

ETSU Physicians FollowMyHealth



QUILLEN ETSU PHYSICIANS
EAST TENNESSEE STATE UNIVERSITY

Electronic Health Records
Information and Access

FollowMyHealth™ Patient Portal

Quillen ETSU Physicians is excited to offer our patients an online tool that provides anywhere, anytime access to your personal health records.

With the FollowMyHealth patient portal, you can manage your health, communicate with your providers, and make more informed decisions about your care – 24/7 from any computer, smartphone, or tablet.

[LOG IN](#)



How will I know if a patient is enrolled in the patient portal?

Patient Signed Up

[R] TEST, MONACO PCP Stone, Ka
MRN 0010006
03-Mar-1979 (40y) F |     FYI

Patient Sent an Invite

[R] TEST, JUANITA PCP GROSSER
MRN 001002000
11-Mar-2014 (5y) F |    FYI

Patient has not Signed Up

SUPERUSER, GAMBIT PCP ALLSC
MRN 001000
01-Jan-1979 (40y) M |    FYI

Patient Refused Portal

[R] TEST, BOBBY PCP ALMAT
MRN 001000
03-Mar-2013 (6y) F |     FYI

What will the patients see in the patient portal?

- Conditions
- Medications
 - Allergies
- Immunizations
 - Lab Results
 - Vitals
- Clinical Summaries

Patients will not see

- Notes
- Scanned Documents
 - Scanned Results
- Any medical records prior to 5/1/2014

The screenshot displays a patient portal interface with the following sections:

- Health Summary:** Includes a profile picture of a man and woman, and a table of vital statistics:

Age	35
Gender	Female
Height	5 ft 3 in
Weight	182 lb
Body Mass Index	32.2
Blood Pressure	120 / 87
Smoking Status	Current every day smoker
Primary Insurance	BLUE SHIELD OF TN
- Action Center:** Features a "Monaco Test" section and a list of notifications:
 - You have 2 unread emails in your mailbox.
 - Your health record contains new clinical items.
 - Reminder for Csmc Check due by 5/1/2015.
 - Reminder for Hemoglobin A1c due by 12/11/2014.
- Appointments:** Includes a search bar, "Request" and "Export" buttons, and tabs for "Upcoming", "Past", and "Other". A message states: "You have no upcoming appointments."
- Recent Activity:** Shows a list of recent events with "Previous" and "Next" navigation buttons. The activity includes:
 - Quillen ETSU Physicians added 1 health conditions to your health record. (1 hour ago)
 - Quillen ETSU Physicians added 1 notes to your health record. (Sunday, August 24, 2014)
 - Quillen ETSU Physicians canceled 1 appointments. (Friday, August 22, 2014)
 - Quillen ETSU Physicians added 1 appointments to your record.

What can the patients do with the portal?

- Request Rx Renewals
- Fill out forms before their visit
- Receive email care reminders
- Request appointments
- Send secure messages



How do I handle the FMH tasks?

FollowMyHealth messages that come in from the patients need to be responded to within 48 hours (at the latest). So make sure these are handled before the end of the day (if possible). If they come in to a resident, and the message is something that needs to be addressed ASAP, please ask your office manager how best to handle the situation.

Think of FMH tasks as another type of phone call – they should all be responded to before the end of the day, whenever possible.

FMH tasks – FMH Patient Message (Cont.)

2. View the patient's message in pane 1
3. Type a response to the Patient in pane 2
4. Click Reply
5. When you click reply the task drops off your list and the message is sent to the patient's portal

The screenshot shows a web browser window titled "Follow My Health - Patient Communication -- Webpage Dialog". The main content area is titled "FollowMyHealth™ - Patient Communication" and is divided into several sections:

- Patient:** A form containing patient details: Name: [R] TEST, MONACO; Sex: F; MRN: 001000651682701; DOB: 03 Mar 1979; Address: 222 E MAIN ST, JOHNSON CITY, TN 37604; Home Phone: (423)123-4567; Work Phone: (423)123-4567.
- Patient Message:** A text area showing the patient's message: Subject: I am in pain!; Body: I have an earache.
- Response to Patient:** A text area containing the response: "Please schedule an appointment with the office to come in tomorrow."
- End Communication:** A checkbox labeled "End Communication" which is checked.
- Communication History:** A list of previous communications: Sent: Tuesday, August 26, 2014 1:23:32 PM; Sender: Monaco Test; Subject: I am in pain!; Body: I have an earache.

