Greenway Patient User Help Guide

Greenway Patient Portal

Greenway Patient Messaging

version 3.20

Confidential

12/19/2016

For more information about Greenway, please contact us on the Web at

www.greenwayhealth.com

To provide feedback or request changes to a document, send an e-mail to *documentationfeedback@greenwayhealth.com*. In your message, be sure to include the title and date of the document (listed above).

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Table of Contents

Greenway Patient User Help Guide 1

The Basics 1

1 | Introduction 2

Products 2
Key Terms 2
Feature Highlight: User Roles 3
Supported Browsers 3
Desktop 3
Mobile 4
System Requirements 4

2 | The Admin Dashboard and Your Account Information 5

About the Admin Dashboard 5
Managing Your Account: Name, Email, and Password 6
How to Get Here 6

3 | About Greenway Patient Messaging 7

Key terms 7

4 | About Greenway Patient Portal 8

Features 8
Meaningful Use 9

Managing Users: Patients and Staff 11

5 | Practice Users and Patients: An Overview 12

6 | Managing Practice Users 13

How to Get Here 13
Adding Practice Users 13
Editing a User's Details and Access Rights 14
Resetting a Practice User's Password 14
Deleting a Practice User 14

7 | Adding and Editing Practice Users 15

How to Get Here 15
Entering Account Details 15
Account Details 15
Staff Access vs. Admin Access 16

8 | Patient Portal Accounts 17

How to Get Here 17
Searching for Users 18
Viewing a Patient Portal User's Details 18
Editing User Information 19
Linking and Unlinking Patients 19
Resetting a Patient's Password 19

Reporting and the Activity Center 21

9 | Activity Center Overview 22

Generated Notifications *22*
How to Get Here *22*
Reading the Generated Notifications Logs *23*
Actions *23*
Organizing the List *24*
Grouping by Columns *24*
Moving Columns *24*
Filtering Entries in the List *24*
Exporting the Report *25*
10 | Portal Activity 26
How to Get Here *26*
Reading the Portal Activity Logs *26*
Organizing the List *27*
Grouping by Columns ..... ***Error! Bookmark not defined.***
Grouping by Columns *27*
Moving Columns *27*
Filtering Entries in the List *27*
MyHealthRecord.com Portal Configuration 29
11 | Configuring the Portal 30
How to Get Here *30*
12 | Practice Information 31
How to Get Here *31*
13 | Providers 32
How to Get Here *32*
14 | Appointment Locations 33
How to Get Here *33*
15 | Appointment Preferences 34
How to Get Here *34*
16 | Appearance 35
How to Get Here *35*
Picking a Color Scheme *35*
The Portal Logo *36*
Uploading Your Logo *36*
Picking a Color Scheme Using a Hexadecimal Color Code *37*
Picking a Color Scheme Using the Color Slider *37*
Logo Design Tips *37*
Use Logos With *38*
Avoid Using Logos With *38*
Uploading Your Logo *38*
17 | Disclaimer 39
How to Get Here *39*
18 | Prescription Refills 40
How to Get Here *40*
19 | Enable Connections 41

How to Get Here *41*
TransFirst vs Third Party Solutions *41*
Integration *41*
Security *42*
Tasks *42*
Connecting to TransFirst *42*
Using a Third Party Billing Solution *42*
Turning Bill Pay Off *43*
Using the MyHealthRecord.com Patient-Facing Portal 45
20 | Using the Portal 46
How to Get Here *46*
Sections *46*
21 | My Health 47
22 | My Messages 50
23 | My Appointments 51
24 | My Profile 52
25 | Pay My Bill 53
If Your Practice Uses TransFirst *53*
If Your Practice Uses a Third Party for Payments *54*
TransFirst Payment Workflow *54*
Step 1: User Payment *54*
Step 2: Success Message and Receipt *56*
Step 3: Tasks *57*
MyHealthRecord.com and Greenway Patient Portal Frequently Asked Questions 59
26 | Greenway Patient Portal FAQ for Practice Users 60
27 | MyHealthRecord.com Patient-Facing Portal FAQ 61
General *61*
Medical and Health Records *61*
Updating My Information *62*

The Basics

1 | Introduction

Greenway Patient is the online management platform used by practices running Greenway Health products for patient engagement. This guide is intended for use by practices using Greenway Patient Portal and/or Greenway Patient Messaging. It is designed as both an educational resource and a reference guide.

You can find Greenway Patient by going to MyHealthRecord.com and logging in using your practice staff or practice administrator credentials.

Products

Greenway Patient houses the following products, all unified under one Admin Dashboard, each of which handles a different aspect of the patient engagement experience.

- **Greenway Patient Portal:** The patient portal solution provided to your practice by Greenway Health. Manages your portal, including secure messaging, payments, and the review of health information.
- **Greenway Patient Messaging:** The automated patient notification solution provided to your practice by Greenway Health. Manages automated communications with patients, triggered by events in your EHR.

Some Greenway Patient tools are shared between products, while others are specific to each. Topics in this guide will indicate which products and users are affected. See *Staff Access vs. Admin Access* for details.

Key Terms

- **Practice User:** Any member of your practice who has access to Greenway Patient Portal or Greenway Patient Messaging.
- **Admin:** Any practice user with an *Admin* role. See Adding and Editing Practice Users for details.
- **Staff:** Any practice user with a *Staff* role. See Adding and Editing Practice Users for details.
- **Practice Administrator Account:** The primary administrative login, created by Greenway at implementation (e.g., administrator@practicename).
- **Greenway Patient Admin Dashboard:** This is what practice users see when they log into MyHealthRecord.com.
- **Patient:** Used here as shorthand for anyone who accesses the patient-facing portal on behalf of the patient, such as a parent, a caretaker, or patients themselves.
- **The Patient-Facing Portal:** This is what patients see when they log into MyHealthRecord.com. This only applies to practices using Greenway Patient Portal.

Feature Highlight: User Roles

Greenway Patient allows each user in the practice to have their own login.

Greenway will create a practice administrator account when the system is first set up (e.g., administrator@practicename). However, after that, you can add more practice users, if you want. Additionally, each login can have one of two roles:

- Admin
- Staff

Roles help you better control access to administrative functions.

To learn more about creating practice users and assigning roles, see *Adding and Editing Practice Users*.

Note - Adding and editing practice user information can only be done by a user with Admin rights.

Note - The default account (e.g., "administrator@practicename") should be used STRICTLY for creating new user accounts. It should not be used for any other activities in the portal.

Supported Browsers

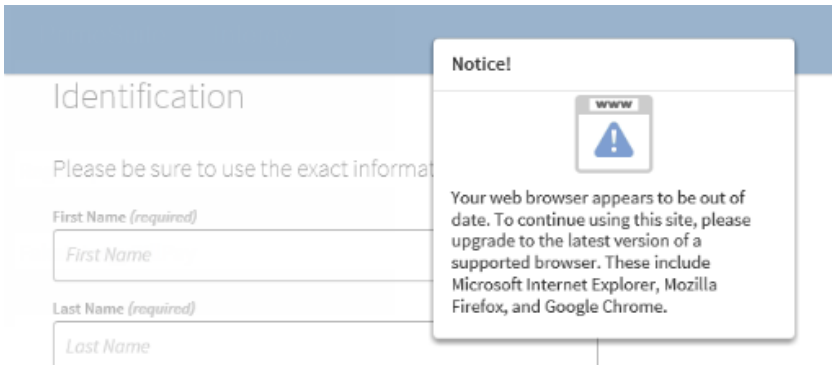
Desktop

Greenway Patient is routinely tested on the following browsers:

- Apple Safari® 6.2, 7.1, and later.

  Note - *"Pay My Bill" is not supported on any version of Apple's Safari web browser.*
- Google Chrome™ (recent versions)
- Mozilla Firefox® (recent versions)
- Microsoft Edge
- Microsoft Internet Explorer® 11

  Note - *Because of security concerns, **Microsoft Internet Explorer versions lower than 11 are not supported**. Users using these browsers may see the following message.*



Additionally, users using Microsoft Internet Explorer 11 who are running Compatibility View for MyHealthRecord.com may see a blank page or experience errors. Make sure MyHealthRecord.com is not being viewed in Compatibility View by opening Internet Explorer and going to **Tools > Compatibility View Settings** and removing MyHealthRecord.com from the list.

Mobile

Greenway Patient is routinely tested using the most common browsers on the most common platforms, including:

- Apple iOS
- Google Android™
- Microsoft Windows Phone®

It is not practical or possible for Greenway to test on every possible device. We know that over 900 different devices have been used by users to access Greenway Patient since its inception. Please report any device-specific issues to Greenway Support.

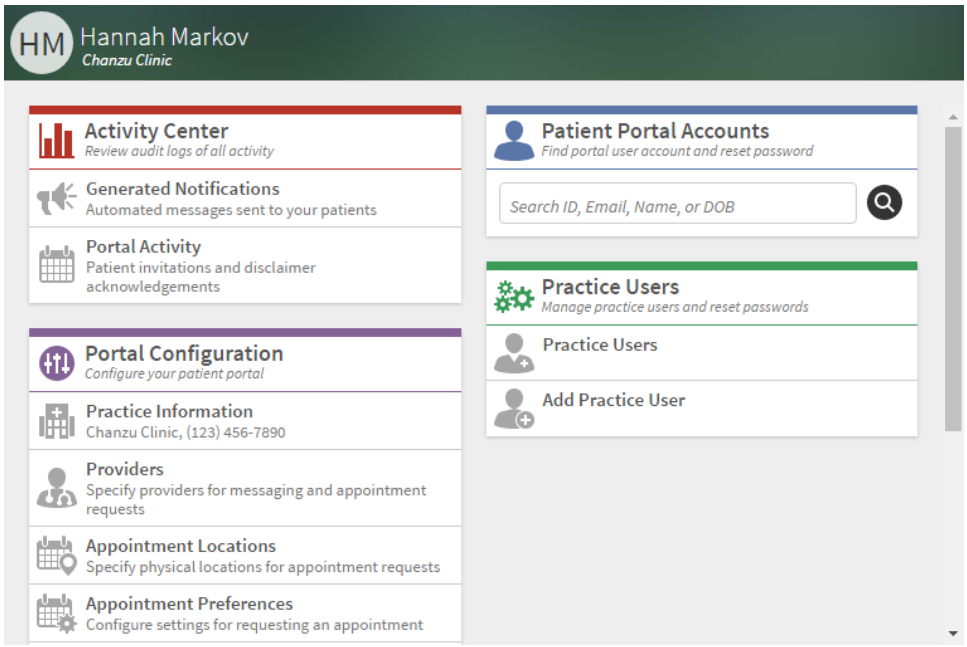
System Requirements

- Greenway Prime Suite v. 17.10.9 or greater
- Greenway Prime Suite +S v. 17.10.9 or greater
- Greenway Intergy v. 10.00 or greater

2 | The Admin Dashboard and Your Account Information

About the Admin Dashboard

The Admin Dashboard is what you see when you first log into Greenway Patient. It shows all of the widgets and functions to which you have access rights.



You can only see the functionality which applies to your products (Portal, Messaging) and role (Staff, Admin). For example, in the screenshot above, you can see the **Activity Center, Portal Configuration, Patient Portal Accounts,** and **Practice Users** widgets, along with their associated functions. This is some of what an Admin-role user in a practice which had both Greenway Patient Portal and Greenway Patient Messaging would see.

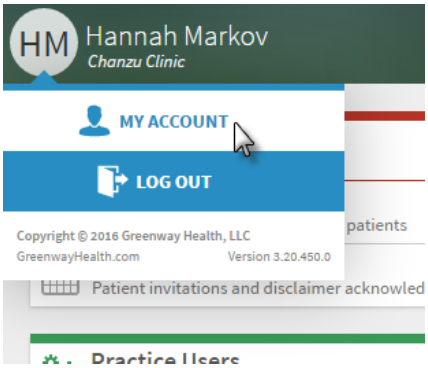
For details, see *Staff Access vs. Admin Access*.

Managing Your Account: Name, Email, and Password

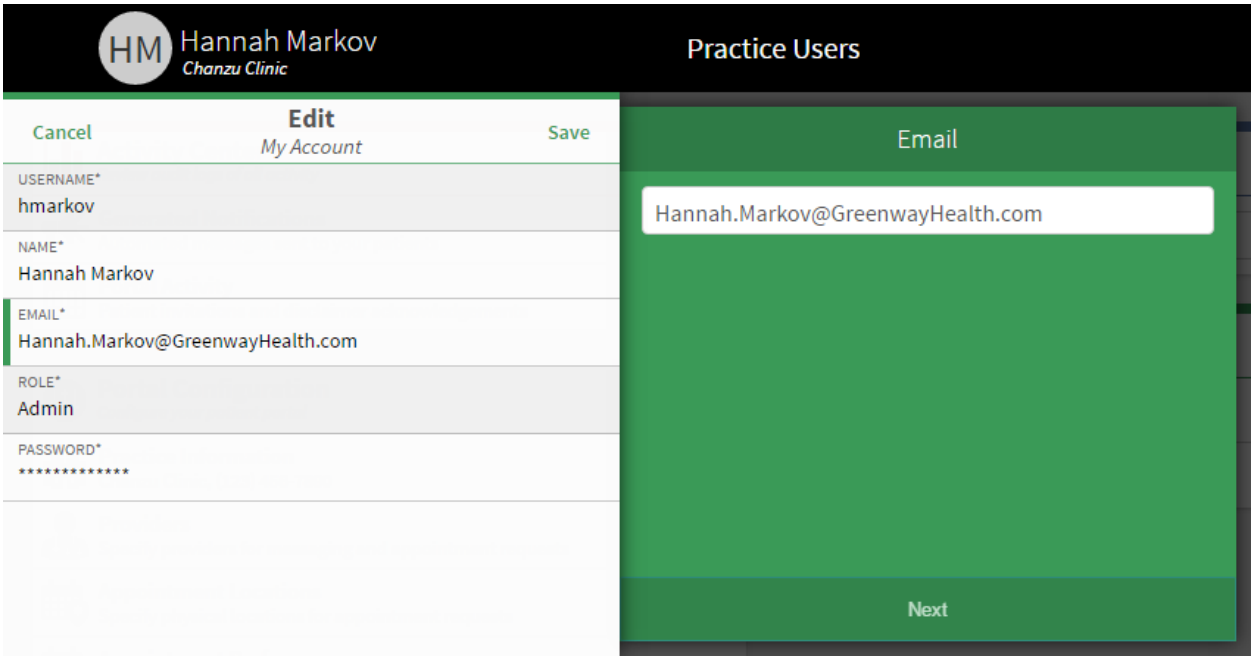
At any point, you can change your **Name**, **Email**, and **Password** using the My Account page.

How to Get Here

Select your initials in the Greenway Patient Admin Dashboard.



In the My Account page, you can edit your information. Select **Next** to move from one field to the next, and **Save** when finished.



Note - You cannot change your Username.

Note - You cannot change your own role. Only another admin can change your role using the Practice Users details view.

3 | About Greenway Patient Messaging

Greenway Patient Messaging is Greenway Health's automated integrated patient notification system. These communications are triggered by events in your EHR (Greenway Prime Suite or Greenway Intergy): after initial setup, you don't need to do anything manually to generate messaging.

