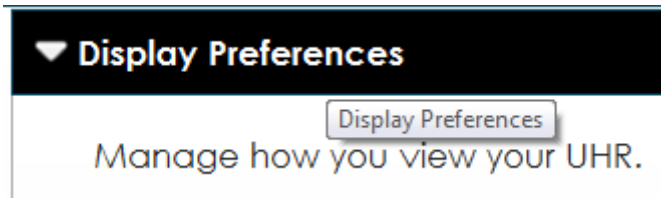
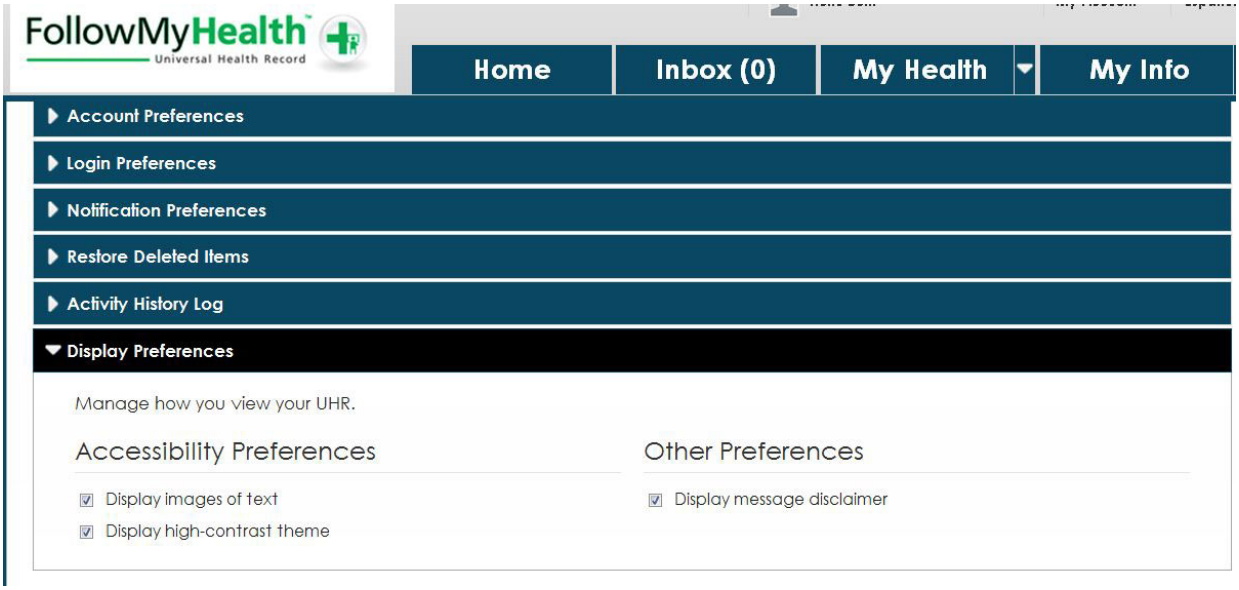


Display high-contrast theme

Select this preference to change the color of the user interface to a high contrast resolution for the visually impaired.



Display message disclaimer

Select this preference 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.

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. Click **My Account > Support**.

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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™ Patient Access 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 http://www.youtube.com/watch?v=SpypsjSy0rs.

> **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.

Support Information opens with links to several types of assistance.

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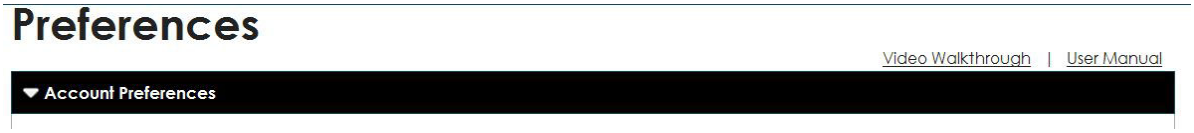
2. To access Knowledge Base, click **My Account > Help**.
   Knowledge Base opens.

3. To access the 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.



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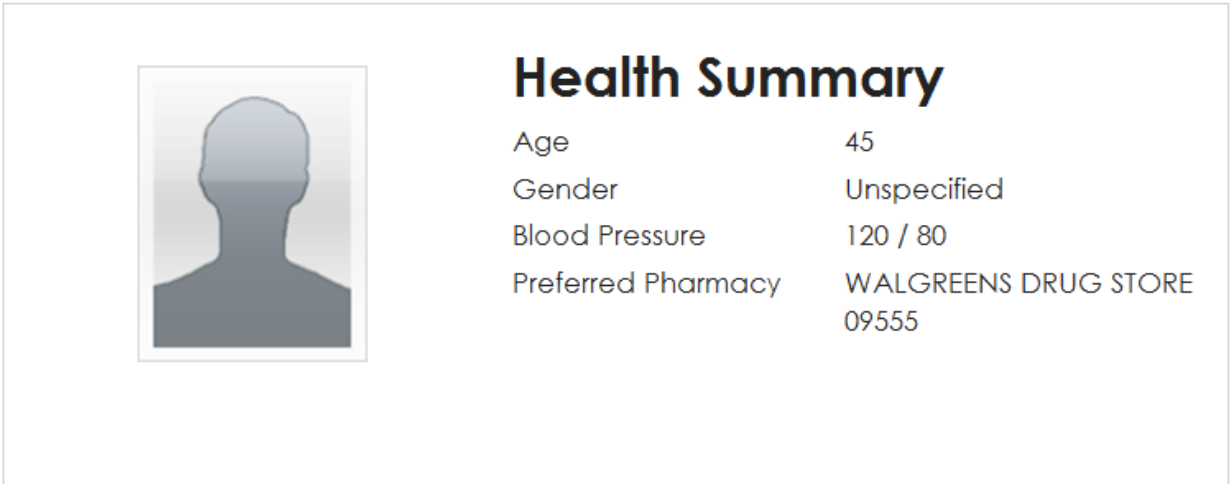
Chapter 4

The Home tab

The **Home** tab is the first tab to display after you log 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.



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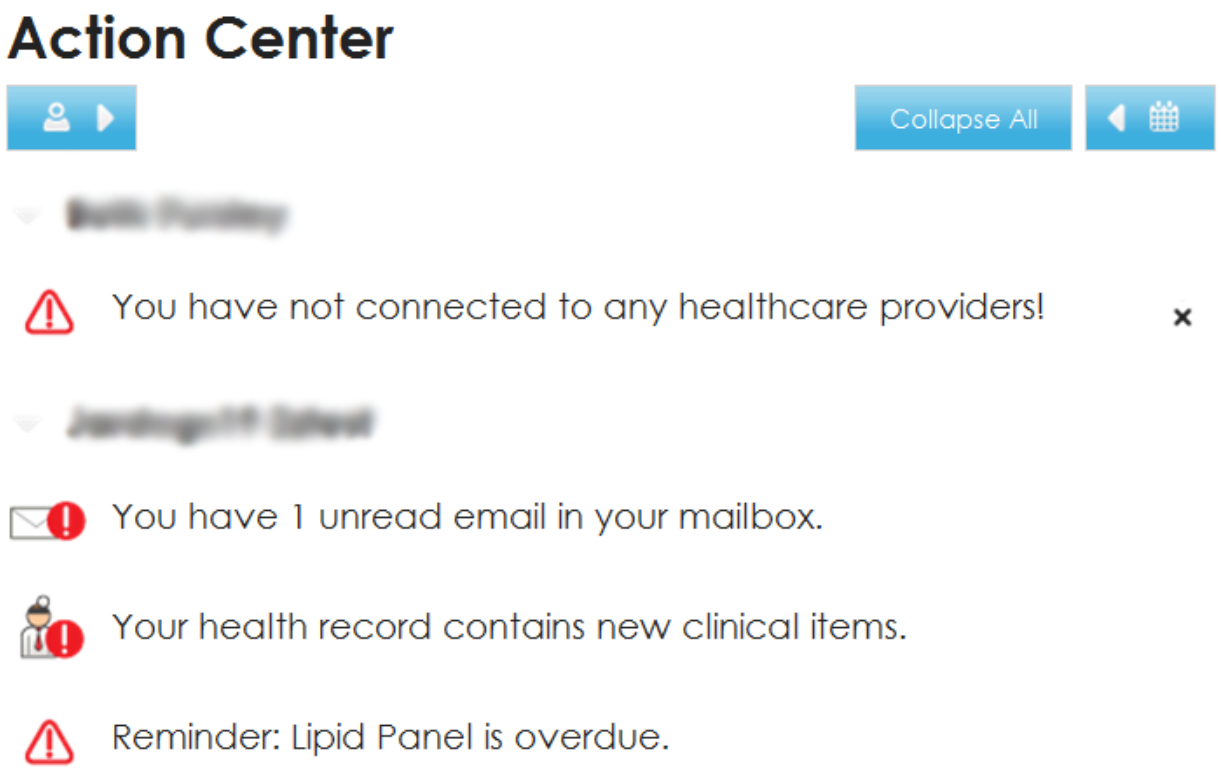
Action Center

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 a proxy 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 FollowMyHealth™ Patient Access. For example, select a clinical item from **Updated Clinical Items** and the clinical item opens as if you were in **My Health**. You can view the details from this window and print, fax, or email.

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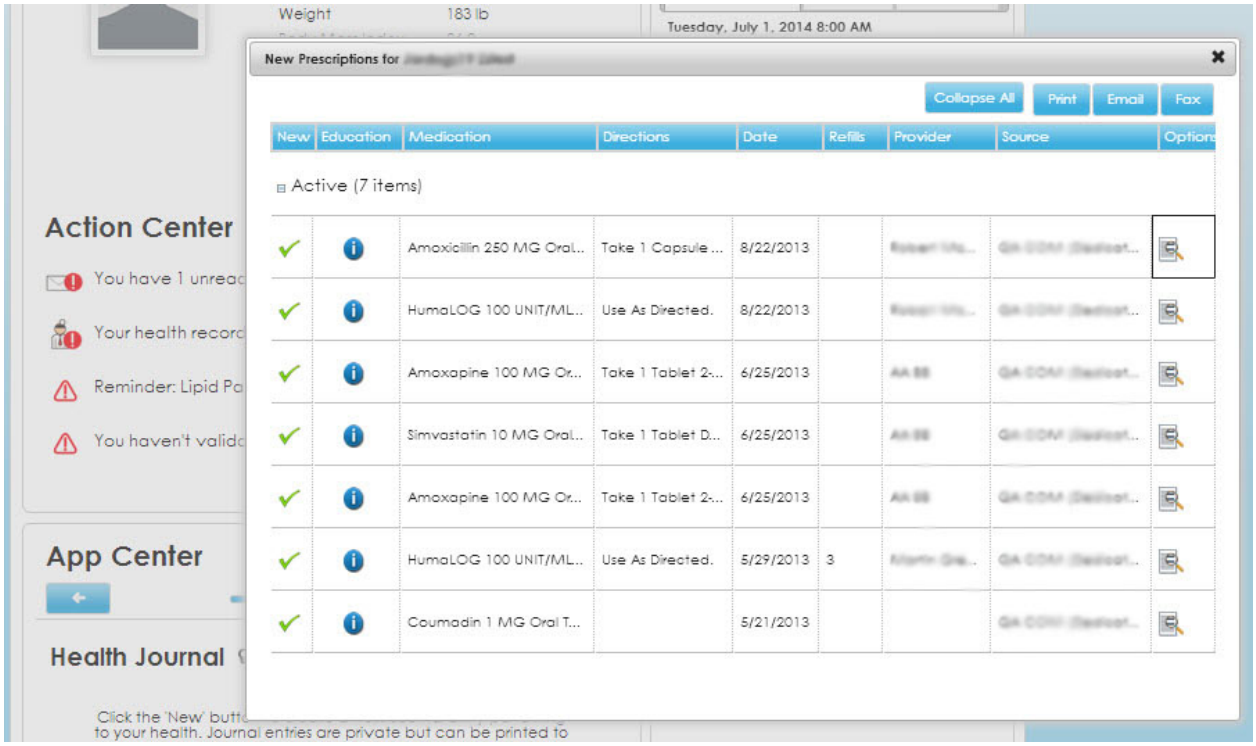

You can also launch InfoButton™ education without navigating to **My Health** or **Know My Health**.

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.

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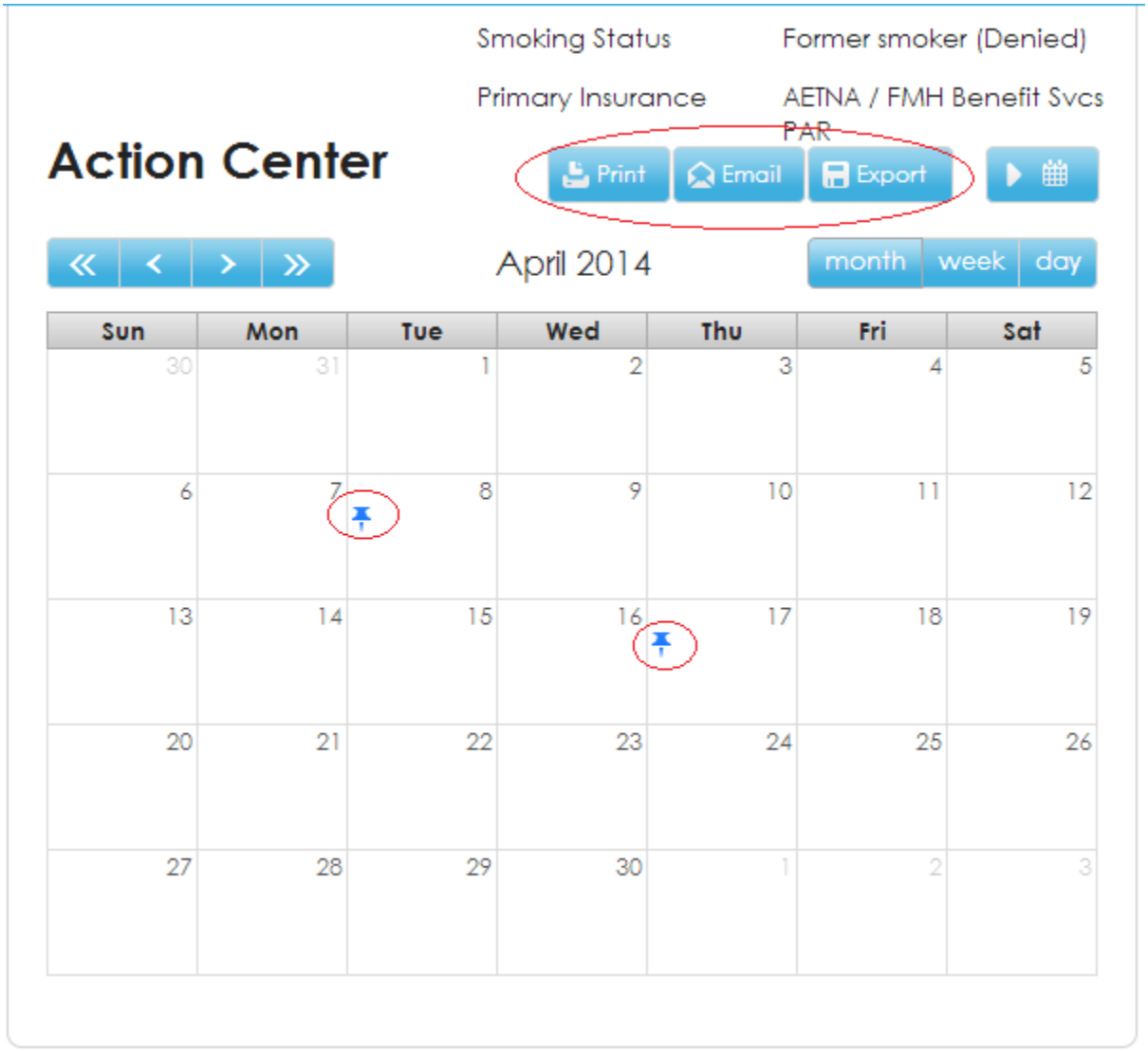

Recent Activity

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

To remove items from **Recent Activity**, click the delete icon × next to the item.

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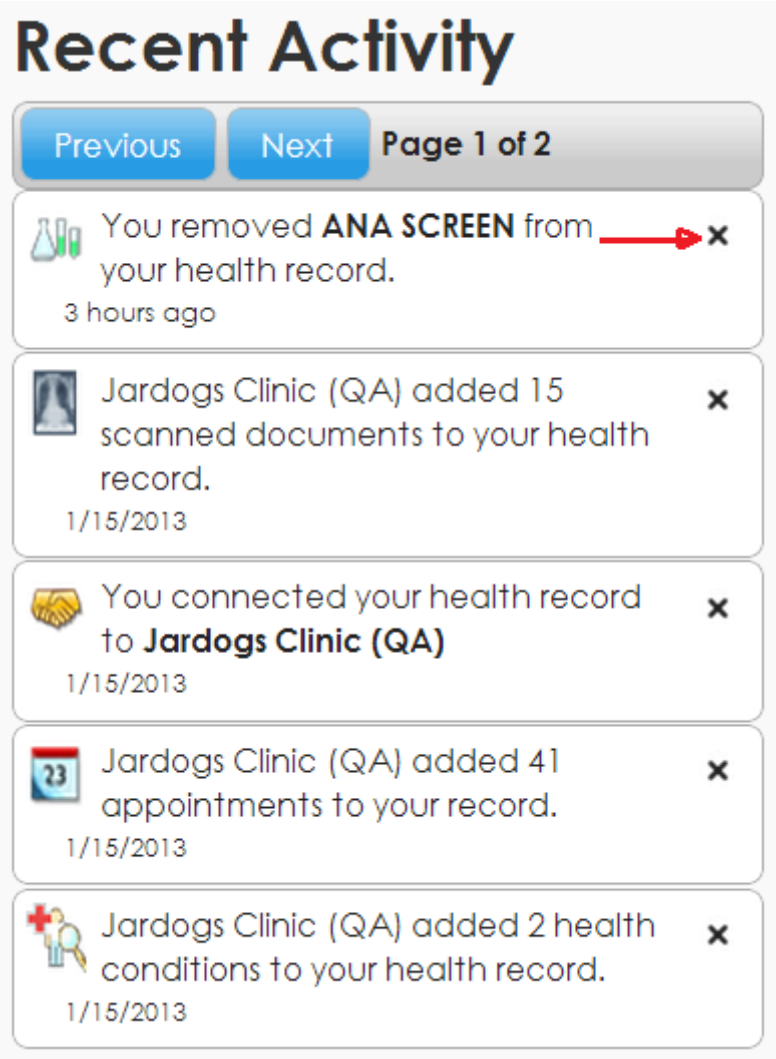

Appointments

You can view, request, schedule, reschedule and cancel in the **Appointments** section on the **Home** tab.

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.

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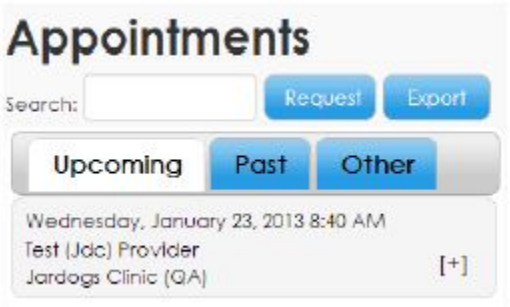
Past

This tab includes all past appointments.

Other

This tab includes all other appointments, such as canceled 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.

Request an appointment

This task has 9 steps.

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.

   Scheduling An Appointment opens.

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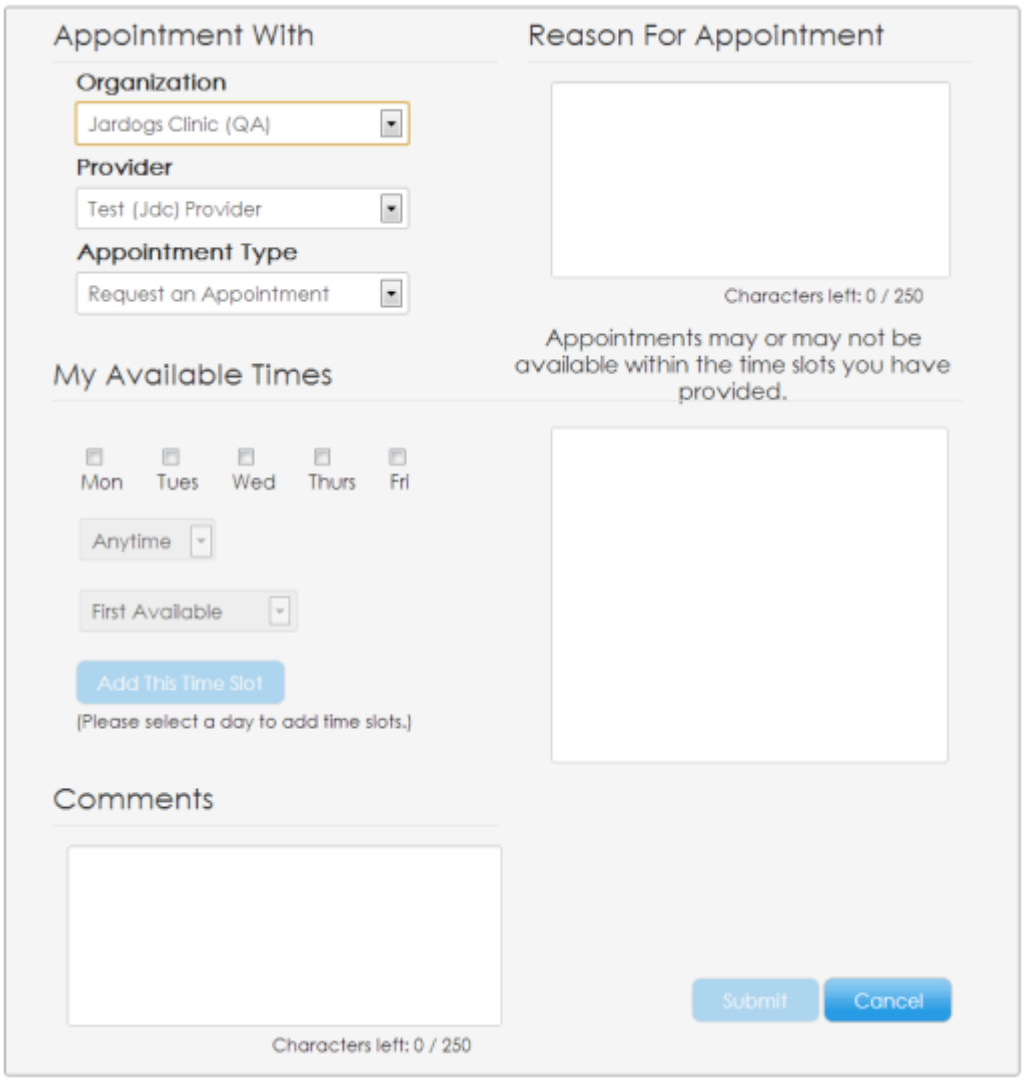

Figure 7: Scheduling An Appointment window

2. From **Appointment With**, select the provider, organization, and appointment type that you want.
   If you select an appointment type other than **Request Appointment**, your appointment is directly scheduled with the provider if the provider has direct scheduling enabled.
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 above the day of week that you want the appointment.

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5. Select a time and availability.
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.

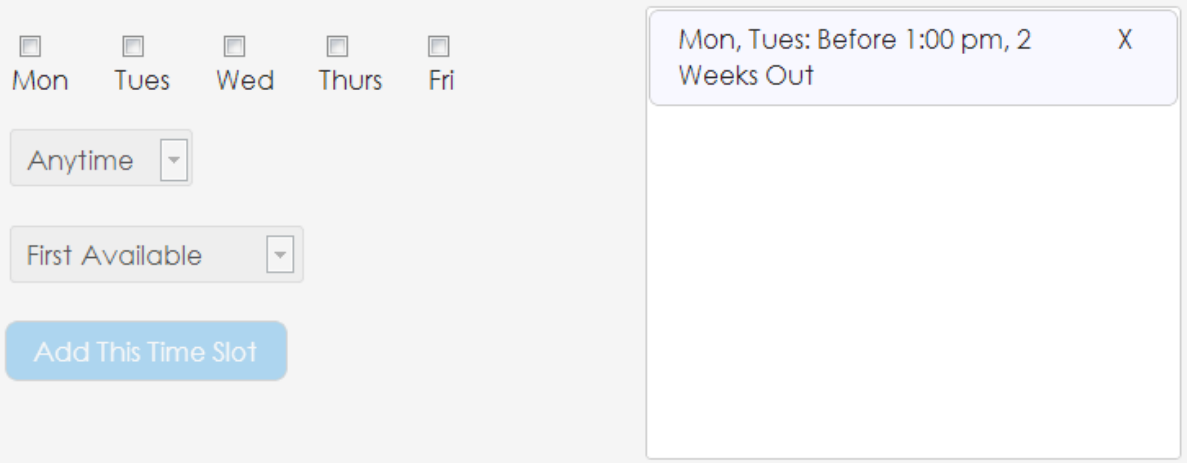

Figure 8: Appointment choices

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

You can directly schedule an appointment with your provider if direct scheduling is enabled.

Before you begin

Your provider or organization must have direct scheduling enabled. 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 **Request Appointment**. If there are not appointment types listed other than **Request Appointment**, direct scheduling is not enabled.

This task has 8 steps.

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1. From the **Appointments** section, click **Request**.

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

Scheduling An Appointment opens.