At the bottom of the form, there are two buttons: "Reply" and "Cancel".

FMH tasks – FMH Rx Renewal

P	D	Task	Patient	Assigned To
		FMH Rx Renewal	TEST,MONACO	ALLSCRIPTS,Provider

1. Double click on task

The screenshot displays a medical software interface with a patient's problem list on the left and a 'Follow My Health - Rx Renewal Request' dialog box on the right.

Patient Information:

- Name: [R] TEST,MONACO
- Sex: F
- MRN: 001000651682701
- DOB: 03 Mar 1979
- Address: 222 E MAIN ST, JOHNSON CITY, TN 37604
- Home Phone: (423)123-4567
- Work Phone: (423)123-4567

Medication Details:

- Provider: ALLSCRIPTS, Provider
- Medication: Ibuprofen 800 MG Oral Tablet
- Sig: Take 1 Tablet 3 Times Daily After Meals.

Patient Comments:

Please renew. I am still in pain!

Pharmacy:

Quillen ETSU Physicians, 222 East Main Street Johnson City Tennessee 37604, (423) 433-6003

Response to Patient:

[Empty text area]

End Communication

Communication History:

Sent: Tuesday, August 26, 2014 1:21:51 PM
 Sender: Monaco Test
 Subject: Rx Renewal Request
 Body: Ibuprofen 800 MG Oral Tablet Take 1 Tablet 3 Times Daily After Meals.

Problem List:

Name	ICD-9	Managed By	Last Assessed
Active			
Abdominal pain	789.00		22Aug2014
Ankle sprain	845.00		12Aug2014
Behavior disorder	312.9		11Aug2014
DM (diabetes mellitus), type 2, uncontrolled	250.02		26Aug2014
Dyslipidemia	272.4		22Aug2014
Joint disorder	719.90		04Aug2014
Tachy-brady syndrome	427.81		30Jun2014
Health Maintenance	V70.0		27Jun2014
Past Medical History			
History of Abdominal discomfort,...	789.07		25Jun2014
History of Abdominal pain, periumbilical	789.05		25Jun2014
History of Acquired auditory processing...	388.45		
History of Anxiety	300.00		25Jun2014
History of Appendectomy			

FMH tasks – FMH Update Pharmacy

1. Double click on the FMH task.

View: Current Patient - Active View Desc... Show: 50

P	D	Task	Patient	Assigned To	Created By
		Verify Patient Results	TEST,TONY	ALLSCRIPTS,Provider	ALLSCRIPTS,Provider
Y		FMH Update Pharm	TEST,TONY	ALLSCRIPTS,Provider	System
Y		FMH Update Ins	TEST,TONY	ALLSCRIPTS,Provider	System
Y		FMH Update Demo	TEST,TONY	ALLSCRIPTS,Provider	System

2. Verify the New Preferred Pharmacy
3. Make note of the New Preferred Pharmacy and “X” out
4. Go into the information button (blue “I”) and change the pharmacy
5. Go back to task and respond to patient
6. Click reply, the task drops off your task list and a response goes to the patient.

Follow My Health - Demographics Change Request -- Webpage Dialog

FollowMyHealth™ - Preferred Pharmacy Change Request

Patient Information
Name: [R] TEST,TONY Sex: F MRN: 001000772890001
DOB: 11 Jun 1970
Address: 111 MAIN STREET
JOHNSON CITY, TN 37604

Home Phone: (123)111-1010 Work Phone: Email:

New Preferred Pharmacy
Name: KROGER PHARMACY #279 1919 S ROAN ST
Address: 1919 S ROAN ST
JOHNSON CITY, Tennessee 37601-7579

Response to Patient:

End Communication

Communication History:
Sent: Wednesday, June 03, 2015 3:12:15 PM
Sender: Tony Test
Subject: Preferred Pharmacy Update
Body: Name = KROGER PHARMACY #279 1919 S ROAN ST
Address = 1919 S ROAN ST
JOHNSON CITY, Tennessee 37601-7579

Reply Cancel

FMH tasks – FMH Update Pharmacy (Cont.)

