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Chapter 1

Supported browsers

The following browsers are supported by the FollowMyHealth patient portal.

- Microsoft® Internet Explorer® 9.0 or later
  
  **Note:** You must use Microsoft® Internet Explorer® 10.0 or later if you want to view goals from the Goals tab.

- Mozilla Firefox® 38 or later
- Google Chrome™ 34 or later
- Apple® Safari® 8.0 or later

FollowMyHealth is compliant with Web Content Accessibility Guidelines (WCAG) 2.0, Level A.
Chapter 1 Supported browsers
Chapter 2

FMH Secure Sign In account

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

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

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

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

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

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

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

Recover your FMH Secure Sign In user name

You can recover your FMH Secure Sign In user name by contacting your healthcare organization’s support team.

1. From the patient portal static toolbar click My Account > Support > Support Information. Support information opens.

2. Contact the support team.
   A support representative sends your user name to the email account that is associated with your patient portal account.

3. Go to the email account that is associated with your patient portal account.
4. Find the email from your support representative. Open the email to recover your user name.

**Results of this task**
Your user name is recovered.

**What to do next**
Use your user name to sign in to the patient portal or to recover your password.

---

**Reset your FMH Secure Sign In password**

You can reset your FMH Secure Sign In password from the patient portal sign-in window.

1. Go to the patient portal sign-in window.
2. Click *Forgot your password*.
   A window opens where you can enter your user name.
3. Enter your user name and click *Reset*.
   Your user name is required to reset your password. If you forgot your user name, contact your healthcare organization’s support team. Your healthcare organization can send an email message to the email address associated with your FollowMyHealth account that includes your FMH Secure Sign In user name.
   
   A message is displayed that you have requested a password reset. An email with instructions to complete the reset process is sent to the email address associated with your FollowMyHealth user name (not your patient portal inbox).
4. Go to your email that is associated with your patient portal account.
5. Open the FMH Secure Login Password Reset Request message.
6. Click *Reset Password*.
   *Update Password* opens.
7. For *New password*, enter a password.
8. For *Confirm new password*, re-enter the password.
9. Click *Save*.

**Results of this task**
Your password is reset.

**What to do next**
Use your password to sign in to the patient portal.
Chapter 3

Get started as a new patient portal user

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

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

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

Create a new FollowMyHealth account through an email invitation

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

Before you begin

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

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

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

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

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

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

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

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

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

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

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

7. Click **Next**.
Connect your account Step 2: Accept Terms of Service opens.
8. Click I Accept to accept the terms of service.

Note: You must accept the terms of service. You can also access the privacy policy on this step by clicking Privacy Policy.

Connect your account Step 3: Enter Invite Code opens.
9. Enter the invitation code from your healthcare organization and click Next.

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

Connect your account Step 4: Release of Information opens.
The ROI permits FollowMyHealth to obtain and store your medical information from the organization. If you decline, you are not connected to the organization, cannot view your medical information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.
The organization can configure the ROI expiration date, such as annually, and you are required to accept the ROI again upon expiration. When you sign in to FollowMyHealth and the ROI is expired, Release of Information opens. You must click I Accept to renew the ROI and stay connected to the organization and continue to view your medical information. If you click Decline, a confirmation window opens where you must confirm that you want decline the ROI. Declining the ROI stops your ability to receive health record updates and interact with providers from the organization.

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

Connect your account Step 5: Upload Health Record opens.
This window displays the progress of retrieving data from the organization. Monitor the progress to ensure the data is uploaded successfully.
When the upload is complete, the patient portal opens.

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

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

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

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

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

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

1. Go to www.followmyhealth.com or the URL provided by the organization.
   The FollowMyHealth sign-in window opens.
Note: Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but **Sign In** and **or, use an alternative**, and **I need to sign up** are always displayed.

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

**Notifications Email**

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

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

Specify the first name of the account holder.

Last Name

Specify the last name of the account holder.

Date of Birth

Specify the account holder's date of birth.

Zip Code

Specify the ZIP Code of the account holder.

Home Phone Number

Specify the home phone number of the account holder. Select the country code. Click the country drop-down list and select a country code represented by a flag. This is optional.

+1 Canada
+44 United Kingdom
+1 United States

Social Security Number

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

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

6. Click **I Accept**.
   Your registration request is submitted and you will receive an email when your account is available.
   **Sign Up and Connect** opens.
7. For **Create Username**, enter a user name that meets the requirements listed on the right side of the window.
   The application automatically fills the **Create Username** box with your email address because it is best practice to use your email address as your user name.

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

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

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

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

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

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

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

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

13. **Click I Accept.**
**Connection Request Successful** opens.

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

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

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

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

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

4. Click Finish.
   Connection Request Successful opens.

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

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

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

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

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

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

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

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

2. Click Sign Up and Connect. Sign Up and Connect opens.
3. Enter the applicable information in the boxes. Demographic information is automatically filled based on the information that your provider has recorded for you. Complete the empty boxes.

Notifications Email

Specify an email address where you can receive notifications regarding your health record. This email address is also used for your user name. The Create Username box is automatically filled with email when you get to the step to create a user name and password.
After you create your account, this same email address is also listed under **My Info > Demographics > Contact Information**.

**First Name**
Specify the first name of the account holder.

**Last Name**
Specify the last name of the account holder.

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

**Zip Code**
Specify the ZIP Code of the account holder.

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

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

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

6. Click **I Accept**.
Your registration request is submitted and you will receive an email when your account is available.
**Sign Up and Connect** opens.
Create a new FollowMyHealth account and connect to another account as an authorized individual

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

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

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

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

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

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

11. Click **Next**. 

    Register as an authorized individual Step 2: Enter Invite Code opens.
12. Enter the invitation code that you received when you requested authorized individual access and click **Next**.
The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

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

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

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

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

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

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

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

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

14. Click **I Accept**.

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

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

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

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

A list of names is displayed.

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

The patient's FollowMyHealth account opens.
Create a new FollowMyHealth account and connect to another account as an authorized individual

**Results of this task**

You have created a new account and connected to another account as an authorized individual. View pending connections at **My Account > My Connections**.
Chapter 4

Sign in as an existing user

Sign in as an existing user with an alternative authentication method

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

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

The FollowMyHealth sign-in window opens.
2. Click the or, use an alternative button. The icons for the alternative sign in methods are displayed.
Note: Your most recent authentication method is retained. If you sign in using an alternative method, the next time that you sign in, the alternative option is automatically displayed as the default sign-in method. If you sign in using FMH Secure Sign In, the next time that you sign in, the FMH Secure option is automatically displayed as the default sign-in method.

3. Click your preferred authentication method.
A message is displayed to inform you that you are first directed to the third party authentication window to sign in and then redirected back to FollowMyHealth.

4. Click OK.
The alternative authentication window opens.

5. Enter your user name and password and sign in.
The patient portal opens.
Sign in as an existing user with FMH Secure Sign In

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

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

   The FollowMyHealth sign-in window opens.

2. Click Sign In.
   The Email or username and Password boxes are displayed.

   The email address that you entered when you created an account is also listed under My Info > Contact Information > Demographics, as the FMH Secure Sign In user name, and for notifications.
Sign in as an existing user with FMH Secure Sign In

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

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

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

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

3. Enter your FMH Secure Sign In user name and password and click Sign In.
   The patient portal opens.
Connect your existing account to a new organization or to an authorized individual

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

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

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

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

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

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

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

1. From the email, click the Click here to begin registration link. The FollowMyHealth sign-in window for new connections opens.
Note: Organizations can customize the portal sign-in window. The graphics, colors, and text might look different, but Sign Up and Connect and Sign in and add this connection are always displayed.

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

3. Enter your existing FollowMyHealth account credentials.

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

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

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

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

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

Connect your account Step 3: Release of Information opens.

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

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

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

Connect your account Step 4: Upload Health Record opens.

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

Results of this task

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

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

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

Before you begin

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

![FollowMyHealth sign-in window](image)

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

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

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

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

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

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

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

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

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

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

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

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

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

7. Click **I Accept**.

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

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

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

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

   A list of names is displayed.

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

   The patient's FollowMyHealth account opens.
Chapter 5

Static toolbar

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

**Figure 1: Static toolbar**

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

**Message**

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

**Request Appt**

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

**Hello**

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

**My Account**

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

**Español**

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

Click the Search icon to search all tabs in FollowMyHealth.

Search the patient portal

You can search all tabs and windows in your health account by using the search icon located in the static toolbar. Searching with the search mechanism is more efficient than manually searching each window for clinical results or information.

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

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

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

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

**Results of this task**
You have used the search icon to find results and information in your health account.

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

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

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

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

   Connections are divided into categories, including connections with clinicians and organizations, connections with applications and devices through **Health Sources**, and connections with family members and dependents.
2. Click **Visualize Connections** to view the details about each connection. **Visualize My Connections** opens.
Your healthcare organizations, as known by FollowMyHealth, are displayed in an interactive graph on Visualize Connections. You are represented by your picture in the center of the graph. The healthcare organizations that you are connected to, authorized individual (proxy connections) representation, and clinical settings star burst from your photo.

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

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

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

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

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

You can add a connection to an organization from My Account > My Connections. When you are connected to an organization, the results and information from your visits are available in your patient portal health account.

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

**First Name**

Enter the first name of the account holder.

**Middle Name**

Enter the middle name of the account holder. This is optional.
Last Name

Enter the last name of the account holder.

Suffix

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

Date of Birth

Enter the date of birth of the account holder.

Social Security Number

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

Email

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

Primary Phone

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

Street

Enter the street number of the account holder.

City

Enter the city of the account holder.

State

Enter the state of the account holder.

Zip Code

Enter the ZIP Code of the account holder.

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


12. Click OK.

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

Configure organization clinic settings
You can manage connections to organizations and clinic settings associated with the organization. For example, if you do not want to receive specific types of clinical results from an organization, you can turn off the clinical settings for that organization.

The settings include prescriptions, personal health records, news, appointments, and billing.

