

ChARM Patient Portal User Guide

ChARM Patient Portal helps you to securely access the medical records shared by your practice and allows better collaboration with your care provider.

Go through this User Guide for detailed instructions on using ChARM PHR.

- Patient Portal Registration
- > <u>Patient Portal Login</u>
- Appointment Request
- Fill Pre-Appointment Questionnaires
- Access Visit Summary
- ➢ Access Lab Results
- Access Documents
- Share Documents with Practice
- Send Message to Providers
- ➢ <u>Medication Refill</u>
- Adding Family Members to Your PHR Account
- Password Reset
- Patient Demographics
- Personal Health Portal



Patient Portal Registration

You can register a patient portal account by accepting the invitation email sent by your practice.



Note:

If you have not received the invitation email,

- **1.** *Please check SPAM folder.*
- **2.** Contact your practice and check if your Practice has enabled PHR account for you or not.
- **3.** In case you have missed the email, please ask your Practice to resend the invitation, after cross verifying your email address.

Once you have the invitation email, follow the steps below to register your account.





Step 1:

- > Click on the invitation link.
- > Enter patient's date of birth.

DOB verification is done to confirm that you are authorized to access this patient's medical records.

ABX Community Hospital				
Patient Portal Account Activation				
1 DOB Verification				
	Enter patient's date of birth.			
Name	JOHNATHAN SWIFT			
Date Of Birth *	mm/dd/yyyy 12 (mm/dd/yyyy)			
	Next Cancel			

Note:

Make sure that you enter DOB in the format mentioned in the form. For example, if your DOB is June 20, 1990, enter '06/20/1990' (for mm/dd/yyyy format)

If you get date of birth mismatch error, there is a possibility that an incorrect Date Of Birth is entered by your practice. Contact your practice for correcting it.





Step 2:

Next, choose your preferred username (login Id) and password.

Username and Password are case sensitive. Hence make sure that you enter them in proper case.

Enter the text that you see in the image and click on 'Submit'.

ABX Community Hospital					
Patient Portal Account Ac	ctivation				
2 Account Creation					
Username *	Please enter the Login Id				
Password *					
Confirm Password *					
	Enter the text you see in the below image				
	uchx <i>s</i> gx				
	Submit Cancel				

Note:

If username that you have entered is already in use, you will be asked to enter a different name.

Please remember the username and password. Incase, if you forgot the password, use the 'Forgot Password' link on <u>https://charmphr.com/</u> to reset your password.



Patient Portal Login

Once the account registration completes, you will be automatically redirected to patient portal and also will get a Welcome Email.



Welcome email has a link to patient portal login page of your practice. You can bookmark this link for future reference.

	Welcome to ABX Co	ommur	nity Hospital	Login
				Username
	Clinical		Appointments	password
	Access your clinical visits and medical records shared by your provider		Request and manage your appointments online.	
	anywhere, anytime.			Login Forgot Password?
•	Documents	2	Questionnaire	
	Share your documents with your provider and manage all your documents in one	•	Fill pre-appointment questionnaire online. MInimize your check-in time and let your	
I	place.		provider know about you in advance.	
(T	Lab Results		Messages	
	Access and download your lab results		Collaborate with your Care Provider using	



In addition, you can also login to patient portal from ChARM PHR home page at <u>https://charmphr.com</u>





Appointment Request

To schedule an appointment with your provider,

- Login to Patient Portal
- ➢ Go to the 'Appointments' section
- Click on 'Request Appointment' button

ABX Community	Hospital		L 💽	OHNATHAN SWIFT 🌸 🔒 🗗
				ABX Community Hospital
16 (?	\sim		11 Eldoms Road East Well Street CO Zip Code - 67890
Appointments	Questionnaires	Messages	Documents	Providers
Appointments	Questionnaires	Messages	Documents	Dr. Steven " D'Antonio Dr. William Aberthnet
		R _x		
Clinical	Lab Pecults			
Cinica	Lab Results			
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# Home	_	
Appoint	ments	Request Appointment
	No upcoming/requested appointments with your practice	

The appointment request page lists all the providers in your practice.

Choose the provider with whom you want an appointment.



Option 1:

If your provider has enabled online appointment booking, you can view the available slots.