Note - Greenway Patient currently only houses Greenway Patient Messaging's *Generated Notifications* list (formerly 'Interaction Center'). To set up Notices and Notifications, please contact your Greenway Health representative.

The following topic areas are of interest to Greenway Patient Messaging practices.

- Practice Users and Patients: An Overview
- Activity Center Overview

Key terms

- **Notice:** (1) An automated notification, or collection of notifications, generated using event-specific criteria such as appointment type/resource/schedule location (Prime Suite), or reason/provider/service center (Intergy). (2) A collection of settings (conditions that qualify events to trigger messages, such as an appointment type/resource/location) and at least one notification.
- **Notification:** An automated, customized message tied to a notice. Settings include delivery method, schedule, language, and message content. Note that one *notice* can trigger multiple *notifications*.

4 | About Greenway Patient Portal

Greenway Patient Portal is Greenway Health's patient engagement portal solution. This portal has been developed to work directly with Greenway Prime Suite and Greenway Intergy, allowing users to communicate electronically with the practice, as well as view, download, and transmit (VDT) information about their medical care. You can find the Greenway Patient Portal at MyHealthRecord.com.

The following topic areas are of interest to Greenway Patient Portal practices.

- Practice Users and Patients: An Overview
- Configuring the Portal
- Using the Portal
- Activity Center Overview
- MyHealthRecord.com and Greenway Patient Portal Frequently Asked Questions

Features

- Easy-to-navigate, attractive, and responsive interface that works well on desktop and mobile browsers.
- Built-in design tools to make sure your portal looks its best.
- Secure messaging between patients and care providers.
- Configurable appointment request rules, allowing patients to request appointments and view upcoming appointments.
- Secure, online bill pay through our partner, TransFirst, or through a third party solution.
- Web Content Accessibility Guidelines (WCAG) 2.0 Level A compliance for viewing, downloading, and transmission of medical data.

Meaningful Use

Greenway Patient Portal helps satisfy the following Meaningful Use measures for eligible professionals:

- Meaningful Use Stage 1 Core Measure 11 (PDF), covering VDT.
- Meaningful Use Stage 2 (2015) Measure 8 (PDF), covering patient electronic access.
- Meaningful Use Stage 2 (2015) Measure 9 (PDF), covering secure electronic messaging.

Note - You can see all of the EHR Incentive Program Objectives and Measures for 2015 for Eligible Professionals at *https://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/Downloads/2015EP_TableofContents.pdf*.

Note - *"The EHR" refers to your Electronic Health Records system. This could be Greenway Prime Suite, or Prime Suite Intergy. If a functionality described here applies to only one of those, it will be pointed out.*

Managing Users: Patients and Staff

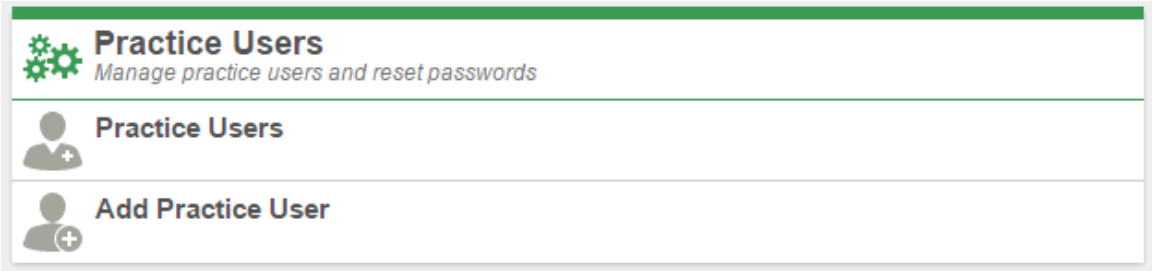
5 | Practice Users and Patients: An Overview

Greenway Patient allows you to:

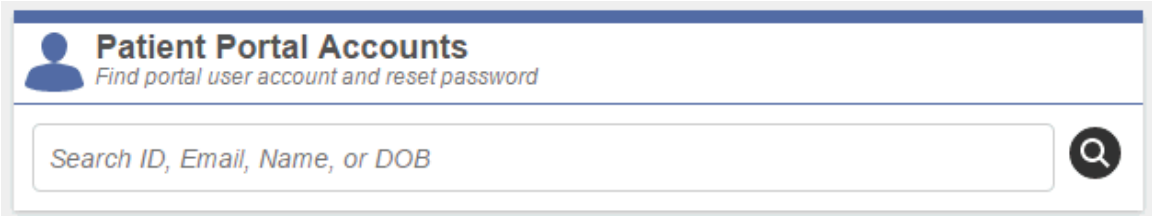
- manage practice users' access to Greenway Patient Portal and Greenway Patient Messaging;
- manage patients' MyHealtthRecord.com portal accounts.

These features are divided into the following separate areas:

- **Practice Users**, where Admin-role users can Add Practice Users and view/manage existing Practice Users. This can be used by both Greenway Patient Messaging and Greenway Patient Portal practices.



- **Patient Portal Accounts**, where Staff- and Admin-role users can view MyHealthRecord.com Patient information, as well as reset passwords. This can only be used by Greenway Patient Portal practices.



Note - For details about Staff vs Admin access permissions, see *Staff vs Admin Access* under *Adding and Editing Practice Users*.

6 | Managing Practice Users

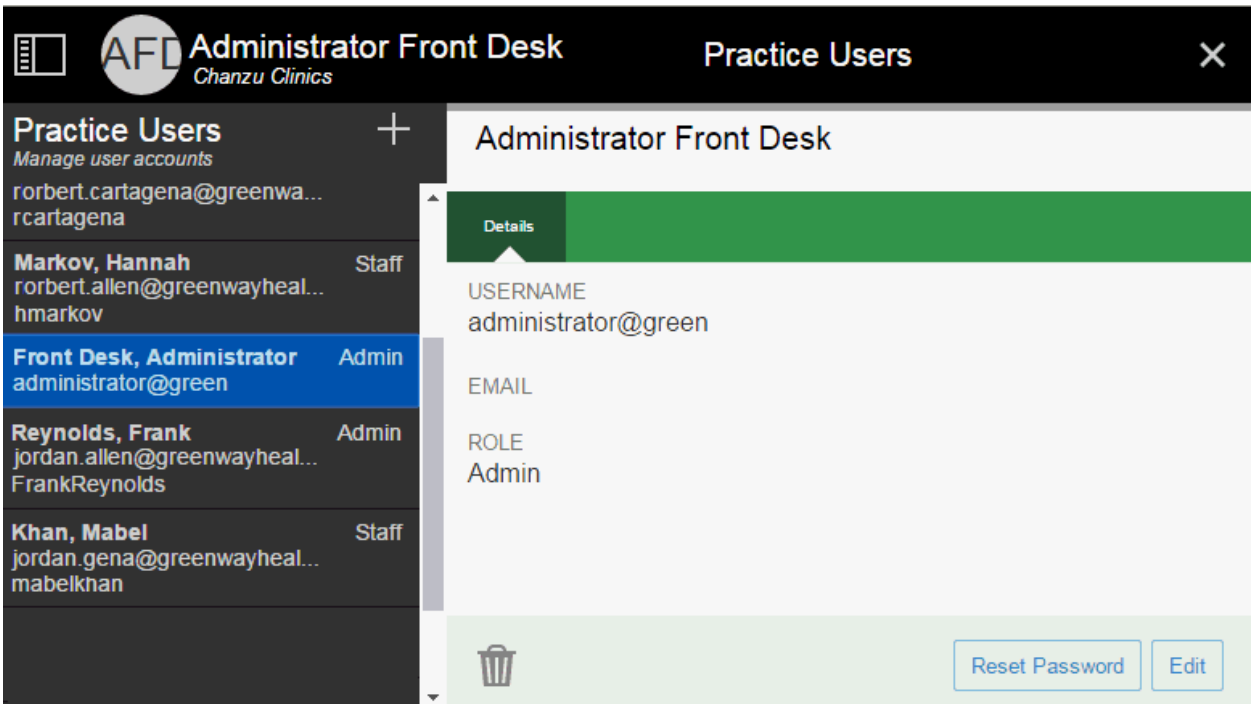
The Practice Users page allows users with admin rights to review and edit practice user details. This includes:

- Adding new practice users
- Editing access rights and details
- Resetting passwords
- Deleting the user account

To view a practice user's account's details, or to work with a practice user account, select it from the list. The list will include the user's name, email, username, and role.

How to Get Here

Select **Practice Users** from the dashboard. Select a user to view their details.



Adding Practice Users

To add a user, select ⊞, or select **Add Practice User** from the **Practice Users** widget on the dashboard. This opens the New Account page, where you can complete the process. See Adding and Editing Practice Users for details.

Note - **By default, your practice will have at least one user, the Practice Administrator account. It is created during implementation, and has the following format: "admin@practicename". However, you**

should NOT share this account with your staff, only with the practice administrator. For other users, we highly recommend that you create individual accounts.

Editing a User's Details and Access Rights

1. Select the practice user from the Practice Users list.
2. Select **Edit**. This opens the Edit Account page, where you can edit the user's name, email, role, and password. See Adding and Editing Practice Users for details.
3. **Save** when finished.

Note - **You cannot edit a user's Username. To do that, you will need to delete the user account.**

Note - **Usernames are unique, and cannot be reused, even after the account is deleted.**

Resetting a Practice User's Password

1. Select the practice user from the Practice User's list.
2. Select **Reset Password**. This opens the Password section of the Edit Account page.
3. Enter and confirm the new password then **Save**.

After resetting the password, be sure to inform the user of the new password.

Note - **All practice users can change their own passwords using the Account Information details view.**

Deleting a Practice User

1. Select the practice user from the Practice User's list.
2. Select 🗑.
3. In the **Delete Account?** verification pop-up, select **Delete**.

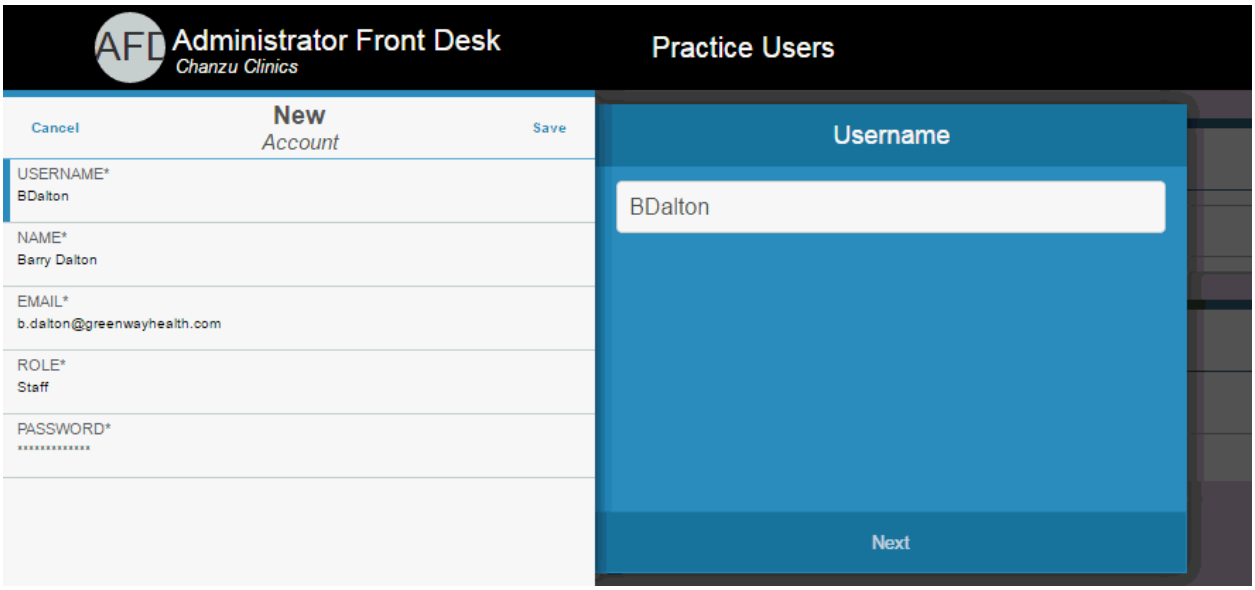
Note - **Usernames are unique, and cannot be reused, even after the account is deleted.**

7 | Adding and Editing Practice Users

Greenway Patient allows practice users to have their own individual accounts, with each account having a specific role--*Staff* or *Admin*--which determines what functionality that account can access.

How to Get Here

- If adding a practice user account, select **Add Practice User** from the dashboard, or select ⊞ in the Managing Practice Users details view.
- If editing a user's information, find a user in the Managing Practice Users details view and select **Edit** for that user.



Entering Account Details

All accounts require a **Username**, **Name**, **Email**, **Role**, and **Password**.

- For new practice users, begin by selecting the **Username**.
- For existing practice users, select the field you want to edit from the list.

To move between fields, select **Next**, or choose the field name from the Account panel.

Account Details

- **Username:** How the user will log in. Must be unique, and can never have been used, even if the original account for that username was deleted. Note that usernames are not case sensitive. ('ASmith' and 'asmith' will both work.)
- **Name:** First and Last.
- **Email**

- **Role:** Select between *Staff* and *Admin*. See the *Staff Access vs. Admin Access* section for details
- **Password:** Must meet the following requirements:
  - Must be 8-20 characters long.
  - Must include letters AND numbers.
  - Can use _ . ! $ * =.
  - Cannot use @ or spaces.

  Note - *Passwords are case sensitive. ('GrEeN123' is not the same as 'green123'.)*

When you finish entering the information, select **Save**. This will create the new account (if adding a new user), or will close the Edit drawer.

Staff Access vs. Admin Access

- All *Staff*-role users can access the Activity Center widget.
- *Staff*-role users with access to Greenway Patient Portal can also access the Patient Portal Accounts widget.
- All *Admin*-role users can access the Activity Center and Practice Users widgets.
- *Admin*-role users with access to Greenway Patient Portal can also access the Patient Portal Accounts and Portal Configuration widgets.

Widget/Report	Practices Using Greenway Patient Portal Only		Practices Using Greenway Patient Messaging Only		Practices Using Both Products	
User Role	**Admin**	**Staff**	**Admin**	**Staff**	**Admin**	**Staff**
Activity Center	X	X	X	X	X	X
- Portal Activity	X	X			X	X
- Generated Notifications			X	X	X	X
Portal Accounts	X	X			X	X
Portal Configuration	X				X	
Practice Users	X		X		X	

8 | Patient Portal Accounts

The Patient Portal Accounts page is for use by Greenway Patient Portal practices, and allows practice users to:

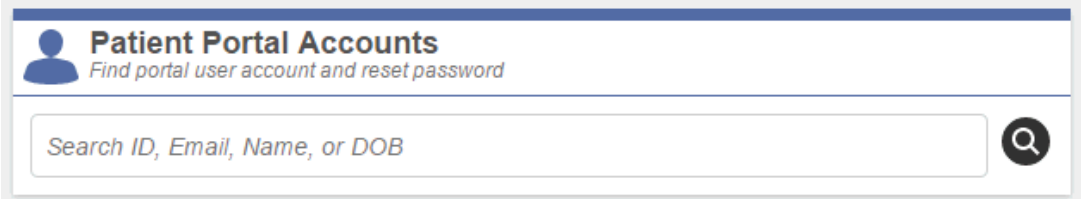
- Reset a MyHealthRecord.com user's password,
- View a patient's basic information, including a listing of patients linked to that patient.

