

# PCA Patient Onboarding Help Guide: Web Portal





# Welcome to your new Web Portal!

This is a step-by-step guide to set up your web portal account and access the web portal.

After reading through this guide, you will be able to join your first TeleVisit.

You will learn how to conduct a TeleVisit compatibility check, view your first scheduled onboarding TeleVisit, and practice joining a TeleVisit.

Finally, you will learn the steps to contact your Care Team by sending a message via your web portal.





# Table of Contents

## Overview

Welcome and phone number	4
Getting Started	5
Setting up your web portal account	5
Subsequent web portal access	6
Joining your first Televisit	11
TeleVisit Combability Check	11
Viewing your first scheduled onboarding Televisit	13
Practice joining your first scheduled onboarding TeleVisit	14
Contacting Your Care Team	16
Sending messages via your web portal	17



# Welcome to your new Web Portal!

The health portal is an online tool that allows you to access your health information and securely communicate with your care team.

This guide will give you step-by-step instructions for how to get set up with your health portal account, how to join a Televisit, and how to contact your care team.

If you get stuck at any point of the setup process, please don't hesitate to call our patient phone line.



**The help number is 561-823-3821.**





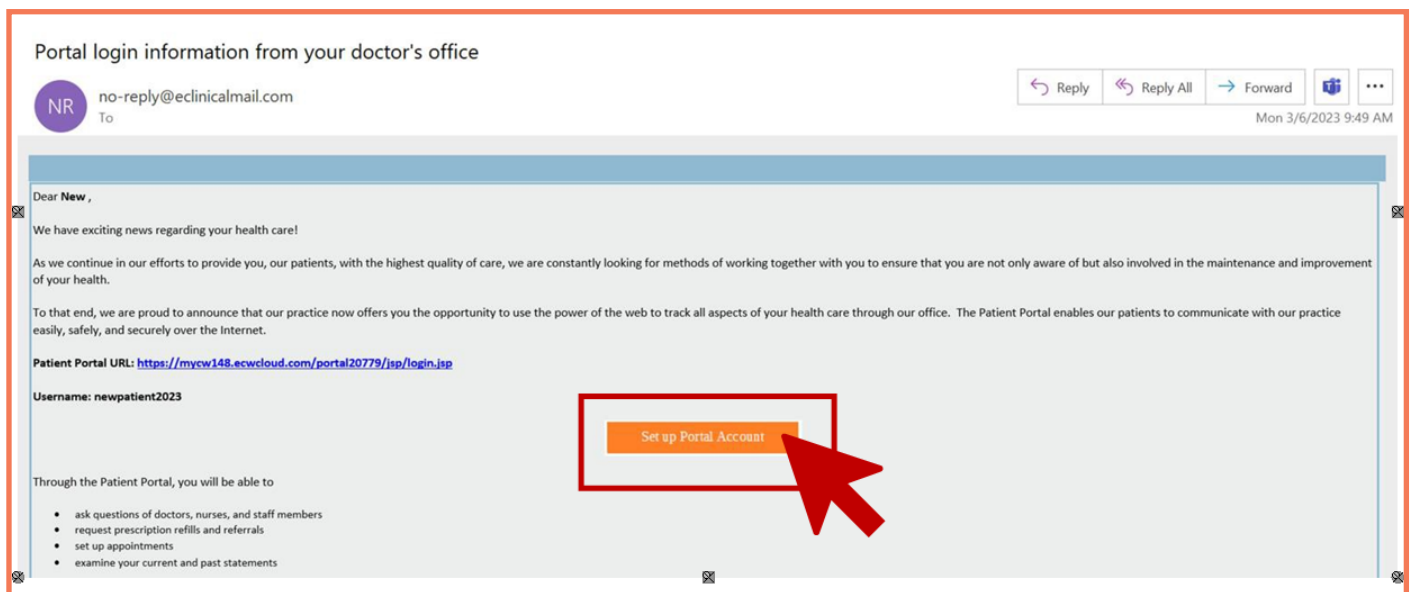
# Introduction: Getting Started

## Setting up your Web Portal Account

Gaining access to your health portal is simple. After your onboarding appointment has been scheduled, you will receive an automated email with instructions on how to set up your patient login. This email will contain a link to setting up your health portal account.

