



2014

**PatientPortal
User Manual**

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IMPORTANT: The Meaningful Use Dashboard provides statistical information for aiding healthcare providers in meeting Meaningful Use Objectives. Healthcare providers are cautioned that the denominators shown on the Meaningful Use Dashboard are based solely on information entered into the ChartMaker® Clinical Module. If a patient encounter was not entered into the Clinical Module, that encounter is not included in the denominator for the statistical calculations on the Dashboard. In order to get accurate statistical information for the percentage calculation, to determine if you meet the Meaningful Use requirements, you may need to run additional reports. Please refer to the Center for Medicare and Medicaid Services (CMS) and this user manual for more information about calculating the correct percentage for each individual Meaningful Use Objective.

<http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/index.html?redirect=/ehrincentiveprograms>
<http://www.sticomputer.com/sticustomers.php>

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Overview

ChartMaker® PatientPortal

The ChartMaker® PatientPortal is an online service that allows a patient to keep track of their personal health information. It will also allow practices to share and receive information easily with patients.



Details:

- Available with versions 4.3 and higher
- Requirement for Stage 1 (Core Measure: View, Download, Transmit) and Stage 2 (Core Measures: View, Download, Transmit and Secure Electronic Messaging) of the Meaningful Use program starting in 2014
- Configurable by the Practice
- Ability to send and receive messages to and from your patients
- Message Types include: Appointment and Refill Requests, Billing and Health Questions, and General Messages
- Upload health related educational resources for your patients
- Patients create their own username and password
- Patients can update their demographic information
 - Information includes: General information, Responsible Party, Employment Information, Insurance, Emergency Contacts, Pharmacy, Medications, Allergies, History Information
- Patients can view clinical summary information (*automatically gives you credit for Core Measure: Clinical Summaries in the Meaningful Use program)
- Contact Software Support for more information (800-487-9135 or email swsupport@sticomputer.com)

REGISTRATION INSTRUCTIONS

Complete the following steps to start the process of registering your practice with the ChartMaker® PatientPortal service. There is a fee of \$29/physician, \$15/NP, and/or \$15/PA per month.

1. Go to www.sticomputer.com
2. Click “CUSTOMERS”
3. Click “Login”, enter your credentials and then click “Log In”

ALTERNATE METHOD: If you do not have login credentials, click “Registration”, complete the registration form and click “Register”.

4. Click “PatientPortal” (from the left navigation pane)
5. Click “Click here to register for ChartMaker® PatientPortal”
6. Enter the applicable information and click “Submit”

NOTE: Upon completion of this form, an STI Representative will contact you, via the email address you provided, to complete the setup process, as well as provide information about enrolling for PatientPortal training.

Pages

The ChartMaker® PatientPortal has pre-defined pages, which every practice can configure. The page options will differ depending on the type of user that is logging in. Administrators for your Portal will see pages allowing them to configure the Portal while Patients will see patient-specific pages and information.

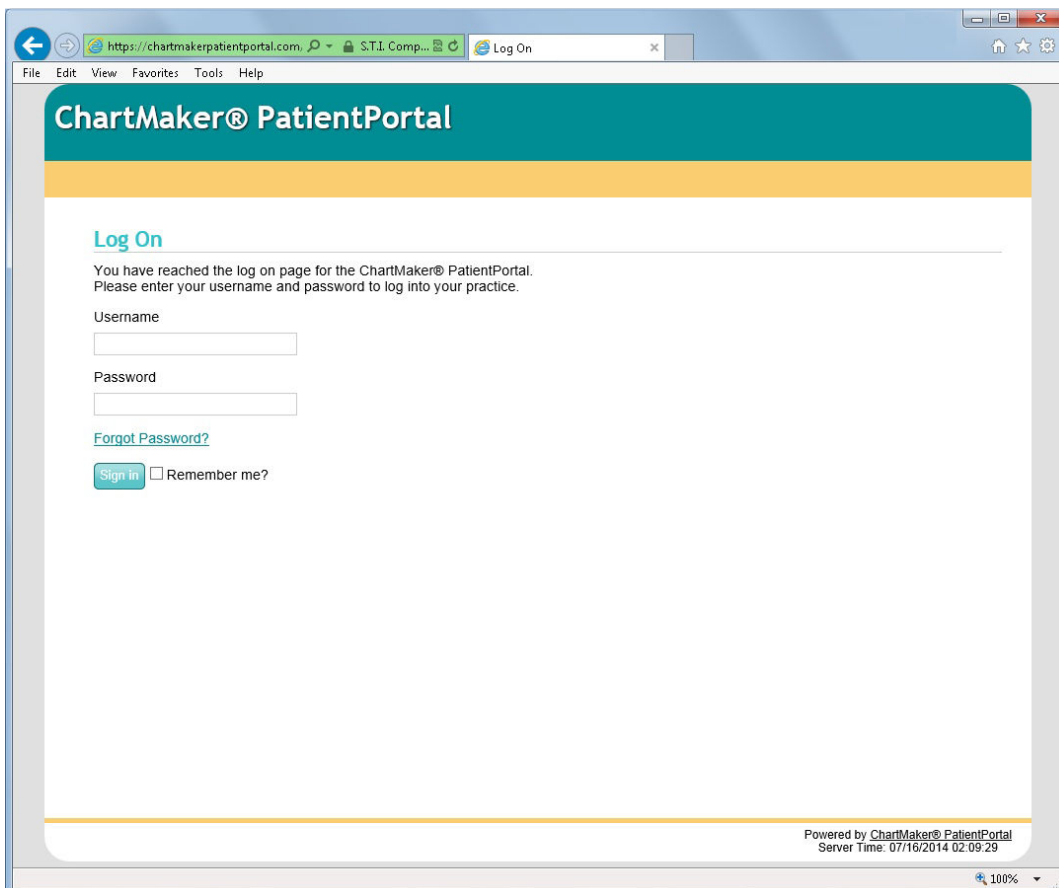
Everyone will go to www.chartmakerpatientportal.com to access the PatientPortal.

NOTE: Patients should not be instructed to go to this page unless they have completed registration. There is no way to create a new user from this page.

COMMON PAGES (ADMINISTRATORS AND PATIENTS)

Log On:

The Log On page is the first page patients and administrators will encounter after typing in the web address into a browser. Everyone using the ChartMaker® PatientPortal will access this same page. From this page the user will be able to log in with their previously registered credentials and/or send a request for their password (“Forgot Password?”).

A screenshot of a web browser displaying the ChartMaker® PatientPortal Log On page. The browser's address bar shows the URL "https://chartmakerpatientportal.com" and the page title is "Log On". The page has a teal header with the text "ChartMaker® PatientPortal". Below the header, the page is titled "Log On" in teal. A message states: "You have reached the log on page for the ChartMaker® PatientPortal. Please enter your username and password to log into your practice." There are two input fields: "Username" and "Password". Below the "Password" field is a link for "Forgot Password?". At the bottom of the form area, there is a "Sign in" button and a checkbox labeled "Remember me?". The footer of the page indicates it is "Powered by ChartMaker® PatientPortal" and shows the "Server Time: 07/16/2014 02:09:29". The browser's status bar at the bottom shows "100%".

Home:

The Home page is the first page a user will see after logging into the Portal.

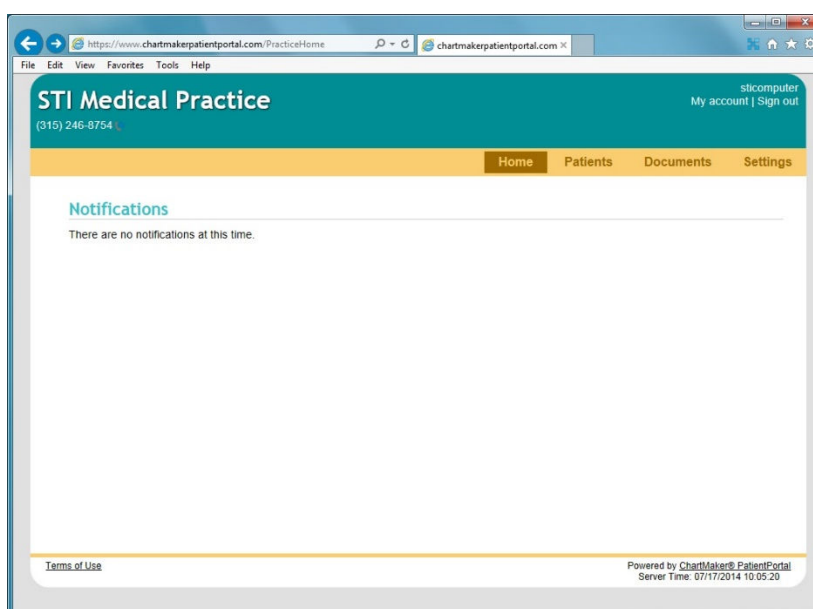
Administrators will see a “Notifications” section where messages from STI Computer Services may be displayed.

