

PCA Patient Self-Help Guide: Additional Web Portal Features





Additional Web Portal Features

This is a step-by-step guide on the additional features you can access within your web portal.

Before using this guide, please make sure that you have followed the onboarding guides to set up your online patient account and have successfully logged into the web portal with your credentials.





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Overview

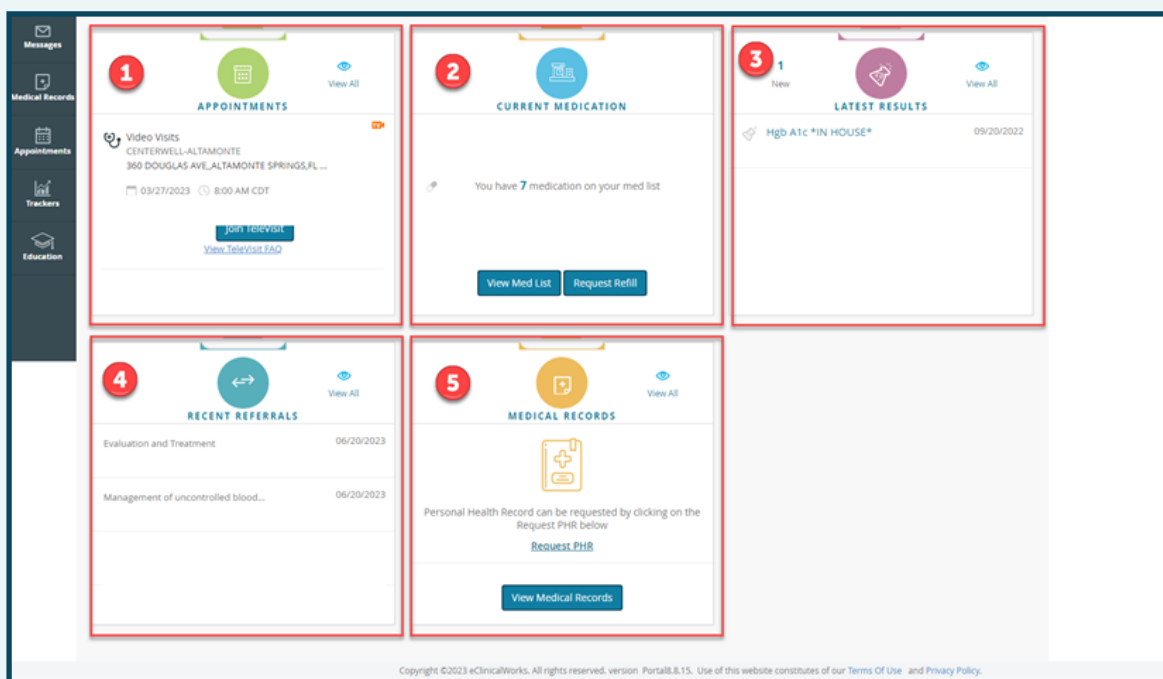
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Portal Dashboard

Your portal Dashboard will show a quick snapshot of key information from your patient record. This will always be the first page displayed when you successfully log into your web portal, and you can navigate to the following features directly from the snapshot icons:

1. Upcoming appointments (viewing details and joining TeleVisits)
2. Current medications (viewing details and requesting refills)
3. Past lab and diagnostic results that have been reviewed and released by your PCP
4. Recent referral orders from your PCP
5. Ability to request a copy of your Personal Health Record





Account Management

From the **My Account** tab on the left sidebar, you can access several features that allow you to manage your online patient account.

| | | |
|-----------------|------------------------|---|
| My Account | Personal Information | 1 |
| | Additional Information | |
| Messages | Reset Password | 2 |
| Medical Records | Past Statement | 3 |
| | Transmit Logs | 4 |
| Appointments | Health Access Logs | |
| Trackers | My Devices | 5 |

1. Request changes to your patient information (**NOTE:** These must be confirmed and processed by your provider's office before they reflect in your account)
2. Change your password (**NOTE:** If you are having trouble resetting your password, please call our office at **561-823-3821, extension 1 on Mondays-Fridays, 8am-5pm** to get a password reset)
3. View past billing statements (e.g., copayment records, when published by your provider's office)
4. View logs of access your health information (e.g., if you exported your medical records)
5. Access a list of the mobile devices where you've installed the healow© App (**NOTE:** From this page, you can reset the healow© App pins for each device if you get stuck logging in)