Here are the steps:

1. Check your email inbox that you provided at the time of scheduling your onboarding appointment. [Your health portal welcome email should come from : **no-reply@eclinicalmail.com**]
2. Within the patient health portal welcome email, you will be provided the direct URL to your web portal and your user ID (the user ID is typically the email address on file).
3. Scroll towards the bottom of the email and click **Set up Portal Account**.





# Introduction: Getting Started Web Portal Access

4. The first time you log in, you will need to request a code via **phone** or **text** message.
5. After picking your method of verification, you will receive a unique code to verify your web portal account.
6. You will then need to review our consent forms before proceeding.
7. After clicking **agree**, you will be taken to your portal dashboard.

Conviva Primary Care Anywhere

Login

**Authentication, Reset Password and Consent**

Help us to serve you better! Please submit few details about you.

**2 Verification Code**

Please enter the validation code you received.

Enter code [Resend Code](#)

Code is valid for 5 minutes or 6 attempts

Cancel **Verify**

8. After you are verified, you will be prompted to create your secure password for your portal.

Conviva Primary Care Anywhere

Login

**Authentication, Reset Password and Consent**

Help us to serve you better! Please submit few details about you.

**3 Reset Password**

Please Select your new Password. Refer [Password Guidelines](#) to create secure passwords.

New Password

Confirm New Password

Cancel **Next**





# Introduction: Getting Started Consent Forms

9. Next you will need to review both consent forms.
  - a. First review the eClinicalWorks consent form, afterwards click the check box by **“I have read the consent form and the above information”** to acknowledge acceptance.
  - b. Then click **Agree & Next**.

4

Consent Form

Please acknowledge reading and accepting conditions in consent form.

eClinicalworks...

Practice Consent Form

Stop providing online communication or change its service at any time without prior notification to your physician.

**Risks of Using Online Communication** All medical communication carries some level of risk. While the likelihood of risks associated with the use of online communication, particularly in a secure environment, is substantially reduced, the risks are nonetheless real and very important to understand. It is very important that you consider these risks each time you plan to communicate with your physician, and communicate in such a fashion as to mitigate the potential for any of these risks. These risks include, but are not limited to: Online communication may travel much further than you planned. It is easier for online communication to be forwarded, intercepted, or even changed without your knowledge. Online communication is easier to falsify than handwritten or signed hard copies. A dishonest person could attempt to impersonate you to try to get your medical records. It is harder to get rid of an online communication. Backup copies may exist on a computer or in cyberspace, even after you have deleted your copies. Online communication is not private simply because it relates to your own medical information. Employers and online services have a right to inspect and keep online communication transmitted through their systems. Online communication is also admissible as evidence in court. Online communication may disrupt or damage your computer if a computer virus is attached. Patient Acknowledgement and Agreement I acknowledge that I have read and fully understand this consent form. I understand the risks associated with online communication between my physician and me, and consent to the conditions outlined herein. In addition, I agree to follow the instructions set forth herein, as well as any other instructions that my physician may impose to communicate with patients via online communication. I have had a chance to ask any questions that I had and to receive answers. I have been proactive about asking questions related to this consent agreement. All of my questions have been answered and I understand and concur with the information provided in the answers.

☒ I have read the consent form and the above information.

Decline

Agree & Next



# Introduction: Getting Started

## Practice Consent Form

- Review the Practice consent form, afterwards click the check box by **“I have read the consent form and the above information”** to acknowledge acceptance.
- Then click **Agree**.

