# How to Use the Patient Portal

## MY ACCOUNT DETAILS

To access **My Account Details,** click the icon or text once you have logged into your Portal. If you enter or modify your information, always click the green save button at the end of each section to confirm the information you have entered.

The My Account Details page contains the demographic information you have provided which you can review at any time. The My Account Details consist of 3 sections:

1. Basic Contact Information (answer all questions)
2. Your photo (optional, but it allows us to get to know you better)
3. Insurance Information
    - It is important that you enter this information correctly. This is the information that auto-populates to your Insurance Reimbursement Form (HCFA) for you to submit back to your insurance.
    - You must put a valid credit card on file at the time of registration to activate the Portal. This information is stored or can be edited under the Invoices & Payments tab

MDHQ is not a free portal as many practices use; we only allow individuals on the Portal who are serious about becoming a patient of NNPA.

## QUESTIONNAIRES

This section contains all the forms you will need to complete when requesting an appointment. All forms that correspond to the appointment type must be completed before your NEW appointment request is confirmed. To begin;

- Click the icon or Questionnaires line item in the Portal then,
- Click the green START button for each questionnaire you will need to complete.
- Complete each applicable questionnaire in its entirety.
- Click the green SUBMIT button at the end of each questionnaire.

In general:

- Complete the questionnaire at **least 3-5 days prior to the appointment** date
- A Pre-Travel/Post Travel questionnaire must be completed for each travel medicine appointment requested.
- We recommend that you open the questionnaire, review the questions, make sure you have all the information you need and then fill out the questionnaire.

If needed, you **can save your progress** using the Save and Continue Later button at the bottom of the questionnaire.

## REQUEST APPOINTMENT

In the Request Appointment section of the Portal, you can select a clinician and request an appointment that is convenient for your schedule. If the preferred date cannot be scheduled online or to schedule a same-day appointment you will need to call our office during normal business hours for assistance. For ALL NEW patients: you are required to pay **Primary Care or Functional Medicine packages in full before requesting an appointment.** Appointments are not confirmed until all Questionnaires have been completed. This deposit is applied to the visit fee once you have been seen. To request an appointment:

- Click the icon or Request Appointment line item, then use the down arrows to,
- Select Provider then,
- Select Appointment type (wait a few seconds for next option to appear)
- Select Preferred Date (available dates will appear as a solid green box)
    - The appointment type displays the applicable fees.
    - The dropdown box explains each appointment type.
    - Use the description box to provide additional information pertinent to your appointment.

Click the green Request Appointment tab to submit your request. Our NNPA staff will need to confirm the request, **watch for your confirmation email**.

## SECURE MESSAGES

A secure message is a message between current Primary Care patients (who have had a physical exam within the last year) and the NNPA staff; secure messaging does not take the place of an actual medical appointment. A secure message functions just like an e-mail; it is not an instant message and our staff will respond within 24-48 business hours. Administrative messages sent to the Nurse Practitioner will be re-routed to the administrative staff. Please limit messages to the Nurse Practitioner to clinical issues only. Clinical secure messages are good for non-urgent questions or request such as:

- Medication or supplement questions that are **NOT PRESCRIPTION REFILLS**
- Brief Specialist questions
- Labs and/or Diagnostic follow-up tests questions
- Responding to questions from your NNPA staff

Administrative secure messages are good for non-urgent questions or requests such as:

- Appointment requests, change and/or appointment cancellations
- Medical records request
- Request a written referral.

To access Secure Messages:

- Click the icon or the line-item Secure Messages
- Click the green SEND A SECURE MESSAGE button.
- Complete each section then

- Click the SEND MESSAGE button.
    - When your message is addressed, a notification will get sent to the e-mail on file.
    - You will need to login to your Portal to view the response to your secure message.
    - Allow 24 to 48 business hours for our staff to respond to your secure message.