Patients will see a welcome message/instructional text on the left. This section will be configured by your Administrator. On the right, the patient will see their name and address as well as any notifications regarding changes to their account.

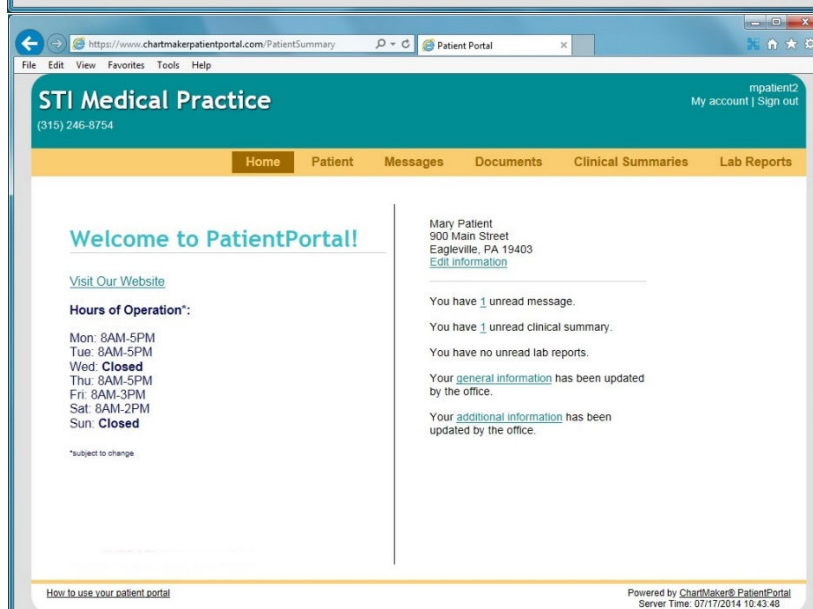
Patients will be able to click “Edit Information” to modify their contact details. When they do so it will redirect them to the “Patient” page.

If the patient has new activity on their account, they will be able to click on the numeral in the notification which will redirect them to the applicable page (Clinical Summaries, Labs, etc.) to view the information.

Administrator View:




Patient View:





Documents (Administrator):

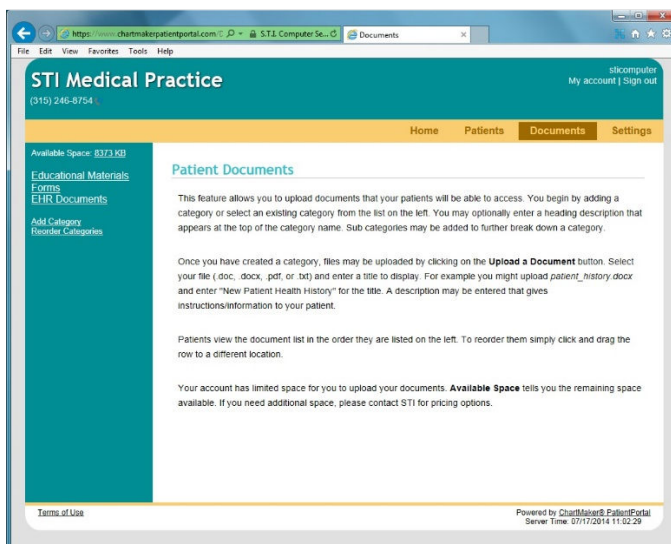
The Documents page will allow the Administrator to organize and modify the document options that the patient can access from the patient's (or patient representative's) Documents page. The documents can be grouped by categories for easier access. Acceptable document types include .doc, .docx, pdf or .txt. Your account has 10 MB by default for you to upload documents. "Available Space" indicates the remaining space available. If you need additional space, please contact STI for pricing options. This information is not patient-specific and will be seen by all registered patients and/or patient representatives.

To configure this page, start by clicking "Add Category", enter a Category Name and Description and click "Save". Then click "Upload" () to begin adding documents. Click "Choose File", enter a Display Name, Description (optional) and click "Save". Repeat those steps for any additional documents.

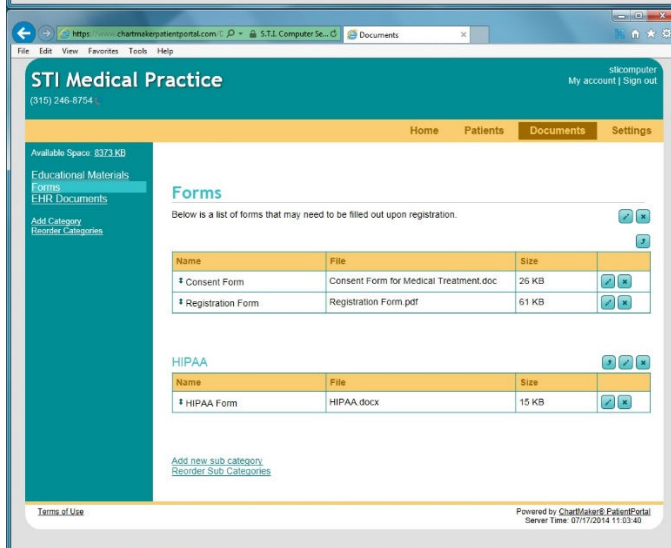
To reorder documents within a specific category, simply click and drag the row to the desired location. To reorder the categories, click "Reorder Categories" and click and drag the row to the desired location.

To modify an item, click "Edit" (). To remove an item, click "Delete" ()

Main View:

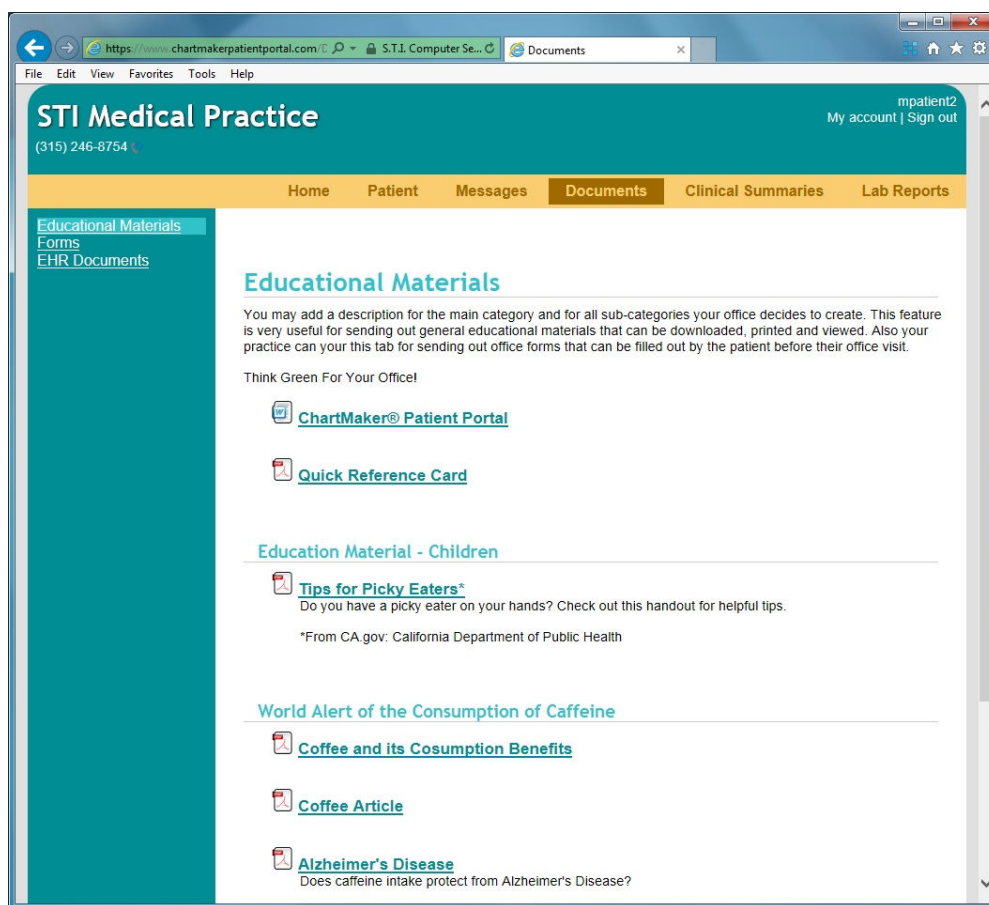


Category View:

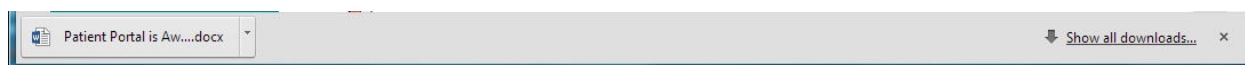


Documents (Patient):

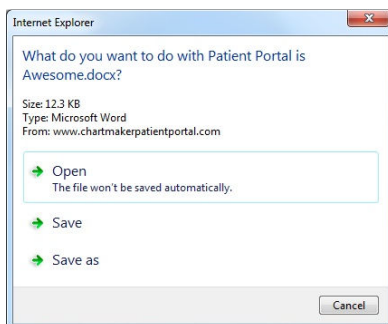
The Documents page will allow the patient (or patient representative) to view or download materials that the practice has made available. These documents could be registration forms, educational materials, etc.