Appointment Request						
Choose Facility ABX	Community Hospital	Choose Provider	Dr. William Aberthnet	Patient Name	JOHNATHAN SWIFT	
Go To	Go To 🛗 Aug 11 — Aug 17 2013					
Sun 8/11	Mon 8/12	Tue 8/13	Wed 8/14	Thu 8/15	Fri 8/16	Sat 8/17
		3.20 pm	9.00 am			9.00 am
		3.30 pm	9.10 am			9.10 am
		3.40 pm	9.20 am			9.20 am
		3.50 pm	9.30 am			9.30 am
		4.00 pm	9.40 am			9.40 am
		4.10 pm	9.50 am			9.50 am
		4.20 pm	10.00 am			10.00 am
		4.30 pm	10.10 am			10.10 am
		4.40 pm	10.20 am			10.20 am
		4.50 pm	10.30 am			10.30 am
		5.00 pm	10.40 am			10.40 am
		5.10 pm	10.50 am			10.50 am
		5.20 pm	11.00 am			11.00 am
		5.30 pm	11.10 am			11.10 am
		5.40 pm	11.20 am			11.20 am
		5.50 pm	11.30 am			11.30 am

- > Choose a convenient time by clicking on the slot
- > Enter Reason for Appointment
- Click on 'Schedule

Appointment Request					
Facility	ABX Community Hospital				
Provider	Dr. William Aberthnet				
Patient	JOHNATHAN SWIFT				
Date & Time	Aug 13, 2013 3.30 pm				
Reason for Appointment *					
	Schedule Cancel				



Option 2:

If your provider has not enabled online appointment booking, available slots view will not be shown. Instead Appointment Request Form will be shown.

- Enter your date/time preference
- Reason for appointment
- Click on 'Request'

Appointment Request					
Choose Facility ABX Con	nmunity Hospital Choose Provider Dr. Steven " D'Antonio Patient Name JOHNATHAN SWIFT				
Date Preference	Date Range				
Time Preference	Time Period \$ From 07 \$ 00 \$ PM \$				
Appointment Type	In Person Phone Call				
Reason for Appointment *					
	Request				

On submitting the form, Appointment request mail will be sent to your Provider. The appointment requests are also listed in patient portal under Requested Appointments section.

# Home				
Appointments				Request Appointment
Requested				
Physician Name	Date	Time	Reason	
Dr Steven Anderson	Aug 25, 2013 to Aug 31, 2013	Any Time	Diabetic Follwup	Delete



Once your provider confirms the appointment, you will get a confirmation email.

The confirmed appointments are listed under Upcoming Appointments section of patient portal.

# Home					
Appointments	5				Request Appointment
Upcoming Appoint	ments				
Physician Name	Date	Time	Message from physician	Reason	
Dr Steven Anderson	Aug 25, 2013	09:00 AM	Please be there in office 15mins prior to your appointment time.	Diabetic Follwup	



Fill Pre-Appointment Questionnaires

From ChARM Patient Portal, you can fill pre-appointment questionnaires shared by your practice prior to your office visit.

This significantly reduces the time you spent in waiting room during appointment and helps your provider to know about you in advance.

ABX Community	Hospital		L 💽	OHNATHAN SWIFT 🎄 🔒 🗗
	2			ABX Community Hospital
	?			11 Eldoms Road East Well Street CO Zip Code - 67890
Appointments	Questionnaires	Messages	Documents	Providers
				Dr. William Aberthnet
	<u>₹</u>	R		
Clinical	Lab Results	Rx		

You will get an email notification whenever your practice shares some questionnaires with you.

In addition, a notification icon (with count) is shown on top right corner of Questionnaires section if you have any questionnaires to fill.

To fill pre-appointment questionnaires

- Login to Patient Portal
- ➢ Go to the 'Questionnaires' section
- > Choose a questionnaire, fill the details and click on Save

The 'Current' tab lists the questionnaires to be filled for your upcoming appointment. Fill all the questionnaires listed under the 'Current' tab.

The 'Past' tab lists the questionnaires filled during previous consultations.



Questionnaires			
Current Past			
Appointment on Aug 18, 2013 11:00 AM	Family Hostory		Aug 18, 2013
Personal Details Sender : Dr. Steven * D'Antonio Family Hostory Sender : Dr. Steven * D'Antonio			Dr. Steven " D'Antonio ABX Community Hospital 11 Eldoms Road , East Well Street CO Alabama
	Any body is having Diabetic O Yes problem in your family	O No O Others	
	Any body is having Heart O Yes related problem in your family	O No O Others	
	Smoking Habits O Never	Smoked O Frequent O Ra	rely
	Save]	

Note:

Make sure to click on the Save button once you fill a questionnaire. Otherwise, your inputs will not be recorded. Follow this for every questionnaire that you fill.