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

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

3. Click the organization name that you want to edit. Edit Organization Settings opens.
Turn on and off clinic settings that you want to include in your connection by clicking 

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

4. Click **Close**.

**Results of this task**
You have configured the clinical settings that you want to receive from your organization.
View providers

Providers that you have a connection with are displayed in My Connections if the organization enables the provider names to display. You can then perform tasks from the provider's information section, such as schedule an appointment, renew a prescription, or request a consultation.

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

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

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

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

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

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

Results of this task

You have viewed the providers in your organization and the tasks available to interact with your provider.
**Send a provider profile**

You can share a provider profile as a way to refer your provider to family and friends.

1. From the static toolbar, click **My Account > My Connections**.  
   **My Connections** opens.
2. Click the **With Providers and Healthcare Organizations** tab.
3. From **What do you want to do**, select **Send Profile to a Friend**.  
   **Share Provider Profile** opens.
4. Enter the email address of the person that you want to send the profile to, a subject, and message.
5. Click **Send**.  
   **Email Confirmation** opens.
6. Click **OK**.

**Results of this task**

An email that includes the provider profile is sent. A copy of the message is displayed in the **Sent** folder in your **Inbox** tab.

**Add an authorized individual to access your account**

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

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

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

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

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

6. Click **OK** to send the authorized individual invitation.

**Results of this task**
You have sent an invitation to an individual who can complete the authorized individual invitation process and access your health account.

**Manage billing**

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

The following sections are available in **Billing.**

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

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

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

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

**Viewing your invoices**

If your provider supports billing payments, you can pay your invoices from the patient portal account.

There are several ways to view your invoices.

- From **Billing** on the **Home** tab.
- From **Action Center** on the **Home** tab.
Chapter 5 Static toolbar

> From My Account > Billing on the static toolbar.

**View your invoices from Billing on the Home tab**

You can view and access the invoices that you are responsible for paying from the Billing section on the patient portal Home tab.

1. From the patient portal Home tab, scroll down to the Billing section at the bottom right. Your open invoices are listed in the Billing section by billing group.

2. Click Details next to the invoice that you want to view. The Billing page for the billing group that is connected to the invoice opens with Patient Responsibility expanded.

3. To view more details about the procedures that you were invoiced for, click the link in the Procedure column. Procedure opens. The type of office visit, lab work, and other tests are displayed in a list.

**Results of this task**

You have opened the Billing page and viewed your invoice.

**What to do next**

Pay your invoice.

**View your invoices from Action Center**

You can access and view your unpaid invoices from Action Center on the patient portal Home tab.

1. From the patient portal Home tab, go to Action Center.

2. Click the unpaid invoices notification in Action Center. Unpaid Invoices opens.

3. Select the invoice that you want to view. The Billing page for the billing group that is connected to the invoice opens with Patient Responsibility expanded.

4. To view more details about the procedures that you were invoiced for, click the link in the Procedure column. Procedure opens. The type of office visit, lab work, and other tests are displayed in a list.

**Results of this task**

You have opened the Billing page and viewed your invoice.
What to do next
Pay your invoice.

View your invoices from My Account
You can access and view your invoices from the patient portal static toolbar at My Account > Billing.

There are 3 categories on Billing:

- Patient Responsibility
- Pending with Insurance
- Paid Invoices

The default view is Patient Responsibility, which is expanded when Billing opens.

1. From the patient portal, click My Account > Billing
   Billing opens. The invoices available for payment are displayed under Patient Responsibility.
   Invoices are listed according to the billing group that the invoice is connected to. To view additional invoices that are associated with other billing groups, select the billing group from Billing Group.

2. To view more details about the procedures that you were invoiced for, click the link in the Procedure column.
   Procedure opens. The type of office visit, lab work, and other tests are displayed in a list.

Results of this task
You have opened Billing and viewed your invoices.

What to do next
Pay an invoice.

Pay your invoices
If your provider supports billing payments, you can pay your invoices from the patient portal.

Before you begin
Sign in to the patient portal and view your invoices on Billing. Refer to "Viewing your invoices" to learn the different ways to view your invoices in the patient portal.

Note: If you are connected to a provider that does not support billing, the window is blank and the following message is displayed: Billing is
1. From **Billing > Patient Responsibility**, select an invoice.
   - Select 1 invoice by selecting the check box next to the invoice.
   - Select multiple invoices by selecting the check box next to the invoices.
   - Select **Pay All Invoices**.
   - Enter a partial payment amount for an invoice in **Pay Now**.
The total for the invoices that you selected or the amount that you entered is displayed in **Pay Now**.

2. Click **Pay Now**.
The merchant payment web site opens.

3. Enter your credit card number and other required information.

4. Click **Process Transaction**.
   A confirmation receipt window opens if the transaction is successful and an email is sent to your patient portal inbox.

**Results of this task**
The invoice that you paid is removed from **Patient Responsibility** and added to **Paid Invoices** when the transaction is complete.

**What to do next**
Review your invoices that are pending insurance review. Invoices listed in **Pending With Insurance** are sent to your insurance company for payment. These invoices are not your responsibility for payment at this time.

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

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

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

1. From the **Home** tab, click **My Account > Billing**.
   **Billing** opens.
2. Click **Ask A Billing Question**.
Billing Question opens.

3. From To, select a provider to send the question to.
4. For Subject, enter the purpose for your email.
5. For Body, enter the billing question.
6. Click Send.

A confirmation window is displayed indicating that your email is sent.

Ask a billing question from Compose Email

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

1. From the Home tab, click Inbox > Compose.

Compose Email opens.
2. From To, select a provider to send the question to.

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

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

Results of this task
You have asked a billing question through your email account.
Manage account preferences

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

There are 6 sections in Preferences.

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

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

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

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

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

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

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

2. Click the preference tab that you want to work with. The tab that you selected is displayed.

Manage sign-in methods

Add an alternative sign-in for your patient portal account

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

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

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

**Note:** FMH Secure Sign In credentials are required. You can edit FMH Secure Sign In credentials from this window, but you cannot remove your FMH Secure credentials.

1. From the static toolbar, click **My Account > Preferences**. **Preferences** opens.
2. Click the **Sign In Preferences** tab. The **Sign In Preferences** tab is displayed.
3. Click **Add** next to the authentication method that you want to add. The sign-in window opens for the authentication method.
4. Enter your user name and password for the authentication method. **Remove** changes to **Add** next to the authentication method in **Sign In Preferences**.

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

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

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

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

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

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

4. From **Secure Sign In Notifications**, enter the password in **Email** that you want to use for your notifications.

5. Confirm your new password by entering the password in **Confirm new password**.

6. Click **Change Email**.

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

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

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

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

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

4. Enter your current password in **Current password** and enter a new password in **New password**.

5. Confirm your new password by entering the password in **Confirm new password**.

6. Click **Save**.

**Results of this task**
You have changed your FMH Secure Sign In password.
2-Step Verification

After you create your account with a FMH Secure Sign In credentials, you can add another layer of security verification for your account.

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

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

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

Add 2-Step Verification from your patient portal account

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

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

Email

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

SMS

Select SMS to receive the verification code through a Short Message Service (SMS) text message on your cellular phone. Enter your phone number in Mobile Phone, select your mobile carrier from Mobile Carrier, and click Save.
Select **App** to receive the verification code through the authenticator application on your smart phone. Scan the Quick Response (QR) barcode provided on the window and click **Save**. If you select the authenticator application method, make sure that the application is already installed on your smart phone and available to use before finishing the registration process.

**Results of this task**
The 2-Step Verification sign-in window opens when you use FMH Secure Sign In credentials. Turn off 2-Step Verification method You can turn off the 2-Step Verification feature in the patient portal.

1. From the patient portal status toolbar, click **My Account > Preferences**. **Preferences** opens.
2. Click the **Sign In Preferences** tab. **The Sign In Preferences** tab is displayed.
3. Click **FMH Secure Sign In Preferences**. **Manage Your FMH Secure Sign In Account** opens.
4. Scroll down to **2-Step Verification Preferences**.
5. From the communication method drop-down menu, click **None**.
6. Click **Save**.

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

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

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

1. From the static toolbar, click **My Account > Preferences**. **Preferences** opens.
2. Click the **Notification Preferences** tab. **The Notification Preferences** tab is displayed.
3. Go through each notification type section and select Email or Text Message to configure how you want to receive notifications. The notification email default is the email address used for your 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 is 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 is added to your FollowMyHealth Inbox.

**Updates to Health Record**

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

**Notice of Communication from Provider**

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

**Organization Bulletins**

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

**My Reminders**

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

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

Check In Reminders

Specifies how the organization that you are connected to can send appointment check-in reminders. You can receive an email in your external email account or a text message notifying you when a check-in reminder is 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**.

Change your cell phone number

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

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

1. From the static toolbar, click **My Account > Preferences > Notification Preferences**. The **Notification Preferences** tab is displayed.

2. Click **Change**.

   **Cell Phone Number** opens.

3. Select the country code.

   Click the country drop-down list and select a country code represented by a flag.

   - +1 Canada
   - +44 United Kingdom
   - +1 United States

4. For **Cell Phone**, enter the cell phone number that you want to use for notifications.

5. From **Cell Phone Carrier**, select the cell phone carrier that you use for cell phone service.

6. Click **Verify Cell Phone**.

   FollowMyHealth sends you a validation code text message to your cell phone.
7. For **Validation Code**, enter the validation code that you received through text message.

8. Click **Verify Cell Phone**.
The cell phone number is displayed for **Cell Phone**.

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

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

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

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

1. From the static toolbar, click **My Account > Preferences > Notification Preferences**.
The **Notification Preferences** tab is displayed.

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

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

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

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

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

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

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

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

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

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

1. From the static toolbar, click My Account > Preferences. Preferences opens.
2. Click the Display Preferences tab. The Display Preferences tab is displayed.
3. Change your preferences.

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

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

Note: Head circumference measurements always display in Metric.

Select the units for the following measurements.

Weight

Pounds or Kilograms

Height

Feet and inches or Centimeters
Temperature

Fahrenheit or Celsius

Other Preferences

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

4. Close Preferences.

Results of this task
You have set the display settings for your patient portal account.