The steps taken after the patient clicks on an individual document will vary depending on the Internet browser they are using. For instance, when a document is selected through the Google Chrome browser, most likely the document will be displayed at the bottom of the browser dialog, with the option to click the arrow to view download options:



When a document is selected through the Internet Explorer browser, most likely the document will open in a separate browser tab/window and a pop-up prompting the patient for the next steps may be displayed:



My Account:

The My Account page allows a user to change the email address associated with the PatientPortal as well as their password. A valid email is not required for Administrator accounts, however they are required for patient accounts.

To change the email, enter the updated email address in the “New email” field and click “Change email”.

To change the password, enter the updated password in both the “New password” and “Confirm new password” fields and click “Change password”.

The patient can also see the activity that has occurred (by them or their authorized representative) on their account by clicking “Activity History Log” from the left navigation pane. Administrators do not have this option.

The screenshot shows a web browser window displaying the Patient Portal for STI Medical Practice. The browser's address bar shows the URL <https://www.chartmakerpatientportal.com/>. The page header includes the practice name "STI Medical Practice" with the phone number "(315) 246-8754" and a user profile for "mpatient2" with links for "My account" and "Sign out". A navigation bar contains links for Home, Patient, Messages, Documents, Clinical Summaries, and Lab Reports. On the left, a sidebar lists "Account Maintenance" (selected) and "Activity History Log". The main content area is titled "Account Maintenance" and contains two sections: "Change Email" and "Change Password". The "Change Email" section shows the "Current email" as "mpatient@gmail.com" and a text input field for the "New email", with a "Change email" button below. The "Change Password" section has three text input fields for "Current password", "New password", and "Confirm new password", with a "Change password" button below. At the bottom of the page, there is a link "How to use your patient portal" on the left and a footer on the right stating "Powered by ChartMaker® PatientPortal" and "Server Time: 07/17/2014 10:32:35".

Sign Out:

The Sign Out link will sign the user out of the PatientPortal and redirect them back to the Log On page.

ADMINISTRATORS ONLY

Patients:

The Administrator's "Patients" page will have a list of all registered patients and patient representatives with the option to reset their password if necessary. This page also gives the Administrator the ability to send a broadcast message to all registered patients by clicking in on the "Announcements" link.

To reset a patient or patient representative's password, click "Reset Password" and then "Yes" to confirm. An email notification will be sent to the patient or patient representative with their new password.

NOTE: Patients can reset their own password by going to the "My Account" page. Administrator assistance is only necessary if the patient forgets their username and/or their security question.

To send a broadcast message, click "Announcements" from the left navigation pane, type a Subject and Message and then click "Send". The message will be sent to all registered PatientPortal users (including patient representatives).

NOTE: Broadcast messages will even be sent to patients that have been suspended (i.e. the patient's PatientPortal button appears red in Practice Manager and Clinical).

The screenshot displays the PatientPortal interface for STI Medical Practice. The top navigation bar includes links for Home, Patients, Documents, and Settings. The left sidebar contains links for Patients, Patient Representatives, and Announcements. The main content area shows a list of patients with columns for Name, Account #, Date of Birth, Username, Email Address, and a Reset Password link. The list includes 10 entries, with a search bar and a 'Showing 1 to 10 of 17 entries' indicator at the bottom.

Name	Account #	Date of Birth	Username	Email Address	Reset Password
Elmes, Georgette	10019	06/15/1989	Georgette Elmes	gelmes@sticomputer.com	Reset Password
Ent, Pat	10021	06/11/1970	Pent	dcassidy@sticomputer.com	Reset Password
Farley, Sarah	100003	11/01/1990	sfarley	sfarley@sticomputer.com	Reset Password
Frankenreiter, Petra	10062	11/01/1957	pfrankenreiter	csproul@sticomputer.com	Reset Password
Lindhome, Jonathan	10013	01/01/1990	serith	jlindhome@sticomputer.com	Reset Password
Marble, Ken	10029	01/01/1980	kmarble	kmarble@sticomputer.com	Reset Password
Marble, Ken	10015	06/21/1981	kmarble2	kmarble@sticomputer.com	Reset Password
McClane, John	10012	01/01/1980	John McClane	gelmes@sticomputer.com	Reset Password
Mouse, Mickey	10027	06/11/1970	dmmouse	dcassidy@sticomputer.com	Reset Password
O'Dwyer, Declan	10065	09/10/2012	dodwyer	csproul@sticomputer.com	Reset Password

Showing 1 to 10 of 17 entries

Powered by ChartMaker® PatientPortal
Server Time: 07/17/2014 10:57:26

Settings:

The Settings page will allow the Administrator to configure the overall theme of the PatientPortal, practice information, and various message details. They will also be able to turn on maintenance mode and/or configure the data delay interval. Specifics for each page are detailed below.

General:

- **Practice Title:** Practice Name, which will appear on the masthead
- **Practice Phone Number:** Appears under the Practice title
- **Practice Logo:** An image file 200 KB or less which will be positioned to the left of Practice Title. Click “Browse” to search for and upload a file
- **Portal Theme:** Set the color scheme for the Portal selecting from the 13 pre-configured options. You will see the change take affect once you click “Save”.
- **Patient Data Delay:** Configuration used to batch demographic updates before the information is sent to the Health Portal (in case of multiple updates by patient). The default is 30 minutes and can be changed, however it is suggested to keep a longer interval if possible. This configuration only affects demographic information and not messages sent by the patient.
- **Enable Maintenance Mode:** Check the box to suspend the ability for any user to log into the PatientPortal. Patients can still be authorized and/or complete registration, however they will receive a “this site is under maintenance, please check back later” webpage when attempting to log in.

The screenshot displays the 'Settings' page for 'STI Medical Practice'. The page is accessed via a web browser at the URL 'https://www.chartmakerpatientportal.com/P...'. The header shows the practice name and phone number. The navigation bar includes links for Home, Patients, Documents, and Settings. The left sidebar lists various settings categories. The main content area is titled 'Set up your Practice main page' and contains several configuration options: Practice title (STI Medical Practice), Practice Phone Number ((315) 246-8754), a logo upload button (Browse...), a Portal theme dropdown (STI Default), a Patient data delay input (1 minutes), and an unchecked checkbox for 'Enable maintenance mode'. A 'Save' button is located at the bottom right of the form. The footer includes a 'Terms of Use' link and a note about the system being powered by ChartMaker® PatientPortal.

Click “Save” to accept any changes made before navigating to a different page.

Welcome Message:

The Welcome Message page allows an Administrator to configure the text that will appear on the main page of the PatientPortal when a patient logs in. Examples of information that could be displayed here would be (but not limited to): reminders to call 911 in case of emergency and not to use the PatientPortal, practice hours and/or contact information or basic instructions on how to navigate the Portal. This information is not patient-specific and will be seen by all registered patients and/or patient representatives. There is a text limit of 512 characters.

To see what the Welcome Message will look like prior to finalizing, click “Preview”.

NOTE: You may have to allow pop-ups in your browser to view a preview of this page.

Click “Save” to accept any changes made before navigating to a different page.

The screenshot shows a web browser window with the URL <https://www.chartmakerpatientportal.com/Practice/WelcomeMessage>. The page is titled "STI Medical Practice" with a phone number "(315) 246-8754". The user is logged in as "sticomputer" with options for "My account" and "Sign out". The navigation menu includes "Home", "Patients", "Documents", and "Settings". The left sidebar has links for "General", "Welcome Message" (selected), "Provider List", "Message Settings", and "Patient Terms of Use". The main content area is titled "Welcome Message" and contains the following text:

The following message will be presented to the patient when they visit their home page.

You may use the link at the bottom to preview your changes before you save them. Previewing will open a new window showing you how the patient will view the content of the page.

Welcome message

Welcome to PatientPortal!
<http://www.sticomputer.com>>Visit Our Website

Hours of Operation*:

Mon: 8AM-5PM
Tue: 8AM-5PM
Wed: Closed
Thu: 8AM-5PM
Fri: 8AM-3PM
Sat: 8AM-2PM
Sun: Closed



At the bottom of the main content area, there are links for "Preview" and "Save". The footer includes a link for "Terms of Use" and a note: "Powered by ChartMaker® PatientPortal Server Time: 07/22/2014 04:41:11".

