Prepare for Your Visit

Complete Forms on the Patient Portal

Once you have activated your account, please use the Patient Portal to complete visit forms and view your health information.

1. Once logged in to the Patient Portal, select My Health from the main navigation bar.

OFFICE NAME	🐶 My Health 🚺	Appointments	Messages	Classical Tests and Results	👤 John Doe 🗸
Doe, John DOB: 12/11/1985 I® Alerts: Unspec Allergies: Unspec	(36) Birth Sex: Male MRN: M filed fifed	1M0000000001 PMS ID: 115062PAT	00000001		
Video Visits Upcoming Appointments Past Appointments Results	Video Visits You cur video visit By selecting Join Video Visit, you are a days.	rently have no active sits greeing to a video stream with your provider a	and also agree you have not been s	een by the provider within 3	

2. From the My Health page, select My Forms.

Family History	Language	
runniy rustory	English v	
Problem List		
	Ethnic Group	
My Forms	Not Hispanic or La 🗸	
	Gender Identity	Patient Preferred
	Unspecified ~	Pronoun
		- Select One - 🛛 🗸 🗸

3. Any forms that have been assigned to you will be available to review and edit. Select Start to begin reviewing the forms and making applicable changes.

<u> </u>			•			
Contact Info	Forms Sent From Practice					
Insurance and Pharmacy	Title ≑	Date Received 👻		Status ≑		
Medications	New Patient Paperwork	08/19/2022		Incomplete	Start	
Allergies	Total Results: 1		« < 1 >	»		View Records By 25 ×
Past Medical History						

- 4. A pop-up window will appear with the specified form. You can place your cursor in the appropriate fields and enter the applicable information. You have the option to *Save and Exit* or *Submit Form*.
 - Save and Exit Marks the form In Progress and allows you to continue to edit.
 - Submit Form Closes the form and submits it to the office.

08/19/2022 New Patient Paperwork	8
Save and Exit Submit For	m

5. Once complete, select Submit Form.

You will receive a pop-up alerting you that you are submitting the form to the office and you will not be able to edit any further. When ready, select **Submit Form**.

2 N	Submit Form	×
	Submitting this form will send to the practice. You will not be able to edit any further. Would you like to submit?	
e(Cancel Submit Form	

Add or Update Medical Information

In this section, you will learn how you can verify your contact and insurance information, update your medical history, and add your preferred pharmacy.

1. Once logged in to the Patient Portal, select My Health and navigate through the sections to enter and/or update your *Medications, Allergies* and Past Medical History.



- Contact Info View basic contact and demographic information.
- Insurance and Pharmacy View insurance information and add or edit pharmacies. See below for additional instructions.
- Medications Add or edit your medications list.
- Allergies Add or edit your allergies.
- History Add or update Past Medical History, Specialty-Specific History, Social History and Family History.
- Tests & Results View any result that your medical provider has posted.

Add Your Preferred Pharmacy

In this section, you will learn how to add your preferred pharmacy to your patient chart. Adding your pharmacy will assist our office with sending electronic prescriptions and medication refills.

1. From the My Health section of the portal, select Insurance and Pharmacy.



- 2. There are two options to enter your pharmacy information, *Add Surescripts Pharmacy* and *Add Manual Pharmacy*.
 - Add Surescripts Pharmacy (try this option first) Allows you to search for registered pharmacies that are capable of sending and receiving electronic prescription requests.
 - Add Manual Pharmacy If you were not able to find your preferred pharmacy through the Surescripts option, you can use Add Manual Pharmacy to manually enter pharmacy information to your chart. It is recommended that you first attempt to add a Surescripts pharmacy before using this method.
- 3. Select Add Surescripts Pharmacy.



4. Use the *Filter* options to find your preferred pharmacy. Then, select Search.

Tip: Not all fields are required. Use any combination of the criteria to locate your pharmacy. Common search methods include *Phone* number only, or *Name* and *Zip Code*.

Add ePres	cribing Pharmacy		
Pharmacies			
Filter			
Name Phone	5852392059	City State Zip Code	Select One
Refill enabled	YesNo ⊚Any	Туре	Retail Mail Any Search Clear filter
Store Name	≜ Pho	one 🚊	Fax <u></u> Address <u></u> City

5. Locate the pharmacy in the list of results by verifying the name and address. Once found, select the blue *Store Name* to add the pharmacy.

Refill enabled	⊖Yes ⊖No	o 💿 Any	Type	● Retail (
				Search
Store Name		🛓 Phor	ne 🚊	Fax 🚊
#003 Eastway	NY Test UAT	5852	2392059	5852392044
#008 Mt Laure	el NJ Test UAT	5852	2392059	5852392044
#016 Fairfax V	A Test UAT	5852	2392059	5852392044
#040 Woodmo	ore MD Test UA	T 5852	2392059	5852392044

Access Your Medical Records

View, Download, and Print Your Visit Notes

The Patient Portal allows you to access your medical records, including completed visit documentation from your doctor or other qualified healthcare provider. The following instructions will guide you through how to locate these records within the portal.

6. Once logged in to the portal, select Appointments from the main navigation bar.

OFFICE NAME		🐶 My Health	Appointments	nessages 🌀	CI Tests and Results
Doe, John DoB: 12/11/1985 (36) Birth Sex: Male MRN: MM0000000001 PMS ID: 115062PAT0000000001 Allergies: Penicillins					
				· ·	
Video Visits		Video Visits			

7. Select Past Appointments.



8. From the *Visit Date* column, select the blue hyperlink for the visit you would like to view.

OFFICE NAME	💔 My Health	Appointments	Messages	C Tests and Resul	lts
Doe, John DOB: 12/11/198 P Alerts: Unspe Allergies: Penici	15 (36) Birth Sex: Male MRN: ecified illins	MM0000000001 PMS ID: 11506	52PAT00000001		
Video Visits	Past Appointments		•		
Upcoming Appointments Past Appointments	Start Date: mm/dd	/yyyy End Date:	08/23/2022	Apply	
Results	Visit Date	🖕 Attend	ees	Impressions	Lo
	Monday, Aug 22, 20;	22 11:11am EDT Biller: I	y Provider & Primary Doe, Jane	Headache (R51.9)	OF
			🔤 🖂 Page 1	of 1 ↦ ⊨ 5	_

Note: If the visit link is in plain black font, this means the visit is not ready to be viewed. Check back later, or contact our office.

9. Your internet browser's PDF viewer should open the document for you to view. You should also have options to download or print the document.