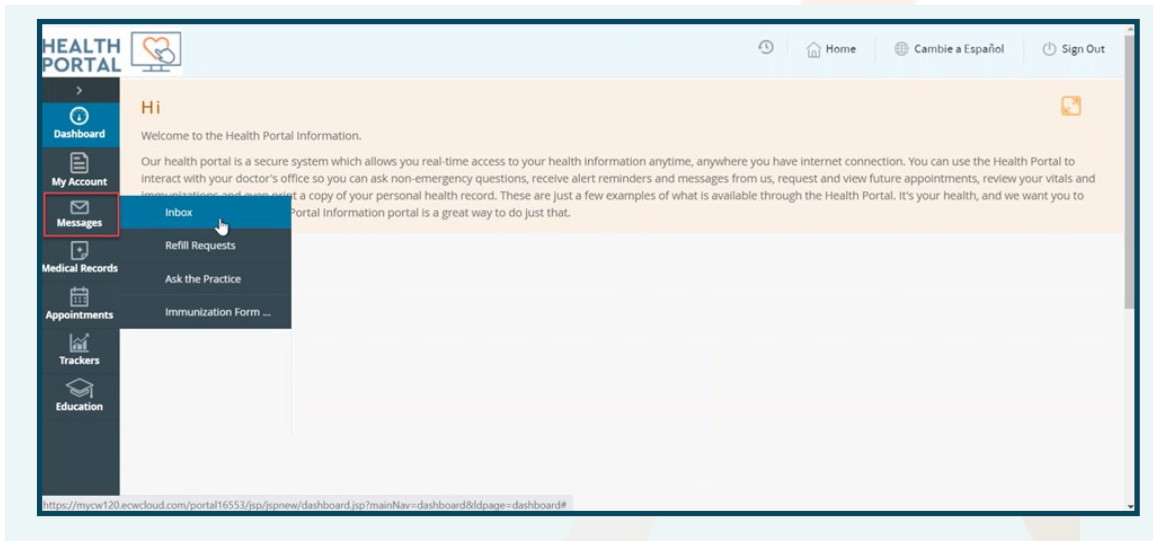


Contacting Your Care Team

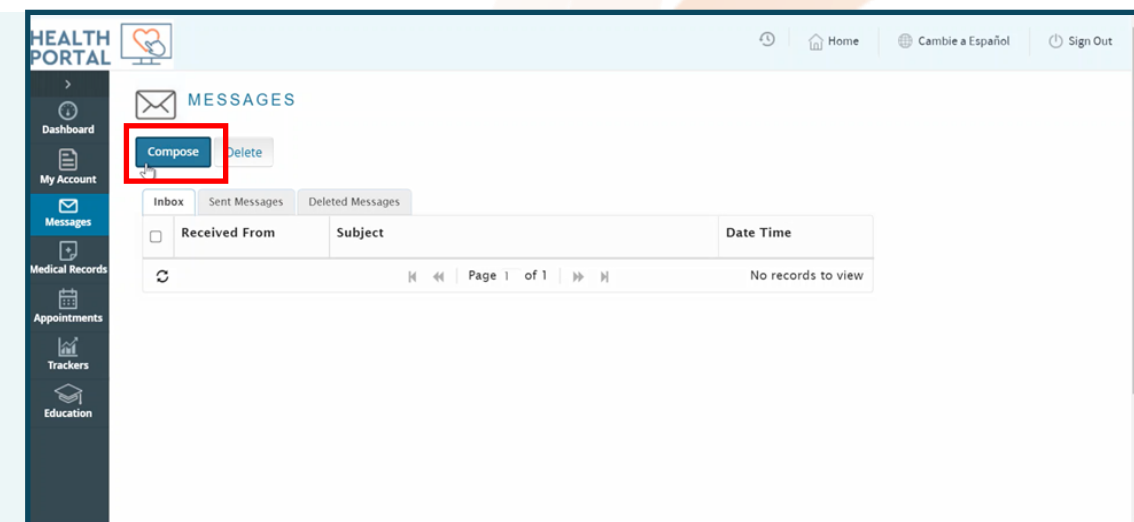
Contacting your Care team is made convenient via your web portal.

Sending messages via your web portal

1. Hover your **Messages** tab to view various ways to contact your care team within the portal, including viewing your inbox and sending any non-urgent messages.



2. Any non-urgent message can be composed to your care concerning your healthcare by clicking **Compose**.





Contacting Your Care Team

Contacting your Care team is made convenient via your web portal.

Sending messages via your web portal

3. Send a message to your Care Team by filling out all the appropriate fields. Then click **Submit**.

Subject: *

Question about my referral

Message: *

Hi, I had a question about the referral that was put in during my last visit. |

Submit Cancel

4. View the message you just sent by going back to your Inbox and clicking the **Sent Messages** tab.

MESSAGES

Compose Delete

Inbox **Sent Messages** Deleted Messages

| | Sent To | Subject | Status | Date Time |
|--------------------|---------|---------|--------|-----------|
| No records to view | | | | |

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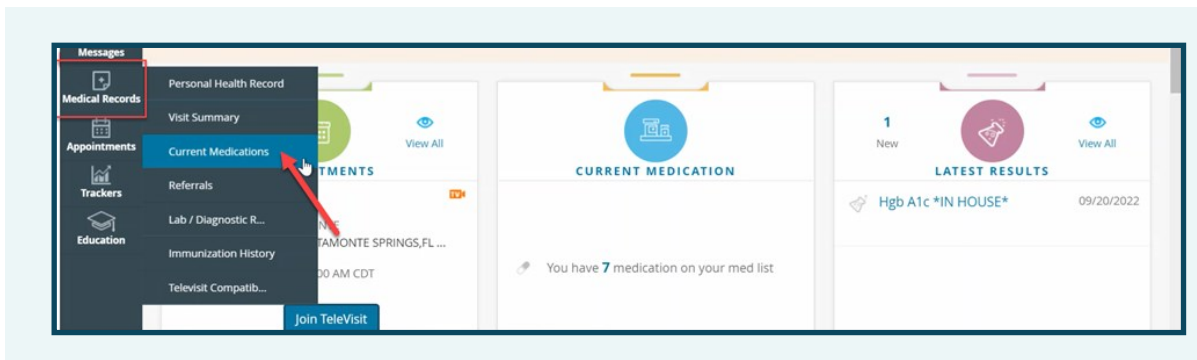