Questions marked with red asterisks are mandatory to fill.

You can partially fill a questionnaire, save and continue it latter.

You can edit the questionnaire till you go for consultation. Once the consultation starts, you cannot edit it.



Access Visit Summary

After your consultation, you can access the visit summary shared by your provider under 'Clinical' section.

A notification icon is shown on top right corner of Clinical section, whenever you get a visit summary. You will also receive an email notifying this.

ABX Community	Hospital		J.	OHNATHAN SWIFT 🔹 🔒 🕞
	1	_	3	ABX Community Hospital
	?			11 Eldoms Road East Well Street CO Zip Code - 67890
Annointmonto	Questionnaires	Marsagar	Documents	Providers
Appointments	Questionnaires	Messages	Documents	Dr. Steven " D'Antonio Dr. William Aberthnet
الم	<u>₹</u>	R _x		
Clinical	Lab Results	R×		

The visit summary has details about the Medications, Supplements and other recommendations given by your provider.

'isit Summar	У				🛃 Download Clo	se
Provider : Dr. Steven D'Antonio	" Practice	: ABX Community Hospital				
Patient : JOHNATHA	AN SWIFT Date	Tue, Aug 13, 2013				
Medications						
Medications	Instructions	Dispense	Refill	Pharmacy Instruction	Intake Status	
Prednisone oral tablet	1 tablet(s) QD for 10 days	10	1	Manufactured,Substitute Generic	START	
Lamicta oral powder	1 tsp QD for 5 days	5		Manufactured,Substitute Generic	START	
levothyroxine 150 mcg oral tablet	1 tablet(s) QD for 201 days	201	2	Manufactured,Substitute Generic	START	
Supplements						
Supplements	Manufacturer	Intake Details	Weaning Schedule	Comments	Intake Status	
B-Complex 10 mg		1.0 tablet(s) Once a day After Meals for 10 day(s)			START	
Diets						



You can also access the pdf version of visit summary under Documents > 'Visit Summary' section.

ABX Community Hospital			* @ G
# Home			
Documents			
Used : 0.0 MB 100 MB			Upload
≗+ Shared to me 2	ndf Aug 12 2012		Astion
Handouts 0.0 MB	pur Aug 15, 2015	* *	Action
Visit Summary			
.≗+ Shared by me			



Access Lab Results

You can access the lab results shared by your practice under Lab Results section.

A notification icon is shown on top right corner of Lab Results section, whenever you get a lab result.

You will also receive an email notifying this.

ABX Community	Hospital		JC	DHNATHAN SWIFT 🔅 🔒 🗗
		_		ABX Community Hospital
	?			11 Eldoms Road Washington, Alabama 87900
Appointments	Ouestionnaires	Messages	Documents	Providers
				Dr. Steven DAntonio
<u>Ľ</u> st		R		
Clinical	Lab Results	Rx		

To access the shared lab results, go to Lab Results section and click on View button.

ABX Comm	unity Hospital			JOHNATHAN SWIFT	* 8 6
# Home					
Lab Resu	lts				
Date	Test Name	Result	Lab Name	Physician Name	
Aug 14, 2013	Lipid Profile	Abnormal	General	Steven DAntonio	View
Aug 07, 2013	Complete Blood Count	Abnormal	General	Steven DAntonio	View



You can also download the result as PDF.

	llai			IOL 🙎	HNATHAN SWIF	T 🎄	•
ipid Profile					👤 Downl	pad	Close
Test Name : Lipid Profile	Lab I	Name :	General	Date	: Aug 14, 2013		
Physician Name : Steven DAntonio	Resu	lt :	Abnormal	Comments	Schedule for a one month	a followup	after
Name	Result	Unit	Reference Min	Reference M	Max Inte	erpretatio	n
Total Cholesterol	190	mmHg		200.0			
Triglycerides	170	mmHg		150.0		High	
LDL Cholesterol	90	mmHg		100.0			
HDL Cholesterol	70	mmHg	60.0				



Access Documents

You can access the handouts, consent forms and other documents shared by your practice under Documents section.

A notification icon is shown on top right corner of Documents section, whenever you get new documents from your practice.

16 C	Questionnaires	Messages	Documents	ABX Community Hospital 11 Eldoms Road Washington, AL 87900 Providers Dr. Steven DAntonio
Clinical	Lab Results	Rx		

You will also receive an email notifying this.

To access the shared documents,

- ➢ Go to Documents section and select 'Shared to me' folder.
- Click on the file to preview it.