Follow My Health - Demographics Change Request -- Webpage Dialog

FollowMyHealth™ - Preferred Pharmacy Change Request

Patient Information
Name: TEST,TONY **Sex:** M **MRN:** 001000772890001
Address: 111 MAIN STREET
 JOHNSON CITY, TN 37604

Home Phone: (123)111-1010 **Work Phone:** **Email:**

New Preferred Pharmacy
Name: PRINCETON DRUG 105-A BROYLES DRIVE
Address: 105-A BROYLES DRIVE
 JOHNSON CITY, Tennessee 37601-2517

Response to Patient:

End Communication

Communication History:
 Sent: Friday, August 29, 2014 2:22:21 PM
 Sender: Tony Test
 Subject: Preferred Pharmacy Update
 Body: Name = PRINCETON DRUG 105-A BROYLES DRIVE
 Address = 105-A BROYLES DRIVE
 JOHNSON CITY, Tennessee 37601-2517

Reply Cancel

Pharmacy

Retail Pharmacy	Default	Address	City
PRINCETON DRUG	Y	105-A BROYLES DRIVE	JOHNSON CITY
TouchWorks Test Pharmacy	N	222 Merchandise Mart Plaza	Chicago
WALGREENS DRUG STORE 09306	N	3900 FORT HENRY DR	COLONIAL HEIGHTS

Follow My Health - Demographics Change Request -- Webpage Dialog

FollowMyHealth™ - Preferred Pharmacy Change Request

Patient Information
Name: TEST,TONY **Sex:** M **MRN:** 001000772890001 **DOB:** 11 Jun 1975
Address: 111 MAIN STREET
 JOHNSON CITY, TN 37604

Home Phone: (123)111-1010 **Work Phone:** **Email:**

New Preferred Pharmacy
Name: PRINCETON DRUG 105-A BROYLES DRIVE
Address: 105-A BROYLES DRIVE
 JOHNSON CITY, Tennessee 37601-2517

Response to Patient:
 I have changed your preferred pharmacy to princeton drug.

End Communication

Communication History:
 Sent: Friday, August 29, 2014 2:22:21 PM
 Sender: Tony Test
 Subject: Preferred Pharmacy Update
 Body: Name = PRINCETON DRUG 105-A BROYLES DRIVE
 Address = 105-A BROYLES DRIVE
 JOHNSON CITY, Tennessee 37601-2517

Reply Cancel

Tasks – Verify Patient Results

1. Double click on the task.

View: My Active Tasks View Desc... Show: 50 Last Updated: 06/04/2015 7:44 AM

P	D	Task	Patient	Assigned To	Created By	Created On	Status	ID	Due	MRN
		Finish Note	TEST,TONY	ALLSCRIPTS,Provid	System	06/03/2015 04:15	Active	3070415		00100077289000
		Verify Patient Results	TEST,TONY	ALLSCRIPTS,Provid	ALLSCRIPTS,Provid	06/03/2015 03:35	Active	3070183		00100077289000
		Finish Note	TEST,MONACO	ALLSCRIPTS,Provid	System	06/02/2015 08:54	Active	3064047		00100065168270

Verifying results of patients that are enrolled in FollowMyHealth will send their results to the portal.

ETSU - Clinician Worklist

NB: H/O delirium superimposed on profound dementia

Worklist Problem Notes Labs Procedures Radiology Chart

Clinician Worklist TEST, TONY

3 Items : 9 Active Patient Tasks

Resulted - Requires Verification

Thyroid Stimulating Hormone (TSH) ALLSCRIPTS, Provider Final 03Jun2015 03:32PM

Test	Result	Flag	Reference
test work			
TSH (3rd Generation)	123		
TSH	111		
TSH, 3RD GENERATION	222		
TSH	333		
TSH	444		
TSH	555		
COMMENT:	666		