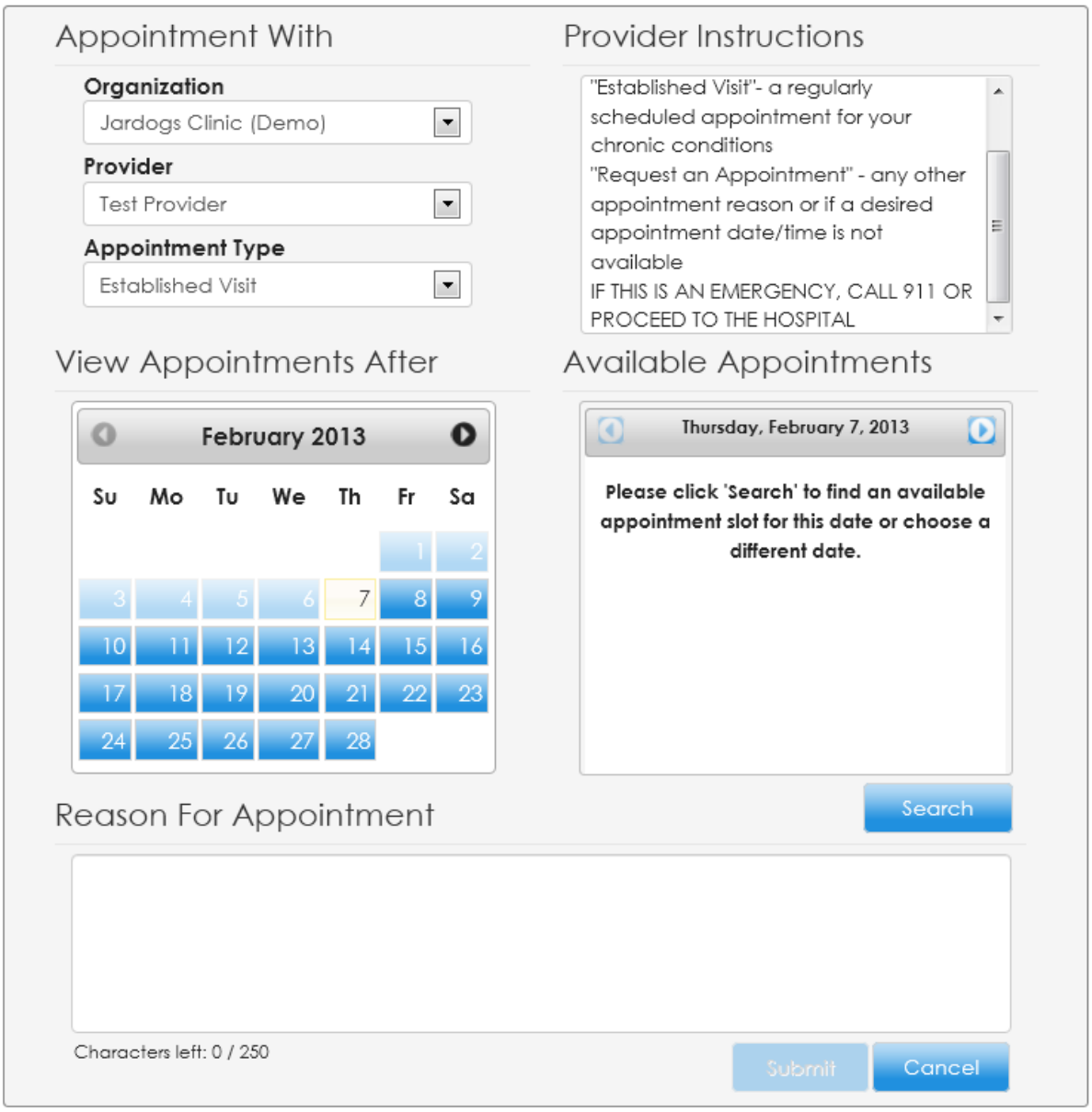

Figure 9: Scheduling An Appointment window

2. From **Appointment With**, select the provider, organization, and appointment type that you want.

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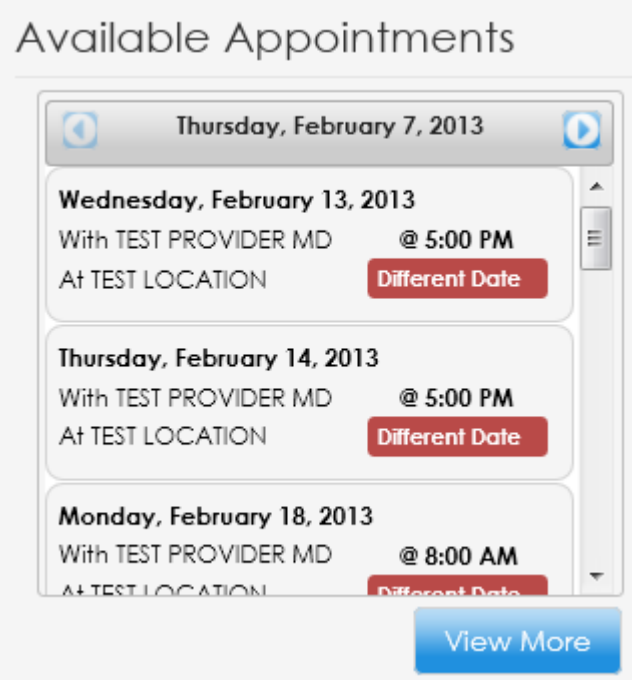
Select an appointment type other than **Request Appointment** so that you are directly scheduling an appointment.

3. From **Provider Instructions**, review the provider's instructions to assist you with the type of appointment to select.
   These instructions vary by organization.
4. 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.
5. 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.



6. Select the appointment that you want or click **View More** to see more appointment options.
7. From **Schedule An Appointment**, click **Submit**.
   A message is displayed to confirm that you scheduled an appointment.
8. Click **OK**.
   A message is displayed to confirm that your appointment is successfully reserved.

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Results of this task

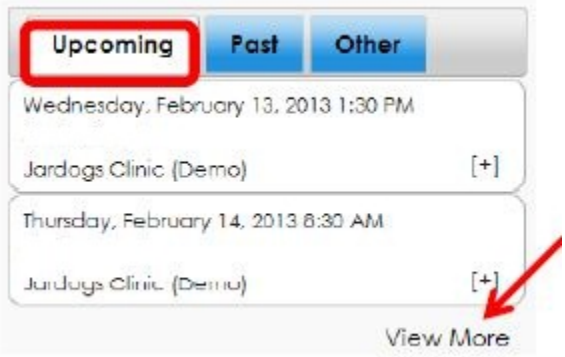
You have reserved an appointment with your provider. The appointment takes a few minutes to post to your health record.

> **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.

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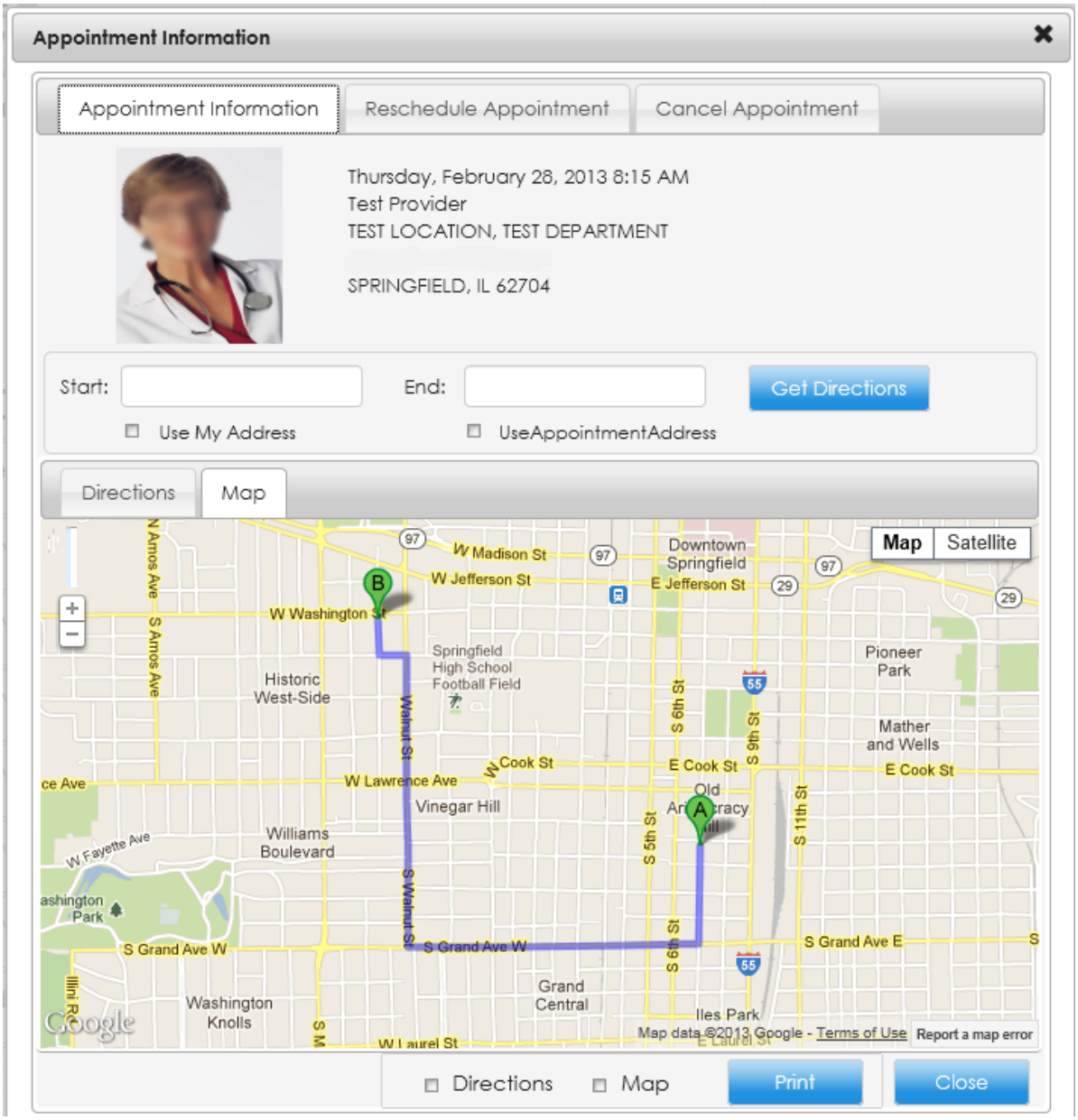

The appointment information, such as date, time, and location, are displayed at the top of the tab, along with a provider photo, if available.

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**.

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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.

1. Select an appointment from the **Upcoming** tab.
   Appointment Information opens.
2. Click the **Reschedule Appointment** tab.
   The **Reschedule Appointment** tab is displayed.

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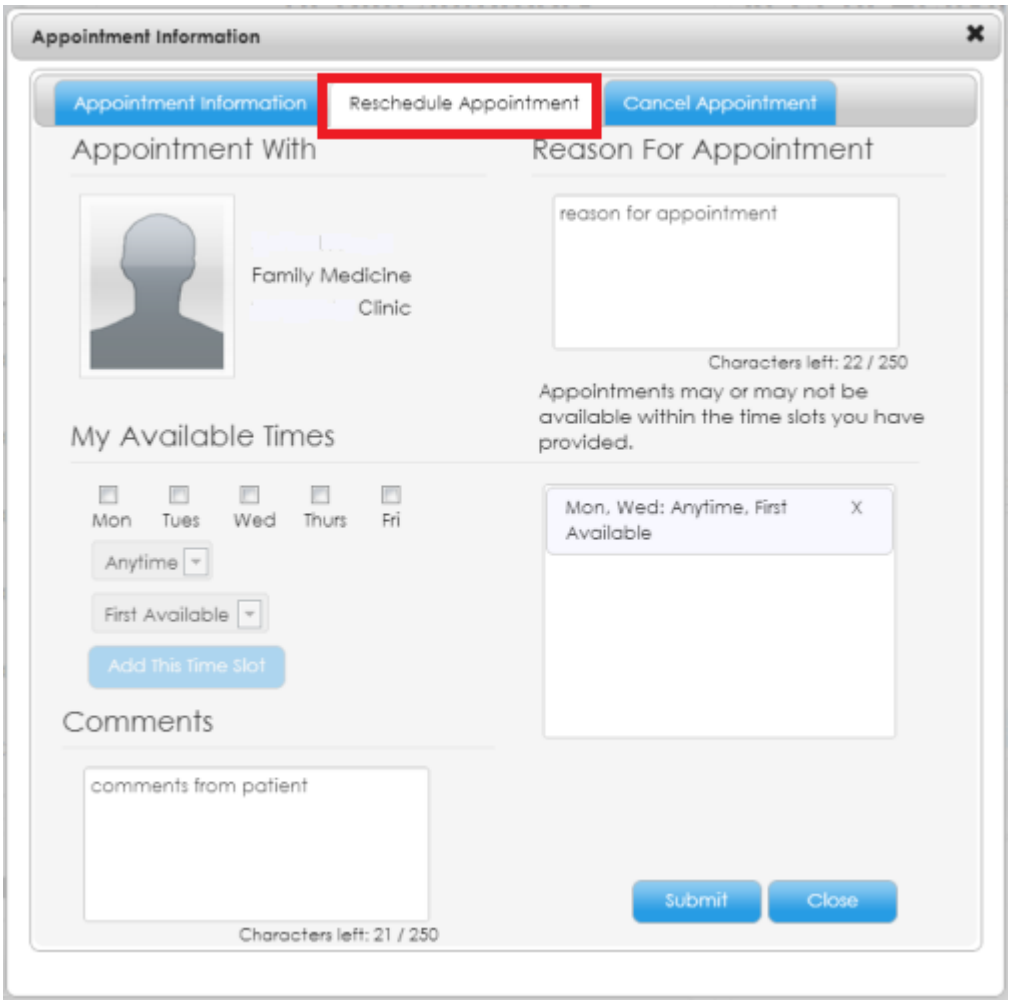

The organization and provider are automatically displayed based on the original appointment and cannot be changed. The reschedule appointment workflow is identical to the request appointment workflow.

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.

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Figure 10: Pending Reschedule label

Cancel an appointment

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

1. Select an appointment from the **Upcoming** tab.
   Appointment Information opens.
2. Click the **Cancel Appointment** tab.
   The **Cancel Appointment** tab is displayed.

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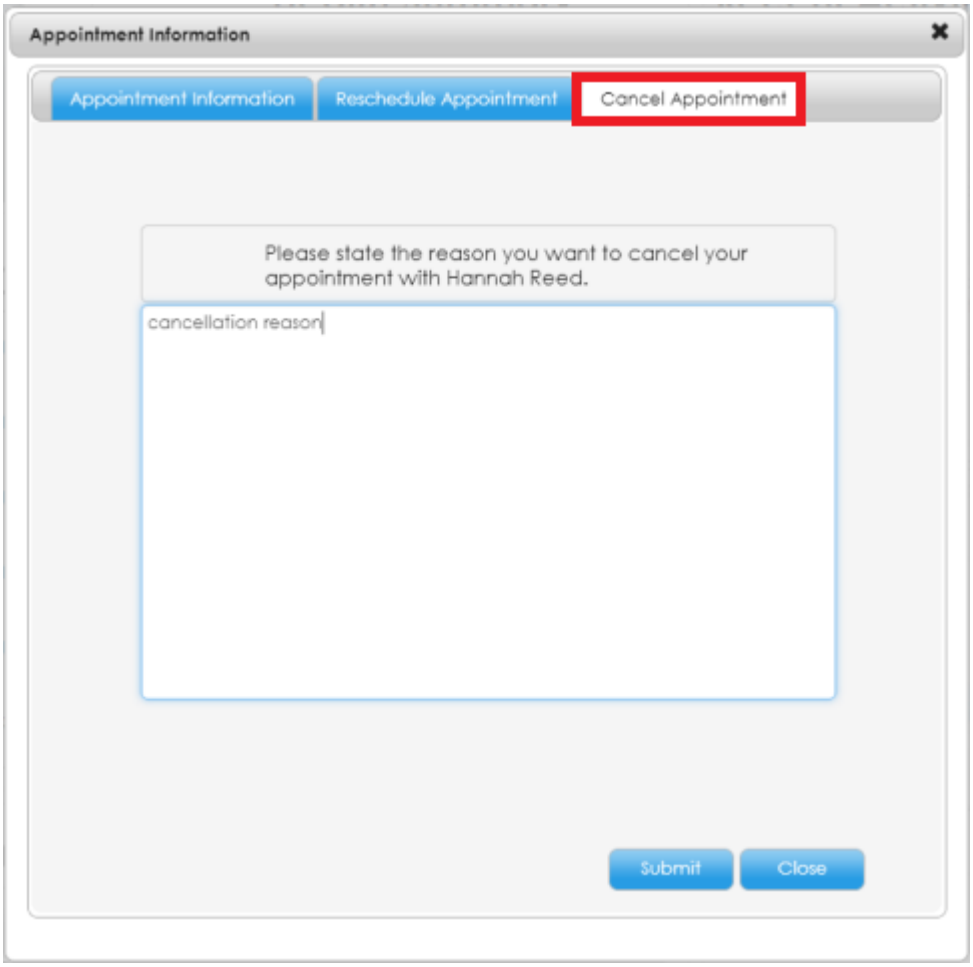

3. Enter a reason in the comments box to explain why you want to cancel the appointment and click **Submit**.
   A **Pending Cancellation** label is displayed with the appointment on the **Upcoming** tab until the appointment is canceled.

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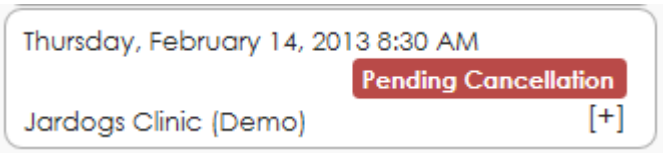
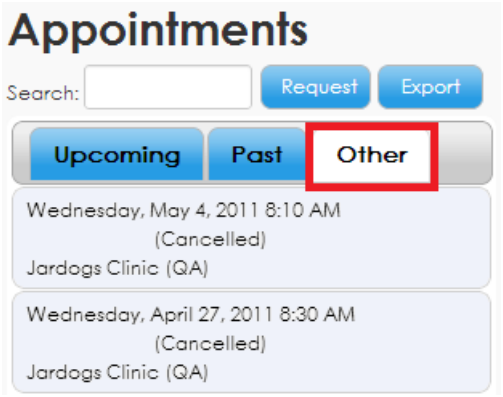


Figure 11: Pending Cancellation label

View past and other appointments

Past and other appointments are listed in the **Past** and **Other** tabs, located in the **Appointments** section.

1. Click the **Past** tab or **Other** tab.
2. To view appointment details, click the appointment in the list.



Appointment Information opens where clinical details or documents associated with this appointment are displayed.

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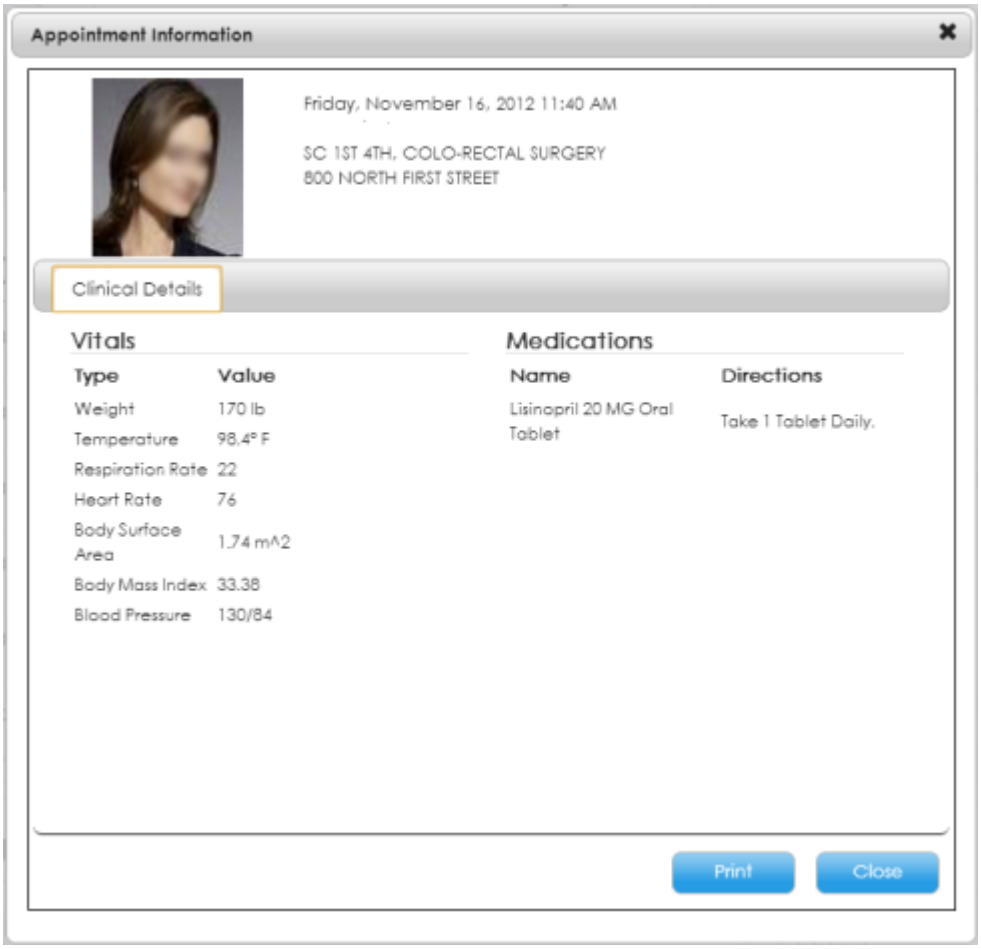

Figure 12: Clinical Details

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

Results of this task

You have viewed past or other appointments and printed the details.

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 log in of the day.

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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.

These applications integrate with FollowMyHealth™ and capture data to post to your health record.

- My Charts
- Health Journal
- Know My Health
- Withings Digital Scale
- Blue Button®
- Telcare Glucose Monitor
- Withings Blood Pressure Cuff
- Blood Sugar

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

Install applications

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

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App Store opens.

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2. Click **Install** for the application that you want add.
   The application automatically installs and is available in the browser. If you click **Uninstall**, the application is automatically removed and does not display when you browse your applications. There is no confirmation message.

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 on the icon, the application opens. Alternatively, use the backward and forward arrow icons to switch between applications.

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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 them to share with your provider.

This task has 7 steps.

1. To add a journal entry, click **New**.

A journal entry opens.

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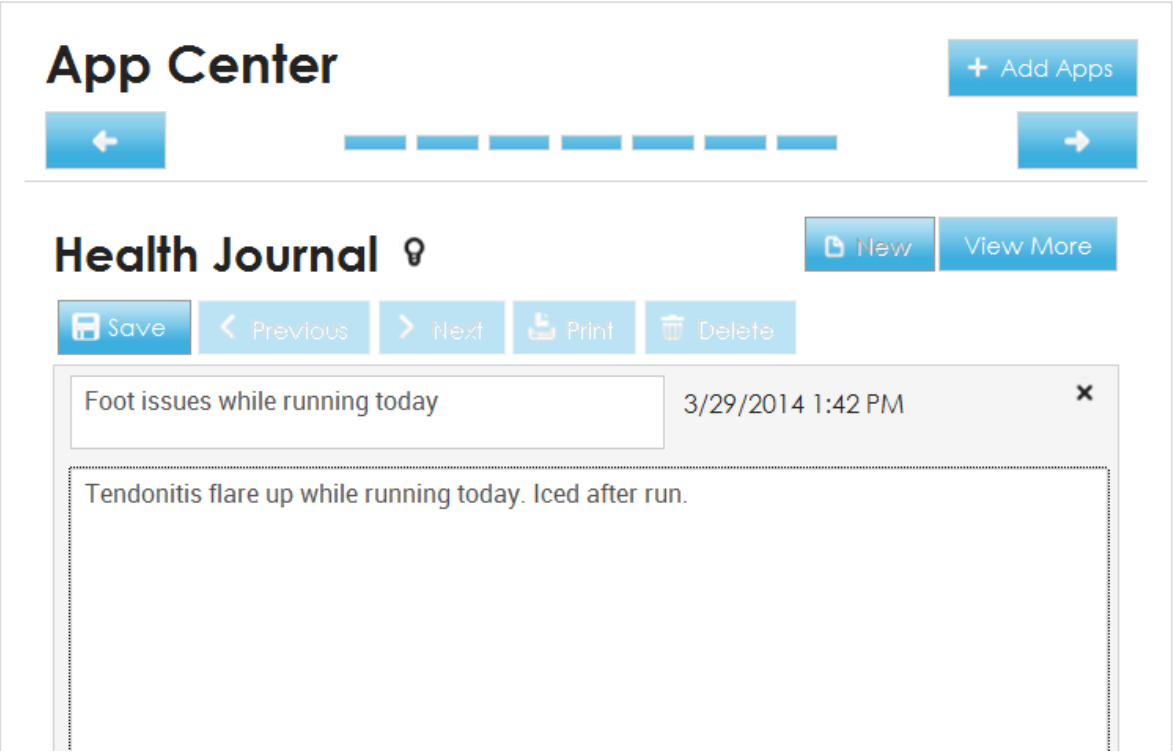

2. Enter a title and notes for the journal entry.

   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.