Note - Patients can be patients, as well as a patient's parent or caretaker. These relationships are set up in the EHR.

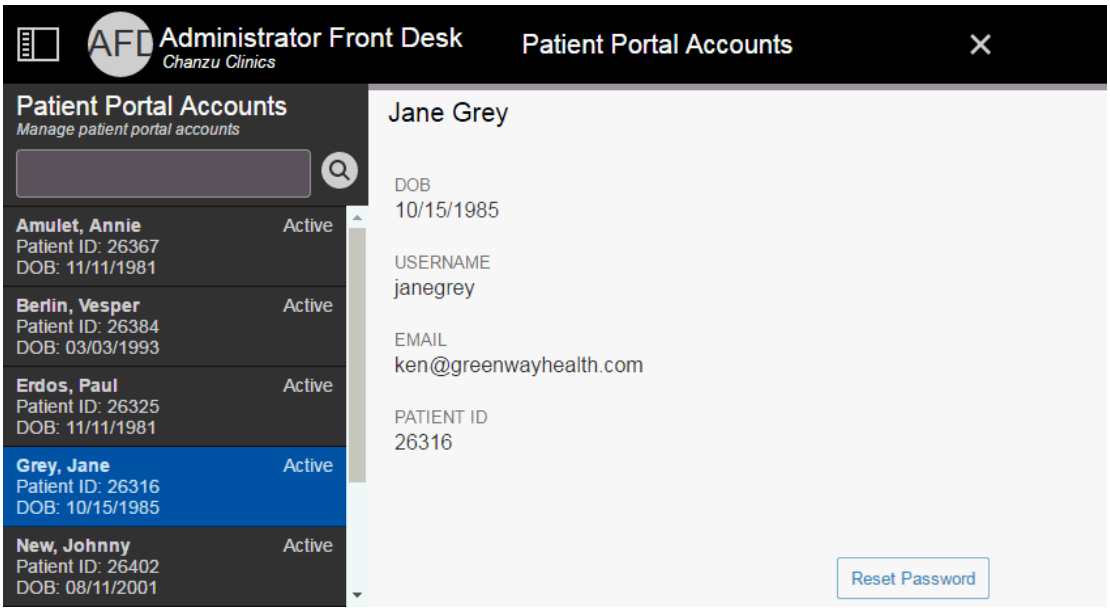
How to Get Here

Start by searching for a user from the **Patient Portal Accounts** widget, or select **Patient Portal Accounts** in the Admin Dashboard.

Note - *For best results, we recommend searching by ID or email.*



Either one of these will open the Patient Portal Accounts details view. Select an account to view its details.



Account details include the following information:

- user's name

- patient ID
- date of birth
- status

You can also search using the field above the list.

Searching for Users

In the search bar, enter one of the following:

- **Patient ID:** Use the complete ID number (e.g., "26112", not "261").
- **Email:** Use the complete email the user registered with (e.g., "isaac@example.com", not "isaac@ex").
- **First Name** and/or **Last Name:** We recommend you use only one of these, or to search by "Last, First".
- **Birth Date:** Must include day, month, and year in any standard way (e.g., "01 January 2001", "01/01/01").

Remember the following:

- Searches will only return up to 150 results.
- Can't find who you're looking for? Try searching a more unique parameter, like the user's Email, or Patient ID.
- Make sure you’re looking for a person registered with MyHealthRecord.com. Patients who aren’t registered will not show up in searches.
- When you search for names, the system will also look for phonetically similar names. (For example, if you search for "Alice", the system may also return "Allis" and "Alicia".)
- All registered patient accounts have a Patient ID. This includes patients and their caretakers.

Viewing a Patient Portal User’s Details

To view a patient's information, or to reset their password, select the user from the list. User information includes:

- first and last name
- date of birth (DOB)
- portal username
- email
- patient ID number (as found in the EHR)
- a list of any patients linked to this user.

Linked patient information includes:

- first and last name
- DOB
- patient ID number
- relationship to the selected user

Editing User Information

Patient information is edited using the EHR. Patients can submit a change request through the portal, but all changes must be approved using the EHR. See your EHR's help documentation for details.

Linking and Unlinking Patients

Patient linking and unlinking can only be done using the EHR. See your EHR's help documentation for details.

Resetting a Patient's Password

Note - *Patients can also reset their own password by clicking the **Forgot Password** link on the MyHealthRecord.com login page.*

1. Search for the patient.
2. Select the record from the list.
3. Select Reset Password.
4. In the verification window, choose **Yes**.

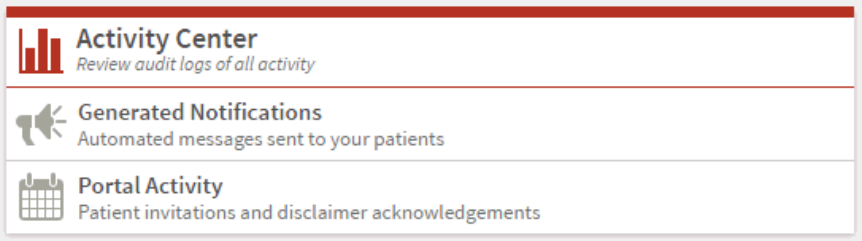
A message with a link to reset password will be sent to patient's email. The link will expire after 24 hours.

Reporting and the Activity Center

9 | Activity Center Overview

With the Activity Center widget, Greenway Patient gives your practice the tools to track patient activity and communications. These include:

- Generated Notifications: Displays all notifications generated by Greenway Patient Messaging. This includes notifications in all statuses—*sent, error,* and *pending*—not just *delivered*. For use by Greenway Patient Messaging practices only
- Portal Activity: Logs the status of invitations to the portal and legal disclaimer acceptance by patients. For use by Greenway Patient Portal practices only.



Generated Notifications

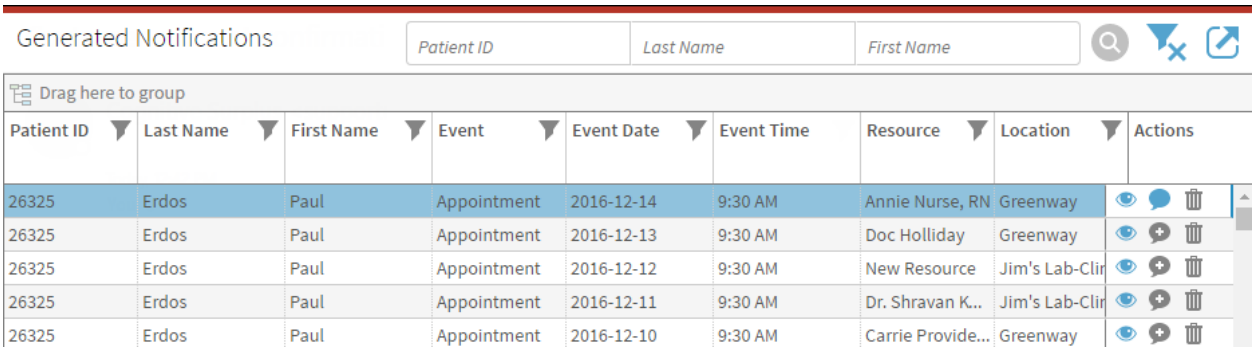
The Generated Notifications page allows Greenway Patient Messaging practice users to see a list of patient notifications. You can also:

- view messages and responses
- comment on an entry
- delete pending notifications
- organize and export the report

Note - For changes to your link configuration, including setup and modifications to your notices and notifications, contact your Greenway Implementation team representative.

How to Get Here

Select **Generated Notifications** from the dashboard.



Find any patient by searching for their Patient ID, Last Name or First Name using the appropriate search box, then selecting .

Note - Searches are not affected by filters, so we recommend leaving them in place when searching for patients.

Reading the Generated Notifications Logs

By default, the Generated Notifications details view will show only those notifications delivered the previous day. Change what's displayed here by using the filtering features for any of the following.

Note - *See* Organizing the List *later in this chapter for details on filtering and organizing this information.*

- **Patient ID**, **First Name**, and **Last Name**.
- **Event** type (*Appointment*, *Birthday*, etc.), as well as when it is scheduled for (**Event Date, Event Time**).
- **Resource** and **Location** associated to the event (if relevant).
- **Notify Date**, or when the notification delivery date. By default, this filter is set up to show only the previous day's notifications, but can be changed to display a different date, a range of dates, or all notifications generated.
- **Notice Name**
- Delivery **Method** (*Email*, *Voice*, *SMS*, etc.)
- Deliver **Status**. Statuses include:
  - *Pending:* Created for future delivery
  - *Sent:* Successfully processed.
  - *Error:* Delivery attempted, but unsuccessful
- **Response** to interaction (if bidirectional option is used).

Actions

You can take the following actions for each event:

- **Review the message**. In the case of voice messages, you can see the MP3 file name and/or text-to-speech used.
- **Comment on this event**. If a comment exists, you will see , instead. This is used to track completed work related to errors, and bidirectional responses to cancel or reschedule appointments.
- **Delete the pending event**. Ideally, you should make changes to events in your EHR. However, in the event that you need to cancel a pending message before delivery, and don't have the time to make the proper changes in the HER, this functionality allows you to do so.

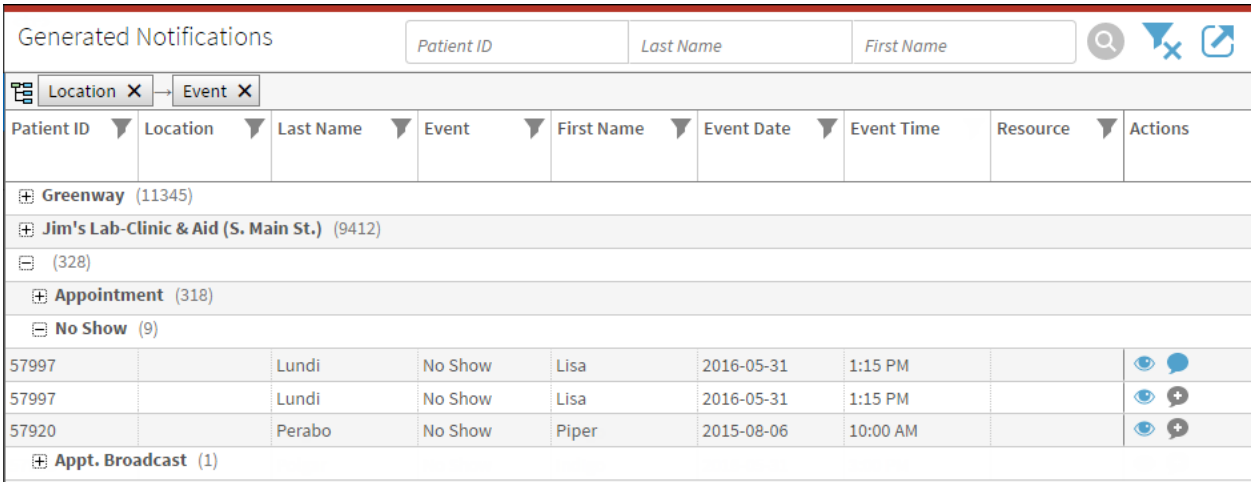
  Note - *Deleted notifications are removed from your list and cannot be restored.*

Organizing the List

Grouping by Columns

Drag a column name to the **Drag here to group** bar to group items in the list.

- You can group by more than one column.
- Fields will group in order you choose them.



For example, if you group by **Location** then **Event**, then first you will see a list of all locations (with the total number of records in parentheses), and underneath a list of all event types. Select the ⊞ to expand the list.

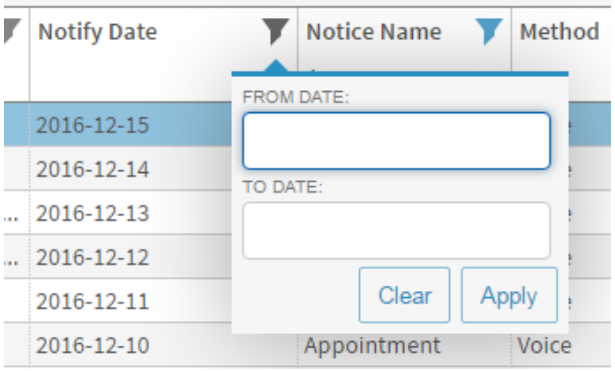
Selecting **X** for a column will remove that grouping.

Moving Columns

Select and drag a column's name to reposition it.

Filtering Entries in the List

Use Filter icon to see the filtering options.



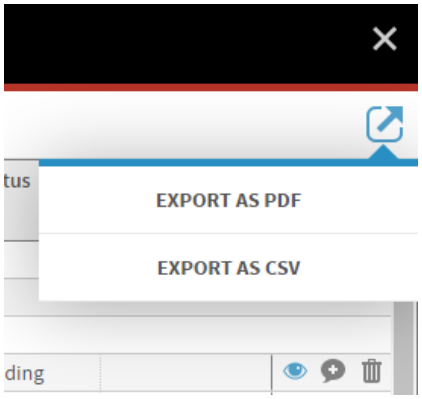
When a filter has been applied, the filter icon will turn blue, and the filter criteria will show under it.

Resource	Location *Greenway*	Notify Da
Annie Nurse, RN	Greenway	2016-12-1
Doc Holliday	Greenway	2016-12-1
Carrie Provider, ...	Greenway	2016-12-1

- Remove a filter by selecting it then selecting **Clear**.
- Selecting the **Reset Filters** icon to remove all filters and return **Notify Date** to its default.

Exporting the Report

After organizing and filtering the Generated Notifications report to your liking, select the Export icon to export the report as either a PDF or a CSV. This can be used for printing the report, or importing it to a tool such as Microsoft Excel.

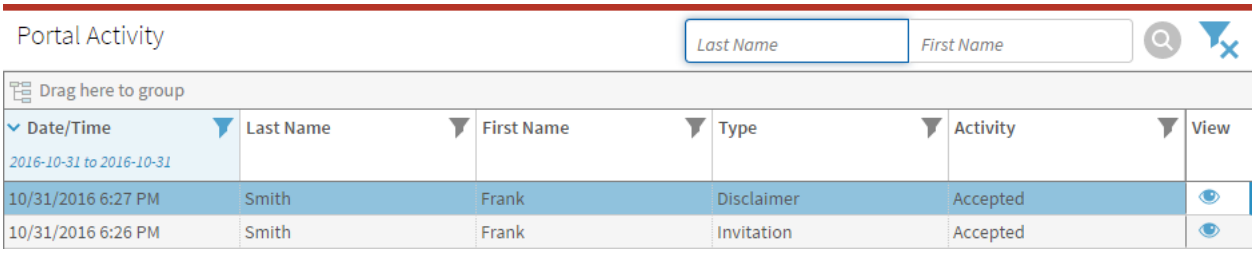


10 | Portal Activity

The Portal Activity page logs the status of invitations to the portal, and allows Greenway Patient Portal Staff- and Admin-role users to review whether patients accepted or declined the legal disclaimer.

How to Get Here

Select **Portal Activity** from the dashboard.