**4** Consent Form

Please acknowledge reading and accepting conditions in consent form.

eClinicalworks... **Practice Consent Form**

you can make sure these two factors are present. We need you to make sure we have your correct email address and are informed if it ever changes. You also need to keep track of who has access to your email account so that only you, or someone you authorize, can see the messages you receive from us. If you pick up secure messages from a web site, you need to keep unauthorized individuals from learning your password. If you think someone has learned your password, you should promptly go to the web site and change it. Patient Acknowledgement and Agreement CONSENT FOR MEDICAL TREATMENT: I agree to allow this provider to conduct procedures to diagnose a medical concern, provide medical care, and provide treatment and/or emergency treatment ordered by my provider which are necessary. I realize that the provider(s) attending to me directs my care and is responsible for telling me about the type of care and treatment I will receive. No promises have been made to me as to the results of examinations or treatments provided to me. I understand that students and clinical assistants in the medical field under appropriate supervision may watch or help with my care; however, I have the right to refuse such treatment at any time. CONSENT TO TELEPHONE CALLS (including Cell Phone), EMAILS, TEXTS I understand that by providing a telephone number or email address, I am giving the provider organization and affiliates permission to contact me (including texts, autodialed calls and pre-recorded messages). I acknowledge that I have read and fully understand this consent form and the Policies and Procedures Regarding the Patient Portal that appears at log in. I understand the risks associated with online communications between my physician and me, and consent to the conditions outlined herein. In addition, I agree to follow the instructions set forth herein and including the policies and procedures as set forth in the log in screen, as well as any other instructions that my physician may impose to communicate with patients via online communications. All of my questions have been answered and I understand and concur with the information provided in the answers.

☒ I have read the consent form and the above information.

Decline **Agree**



**Congratulations! Your portal account is now set up. You can verify that registration was successful once it lands on your portal dashboard as shown below.**