Medication List & Refill Requests

Medications

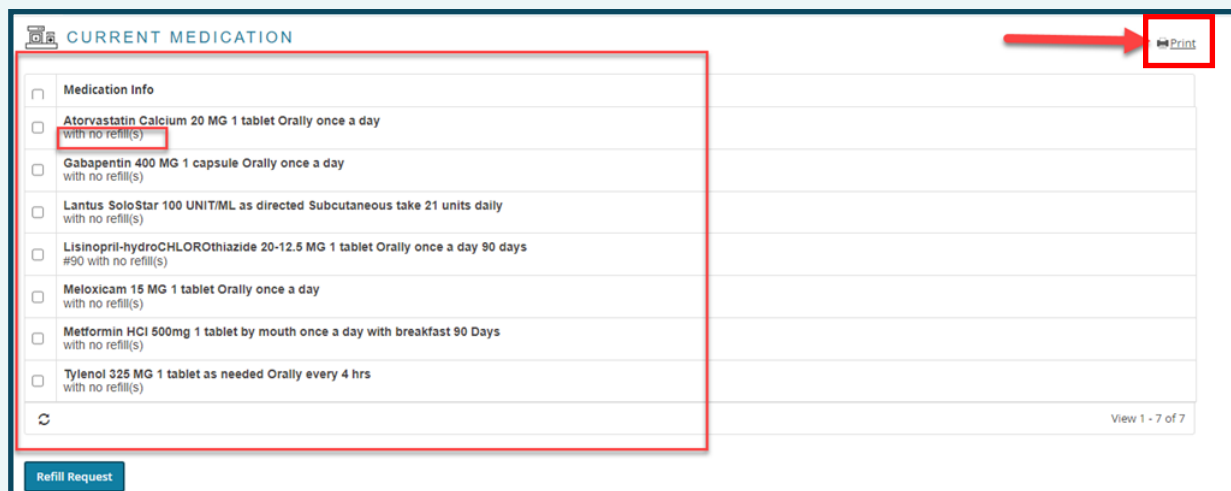
All current medications located within your patient chart can be viewed under the **Current Medications** section.

1. On your portal home page hover over **Medical Records**.
2. Then click **Current Medications**.



This will open your current medication list and instructions. You will also be able to see if there are any more refills attached to the prescription.

You can also print your medication list if needed.





Medication List & Refill Requests

Refill Requests

Refills can be requested either under on the **Current Medication** page or the **Request Refills** option under the Messages tab (both lead you to the same place).

1. Check the box by the medication you are needing refills for, then click **Refill Request**.

CURRENT MEDICATION

| Medication Info |
|--|
| Atorvastatin Calcium 20 MG 1 tablet Orally once a day with no refill(s) |
| Gabapentin 400 MG 1 capsule Orally once a day with no refill(s) |
| Lantus SoloStar 100 UNIT/ML as directed Subcutaneous take 21 units daily with no refill(s) |
| Lisinopril-hydroCHLORothiazide 20-12.5 MG 1 tablet Orally once a day 90 days #90 with no refill(s) |
| Meloxicam 15 MG 1 tablet Orally once a day with no refill(s) |
| <input checked="" type="checkbox"/> Metformin HCl 500mg 1 tablet by mouth once a day with breakfast 90 Days with no refill(s) |
| <input type="checkbox"/> Tylenol 325 MG 1 tablet as needed Orally every 4 hrs with no refill(s) |

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Refill Request

2. Select your appropriate facility and your provider at the top of the screen.

Current Medication > New Refill Request

REFILL REQUEST

Facility:

Provider:

Subject:



Medication List & Refill Requests

Refill Requests

3. Confirm that the pharmacy you would like your prescription to go to is correct. If not, it can be changed via the drop down. Also confirm the medication that you are requesting refills for is correct.

New Refill Request

Pharmacy:
Walgreens #00101 , 3382 CASTRO VALLEY BLVD, [510-537-0072], CASTRO VALLEY, CA, 94546

Search pharmacy using: Pharmacy Name, City, State, Zip To search for CVS in Westborough enter : CVS,Westborough

Medications:
Metformin HCl 500mg 1 tablet by mouth once a day with breakfast 90 Days with no refill(s)

Message:

Comments:

Submit Cancel

4. Optionally, you can add any additional comments within the message to relay about your refill request to your care team. Then click **Submit**.

Walgreens #00101 , 3382 CASTRO VALLEY BLVD, [510-537-0072], CASTRO VALLEY, CA, 94546

Search pharmacy using: Pharmacy Name, City, State, Zip To search for CVS in Westborough enter : CVS,Westborough

Medications:
Metformin HCl 500mg 1 tablet by mouth once a day with breakfast 90 Days with no refill(s)