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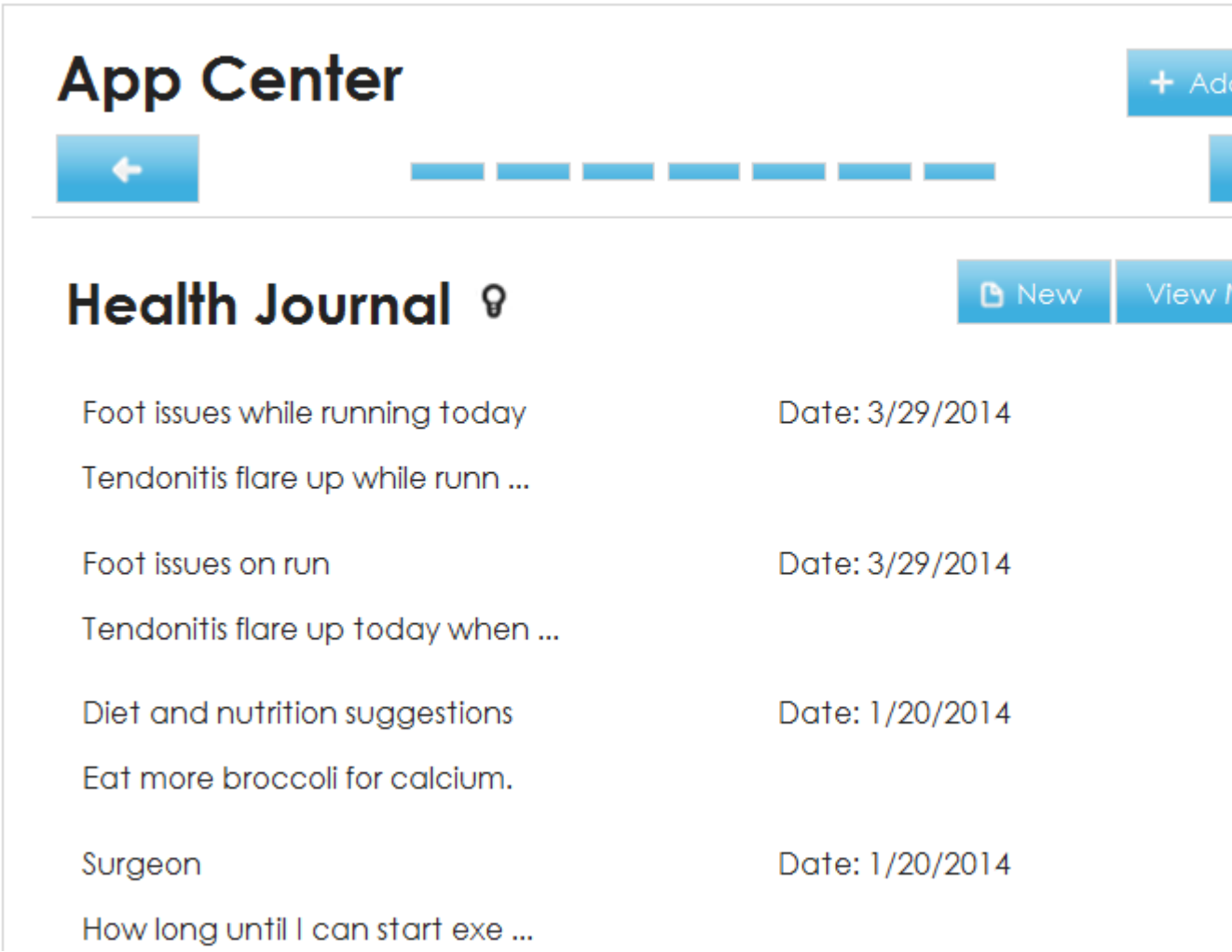

4. To view additional journal entries that are not displayed in **App Center** on the **Home** tab, click **View More**.
   Click the arrow on the journal entry to see the entry details and open the entry in Health Journal where you can edit, print, or delete the entry.
5. (Optional) To edit the entry, 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.

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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.

Manage My Charts data

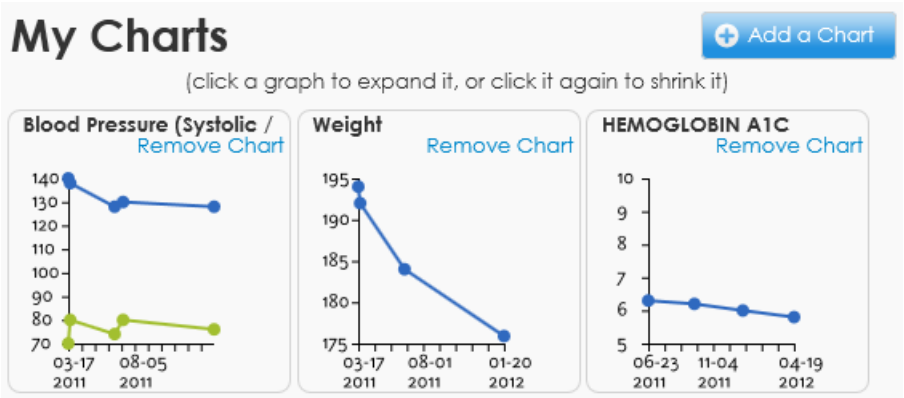
The My Charts application automatically displays charts for weight, blood pressure, and the top most resulted item in your FollowMyHealth™ account.

These charts are displayed by default as long as 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 vitals at home, they are displayed the next time you log in.

This task has 8 steps.

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



   The chart expands.

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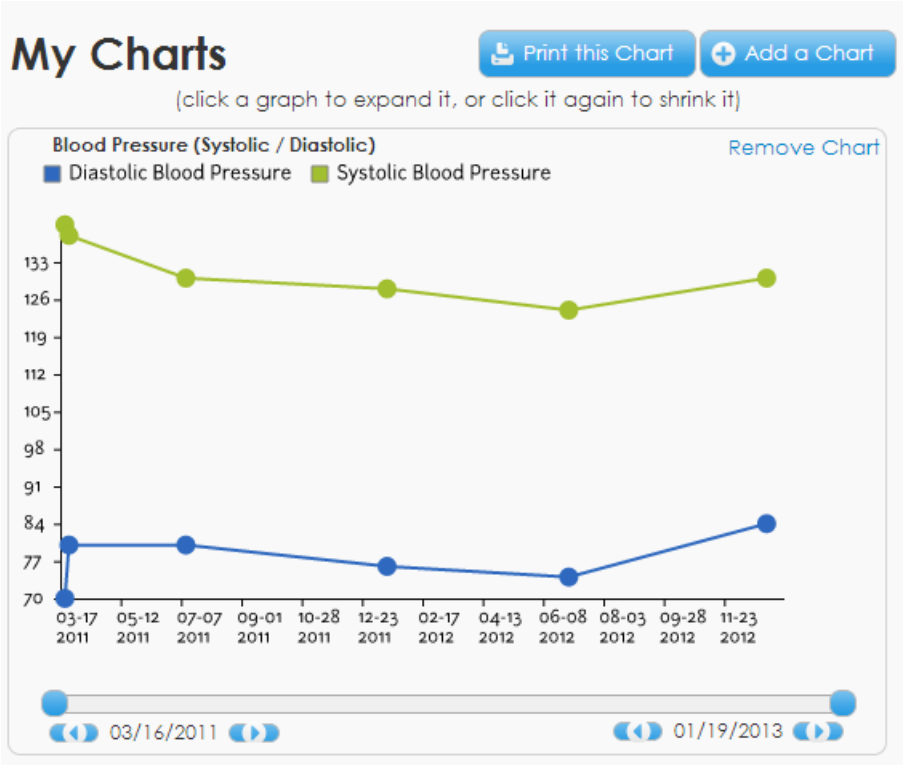

2. (Optional) To print the chart, click **Print this Chart**.
3. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.
4. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.
5. Click the graph title 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.

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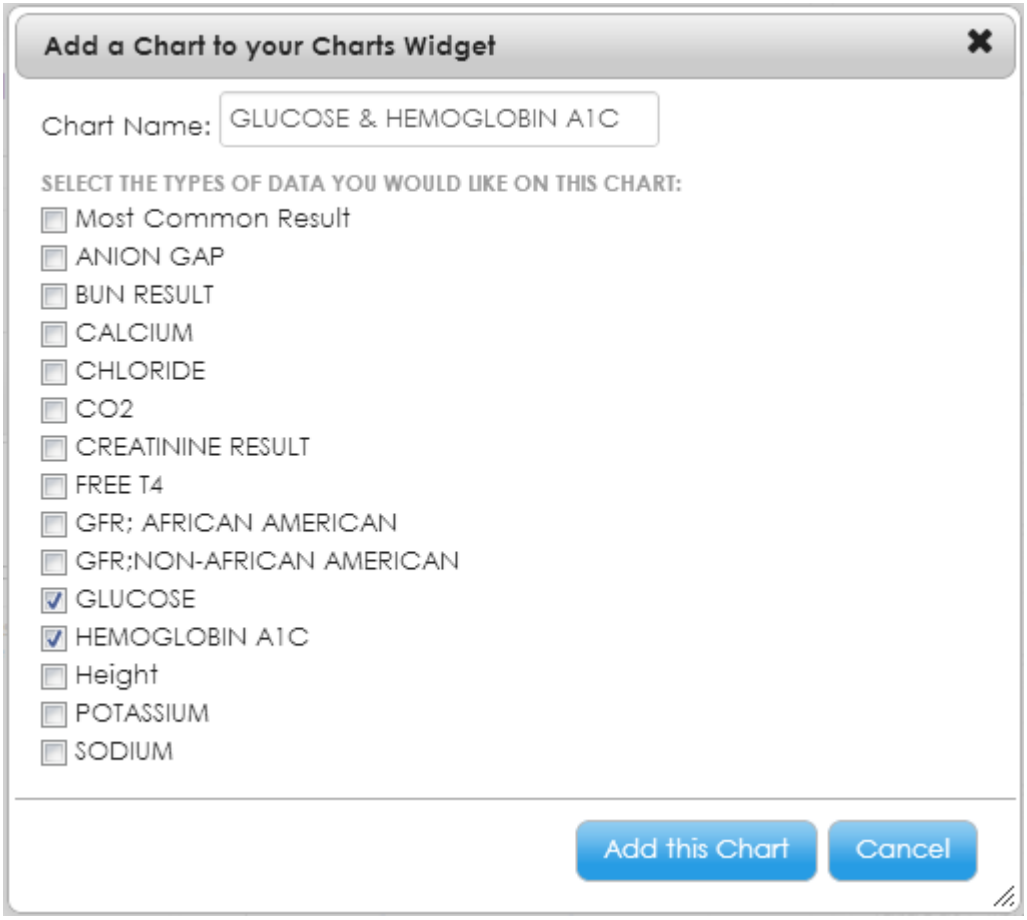

7. Select the type of data that you want to include in the chart.
   You can add any result type or vital sign that has more than 3 data points that can be graphed. You can also select more than 1 item for a single chart.

   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.

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Set up a Withings digital scale

The Withings Digital Scale application provides a link between FollowMyHealth™ and your personal Withings digital scale. You can weigh yourself and the data automatically uploads to FollowMyHealth™.

Before you begin

You must purchase a Withings digital scale and connect it to FollowMyHealth™. Click **Purchase a Withings Body Scale** to be directed to an online retailer where you can purchase the scale. Or, purchase your scale through another retail source.

1. From **App Center** on the **Home** tab, navigate to the Withings Digital Scale application.

2. Click **Connect a Withings Body Scale**.
   You are directed to the Withings website where **My Withings account** opens.

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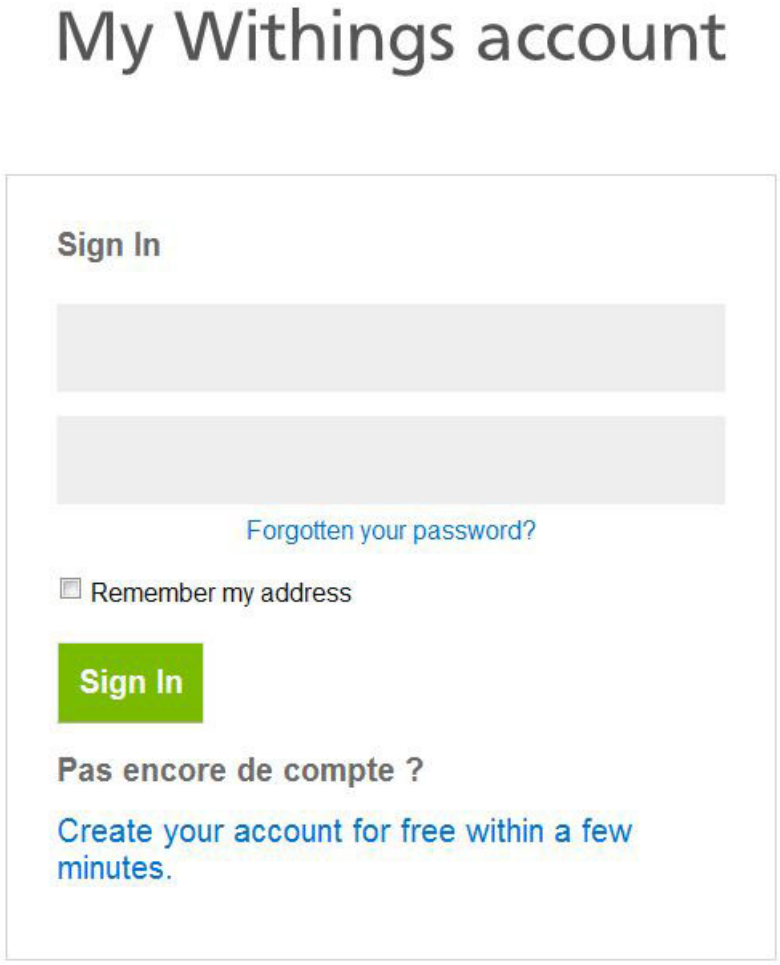

Figure 13: Withings account log on

If you do not have an account, click **Create your account for free within a few minutes**. **Register** opens where you can create an account.

3. Log on with the user name and password that you created when you created your Withings account.
   Authorize FollowMyHealth opens.

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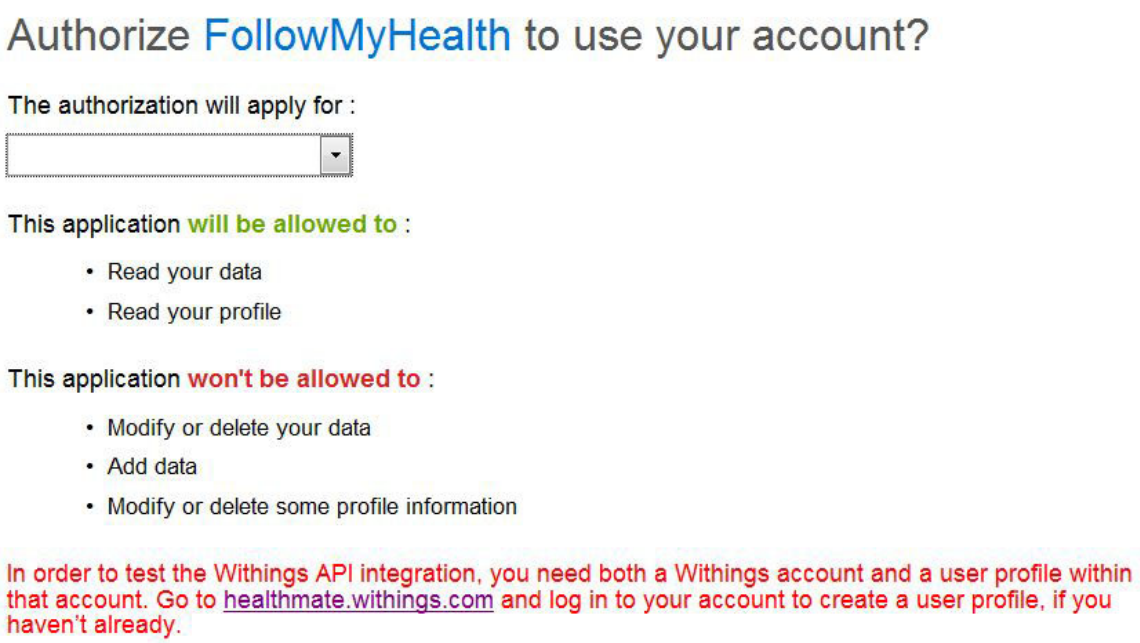

4. Follow the steps provided by the Withings web page to connect your scale.

Results of this task

The Withings digital scale is connected to the FollowMyHealth™ Withings Digital Scale application.

Set up a Withings blood pressure monitor

The Withings Blood Pressure Monitor application provides a link between FollowMyHealth™ and your personal Withings blood pressure monitor. You can take your blood pressure and the data automatically uploads to FollowMyHealth™.

Before you begin

You must purchase a Withings blood pressure monitor and connect it to FollowMyHealth™. From **App Center**, click **Purchase a Withings BP Monitor** to be directed to an online retailer where you can purchase the monitor. Or, purchase your monitor through another retail source.

1. From **App Center** on the **Home** tab, navigate to the Withings Blood Pressure Monitor application.

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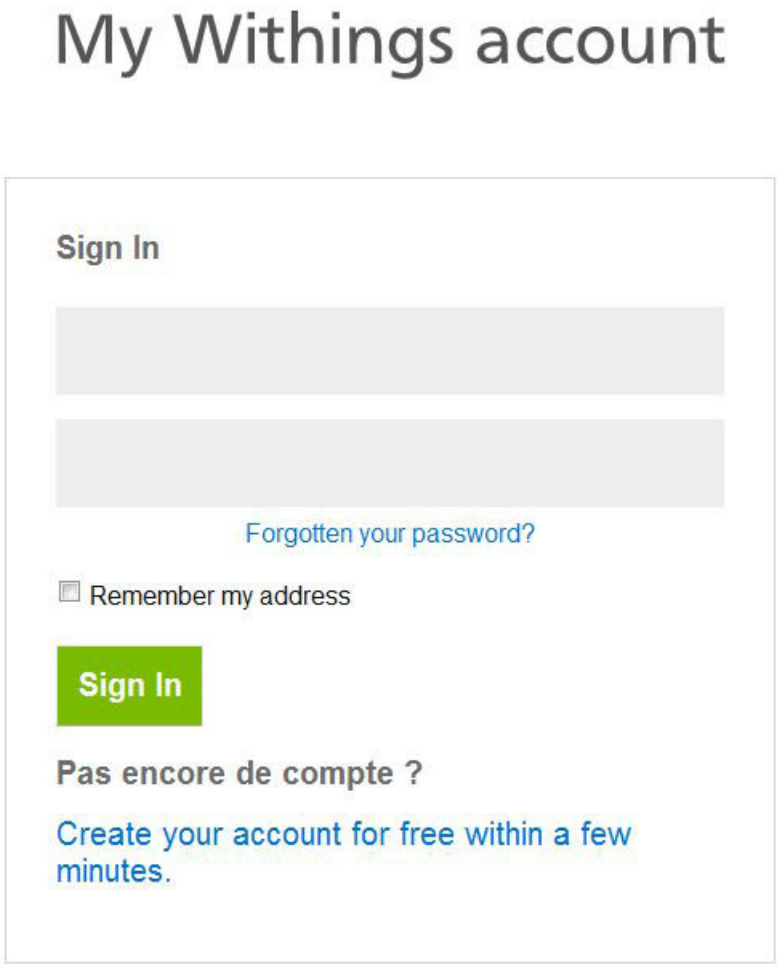
2. Click **Connect a Withings BP Monitor**.
   You are directed to the Withings website where **My Withings account** opens.



   If you do not have an account, click **Create your account for free within a few minutes**. **Register** opens where you can create an account.

3. Log on with the user name and password that you created when you created your Withings account.

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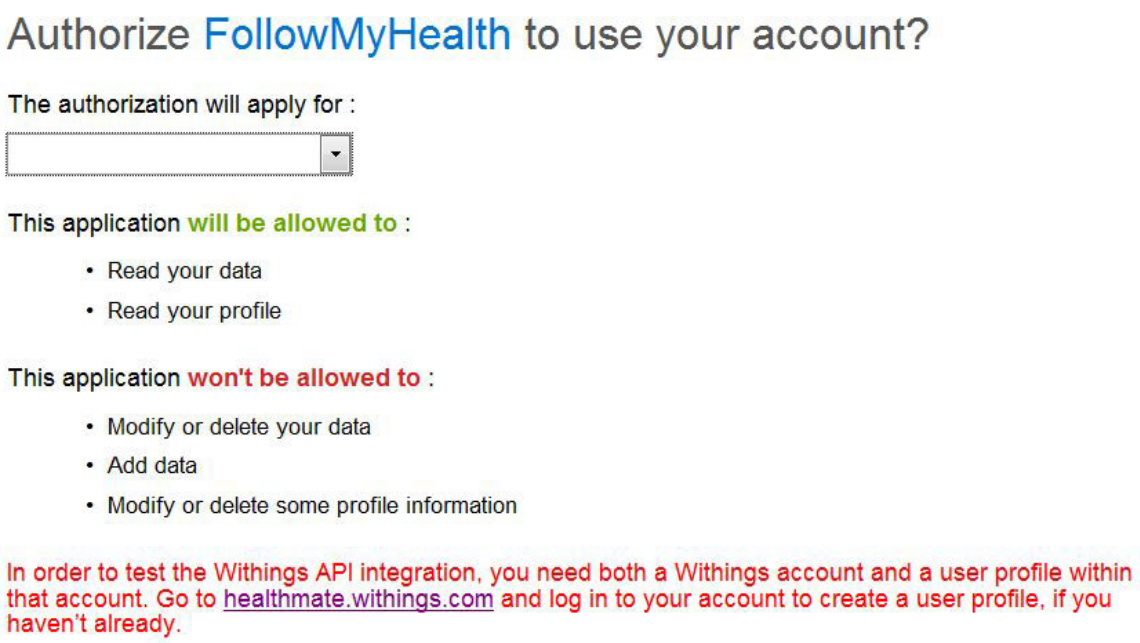
Authorize FollowMyHealth opens.



4. Follow the steps provided by the Withings web page to connect your blood pressure monitor.

Results of this task

The Withings blood pressure monitor is connected to the FollowMyHealth™ Withings Blood Pressure Monitor application.

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 care providers.

1. From **App Center** on the **Home** tab, navigate to the Blue Button® application.

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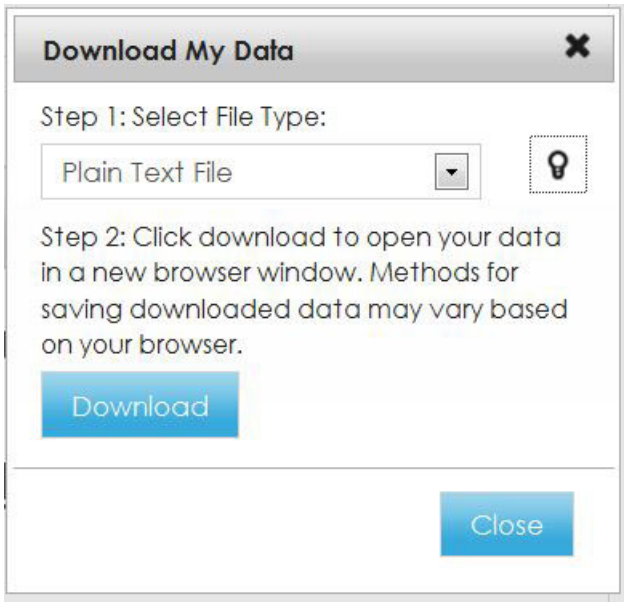
2. Click **Download My Data**.
   Disclaimer opens.
3. Click **Yes** to accept the disclaimer.
   You must accept the disclaimer before proceeding. This disclaimer states that you are responsible for sending your medical information outside of FollowMyHealth™.

   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 in the drop-down list.

Plain Text File

This option creates a file of your entire FollowMyHealth™ record in a format that is easy to read.

CCDA File

Some healthcare organizations will request your information in this file format.

HTML File

Some healthcare organizations will 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.

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Results of this task

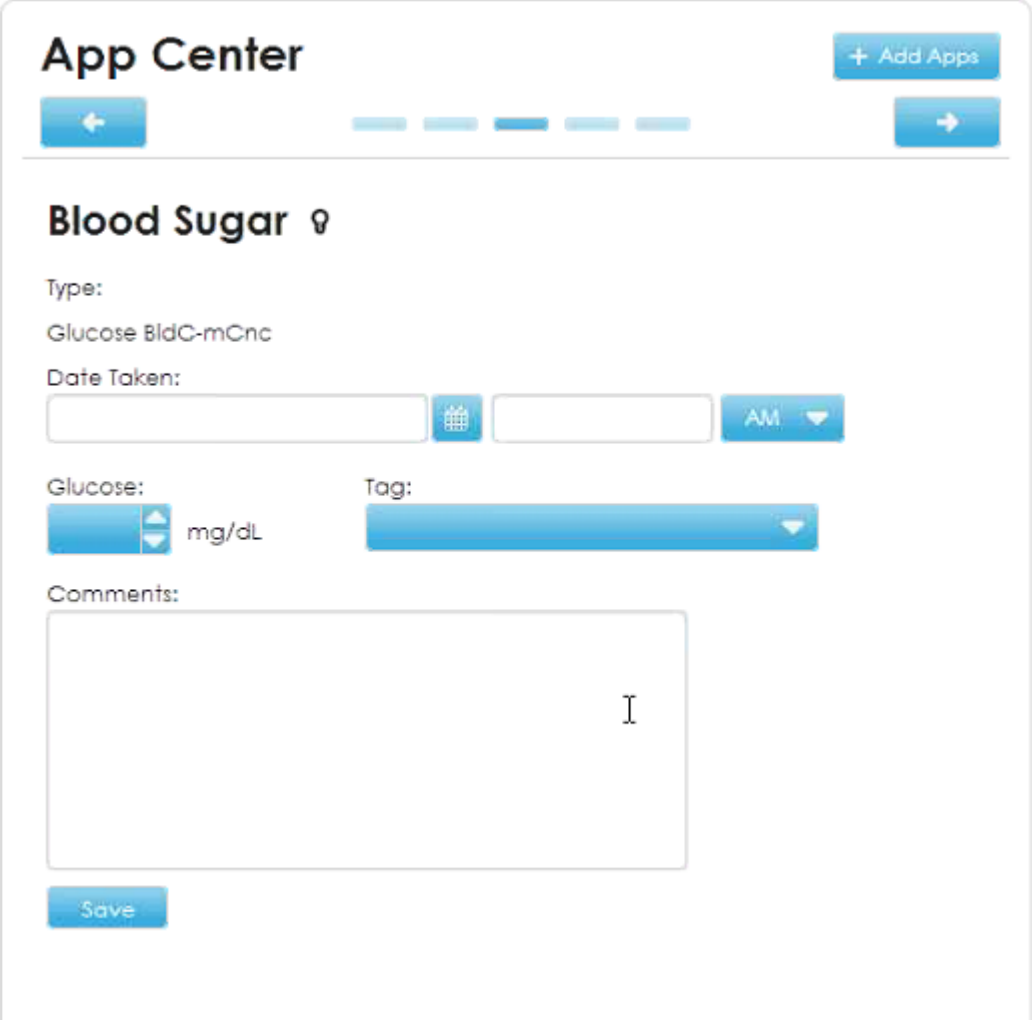
Your health information is downloaded and saved, and you can share the data with your healthcare provider.