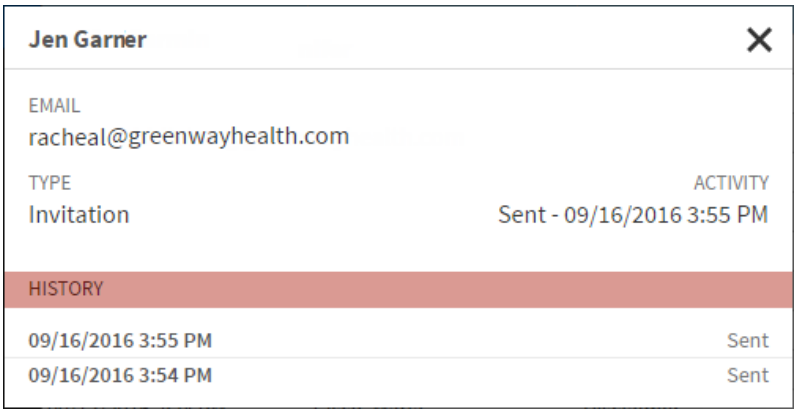
Find any notification by searching for the recipient's Last Name or First Name using the appropriate search box then selecting .

Note - Searches are not affected by filters, so we recommend leaving them in place when searching for patients.

Reading the Portal Activity Logs

- **Date/Time** of the activity.
- **Account Holder** affected.
- **Type** and **Activity**:
  - ***Invitation*** to the portal.
    - **'Sent':** Invitation was successfully delivered to the patient's email.
    - **'Accepted':** The patient registered using the link provided in the invitation.
  - ***Disclaimer:*** logs whether the patient ***'Accepted'*** or ***'Declined'*** the disclaimer message shown when they first logged in, or when they re-acknowledge the disclaimer.

  Note - *If an invitation expires, the **Status** will remain as 'Sent'. When a patient clicks on an expired invitation link, they're taken to a page telling them to contact the practice for a new invitation.*
- Select to review the event's details and history.

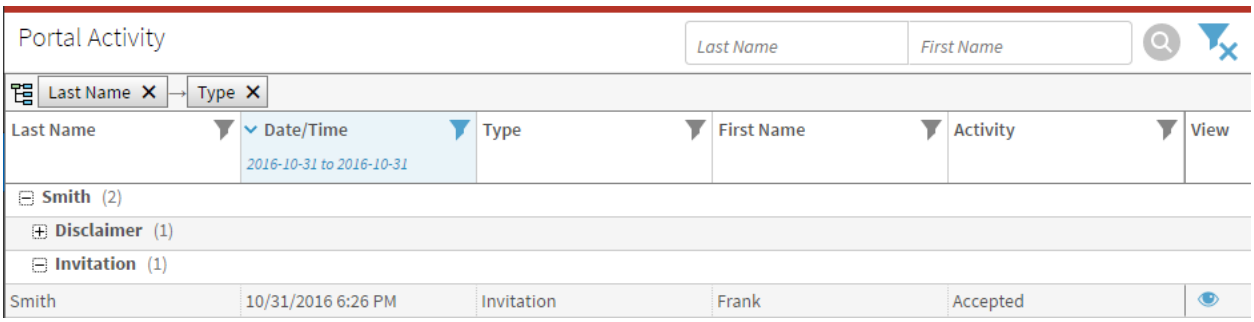


Organizing the List

Grouping by Columns

Drag a column name to the **Drag here to group** bar to group items in the list.

- You can group by more than one column.
- Fields will group in order you choose them.



For example, if you group by **Last Name** then **Type**, first you will see a list of all recipient last names (with the total number of records in parentheses), and underneath a list of all notification types. Select the ⊞ to expand the list.

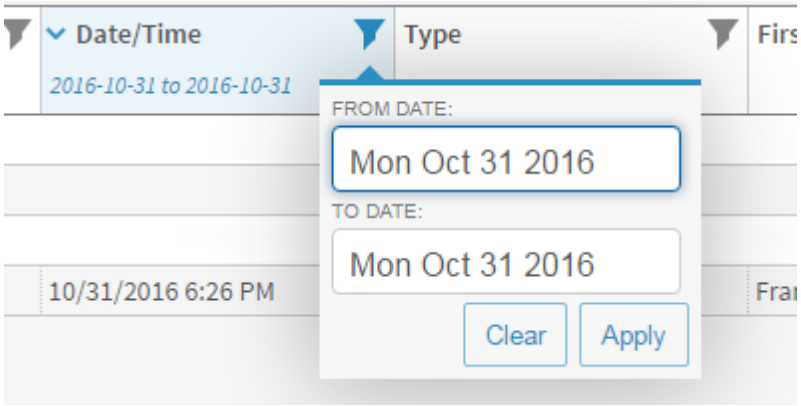
Selecting **X** for a column will remove that grouping.

Moving Columns

Select and drag a column's name to reposition it.

Filtering Entries in the List

Use Filter icon to see the filtering options. When a filter has been applied, the filter icon will turn blue, and the filter criteria will show under it.



Remove a filter by selecting it then selecting **Clear**, or by selecting the **Reset Filters** icon .

MyHealthRecord.com Portal Configuration

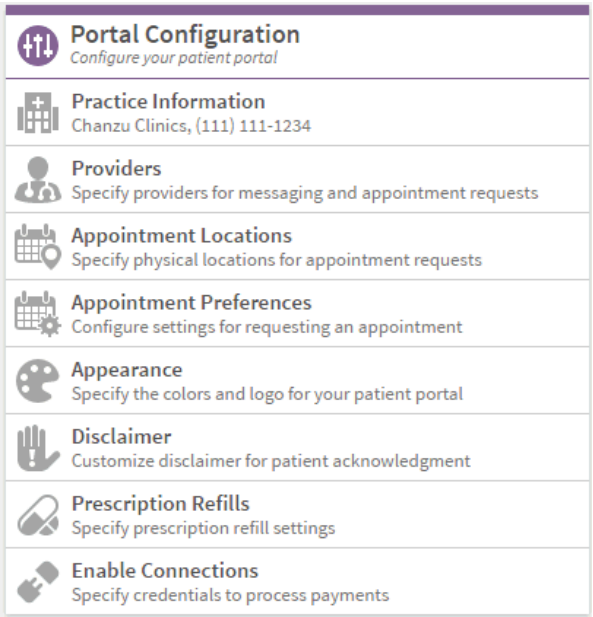
11 | Configuring the Portal

The Portal Configuration widget allows Greenway Patient Portal Admin-role users to setup the look and feel of MyHealthRecord.com, as seen by Patients. You can configure the following:

- Practice Information, including the name and phone number.
- Providers available for secure messaging and appointment requests.
- Appointment Locations available for appointment requests.
- Appointment Preferences the patient can select, such as location and provider options, and preferred days.
- Appearance, including logo and color scheme.
- Disclaimer message which patients must acknowledge before using the portal.
- Prescription Refill options, including which medications can be requested.
- Enable Connections to online payment systems.

How to Get Here

Select **Portal Configuration** from the dashboard.



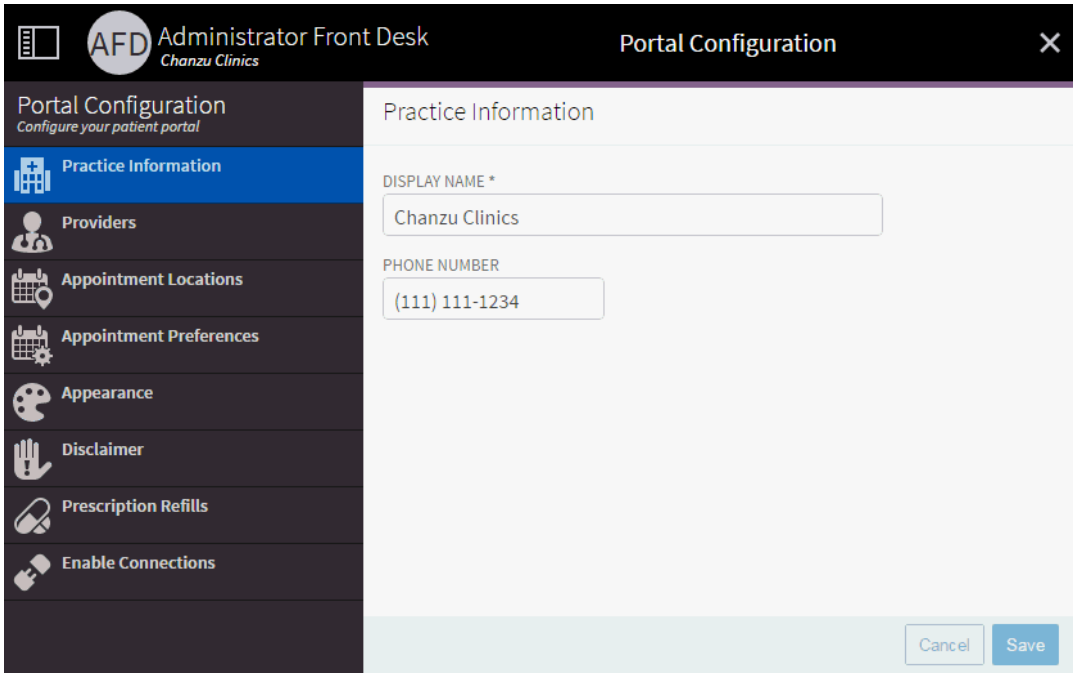
12 | Practice Information

The Practice Information page is where Greenway Patient Portal Admin-role users can define the practice name (**Display Name**) and **Phone Number** that patients will see for your practice. Only the **Display Name** is required.

Changes show up on the practice portal side immediately after you select **Save**.

How to Get Here

Select **Practice Information** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



13 | Providers

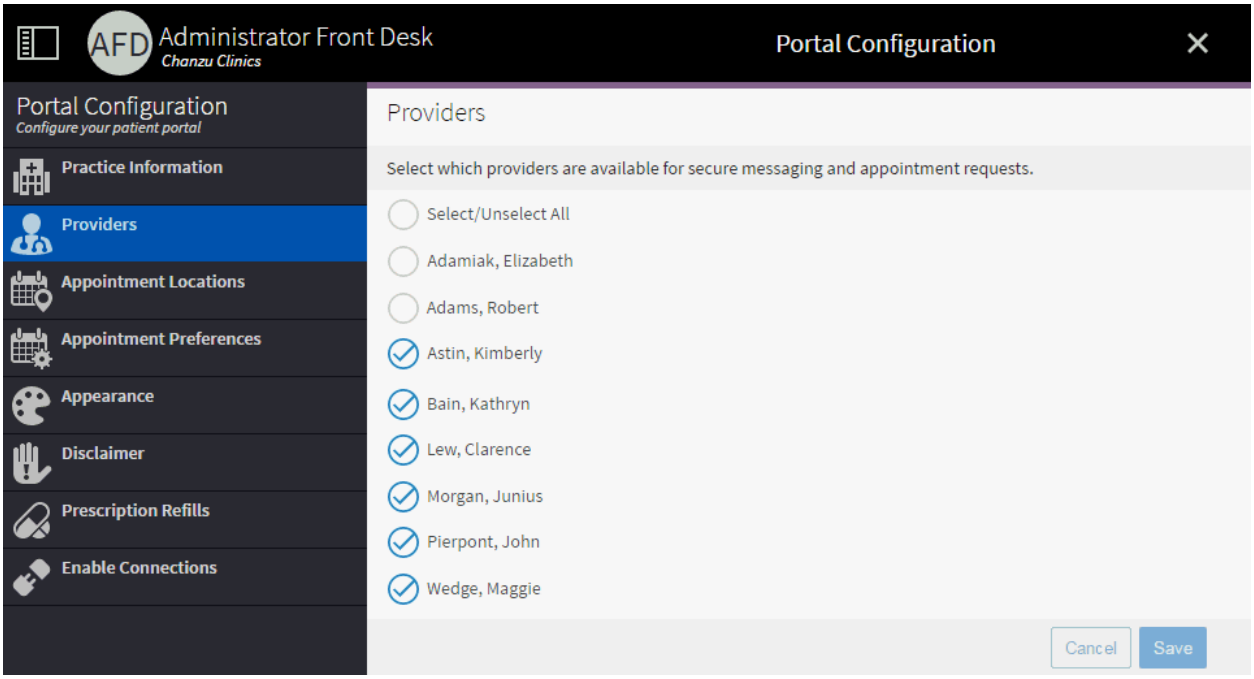
The Providers page is where Greenway Patient Portal Admin-role users can select which providers are available for secure messaging and appointment requests.

Even if no care provider is selected, patients will still be able to send secure messages via the portal. They will not, however, be able to select a physician during appointment requests.

Note - If you want patients to be able to choose a care provider in appointment requests, make sure both Allow appointment requests and Show provider options are turned on in *Appointment Preferences*.

How to Get Here

Select **Providers** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



Note: *Provider selections are pulled from your EHR, and include only those which are on-staff and billable. You will not see any providers if the portal has not yet been connected to it.*

14 | Appointment Locations

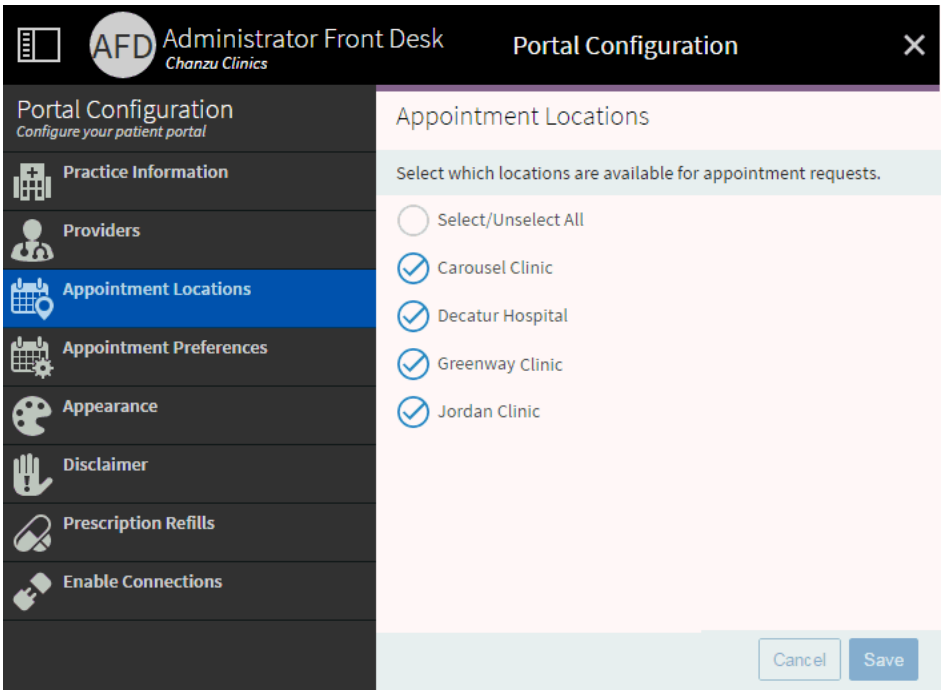
The Appointment Locations page allows Greenway Patient Portal Admin-role users to select which locations are available for appointment requests.

If no locations are selected, users won't be able to request a location.

Note - If you want patients to be able to choose a location in appointment requests, make sure both Allow appointment requests and Show location options are turned on in *Appointment Preferences*.