Message:
Comments: Hi I only have 2 pills left of my medication,

Submit Cancel

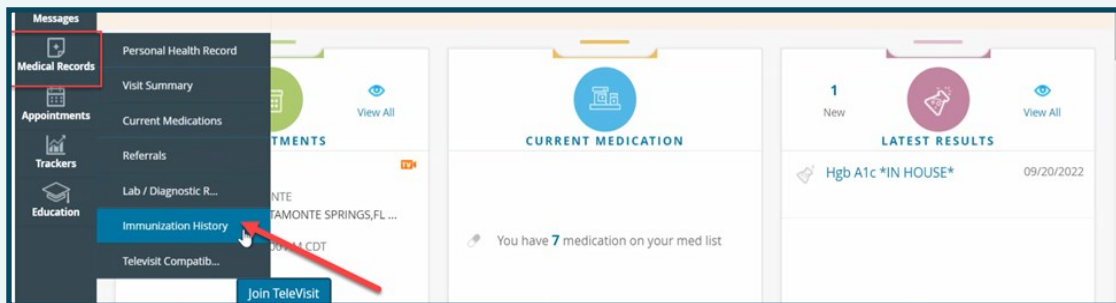


Immunization History & Requests

Immunization History

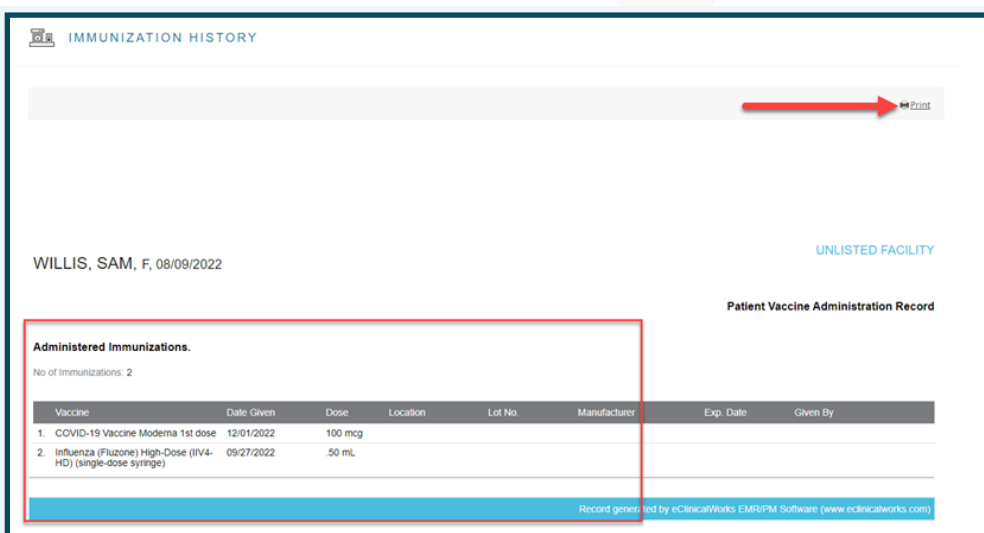
Your past vaccination record can be accessible to view or print if entered within your patient chart under the Immunization History section.

1. On your portal home page hover over **Medical Records**.
2. Then click **Immunization History**.



This will open vaccine records for all historical immunizations documented within your PCA patient chart.

The immunization history can be viewed by printing or by viewing the details on the screen.

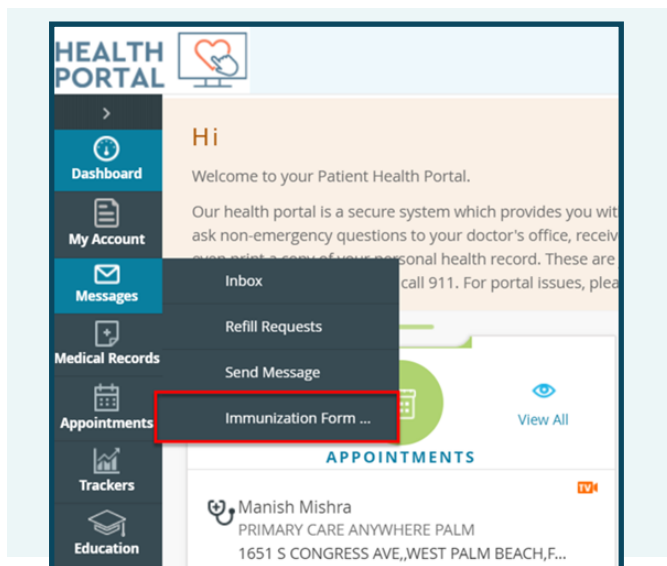




Immunization History & Requests

Immunization Form Request

If you would like to receive a new immunization form, you can make a request from the portal by selecting **Immunization Form...** on the **Messages** tab.



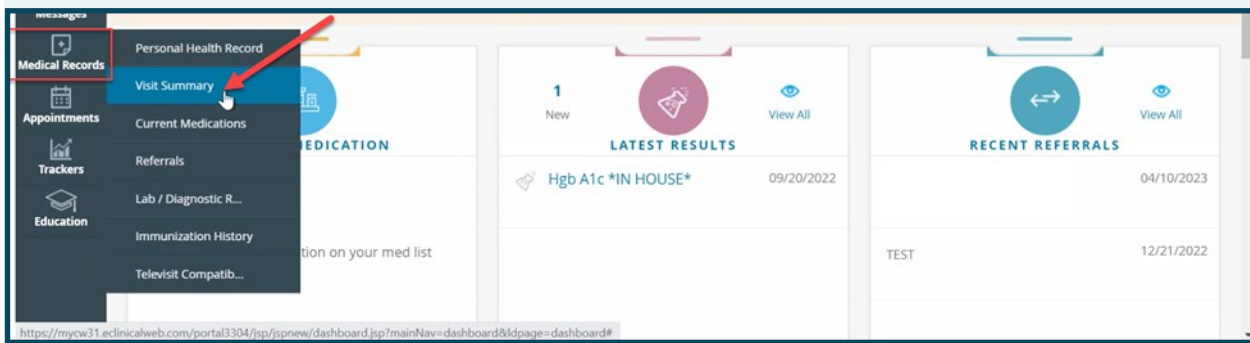
This will open a messaging form with a prepopulated message about requesting a new immunization form.

Simply select your facility and provider, and then click **Submit**.