			Share File
	Aug 14, 2013	≜ +	Action -
мв	Aug 14, 2013	≜ +	Action 👻

You can also download the files by using 'Action' > 'Download' menu.



Share Documents with Practice

You can share your documents with practice from Documents section.

To share a document, click on the 'Share File' button, which brings a file chooser dialog.

# Home		
Documents		
Used : 0.0 MB 100 MB		Share File
. ♣ + Shared to me 2		
Visit Summary		
Handouts		
♣→ Shared by me	No documents shared	

Choose the required file from your computer.

Name	Date Modified	Size	Kind	
Appointment_Confirmed_Status.png	Today 12:02 PM	39 KB	Portabimage	
Apponintment_Request_Status	Today 11:59 AM	34 KB	Portabimage	
ChARM_PHR_User_Guide	Today 10:29 AM	3.3 MB	Officeument	
🔁 Consent_Filled	Today 10:24 AM	3.4 MB	Adobeument	
Upcoming_App	Today 10:16 AM	42 KB	Portabimage	
Questionnaie_list	Today 10:16 AM	86 KB	Portabimage	
Messages	Today 10:15 AM	75 KB	Portabimage	
Choose_Slot	Today 10:15 AM	96 KB	Portabimage	
UserName_Password	Today 10:15 AM	72 KB	Portabimage	
App_Req_General	Today 10:15 AM	58 KB	Portabimage	
Invitation_Email	Today 10:15 AM	46 KB	Portabimage	
Questionnaires	Today 10:14 AM	110 KB	Portabimage	
Notification_Message	Today 10:14 AM	22 KB	Portabimage	
Forgot Password.png	20-Aug-2013 6:10 PM	176 KB	Portabimage	
				Cancel





Select the practice member(s) to be notified about file sharing.

File Shared Successfully	×	
Send notification message to :		
Dr Steven " D'Antonio	Dr. Andrew Johnson	
Send	Close	

Once confirmed, the selected members will get a notification message with link to access the shared files.

All the documents shared by you are listed under Documents > 'Shared by me' section.

Documents			
Used : 3.25 MB	100 MB		Share File
≗← Shared to me 2			
Visit Summary	Consent_Filled.pdf 3.25 MB	Aug 22, 2013	 Action 👻
Handouts			
L→ Shared by me			



Send Message to Providers

Patient portal enables you to securely communicate with your provider.

When your provider sends a message, you will get a notification to your personal email and also unread messages count is shown on top right corner of Messages section.



Click on the message to view the details. Use the Compose option to send message to your provider.

Messages			
		Start Date 12 End Date	Subject Q
Compose	Delete		Show 1 - 1 of 1
Inbox	From	Subject	Date
Sent	Dr. Steven DAntonio	Re: Regarding Followup	Aug 14, 2013
	Reply Reply All Forward		×
	From Dr. Steven DAntonio		
	Sorry, I am on vacation next week.		
	We can schedule for end of this month.		
	Regards Steven		
	On Wed, 14 Aug 2013 06:10:42 PM +0530) <johnathan swift=""> wrote</johnathan>	
	Dear Dr. Steven,		
	I would like to come for a followup visit n	ext week.	



Medication Refill

The Rx section in patient portal dashboard lists all the active medications prescribed by your provider.

Questionnaires	Messages	Documents	 11 Eldoms Road Washington, Alabama 87900 Providers Dr. Steven DAntonio
Questionnaires	Messages	Documents	Providers Dr. Steven DAntonio
	R		
Lab Results	Rx		
	Lab Results	Lab Results Rx	Lab Results Rx

To send refill request for a medication

- ➢ Go to Rx section
- Choose the required Medication
- Click on 'Refill Request'

# Home				
Rx				
Current Medications				
Medication	Directions	Prescribed On	Prescribed By	
Ablify 1000 milligram(s) oral tablet	1.0 tablet(s) 3 times a day for 10 days, oral route	Aug 13, 2013	Dr.Steven DAntonio	Refill Request
Nitrocondin 40 milligram(s) oral tablet	1.0 tablet(s) 3 times a day for 10 days, oral route	Aug 14, 2013	Dr.Steven DAntonio	Refill Request
Current Supplements				
Current Supplements	Directions	Prescribed On	Prescribed By	
Vitamin-D 100	1.0 tablet(s),4 times a day,Away From Meals	Aug 14, 2013	Dr.Steven DAntonio	Refill Request



Check the medication details and confirm the request.