Enter a blood sugar reading

Use the Blood Sugar application to manually enter your blood glucose reading in FollowMyHealth™.

This task has 7 steps.

1. From **App Center** on the **Home** tab, navigate 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.

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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.
   Such as, 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**.

Set up a Telcare blood glucose meter

The Telcare Blood Glucose Meter application 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 FollowMyHealth™.

Before you begin
You must purchase a Telcare blood glucose meter and connect it to FollowMyHealth™. From **App Center**, click **Purchase a Telcare Blood Glucose Meter** to be directed to an online retailer where you can purchase the monitor. Or, purchase your monitor through another retail source.

1. From **App Center** on the **Home** tab, navigate to the Telcare Blood Glucose Meter application.

2. Click **Connect a Telcare Blood Glucose Meter**.

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You are directed to the Telcare web page.

3. Log on with the user name and password that you created when you created your Telcare account.
4. 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 the FollowMyHealth™ Telcare Blood Glucose Meter application.

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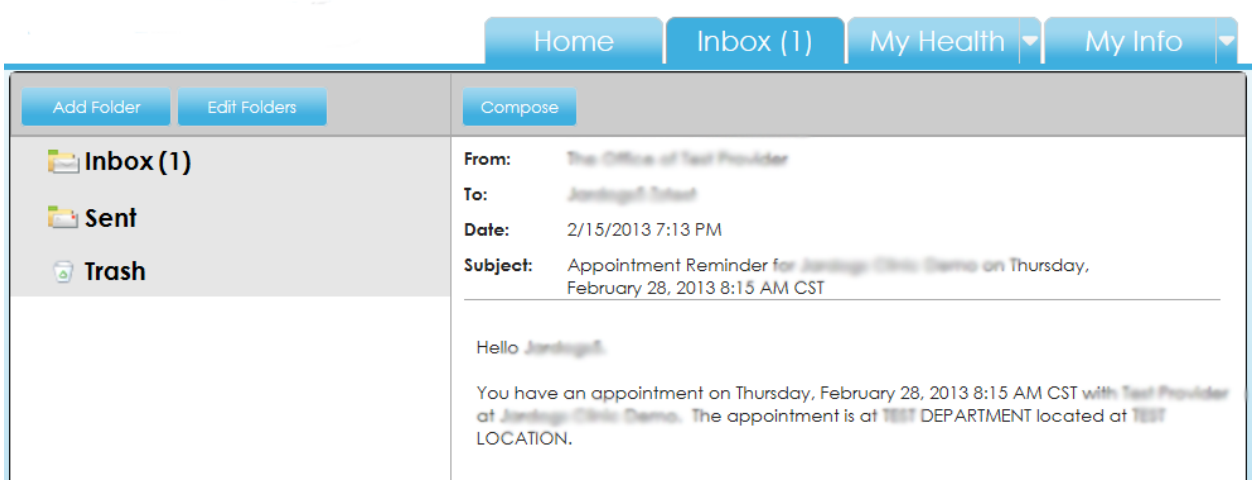
Chapter 5

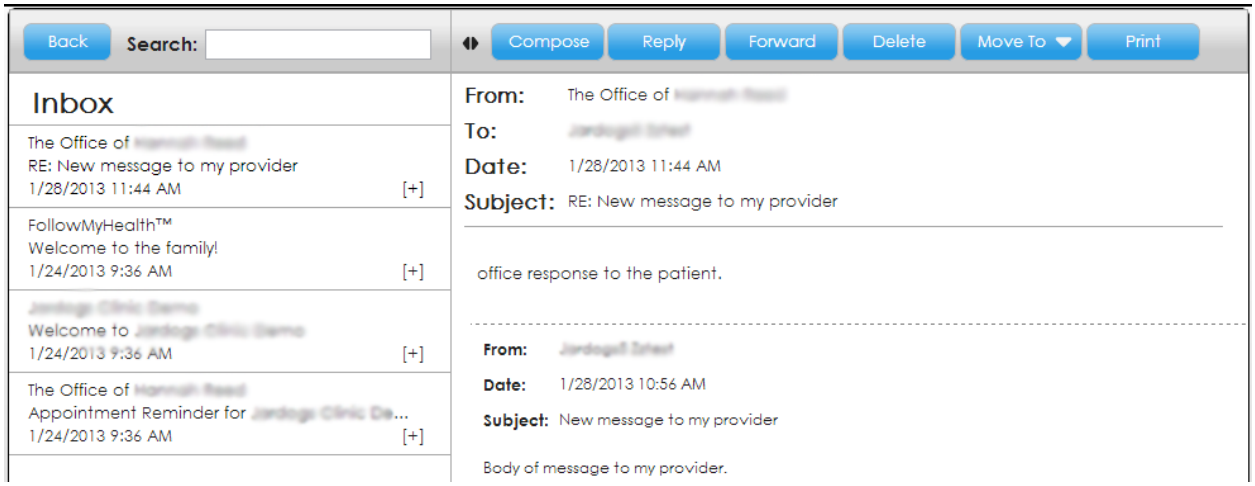
Inbox

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. By default, the **Inbox** tab contains **Inbox**, **Sent**, and **Trash** folders. You can create folders, nest multiple folders, and edit existing folders.



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.



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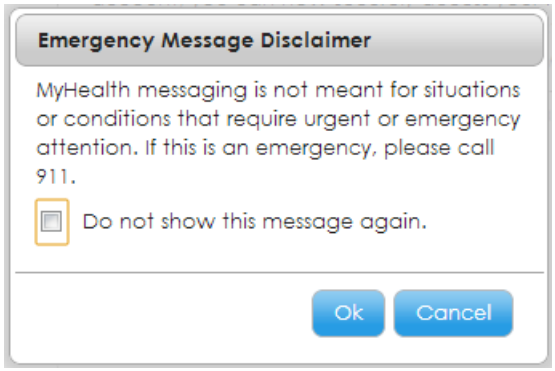
Compose email messages

> **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**.

This task has 5 steps.

1. Click the **Inbox** tab.
   Inbox opens.
2. Click **Compose**.
   Emergency Message Disclaimer opens each time you compose a 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. Enter the email recipient, subject, and message.
4. Click **Send**.
   If you are emailing a form, a window opens to inform you that you cannot change the form after it is emailed.
5. Click **Send**.

Create and edit inbox folders

This task has 7 steps.

1. Click the **Inbox** tab.

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Inbox opens.

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**.

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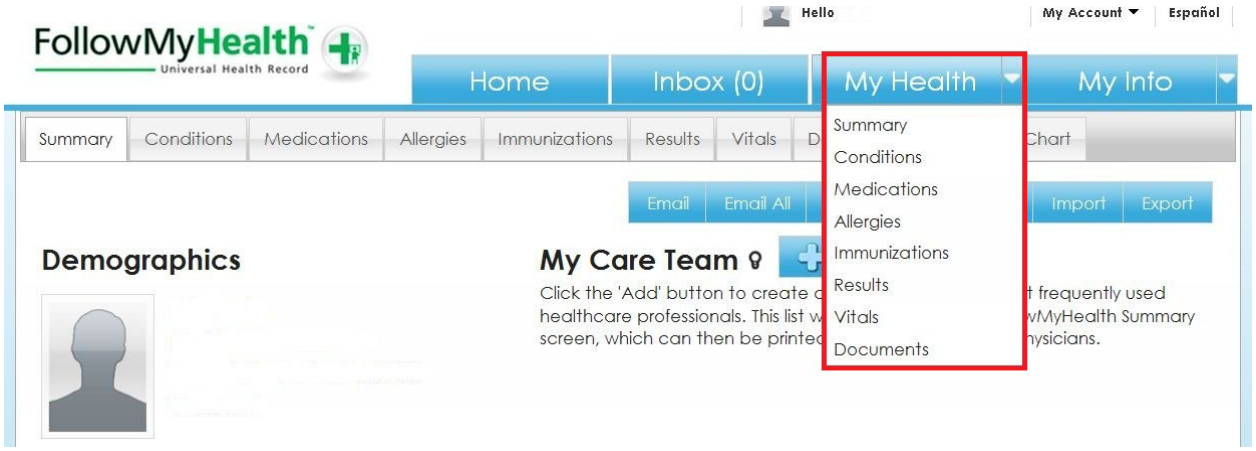
Chapter 6

My Health

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

You can view all sections of **My Health** on the **Summary** tab, or, you can navigate 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).

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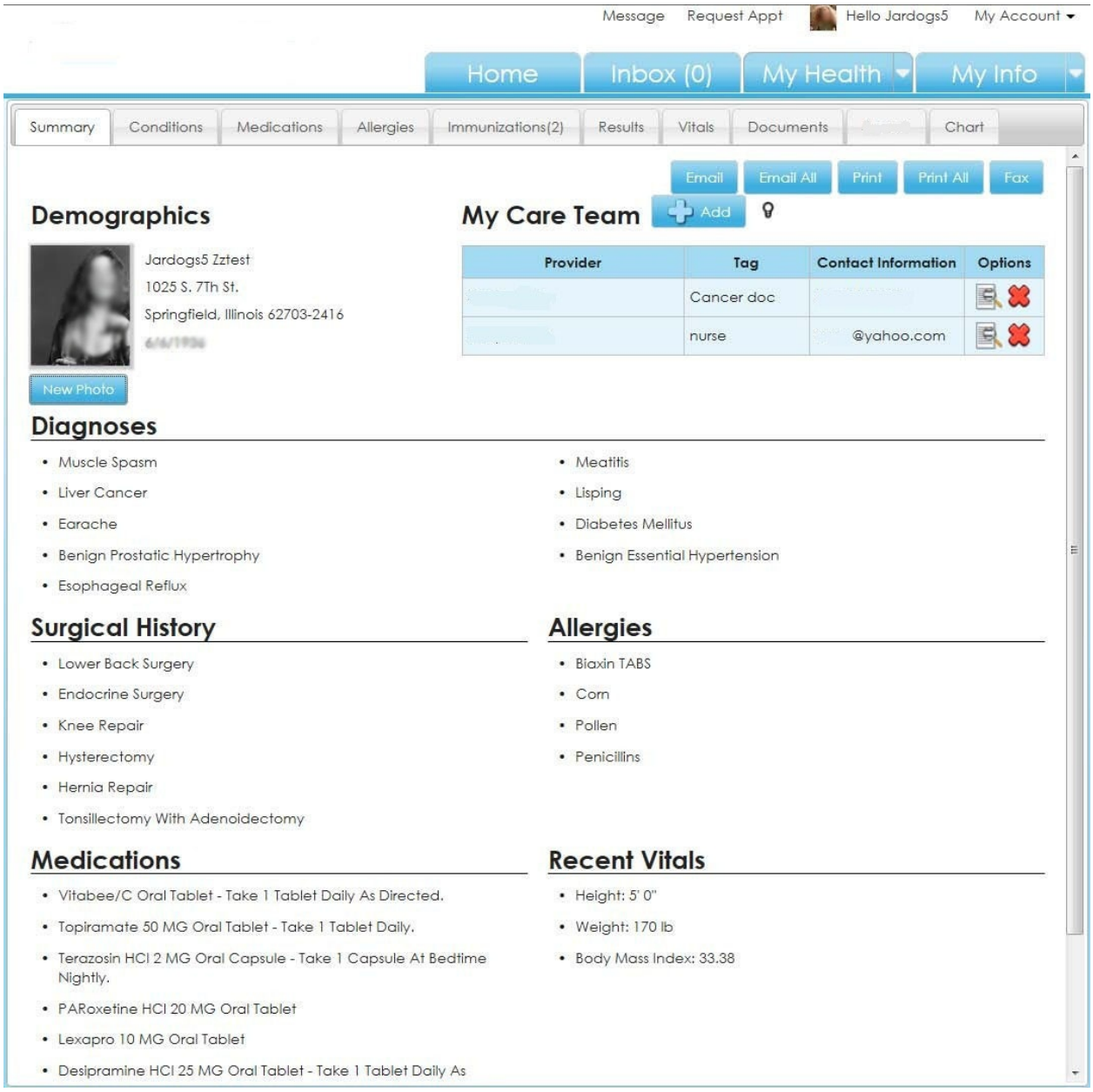

Figure 14: My Health summary

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**.

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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

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 Info > Providers**. **My Care Team** is intended as a quick reference to healthcare providers.

This task has 8 steps.

1. From **My Health**, click the **Summary** tab.
   The **Summary** tab is displayed.
2. Click **Add Provider**.

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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 asking you 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.

This task has 5 steps.

1. From **My Health**, click the **Summary** tab.
   The **Summary** tab is displayed.
2. Click **Export**.
   Export/Download your Health Record opens.

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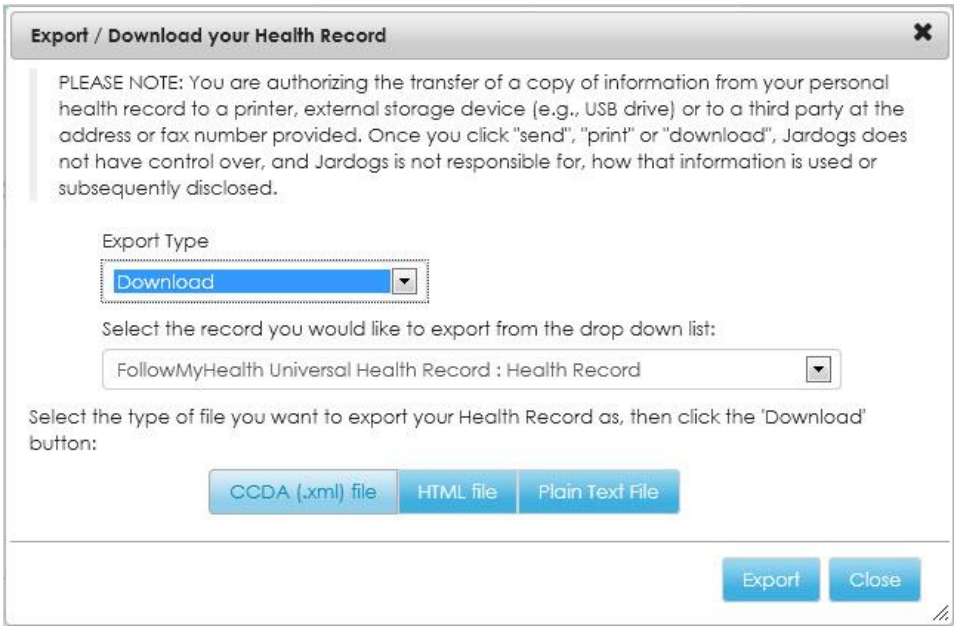

3. For **Export Type**, select if you want to download or transmit your document.
   - **Download**: Specifies that you want to download your file to your computer or other storage device. This is the default export type. If you select **Default**, you can download the file as a Consolidated-Clinical Document Architecture (C-CDA) XML file, an HTML file, or a Plain Text file (human readable format).
   - **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: **Send Plaintext** or **Send CCD**, and enter the **Direct Address**.

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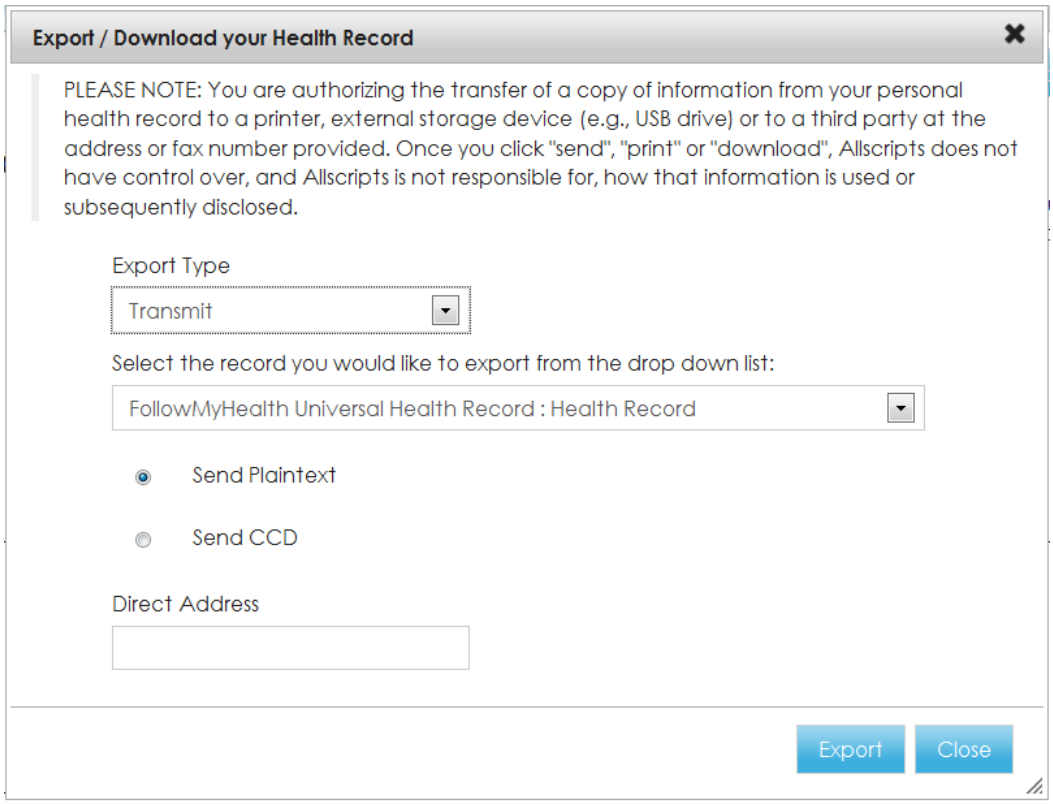

> **Important:** A Direct Address is a specialized communication method used by healthcare providers. If you do not know your provider's Direct Address, be aware that attempting to transmit to a regular email address does not work. To send data from **My Health** to an email address, use the **Email** 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.
5. Click **Export**.

Results of this task

Your document is exported.

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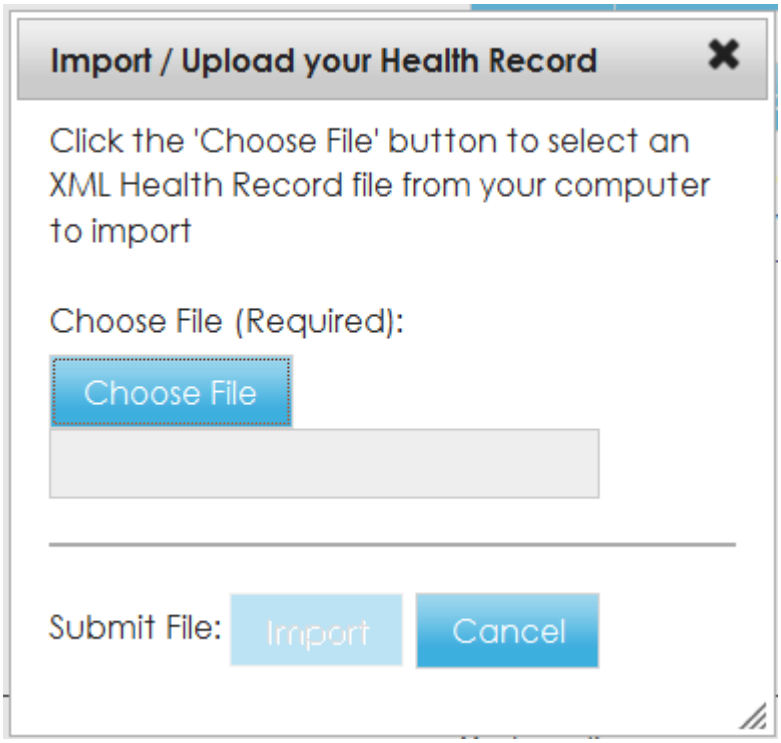
Import health summary documents

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.

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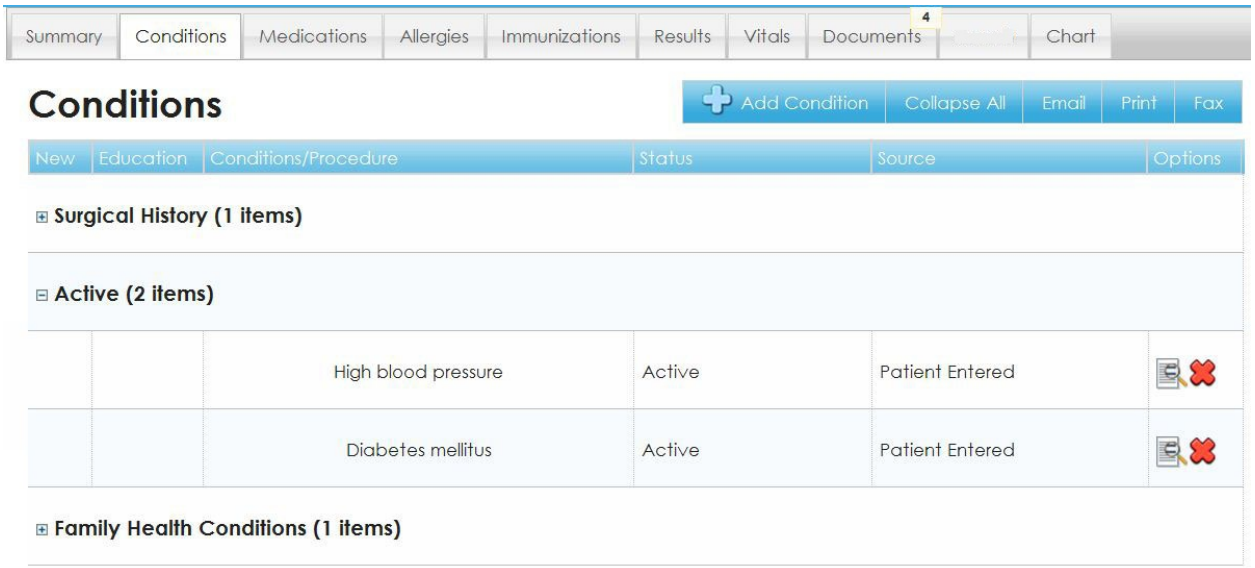
Conditions

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.



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.

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.

This task has 6 steps.

1. From the **Conditions** tab on **My Health**, click **Add Condition**.
   Add Health Condition opens.
2. For **Type**, select **Health Condition**.

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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**.
   The condition is listed under **Active**.

Add a surgical history condition

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

This task has 8 steps.

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 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. Enter the date of the surgery in **Procedure Date**.
6. Enter the name of the provider that performed the surgery in **Provider**.
7. Enter related comments in **Comments**.
8. Click **Save**.
   The condition is listed under **Surgical History**.

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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 proxy access to other patients that are family members, the patient can update the family members' health history at the same time.

This task has 8 steps.

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 type 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 a proxy, **Family Health Condition** opens. The patients that you are a proxy for are displayed in the window. Select family members that the health condition also applies to.

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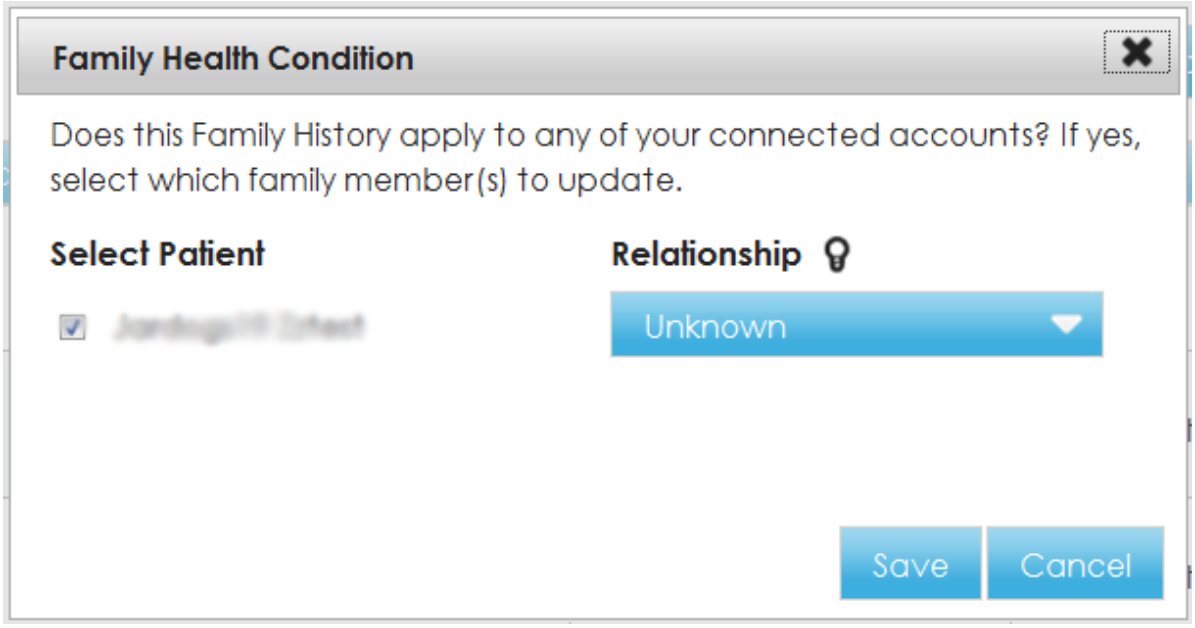

8. Click **Save**.

Results of this task

The condition is listed under **Family Health Conditions** for you and the family members that you are a proxy for.

Add a personal health condition

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

This task has 6 steps.

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**.

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Active

Specifies an issue that is currently active.

Resolved

Specifies an issue that used to be active, but is no longer active.