Delete your universal health record account

Important: This action permanently deletes your FollowMyHealth account and you no longer have access to your online healthcare record or providers. You cannot recover the deleted data.

1. From the static toolbar, click My Account > Preferences. Preferences opens.
2. Click the Account Preferences tab. The Account Preferences tab is displayed.
3. Click Delete your UHR. A warning message window opens to confirm that you want to delete your account.
4. Click OK to permanently delete your FollowMyHealth account.

Results of this task
You have deleted your patient portal account.


**Restore deleted information**

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

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

1. From the static toolbar, click **My Account** > **Preferences**. **Preferences** opens.
2. Click the **Restore Deleted Items** tab. The **Restore Deleted Items** tab is displayed.
3. Click **Restore** to add deleted items back to your FollowMyHealth account. The previously deleted item is removed from the list and can be found in the corresponding clinical data tab in **My Health**.

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

**View activity history**

**Activity History Log** in **Preferences** lists all of the activity in your patient portal account. For example, you can view detailed information about clinical documents that you downloaded or emailed.

1. From the static toolbar, click **My Account** > **Preferences**. **Preferences** opens.
2. Click the tab. The **Activity History Log** tab is displayed.
3. Click **Previous** or **Next** to page through the **Activity History Log**.

**Results of this task**
You have viewed the **Activity History Log**.
Get technical support and assistance for your patient portal account

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

1. From the static toolbar, click My Account > Support. Support Information is displayed. Several types of assistance are available from this window.

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

3. To access the patient user manual from Preferences, click My Account > Preferences. Preferences is displayed. The User Manual link is displayed in the upper right.


Results of this task
You have accessed the patient user manual and technical support information so that you can learn more about how the patient portal works or ask a technical support representative a question.

Support information

Knowledge Base

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

User Manual

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

The Home tab

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

Health Summary

The Health Summary section on the Home tab includes basic information about you, including age, gender, height, weight, body mass index (BMI), blood pressure, and primary insurance. The information under Health Summary is pulled from the clinical item tabs in My Health.

Action Center

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

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

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

The provider might send you a form to provide updated health information. In this scenario, an action item is displayed in Action Center and you can click on the forms attachment to open the
form. Complete the form from Action Center and click Submit on the form to send the form back to your provider.

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.
Note:
When you email, print, or fax your health record data from and appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

The message includes the content: This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.
Recent Activity

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

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

![Recent Activity](image)

Appointments

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

The Appointments section contains 3 tabs.

Upcoming

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

**Past**

This tab includes all past appointments.

**Other**

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

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

**Note:**
When you email, print, or fax your health record data from an appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

The message includes the content: *This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.*

Your provider can send you an Appointment Reminder message through your Inbox and include an attached form. The forms are used by your provider to collect information that they want before you arrive for your appointment. When you open the form from your Inbox, you can complete the form and click **Submit** to send the form back to your provider.

**Check-in for your appointment**

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

**Before you begin**

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

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

1. Sign in to the patient portal. 
   The **Home** tab is displayed.

2. Locate the appointment in the **Upcoming** tab and click **Check In**. 
   **Check In - Consent Form** opens.

   **Note:** The consent form step only opens the first time you use the check-in feature or when the consent form is expired. Your organization sets the expiration date for the consent form.

3. Complete the consent form if this your first time using remote check-in or if your consent form is expired.  
   If this appointment is for you, **Patient** is automatically selected. If you are an authorized individual and are checking in for a dependent, **Parent/Guardian/Other Legal Representative** is selected.

4. Select **eSignature consent**.
5. Select the signature type that you want to use.
   > **Type Signature**
     Use the keyboard to enter your signature in the box.
   > **Draw Signature**
     Hold down the left mouse button as you write your signature in the box.

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

7. Verify your basic, social, insurance policy, and responsible party information. 
   If you edit this information during check-in, a message is displayed to confirm that you want to send the changes to other connected organizations. Click **Yes** or **No**. 
   This information matches the information listed under **My Info > Demographics**, with the exception of the insurance information, which might or might not match the information in your patient portal account. 
   If you edit the information, changes are also made in **My Info > Demographics** and vice versa.

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

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

Results of this task
You have checked in for your appointment.
A confirmation email message is sent to your patient portal Inbox. If you signed the consent form, a copy is added to the Documents tab in My Health. If you submitted a co-payment, your payment is complete.

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

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

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

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

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

4. From **Location Preference**, select a location where you prefer your appointment.
You can select 1 or more locations. If you do not select a location, your organization assumes that you can be seen at any of the locations that are listed.

**Note:**
Location Preference is only displayed if the provider that you have chosen for the appointment has his or her appointment locations set and you have selected and appointment type of Other.
Selecting a location is not supported with the direct schedule workflow.

5. From **My Available Times**, select the check box preceding the day of week that you want the appointment.
6. Select a time and availability.
   You can select a date up to 1 year in advance, when requesting a non-direct appointment.
7. 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 \(\times\) next to the list item.

8. (Optional) Enter additional comments in **Comments**.
   You are limited to 250 characters.
9. 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.
10. Click **OK**.

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

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

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

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

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

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

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

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

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

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

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

![Available Appointments](image)

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

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

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

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

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

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

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

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

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

2. (Optional) To change the start or end address for directions, enter the new addresses in **Start** and **End** and click **Get Directions**.

You can automatically add the addresses by selecting **Use My Address** and **Use Appointment Address**.
A new map and directions are displayed.

3.  (Optional) To print the map and directions, select Directions and Map, and click Print. When you email, print, or fax your health record data from and appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

   The message includes the content: This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.

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

Reschedule an appointment
You can reschedule appointments on the Upcoming tab located in the Appointments section on the Home tab.

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

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

The organization and provider are automatically displayed based on the original appointment and cannot be changed.

3. From **When Do You Want the Appointment?**, select the check box preceding the day of week that you want the appointment.

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

5. 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.
6. From **Location Preference**, select a location where you prefer your appointment. You can select 1 or more locations. If you do not select a location, your organization assumes that you can be seen at any of the locations that are listed.

   **Note:**
   - **Location Preference** is only displayed if the provider that you have chosen for the appointment has his or her appointment locations set and you have selected an appointment type of **Other**.
   - Selecting a location is not supported with the direct schedule workflow.

7. 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.

8. Click **OK**.
   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.

**Results of this task**
You have rescheduled an appointment.

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

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

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

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

Results of this task
You have cancelled an appointment.

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

1. Click the Past tab or Other tab.
2. To view appointment details, click the appointment in the list.
   Appointment Information opens and the clinical details or documents associated with this appointment are displayed.
3. (Optional) To print the appointment details, click Print.
When you print your health record data from an appointment, the message that is displayed in the confirmation window now includes a statement to inform patients that transmitted health data is not encrypted.

Results of this task
You have viewed past or other appointments and printed the details.

Billing on the Home tab
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 by billing group, and Amount Due is updated with the first sign-in of the day.
To view your invoices or make a payment, click **Details**. The **Billing** tab is displayed with **Patient Responsibility** expanded.

**Single sign on**

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

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

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

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

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

- My Charts
- Health Journal
- Know My Health
- Blood Sugar

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

Attention: Device applications, such as Telcare, Withings, and iHealth®, are no longer connected to the patient portal through App Center. These applications and devices are available through Health Sources on the Home tab or from My Account > My Connections > With Devices and Apps through Health Sources.

When you open App Center, a message is displayed to inform you that the device connections are managed in My Connections. Click OK, I got it to remove the message.

Install applications

1. From App Center on the Home tab, click Add Apps. App Store opens.
2. Click Install for the application that you want add. The application automatically installs and is available in the browser.

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

If you click Uninstall, the application is automatically removed and does not display when you browse your applications.
What to do next

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

Manage a Health Journal entry

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

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

1. From the Home tab, click New under Health Journal. A journal entry opens.

2. Enter a title and notes for the journal entry.
3. Click Save.

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

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

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

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

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

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

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

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

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

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

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

My Charts

<table>
<thead>
<tr>
<th>Blood Pressure (Systolic / Remove Chart)</th>
<th>Weight (Remove Chart)</th>
<th>HEMOGLOBIN A1C (Remove Chart)</th>
</tr>
</thead>
<tbody>
<tr>
<td>140, 130, 120, 110, 100, 90, 80</td>
<td>195, 190, 185, 180</td>
<td>10, 9, 8, 7, 6</td>
</tr>
</tbody>
</table>

The chart expands.
2. (Optional) To print the chart, click **Print this Chart**.

3. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.

4. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.

5. Click the graph title to return the graph back to the thumbnail size.

6. To add a chart, click **Add a Chart**. **Add a Chart to your Charts Widget** opens.
7. Select the type of data that you want to include in the chart. 
   You can add any result type or vital sign that has more than 3 data points. You can also select 
   more than 1 item for a single chart. 
   **Chart Name** is automatically added by the application, based on the items that you selected.

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

**Enter a blood sugar reading**

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

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

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

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

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

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

7. Click **OK**.

**Results of this task**
You have entered a blood sugar reading. The reading is sent to **My Health > Results**.
Know My Health

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

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

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

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

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

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

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

Visit product website

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

Supported products and services

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

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

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

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

Results of this task
You have accessed Health Sources.

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

Access Health Sources on the Home tab

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

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

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

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

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

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

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

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

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

1. From the Home tab, click My Health. My Health opens.
2. Click the Goals tab. Goals opens.
3. Expand Active Goals.

4. From an active goal, click Health Sources. My Connections opens and With Devices and Apps through Health Sources expands.
Results of this task
You have accessed Health Sources.

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

Connect to health sources
You can add and remove connections for health sources.

Refer to the instructions for each health source that is supported by FollowMyHealth to connect the health source.
View available health sources from **Available Health Sources**. The number of health sources is displayed next to the **Available Health Sources** label.

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

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

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

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

**Before you begin**

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

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

**Results of this task**

The iHealth® health source is connected to FollowMyHealth.

The iHealth® health source is now listed under Your Connected Health Sources.