## INVOICES & PAYMENTS

To access the INVOICES & PAYMENTS section of the Portal, click the icon or the line item. Here you can:

ADD/EDIT CREDIT CARD:

- Click the blue ADD/EDIT Credit Card button.
- Complete each section
- Click the green SAVE THIS CARD! Button

VIEW STATEMENTS: history of charges and payments

- History of charges and payments
- Pending (Payment in full is collected on the same day of your visit)
- You can print from this page

PRINT INVOICES:

- View Invoices
- Invoices are generated by the NP
- Contact our office if you do not see an Invoice

## LABS & DOCUMENTS

There are many functions of this section, including uploading documents for your clinician, viewing prescriptions, reviewing lab test results, reading handouts from your NP. Please note: you must use the PDF format to upload a document. To access the Labs & Documents:

- Click the icon or line item
- Click the green UPLOAD THE DOCUMENT button
- Complete each section
- Click the SAVE DOCUMENT button

By clicking each line item in Recent Documents, you can review each form. To view the document in its entirety, click the individual line item.

## MY VITALS

This is where you can view/record your blood pressure, weight and height history. To ADD A NEW READING:

- Click the green button by the applicable line item

- Complete each section
- Click the green SUBMIT button.

## MY MEDICATIONS

This section contains a list of medications prescribed by your clinicians or, medication you, the patient, has entered into your Portal. Click each medication separately to view addition information. To add a medication:

- Click the green ADD ANOTHER MEDICATION button
- Use the - Look up drug box to generate medication information
- Click the corresponding medication in the dropdown box and click the gray SELECT DRUG TO CONTINUE button.
- **REFILL REQUESTS** should be made here. Requests are only completed if not due for an appointment, if due it is at the discretion of the NP to refill based on the medication and history. There may be a charge to refill.

## MY SUPPLEMENTS

This section contains a list of your supplements. Clicking on the name of a supplement shows you the brand name, as well as general dosage/timing instructions. If your clinician has recommended different dosage/timing instructions during an appointment or via any responses in Secure Messages, please follow the clinician's instructions instead. To add a supplement:

- Click the green ADD ANOTHER SUPPLIMENT button
- Use the - Look up drug box to generate medication information
- Click the corresponding medication in the drop-down box and click the gray SELECT SUPPLEMENT TO CONTINUE button.

Please list each supplement in your Portal for a continuous record that can be viewed by your Clinician.

## MY VACCINE RECORD

Vaccines given to you through our office are automatically added to your vaccines list by the NP. You may add a vaccine to your list that was given by another provider:

- Click the gray icon and complete the 4 boxes
    - Who administered this vaccine?
    - Date received
    - Batch/Lot ID# - if available
    - Other information about this vaccine

Then click the green ADD THIS VACCINE button. Please Note: green icons indicate the vaccines on file and, the orange icons indicate the vaccines you, the patient, have requested be added pending review by the NP. * Please note, vaccines given before the Portal was in use are found in your Labs and Document section under the Vaccines category.

## MY PHARMACIES

Set preferred pharmacies here to make it fast and easy for your NP to e-prescribe your medication and lessen pharmacy errors.  You can remove a pharmacy from the list, change your primary pharmacy, or add a new preferred pharmacy.

- Click the green ADD ANOTHER PHARMACT button
- In the Look up pharmacy box, add the first few letters of the pharmacy name
- Select your preferred pharmacy
- Click the green COMPLETE AND ADD THIS PHARMACY button.

## MY VISIT SUMMARIES

This section contains notes, each of which summarizes an appointment or conversation with your clinician. A summary might include the clinician's assessment (diagnosis), new or modified prescriptions, orders or laboratory requests, as well as a list of suggested instructions for you. Once your clinician marks a summary as "complete," it will automatically appear on the list below. If supplements were recommended, you will also find dosage/timing instructions here.  To access summary information:

- Click the line item
- You SHOW and/or HIDE detail by clicking the green button to the right of the line item.