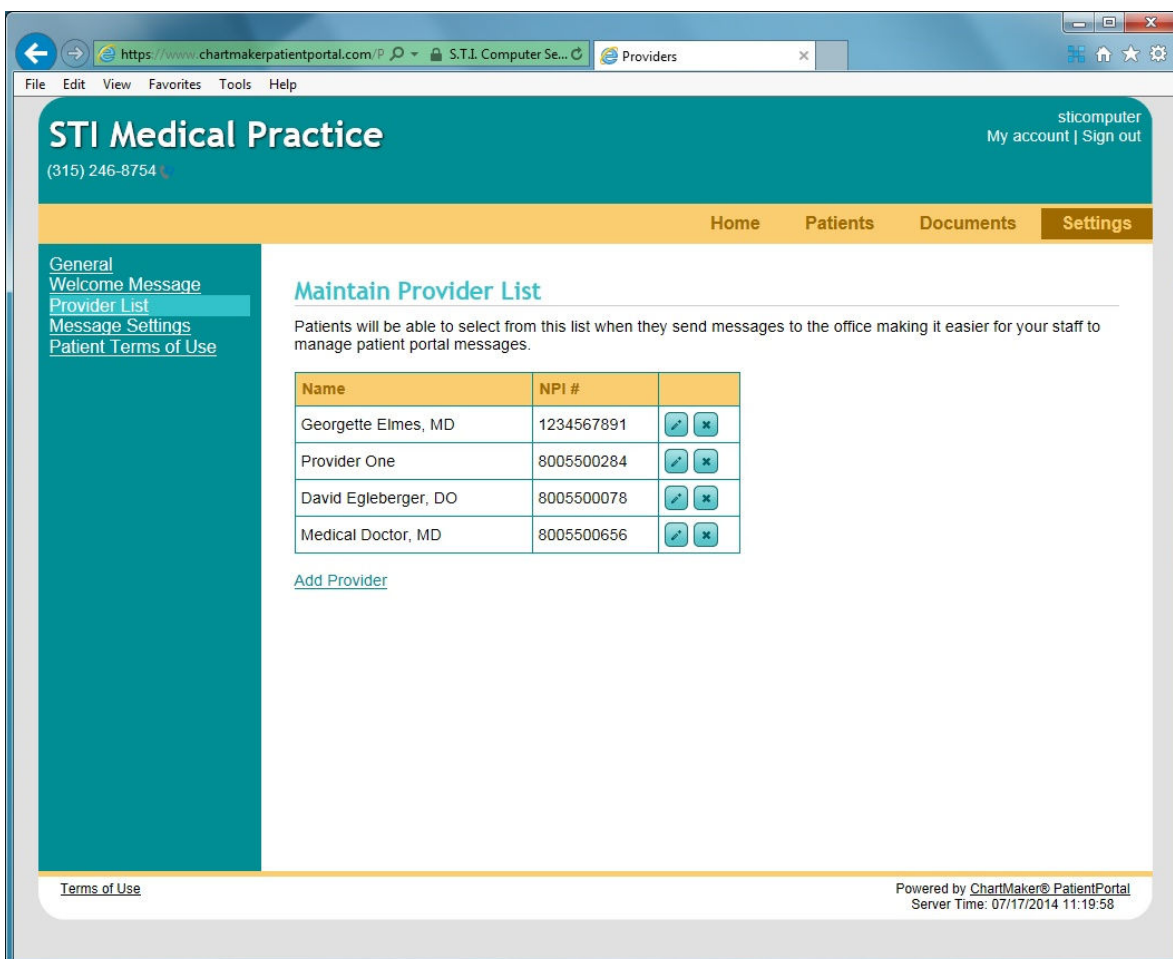
Provider List:

The Provider List page allows an Administrator to maintain a list of providers that will be utilizing the PatientPortal. The list created here will be the list of providers displayed to the patient when attempting to send a message through the Portal.









NOTE: This list is not linked to Practice Manager/Clinical so if you add a Provider you must remember to manually add them to the PatientPortal as well.

To add a new provider, click “Add Provider”. Enter their Name, NPI # and click “Save”. **NPI is required** in order to save the information.

To modify provider information, click “Edit” (). To remove a provider from the list, click “Delete” (.



The screenshot shows a web browser window with the URL <https://www.chartmakerpatientportal.com/P>. The page title is "STI Medical Practice" with the phone number "(315) 246-8754". The user is logged in as "sticomputer" with options for "My account" and "Sign out". The navigation bar includes "Home", "Patients", "Documents", and "Settings". The left sidebar lists "General", "Welcome Message", "Provider List" (highlighted), "Message Settings", and "Patient Terms of Use". The main content area is titled "Maintain Provider List" and includes a description: "Patients will be able to select from this list when they send messages to the office making it easier for your staff to manage patient portal messages." Below this is a table with four providers, each with an "Edit" and "Delete" icon.

Name	NPI #	
Georgette Elmes, MD	1234567891	 
Provider One	8005500284	 
David Egleberger, DO	8005500078	 
Medical Doctor, MD	8005500656	 

[Add Provider](#)

Powered by [ChartMaker® PatientPortal](#)
Server Time: 07/17/2014 11:19:58

Message Settings:

The Message Settings page allows an Administrator to customize the descriptive text that appears below each message type. This information will be displayed on the “Messages” page that is accessed by a Patient.

To see what the Messages page will look like prior to finalizing, click “Preview”.

NOTE: You may have to allow pop-ups in your browser to view a preview of this page.

To restore the text back to the original pre-configured text provided by STI, click “Restore default” (🔄) next to the applicable message type.

Click “Save” to accept any changes made before navigating to a different page.

The screenshot shows a web browser window with the URL <https://www.chartmakerpatientportal.com/P>. The page title is "STI Medical Practice" with a phone number "(315) 246-8754". The user is logged in as "sticomputer" with options for "My account" and "Sign out". The navigation menu includes "Home", "Patients", "Documents", and "Settings". The left sidebar lists "General", "Welcome Message", "Provider List", "Message Settings" (highlighted), and "Patient Terms of Use". The main content area is titled "Message Settings" and contains the following sections:

- Message instructions:** A text box containing the message: "We are offering a way for you to communicate to our office via secured messaging. This is not intended to be used for urgent communications. Please be sure to include the provider you normally see and a phone number where you can be reached. We will respond as soon as possible." Below the text box is a "Restore default" button (🔄) and a "Select a message type from the list below." instruction.
- Appointment requests:** A text box containing the message: "Use this option to request a future appointment. Be sure to include your preferred date(s) and time(s) along with the provider that you wish to see. For appointments within the next 24 hours please call our office." Below the text box is a "Restore default" button (🔄).
- Refill requests:** A text box containing the message: "Use this option if you need a refill on a medication that our office has prescribed for you. Be sure to include medication name, dosage, pharmacy name and pharmacy phone number in your message. Please allow a minimum of 48 hours for our office to process this request." Below the text box is a "Restore default" button (🔄).
- Billing questions:** A section header with a "Restore default" button (🔄) below it.

Patient Terms of Use:

The Patient Terms of Use page allows an Administrator to customize the Authorization Agreement text the patient accepts prior to finalizing registration and begin using the PatientPortal.

By default, the PatientPortal will come with a generic Authorization Agreement that should be modified for your practice.

After customizing the text, click the box for “I accept responsibility for the patient authorization agreement provided below.”

Click “Save” to accept any changes made before navigating to a different page.

The screenshot shows a web browser window with the URL <https://www.chartmakerpatientportal.com/P>. The page title is "STI Medical Practice" with the phone number "(315) 246-8754". The user is logged in as "sticomputer" with options for "My account" and "Sign out". The navigation bar includes "Home", "Patients", "Documents", and "Settings". The left sidebar has links for "General", "Welcome Message", "Provider List", "Message Settings", and "Patient Terms of Use" (which is highlighted). The main content area is titled "Patient Authorization Agreement". It contains a checkbox labeled "I accept responsibility for the patient authorization agreement provided below." which is checked. Below this is a text area containing the following text:

Patient Portal Authorization Agreement STI Computer

In the event of an emergency dial 911.
Do not use the Patient Portal.

What is the Patient Portal?
The Patient Portal is a web-based system that allows for secure communication and transfer of information between STI Computer and the patient.

Purpose of this Authorization
STI Computer offers a Patient Portal that provides secure electronic access to your medical health information and secure electronic communications between our office and you for those patients who wish to participate. Secure messaging can be a valuable communications tool, but certain precautions should be used to minimize risks. In order to manage these risks we have imposed some terms and conditions of participation. Your acceptance on this form will demonstrate that you have been informed of these risks and the conditions of participation and that you accept the risks and agree to the conditions of participation.

How the Secure Patient Portal Works
A secure web portal is a webpage that uses encryption (a form of electronic security) to keep unauthorized persons from reading communications, information, or attachments. Secure messages and information can only be read by someone who knows the right username and password to log in to the Patient Portal site. Our Patient Portal provides a secure method of messaging to ensure your privacy is in compliance with Federal and State regulations.

After logging in to the Patient Portal you can:
* Use the messaging function to communicate with office staff

At the bottom right of the text area is a "Save" button.

PATIENTS ONLY

Patient:

The Patient page allows a patient (or patient representative) to modify their demographic and medical information. The patient can modify their information either by expanding the sections using the arrows (➡) in the main navigation pane and then clicking “Edit” or by clicking on the appropriate link from the left navigation pane.