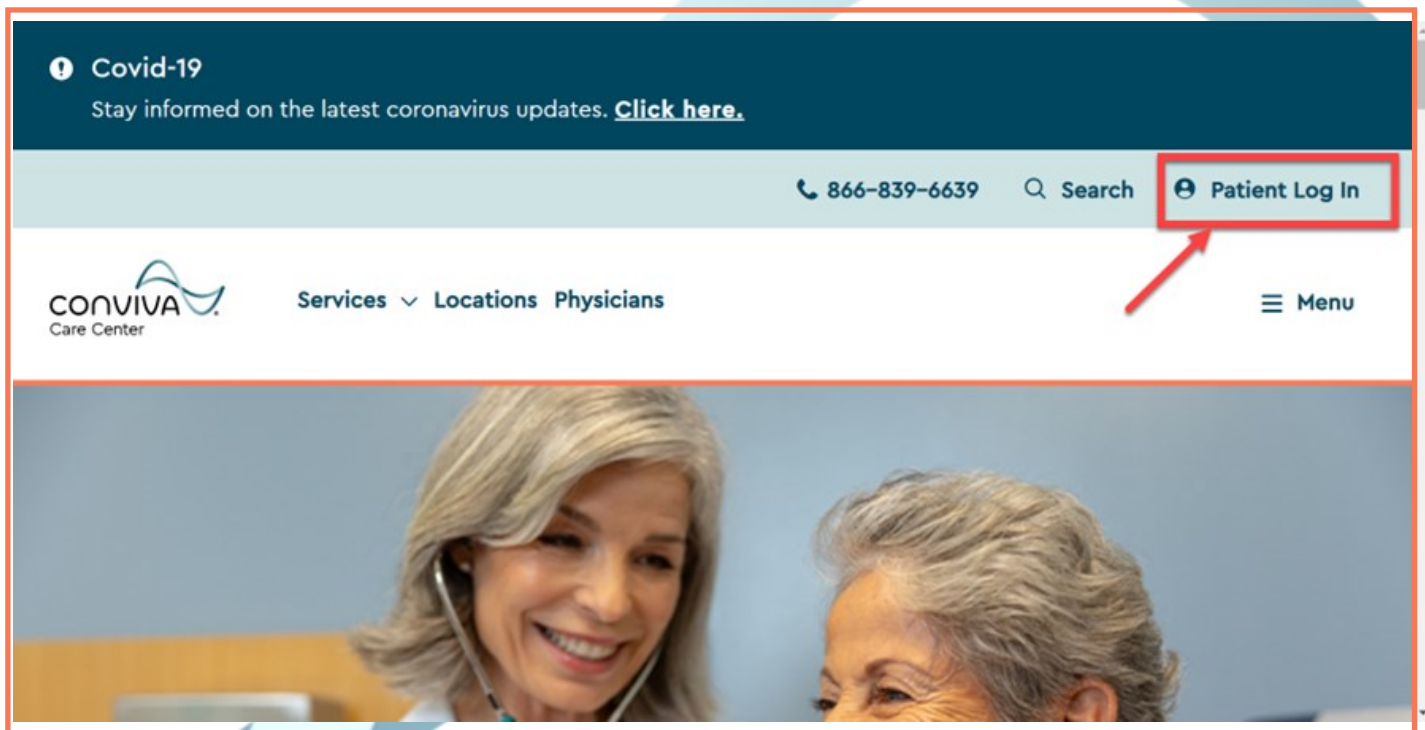


## Account Setup: Subsequent Health Portal Access

For subsequent health portal logins, you can navigate to the portal by clicking the “Patient Log In” button on the top right of any Conviva website.

You will have convenient access to your web portal at anytime via your web browser, through the direct Conviva Patient Portal Link : [Conviva Patient Portal Login Page](#).

Or by visiting [convivacarecenters.com](https://convivacarecenters.com) and clicking **Patient Log In**.






# Account Setup



## View Your Health Record

You will land on the Patient Health Portal Log In page. Click “**View your health record**” to log into your web portal with the credentials used during your portal registration.

You can also login using your **name and birthdate**. A unique access code will be sent to your phone.


If you need to find your username or reset your password, follow the prompts after clicking “**Trouble logging in**”.


HEALTH PORTAL 

Español Healow App available on  

### Welcome to Your Health Portal


Important Note: To improve services, we have made some updates to the Patient Portal. Your current log-in info may not work. If you are unable to log-in, please visit your center to receive your new username and password.


 **View your health record**  
Login to see your reports >

 **Join a Televisit**  
Join a booked consultation >

### Welcome to Your Health Portal


Important Note: To improve services, we have made some updates to the Patient Portal. Your current log-in info may not work. If you are unable to log-in, please visit your center to receive your new username and password.


 **View your health record**  
Login to see your reports →

 **Join a Televisit**  
Join a booked consultation >

#### Login to view your health record

☒ User Credentials ☐ Using Mobile Phone

 User Name

 Password

**Login** [Trouble logging in?](#)



# Joining Your First TeleVisit

## Televisit Combability Check

After you're logged in, you'll see your health portal dashboard.