---

**Connect a Telcare health source**

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

**Before you begin**

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

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

5. Follow the steps provided by the Telcare web page to connect your blood glucose meter.

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

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

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

1. From the patient portal, click My Account > My Connections. My Connections opens.

2. Click the With Devices and Apps through Health Sources tab. The With Devices and Apps through Health Sources is displayed and you can view your connected health sources and available health sources.

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Device</th>
<th>Features</th>
<th>FollowMyHealth integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>iHealth Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled, Measures blood pressure, Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled, Measures blood pressure, Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled, Measures blood pressure, Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Blood Pressure Dock</td>
<td>Connects to iPhone®, iPad®, and iPod®, Measures blood pressure, Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Wireless Body Analysis Scale</td>
<td>Wi-Fi-enabled, Measures weight, body fat, body water, visceral fat, body muscle mass, and bone mass</td>
<td>Weight and BMI readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Wireless Scale</td>
<td>Bluetooth-enabled, Measures weight</td>
<td>Weight and BMI readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs Wireless Smart Gluco-Monitoring System</td>
<td>Bluetooth-enabled, Measures blood glucose</td>
<td>Blood glucose readings imported into FollowMyHealth</td>
</tr>
<tr>
<td>iHealth Labs iHealth Align</td>
<td>Attach to Android™ or Apple®, Measures blood glucose</td>
<td>Blood glucose readings imported into FollowMyHealth</td>
</tr>
<tr>
<td>Device</td>
<td>Features</td>
<td>FollowMyHealth integration</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>Withings Smart Body Analyzer</td>
<td>Bluetooth and Wi-Fi-enabled</td>
<td>Weight readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td></td>
<td>Measures weight</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calculates BMI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calculates body fat percentage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Measures pulse</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monitors ambient temperature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monitors ambient CO2 levels</td>
<td></td>
</tr>
<tr>
<td>Withings Wireless Scale</td>
<td>Bluetooth and Wi-Fi-enabled</td>
<td>Weight readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td></td>
<td>Measures weight</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Calculates BMI</td>
<td></td>
</tr>
<tr>
<td>Withings Wireless Blood Pressure Monitor</td>
<td>Bluetooth-enabled</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td></td>
<td>Measures blood pressure</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Measures pulse</td>
<td></td>
</tr>
<tr>
<td>Telcare Blood Glucose Meter</td>
<td>Uses a cellular phone connection</td>
<td>Blood glucose readings are imported into FollowMyHealth</td>
</tr>
<tr>
<td></td>
<td>Measures blood glucose</td>
<td></td>
</tr>
</tbody>
</table>

**iHealth® Labs Wireless Blood Pressure Wrist Monitor**

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

**iHealth® Labs Wireless Blood Pressure Wrist Monitor**

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/

**iHealth® Labs Wireless Blood Pressure Monitor**

http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-monitor/

**iHealth® Labs Blood Pressure Dock**

http://www.ihealthlabs.com/support/blood-pressure-monitors/blood-pressure-dock/

**iHealth® Labs Wireless Body Analysis Scale**

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

iHealth® Labs Wireless Smart Gluco-Monitoring System

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

Withings Smart Body Analyzer

Withings Wireless Scale

Withings Wireless Blood Pressure Monitor

Telcare Blood Glucose Meter
http://www.telcare.com/

Get Treated Now
The Get Treated Now section is only available on the Home tab if your organization has the on-demand video visit or the eMail visit feature enabled.

If your organization has these Telehealth features turned on and Get Treated Now is displayed on your Home tab, you can talk to a doctor in either of the following ways.

> Click Start a Video Visit
> Click Start an Email Visit
Refer to the sections "On-demand video visits" and "eMail visits" for more information about these offerings.
Chapter 7

On-demand video visits

An on-demand video visit is real-time clinical consultation with a provider through a video conference.

You can participate in a video visit with a provider in your healthcare organization when you click **Start a Video Visit** from the **Get Treated Now** section on your patient portal **Home** tab.

The video visit process includes reviewing estimated wait times and organizations available, selecting from a list of reasons for the visit, adding symptom information, and waiting in the virtual waiting room until a provider connects to the video consultation.

You must have a connection with an organization that supports video visits. If your organization does not support video visits, the **Get Treated Now** section is not displayed.

If the provider that you connected with in the video visit supports payment features, you can pay for your video visit at the time of the service.

If the healthcare organization that your provider belongs to has enabled support for attachments, you can share attachments with the provider during the video visit.

**Note:** You must have an Internet Explorer v10 or later to use video visit.

**Prerequisites for on-demand video visits**

**Supported browsers**

> Google Chrome™
> Microsoft® Internet Explorer® 10.0 and later. Refer to the information under "Video client plug-in" for information about the requirement to download a one-time executable file.
> Apple® Safari®. Refer to the information under "Video client plug-in" for information about the requirement to download a one-time executable file.

**System requirements**

> Microsoft® Windows® 7.0 or later
> Apple® Mac® OS X 10.0 or later
> Recommended camera peripherals: Logitech™ Pro Webcam C920 or Logitech™ Pro Webcam C930e for PC or Mac
> Recommended audio peripherals: PC Webcam microphone or internal audio for Mac
Video client Plug-in
If you are using Microsoft® Internet Explorer® or Apple® Safari®, you must download the video client plug-in before you can start an on-demand video visit.

When the video window is displayed for the first time, you are prompted to download the plug-in executable. You need to install a plug-in to have a Virtual Visit is displayed in the video window. Click Download plug-in. The plug-in is downloaded to your Downloads folder on your personal computer. Go to your Downloads folder and install the plug-in.

After the installation is complete, go back to the video visit video window and click Refresh Page. The video window is displayed and you can see the provider’s video window and your preview video window.

If you are using the Mozilla Firefox® or Google Chrome™ browser, the plug-in is not required and you are not prompted to download the plug-in.

When there are software updates available for the video client plug-in, a message is displayed on the video window before you can proceed with the video visit. Download the plug-in update and restart your Internet browser before continuing with the video visit.

Microphone and camera
All browsers require that you share your computer microphone and camera. The first time that you access the video window, the browser prompts you to confirm that you are sharing the microphone and camera. The available peripherals are displayed as options. Select Always Share so that you are not prompted the next time you start an on-demand video visit.

Start an on-demand video visit
On-demand video visits are a convenient alternative to travelling to your healthcare organization for a visit with a provider. You can consult with a provider from a remote location using a desktop computer or tablet through your patient portal account.

Before you begin
Ensure that you have the video client plug-in installed and are sharing your camera and microphone peripherals.

1. Open your patient portal.
2. From Home > Get Treated Now, click Start a Video Visit. Request a Video Visit is displayed.
The organizations that are available for an on-demand video visit are displayed with available office hours under Video Visit Practices.

The estimated wait time is displayed next to the organization.

3. Click Select next to the organization that you want to have a visit with. Select a Reason for your Visit is displayed.

4. Click Select reason to display a list of symptoms.
Chapter 7 On-demand video visits

A list of symptoms is displayed.

5. Select your symptom from the drop-down list. When the video visit is started and the video window is displayed, the reason for your visit is displayed in the right pane under **Summary**.

**Select a Reason for your Visit**

- Select a reason for your visit

- Earache

**Information about your visit**

6. (Optional) Enter information about your issue in **Information about your visit**, if you have additional information that you want your provider to know. **File Upload** is displayed.

7. (Optional) To add attachments, click **Click here to add an attachment** in **Would you like to attach any files**. This step is an optional feature. The **Would you like to attach any files** box is not displayed unless your provider has the attachments option enabled.
**File Upload** is displayed.

8. Attach files that are related to your condition that you want your provider to review. You can attach files in either of the following ways.
   - Drag and drop files from a folder on your computer into **File Upload**.
   - Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to 5 files in **JPG**, **JPEG**, or **PNG** file format. The maximum file size is 8MB. After a file is uploaded, it is displayed with a thumbnail view on **Other Information**. Upon completing the video visit, the file is accessible to the provider through the video visit message template.

9. Click **Next**.

Your demographic information is displayed.

10. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.

When the video visit is started and the video window is displayed, this information is displayed in the right pane. Ensure that you provide the preferred phone number and pharmacy so that your healthcare provider can contact you or send a prescription promptly after the video visit, if needed.
11. If you change your demographic information and want to share the change with all other organizations that you are connected with, select **Would you like to send this change to all of your connected organizations**.

12. Click **Go To Payment Page** or **Go To Virtual Waitroom**, depending on the following scenarios. The **Go To Payment Page** button is displayed if your organization has enabled the on-demand video visit payment feature. The **Go To Virtual Waitroom** button is displayed instead of the
Go To Payment Page button if your organization has not enabled the on-demand video visit payment feature.

Figure 2: Payment feature enabled: Go To Payment Page is available
Your provider has the payment feature enabled and you can now make a payment. Click Go To Payment Page.
The payment page is displayed.
Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.

<table>
<thead>
<tr>
<th>Invoice</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
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<td>$20.01</td>
</tr>
</tbody>
</table>

Receipt Number: 033-0012170241  
Authorization Code: 
Current Date: 03/06/2017 3:22 PM  
Account Id: ECBAdele
After your payment is processed, a summary of your payment is displayed.

Your payment has been processed.

Total Amount: $20.01
Transaction ID: 20170306 985f762e-9b61-4b04-8d20-b6b7ac09f580
Confirmation Number: 033-0012165779
Receipt Text: Thank you for your Virtual Visit payment. Have a nice day! Testing
A confirmation email has been sent to your inbox.

Visits available: 7:00 AM to 9:00 AM; 9:15 AM to 10:45 PM
Estimated wait time: 0 min

Continue to step 10.

> Your provider does not have the payment feature enabled and you cannot make a payment at this time. Continue to step 10.

13. Click Go to Virtual Waitroom. Virtual Waitroom is displayed.
You are now in the virtual waiting room and you are an active patient in the provider's patient queue. The reason for your visit, the organization the visit is with, and the approximate time that your visit starts are shown.

Your provider can send a notification to update you on the wait time. A notification is displayed on Virtual Waitroom or sent to you through email or text.

When the provider selects you in the queue, your on-demand video visit automatically begins. The video window opens and the provider is available.