How to Get Here

Select **Appointment Locations** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



Note - Location selections are pulled from your EHR. You will not see the any locations if the portal has not yet been connected to it.

15 | Appointment Preferences

The Appointments Preferences page allows you to select whether to **allow patients to request appointments** via the portal. If your practice allows this, you can also select what options you want to give them, including:

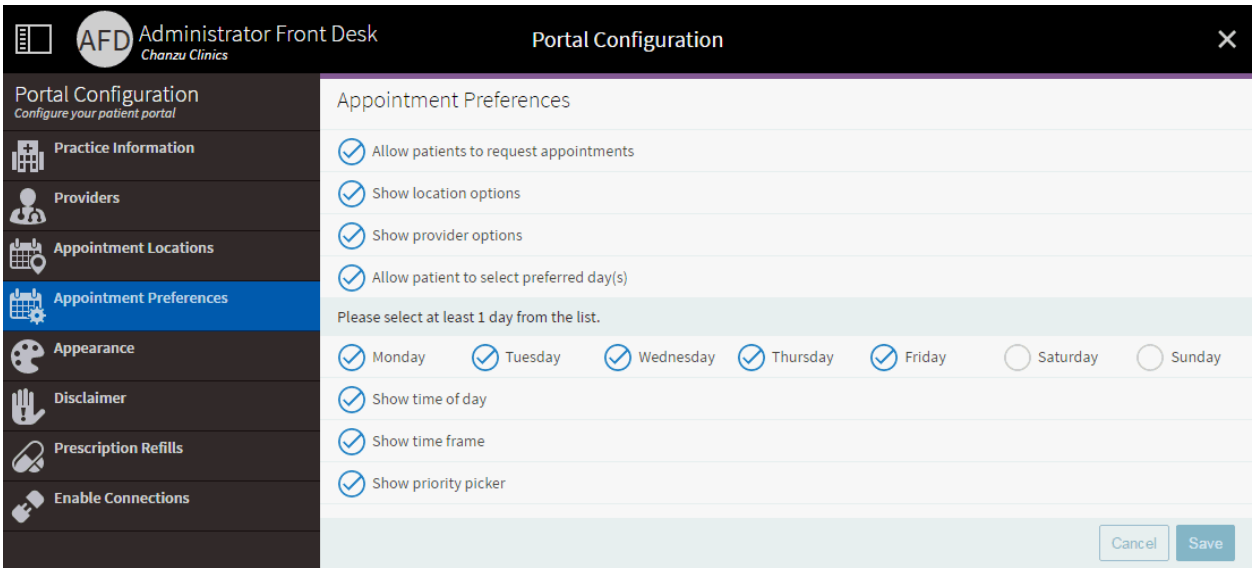
- **Location options** from the locations checked in Appointment Locations.
- **Provider options** from the providers checked in Providers.
- **Preferred days.** If checked, you must select at least one day.
- **Time of day**, which can be *Morning* or *Afternoon*.
- **Time frame**, or how soon they want the appointment.
- **Priority**, or which selection is most important.

Note - In cases where there is only one location and one physician, Show location options and Show provider options can be safely left unchecked.

Changes are immediately visible to users in the My Appointments page after you **Save**.

How to Get Here

Select **Appointment Preferences** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.

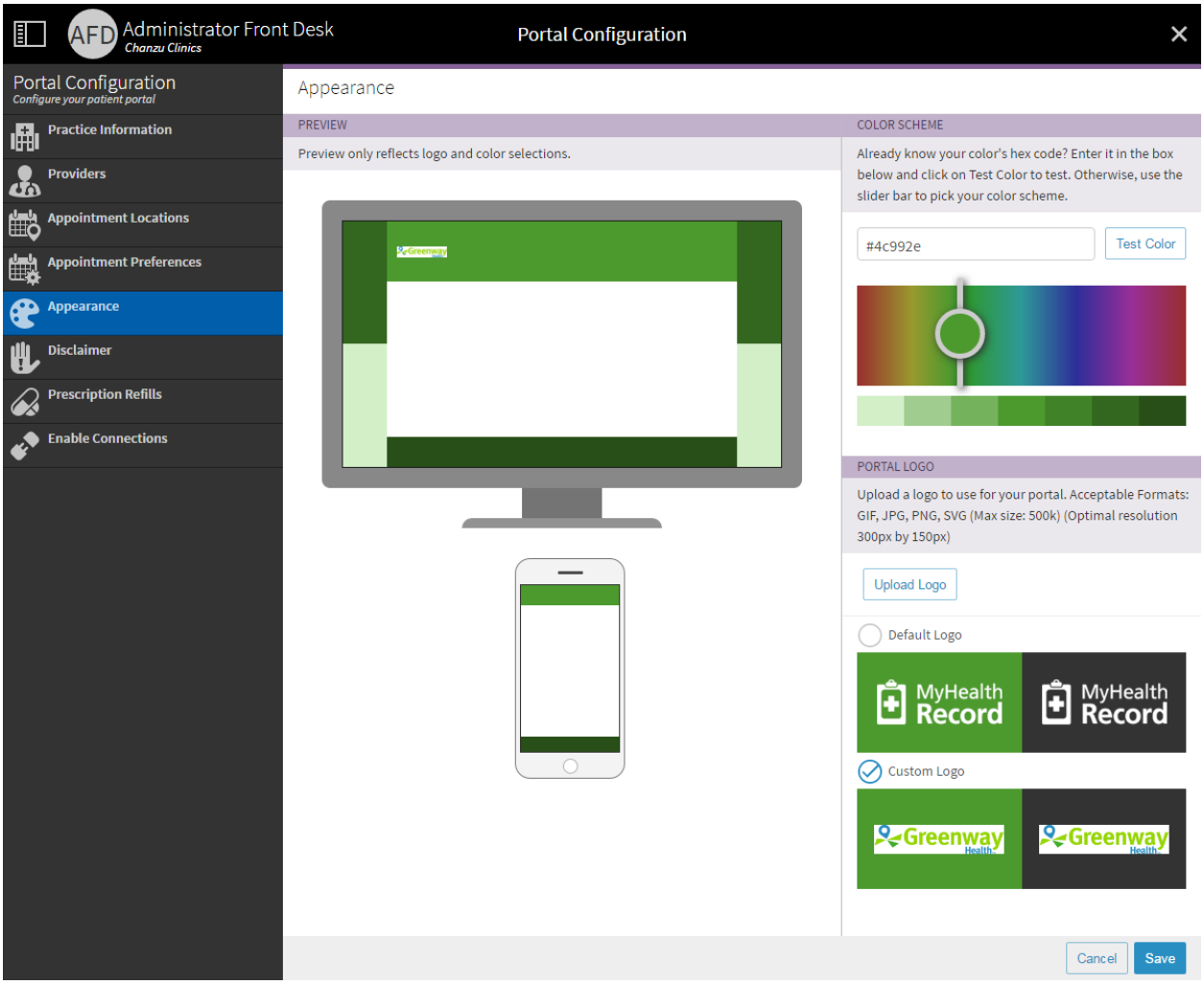


16 | Appearance

The Appearance page allows Greenway Patient Portal Admin-role users to pick and test a color scheme, as well as upload a unique logo for the practice. The desktop and mobile previews will show up in real time. Any changes made here are immediately visible to patients after you **Save**.

How to Get Here

Select **Appearance** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



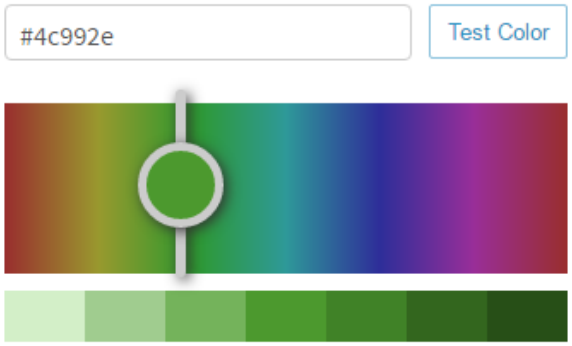
Picking a Color Scheme

Greenway Patient Portal is designed to make creating an attractive patient-facing portal simple, giving you two ways to develop your color scheme:

- manually entering a hexadecimal color code

- picking a color scheme using the color slider

After choosing a color, the system will automatically select some complementary accent colors, too.



The Portal Logo

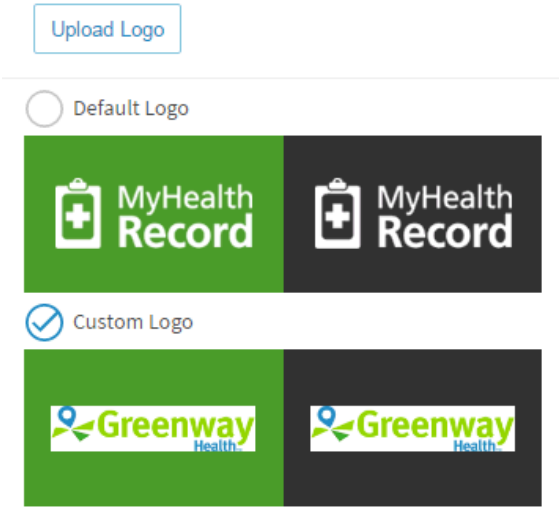
By default, MyHealthRecord.com includes a logo which may be used out-of-the-box. You may, however, upload your own logo.

Tip: *If creating your own logo, follow these design tips to make sure your logo looks its best.*

Uploading Your Logo

1. Under the **Portal Logo** section, select **Upload Logo**.
2. Select the file to upload.

Note - File names for uploaded logos can't contain any spaces.



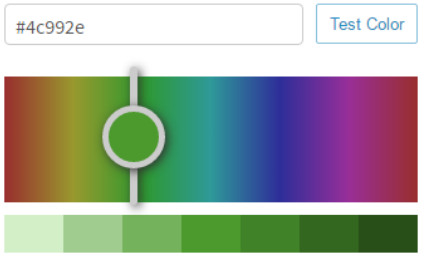
After uploading the file, you can preview what the logo will look like on the desktop version of the site, as well as the mobile. You can upload new logos at any time, as well as switch to the default logo by selecting it in the **Portal Logo** section.

Once you're happy with your colors and logo, select **Save**.

Picking a Color Scheme Using a Hexadecimal Color Code

If you know the hexadecimal color code for the color you want to base your portal theme around:

- Go to the Appearance page.
- Enter it in the Color Code field.
- Select **Test Color**. The color slider will shift to the color entered, or the closest supported color.
- If you need to adjust the colors, you can do so using the color slider, or by entering another code and selecting **Test Color**.
- Once you find a color scheme you like, **Save**. Patients will immediately see the new color scheme.



Note - Changes are not visible to patients until after you save your changes.

Picking a Color Scheme Using the Color Slider

If you don't know the hexadecimal code for the color you want, or if you want to explore all available options, you can use the color slider.

1. Open the Appearance page.
2. Drag the slider along the color bar until you reach a set of colors you're happy with. You can see a color palette below the color slider, in addition to the live preview.
3. When you find a color scheme you like, select **Save**. Patients will immediately see the new color scheme.

Note - Changes are not visible to patients until after you save your changes.

Logo Design Tips

The portal allows you to use the following:

- **Formats:** GIF, JPG/JPEG, PNG, and SVG.
- **Optimal Resolution:** width - 300px; height -150px.

- **Maximum file size:** 500kb.

Note - We recommend smaller file sizes. Your patients may experience longer loading times if you use larger image files.

In addition to these technical requirements, when designing a logo to use with your practice's user portal, keep the following tips in mind:

Use Logos With

- White or light colored images on transparent backgrounds.
- Images that match your scheme's background color.

Note - *The JPG/JPEG format does not allow for transparent backgrounds.*

Examples

Avoid Using Logos With

- Dark colored images or backgrounds.
- Color images that clash with the color scheme.

Examples

Uploading Your Logo

To upload a logo, see the *Uploading Your Logo* section of the *Appearance* help topic.

17 | Disclaimer

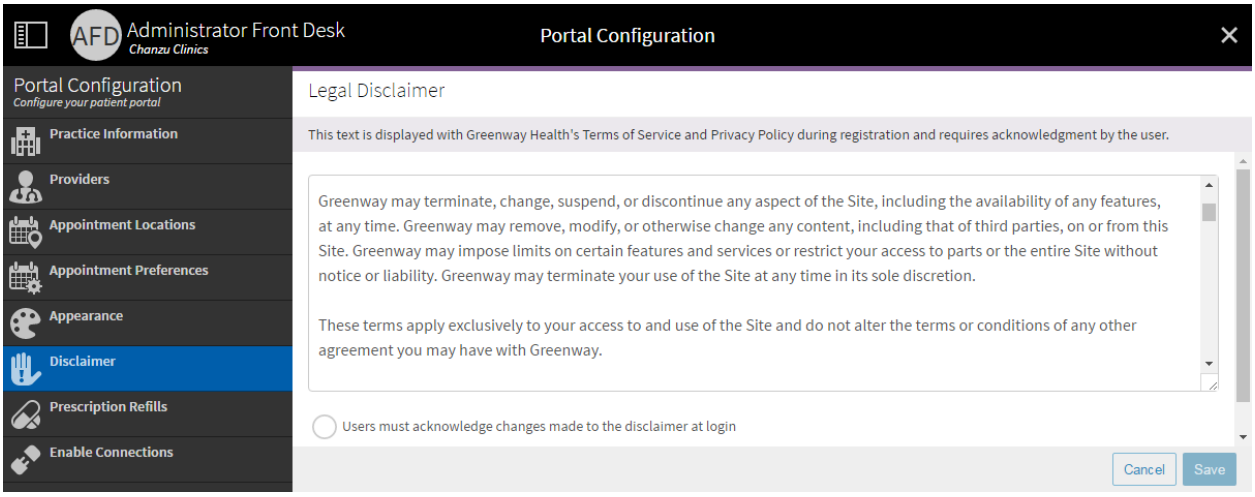
The Disclaimer page allows Greenway Patient Portal Admin-role users to create the legal disclaimer and terms of service patients must accept when first logging into the portal. This disclaimer is displayed alongside Greenway Health's Terms of Service and Privacy policy. If you make changes, check **Users must acknowledge changes made to the disclaimer at login** to have the system display the message again the next time a user logs in. Changes take immediate effect after you **Save**.