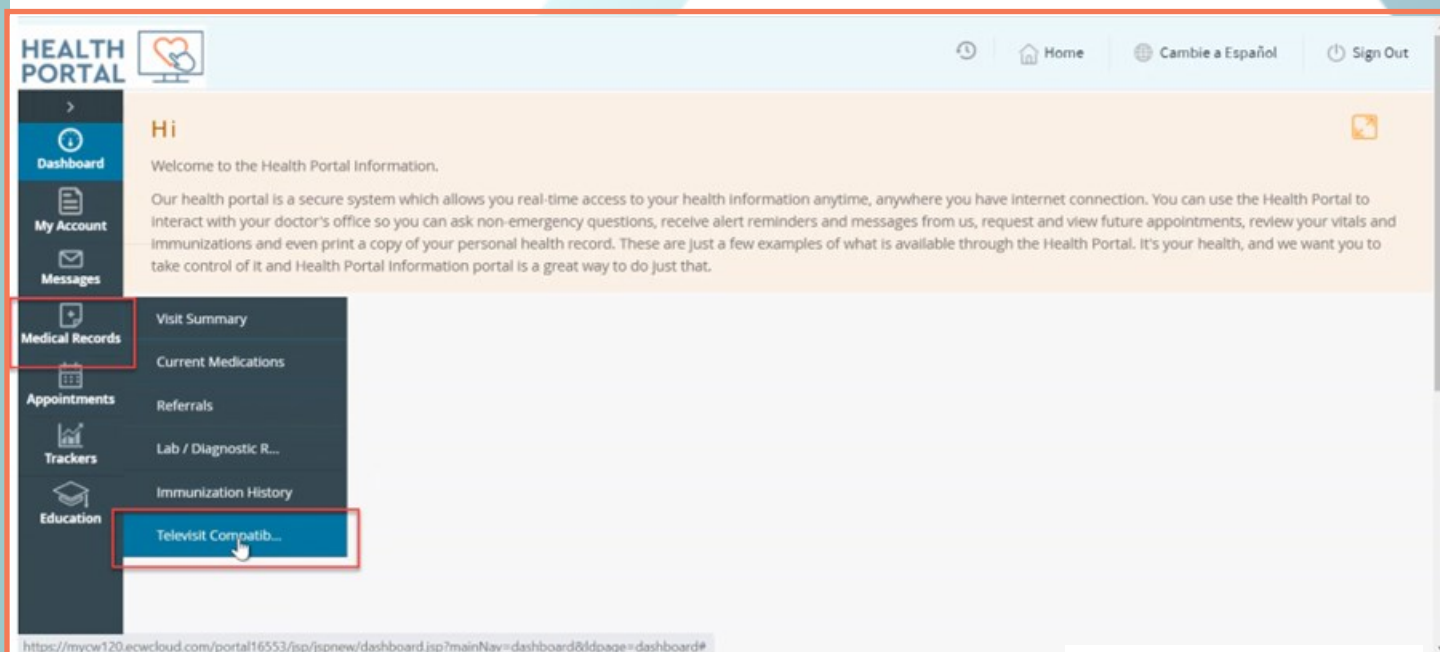
As you begin receiving care from Conviva, this dashboard will display several quick access icons, including upcoming appointments, new messages, recent lab results, and your medication list.

On the left-hand side, you will see the portal navigation panel.

Hovering over each tab will show you which features are available in that section.

To have a successful first TeleVisit it is recommended to review the compatibility information and perform a system compatibility check.

Within your web portal hover the **Medical Records** tab on the right, then click **TeleVisit Compatibility**. You can see this in the image





# Joining Your First TeleVisit

## Televisit Combability Check

Here you will find answers to frequently asked questions for your review in preparation of your first TeleVisit. You can also do a quick system compatibility check by clicking **Run Now**.

### healow TeleVisit Support and FAQ

- > General questions
- > Before the visit
- > Joining your TeleVisit appointment
- > During the video call



You may run a system compatibility check at any time to test your system for TeleVisit appointments.

Run Now



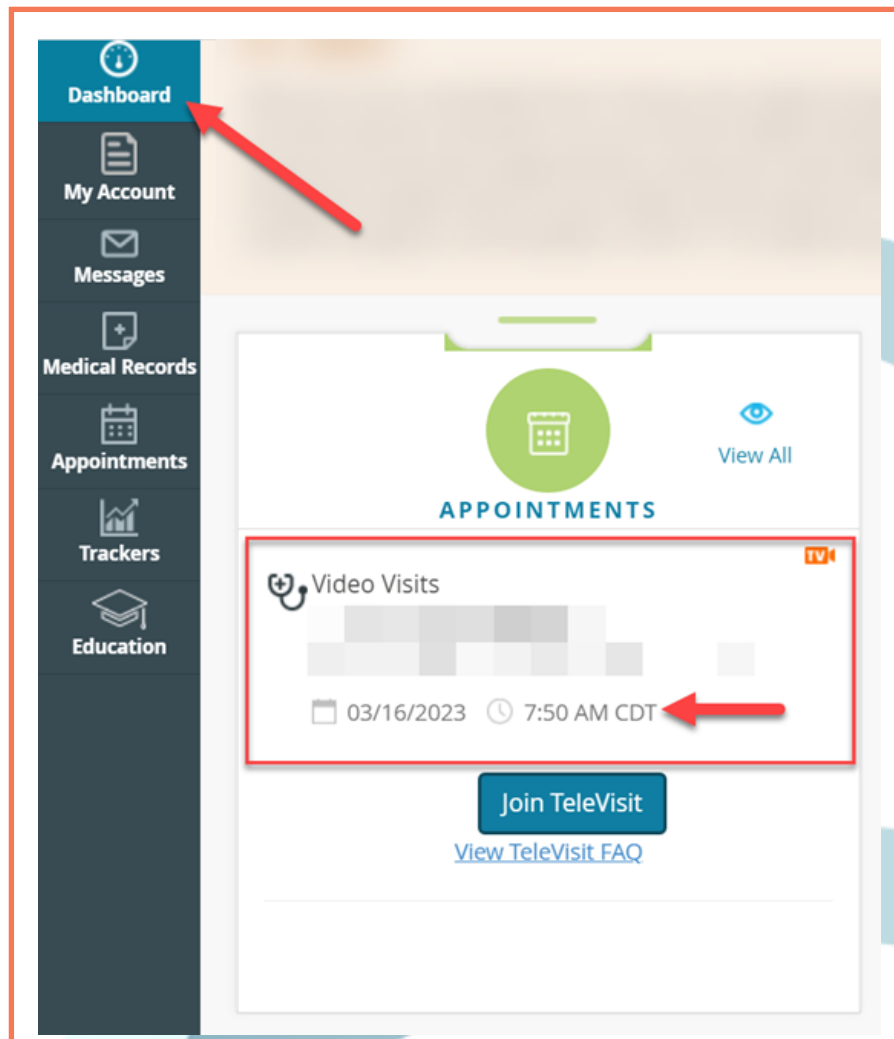
If any additional assistance is needed while completing the system compatibility check, feel free to call our PCA patient phone line at 561-823-3821.