Information that can be modified includes: General (contact) Information, Additional (demographic) Information, Responsible Party, Employment Information, Insurance Emergency Contacts, Physicians, Preferred Pharmacy, Medications, Allergies, Patient History, Surgical History and Family History.

Fields marked with an asterisk (*) are required. For existing Phone, Insurance, Emergency Contact, Physician, Medications, Allergies, Surgical History and Family History information, a user can modify the information by clicking “Edit” (✎). To remove information, click “Delete” (✕).

Click “Save” to accept any changes made before navigating to a different page.

NOTE: The patient will need to click “Send Now” (There are unsent changes. [Send now.](#)) after they are done making changes in order for the information to be sent to the Health Portal.

The screenshot displays the STI Medical Practice Patient Portal. The header includes the practice name, phone number, and user account information. A navigation bar contains links for Home, Patient, Messages, Documents, Clinical Summaries, and Lab Reports. The left sidebar lists various information categories for editing. The main content area, titled 'Patient Information', contains a form for 'General Information' with fields for Name, Nickname, Address, and Phone numbers. Below this is a list of expandable sections for Additional Information, Responsible party, Employment information, Insurance, Emergency contacts, Physicians, Preferred pharmacy, Medications, Allergies, Patient history, Surgical history, and Family history. Each section has an 'Edit' button. The footer includes a link to 'How to use your patient portal' and server information.

STI Medical Practice
(315) 246-8754

mpatient2
My account | Sign out

Home Patient Messages Documents Clinical Summaries Lab Reports

Summary
General Information
Additional Information
Responsible Party
Employment Information
Insurance
Emergency Contacts
Physicians
Preferred Pharmacy
Medications
Allergies
Patient History
Surgical History
Family History

Patient Information

Please enter all your patient information in the pages provided. Once complete, use the link provided at the top of the page to send your information to the office.

General Information

Name: Mary Patient Address: 900 Main Street
Nickname: Eagleville, PA 19403
Phone numbers:
(215) 555-1212 Home

Edit

Additional Information

Responsible party
Employment information
Insurance
Emergency contacts
Physicians
Preferred pharmacy
Medications
Allergies
Patient history
Surgical history
Family history

How to use your patient portal

Powered by ChartMaker® PatientPortal
Server Time: 07/17/2014 12:09:23

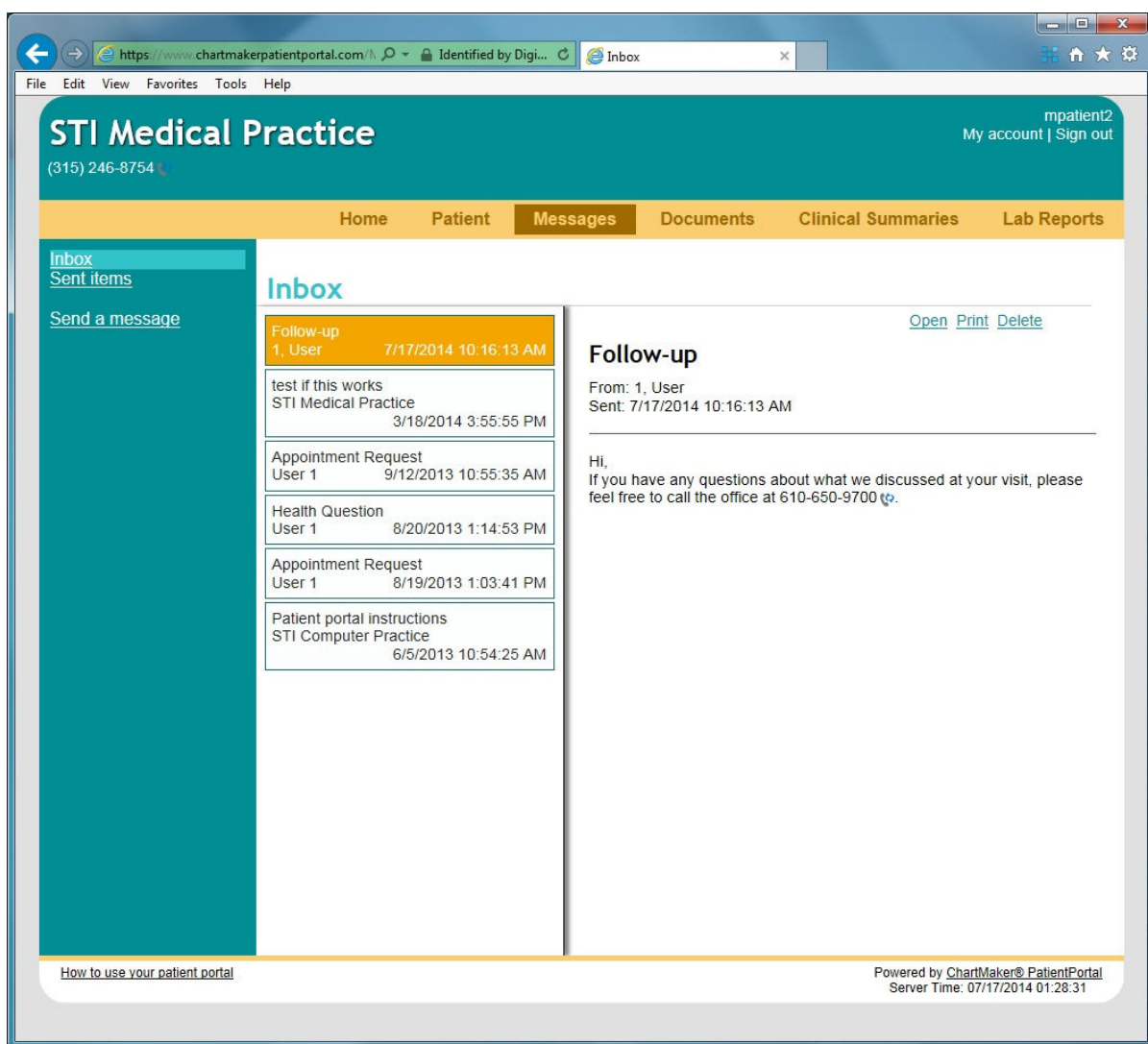
Messages:

The Messages page allows the patient (or patient representative) to view, print, delete and send secure messages to the practice. Messages generated from this page will be sent to the users configured for the respective Distribution Lists, which are set up through Practice Manager or Clinical. See the section on “Configuring Message Distribution Lists” from within the Appendix on page 25 for more information.

To open the selected message in a separate browser window, click “Open”. To print the selected message, click “Print”. To delete the selected message, click “Delete”.

To view messages sent from this patient to the practice, click “Sent items” from the left navigation pane.

To send a new message to the practice, the patient will click “Send a message” from the left navigation pane. They will then click the applicable message type, select the Provider, enter a phone number for contact purposes, the message and then click “Send”.



Clinical Summaries:

The Clinical Summaries page allows the patient (or patient representative) to view, print, download or delete the clinical summary sent to the PatientPortal for each office visit. The list of clinical summaries located in the left navigation pane will be organized by date, with the most recent being at the top.

ChartMaker® Clinical will automatically send the Clinical Summary to the PatientPortal upon note signing for any registered patient that is not in suspended mode. (See the section on “Suspending Data Export” from within the Appendix on page 27 for more information.) This will automatically give the provider credit for the Core Meaningful Use measure.

To open the selected clinical summary in a separate browser window, click “Open”. To print the selected clinical summary, click “Print”. To save the selected clinical summary locally, click “Download”. To delete the selected clinical summary, click “Delete”.

The screenshot shows a web browser window displaying the 'Clinical Summaries' page for 'STI Medical Practice'. The page has a teal header with the practice name and phone number, and a navigation bar with links to Home, Patient, Messages, Documents, Clinical Summaries (active), and Lab Reports. On the left, a list of clinical summaries is shown, with the most recent one highlighted: '7/17/2014 10:40:10 AM'. The main content area displays the details for this visit, titled 'Summary of Today's Visit for Mary Patient'. It includes patient information (DOB, Sex, Race, Ethnicity, Preferred Language), a list of vital signs (Temp, BP, Ht, Wt, BMI), smoking status, problem list, medications, allergies, and a section for medications administered. The page is powered by ChartMaker® PatientPortal and shows a server time of 07/17/2014 01:58:42.

STI Medical Practice
(315) 246-8754

mpatient2
My account | Sign out

Home Patient Messages Documents **Clinical Summaries** Lab Reports

Clinical Summaries

7/17/2014 10:40:10 AM
3/11/2014 2:48:48 PM
3/7/2014 10:56:28 AM

[Open](#) [Print](#) [Download](#) [Delete](#)

STI University Medical, 2700 Van Buren Ave., Eagleville, PA, 19403-2341, (610)650-9700

Summary of Today's Visit for Mary Patient

DOB: 05/10/1968, **Sex:** Female, **Race:** White, **Ethnicity:** Not Hispanic or Latino, **Preferred Language:** English
07/17/2014 visit with Medical Doctor at STI University Medical

Chief Complaint/Reason for Visit The information normally provided in this section is not applicable to today's visit.