Note - ***First-time users will always see the disclaimer.***

Note - ***We recommend you consult legal counsel when crafting this message.***

How to Get Here

Select **Disclaimer** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



18 | Prescription Refills

The Prescription Refills page allows Greenway Patient Portal Admin-role users to select whether to **allow patients to request medication refills** via the portal. If your practice allows this, you can also select which options to include, including:

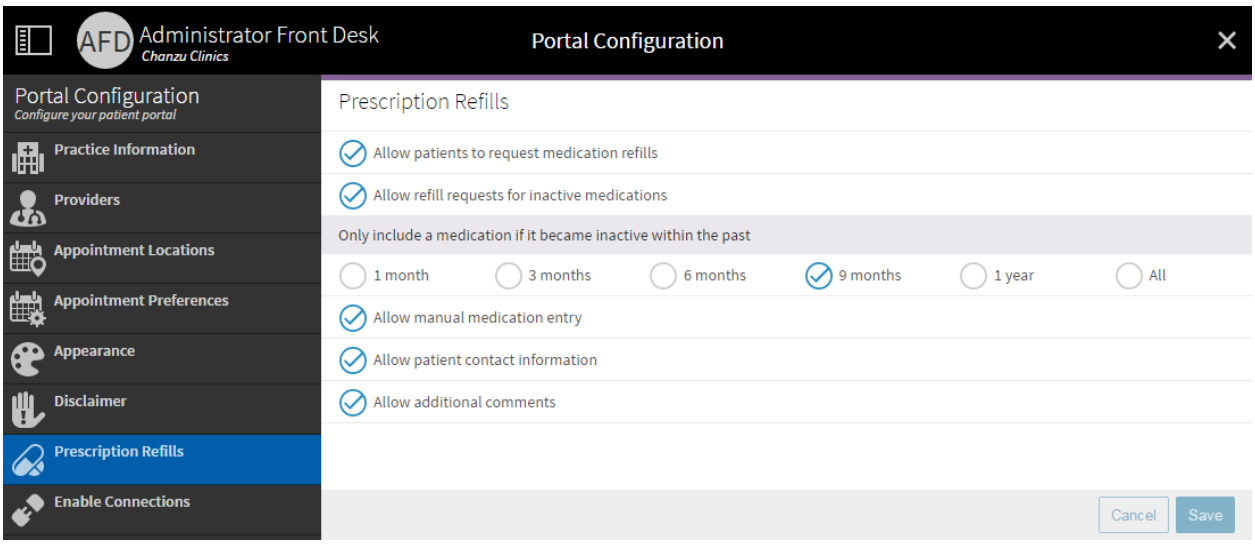
- **Request inactive medications**. If checked, you can choose to include only those medications which became inactive within a certain period (from **1 month** to **All**).
- **Manual medication entry**. If checked, users will have an **Other** option, where users can type in a medication name.
- **Patient contact information,** so users can enter a new Preferred Phone Number for this request.
- **Additional comments**, where users can enter additional information.

Changes are immediately visible to users in the Medications page after you click **Save**.

When patients send refill requests, a task will be sent to the EHR.

How to Get Here

Select **Prescription Refills** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



19 | Enable Connections

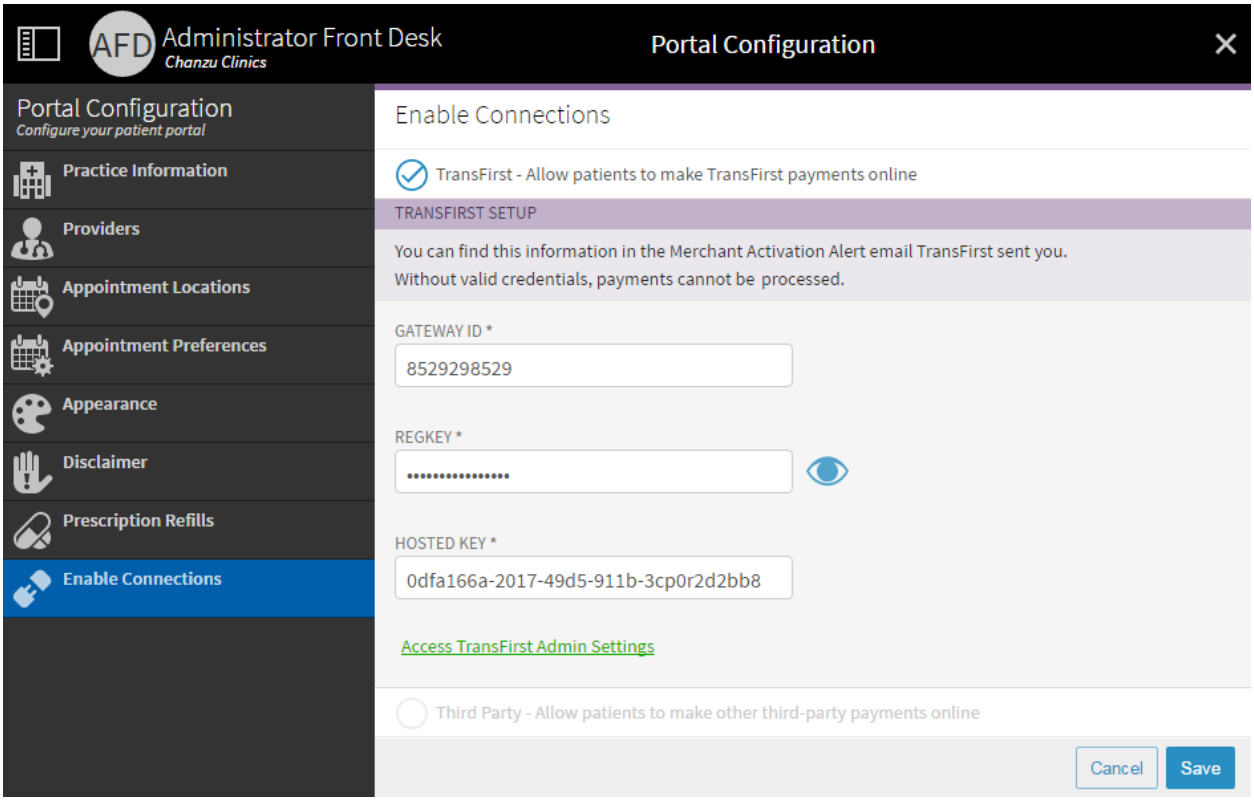
The Enable Connections page is where Greenway Patient Portal Admin-role users set up how users can securely make online payments. Here, you can enable the integrated TransFirst solution, or you can specify another third party billing solution.

Note - By default, all billing solutions are disabled.

When a secure payment connection is enabled, patients will see a **Pay My Bill** icon.

How to Get Here

Select **Enable Connections** from the **Portal Configuration** widget on the Admin Dashboard, or from the Portal Configuration panel.



TransFirst vs Third Party Solutions

Integration

- The TransFirst solution is integrated into MyHealthRecord.com, so users will be able to pay their bill from within the portal.

- With third party solutions, when patients select **Pay My Bill**, a separate window will open and take them to the appropriate payment page.

Note - You can only use TransFirst or a third party solution, but not both simultaneously. To switch from one to another, first de-select the one selected.

Security

- TransFirst payments are secured and handled by TransFirst. Third party solutions are subject to that third party's security guidelines.

Tasks

- **Prime Suite Users Only:** When using TransFirst, any successful payments made will send a task to the Task List with payment information.
- **Intergy Users Only:** When using TransFirst, any successful payments made will be added Credits tab of the Patient Information Financial page in the Intergy Desktop.
- **All Users:** When using a third-party solution, no task will be sent.

Connecting to TransFirst

Note - You must sign up with TransFirst before connecting. This guide presumes you have already done so and received a Merchant Activation Alert email with your connection details. That part of the process is outside the scope of this guide. For questions, please contact TransFirst.

1. Select **TransFirst** as your bill pay option.
2. Enter the information you received in your Merchant Activation Alert email when you first signed up. This email includes:
   - **Hosted Key**
   - **RegKey** (select to unmask the values.)
   - **Gateway ID**
3. Select **Save** to connect and activate.

If you need to access your TransFirst account and make changes to billing settings, select the **Access TransFirst Admin Settings** link.

Using a Third Party Billing Solution

1. Select **Third Party** as your bill pay option.
2. Enter the web address for the third party's secure payment form in the **URL** box.
3. Select **Test Page** to make sure the page is correct. A new window will open and take you to the third party payment form. This is what your patients will see when they select **Pay My Bill**.

4. **Save** to connect and activate.

Turning Bill Pay Off

To stop patients from making payments online:

1. De-select both TransFirst and Third Party options**.**
2. **Save**.

Using the MyHealthRecord.com Patient-Facing Portal

20 | Using the Portal

This section gives practices using Greenway Patient Portal an overview of the MyHealthRecord.com patient-facing portal.

How to Get Here

To see these sections in action, you will need to log into MyHealthRecord.com as a Patient.

Sections

The MyHealthRecord.com patient-facing portal is divided into the following sections:

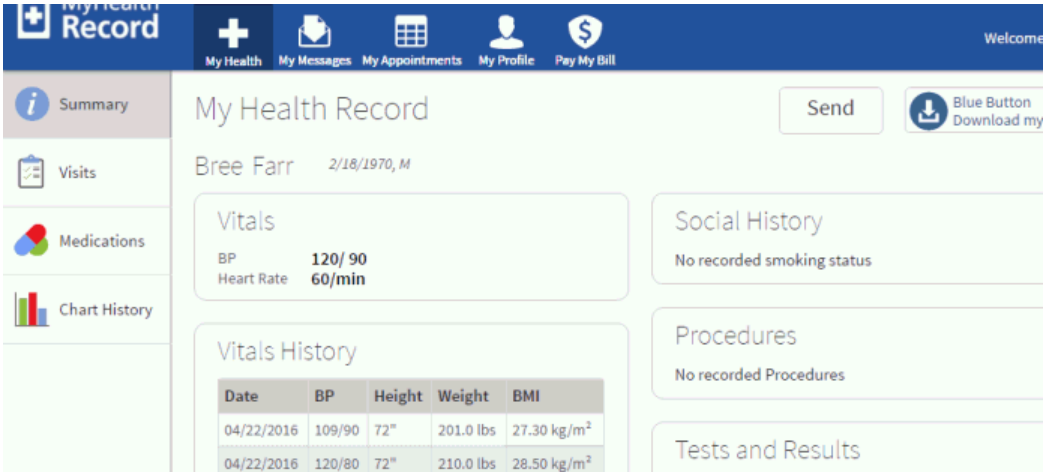
- **My Health:** This is the main section of the site, and includes all patient medical information, including medication requests and health record (CCD) downloads.
- **My Messages:** Where patients can send and receive secure communications to and from the practice.
- **My Appointments:** Where patients can see a list of upcoming appointments, and request appointments.
- **My Profile:** Information about the patient, including demographics and insurance.
- **Pay My Bill:** Allows patients to securely send their payments via the portal or third party payment options.

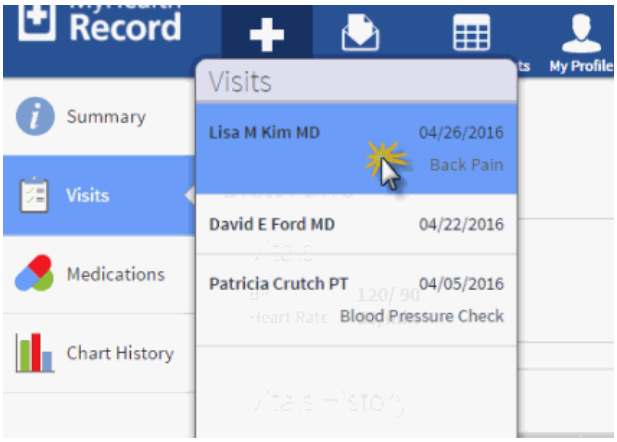
Greenway Patient Portal users with Admin rights can shape the look and feel for much of the patient-facing portal using the Portal Configuration widget.

21 | My Health

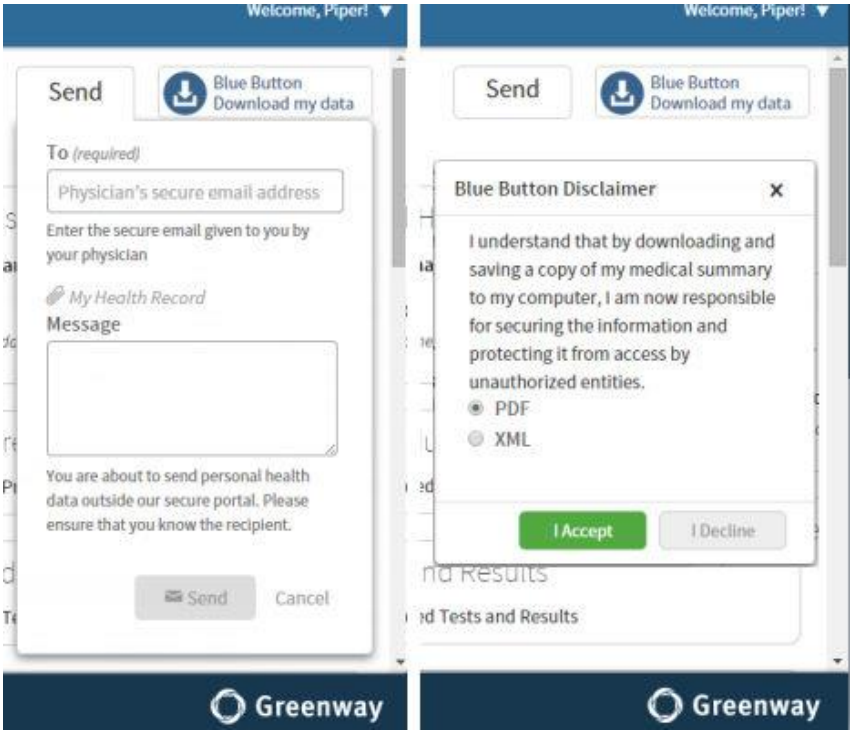
The My Health section is where patients can:

- Get an overview of the most up-to-date medical information in the **Summary** view, see a specific visit's information using the **Visits** view.

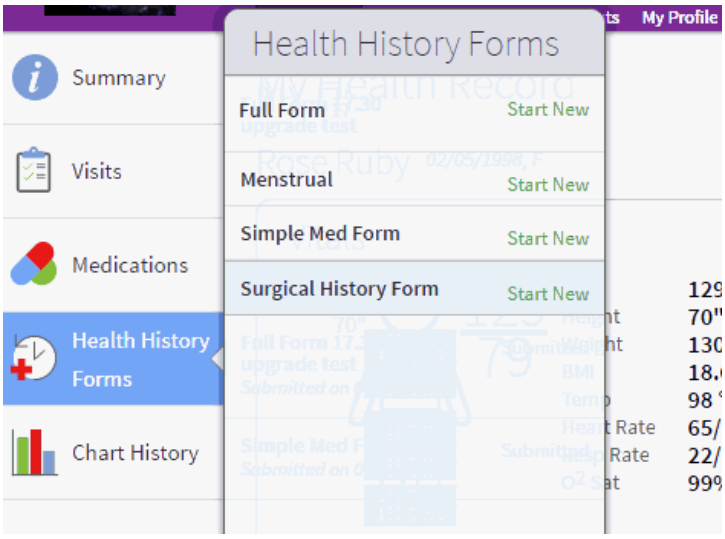




- **Send** their CCD to another care provider directly from the portal, or download their **Blue Button** data as PDF or XML. This can be done for a specific visit (from the **Visits** page) or for all visits (from the **Summary** page).