# Viewing Your First TeleVisit

## Looking for Appointments

Your first scheduled visit will be the PCA Onboarding with your Care Partner. By going back to your Dashboard tab, you will be able to see your upcoming scheduled TeleVisit.



If you do not see any upcoming appointments located on your Dashboard, please call our PCA phone line for assistance at 561-823-3821.

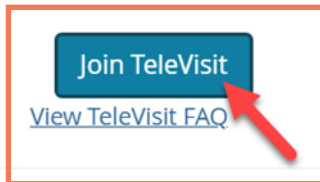




# Practice Joining a Televisit Session Practice

Feel free to practice joining your upcoming TeleVisit while in your patient web portal prior to your scheduled visit!

1. Click **Join TeleVisit** on your Appointment on your Dashboard



2. Next you will see optional vitals that can be added, and you can skip this screen by clicking **Next**.

healow TV  
Health and Online Wellness

« Dashboard | Video Visits | 16 Mar 2023 | 7:50 AM | Help? | Logout

Entering Vitals below is optional.

Height  
[ ] ft [ ] inches

Weight  
[ ] pounds

Blood Pressure  
[ ] / [ ]

Temperature  
[ ] F

Respiratory Rate  
[ ] breathe per minute

Next

3. You continue to skip through the compatibility check and click **Proceed** to move past the Consent form.
4. You will then get to the page where you will be able to click **Start TeleVisit** which will put you in a virtual waiting room until your care team is ready to join the appointment.