The reason for your visit and additional information that you entered during the video visit process are displayed in the right pane under Summary. Your preferred phone number and pharmacy are also displayed in the right pane.
14. (Optional) Leave the video session.
   If you want to leave the visit during the session, you can rejoin the same session.
   Click **Leave** to close video window. The video session closes.
   If you want to return, click **Video Visit in Progress – Reconnect** on the **Home** tab under **Get Treated Now** and the session reconnects.

   ![](image)

   The video screen reopens and you can continue with the video visit.

15. Click **End** to end the on-demand video visit.

16. (Optional) Plan your follow-up visit and if you requested that the provider send you a visit summary through email, check your **Inbox** tab to view the visit summary.

**Results of this task**
You have completed an on-demand video visit with a provider and reviewed your visit summary.
Chapter 8

eMail visits

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

The following are eMail visit requirements and features.

> You must have a connection with a provider that supports the eMail visits feature.
> If your provider supports attachments, you can attach images to the eMail visit.
> If your provider has the eMail visit feature, you can start an eMail visit from your patient patient portal account in either of the following ways:

— From My Account > My Connections > With Providers and Healthcare Organizations > Provider > What do you want to do > Request an Email Visit
— On the Home tab from Get Treated Now > Start an Email Visit

> Your symptoms must be qualified during the eMail visit. If your symptoms are too severe, the eMail visit process stops and you are asked to see the provider at his or her office, or seek emergency medical attention.
> A flat fee might be charged by your provider and is paid when requesting your eMail visit.
> All responses to your eMail visit are sent to the Inbox tab in the patient portal.

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

Request an eMail visit from the Home tab

You can request an eMail visit from the Get Treated Now section on your patient portal Home tab. If the payment feature is enabled for your provider, you can also make a payment during this process.

1. Open your patient portal account.
2. From Home > Get Treated Now, click Start an Email Visit. Request an Email Visit - Start is displayed.
3. From Provider, select who you want to have an eMail visit with.

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

   Emergency Message Disclaimer is displayed.

4. Click **Next**.
   Terms of Service is displayed.
5. Read the terms of service, select **I understand and accept the Terms of Service**, and click **Next**. **Select Your Symptom** is displayed.

6. Click **Symptom** to display a list of symptoms. If you do not see the symptoms that you are experiencing, you can click **Can't find your symptom > Make an In-Person Appointment**. The eMail visit workflow ends and **Schedule and Appointment** is displayed.
7. Select your symptom from the drop-down list and click Next. Qualify is displayed. The reason for the eMail visit is displayed at the top of the window.
8. **Read the symptoms and select Y or N.**
   > If you are experiencing any of the conditions or symptoms listed, click **Y** (yes).
   > A message is displayed that confirms that you have a symptom that is outside the guidelines for treatment through an eMail visit.

   ![Attention](image)

   Click **OK**. The eMail visit workflow ends.

   > If you are not experiencing any of the symptoms listed, click **N** (no) and click **Next**. **Chief Complaint** is displayed.
9. Answer the questions about your symptoms and click **Next**. **Other Information** is displayed.

10. Enter information in the box that you want your provider to know and click **Next**.
File Upload is displayed.

**Note:** This step is an optional feature. The File Load window is not displayed unless your provider has the attachments option enabled.

11. Attach files that are related to your condition that you want your provider to review. You can attach files in either of the following ways.
   > Drag and drop files from a folder on your computer into File Upload.
   > Click Click here to attach a file to browse and select files from a folder on your computer.

You can add up to 5 files in JPG, JPEG, or PNG file format. The maximum file size is 8MB. After a file is uploaded, it is displayed with a thumbnail view on Other Information. Upon completing the eMail visit, the file is accessible to the provider through the eMail visit message template.

12. Click Next. Confirm Patient Information is displayed.
13. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.

14. Click **Next** or **Send**, depending on the following scenarios.
**Next** is displayed in **Confirm Patient Information** if your provider has enabled the eMail visit payment feature. **Send** is displayed instead of **Next** if the provider has not enabled the eMail visit payment feature.

**Figure 4: Payment feature enabled: Send is available**

![Image of the eMail visit payment feature](image)
Figure 5: Payment feature not enabled: Send is available

Your provider does not have the payment feature enabled and you cannot make a payment at this time. Click Send. Summary is displayed.
A message is displayed that indicates that your eMail visit is submitted to your provider. Go to step 15 to finish the eMail visit.

> **Your provider has the payment feature enabled and you can now make a payment.** Click **Next**. **Payment** is displayed.

Click **Go to Payment Page**. The payment page is displayed.
Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.
Request an eMail visit from the Home tab

Thank you for your Email Visit Payment! Have a nice day!

<table>
<thead>
<tr>
<th>Invoice</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>$15.15</td>
</tr>
</tbody>
</table>

Receipt Number: 60018095608
Authorization Code:
Current Date: 02/15/2017 1:47 PM

After your payment is processed, **Summary** is displayed.

Go to step 15 to finish the eMail visit.

15. Click **Complete**.
The eMail visit workflow closes.
Results of this task

Your eMail visit request is sent to the provider. You can view the sent message from your Sent folder in the Inbox tab. The message content is a summary of the eMail visit request.

The provider receives the eMail visit request, reviews your symptoms, creates a care plan, and responds to the eMail visit request. The message is sent to your Inbox tab and you can retrieve your care plan. Your health record is also updated with the eMail visit information. A receipt is also sent through an email message to your Inbox tab.

Request an eMail visit from My Connections

You can request an eMail visit from the provider connections list on your patient portal My Connections tab. If the payment feature is enabled for your provider, you can also make a payment during this process.

1. Open your patient portal account.
2. From the Home tab, click My Account > My Connections.
3. My Connections is displayed.
4. Expand With Providers and Healthcare Organizations. Providers who you are connected to are displayed.
5. From a provider, click What do you want to do > Request an Email Visit.
Note: If your provider does not have Request an Email Visit listed, he or she does not have the eMail visit feature enabled.

Emergency Message Disclaimer is displayed.

6. Click Next.  
Request an Email Visit - Start is displayed.  
The provider name is displayed in Provider.
7. Read the terms of service, select **I understand and accept the Terms of Service**, and click **Next**.
   **Select Your Symptom** is displayed.

8. Click **Symptom** to display a list of symptoms.
   If you do not see the symptoms that you are experiencing, you can click **Can't find your symptom > Make an In-Person Appointment**. The eMail visit workflow ends and **Schedule and Appointment** is displayed.
9. Select your symptom from the drop-down list and click **Next**. 

**Qualify** is displayed. The reason for the eMail visit that you selected is displayed at the top of the window.
10. Read the symptoms and conditions and select Y or N, depending on the following scenarios.

> If you are experiencing any of the conditions or symptoms listed, click Y (yes).
   A message is displayed that confirms that you have a condition or symptom that is outside the guidelines for treatment through an eMail visit.

   ![Attention message]

   Click OK.
   The eMail visit workflow ends.

> If you are not experiencing any of the symptoms or conditions listed, click N (no), and click Next.
   Chief Complaint is displayed.
11. Answer the questions about your symptoms and click **Next**. **Other Information** is displayed.

12. Enter information in the box that you want your provider to know and click **Next**.
13. Attach files that are related to your condition that you want your provider to review. You can attach files in either of the following ways.

> Drag and drop files from a folder on your computer into Attachment Viewer.
> Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to 5 files in JPG, JPEG, or PNG file format. The maximum file size is 8MB. After a file is uploaded, it is displayed with a thumbnail view on **Other Information**. Upon completing the eMail visit, the file is accessible to the provider through the eMail visit message template.

14. Click **Next**.
**Confirm Patient Information** is displayed.

15. Review your demographic and pharmacy information to confirm that the information is correct and make changes if necessary.

16. Click **Next** or **Send**, depending on the following scenarios.
Next is displayed in Confirm Patient Information if your provider has enabled the eMail visit payment feature. Send is displayed instead of the Next button if the provider has not enabled the eMail visit payment feature.

**Figure 6: Payment feature enabled: Send is available**
Figure 7: Payment feature not enabled: Send is available

> Your provider does not have the payment feature enabled and you cannot make a payment at this time. Click Send. Summary is displayed.
A message is displayed that indicates that your eMail visit is submitted to your provider.

Go to step 17 to complete the eMail visit.

> **Your provider has the payment feature enabled and you can now make a payment.** Click Next. **Payment** is displayed.

Click **Go to Payment Page**. The payment page is displayed.
Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.
After your payment is processed, **Summary** is displayed.

### Summary

Your Payment has been processed and your email visit request has been sent

- **Billing Information**
  - Provider: [Redacted]
  - Chief Complaint: Earache
  - Total Amount: $15.15
  - Transaction ID: 20170215-7bac3453-f20d-445e-a50a-a71b00e356cc
  - Confirmation Number: 60018095608

A confirmation email has been sent to your FMI Inbox.

---

Thank you for your eVisit. Have a nice day!

---

Go to step 17 to complete the eMail visit.

17. Click **Complete**.

The eMail visit workflow closes.
Chapter 8 eMail visits

**Results of this task**

Your eMail visit request is sent to the provider. You can view the sent message from your **Sent** folder in **Inbox**. The message content is a summary of the eMail visit request.

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

A receipt is also sent through an eMail message to your **Inbox** tab.
Chapter 9

Inbox

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

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

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

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

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

Compose email messages

Create and send email messages to communicate with your healthcare provider.

**Important:** If your healthcare organization has enabled attachments, you can send your provider attachments, such as forms. 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? after you click Send.

1. From the patient portal Home tab, click the Inbox tab. Inbox opens.
Chapter 9 Inbox

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

3. Click OK.
Compose Email opens.

4. For To, enter the email recipient.

5. For Subject, enter the reason for your email message.

6. (Optional) Add an attachment.

   Note: You can add attachments only if your healthcare organization
   has this feature enabled. The Attachments box is not displayed if
   your healthcare organization does not support attachments.

   a) Click Click here to attach a file in Attachments.
   b) Browse for the file that you want to attach.
   c) Select the file.
      You can add up to 5 files, up to 25MB per file. You can upload JPG, JPEG and PNG file
types.
      The file that you selected is displayed in the Attachments.
      If you want to remove the attachment, click the delete icon on the attachment image.