Vital signs

Temp:	BP:	Ht:	Wt:	BMI:
98.6F	118/87 mmHg	5ft, 4in	117lbs	20.081

Smoking Status: Former smoker. Started: 2000

Problem List
BENIGN HYPERTENSION (401.1)
ROUTINE MEDICAL EXAM (V70.0)
ABDOM PAIN GENERALIZED (789.07)

Medications
Continue: no active medications

Allergies
No Known Allergies

Medications Administered The information normally provided in this section is not

[How to use your patient portal](#)

Powered by **ChartMaker® PatientPortal**
Server Time: 07/17/2014 01:58:42

NOTE: As of 5.4, Clinical Summary documents will collect information based on a selected note and not by which notes have the same visit date.

Lab Reports:

The Lab Reports page allows the patient (or patient representative) to view, print, download or delete any lab information sent to the PatientPortal. The list of lab reports located in the left navigation pane will be organized by date, with the most recent being at the top.

ChartMaker® Clinical will automatically send the lab report to the PatientPortal upon signing of the lab report (or chart note including lab values) for any registered patient that is not in suspended mode. (See the section on “Suspending Data Export” from within the Appendix on page 27 for more information.)

To open the selected lab report in a separate browser window, click “Open”. To print the selected lab report, click “Print”. To save the selected lab report locally, click “Download”. To delete the selected lab report, click “Delete”.

The screenshot displays the PatientPortal interface for STI Medical Practice. The top navigation bar includes links for Home, Patient, Messages, Documents, Clinical Summaries, and Lab Reports. The Lab Reports section is active, showing a list of reports on the left and a detailed view of a report for Mary Patient on the right. The detailed view includes patient information, lab results, and a footer with a link to 'How to use your patient portal' and server information.

STI Medical Practice
(315) 246-8754

mpatient2
My account | Sign out

Home Patient Messages Documents Clinical Summaries **Lab Reports**

Lab Reports

7/18/2014 1:09:17 PM
7/18/2014 12:39:15 PM

[Open](#) [Print](#) [Download](#) [Delete](#)

STI University Medical, 2700 Van Buren Ave. , Eagleville, PA, 19403-2341, (610)650-9700

Lab Report 07/18/2014
Mary Patient

DOB:05/10/1968, **Sex:**Female, **Race:**White, **Ethnicity:**Not Hispanic or Latino, **Preferred Language:** English

Results
COLOR,UR: Yellow
APPEARANCE,UR: Clear
SPECIFIC GRAVITY,UR: 1.011
LEUK ESTERASE,UR: TRACE
NITRITES,UR: NEG
PH,UR: 6
PROTEIN,UR: NEG
GLUCOSE,UR: NORM
KETONES,UR: NEG
BLOOD,UR: 1+
RBC,UR: None Seen
WBC,UR: 1 /hpf
WBC CLUMPS,UR: cancelled
BACTERIA,UR: 1+
HYALINE CASTS,UR: 5 /lpf
GRANULAR CASTS,UR: cancelled
WAXY CAST,UR: cancelled
SQUAMOUS EPITH,UR: 1+
TRANS EPITH,UR: cancelled
RENAL EPITH,UR: cancelled

[How to use your patient portal](#)

Powered by **ChartMaker® PatientPortal**
Server Time: 07/18/2014 01:20:25

NOTES: Lab results will be sent to the PatientPortal upon signing. “Appropriately configured” lab results refers to the lab condition being designated as a Type of “Lab” with an applicable LOINC code attached as well. Lab conditions are configured by going to Edit > System Tables > Conditions > Results. After you find the applicable lab condition, highlight it and click “Properties”.

- In 5.1 and below, all appropriately configured lab results will be displayed under the “Clinical Summaries” page.
- In 5.2 and 5.3, if lab results are received electronically (via an interface), the lab results will be displayed under the “Lab Reports” page. If lab results are manually entered into a ChartMaker® Clinical note (and appropriately configured), the lab results will be displayed under the “Clinical Summaries” page.
- In 5.4 and beyond, if lab results are received electronically (via an interface), the lab results will be displayed under the “Lab Reports” page. If lab results are manually entered into a ChartMaker® Clinical note that does *not* contain any additional information within it (i.e. medications, allergies, diagnoses, etc.), the lab results will be displayed under the “Lab Reports” page. If lab results are manually entered into a ChartMaker® Clinical note that *does* contain additional information (i.e. medications, allergies, diagnoses, etc.), the lab results will be displayed under the “Clinical Summaries” page. Scanned lab results will be displayed on the PatientPortal under the “Other Information” page and will be labeled as “Health Information Updates”.

Appendix

ANNOUNCEMENT TEMPLATE

In order to aid in the patient engagement process, STI has created a generic template that could be used to announce the launch of your practice's PatientPortal site. This template is a Microsoft Word document and should be modified before using for your practice. **In the least, all the text in red should be replaced.**

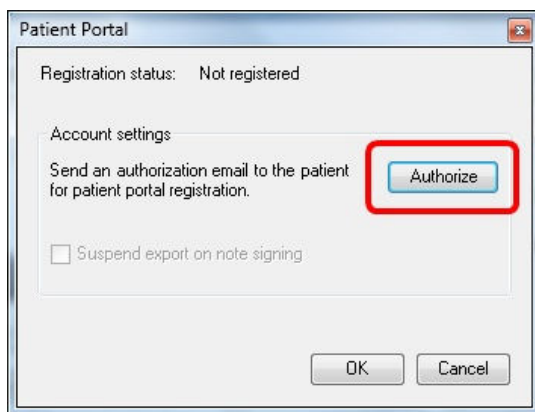
To access the template:

1. Go to www.sticomputer.com
2. Click "CUSTOMERS" and login
3. Click "PatientPortal" from the left navigation pane
4. Under the Training and Help Documents section, click "PatientPortal Announcement Template"

ALTERNATIVE METHOD: After step 2, click "Help Documents" and then under the Meaningful Use (2014) section, click "PatientPortal Announcement Template".

AUTHORIZING A PATIENT FOR THE PATIENTPORTAL

1. In Practice Manager, open the patient's account through the Patient tab
2. Click "Patient Portal"
3. Click "Authorize"



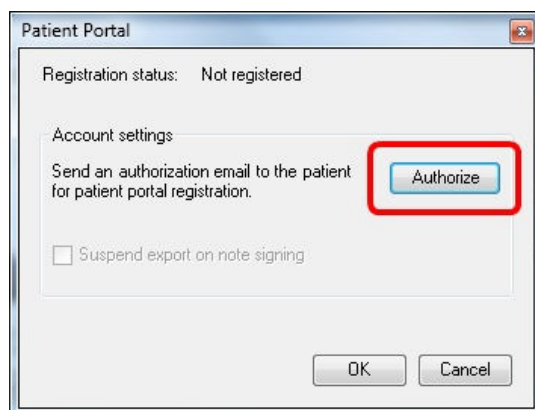
4. Click "OK"

NOTE: An email notification will be sent to the patient (to the email documented on the Patient tab) requesting that they complete the registration process. The patient must click on the link and complete the registration form before they can access their health information on the Portal. In versions 5.2 and below, do not attempt to authorize patients that have the "NEW" prefix in their account number.

RE-AUTHORIZING A PATIENT FOR THE PATIENTPORTAL

If the registration email needs to be sent again, this can be done at any point while the PatientPortal button is still yellow by clicking the “Authorize” button again.

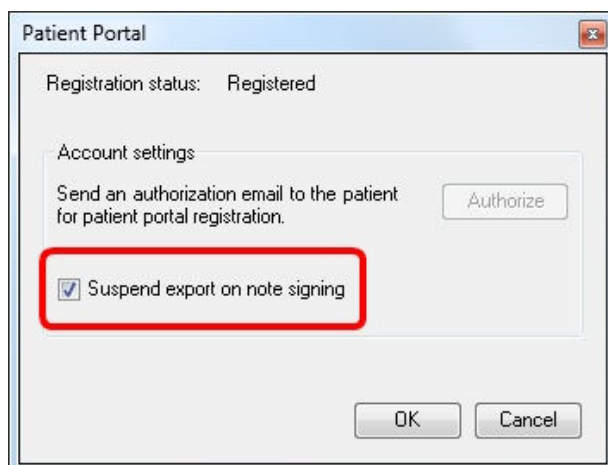
If the patient would like the registration email to be sent to a different email address from the original request, change the email address *first* in Practice Manager and then click “Authorize” again.



SUSPENDING DATA EXPORT

To stop the automatic export of patient information (clinical summaries, lab data, etc.):

1. In Practice Manager, open the patient's account through the Patient tab
2. Click “Patient Portal”
3. Click “Suspend export on note signing”



4. Click “OK”

NOTE: The PatientPortal button will appear red in Practice Manager and Clinical if the patient's data export has been suspended. To unsuspend the export, uncheck the box for “Suspend export on note signing” and click “OK”.