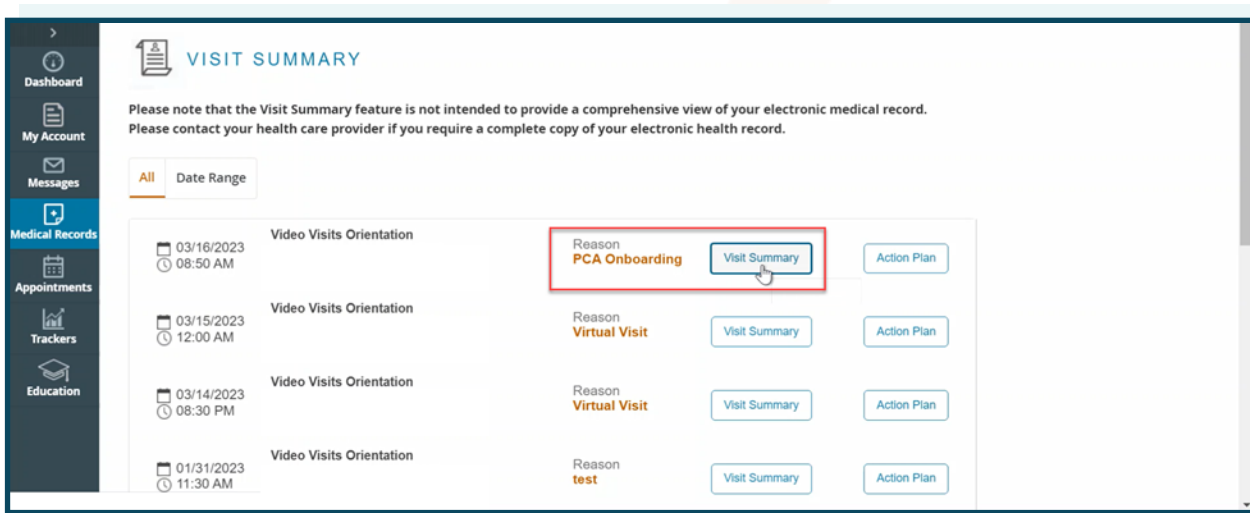
Visit Summary

After a visit with your care team member, you can see all the details of what was addressed by viewing your **Visit Summary**.

1. On your portal home page hover over **Medical Records**.
2. Then click **Visit Summary**.



3. You will see all past visit encounters on this page, and you can specify a specific date range to filter the results. Click on the **Visit Summary** box to view the details.

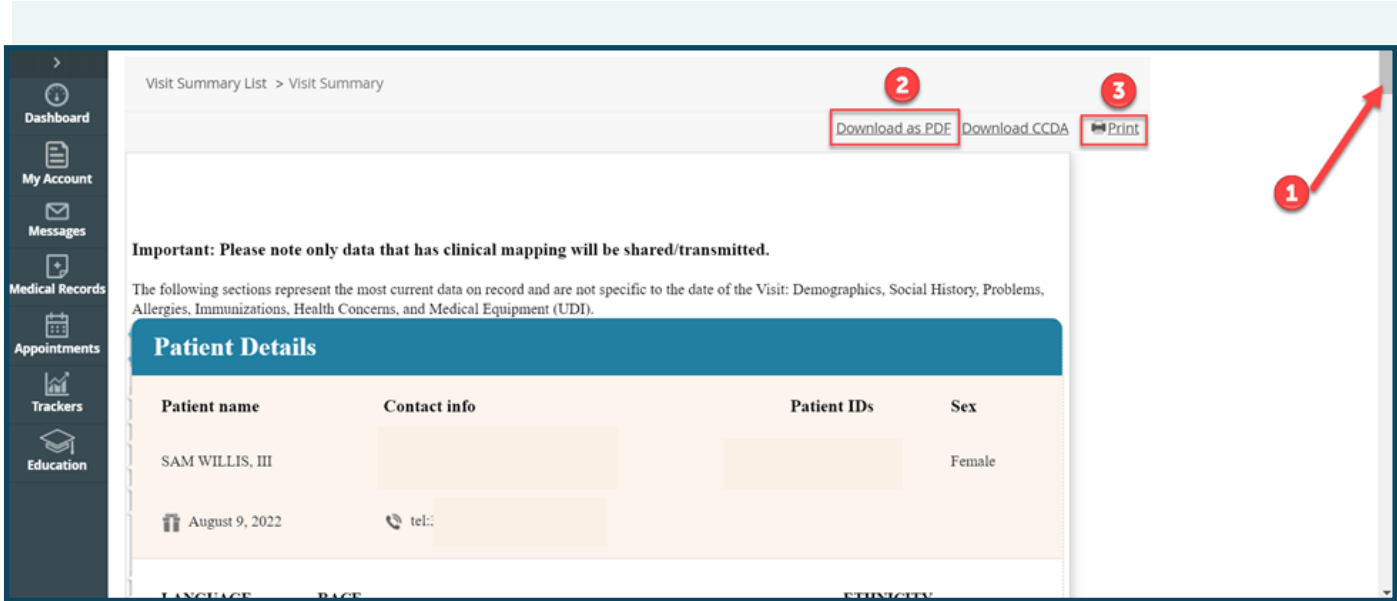


This will open a comprehensive summary of the specific visit that was chosen.

Visit Summary

The summary can be viewed by:

1. Scrolling down the webpage.
2. Downloading and viewing as a PDF.
3. Printing the document.





Visit Summary List > Visit Summary

[Download as PDF](#) [Download CCDA](#) [Print](#)

Important: Please note only data that has clinical mapping will be shared/transmitted.