7. Click Send.
If you are emailing a form, a window opens to inform you that you cannot change the form
after it is emailed. Click Send.
Message opens with Email Sent displayed.

8. Click OK.

Create and edit Inbox folders

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

2. Click Add Folder.
Create New Folder opens.

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

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

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

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

7. Click **Done**.
Chapter 10

My Health

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

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

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

**Note:** The health data that you email, print, or fax from the My Health tabs is not encrypted. The following message is displayed to remind you:

This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.

Summary

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

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

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

Demographics

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

My Care Team

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

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

**Surgical History**

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

**Allergies**

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

**Medications**

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

**Recent Vitals**

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

**Manage your care team list**

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

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

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

1. From the patient portal **Home** tab, click **My Health**. The **My Health** tab is displayed.
2. From **My Health**, click the **Summary** tab. The **Summary** tab is displayed.
3. Click **Add Provider**. **Add Preferred Provider** opens.
4. Enter the provider's name, information that distinguishes the provider from other providers, and the contact information.

5. Click **Save**. The provider is listed in **My Care Team**.

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

7. Click **Yes**.

8. To edit the provider information, click 📝. **Add Preferred Provider** opens.

9. Edit the information and click **Save**.

**Import clinical summary documents**

You can import a clinical summary document to FollowMyHealth.

You can add any HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD) or clinical summary document, to your healthcare record. These documents are provided by most healthcare organizations and can often be exported from personal health records and patient portals.

1. From the patient portal **Home** tab, click **My Health**. The **My Health** tab is displayed.

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

3. Click **Import**. **Import Clinical Document** opens.

4. From **Choose File**, browse for the file that you want to import.

5. Click **Import**.

**Results of this task**

Your document is imported.

When you import a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.
Download clinical summary documents

You can download (export) your clinical summary documents.

Documents are exported as an HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD). You can save this file to your hard drive or external storage device such as a USB drive.

1. From the patient portal Home tab, click My Health. The My Health tab is displayed.
2. From My Health, click the Summary tab. The Summary tab is displayed.
4. Select Download to this computer or an external storage device (e.g. USB Drive) and click Continue. Download Clinical Document opens.
   You can select a document from the right pane or narrow the results in the right pane by filtering your documents under Filter by Date.
5. Search for the document that you want to export by filtering by date.
   > Select Specific Date to search for a document from a specific date. Click the blank box to open the calendar tool. Enter the date from the calendar tool. Click Apply.
   > Select Date Range to search for a document from a range of dates. Click the blank box to open the calendar tool. Enter a date range. Click Apply.
   The documents that match the filter results are displayed in the right pane.
6. Select Select All to select all documents that are listed in the right pane or select a single document to export. The files are packaged in a .zip file.
7. Click Download and select a file or document type.
   > To download your health record as a document, select Download as a Document (HTML).
   > To download a clinical summary document, select Download as a CCD (XML) file.
   A message is displayed that asks if you want to open or save the document.
8. Save the file or document to your local drive.

Results of this task
Your document is exported.
When you download a clinical summary document, the history is logged at My Account > Preferences > Activity History Log.

Email clinical summary documents

You can email your clinical summary documents to your provider or other interested party.

Documents are transmitted as an HL7 Clinical Document Architecture-compliant XML file, such as a continuity of care document (CCD). When you email your information, you can encrypt and password-protect the electronic message, but you must share the password with the recipient or they cannot open the file.

1. From the patient portal Home tab, click My Health. The My Health tab is displayed.
2. From My Health, click the Summary tab. The Summary tab is displayed.
4. Select Transmit via email and click Continue. Email Clinical Document opens.
5. Search for the document that you want to export by filtering by date.
   > Select Specific Date to search for a document from a specific date. Click the blank box to open the calendar tool. Enter the date from the calendar tool. Click Apply.
   > Select Date Range to search for a document from a range of dates. Click the blank box to open the calendar tool. Enter a date range. Click Apply.
   The documents that match the filter results are displayed in the right pane.
6. Select Select All to select all documents that are listed in the right pane or select a single document to export. The files are packaged in a .zip file.
7. Enter the email address that you want to send your information to.
8. (Optional) To password-protect your email message, select Encrypt and enter a password for Password.
   Note: If you want to encrypt your email message, you must share this password with the recipient so that he or she can access the message.
9. Click Send. Your email has been sent opens.
10. Click **OK**.

**Results of this task**
Your clinical summary document is sent through email.

When you transmit a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

**Conditions in your health account**

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

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

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

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

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

**Add an active condition**

Active conditions are health conditions that are ongoing problems.

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

2. For **Type**, select **Health Condition**.

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

4. For **Status**, select **Active**.
If a provider entered a resolved condition, select **Resolved** for **Status**. You must then enter a date when the issue was resolved.

If a provider entered a condition that is not applicable, select **Denied**. Items that are resolved are displayed in the **Past Medical History** section.
5. For **Comments**, enter related comments.
6. Click **Save**.
   *Confirm Add* opens.
7. Click **Yes**.
   The condition is listed under **Active**.

### Add a surgical history condition

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

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

**Resolved**

- Specifies that this is a past surgery.

**Denied**

- Specifies that you did not have this surgery.

5. For **Procedure Date**, enter the date of the surgery.
6. For **Provider**, enter the name of the provider that performed the surgery.
7. For **Comments**, enter related comments.
8. Click **Save**.
   *Confirm Add* opens.
9. Click **Yes**.
   A surgical history is added.
Add a family health condition

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

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

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

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

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

   **Denied**
   
   Specifies a condition that you do not want included in your family history.

5. Enter the relationship of the family member in Relationship.
6. Enter related comments in Comments.
7. Click Save.
   
   If you are an authorized individual, Family Health Condition opens. The patients that you are an authorized individual for are displayed in the window. Select family members that the health condition also applies to.

8. For Comments, enter related comments.
9. Click Save.
   
   Confirm Add opens.
10. Click Yes.
   The condition is listed under Family Health Conditions for you and the family members that you are an authorized individual for.

**Add a personal health condition**

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

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

2. For Type, select Personal Health Condition.

3. For Name, type the name of the condition
   When you enter the name, a list of conditions is displayed. You can select 1 of these conditions, or enter your own.

4. For Status, select Active.

**Active**

Specifies an issue that is currently active.

**Resolved**

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

**Denied**

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

5. For Comments, enter related comments.

6. Click Save.
   Confirm Add opens.

7. Click Yes.
   The condition is listed in Conditions.
Medications

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

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

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

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

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

Add a medication

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

Active

Specifies a medication that you are currently taking.

Complete

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

Discontinued

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

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

Declined

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

On Hold

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

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

Add a pharmacy

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

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

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

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

The following features apply to providers that receive prescription refills:

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

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

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

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

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

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

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

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

**Allergies tab**

The **Allergies** tab in the FollowMyHealth lists all active, resolved, denied, and inactive allergies. From the **Allergies** tab on **My Health**, you can add, delete, and edit allergies.

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

**Add an allergy**

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

   **Medication**
   
   Specifies that you have an allergy to a medication.

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

   **Food**
   
   Specifies that you have an allergy to certain food types.

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

3. For **Name**, enter the name of the allergy.
   When you enter the name, a list of allergies is displayed. You can select 1 of these allergies, or enter your own.
4. From **Status**, select the status that applies to the allergy.

**Active**

Specifies an active allergy or an allergy you currently have.

**Inactive**

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

**Resolved**

Specifies an allergy that you no longer have.

**Denied**

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

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

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

The reaction is displayed in **Allergic Reactions**.

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

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

9. Click **Yes**. 
The allergy is listed in **Allergies**.

## Immunizations

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

Immunizations are categorized by status, including Received, Declined, Unknown, and OnHold. The **Show** menu is a drop-down menu that you can use to filter the immunizations by status. You can select multiple status types so that all Received, Declined, Unknown, and On Hold immunizations are displayed. The **Show** menu is not available if you do not have immunizations recorded in your health record. Only statuses for which you have at least 1 immunization are
available to select. For example, if you do not have any immunizations of Unknown status, then Unknown status check box is not available to select.

Immunizations are grouped by their series. Only the immunizations’ series for which you have received at least 1 immunization are displayed. Immunization records within a series are displayed in a descending order by Date. For example, the latest immunization is displayed first. If you have more than 3 immunization records applicable to Influenza (Flu) series or are a patient between ages 19 and 64, and have more than 3 immunization records applicable to Pneumococcal series, then the immunizations in the series are collapsed and the last 3 immunizations are displayed.

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

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

### Add an immunization

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

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

Specifies an immunization that you have received.

OnHold

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

Declined

Specifies an immunization that you were offered that you declined.

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

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

10. Click Save.
    Confirm Add opens.

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

View immunization details

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

2. Click the Immunizations tab.
   Immunizations opens.

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

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

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

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

You can view the following immunization schedule types.

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

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

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

View vaccine information sheets

1. From the Home tab, click the My Health tab. My Health opens.
2. Click the Immunizations tab. Immunizations opens.
3. Point the mouse pointer to the immunization that you want to view.
The InfoButton™ education icon (ℹ️) is displayed.

4. Click 🔄.
   Vaccination Information opens.

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

What to do next
Save or print the vaccination sheet.

Share your immunization record

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

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

2. Click the Immunizations tab.
   Immunizations opens.

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

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

Note: The health data that you email, print, or fax from the My Health tabs is not encrypted. The following message is displayed to remind you: This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.