AUTHORIZING A PATIENT REPRESENTATIVE

Patient Representatives can be added to a patient's chart at any time however the patient must be registered on the PatientPortal prior to authorizing a representative for PatientPortal usage.

1. In Clinical, open the patient's chart
2. Click the "ID" tab
3. Click "Add" under the Patient Representative section
4. Enter the representative's information, including Email
5. Click "Enable representative for patient portal"
6. Click "OK"
7. Save and/or close the patient's chart

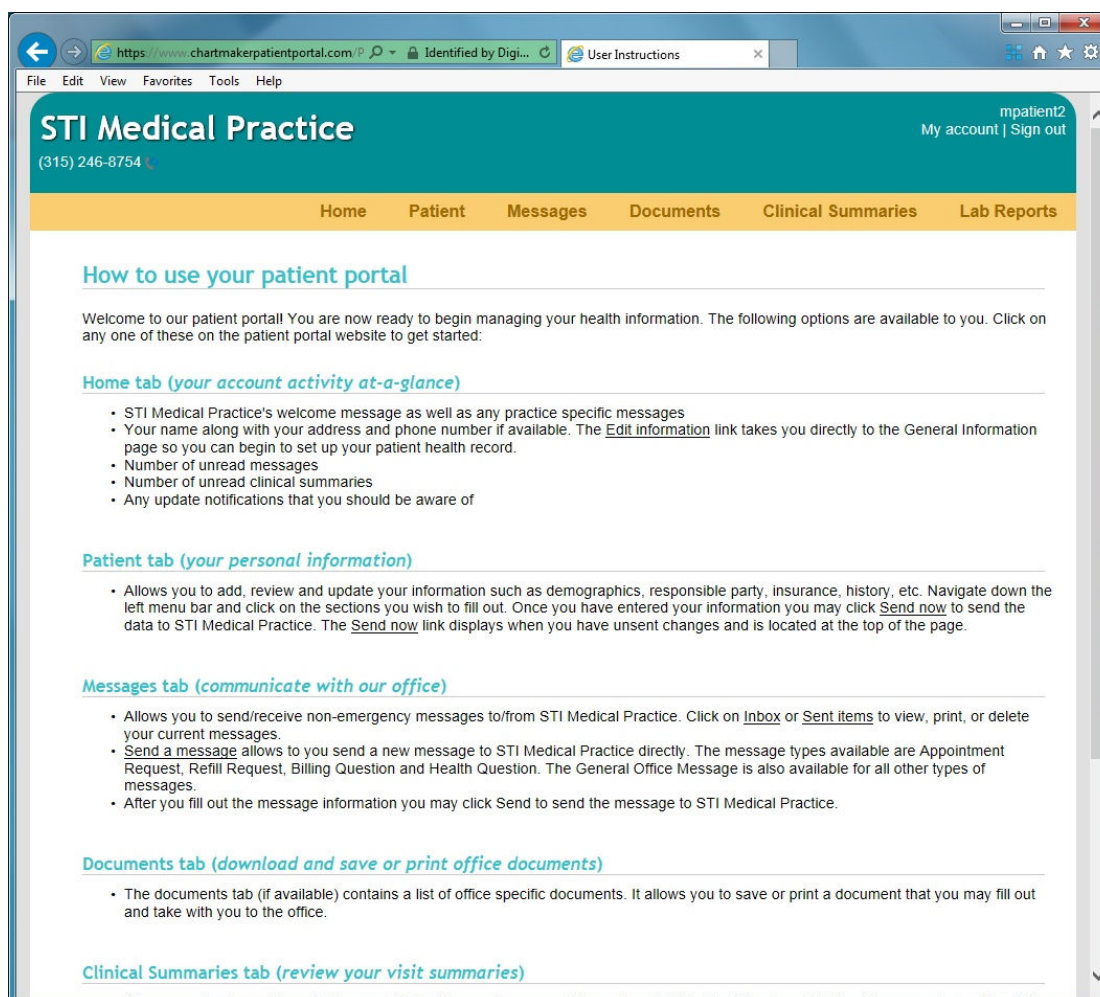
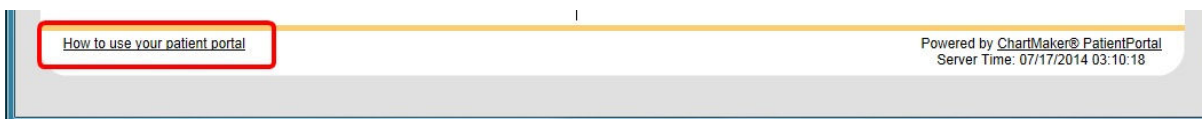
NOTE: A registration email will be sent to the patient representative. They must click on the link from within the email and complete registration before gaining access to the PatientPortal.

UPDATING THE EMAIL ASSOCIATED WITH A REGISTERED PATIENTPORTAL ACCOUNT

If the patient is already registered (i.e. PatientPortal button is green) and wants to update the email associated with their PatientPortal account, the patient must modify their email through the "My Account" page on the PatientPortal. Administrators can change the patient's email in Practice Manager/Clinical however this will not update the patient's PatientPortal account. See instructions regarding the "My Account" page for more information on how to update an email associated with a PatientPortal account.

PATIENTPORTAL USAGE INSTRUCTIONS

To view basic instructions on navigating the ChartMaker® PatientPortal, click “How to use your patient portal” from the bottom of the page. This option is only available for the patient (or patient representative), not Administrators.

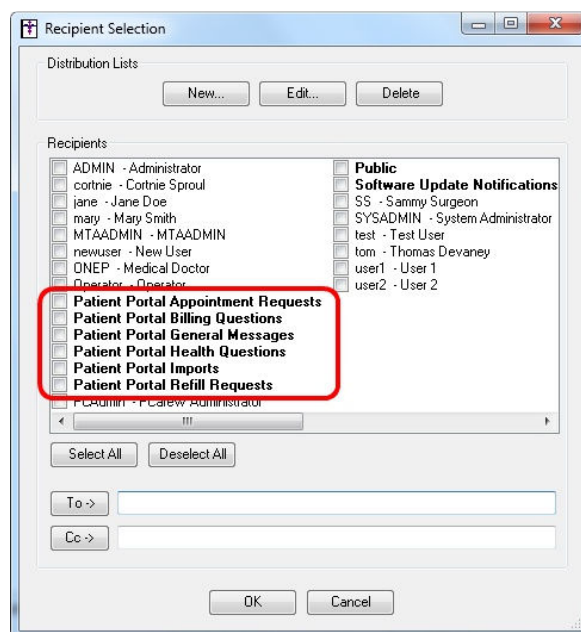


CONFIGURING MESSAGE DISTRIBUTION LISTS

Messages sent from the PatientPortal will appear on the To Do List in Clinical/Practice Manager for the users configured to receive that type of message. Distribution Lists are set up through the messaging dialog by completing the following steps:

1. Click “To-Do > New Message/Task...”
2. Click “To...”
3. Highlight the appropriate Distribution List

NOTE: Distribution Lists show as bolded text. The lists pertaining to the PatientPortal all start with “Patient Portal...”. Options includes: Appointment Requests, Billing Questions, General Messages, Health Questions, Imports and Refill Requests. These are system defaulted distribution lists and cannot be deleted



4. Click “Edit...”
5. Add/remove users as needed by clicking the checkbox next to their name
6. Click “Save”
7. Click “OK” or “Cancel”
8. Click “Cancel” to close the Message Details dialog

RESPONDING TO MESSAGES SENT FROM THE PATIENTPORTAL

To respond to a message that was sent via the PatientPortal:

1. Double-click on the message from the To-Do List

ALTERNATE METHOD: Highlight the applicable message and click “View”.

2. Click “Reply” and type your response

NOTE: You can save a copy of this message in the patient’s chart by selecting the “Yes and sign” option before proceeding to the next step.

3. Click “Send”

Reply

Patient: Mary Patient (10040)
Sent: 5/5/2014 2:22:25 PM
Type: Patient Portal Health Question
Contact #: (215) 333-4333

I have a question about my meds, can someone call me?

Sent by Mary Patient

Additionally save as Chart Note? ☒ No ☐ Yes ☐ Yes and sign ☐ Yes with template

Send Print Cancel

NOTES:

- If you elect to save the message to the patient’s chart, you will get a pop-up asking for you to name the note.
- See the section on “Configuring Message Distribution Lists” in the Appendix on page 25 for more information.
- Patients (or patient representatives) will receive an email notification regarding this activity once the message is sent.