The following sections represent the most current data on record and are not specific to the date of the Visit: Demographics, Social History, Problems, Allergies, Immunizations, Health Concerns, and Medical Equipment (UDI).

Patient Details

| Patient name | Contact info | Patient IDs | Sex |
|--|--|-------------|--------|
| SAM WILLIS, III | | | Female |
|  August 9, 2022 |  tel: | | |

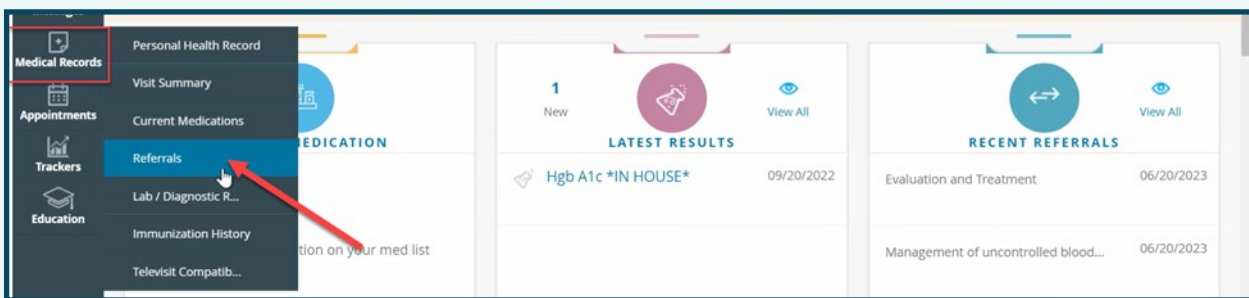
LANGUAGE PAGE ETHNICITY



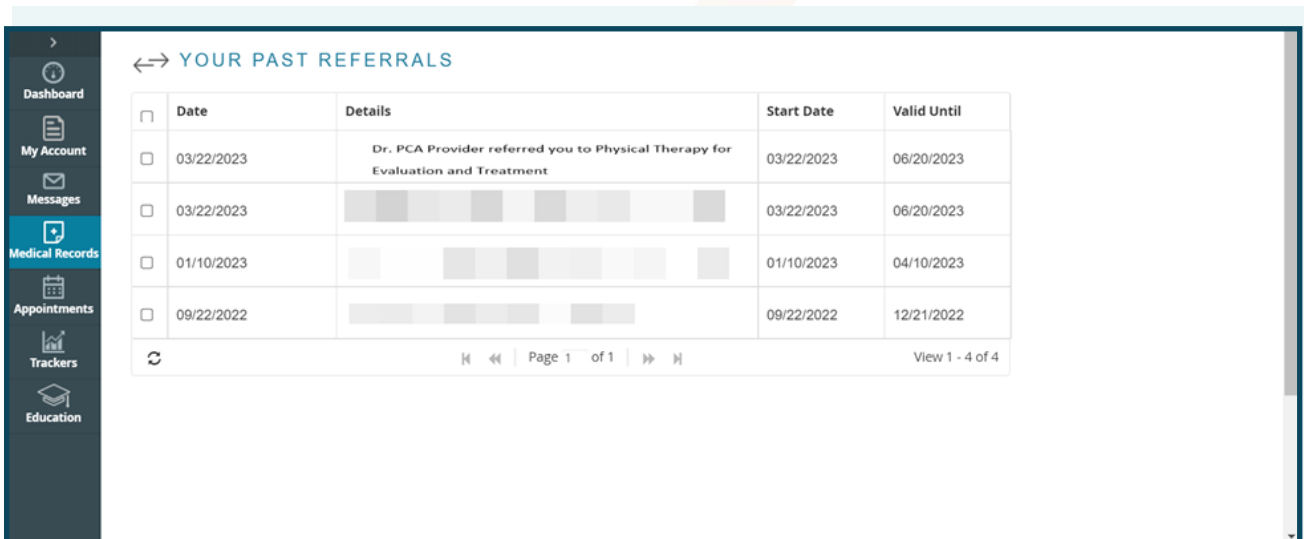
Referral History

All past referrals that were ordered by your PCP will be viewable under the **Referrals** section.

1. On your portal home page hover over **Medical Records**.
2. Then click **Referrals**.



You will be navigated to a page with a list of all past and current referrals. If you would like to request a new referral or check on the status of an existing referral, please call our office at **561-823-3821, extension 1 on Mondays-Fridays, 8am-5pm.**

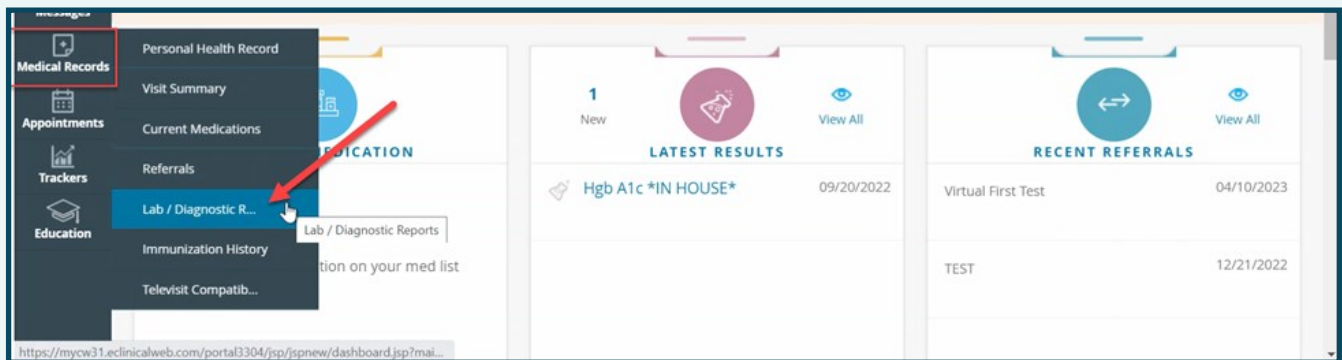





Lab Results

Any lab or diagnostic reports that have been reviewed and released by your PCA provider will be shown under **Lab / Diagnostic Reports**.