Results of this task

You have emailed, printed, or faxed your immunization record.
Vital signs

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

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

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

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

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

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

Add a vital sign

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

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

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

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

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

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

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

Add a result

1. From the Results tab on My Health, click Add Result. Add Result opens.
2. From Name, enter the name of the result. When you enter the name, a list of test results is displayed. You can select 1 of these results or enter your own.
3. For Result Date, enter the date that you learned the results.
4. For Value, enter the actual result.
5. For Provider, enter the provider who ordered the test.
6. For Units, enter the units from the test result.
   For example, enter mmHg for blood pressure.
7. For Comments, enter related comments.
8. Click Save. Confirm Add opens.
9. Click Yes.
   The result is listed under result type.
Graph results

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

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

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

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

View results

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

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

   Results that are numerical are contained in the Range column, with a visual representation of where the values lie within a range (low, normal, and high). Range information is provided only if the provider sent this information with your results.
The **Range** column is empty for text-based results that are non-numeric, such as for pathology and radiology.

Most numeric results from your provider have an associated reference range of normal values. You can view the range by pointing to the graphic in the **Range** column or by printing the result.

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

2. To view text-based results, click 📞. The result detail window opens.

**Results of this task**
You have viewed the details of your results.

**What to do next**
Print your results.

**Note:** You can only print from details if the result is sent to the patient portal from the organization. You cannot print patient-entered results from the details window. The health data that you print is not encrypted. The following message is displayed to remind you: This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.
Documents

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

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

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

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

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

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

The health data that you print is not encrypted. The following message is displayed to remind you:
This transmission is unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab to send via encrypted Email.

Add a document

You can upload .jpeg, .png, .txt, and .pdf document file types.

If you try to upload a document type that is not supported, a warning message is displayed.

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

1. From the Documents tab on My Health, click Add Document.
   Add Document opens.

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

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

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

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

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

Note: The health data that you print is not encrypted. The following message is displayed to remind you: This transmission is
unencrypted. If you wish to encrypt please use the "Export" option from the My Health > Summary tab
to send via encrypted Email.
**Goals**

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

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

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

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

Goals are organized by status.

**New**

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

**Active**

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

**Completed**

Completed goals are listed under **Completed Goals**. The goal is completed automatically when the goal is reached or the end date has passed. Final results are sent to the electronic health record (EHR) application and the provider can view the results. Notifications are no longer triggered and readings are no longer captured for completed goals.
Declined

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

Cancelled

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

Goal types

Weight management goal

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

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

- Readings are entered manually or with a compatible wireless scale. The compatible device automatically send the readings to the patient portal.
- Only weights from your compatible devices or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading, body mass index (BMI), and patient-entered comments.
- The progress is displayed as follows:
  - The first reading on the goal is used to calculate the target weight based on the weight set in the goal. The goal start and end dates are displayed in the header.
  - **Last Reading** specifies the last weight reading and the current BMI.
  - **Target Weight** specifies the target weight.
    - The target weight is the green horizontal line.
    - The initial weight is the red horizontal line.
    - The blue line is the weighted average of all the readings and displays how the patient is trending.
  - The progress indicator shows your progress towards reaching your goal. It indicates how much your weight has changed and the percentage of the goal completed.
The compatible devices are set up in **Health Sources**.

You can connect to your wireless scale from a weight management goal in the **Goals** tab.

Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

**Figure 8: Weight management data in table format**

![Weight management data in table format](image)

**Figure 9: Weight management data in graph format**

![Weight management data in graph format](image)
Monitor weight goal

The monitor weight goal is used to monitor weight changes in patients with congestive heart failure.

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

- Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the patient portal.
- Only weights from your compatible device or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading, body mass index (BMI), patient-entered comments, and any broken rules.
- The compatible devices are set up through Health Sources.
- You can connect to your compatible device from a monitor weight goal on the Goals tab.
Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

**Figure 10: Monitor weight data in graph format**

![Monitor weight data in graph format](image)

**Figure 11: Monitor weight data in table format**

![Monitor weight data in table format](image)

**Monitor blood glucose goal**

The monitor blood glucose goal is used to monitor blood glucose levels for patients with diabetes. The following list includes best practices when managing your monitor blood glucose goals.
Readings are entered manually from the goal or electronically with a compatible device that automatically sends the reading to patient portal.

The graph data point tooltip includes the reading, date, time, tag, patient-entered comments, and any broken rules.

The compatible devices are set up through Health Sources.

You can connect to your compatible devices from a goal in the Goals tab.
> If a blood glucose reading is added to the **Results** tab in **My Health** and the reading date is within the goal period, the reading is also added to the **Goals** tab.

**Figure 12: Monitor blood glucose data in graph format**
Figure 13: 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 compatible device. The device automatically sends the reading to the patient portal.
- The graph data point tooltip includes the value, date, time, patient-entered comments, and any broken rules.
- The compatible devices are set up through Health Sources.
- You can connect to your compatible devices from a blood pressure goal in the Goals tab.
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 14: Monitor blood pressure data in graph format**

![Graph showing blood pressure data](image)

**Figure 15: Monitor blood pressure data in table format**

<table>
<thead>
<tr>
<th>Date</th>
<th>Blood Pressure</th>
<th>Comments</th>
<th>Source</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/3/2014 1:32 PM</td>
<td>117 / 70 mmHg</td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/3/2014 1:31 PM</td>
<td>119 / 70 mmHg</td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/2/2014 1:31 PM</td>
<td>119 / 77 mmHg</td>
<td></td>
<td>Patient Entered</td>
<td></td>
</tr>
<tr>
<td>9/2/2014 1:29 PM</td>
<td>123 / 85 mmHg</td>
<td>Odor</td>
<td>Patient Entered</td>
<td></td>
</tr>
</tbody>
</table>

**Manage your goals**

**View goals and readings**

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

**Before you begin**

You must have at least 1 goal for the Goals tab to display. The number of unaccepted goals is displayed on the Goals tab until you accept or decline the new goals.
Click My Health > Goals. Alternatively, you can click the goal notification in Action Center to access the Goals tab. The Goals tab is displayed.

There are 5 different states for a goal, new, active, completed, declined, or cancelled. New goals must be accepted. Click Click here to accept the goal and begin collecting measurements. Click on a goal section header to see the goals in that state.

Figure 16: Goals tab

![Goals tab image]

Figure 17: Goal readings

![Goal readings image]

To change the goal display, click Graph or Table. You can switch between Graph and Table views.

To edit a reading from the table view, click .

To remove a reading on the table view, click . The reading is removed from your universal health record (UHR) and no longer is displayed on the goal.

To restore a reading, go to My Account > Preferences > Restore Deleted Items.
Accept a new goal

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

1. Open the Goals tab in either of the following ways.
   > Click My Health > Goals.
   > Click the new goal notification on Action Center.
   The Goals tab is displayed.

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

3. (Optional) Select the preferred communication method that you want receive your reminder from.
   > Select Email to get your reminder through an email message. Click Change if you want to update your email address. Email is the default communication method.
   > Select Text Message to get your reminder through a text message. Click Change or Remove if you want to add an alternative cell phone number. This method can only be used if the cell phone number is verified.

   If Email or Text Message are not selected in My Reminders when Continue is clicked, default reminders are not created.

   If Email or Text Message is selected in My Reminders when Continue is clicked, the default reminders are created.

   Note: The goals are not accepted or processed until Continue is clicked on My Reminders.

4. Select Accept for the goals that you want to accept.
If you accept multiple goals of the same type, **Duplicate Goals** opens.

**Figure 18: Duplicate Goals**

The message lists the duplicate goals and you must select the goal that you want to follow and click **Continue**. The goals that you do not select are declined.

5. Click **Continue**.
   The default reminder created by the application is listed. You can accept, edit, or delete the reminder. The accepted reminders are displayed in the table on **My Reminders** in alphabetical order.

6. Click **Continue** to continue to accept the default goal reminder and the goal.
   The **Active Goals** tab is displayed and includes the goals that you accepted. If you have any active goals of the same type, then the active goal is marked complete and given an end date of today. The new goal of the same type replaces the active goal that is completed. All reminders are also removed for the completed goal.

**Results of this task**
The ordering provider is sent a notification that the goal was accepted.
The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.
What to do next
Connect to your wireless device, such as a wireless scale, blood pressure monitor, or blood glucose meter, or manually enter additional readings, as needed, if you do not have a wireless device.
Reminders can be changed at any time by clicking My Reminders from the Goals tab or by clicking Edit next My Reminders in Notification Preferences. Default goal reminders can only be edited or deleted when accepting the goal. You cannot undo an edited or deleted default goal reminder.

Add a reading
You must accept a goal before you can enter a reading.

The goal includes the rules set by your provider. If the rules are broken, your provider receives a notification after your reading is entered. You also receive a goal alert in Action Center if your reading violates 1 or more rules set by your provider.

1. For the first reading, click enter your current reading or connect to a wireless device to have readings automatically sent to the patient portal.
   For example, if you are entering a weight measurement, click enter your current weight or use a compatible device to enter your reading electronically.
   If this is not the first reading, a graph is displayed with your progress. Click Add a Reading to add an additional reading.

   **Figure 19: Adding a weight reading**

   A window opens where you can add your reading.
   The following example shows the Add Weight Vital window that is displayed when you add a weight reading.
2. Click **Save**.

**Results of this task**

The reading is saved in the patient portal and analyzed. A message is displayed as your measurements are analyzed.

If the reading did not break a rule, a message is displayed indicating that analysis is complete and no issues were found.

The goal is updated and a graph is displayed. Additional information about each reading is available in a tooltip when you point to each data point.

**Note:** Only readings that fall within the start and end date are included on the goal.
If a reading is outside the parameters set by your provider, a goal alert is displayed after the reading is entered.

**Figure 20: Goal alert for broken rule**

Weight of 165.9 lbs on 5/12/2014 at 11:05 AM triggered the following alert:

Weight increased by 3 lbs in 1 day
An alert is also flagged on the graph and table view.

**Figure 21: Goal violation on graph view**

**Figure 22: Goal violation on table view**
Goals

What to do next
Enter additional manual readings or connect to a wireless device for measurements to continue capturing readings and working to accomplish your goal.

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

1. Open the Goals tab in either of the following ways.
   > Click My Health > Goals.
   > Click the new goal notification on Action Center to access the Goals tab.
   The Goals tab is displayed.
2. Click Click here to view the new goal.
   Goals opens.
3. Select Decline for the goals you want to decline.
4. Click Continue.
   The Declined Goals tab is displayed and the declined goal is listed.