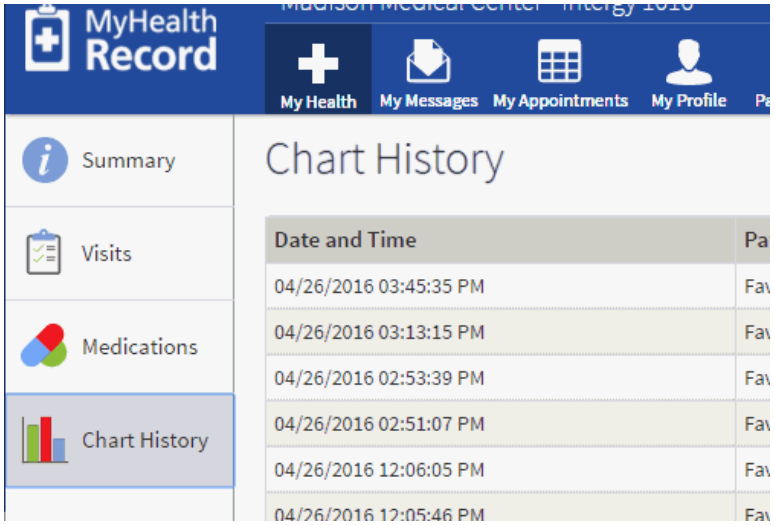


- ***Prime Suite Practices only*:** Access and complete **Health History Forms**. (This does not show up for practices using Greenway Intergy.)



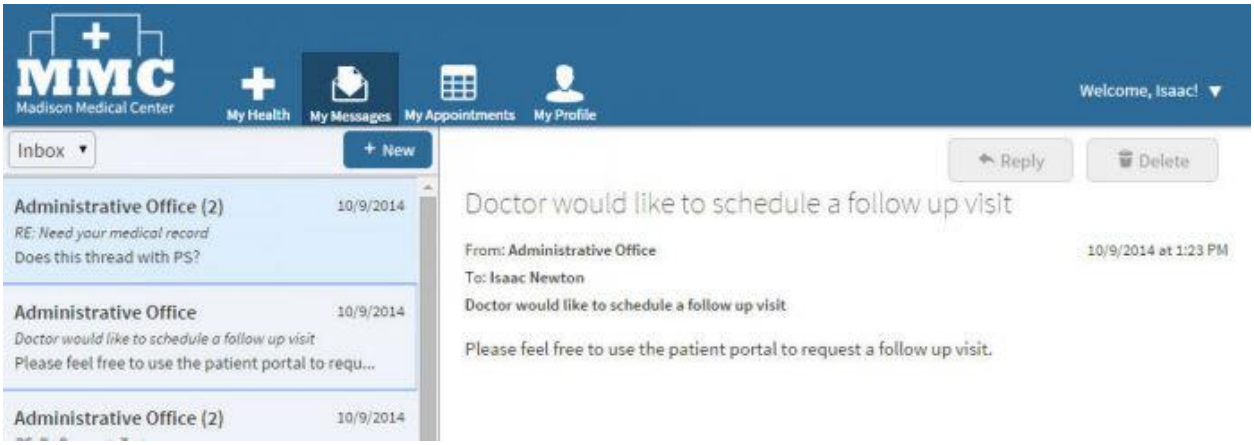
- See a list of all current **Medications** and, if the practice allows it, request refills online.

- Track when health data is viewed, downloaded, or sent to another care provider via the **Chart History**.



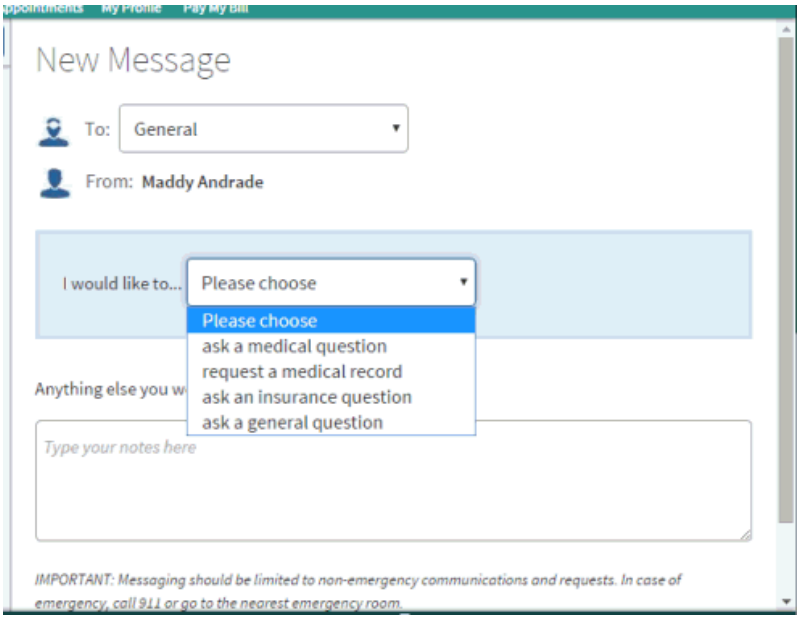
22 | My Messages

Using the My Messages function, patients can send and receive secured communication to and from the practice. Messages are divided between the *Inbox* and *Sent*.



When sending a **New** message, users can:

- Select the care provider to communicate with. (Includes only providers marked in the **Providers** page.)
- Ask questions and request records. The message fields are required to fill out will change according to what users want to do.

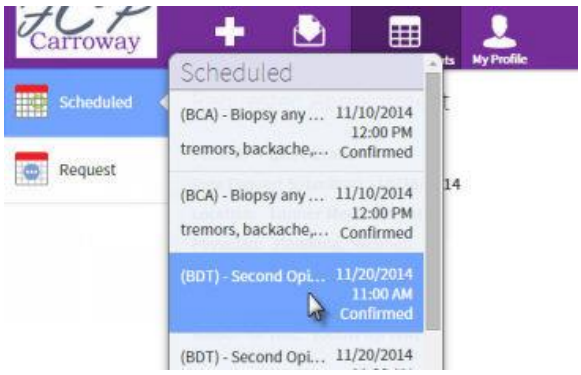


Users can also **Reply** to and **Delete** messages. Deleted messages will be removed from the user's message list, but will not be removed from the practice's internal records.

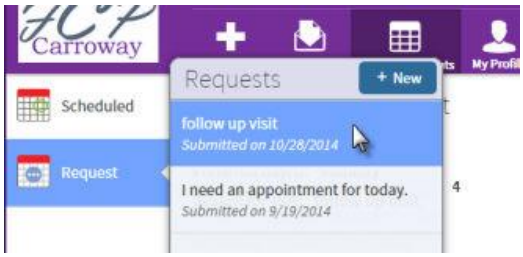
23 | My Appointments

In the My Appointments page, users can:

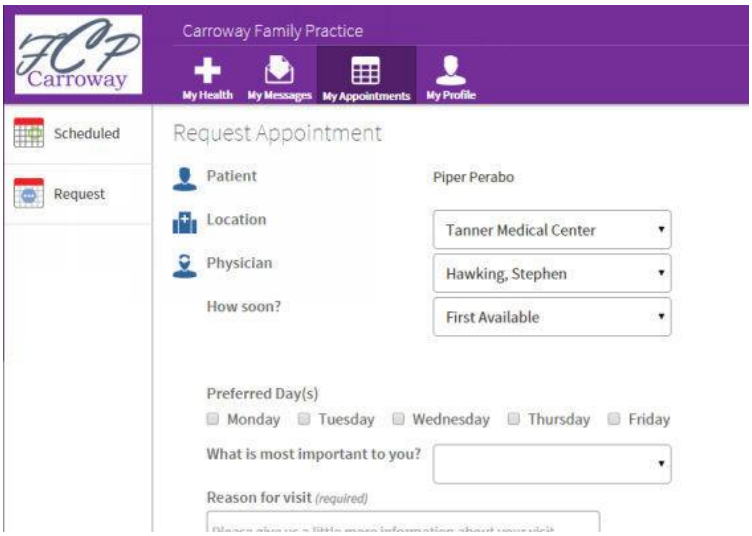
- Review their upcoming, **Scheduled** appointments. Clicking on an appointment from the Scheduled list will show its details on the page.



- See a list of appointment **Requests** which have not yet been scheduled.



- Request a new appointment, if allowed in the Appointment Preferences page.



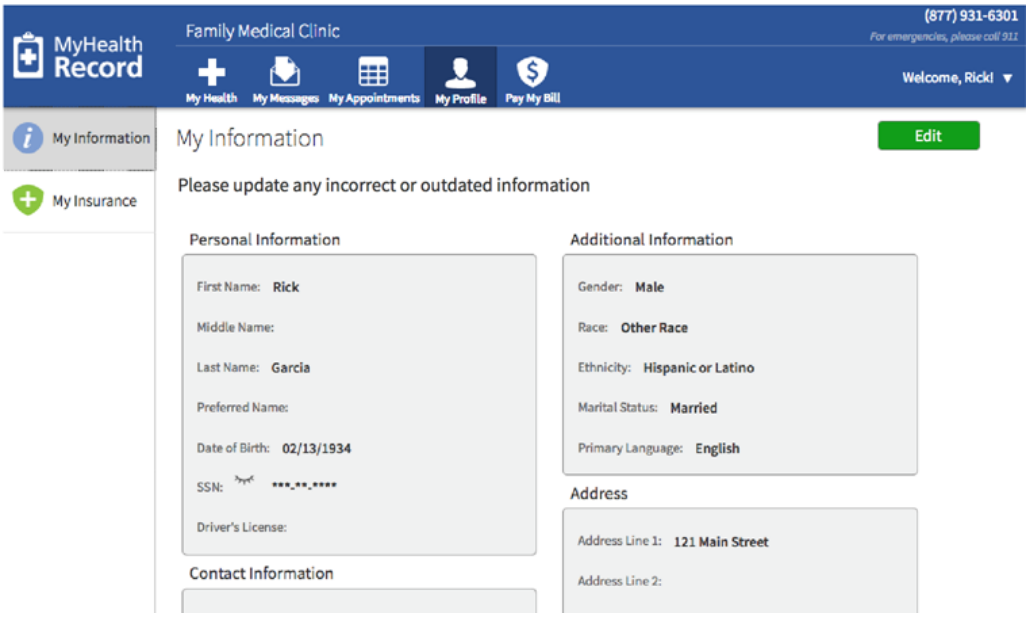
Note - *Patients can only choose the options allowed in the Appointment Preferences page.*

Note - *Physician and Location are only visible if there are some selected in the Providers and Appointment Locations pages, respectively.*

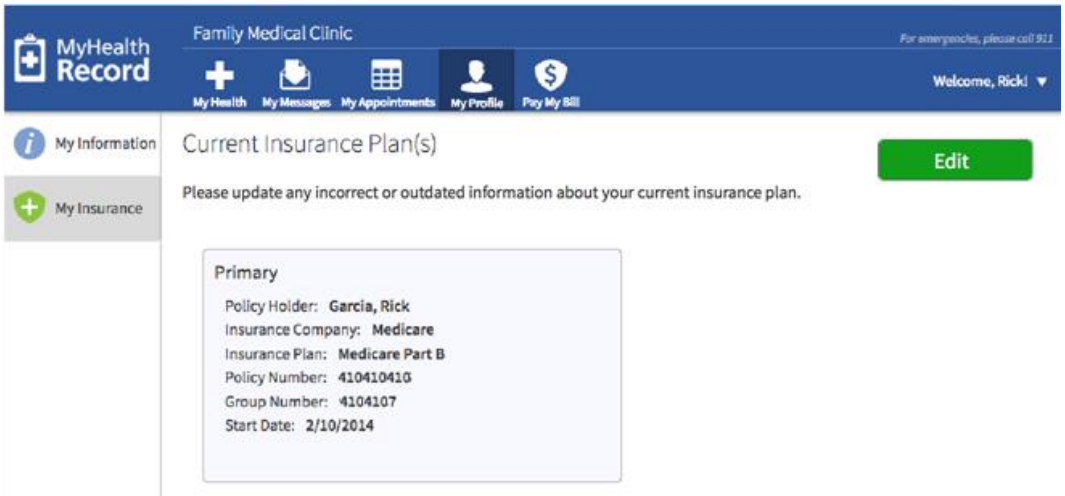
24 | My Profile

The My Profile section is divided into the following:

- **My Information:** Shows personal and contact information for the user. Default view.



- **My Insurance:** Shows insurance information for the user.



Patients can make changes by selecting **Edit**.

Note - *Changes will not show up on the portal until approved and reconciled by the practice. Changes are approved and reconciled using your EHR. For details on doing this, see your EHR's documentation.*

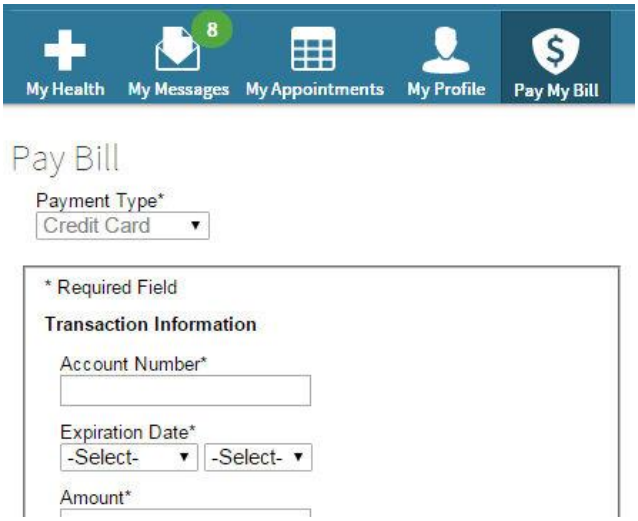
Patients can see a summary of changes submitted in the My Messages **Sent** list.

25 | Pay My Bill

The **Pay My Bill** option only shows up for patients if set up in the Enable Connections page.

If Your Practice Uses TransFirst

Selecting **Pay My Bill** opens the payment page within MyHealthRecord.com. Users can enter payment information there. When a payment is made, you will receive a message about this in your EHR's tasks list.



Note - *All communications will be secured and handled by TransFirst.*

All information marked with an asterisk (*) is required when making a payment:

- Account Number (credit card)
- Expiration Date
- Amount
- Security Code
- Address Line 1
- ZIP code
- E-mail
- CAPTCHA code

After a successful payment, you will receive an email from TransFirst.

If Your Practice Uses a Third Party for Payments

Selecting **Pay My Bill** opens a new window or tab to the address entered in the **URL** box in the Enable Connections page.

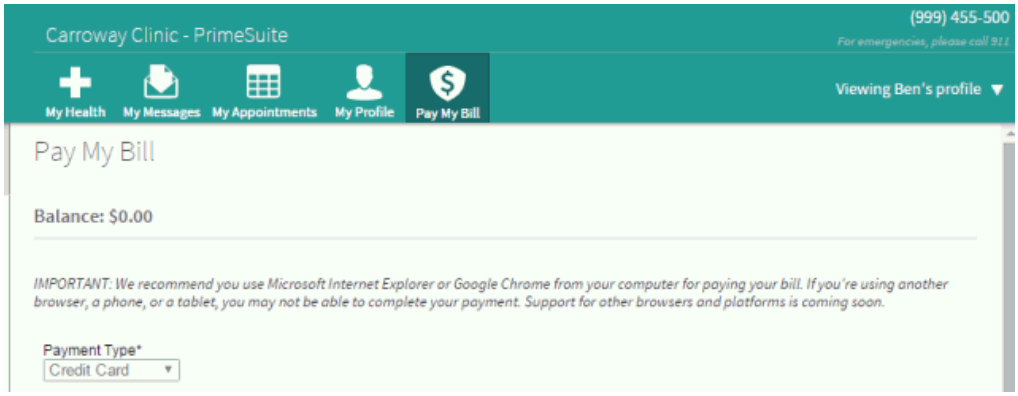
TransFirst Payment Workflow

Through our partnership with TransFirst, Greenway is able to provide an integrated payment environment for patients. This topic describes that process and what you should expect.