1. On your portal home page hover over **Medical Records**.
2. Then click **Lab / Diagnostic Reports**.








3. You will see all past results that have been released and reviewed by your PCP. Click on the **blue hyperlinked report name** for the appropriate order to review the details.

 **YOUR LAB / DIAGNOSTIC REPORTS**

Please note: Below are results that have been reviewed by your provider. Additional results (not yet reviewed) may also be available in the Visit Summaries and in your PHR results.

| Result Date | Order Date | Name | Reason | Notes |
|-------------|------------|------------------------------------|--------|-------|
| 09/22/2022 | 09/20/2022 | Hgb A1c *IN HOUSE* | | |

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Lab Results

4. This will open the result details for the specific order that was chosen. The results can be viewed on the or printed by clicking in the top right corner.

Details

Print

Video Visits Orientation
General Practice

RESULT

Patient
Sam Willis

DOB
08/09/2022

Address
.

Phone
.

Ordered Date
09/20/2022

Test Name
Hgb A1c *IN HOUSE*

Assessments

| Name | Value | Reference Range |
|----------------|-------|-----------------|
| Hemoglobin A1c | 7.8 | |

Result

Received Date
09/22/2022



Trackers

To navigate to the trackers feature, hover over the **Trackers** tab and select one of the two options:

1. View a list of reminders that your care team has flagged as needing to be completed.
2. Access a feature that allows you to track your biovitals directly in the web portal, either manually or via direct connection to a subset of compatible smart devices.

HEALTH PORTAL

REMINDERS

| Test Name | Last Done | Due |
|-----------------------|-----------|---------------|
| Hepatitis C Screening | | Currently Due |
| PVR Screening | | Currently Due |
| UACR | | Currently Due |
| Shingrix | | Currently Due |
| Spirometry | | Currently Due |
| Tdap Vaccine | | Currently Due |
| AAA Screening | | Currently Due |

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Reminders 1

Trackers 2



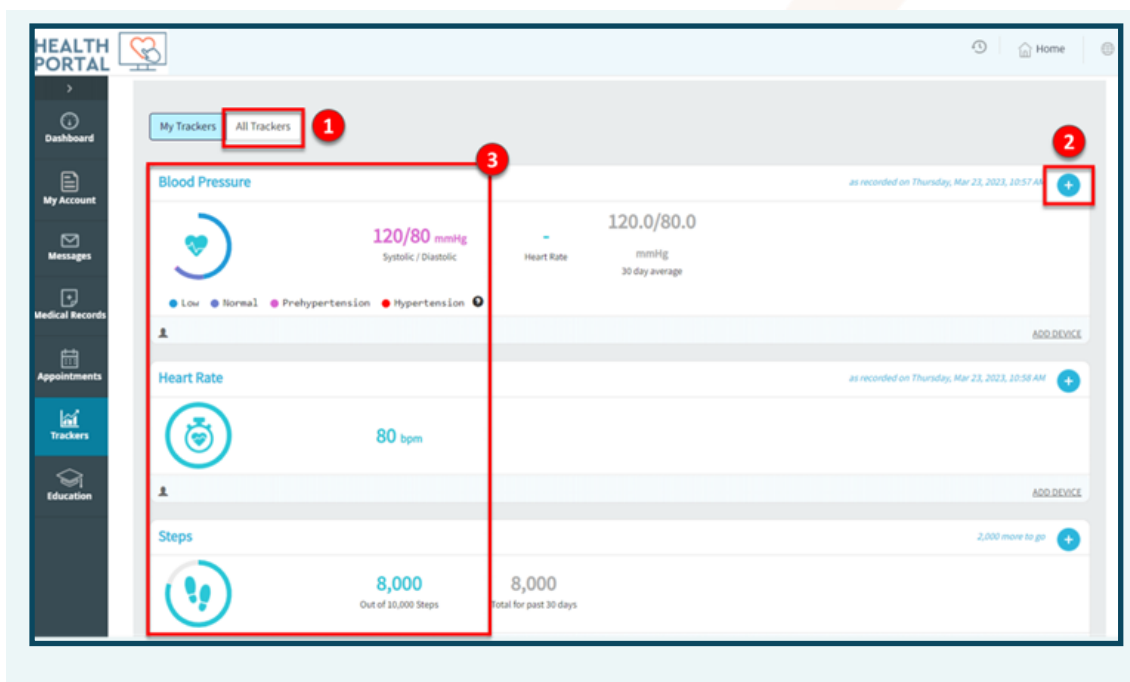
NOTE: This **Trackers** feature is entirely optional to use based on your personal preferences. We only recommend this feature for **ADVANCED** technology users. The data you provide will **NOT** be actively monitored by your care team. If you do decide to collect this data, please inform your care team directly when you want them to review your biovitals data trends.



Trackers

When you click on **Trackers**, you will navigate to a page where you can see all of your currently tracked biovitals. For new patients, this page will be empty until you start inputting / collecting data.

