Utilizing Patient Portal within SuccessEHS

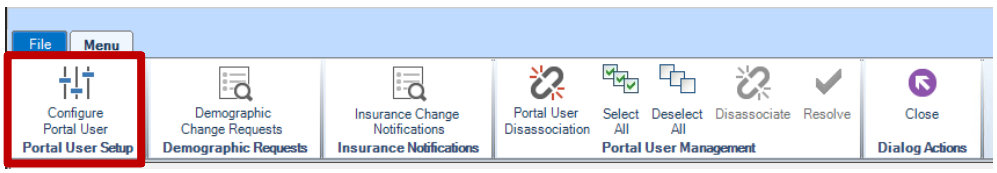
Outlines tasks available and workflows for interacting with Patients through the SuccessEHS Patient Portal from within SuccessEHS

Activating a Patient/Guarantor for a Portal Account

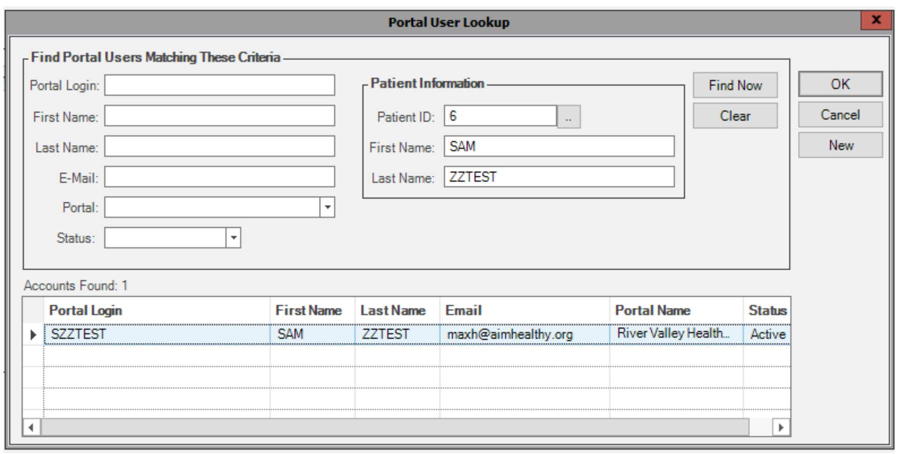
1. Go to **Patient Administration**

2. Select **Tools → Portal User Management**

3. Select **Configure Portal User** from the top menu ribbon



4. The **Portal User Lookup** window appears. Search for the "**Portal User**" using the first name and last name option



5. If there are no active accounts for the patient, select **New.** You will then need to complete the following information:
    a. First Name
    b. Last Name
    c. Portal Login: **Should be First Name Initial and Last Name (i.e. – Msmith)**. Note if the login is already used by another patient you can modify the naming configuration by adding a number at the end
    d. E-Mail: **Enter the person's email address**

6. Once complete, select **Add Patient** under the **Associated Patients** window. Search for the patient and select **OK. Note: If you need to associate multiple accounts you can continue to add patients**

7. Once complete, select **Save** and the system will automatically send the user a **Portal Welcome Email** with their login credentials

Responding to Medical Message

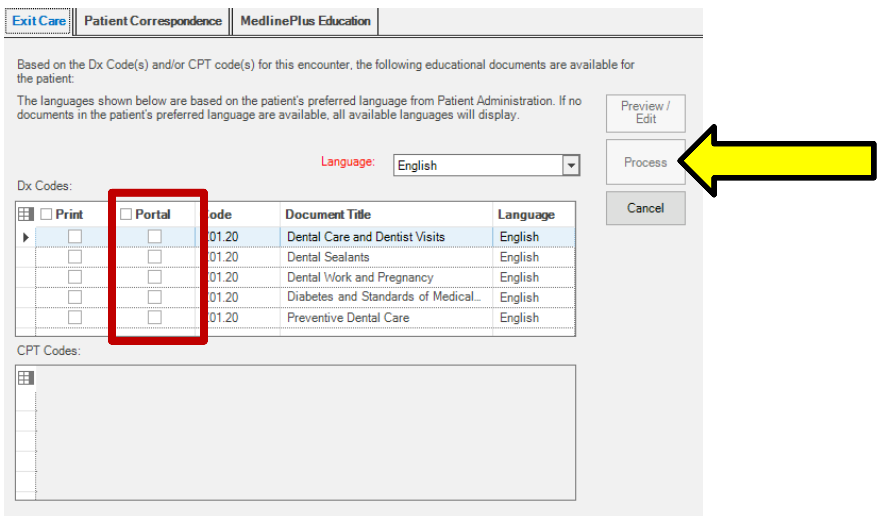
- Patients have the ability to ask questions via the patient portal and those questions are automatically routed via a **Medical Message**

- Responses to the medical message will be routed back to the patient via the portal and are recorded both in the history of the patient's portal account as well as the history of their messages within **Clinical Console**
    - To know that the message is from a portal patient, you will see that the From and Patient will be the same name and the **By:** field will say **KBASE**
    - These messages should be handled like any other medical message

Sending Education to Patient Portal

- Based on the Diagnosis/CPT codes that were ordered, patient education may become available. Staff have the ability to send patient education documents directly to the patient's portal account, instead of printing the information. **Note: This functionality is only available with Exit Care Education**

- To send an item to the Patient Portal, simply check the corresponding box in the **Portal** column. When all items have been selected, click **Process**



Sending Encounter Summaries to Patient Portal

- Upon check-out, encounter summaries will automatically be sent to the patient's portal account, if active. No user intervention is needed

Processing Demographics/Insurance Changes

- Patients have the ability to submit demographics and insurance change requests through the portal. These changes do not automatically update in **Patient Administration** and require user intervention, prior to posting the changes to the chart.

- There are two ways that you can handle demographics and insurance change requests that come through the portal.
    a. When pulling a patient up in **Patient Administration, Check-In, Scheduling, etc.** you may receive a pop-up window **Pending Portal Change Requests Notification**
        i. Select **View Requests**
        ii. The **Portal User Administration** window will appear. Double-click on the **Request**

    iii. You will see **Patient Demographics – Current** and **Patient Demographics – Change Request.** All information requested to change will be in **RED**. If the information is correct you can select **Approve → Close**

b. The second way is to open **Patient Administration → Tools → Portal Demographics Requests**
    i. Select **Demographic Change Requests** or **Insurance Change Notifications**
    ii. Choose **Request Dates**
    iii. Select **Request Status** as **Pending**
    iv. Select **Find Now**
    v. All open requests will appear and you can accept or deny the changes

<u>Processing Medication Refills</u>

- Patients have the ability to request a refill on an active medication. All refill requests will populate into the **Medication Requests** screen and should be handled like a standard medication request

<u>Processing Appointment Requests</u>

- Patients have the ability to request an appointment through the **Wait List** functionality

- To view any appointment requests, go to **Scheduling → View Wait List…**