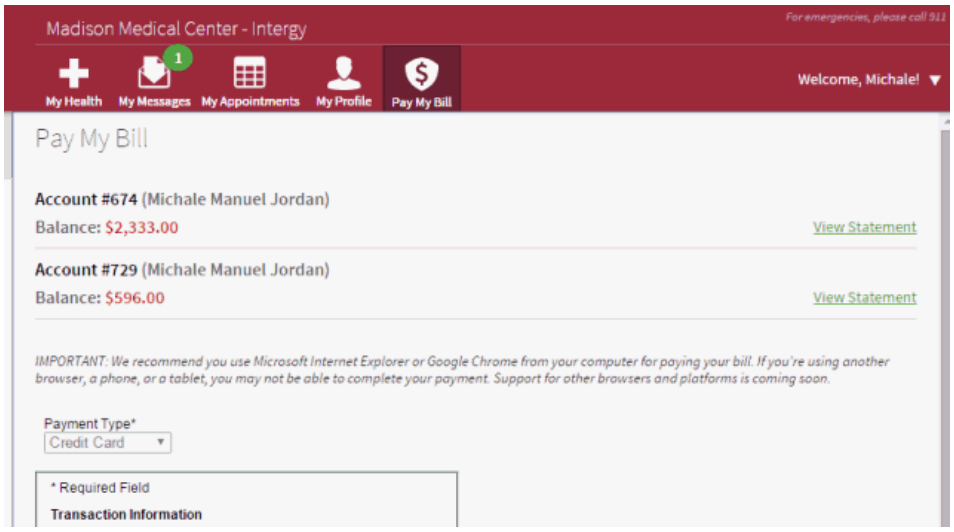
Step 1: User Payment

A MyHealthRecord.com user will go to the Pay My Bill page. After reviewing their account balance, they can fill out their credit card payment information in the TransFirst fields.

- **Prime Suite Practices** will only see one account balance, since the system requires that there be a single balance per patient.

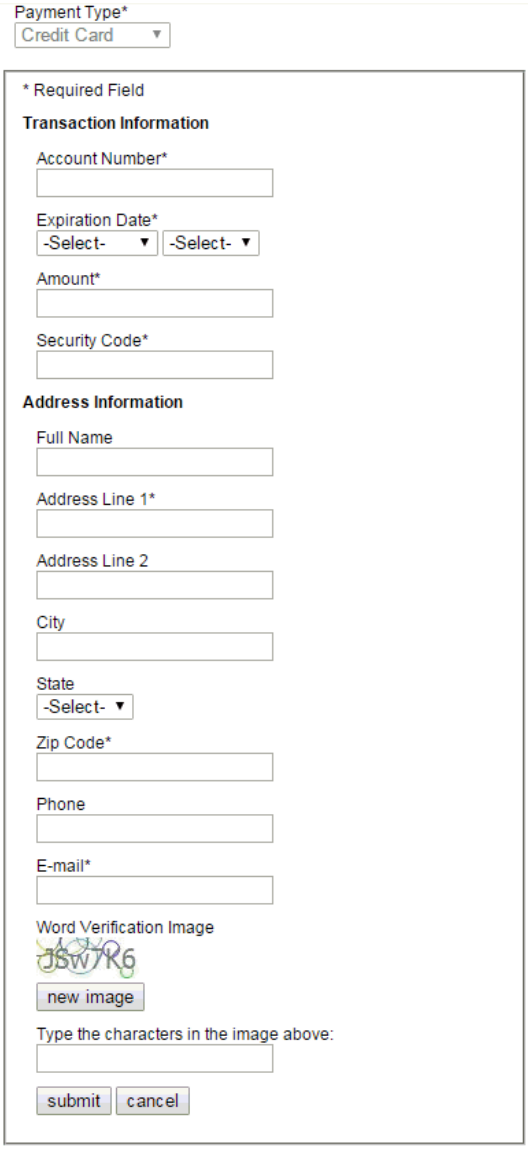


- **Intergy Practices** will see a balance for every account they're a part of within the practice, since the system allows for multiple people on the same account.



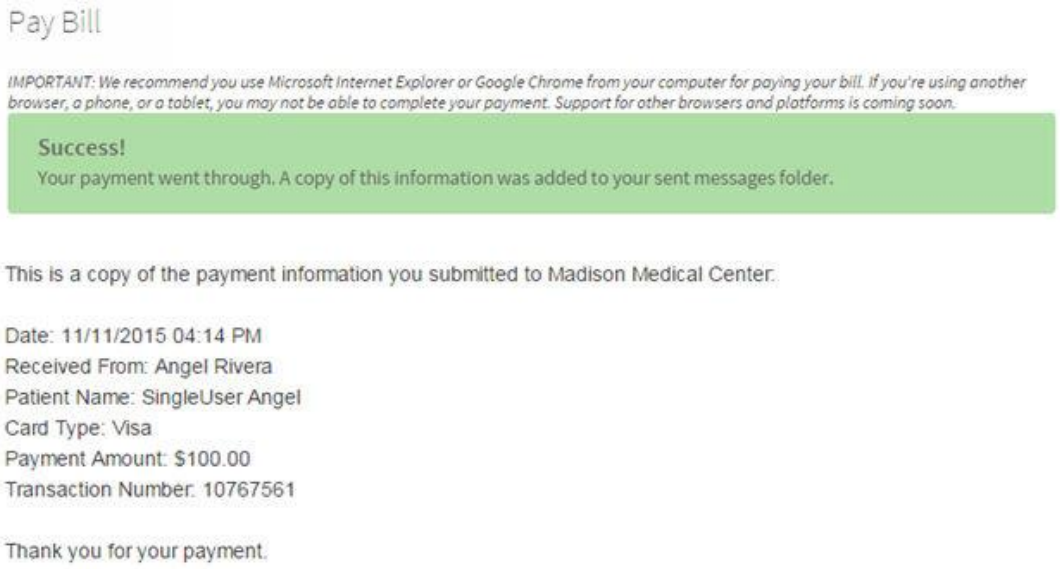
This assumes the following:

- TransFirst was correctly configured using the Enable Connections page.
- The user is using a supported browser (any recent version of Google Chrome, Microsoft Internet Explorer, or Microsoft Edge).

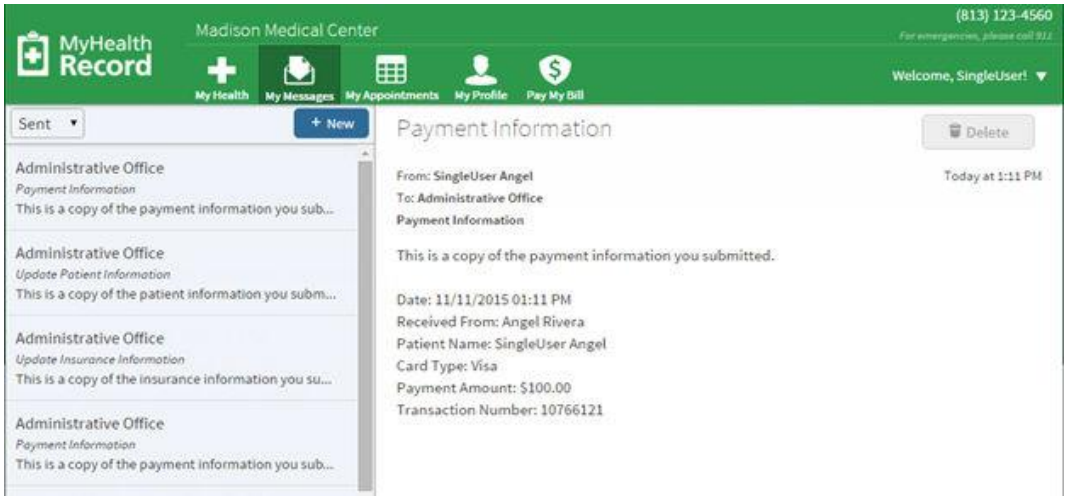


Step 2: Success Message and Receipt

After a successful payment, the user will see a success message, including a copy of the submitted information.



This information will also show up as a 'Sent' message in the user's My Messages page.



Greenway Patient Portal will also send a receipt to the patient via email.

Dear SingleUser,

This is a copy of the payment information you submitted.

Date: 11/11/2015 04:14 PM
Received From: Angel Rivera
Patient Name: SingleUser Angel
Card Type: Visa
Payment Amount: $100.00
Transaction Number: 10767561

Thank you for your payment.

Thank You,

Madison Medical Center

Note: Please do not reply to this email. If you have any questions or concerns, please contact our office. You received this email because you are registered on https://sso.viterahealthcare.com with the email address: angel.rivera@greenwayhealth.com. If you believe you received this message in error, please contact us immediately.

Note - *When you were first set up with TransFirst, the receipt functionality at TransFirst's end should have been turned off. If a patient mentions that they received two receipts for the same visit, contact TransFirst Merchant Support at 800-654-9256 and ask to have the receipt functionality turned off.*

Step 3: Tasks

After a successful payment, the practice will receive a Task in the EHR containing with the payment information.

Note - *See your EHR's help documentation for information on the Tasking functionality.*

MyHealthRecord.com and Greenway Patient Portal Frequently Asked Questions

26 | Greenway Patient Portal FAQ for Practice Users

- **How do I invite new users to the portal?**
  Users can only be invited directly from your EHR. See your EHR's help documentation for details.
- **How do I edit a user's information?**
  User information is edited using your EHR. Users can submit a change request through the portal, but all changes must be approved using your EHR. See your EHR's help documentation for details.
- **How do I link patients together? For example, a parent (who isn't a patient) and a child (who is a patient)?**
  Patient linking and unlinking can only be done using your EHR. See your EHR's help documentation for details.
- **How do I prevent a user or patient from accessing the portal? How do I remove a user's portal access?**
  Removing a user's or patient's portal access can only done using your EHR. See your EHR's help documentation for details.
- **How do I change my password?**
  Select your initials in Greenway Patient Admin Dashboard then **My Account** from the menu. In the page that opens, select **Password**. Remember, too, that any user with Admin rights can change another practice user's password using the Practice Users details view.
- **As a practice user, what if I forget my user name or password for MyHealthRecord.com?**
  Please contact Greenway support for a password reset.
- **Why can't my patients choose locations when requesting an appointment?**
  - Verify that the Appointment Locations page is set up correctly, with more than one location selected.
  - Verify that 'Show Location Options' in Appointment Preferences is checked.

  If you have done this and locations still aren't showing up, please contact technical support.
- **Why can't my patients choose a care provider when requesting an appointment, or when sending a secure message?**
  - Verify that the Providers page is set up correctly, with more than one location selected.
  - Verify that 'Show Provider Options' in Appointment Preferences is checked.

  If you have done this and care providers still aren't showing up, please contact technical support.
- **What if I can't see the location or physician selection sections of the Providers or Appointment Locations?**
  If you don't see the Location Selection or Physician Selection sections, it may mean that the portal hasn't yet been completely connected to your EHR.
- **How do I contact TransFirst?**
  You can contact TransFirst Merchant Support at 800-654-9256.

27 | MyHealthRecord.com Patient-Facing Portal FAQ

The following is a list of common questions about the MyHealthRecord.com patient-facing portal.

General

- **How do I request an appointment?**
  Under **My Appointments**, select **Request**, and select **New** to request a new appointment.
- **How do I cancel, or reschedule an appointment?**
  Please contact the practice.
- **How do I fill out health history forms requested by the office?**
  Under **My Health**, select **Health History Forms** and select a form to fill out. (You can only see the online **Health History Forms** if your doctor's office offers them.) Do this for every form you're asked to complete. Remember, if you don't have time to finish a form, click **Finish Later** in the form. This saves your answers for later. Forms that haven't been finished are marked as being 'In Progress' in the Health History Forms list.
- **How do I request a medication prescription refill?**
  Under **My Health**, select **Medications**. There, you can select the **Refill Medications** button. Note that the **Refill Medications** button will only show up if your practice takes online refill requests at this time. If this button is not there, you will need to call the office directly.
- **How do I ask a question of my physician or the office?**
  Under **My Messages**, select **New**, and from the **I would like to…** list, choose the appropriate question.
- **Where do I see my lab results?**
  Lab results will display under **My Health**, in the **Summary** page, under the **Tests and Results** section. If you do not see your lab results, contact your care provider.
- **Two or more of my care providers use MyHealthRecord.com. Do I have to make a different login for each?**
  No. You can access both sets of records using one login to MyHealthRecord.com, and switch between them using the **Welcome** or **Viewing** menu in the Navigation bar ("*Welcome, Jason*" or "*Viewing Jessica's Profile*").
- **Why can't I see attachments on my messages?**
  Make sure that cookies are enabled on your browser.
- **How do I pay my bill?**
  If your provider accepts online payments, you will see a **Pay My Bill** option in the Navigation bar.

Medical and Health Records

- **How do I request my medical records?**
  Under **My Messages**, select **New** and from the **I would like to…** list, choose '*request a medical record*'.
- **How can I see my medical summary? How do I send this to another medical practice?**

  - You will see your medical **Summary** as soon as you log in to MyHealthRecord.com.
  - To send your medical information, use the **Send** button. Be sure to read the on-page instructions carefully. If you don't know the email address, you will need to ask the physician you are trying to send your records to.
  - To download your medical record, use the **Blue Button**. You can save information to an SD card, or a thumb drive, and give it to the other practice by hand.
- **How can I see the records for a specific visit? How do I send this to another medical practice?**
  - After logging into MyHealthRecord.com, select **Visit** from the menu and pick a visit from the list.
  - To send this visit's information, use the **Send** button. Be sure to read the on-page instructions carefully. If you don't know the email address, you will need to ask the physician you are trying to send your records to.
  - To download this visit's information, use the **Blue Button**. You can save information to an SD card, or a thumb drive, and give it to the other practice by hand.
- **How do I download my health record?**
  Under **My Health**, in the **Summary** page, select the **Blue Button** to download your health record as shown. You can choose to download it as a PDF or XML file. Choose PDF to make it easy to print. Choose XML to make it easy for the physician's office to import your record into their system.
- **How do I see my child's health record?**
  Click on your name on the main menu. If you have access to your child's health record you will see their name in the list. If not, please contact the office.
- **I am a caregiver. How do I see my loved one's health record?**
  Click on your name on the main menu. If you have access to your loved one's health record you will see their name in the list. If not, please contact the office.

Updating My Information

- **How do I see and update my contact information?**
  Under **My Profile**, select **My Information** to see your contact information as recorded by the office. To make changes, scroll to the bottom and select the link to enable edit mode.
- **How do I see and update my insurance information?**
  Under **My Profile**, click **My Insurance** to see your insurance information as recorded by the office. To make changes, scroll to the bottom and select the link to enable edit mode.
- **How do I change my password?**
  Select the **Welcome** or **Viewing** menu in the Navigation bar ("*Welcome, Jason*" or "*Viewing Jessica's Profile*") and select **My Account Settings**. In the page that opens, select the Edit link next to Password.
- **What if I forget my user name or password?**
  On the MyHealthRecord.com login page, click **Forgot Username** or **Forgot Password** and follow the steps in the screens that follow.