Denied

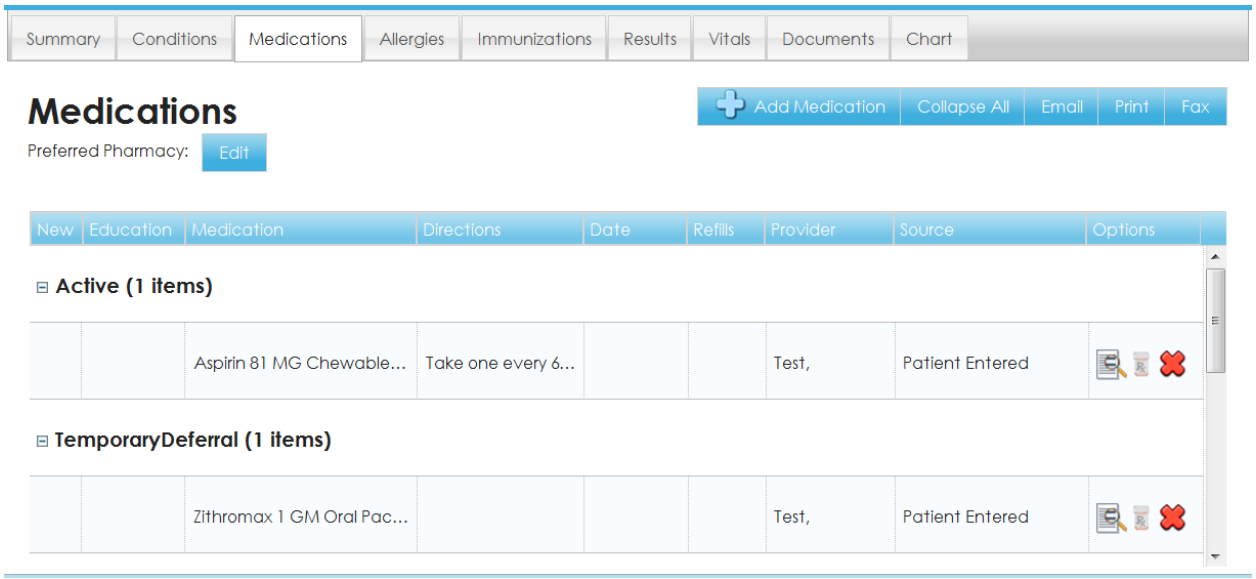
Specifies an issue that should not be included in your personal health condition history.

5. For **Comments**, enter related comments.
6. Click **Save**.
   The condition is listed under **Active**.

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.

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To view education information about a medication, click in the **Education** column.

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

Add a medication

This task has 7 steps.

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 a medication that was added and there is a hold on the medication until your provider confirms. This medication is added under the **TemporaryDeferral** section.

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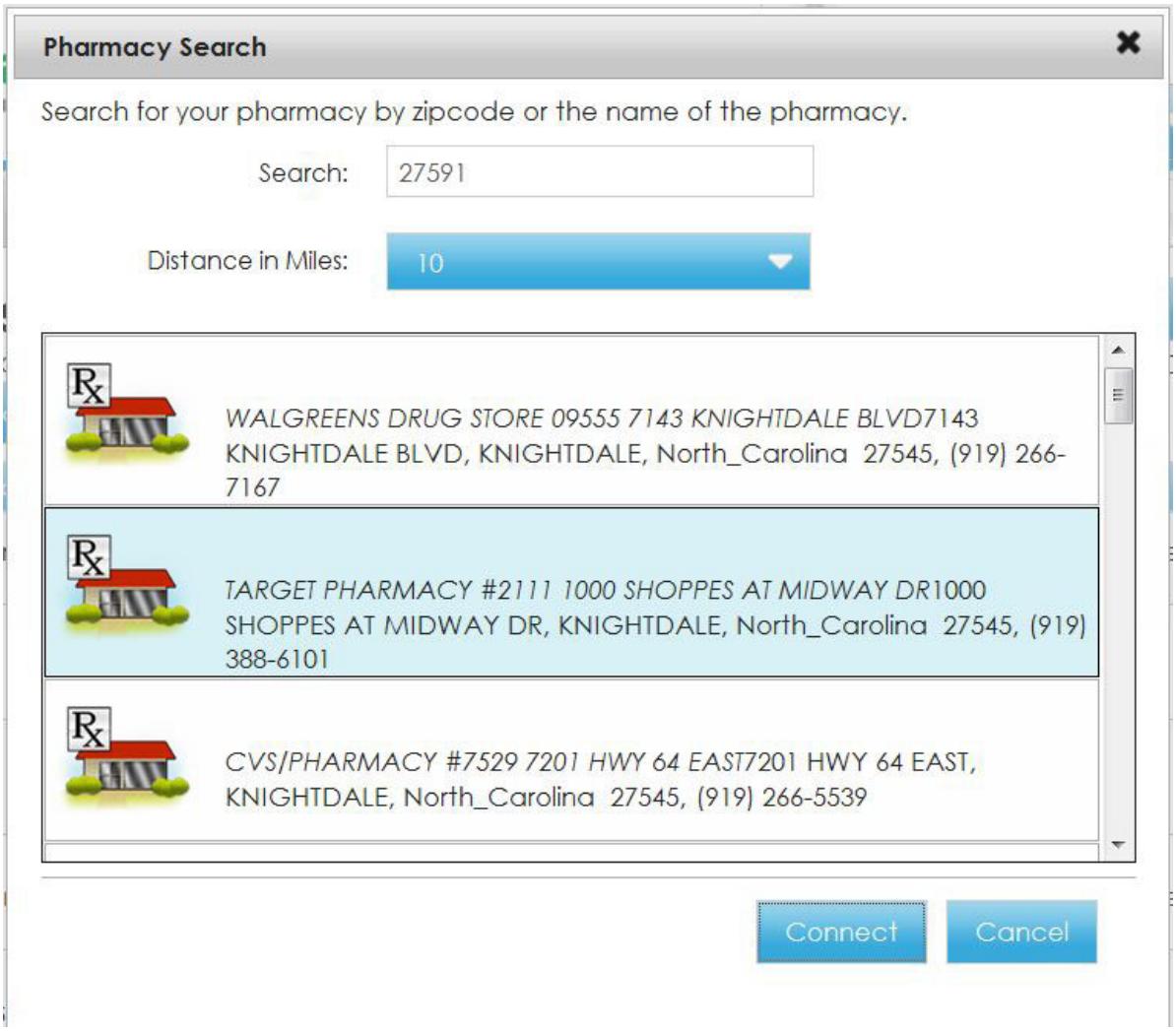
5. For **Provider**, enter the provider who prescribed the medication.
6. For **Comments**, enter related comments.
7. Click **Save**.
   The medication is listed under **Active**.

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.

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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. FollowMyHealth™ 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**.

Request a medication renewal

You can request a prescription renewal for a medication if the provider who prescribed that medication has enabled online requests. If you use the online request, there is no need to call the office to request the renewal.

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

This task has 6 steps.

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 opens.

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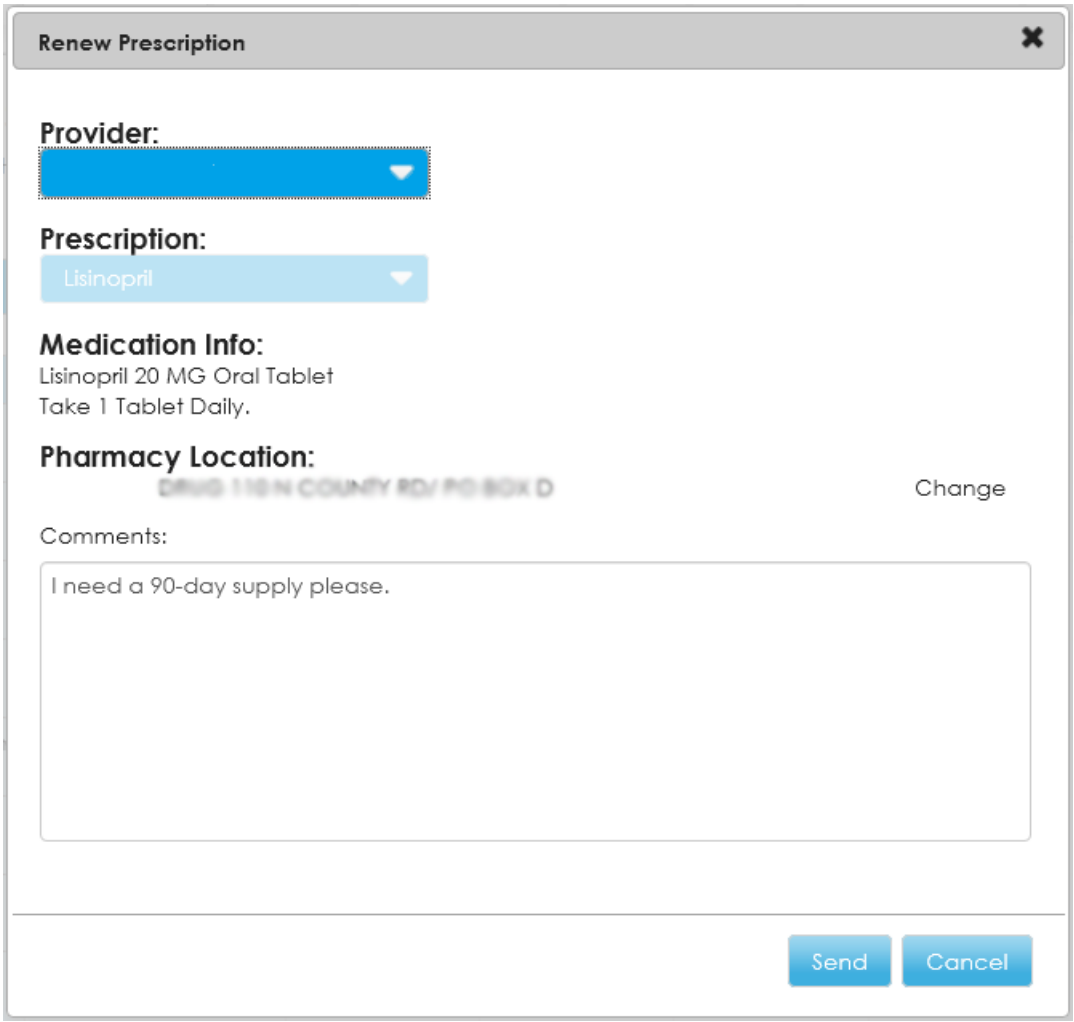

3. Select the provider who prescribed the medication to you from **Provider**.
   You can only request a renewal from a provider who has prescribed this medicine for you in the past. By default, the last provider who wrote the prescription for you is displayed in **Provider**. **Prescription** and **Medication 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**.
   By default, your preferred pharmacy is listed in **Pharmacy Location**.

   > **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.

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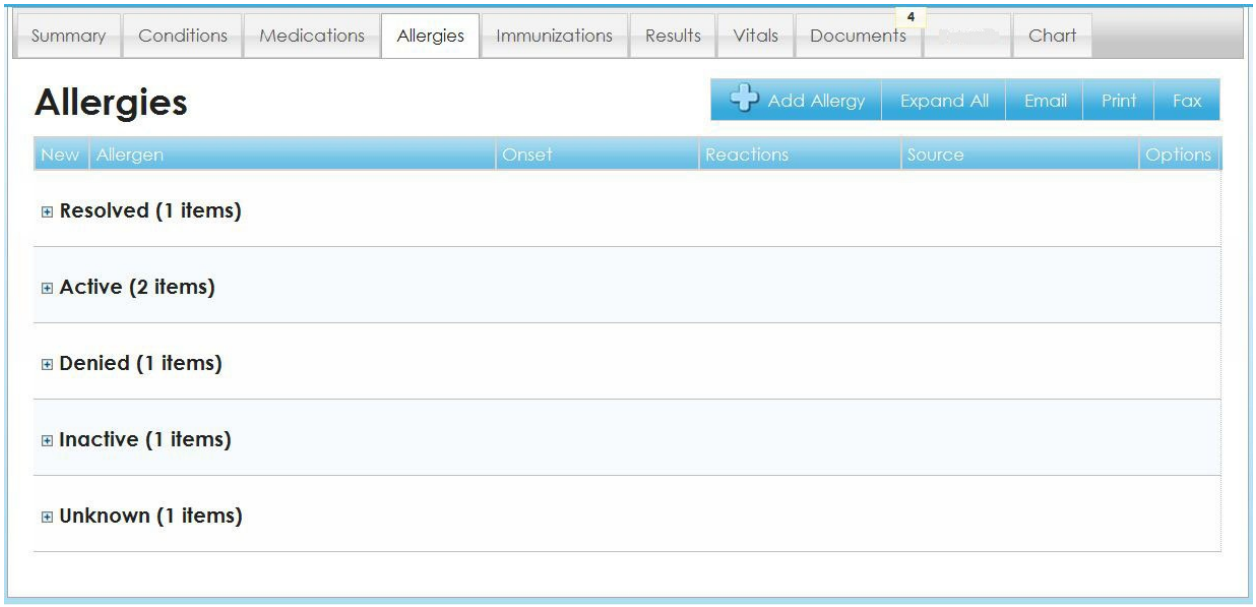
6. Click **Send**.
   Your provider receives an electronic request to refill the prescription.

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

This task has 8 steps.

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.

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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.
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**.

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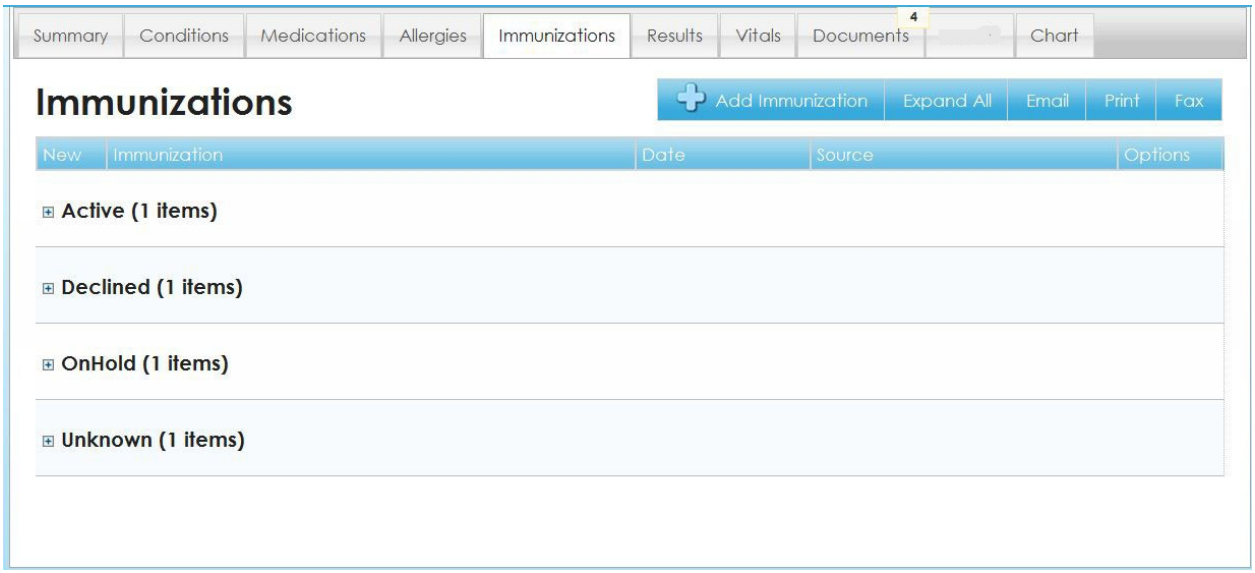
7. For **Comments**, enter related comments.
8. Click **Save**.

Immunizations

FollowMyHealth™ lists all active, resolved, declined, on hold, and unknown immunizations.

From the **Immunizations** tab on **My Health** you can add, delete, and edit immunizations.



Immunizations are categorized by status, including Active, Declined, Unknown, and OnHold. You can expand and collapse the sections. The number of immunizations in each section is displayed in parentheses next to the section title.

Add an immunization

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1. From the **Immunizations** tab on **My Health**, click **Add Immunization**.
   Add Immunization opens.
2. For **Name**, enter the name of the immunization.
   When you enter the name, a list of immunizations is displayed. You can select 1 of these immunizations, or enter your own.
3. For **Administered Date**, enter the date that you received the immunization.
4. (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.
5. For **Status**, select the status that applies to the medication.

Active

Specifies an immunization that you have received.

OnHold

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

Declined

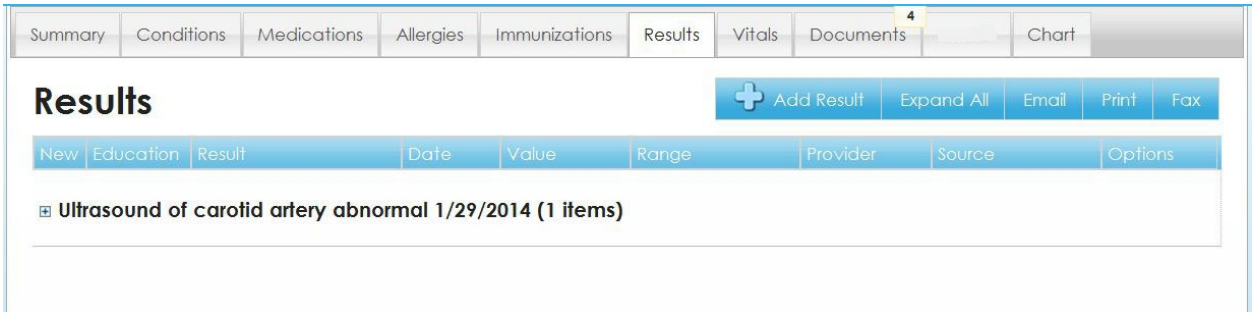
Specifies an immunization that you were offered that you declined.

6. For **Provider**, enter the name of the provider who administered the immunization.
7. For **Comments**, enter related comments.
8. Click **Save**.

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.



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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.

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

Add a result

This task has 8 steps.

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**.

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.

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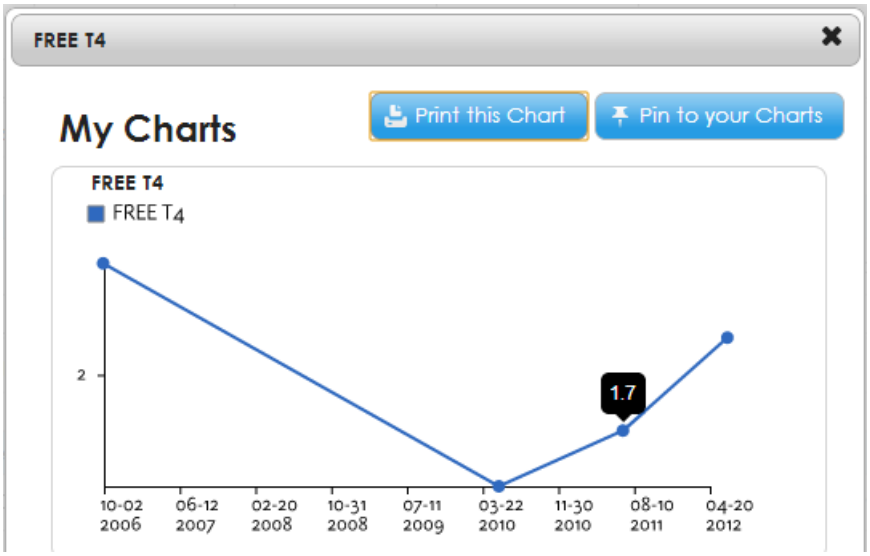

Point to the data points to display the result numbers for that data point.

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.

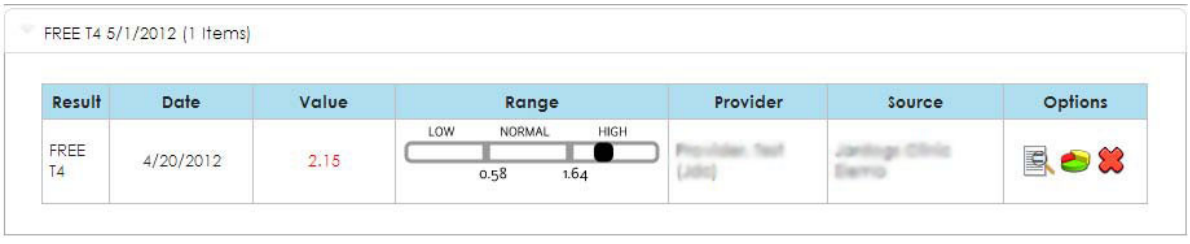

Figure 15: Results with range

   The **Range** column is empty for text-based results that are non-numeric, such as for pathology and radiology.

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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). 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 .
The result detail window opens.

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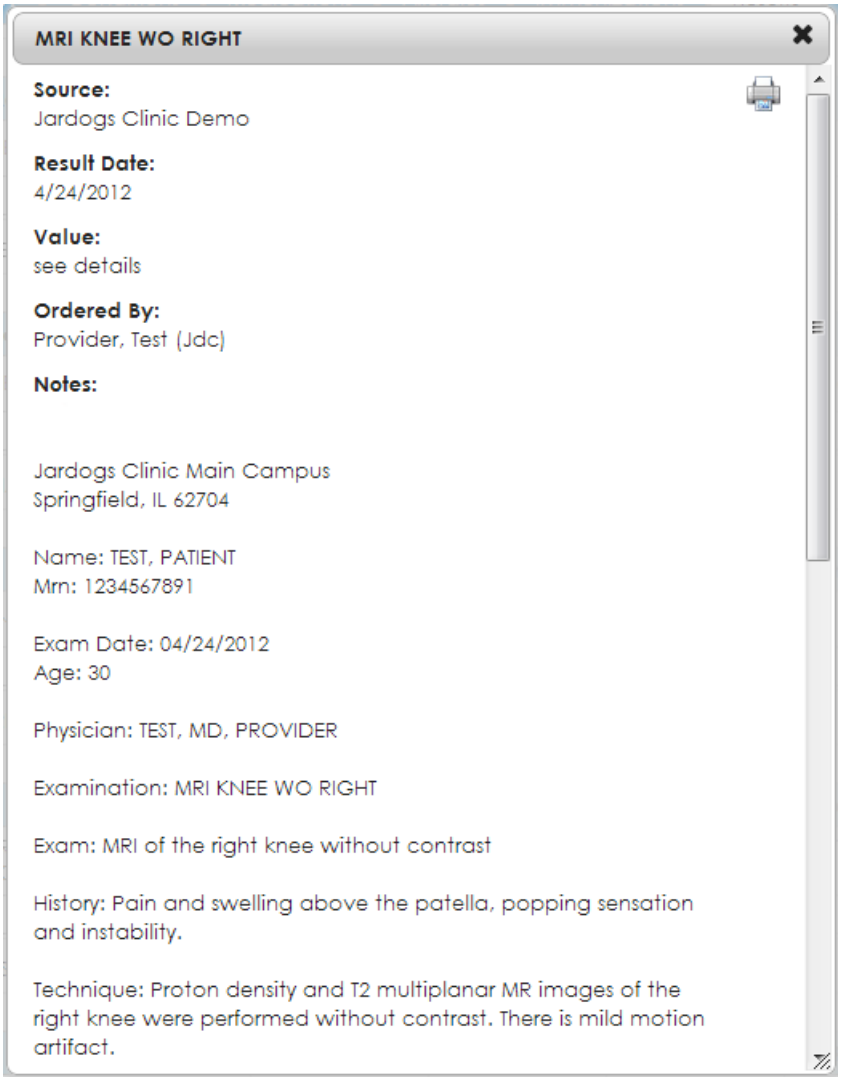

Vitals

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 results.

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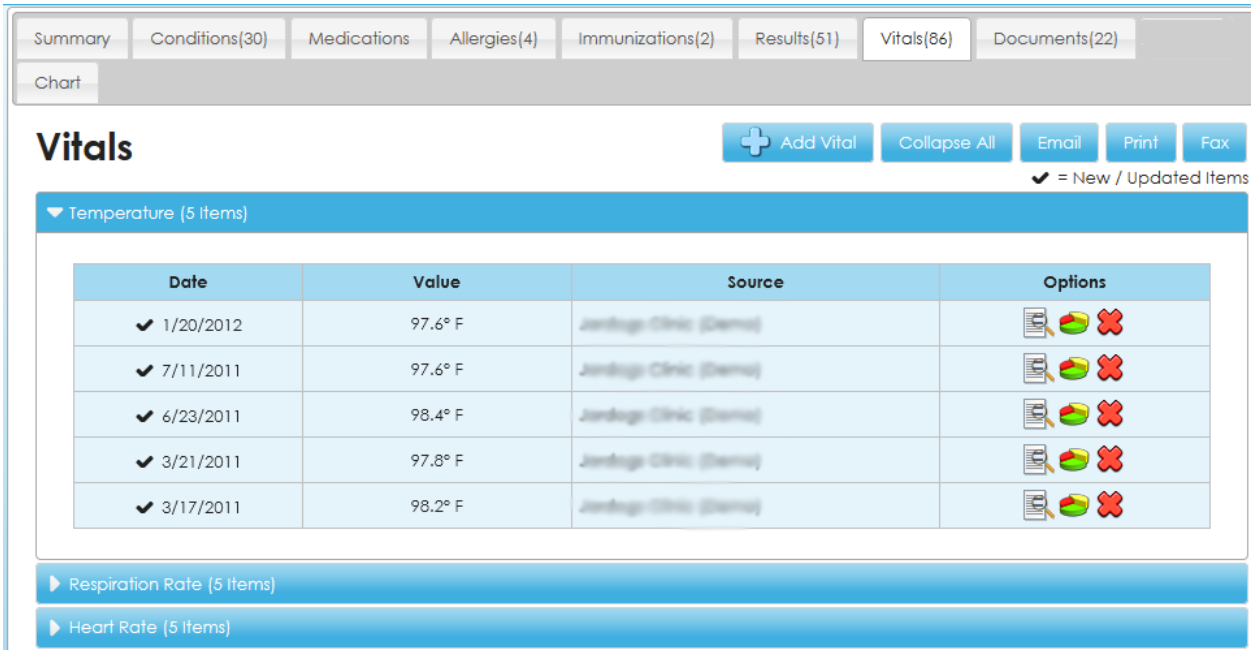

Each vital sign that is added is listed in its own section. You can expand and collapse the sections. The number of vital signs in each section is displayed in parentheses next to the section title. A section that has more than 3 data points or results can be displayed in a graph.