Lipid Panel (Lipid Profile) ALLSCRIPTS, Provider Final 03Jun2015 03:35PM

Test	Result	Flag	Reference
NON-HDL CHOLESTEROL	111		
CHOL/HDL Ratio	222		
CHOLESTEROL, TOTAL	333		
HDL CHOLESTEROL	444		
TRIGLYCERIDES	555		
LDL-CHOLESTEROL	666		
CHOL/HDL C RATIO	777		
NON HDL CHOLESTEROL	888		

Verify Authorize Authorize All Update Provider Review Print Results

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Orders Allergies Immunizations Flo

VitalSigns/Findings Refresh

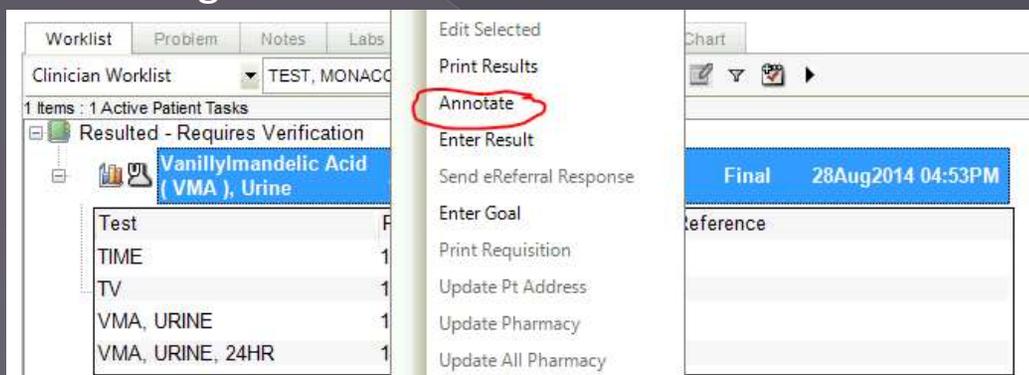
Data Includes: All Select 18 Sep 2014 12 Aug 2014

Item Name	Select	10:35 AM	4:26 PM	4:
Systolic	<input type="checkbox"/>	120	120 , LLE,....	100
Diastolic	<input type="checkbox"/>	84	85 , LLE,....	75
Temperature	<input type="checkbox"/>	98 F	100.2 F ,...	
Heart Rate	<input type="checkbox"/>	72	45	
Respiration	<input type="checkbox"/>	20		
Height	<input type="checkbox"/>	6 ft 5 in	6 ft 5 in	6 ft 9
Weight	<input type="checkbox"/>		225 lb 3 oz	175 lb
BMI Calculated	<input type="checkbox"/>		26.7kg/m2	18.75
BSA Calculated	<input type="checkbox"/>		2.35m2	2.19m