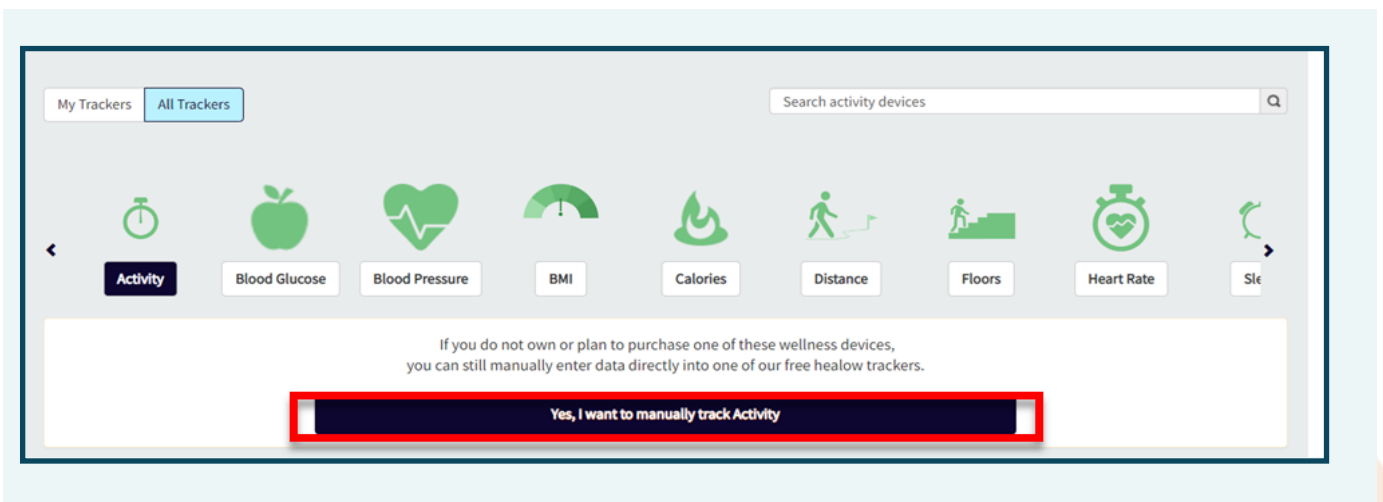
1. Click on the **All Trackers** tab to see a list of all the different biovitals you can track within the portal, as well as the option to manually input data (see further in this section for more details).
2. Click on the **blue plus sign** in the top right corner of an existing biovital section to input additional data manually.
3. You can also click anywhere in the row of the specific biovital section to access the manual data entry pop-up, as well as the historical trend data for that biovital (see further in this section for more details).





Trackers

When you click on the **All Trackers** tab, you will navigate to a view of all the different biovitals that can be tracked in the portal. Clicking on any of the biovitals will reveal which devices are compatible for automatic syncing. You will need to connect your device account with your web portal account in order to begin the sync. To manually track any metric, simply click on the biovital of your choice and then click **Yes, I want to manually track Activity**.





Trackers

When you click on the **blue plus sign** on the main trackers page, or click on any of the individual biovital sections, you will see a pop-up with details on that metric:

1. Use the **New Entry** section to input new data for that biovital manually.
2. Use the **Logs** section to view and modify past entries, which will be graphed in visual form to the left.

Blood Pressure

Readings from this device may be available to any practice that you've linked, but this information is not monitored. If you have a reading that concerns you, consider contacting your doctor's office.

New Entry

Date: 03/23/2023 Time: 11:11 AM

Systolic / Diastolic (mmHg)

Heart Rate (bpm)

e.g 122/85

Average 7 days 30 days 90 days

120.0/80.0

What does this mean?
As per the American Heart Association

| Category | Systolic | And | Diastolic |
|------------------------|----------|----------|-----------|
| Normal | < 120 | And | < 80 |
| Prehypertension | 120-129 | And | < 80 |
| Hypertension (Stage 1) | 130-139 | Or | 80-89 |
| Hypertension (Stage 2) | > 140 | Or | > 90 |
| Hypertensive Crisis | > 180 | And / Or | > 120 |

LOGS

| Source | Date Time | Systolic | Diastolic | Heart Rate | Notes |
|--------|----------------|----------|-----------|------------|-------|
| | 03/23 10:57 AM | 120 | 80 | - | - |
| | 03/22 03:43 PM | 120 | 80 | - | - |



Patient Education

To navigate to patient educational resources, hover over the **Education** tab and select one of the two options:


1. View a list of patient education directly sent to you by your care team
2. Access a digital encyclopedia of health education resources, where you can search for any topic you are interested in learning about (e.g., diabetes management)





Patient Education

When you click **Patient Education**, you will see a list of all educational material that was released to your portal for your view. Multiple educational materials may have been released related after one appointment. Confirm the date of the visit and click on the **blue hyperlinked description** in order to review the specific educational content.



PATIENT EDUCATION LIST

| Enc Date | Reason Of Visit | Description |
|------------|-----------------|--|
| 01/31/2023 | Hypertension | Pulmonary Hypertension: Care Instructions |
| 01/31/2023 | | Learning About High Blood Pressure |
| 01/10/2023 | | Learning About Diabetes and Your Teeth |
| 01/10/2023 | | Learning About Meal Planning for Diabetes |
| 01/10/2023 | | Low Sodium Diet (2,000 Milligram): Care Instructions |
| 01/10/2023 | | Learning About High Cholesterol |

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You have reached the end of this guide.