Add a vital sign

This task has 6 steps.

1. From the **Results** tab on **My Health**, click **Add Vital**.
   Add Vital opens.
2. From **Type**, enter the type of the vital.
   When you enter the type, a list of vital types is displayed. You can select 1 of these types.
3. For **Date Taken**, enter the date that the vital is taken.
4. For **Value**, enter the vital reading.
5. For **Comments**, enter related comments.
6. Click **Save**.

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Documents

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

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.

> **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?`.

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.

This task has 7 steps.

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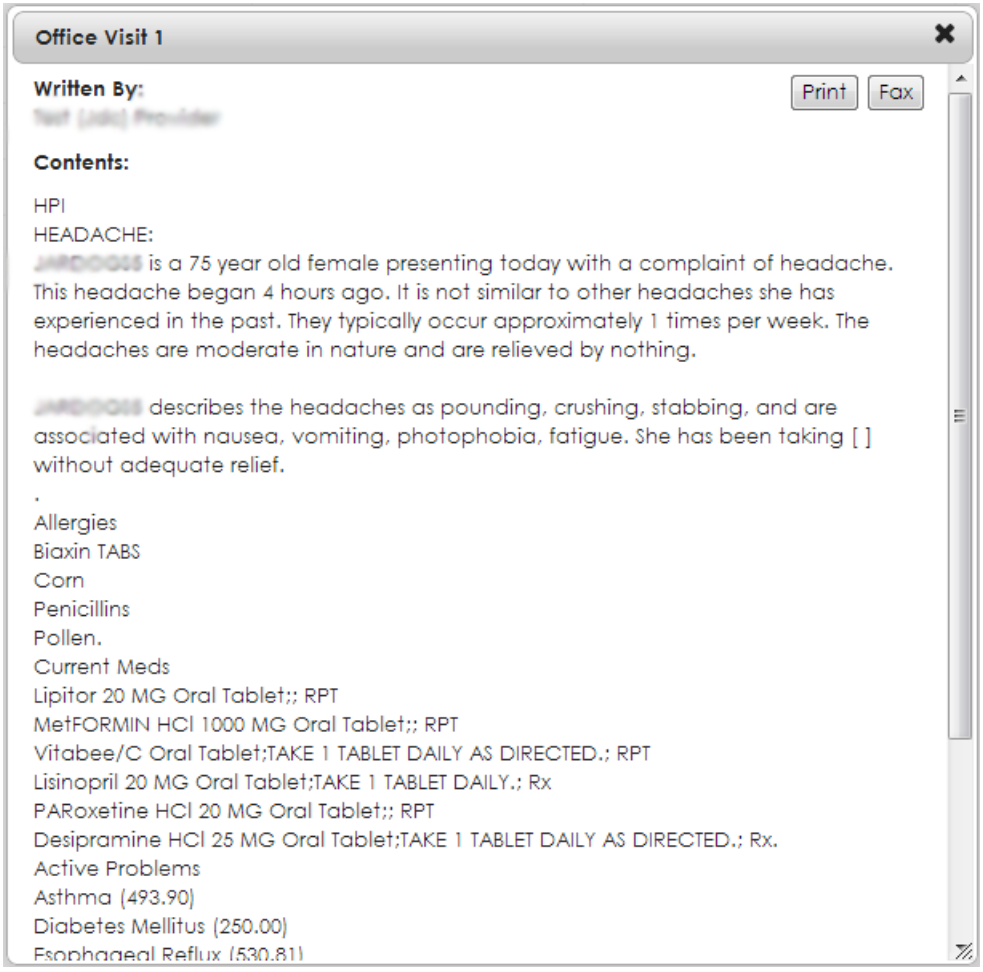
1. From the **Documents** tab on **My Health**, click **Add Document**.
   Add Document opens.
2. For **Name**, enter the name of the document.
3. For **Date**, enter the date that the document was created.
4. For **Provider**, enter the provider that the document is from.
5. Click **Choose File** to 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.



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Results of this task

The document is added to the **Documents** tab.

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 FollowMyHealth™ Patient Access where tools are provided to help you reach your goal.

Wireless blood pressure monitors, blood glucose monitors, and wireless scales can be leveraged to automatically send data related to these goals to 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. Notifications can be sent back to your care provider if you are not following the goal or if any readings violate the rules, enabling you and your care provider to collaborate on reaching your goals.

When your provider creates a goal for you, a notification is sent to your inbox and a new goal indicator is displayed under the **Action Center**.

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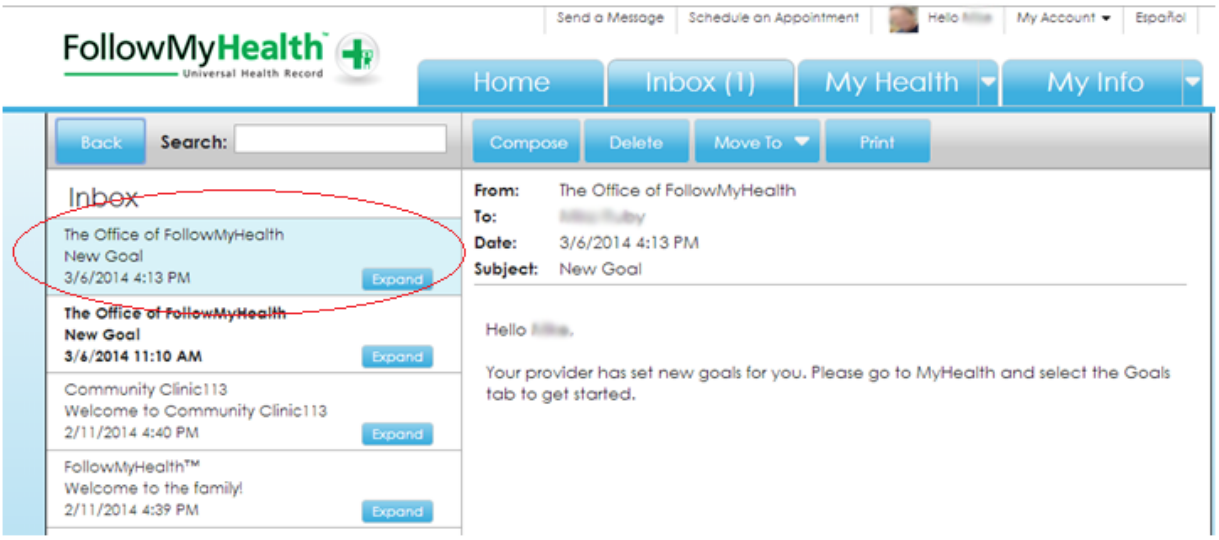

20

Figure 16: New goal notification in Inbox

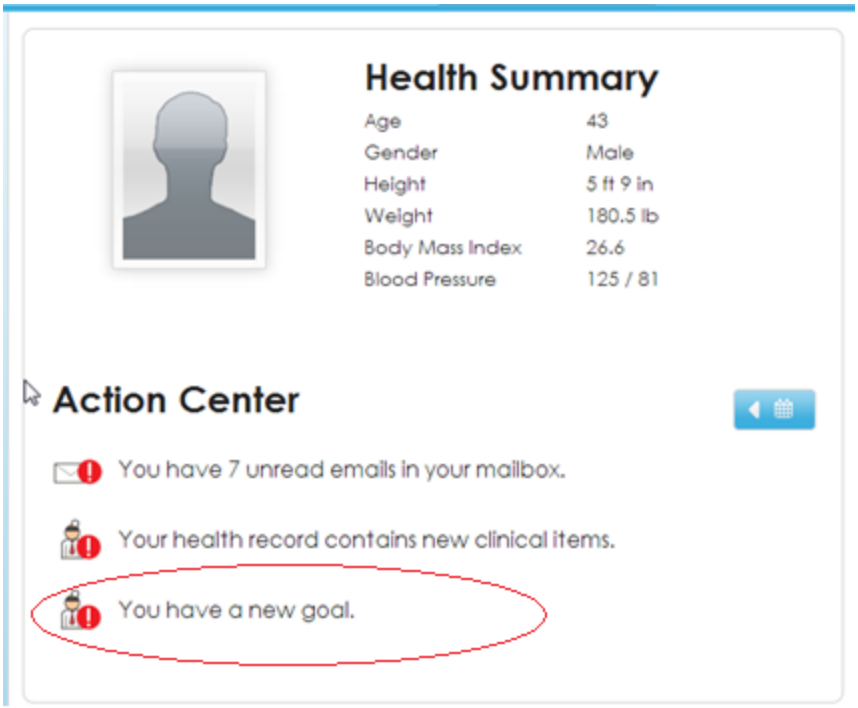

Figure 17: New goal notification under Action Center

Goals are organized by status.

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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 record (EHR) 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 while 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 canceled by your provider, the goal is moved to **Cancelled Goals**. Notifications are no longer triggered and readings are no longer captured for canceled goals.

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 Withings digital scale. The Withings scale automatically sends the reading to FollowMyHealth™ Patient Access.

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- Only weights from your Withings scale 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 tool tip 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 Withings digital scale is set up in **App Center**. For more information, see *Set up a Withings digital scale*.
- You can connect to your Withings digital scale from a weight management goal in the **Goals** tab. Click **Connect to a Withings Scale** from the goal. When the scale is added, **Connect to a Withings Scale** is no longer displayed.
- 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.

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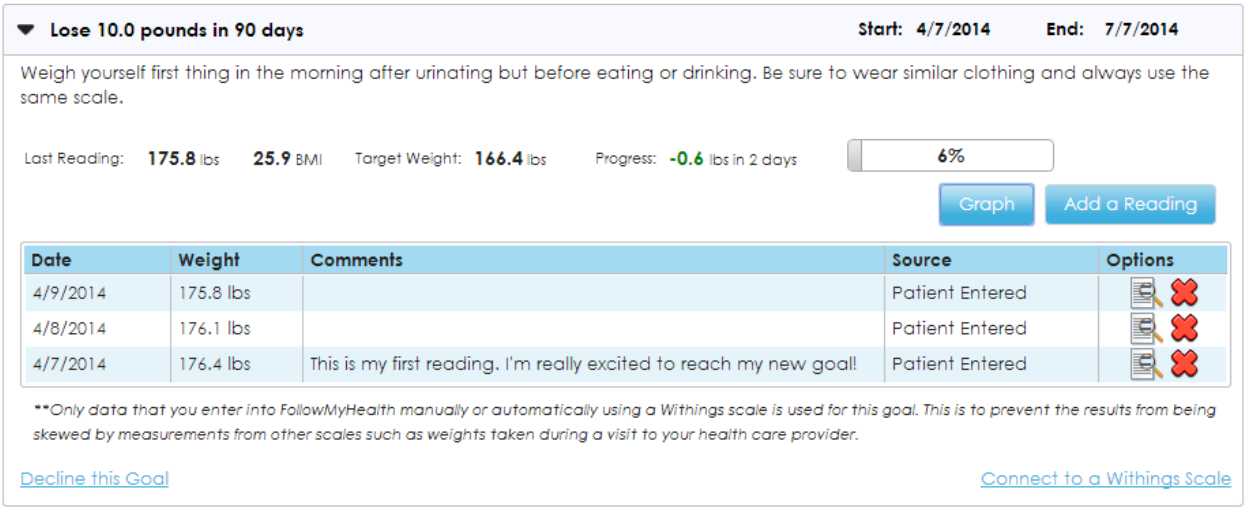

Figure 18: Weight management data in table format

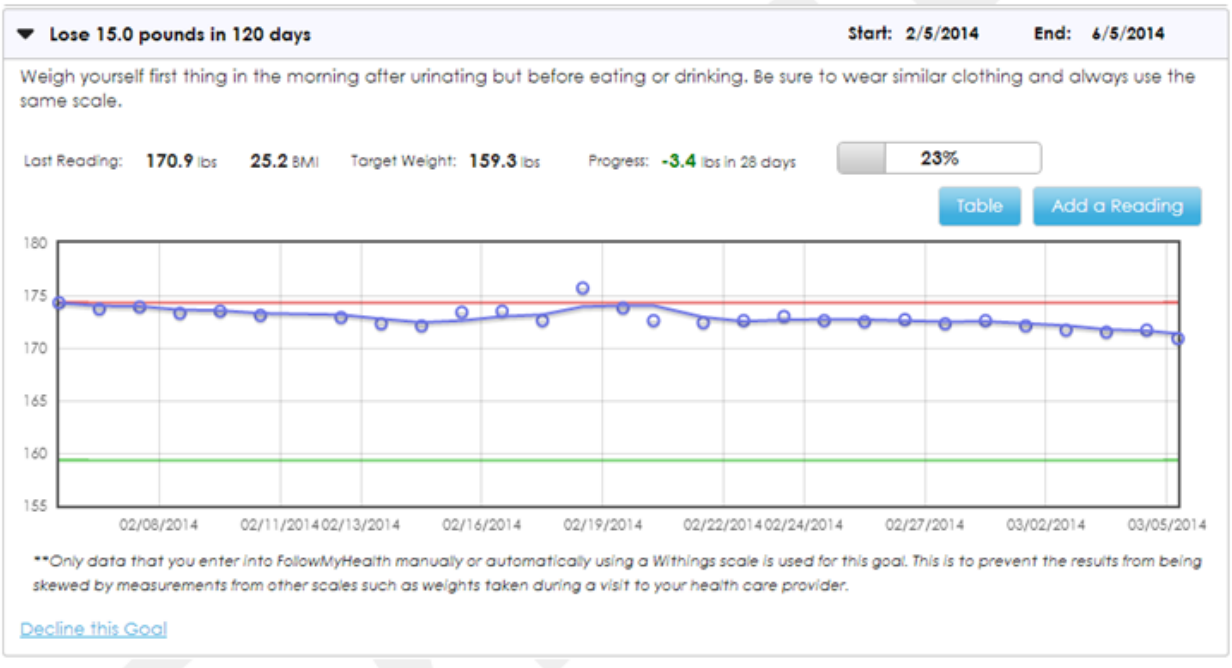

Figure 19: Weight management data in graph format

Monitor blood glucose goal

The monitor blood glucose goal is used to monitor blood glucose levels for patients with diabetes.

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The following list includes best practices when managing your monitor blood glucose goals.

- Readings are entered manually from the goal or electronically with a Telcare Blood Glucose Meter. The Telcare Blood Glucose Meter automatically sends the reading to FollowMyHealth™ Patient Access.
- The graph data point tool tip includes the reading, date, time, tag, patient-entered comments, and any broken rules.
- Telcare Blood Glucose Meter is set up through **App Center**. For more information, see *Set up a Telcare Blood Glucose Meter*.
- You can connect to your Telcare Blood Glucose Meter from a goal in the **Goals** tab. You can also click **Connect to a Telcare Blood Glucose Meter** from the goal. When the monitor is added, **Connect to a Telcare Blood Glucose Meter** is no longer displayed.
- 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.

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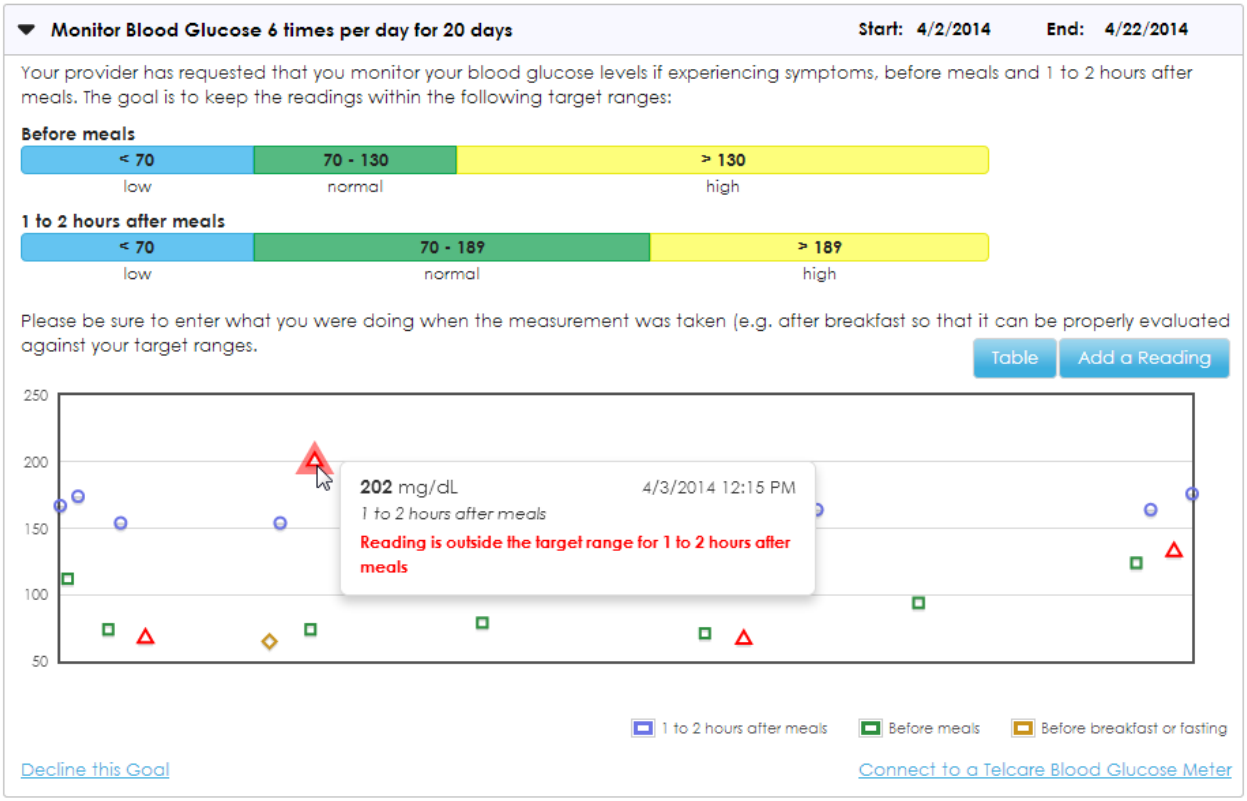

Figure 20: Monitor blood glucose data in graph format

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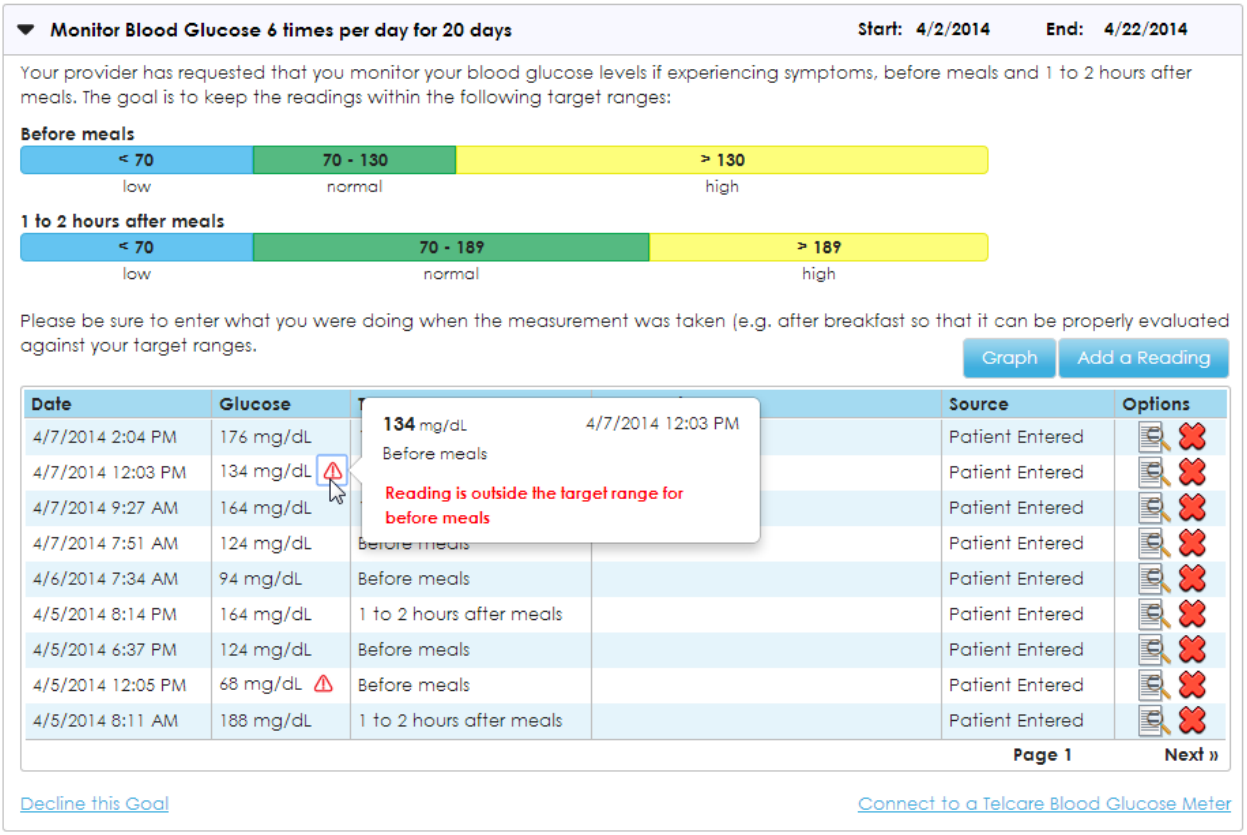

Figure 21: Monitor blood glucose data in table format

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 Withings Blood Pressure Monitor. The Withings monitor automatically sends the reading to FollowMyHealth™ Patient Access.
- The graph data point tool tip includes the value, date, time, patient-entered comments, and any broken rules.
- Withings Blood Pressure Monitor is set up through **App Center**. For more information, see *Set up a Withings blood pressure monitor*.

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- You can connect to your Withings monitor from a blood pressure goal in the **Goals** tab. Click **Connect to a Withings Blood Pressure Monitor** from the goal. When the scale is added, **Connect to a Withings Blood Pressure Monitor** is no longer displayed.
- 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.

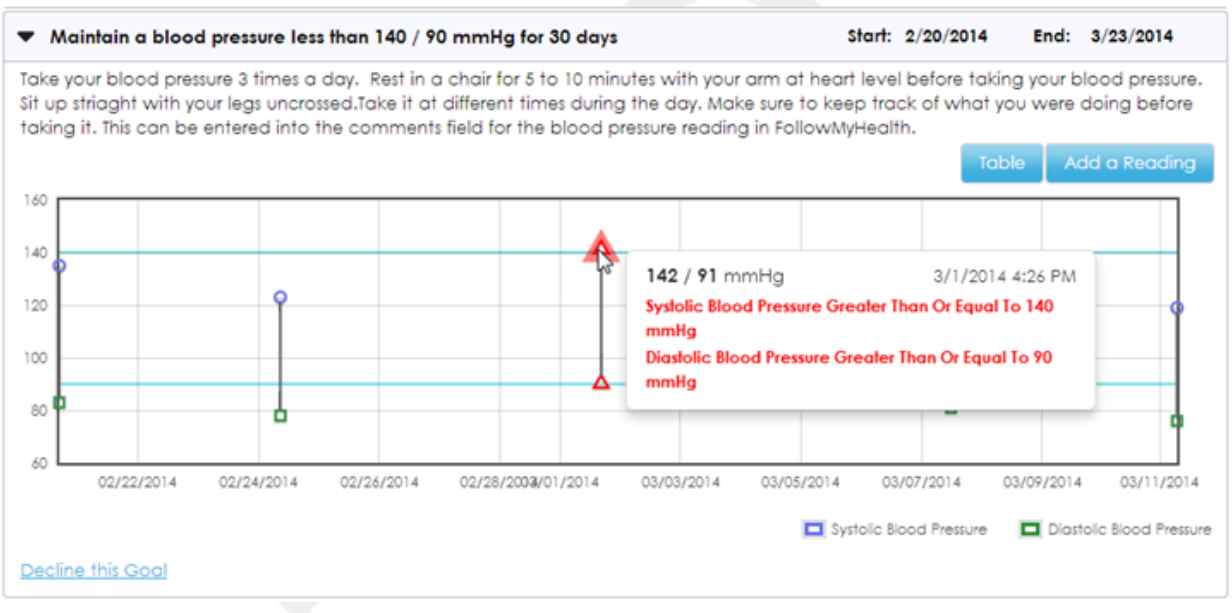

Figure 22: Monitor blood pressure data in graph format

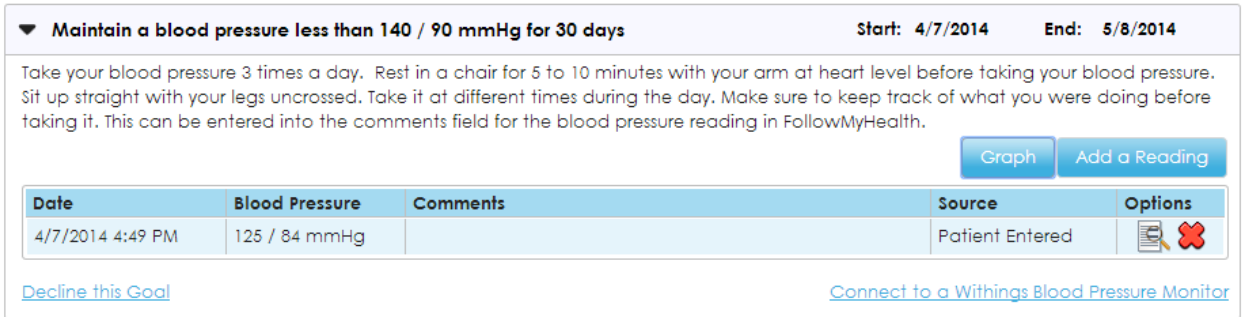

Figure 23: Monitor blood pressure data in table format

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.