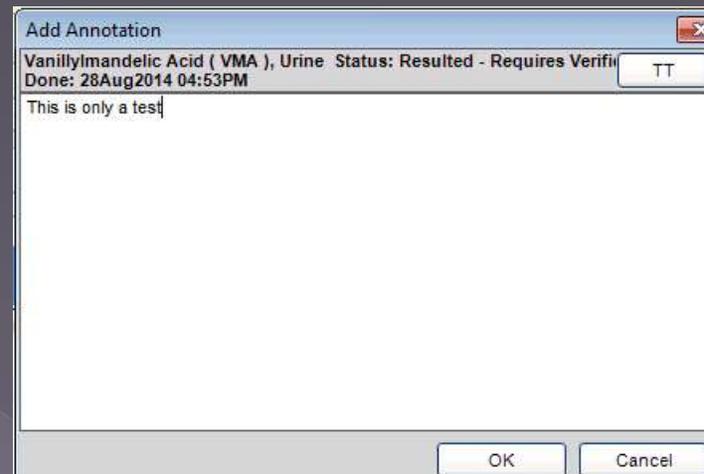
New Edit Enter Result Print

Verifying Patient Results

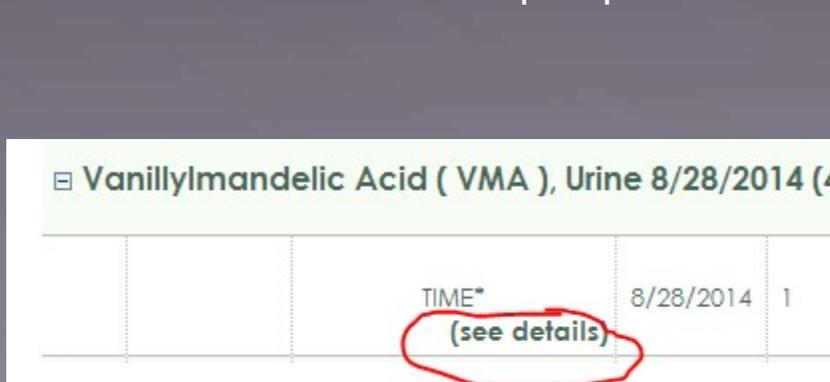
1. View lab either by going to worklist or tasklist
2. Right click on the lab and choose Annotate



3. Add annotation in the box, click ok



4. Verify the lab, commit and Save and Continue
5. Annotation will show up in portal



Provider-Initiated FMH Message

1. Pull up portal patient, go to the Task List, choose New
2. Choose the FMH Patient Message Task
3. Assign to: the task should be assigned to You, the provider
4. Type the message and click okay

Task Detail -- Webpage Dialog

Task Details

Task Filters

1 Not about a patient 2 Concerning patient TEST,MONACO

Assign To: User Team Task: **FMH Patient Message**

Franko,John Priority: Routine Status: Active

Comment:

Testing

Text Templates...

Activate: 15 Dec 2014 4:59 PM Overdue: 22 Dec 2014 4:59 PM

Create Notify Task When: Complete Overdue

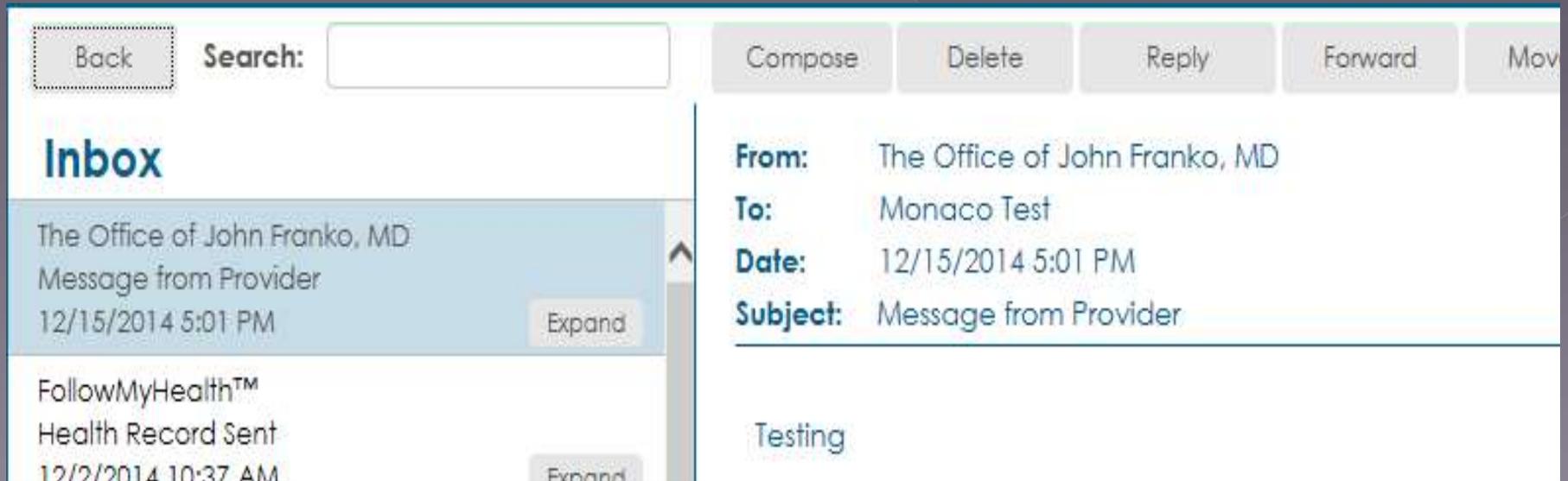
Notify: Briggs,Monaco Priority: Routine

Delegate

Provider-Initiated FMH Message (Cont.)