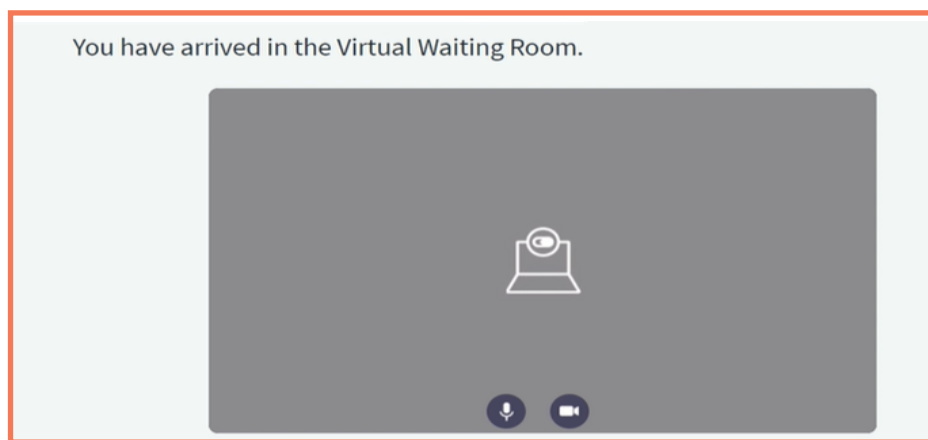




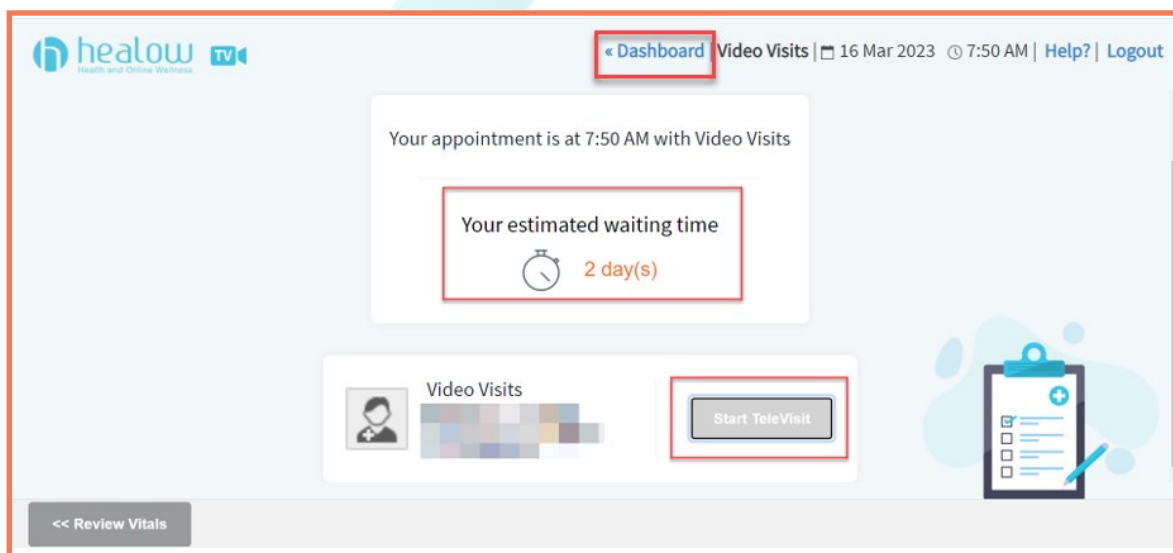
# Practice Joining a Televisit Virtual Waiting Room

When you have arrived in the Virtual Waiting Room, the screen on your mobile device or laptop will look like the image shown below.

5. If you are practicing joining your TeleVisit too far in advance, it will show your estimated time until your appointment and the **Start TeleVisit button will be greyed out.**