Results of this task
The ordering provider is sent a notification that the goal was declined.
The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

Decline an active goal
You can decline a new or active goal that has been accepted and is listed in Active Goals on the Goals tab.

1. Click My Health > Goals.
   The Goals tab is displayed and Active Goals opens.
2. Click decline this goal.
   Decline Goal opens.
3. Click Decline Goal.
   When you decline the goal, the goal is listed under Declined Goals with the date that the goal was declined. There are no readings displayed for declined goals.

Results of this task
The ordering provider is sent a notification if you decline the goal.
The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

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

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

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

1. From the Home tab, click My Health.
   My Health opens.
2. Click the Goals tab.
   Goals opens.
3. Expand Active Goals.

4. From an active goal, click Health Sources.
   My Connections opens and With Devices and Apps through Health Sources expands.
Results of this task
You have accessed Health Sources.

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

Notifications
Notifications are sent for goal reminders, new goals, completed goals, appointment reminders, personal health record (PHR) updates, and other health-related reminders.

You can set up goal reminders when you accept a goal or from My Reminders. These reminders can be changed at any time.
You or an authorized individual (proxy) can receive goal messages through email and text message. When a provider creates a new goal for you, you can receive an email or text message, and email message is sent to your **Inbox** in the patient portal.

**Figure 23: New goal message in Inbox**

Inbox

The Office of FollowMyHealth
New Goal
3/6/2014 4:13 PM

The Office of FollowMyHealth
New Goal
3/6/2014 11:10 AM

Community Clinic 113
Welcome to Community Clinic 113
2/11/2014 6:20 PM

FollowMyHealth™
Welcome to the family!
2/11/2014 4:39 PM

- From: The Office of FollowMyHealth
- To: [Redacted]
- Date: 3/6/2014 4:13 PM
- Subject: New Goal

Hello [Redacted],

Your provider has set new goals for you. Please go to MyHealth and select the Goals tab to get started.
A new goal action item is also displayed under the **Action Center**.

**Figure 24: New goal action item under Action Center**

A goal alert is a type of notification that is displayed in **Action Center** if your reading violates 1 or more rules set by your provider. You or an authorized individual can receive additional goal alerts through email and text message. Goal alerts are also displayed as banners on the **Goals** tab when you manually enter readings.

**Figure 25: Goal alerts are displayed in Action Center**
You can configure the notification method when you add the goal reminder, on the Notification Preferences tab, or when you accepting a goal from the Goals window. You cannot turn off notifications for broken rules from displaying in Action Center.

**Add a reminder**

You can add a reminder to notify you when to take measurements, when your goal ends, or other customized reminders. These can be sent through emails or text messages.

You can also accept default reminders during the goal acceptance process.

1. Click **My Health > Goals**.
   The Goals tab is displayed.

2. Click **My Reminders**.
   My Reminders opens.
   If you have reminders, a table lists the reminders. If you do not have reminders, only the communication method settings are displayed.

   **Note:** You can also open My Reminders when you click **Edit** in the My Reminders section in My Account > Preferences > Notification Preferences.

3. Select the communication method for receiving your reminder.
   > Select **Send email reminders** to get your reminder through an email message. Click **Change** to update your email address. **Send email reminders** is selected by default.
   > Select **Send text message reminders** to get your reminder through a text message. Click **Add a cell phone number** to add an alternative cell phone number. This method can be used only after the cell phone number is verified.
   > Click **Edit and remove** if you already have a cell phone number added and want to edit or remove the number.

4. Click **Add Reminder**.
   Reminder opens.

5. For **Name**, enter a name for the reminder.

6. For **Type**, select how often you want to receive the reminder.
   Valid values are:
   > **Once**
   > **Daily** (default)
   > **Weekly**
   > **Monthly**
   > **Yearly**
The type selected determines the **Frequency** preferences that are displayed.

7. **From This is a reminder to**, select the reason for the reminder.
   Valid values are:
   - **Do something** (default)
   - **Take weight**
   - **Take blood pressure**
   - **Take blood glucose**

8. **For Reminder Text**, enter the information that you want to see in the reminder. This is the text that is emailed or text messaged to the number provided.

9. **For Frequency**, enter how often, the day of week, and the time of day that you want the reminder to occur.
   The reminder type selected in step 6 determines the **Frequency** preferences that are displayed.

**Daily**

The value must be a whole number that is greater than 0 (zero) and less than or equal to 365. The default is 1 day.

The time of day must be valid and set according to your time zone. The default time is now.

At least 1 day of the week must be selected.

**Monthly**

Select an exact day of the month, for example the 15th of each month. Or, select a relative day of the month, for example, the last Sunday of the month.

If you select an exact day of the month, the numeric value is displayed and the current day is the default. This value must be a valid day of the month with a value between 1 and 31. When the reminder is scheduled to a date that the month does not reach, the last day of the month is changed to the last day of that month. For example, if you select 31 and the month is June, the number is changed to 30. If the reminder occurs on the last day of the month, set the value to 31 and the application changes the value to the last day of the month when scheduling the reminder.

If you select The, the other day boxes are replaced with the day of the week and the day within the month it counts for. For example, The Third Tuesday. The value that is entered in the month box must be between 1 and 12.

The time of day must be valid and set according to your time zone. The default time is now.

**Weekly**

The value must be a whole number that is greater than 0 (zero) and less than or equal to 52. The default is 1 week.
The time of day must be valid and set according to your time zone. The default time is now. At least 1 day of the week must be selected.

**Yearly**

The value must be a whole number that is greater than 0 and less than or equal to 20. The default is 1 year.

Month and day defaults to today. The month list includes all 12 months. The day must be a whole number between 1 and the number of days in the selected month. Do not enter more than 31.

**Once**

The date must be in the future. The default is today's date.

10. For **Duration**, select the start and end date from the calendar tool.
    
The default start is the current date.
    
The duration type has the following valid values:
    
    > **No end date** (default)
    > **End by**
    > **End after**
    
    If **End by** is selected, a date box is displayed. You must enter the end date with the calendar tool.
    
    If **End after** is selected, an occurrences box is displayed. You must enter the number of times that you want the reminder to occur. The number must be a whole number greater than 0 (zero).

11. Click **Set Reminder**.
    
    When you click **Set Reminder**, a validation process is started. If there are no validation errors, the reminder is saved.
    
    **Important:** If you click close before you click **Set Reminder**, My Reminders closes and your changes are not saved.

**Results of this task**

The reminder is displayed in the table on My Reminders in alphabetical order.
Delete a reminder from My Reminders

You can delete a reminder from My Reminders.

You can also delete default reminders during the goal acceptance process.

1. Click My Health > Goals.
   The Goals tab is displayed.
   You can also view reminders from Notification Preferences.
2. Click My Reminders.
   My Reminders opens and the reminders are listed.
3. Click the reminder that you want to delete.
   The reminder details are displayed.
4. Click Delete.
   Confirm Delete opens.
5. Click Delete.

Results of this task
You have deleted the reminder and it is removed from My Reminders.

Edit a reminder from My Reminders

You might want to change a reminder. In this scenario, you can edit the reminder from My Reminders.

1. Click My Health > Goals.
   The Goals tab is displayed.
2. Click My Reminders.
   My Reminders opens, and the reminders are listed.
3. Click the reminder that you want to edit.
   The reminder details are displayed.
4. Enter the changes for the reminder.
5. Click Set Reminder.
   The reminder closes and the reminders list is updated to reflect your changes.

Results of this task
You have edited the reminder.
Chapter 11

My Info

The My Info tab contains your demographic information.

From the Demographics tab, you can manage your basic information, insurance, emergency contacts, and the person who is responsible for your account.

Demographics

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

Edit demographics

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

1. From My Info, select Demographics. Demographics opens.

2. From Basic Information, update basic information or add information that is not automatically filled.

Some of the information in Basic Information, such as contact information, name, date of birth, and address might be filled based on the information that your healthcare organization already has recorded for you.

The email address that is listed in Basic Information is also listed in the Notification Preferences tab, your FMH Secure Sign In preferences, and the Goals tab in My Health. If you change the email address in 1 of these locations, the change synchronizes for all locations. For example, if you change your email address under Basic Information, the change is also made to the email address that is listed under these other locations.

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

3. From Social Information, select your race, ethnicity, and language.

   The federal government mandates the healthcare organization to collect this information. Select Declined to Answer if you do not want to provide this information.
4. Click **Save**. **Save Successful** opens.
5. Click **OK**.

**Edit your preferred pharmacy**

Follow the steps in this task to edit your preferred pharmacy from the **My Info** tab.

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

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

**Edit emergency contact**

The **Emergency Contact** tab lists the person that your healthcare organization should contact if there is an emergency when you are with your healthcare provider.

1. From **My Info**, select **Demographics**. **Demographics** opens.
2. Click the **Emergency Contact** tab. The **Emergency Contact** tab is displayed.
3. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information.
Some of the information in Emergency Contact might be filled based on the information that your healthcare organization has recorded for you.

4. Click **Save**.  
   Save Successful opens.

5. Click **OK**.

### Edit responsible party

The Responsible Party tab indicates the person who is responsible for any charges incurred with the healthcare organization. This person is also referred to as the guarantor.

1. From **My Info**, select **Demographics**.  
   Demographics opens.

2. Click the **Responsible Party** tab.  
   The Responsible Party tab is displayed.

3. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information.  
   Some of the information in Responsible Party might be filled based on the information that your healthcare organization already has recorded for you.

4. Click **Save**.  
   Save Successful opens.

5. Click **OK**.

### Edit insurance information

The Insurance tab lists your primary, secondary, and tertiary insurance information.

1. From **My Info**, select **Demographics**.  
   Demographics opens.

2. Click the **Insurance** tab.  
   The Insurance Information tab is displayed.

3. Enter information in **Name**, **Contact Information**, and **Address**, or update the existing information for each section, Primary, Secondary, and Tertiary.  
   Some of the information in Insurance might be filled, based on the information your healthcare organization already has recorded about you.

4. Click **Save**.
Save Successful opens.

5. Click OK.
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