****Keep in mind, the patient will be able to reply to this message.****

The patient will receive a message inside their portal that looks like the following:



The screenshot displays a patient portal interface. At the top, there is a navigation bar with a "Back" button, a "Search:" field, and several action buttons: "Compose", "Delete", "Reply", "Forward", and "Move". Below the navigation bar, the "Inbox" section is visible. It contains two message entries. The first entry is highlighted in blue and reads: "The Office of John Franko, MD", "Message from Provider", "12/15/2014 5:01 PM", and "Expand". The second entry reads: "FollowMyHealth™", "Health Record Sent", "12/2/2014 10:37 AM", and "Expand". To the right of the inbox, the details of the selected message are shown: "From: The Office of John Franko, MD", "To: Monaco Test", "Date: 12/15/2014 5:01 PM", and "Subject: Message from Provider". Below the subject line, the word "Testing" is visible.

Sending Invites to join
FollowMyHealth Patient Portal

I. How to invite a patient to join FollowMyHealth Patient Portal

1. Login



Located on your desktop
[Only for Dashboard users]

Dashboard users will have access to invite patients, connect patients, and add authorized individuals to the patient portal.

The screenshot shows the login page for the FollowMyHealth dashboard. At the top left is the logo for Quillen ETSU Physicians, East Tennessee State University. At the top right is a help icon (headset) with the text "Need Help with the Portal? Call Us: 1-888-670-9775" and "Or click the Help link below to email us or search portal FAQs". Below the header is a banner image of a brick wall with the text "JAMES H. QUILLEN College of Medicine EAST TENNESSEE STATE UNIVERSITY". The main content area has the heading "Sign in to access the FollowMyHealth Dashboard". Below this is a login form with a green FMH logo, a text input field, a "Password" label, another text input field, a blue "Sign In" button, and a link "Forgot your password?". Below the form is a link "or, use an alternative". At the bottom right are links for "Support", "Help", and "English".

2. Click Patients in left menu, then click Invite Patient.

The screenshot shows the 'FollowMyHealth' web application interface. The top navigation bar includes the logo 'FollowMyHealth', the version '18.3 CU3', and user information 'Tony Houston' with a 'Support' link. A left-hand navigation menu is visible, with 'Invite Patient' highlighted. The main content area is titled 'Invite Patient' and contains a search form on the left and a search results table on the right. The search form has four radio button options: 'First Name', 'Last Name', 'Social Security Number', and 'Date of Birth'. The 'Date of Birth' field includes a calendar icon. A 'Search' button and a link to 'Advanced Search' are at the bottom of the form. The search results table has columns for 'Portal Member', 'Invite Patient', 'First Name', 'Last Name', 'DOB', 'Email', 'SSN', 'Phone', and 'Organization'. The table is currently empty, showing '0 Patient(s) Selected' and an 'Invite' button.

3. Find patient account by using one of the following:

First/Lastname

Social Security Number (SSN)

Medical Record Number (MRN)

Date of Birth (DOB)

Click “Search.”

FollowMyHealth 18.3 CU3 Tony Houston Support

Home > Patients > Invite Patient

Invite Patient

Search Type

First Name

Last Name

Social Security Number

MRN

Date of Birth 28

[Advanced Search](#)