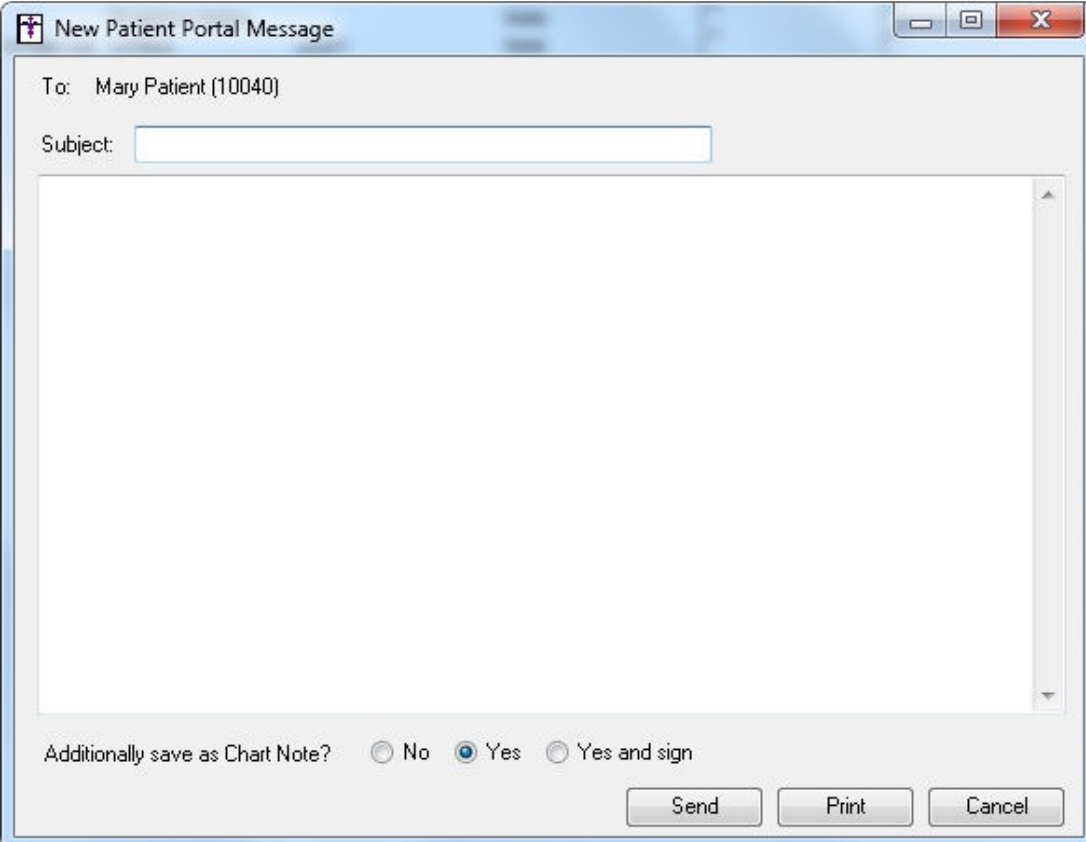
SENDING A MESSAGE TO THE PATIENTPORTAL

To send a message for the patient to view on the PatientPortal:

1. In Clinical, open the applicable patient's chart
2. Click "To-Do > New Patient Portal Message..."
3. Enter a Subject and Message

NOTE: You can save a copy of this message in the patient's chart by selecting the "Yes and sign" option before proceeding to the next step.

4. Click "Send"

A screenshot of a software dialog box titled "New Patient Portal Message". The dialog box has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside the dialog, there is a "To:" field with the text "Mary Patient (10040)". Below it is a "Subject:" label followed by an empty text input field. A large, empty text area for the message body is located below the subject field. At the bottom of the dialog, there is a section labeled "Additionally save as Chart Note?" with three radio button options: "No", "Yes" (which is selected), and "Yes and sign". To the right of these options are three buttons: "Send", "Print", and "Cancel".

NOTES:

- If you elect to save the message to the patient's chart, you will get a pop-up asking for you to name the note.
- Patients (or patient representatives) will receive an email notification regarding this activity once the message is sent.

PATIENTPORTAL REQUIREMENTS FOR MEANINGFUL USE

The Meaningful Use program requires all providers (Stage 1 or Stage 2) to begin using a Patient Portal starting in 2014 and beyond. The requirements vary depending on the stage the provider is completing. Below is a basic overview of what is required. Please reference the “2014 (Stage 1 or Stage 2) Meaningful Use User Manual” which can be found on www.sticomputer.com after clicking “CUSTOMERS”, logging in and going to the Help Documents section.

Stage 1 Requirement:

Objective:	Requirement:	Exclusions:	Accomplish in Clinical by...
View, Download and Transmit (Electronic Copy of Health Information)	More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (within 4 business days after the information is available to the EP) online access to their health information subject to the EP's discretion to withhold certain information.	Any EP who neither orders nor creates any of the information listed for inclusion as part of the measure, except for "Patient name" and "Provider's name" and office contact information.	<ul style="list-style-type: none">- ChartMaker® PatientPortal usage (Authorize patient through PatientPortal button on Patient tab in Practice Manager)- Note signing within 4 business days- Attaching SNOMED codes to applicable Diagnoses

SUMMARY: Patients must be “authorized” for the PatientPortal through Practice Manager and clinical notes should be signed within 4 business days.

Stage 2 Requirements:

Objective:	Requirement:	Exclusions:	Accomplish in Clinical by...
View, Download, Transmit (Patient Electronic Access)	<ul style="list-style-type: none"> - More than 50% of all unique patients seen are provided online access to their health information within 4 business days after the information is available to the EP. - More than 5% of all unique patients seen (or their authorized representatives) view, download or transmit to a third party their health information. 	Any EP who: (1) Neither orders nor creates any of the information listed for inclusion as part of both measures, except for "Patient name" and "Provider's name and office contact information, may exclude both measures. (2) Conducts 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period may exclude only the second measure.	<ul style="list-style-type: none"> - ChartMaker® PatientPortal usage (Authorize patient through PatientPortal button on Patient tab in Practice Manager; and Patient submitting Refill Request or Health Question through Messages menu on PatientPortal) - Note signing within 4 business days - Attaching SNOMED codes to applicable Diagnoses
Secure Electronic Messaging	A secure message was sent using the electronic messaging function of CEHRT by more than 5% of unique patients (or their authorized representatives) seen by the EP during the EHR reporting period.	Any EP who has no office visits during the EHR reporting period, or any EP who conducts 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period.	ChartMaker® PatientPortal usage (Message types of "Refill Request" or "Health Question" are the only two that will count)

SUMMARY: For the "View, Download, Transmit" measure, patients must be "authorized" for the PatientPortal through Practice Manager and clinical notes should be signed within 4 business days. Also, patients must interact with the PatientPortal by either viewing, downloading or transmitting their information to a third party. In order for the patient to accomplish this interaction, they must have completed registration. For the "Secure Electronic Messaging" measure, patients must send your practice appropriate secure messages originating through the PatientPortal.

Since ChartMaker® Clinical has the ability to auto-upload Clinical Summary and Lab Result information to the PatientPortal upon note signing, the benefit of PatientPortal usage goes beyond the two measures listed above.

TIPS FOR PATIENTPORTAL ENGAGEMENT

Patient Engagement is the act of motivating your patients to be more involved with their overall care and treatment plan through resources like Patient Portals with the aim of improving health outcomes, increasing provider-patient communication and lowering health care costs. Below are several suggestions as to how to get your patients more engaged:

- **Educate your staff:** By educating your staff on things like how to access the portal and having everyone convey the same message, you can be assured your patients will receive the instruction necessary to get involved. Create policies and procedures that should be adhered to by all employees.
- **Educate your patients:** Have the discussion at check-in or while in the exam room as to what information will be available to them on the PatientPortal. Also mention what type of communication is appropriate for them to be sending you through the PatientPortal (i.e. non-emergent questions).
- **Give them the resources to do it now:** By providing a private area with a computer for the patient to use to complete the registration process, *while still in your office*, will increase the chances significantly of it getting done. Plus once the registration process is complete, your office will be able to send electronic messages to the patient through the PatientPortal increasing the chances of the patient becoming more involved.
- **Utilize electronic messaging over a phone call:** Instead of calling the patient to inform them their lab results are back (for example), send them a secure message through the PatientPortal instead.
- **Advertise:** Post signs or instructional handouts that give step-by-step instructions to the patient regarding PatientPortal usage. These handouts should include information as to *why* using the PatientPortal is beneficial to them as well as navigation information. You could also include a statement on your office voice system (i.e. a “hold” message) informing them about the PatientPortal or giving them the contact information of who to call if they have questions about it.
- **Send them home with information:** Do not assume your patients will remember to register or use the PatientPortal after they leave the office. Send them home with a reminder, which should include step-by-step instructions as well as your contact information in case they have questions.
- **Use the Portal as a way to follow-up with your patients:** By sending the patient a secure message, you will increase the chances of the patient sending a message back to your office (getting you credit for Core Measure: Secure Electronic Messaging). This may also support the perception that your office truly cares about the well-being of its patients.
- **Get patient representatives involved:** Sometimes the patient is not interested or does not have the resources to access the portal but a trusted family member or friend may. Discuss the option of a patient representative accessing their information on behalf of the patient.

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Trainer: _____

Phone: _____

STI ChartMaker Clinical Support:

1-800-487-9135 (Option 1, then Option 2)

NOTES:

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Document Change Log

Date	Version	Changes
7/23/14	5.x	Initial Release