6. Your estimated waiting time until your Televisit will be displayed.



7. You can exit this screen within your web portal by clicking **Dashboard** at the top.

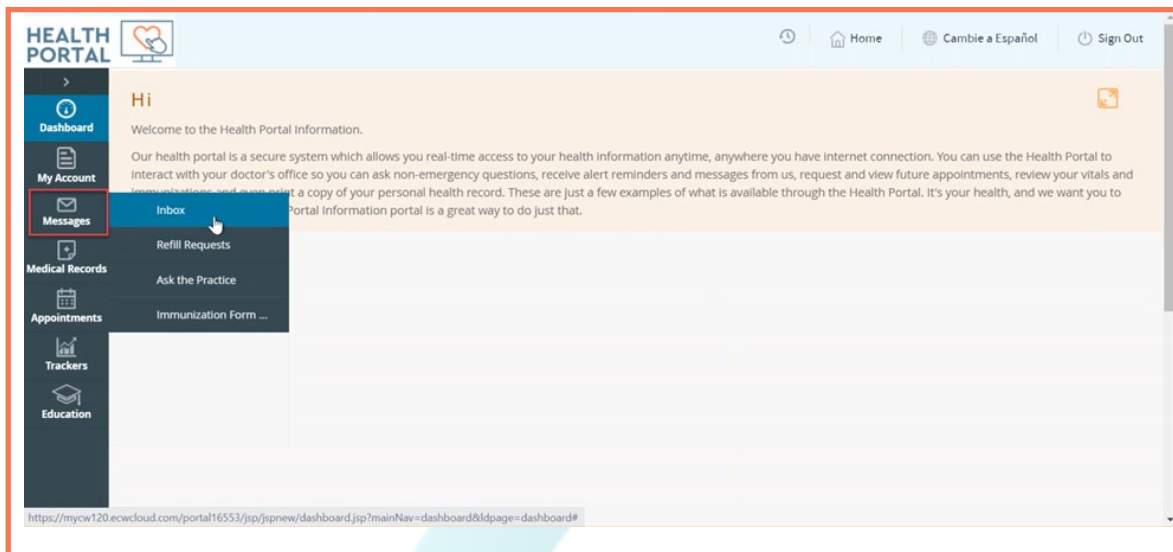


# Contacting Your Care Team

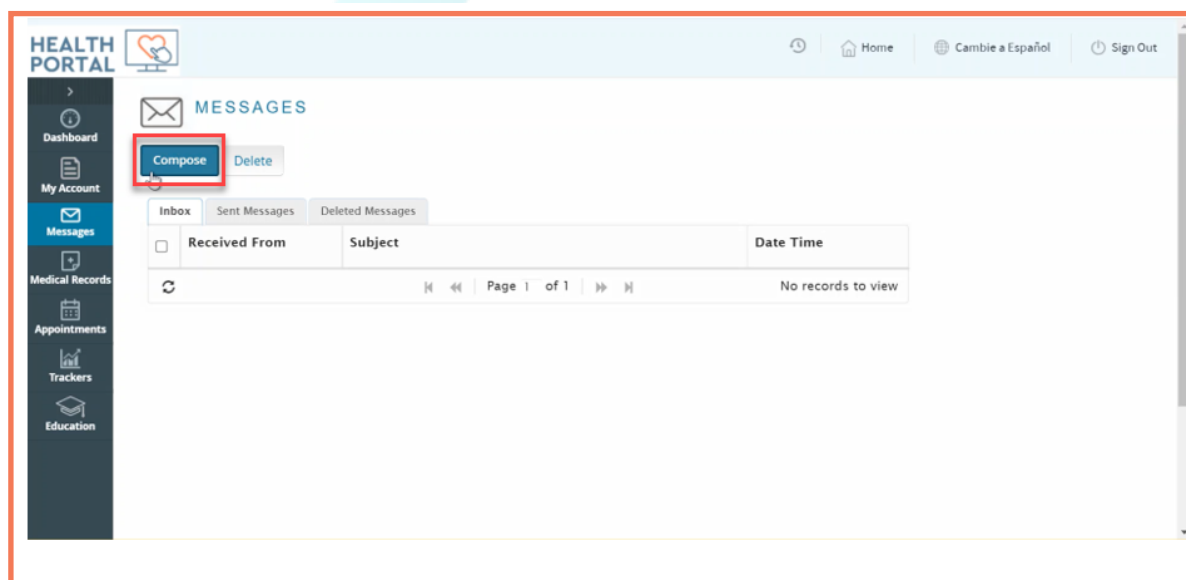
## Convenience through the Web Portal

You can easily send messages through the 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**.





# Messaging Your Care Team

## Ease through the Web Portal

You can test send messages through the Web Portal.

3. Test out sending a message to your Care Team for practice by filling out all the appropriate fields. Then click **Submit**.

Subject: \*

I'm a new patient for Primary Care Anywhere

Message: \*

Hello, Looking forward to meeting my Care Partner during my first Onboarding Visit!

Submit Cancel

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

MESSAGES

Compose Delete

Inbox **Sent Messages** Deleted Messages

	Sent To	Subject	Status	Date Time
<input type="checkbox"/>				

Page 1 of 1 No records to view



You now have all the necessary tools to have a successful first TeleVisit with your Care Partner!

For more information on how to navigate your patient web portal, please refer to the additional help guides located on the patient onboarding website.