Search Results 0 Patient(s) Selected

Postal Member	<input type="button" value="Invite Patient"/>	First Name	Last Name	DOB	Email	SSN	Phone	Organization
▼ Quillen ETSU Physicians (50)								
	<input type="radio"/>	Male	Test	01-Jan-0001				Quillen ETSU Physicians
	<input type="radio"/>	Mickey	Test	01-Jan-2018		XXX-XX-3333	(423) 333-7777	Quillen ETSU Physicians
	<input type="radio"/>	Mitchell	Test	13-Apr-1933	TEST@TEST.ORG	XXX-XX-6789	(423) 123-4567	Quillen ETSU Physicians
Member		Monaco	Test	03-Mar-1979	BRIGGSMM@ETSU.EDU	XXX-XX-6789		Quillen ETSU Physicians
Member		Tony	Test	11-Jun-1970	HOUSTONU@ETSU.EDU	XXX-XX-0120	(123) 111-1010	Quillen ETSU Physicians
	<input type="radio"/>	Tonya	Test	29-Mar-1973		XXX-XX-3333		Quillen ETSU Physicians
Member		Tracy	Test	01-Jan-1969	JONESTL@ETSU.EDU	XXX-XX-6789	(423) 123-4567	Quillen ETSU Physicians
	<input type="radio"/>	Amber	Tester	30-Aug-1985		XXX-XX-3983	(423) 268-3155	Quillen ETSU Physicians
	<input type="radio"/>	Amber	Tester	12-Oct-2005		XXX-XX-4225		Quillen ETSU Physicians
	<input type="radio"/>	Austyn	Tester	31-Dec-2008		XXX-XX-5901	(423) 948-1417	Quillen ETSU Physicians
	<input type="radio"/>	Barbara	Tester	27-Jul-1952		XXX-XX-7723	(423) 213-5992	Quillen ETSU Physicians
	<input type="radio"/>	Becca	Tester	16-Feb-2008		XXX-XX-0874	(423) 538-1567	Quillen ETSU Physicians
	<input type="radio"/>	Betty	Tester	01-Nov-1930		XXX-XX-8273	(423) 330-6838	Quillen ETSU Physicians
	<input type="radio"/>	Burless	Tester	11-Jul-1960		XXX-XX-2851	(423) 967-3095	Quillen ETSU Physicians

4. Select the patient by clicking the button next to their name. Click “Invite” at the upper right corner.

5. When the Send Invite window pops up...

- Enter the correct date of birth using MM/DD/YYYY format
- Enter valid email address from patient
- Security (defaults to last 4 digits of SSN)
- Click "Send."

Inform the patient they should receive the invitation in their email inbox within the next 24 hours.

If they cannot see it, they should check their Spam folder just in case.

The screenshot shows a 'Send Invite' form with the following fields and values:

Field	Value
First Name	Tonya
Last Name	Test
Confirm Birthdate	DD-MMM-YYYY 28
Email	
Patient Security Code	3333

Buttons: Cancel, Send Invite

II. How to invite a Authorized Individual (Proxy) of a patient to join the FollowMyHealth Patient Portal

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

1. Click Patients in left menu, then click Authorized Individuals.

FollowMyHealth 18.3 CU3 Tony Houston Support

Home Admin Communications Forms Organization Patients **Authorized Individuals** Incoming Requests Invite Patient Provider Access Manage Providers Reports

Home > Patients > Authorized Individuals
Authorized Individuals

Search Type

First Name

Last Name

Social Security Number

MRN

Date of Birth

Search

Advanced Search

Add Authorized Individual

Search Results 0 Patient(s) Selected View Pending Authorized Individuals Add Patient to Invite

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

Authorized Individuals for this Patient Authorized Individuals for Others

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Access	Health Record Updates
--------------	------------	-----------	---------------	-----	-------	--------	-----------------------

2. Enter the patient's information by one of the following:

First Name/Last Name

Social Security Number (SSN)

Medical Record Number (MRN)

Date of Birth (DOB)

Click Search

3. Locate the patient in the top right box. If this patient already has authorized individuals set up, they will appear in the lower box.

Select “Add Patient to Invite.” Note the patient’s name will now appear in the Add Authorized Individual box in the lower left side.

FollowMyHealth 18.3 CU3 Tony Houston ▾ Support

Home ▾
Admin ▾
Communications ▾
Forms ▾
Organization ▾
Patients ▾
Authorized Individuals
Incoming Requests
Invite Patient
Provider Access ▾
Manage Providers
Reports ▾

Home ▾ Patients ▾ Authorized Individuals

Authorized Individuals

Search Type

First Name:

Last Name:

Social Security Number:

MRN:

Date of Birth:

Add Authorized Individual

▼ **Tonya Test**
Quillen ETSU Physicians

Search Results 0 Patient(s) Selected

Portal Member	<input type="button" value="Select Patient"/>	First Name	Last Name	DOB	Email	SSN	Phone	Organization
▼ Quillen ETSU Physicians (50)								
	<input type="radio"/>	Male	Test	01-Jan-0001				Quillen ETSU Physicians
	<input type="radio"/>	Mickey	Test	01-Jan-2018		XXX-XX-3333	(423) 333-7777	Quillen ETSU Physicians
	<input type="radio"/>	Mitchell	Test	13-Apr-1933	TEST@TEST.ORG	XXX-XX-6789	(423) 123-4567	Quillen ETSU Physicians
Member	<input type="radio"/>	Monaco	Test	03-Mar-1979	BRIGOSMM@ETSU.EDU	XXX-XX-6789		Quillen ETSU Physicians
	<input type="radio"/>	Rhonda	Test	01-Jan-1970	TEST@ETSU.EDU	XXX-XX-4444		Quillen ETSU Physicians
Member	<input type="radio"/>	Tony	Test	11-Jun-1970	HOUSTONU@ETSU.EDU	XXX-XX-0120	(123) 111-1010	Quillen ETSU Physicians
	<input checked="" type="radio"/>	Tonya	Test	29-Mar-1973		XXX-XX-3333		Quillen ETSU Physicians
Member	<input type="radio"/>	Tracy	Test	01-Jan-1969	JONESTL@ETSU.EDU	XXX-XX-6789	(423) 123-4567	Quillen ETSU Physicians

Authorized Individuals for this Patient | **Authorized Individuals for Others**

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Access	Health Record Updates
--------------	------------	-----------	---------------	-----	-------	--------	-----------------------

4. Use the scrollbar down to the bottom of the left hand side. Click “Invite Authorized Individual.”

The screenshot displays a patient management interface. On the left, there is a sidebar with a search filter for 'Date of Birth' set to 'DD-MMM-YYYY' with a calendar icon showing '28'. Below this is a 'Search' button and an 'Advanced Search' link. The sidebar also contains a section for 'Add Authorized Individual' with a dropdown menu showing 'Tonya Test' and 'Quillen ETSU Physicians'. At the bottom of the sidebar, there are buttons for 'Remove Patient' and 'Invite Authorized Individual', with the latter highlighted in yellow. The main content area shows a table of authorized individuals for a patient. The table has columns for 'Relationship', 'First Name', 'Last Name', 'Date of Birth', 'SSN', 'Email', and 'Access'. The table is currently empty. Above the table, there are two tabs: 'Authorized Individuals for this Patient' (selected) and 'Authorized Individuals for Others'. At the bottom right of the main content area, there is a 'Suspend Authorized Individual' button.

Relationship	First Name	Last Name	Date of Birth	SSN	Email	Access
--------------	------------	-----------	---------------	-----	-------	--------

5. Enter the Authorized Individual's First and Last Name and Email Address

- Input security code as the birth year of the patient, authorized individuals will use this code during registration
- Input the Authorized Individual's phone number, street address, city, state, and zip code
- Click "Send Invite" to finish.

The screenshot shows a web form titled "Invite Authorized Individual" with a close button (X) in the top right corner. The form is divided into two main sections: "Basic Information" and "Full Access Information".

Basic Information:

- First Name: Tony
- Last Name: Houston
- Email Address: tonyhouston@hotmail.com
- Security Code: 1973

Full Access Information:

- Country: United States (dropdown menu)
- Telephone Number: 4239991234
- Street Address: 222 east main street
- City: johnson city
- State: Tennessee (dropdown menu)
- Zip Code: 37615

At the bottom right, there are two buttons: "Cancel" and "Send Invite". The "Send Invite" button is highlighted in yellow.

Below the "Basic Information" section, there is a table with columns for Patient, Relationship, and Access Level.

Patient	Relationship	Access Level
Tonya Test	Other	Full Access

Common errors during invitation process

Wrong email addressed entered – Please verify the email address that is used for the invite is the email address that is on the portal registration consent form

Incomplete portal registration forms – Please verify the portal registration consent is filled out completely, signed and dated. Ensure you are able to read and verify the email address. Form will have to be scanned and filed in patient's chart

Invite code – Remind patients the invite code is the last 4 digits of SSN on file. For proxies, the invite code is the birth year of the patient

Patients don't read invite email completely – There are detailed instructions in the invite email that will help patients complete the registration process

If the patient has any questions or concerns,
they can contact FMH Helpdesk at 888-670-9775 or
support@followmyhealth.com