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- Readings are entered manually or with a Withings digital scale. The Withings scale automatically sends the reading to FollowMyHealth™ Patient Access.
- Only weights from your Withings scale 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 tool tip includes the reading, body mass index (BMI), patient-entered comments, and any broken rules.
- The Withings digital scale is set up through **App Center**. For more information, see *Set up a Withings digital scale*.
- You can connect to your Withings digital scale from a monitor weight goal on the **Goals** tab. Click **Connect to a Withings Scale** from the goal. When the scale is added, **Connect to a Withings Scale** is no longer displayed.
- 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.

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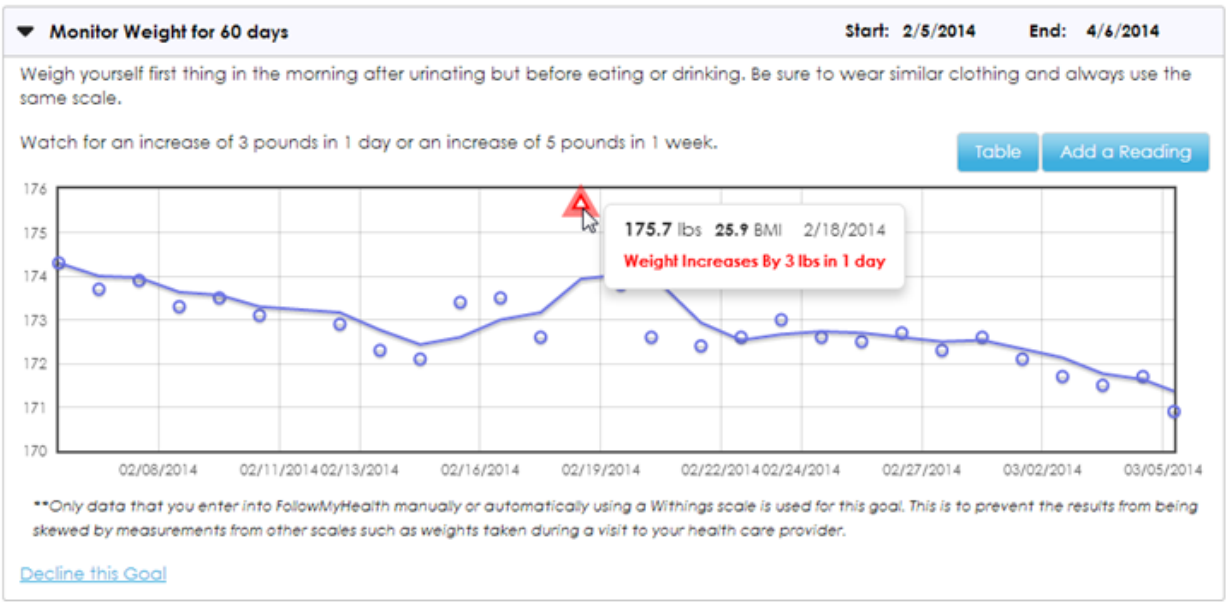

Figure 24: Monitor weight data in graph format

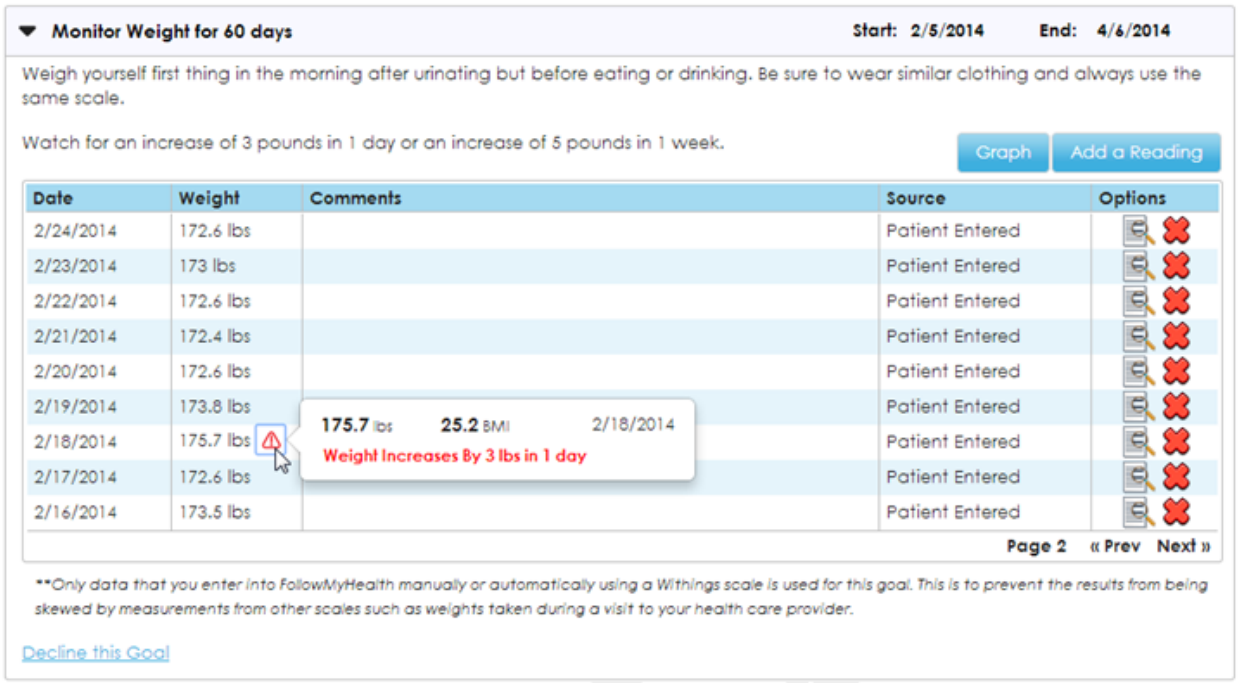

Figure 25: Monitor weight data in table format

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View goals and readings

Before you begin

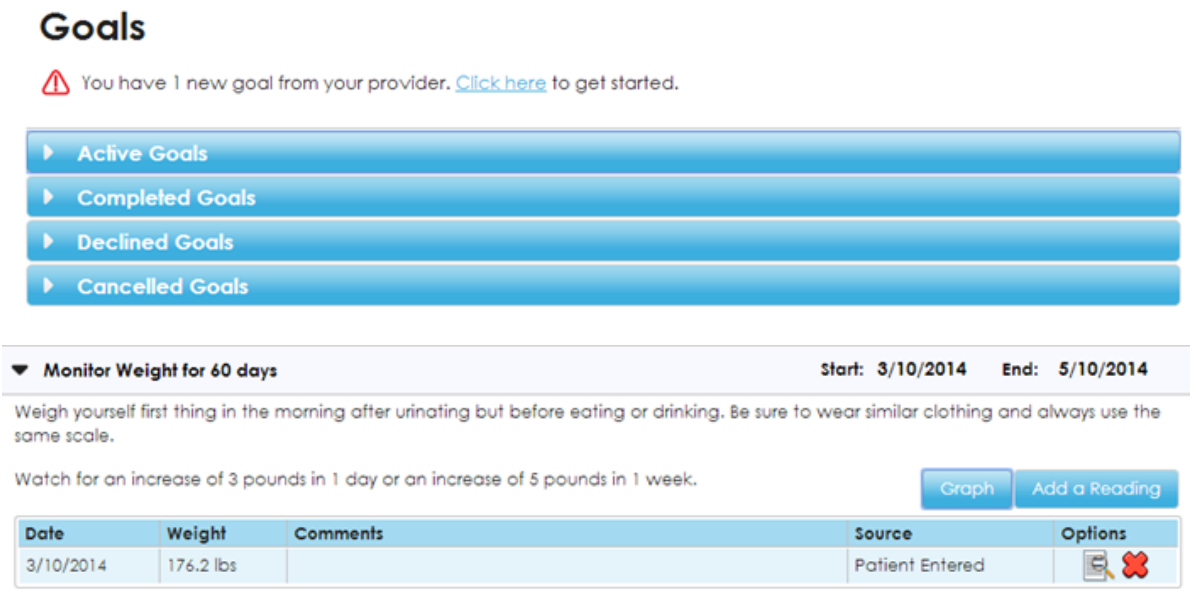
You must accept a new goal to add the goal to the **Goals** tab.

You must have at least 1 goal for the **Goals** tab to display.

> 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.



> To change the goal display, click **Graph** or **Table**.
You can toggle 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 personal health record (PHR) and no longer is displayed on the goal.

> To restore a reading, go to **My Account > Preferences > Restore Deleted Items**.

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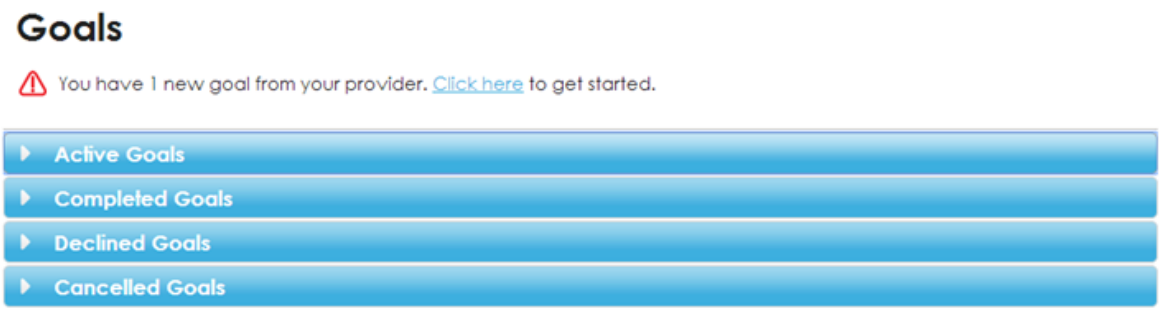
Accept a new goal

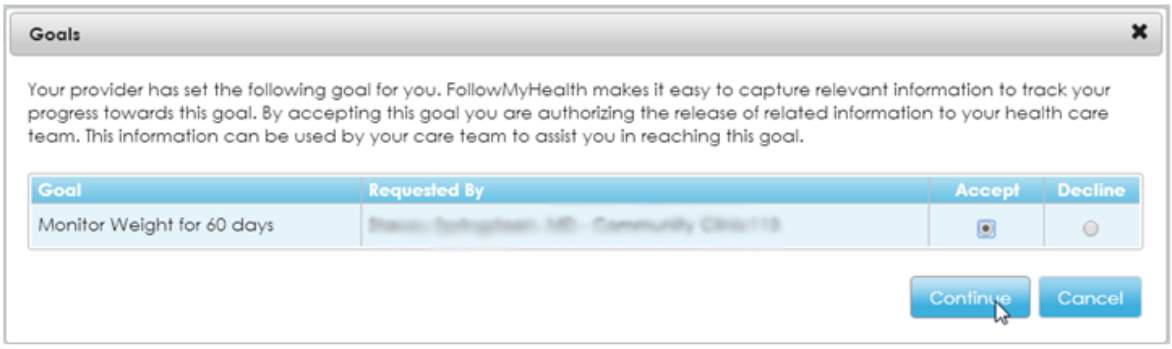
You must accept a new goal to get started. By accepting the goal, you are consenting to share information related to the goal with the ordering provider and care team.

1. Click **My Health > Goals**.
   Alternatively, you can 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 **Accept** for the goals that you want to accept.
4. Click **Continue**.
   A **Goal Release of Information Authorization** form is created when you accept or decline the goal. The release form provides a record of your consent and is available on the **Documents** tab.

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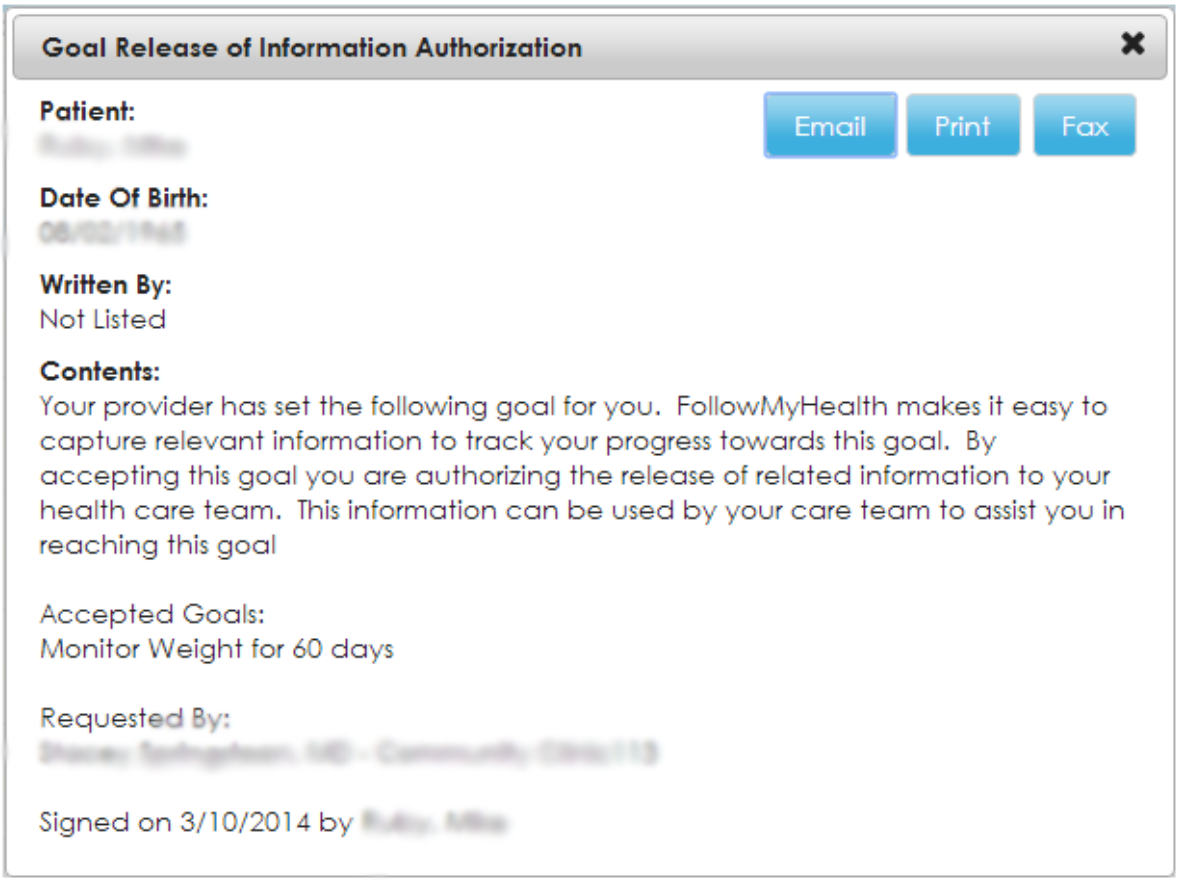

Results of this task

When you accept the goal, the goal is listed under **Active** on the **Goals** tab.

What to do next

Connect to your wireless device, such as a Withings scale, blood pressure monitor, or Telcare blood glucose meter, or manually enter additional readings, as needed, if you do not have a wireless device.

Decline a new goal

You can decline a goal when it is new or active.

1. Click **My Health > Goals**.
   Alternatively, you can click the new goal notification on **Action Center** to access the **Goals** tab.

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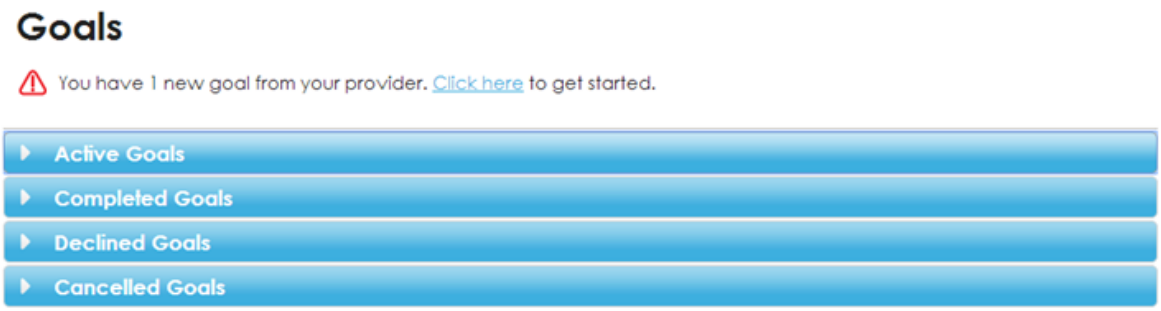
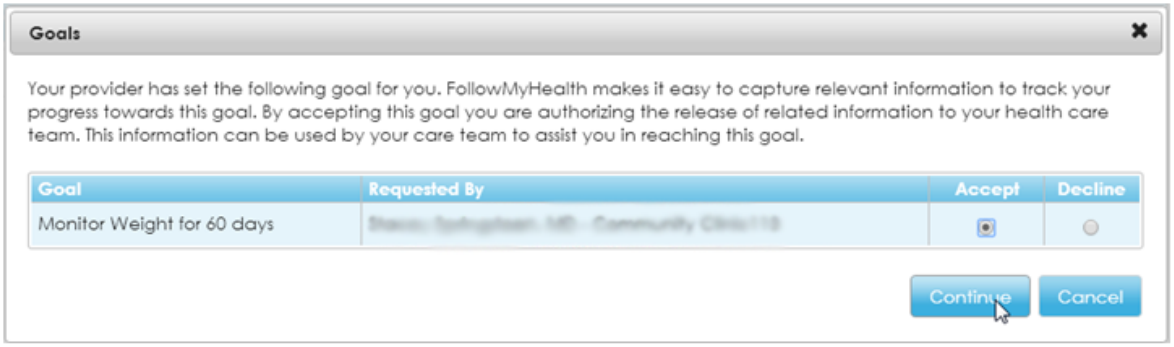
The **Goals** tab is displayed.



2. Click **Click here** to view the new goal.
Goals opens.



3. Select **Decline** for the goals you want to decline.
4. Click **Continue**.
A **Goal Release of Information Authorization** form is created when you decline the goal. The release form provides a record of your consent and is available on the **Documents** tab.

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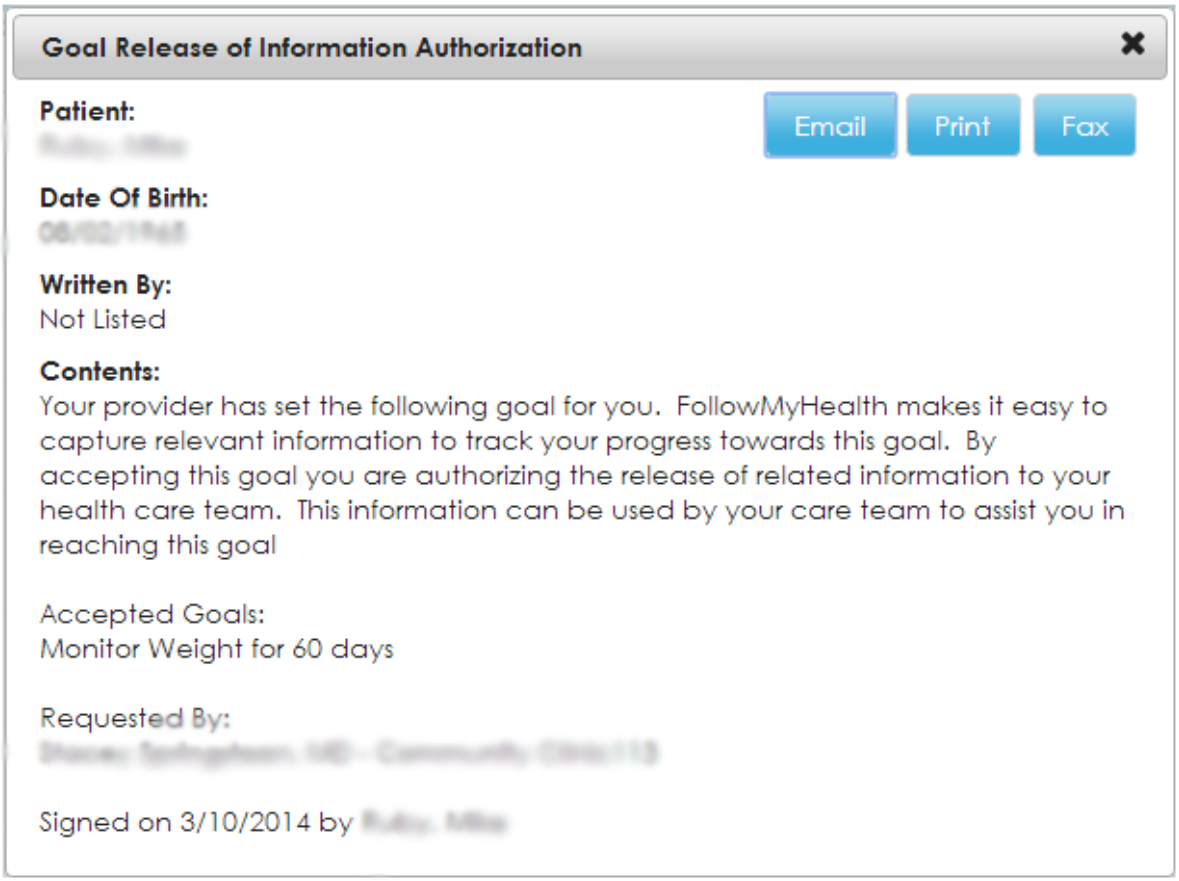

Results of this task

When you decline the goal, the goal is listed under **Declined Goals** on the **Goals** tab with the date that the goal was declined.

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.

Add a reading

Before you begin

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.

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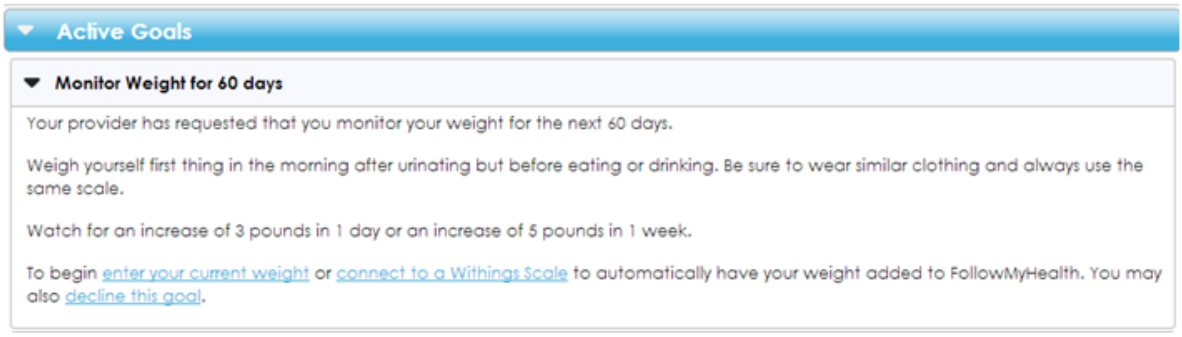
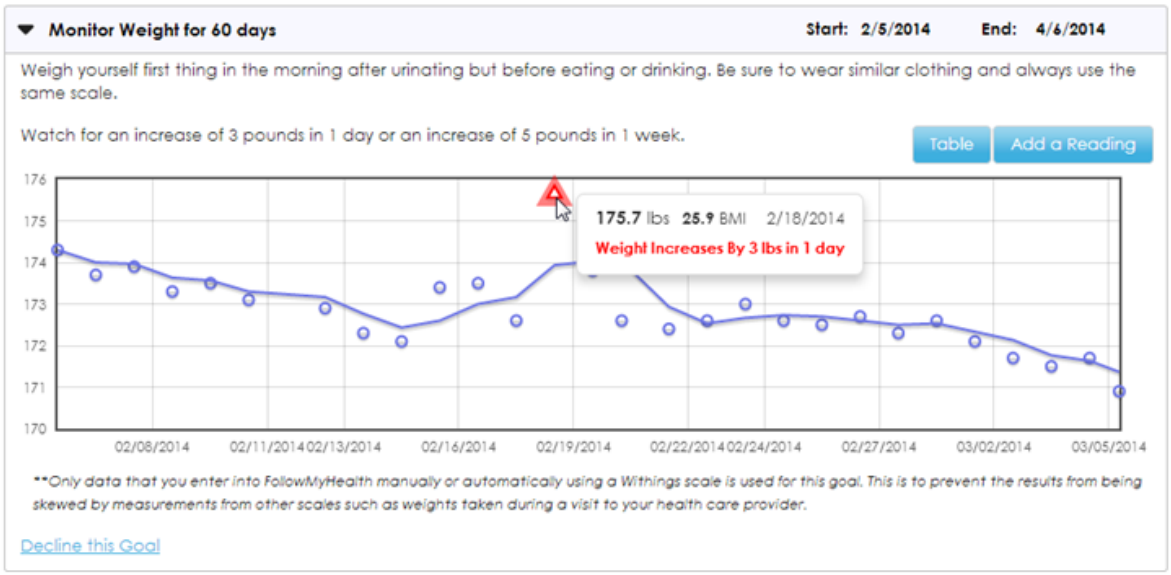
1. For the first reading, click **enter your current *reading*** or connect to a wireless device to have readings automatically sent to the portal.



For example, if you are entering a weight, click **enter your current weight** or use the Withings scale 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.



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.

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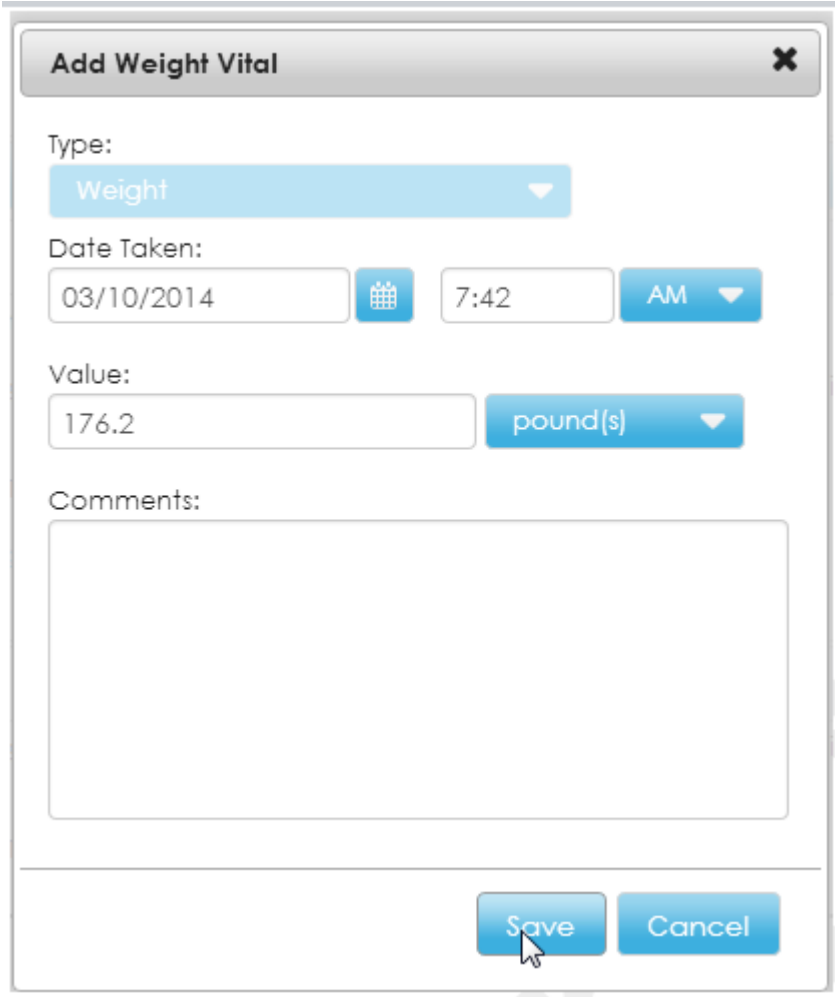
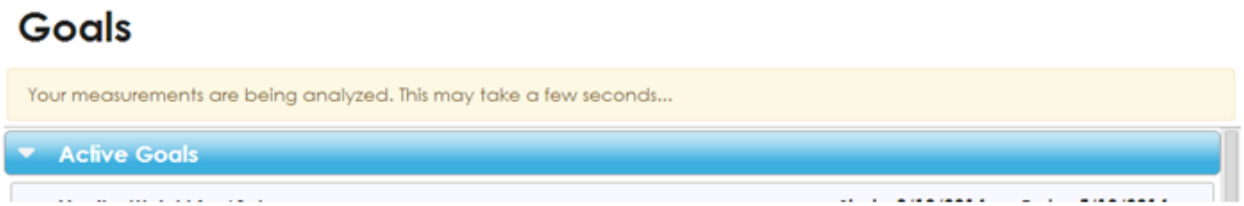


2. Click **Save**.

Results of this task

The reading is saved in FollowMyHealth™ and analyzed. A message is displayed while 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.

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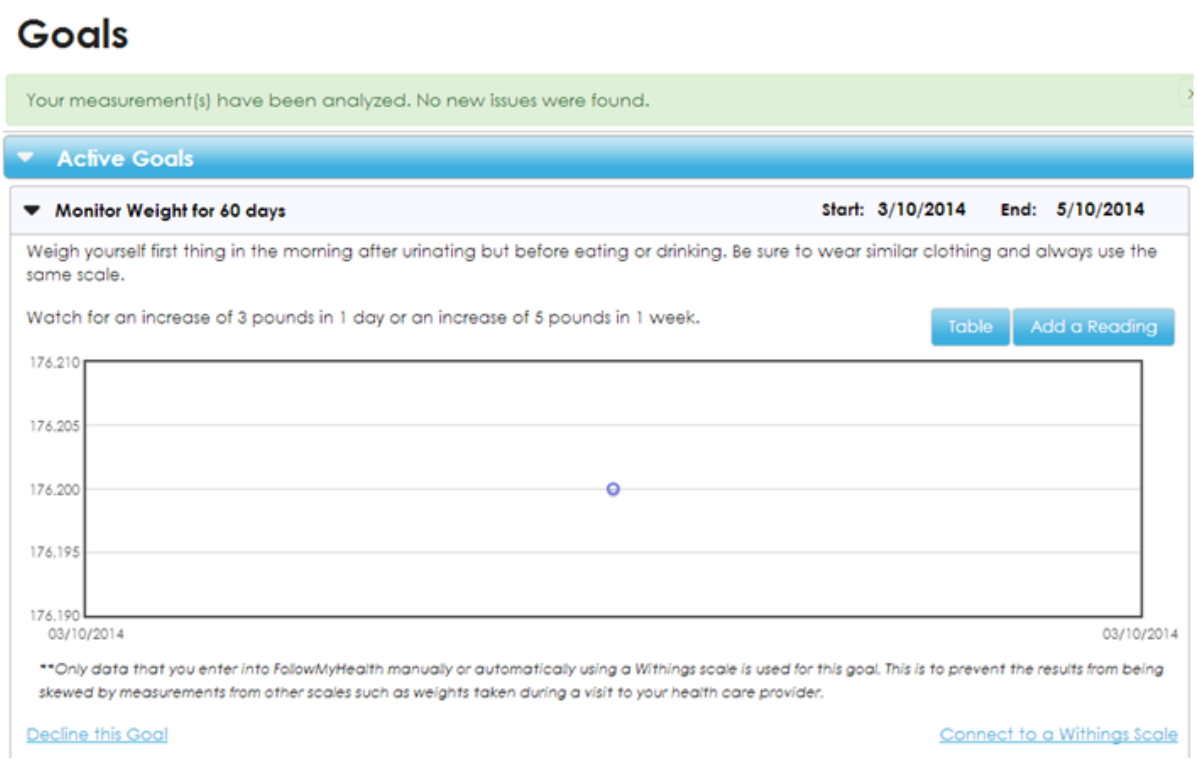

The goal is updated and a graph is displayed.

> **Note:** Only readings that fall within the start and end date are included on the goal.

Additional information about each reading is available in a tool tip when you point to each data point.

If a rule is broken, the goal information is displayed with a message that the entered reading broke a rule.

The broken rule is also flagged on the graph and table view.

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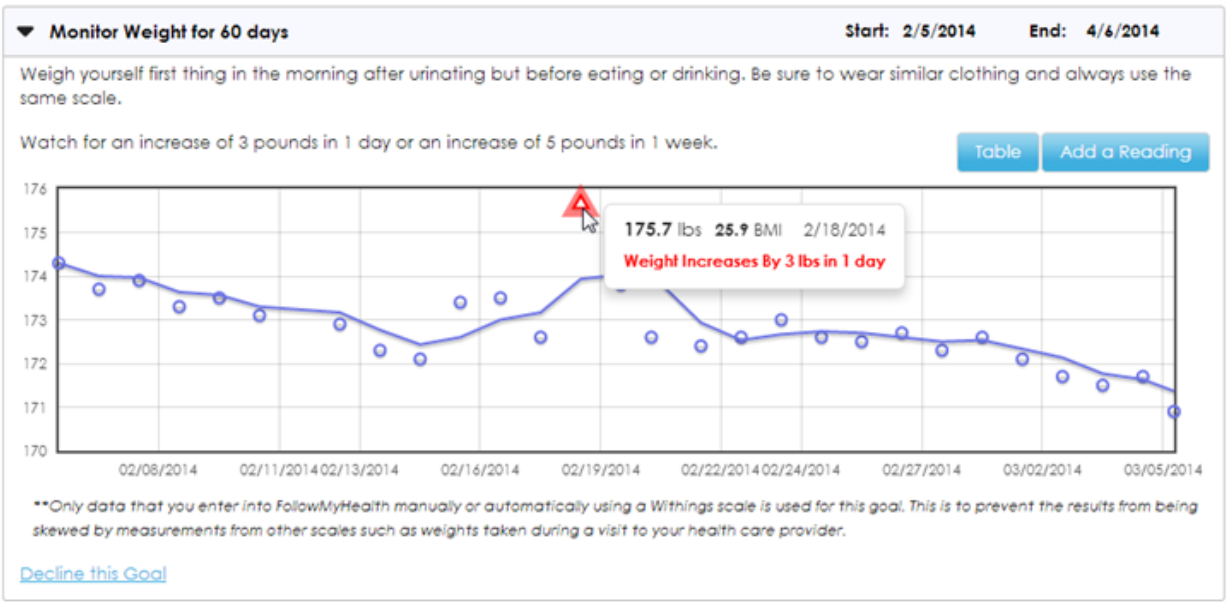

Figure 26: Goal violation on graph view

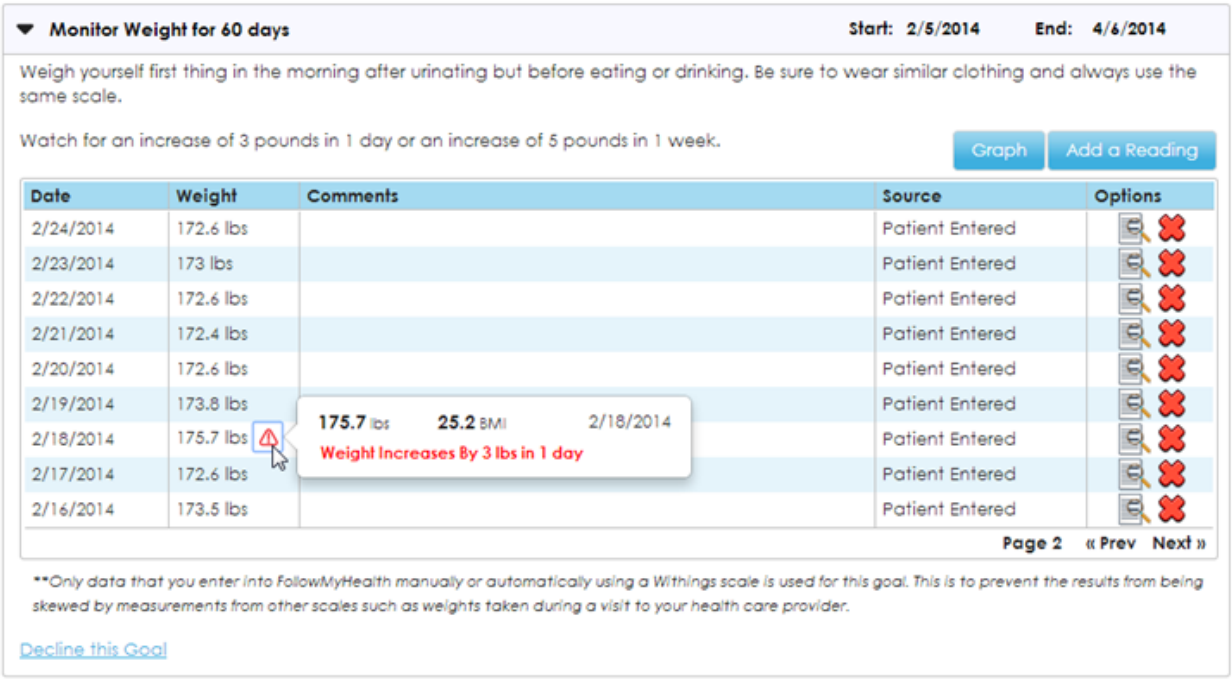

Figure 27: Goal violation on table view

What to do next

Enter additional manual readings or connect to a wireless device for measurements to continue

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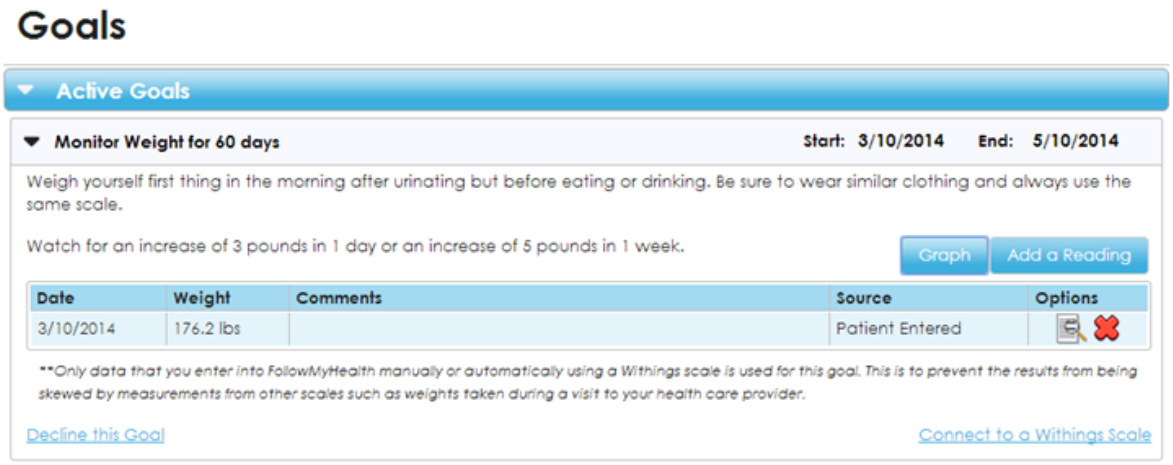
capturing readings and working to accomplish your goal.

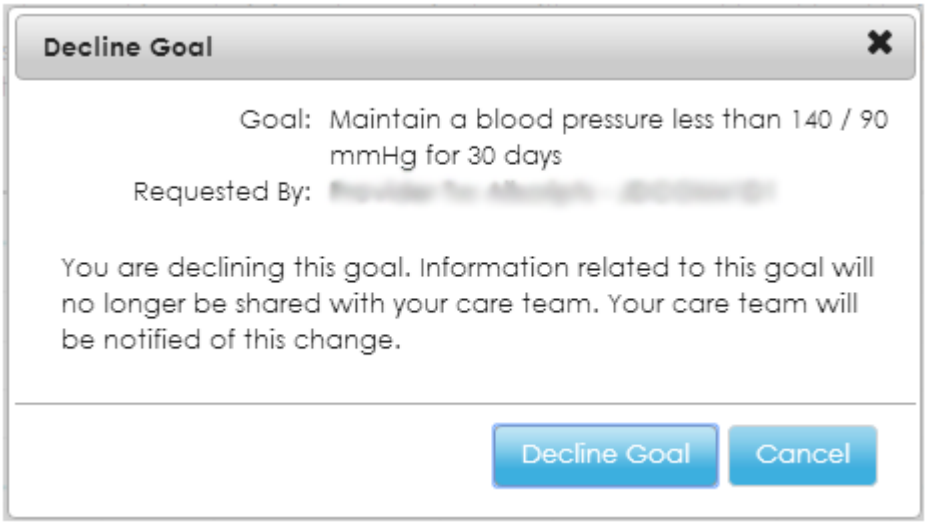
Decline an active goal

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.



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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.

Notifications

If you decline a goal, are non-compliant, or a goal rule is broken, a notification is sent to the provider who set the goal.

The following notification types are possible.

Declined notification

If you decline a goal, the provider receives a notification indicating that the goal was declined. A new or active goal can be declined.

You can view the declined goal at **Goals > Declined Goals**.

A declined notification is also sent to the ordering provider if you delete your FollowMyHealth™ account. All information previously collected and related to the goal are permanently removed from your FollowMyHealth™ account.

Non-compliant or broken rule notification

If a goal rule is violated, the notification includes a summary of the rules that were broken, a summary of the goal, and the notification history for the goal. This information helps your provider identify any potential issues and gives them an opportunity to assist you in reaching the goal.

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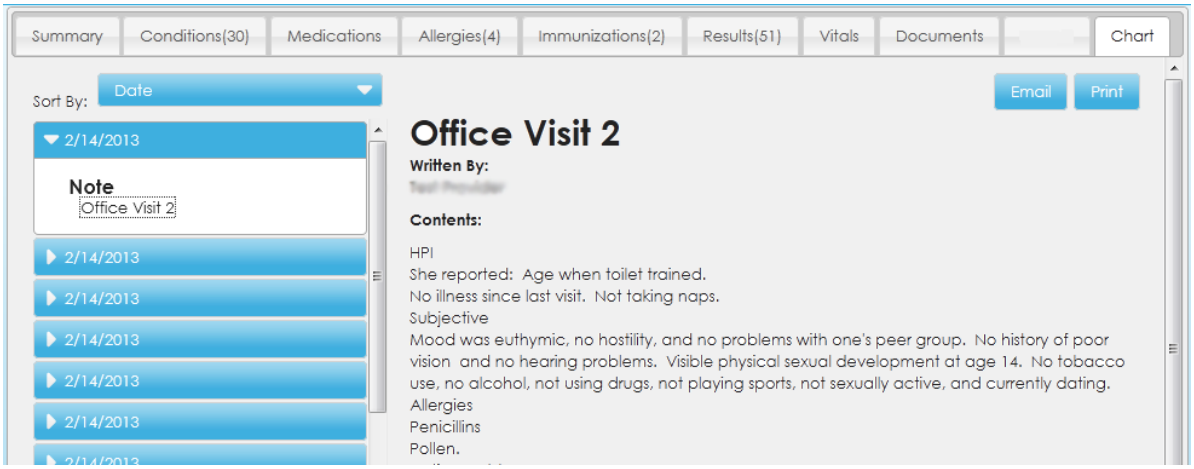
Chart

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 electronic health record (EHR) or by provider, such as the provider who is associated to each item in the EHR.

1. From **My Health**, click the **Chart** tab.



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.

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Chapter 7

My Info

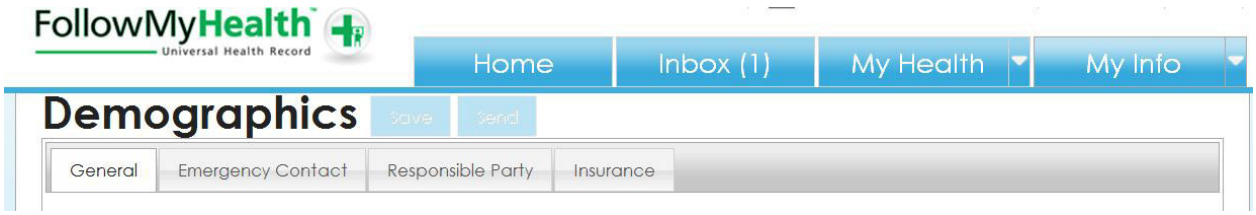
The **My Info** tab contains your demographic and provider information.

From the **Demographics** tab, you can manage your basic information, insurance, emergency contacts, and the person who is responsible for your account. From the **Providers** tab, manage information about your preferred and other providers who you use for healthcare.

Figure 28: My Info tab

Demographics

Demographics includes 4 tabs, **General**, **Emergency Contact**, **Responsible Party**, and **Insurance**.



Edit general demographics

The **General** tab includes **Basic Information**, **Social Information**, and **Preferred Pharmacy**.

This task has 5 steps.

1. From **My Info** select **Demographics**.
   Demographics opens.
2. From **Basic Information**, update basic information or add information that is not automatically filled.

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Some of the information in **Basic Information** might be filled in based on the information that your healthcare organization already has recorded for you.

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.

   > **Note:** You can make multiple race and ethnicity selections. To make multiple selections, make an initial selection and then select subsequent selections while holding down the **Ctrl** key.

4. Click **Save**.
   Save Successful opens.
5. Click **OK**.

Edit your preferred pharmacy

You can also edit your preferred pharmacy from **My Health > Medications**.

This task has 5 steps.

1. From **My Info**, select **Demographics**.
   Demographics opens.
2. From the **General** tab, click **Edit** under **Preferred Pharmacy**.
3. For **Search**, enter the ZIP Code area that you want to search.
   By default, your ZIP Code is displayed 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.
   FollowMyHealth™ 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.

This task has 5 steps.

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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 in 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***.

This task has 5 steps.

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 in 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.

This task has 5 steps.

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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 in, based on the information your healthcare organization already has recorded about you.
4. Click **Save**.
   Save Successful opens.
5. Click **OK**.

Providers

Providers includes 2 tabs, **My Providers** and **Additional Providers**.

To access **Providers**, click **My Info > Providers**.

The **My Providers** tab displays the providers that are associated with your healthcare record. The **Additional Providers** tab displays providers that you do not have a relationship with, but they are accepting new patient requests. If you are connected to more than 1 healthcare organization, you can view the providers from each organization by selecting the organization from the organization search in the upper right. By default, the **Additional Providers** tab displays providers from all organizations.

Each provider can enable the type of online communication that he or she wants to enable, including scheduling an appointment, renewing a prescription, requesting a consultation, requesting a referral, sending a message, and sending a profile to a friend. The tasks that you can complete are displayed under **What do you want to do**, depending on the services that the provider enables. The only option available from the **Additional Providers** tab is to schedule an appointment.

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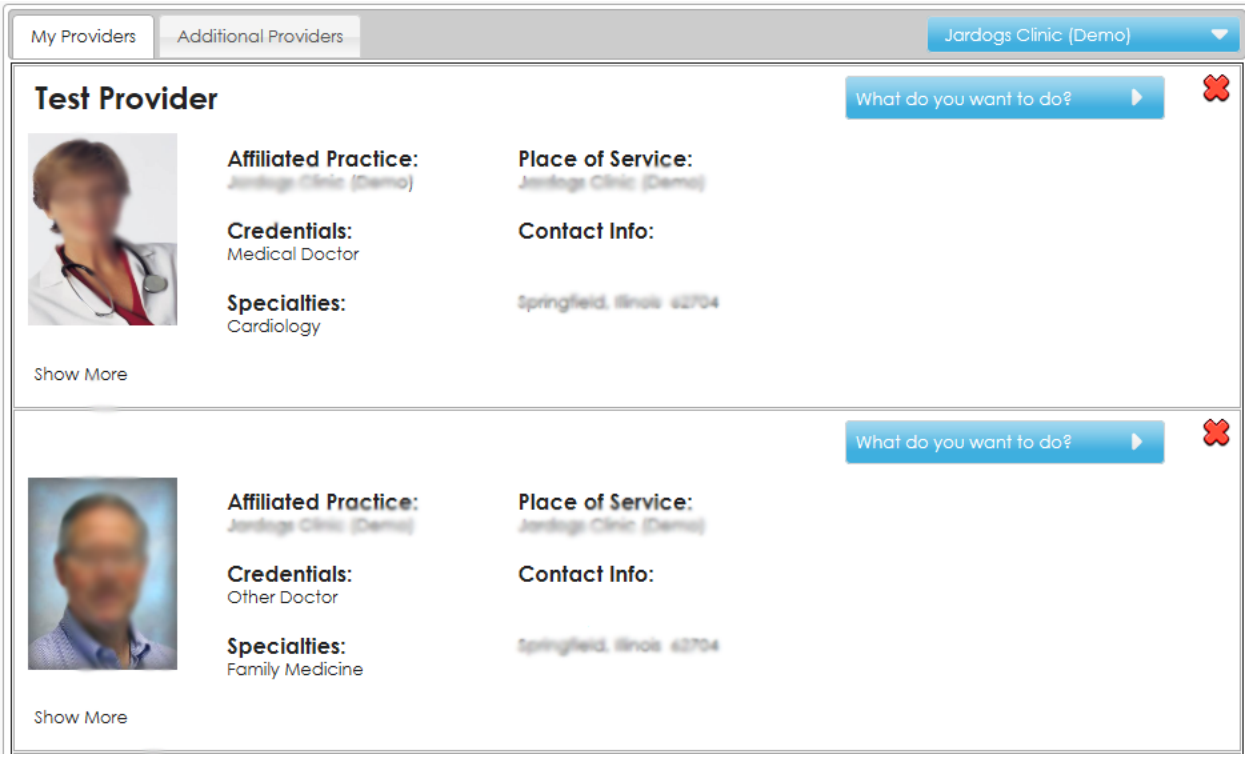

Figure 29: My Providers

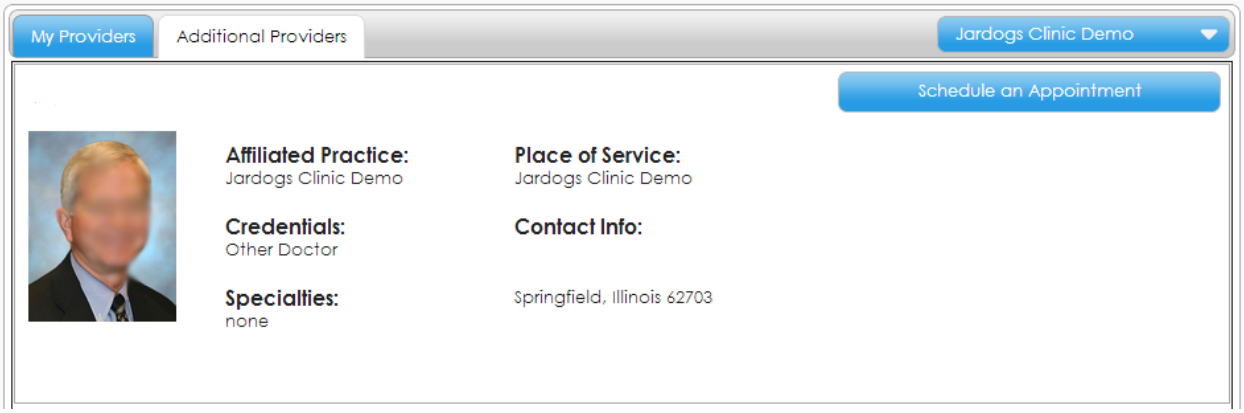

Figure 30: Additional Providers

Send a provider profile

You can share a provider profile with family and friends from the **My Provider** tab.

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1. From **My Info**, select **Providers**.
   Providers opens.
2. From **What do you want to do**, select **Send Profile to a Friend**.
   Share Provider Profile opens.
3. Enter the email address of the person that you want to send the profile to, a subject, and message.
4. Click **Send**.

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