Refill Request		×
Supplement	Ablify 1000 milligram(s) oral tablet	
Directions	1.0 tablet(s) 3 times a day for 10 days, oral route	
Prescribed On	Aug 13, 2013	
Physician Name	Dr.Steven DAntonio	
	Confirm	

Once confirmed, a refill request message will be sent to your provider for further processing.

A copy of the message is available under Messages > Sent folder, for your reference.



Adding Family Members to Your PHR Account

ChARM PHR allows you to access the records of your family members within your PHR account.

A PHR account is uniquely identified by an email address. Hence to have a single account for all your family members,

- Inform your practice to update your email address for all your family members.
- > and send PHR invitation for each of them individually.

You can register your family members by accepting the invitation email sent by your practice.



Note:

If you have not received the invitation email,

- **1.** Please check SPAM folder.
- **2.** Contact your practice and check if your Practice has enabled PHR account for your family member or not.
- **3.** In case you have missed the email, please ask your Practice to resend the invitation, after cross verifying the email address.



Once you have the invitation email, follow the steps below to register your account.

Step 1:

Click on the invitation link and enter patient's Date Of Birth.

ABX Community Hospital						
Patient Portal Account Activation						
1 DOB Verification						
	Enter patient's date of birth.					
Name	David Cross					
Date Of Birth *	10/02/2008 112 (mm/dd/yyyy)					
	Next Cancel					

Note:

Make sure that you enter DOB in the format mentioned in the form. For example, if your DOB is June 20, 1990, enter '06/20/1990' (in mm/dd/yyyy format)

If you get date of birth mismatch error, there is a possibility that an incorrect Date Of Birth is entered by your practice. Contact your practice for correcting it.

Step 2:

Enter Username and Password of your existing Patient Portal account.

ABX Community Hospital

Enter the User	Name and Password of your existing account
Username *	
Password *	
	Submit Cancel



Once the username and password is verified, your family member's profile will be added to your PHR account and you will be automatically redirected to patient portal dashboard.

Use the switch profile option on top right corner to change patient profiles.



Now you can access all the records of your family member and do other actions as you do on your account.



Password Reset

If you forgot your patient portal account password, you can reset it either from ChARM PHR home page or from your practice specific login page.

	[Collaborate with your Care Provider	Login
	ī 2	Manage your Medications effectively	Username
	<u>⊀</u>	Track your Health through Wellness Trackers	Password
	┣────┣	Manage all your family members Health at a single place	Login Forgot Password?
		Access your Records any time any where	
		Manage your Personal and Medical Events using Calendar	

To reset your account password

- ➢ Go to <u>https://charmphr.com</u>
- Click on 'Forgot Password' link
- Enter UserName or Email Address

Once you submit the details, you will receive an email with a link to reset your account password.

Note:

Check the SPAM folder if have not received password reset email.

Password is case sensitive. Hence make sure that you enter in proper case.

For your reference, account username is mentioned in the password reset email.



Patient Demographics

You can access your demographic details under Settings > My Account section.

JOHNATHA	N SWIFT -	*	•	G
	My Account			
	Change Passwor	d		
	Personal Portal			

The details shown in this section are based on the records in your practice. This is a read only view. If you would like to update any details, please contact your practice.

My Accou	nt				
Emergency Co	ntact Details				
Contact Name	Alex Andrew	Contact Number 952	4345423		
Primary Conta	ct Details				
Caregiver Name		Line 1	99238 VERTIGO LANE		
Preferred Commu	nication	Line 2		JOHN	ATHAN SWIFT
Email Id	jswift@gmail.com	City	MINNEAPOLIS	First Name	JOHNATHAN
Home Phone		Country	United States	Last Name	SWIFT
Mobile	9524475477 (primary)	State	Minnesota	Age	33
Work Phone		Zip	55427	DOB	Oct 24, 1979
Fax				Genter	male
				Blood Group	A+
Additional Info	ormation			Language	English
Race	White	Employment Status	Employed	Marital Status	Married
Ethnicity	Hispanic or Latino	Smoking Status	Never Smoker		



Personal Health Portal

You can maintain your personal health records other than what is shared by your practice under Personal Health Portal.

The Personal Portal is accessible under Settings icon.

OHNATHA	N SWIFT -	*	•	G
_	My Account			
C	Change Password			
	User Guide			
	Personal Portal			

From Personal Health Portal you can

- Enter your daily interventions (like OTC drug intake etc) and generate useful reports
- Track your Health through Wellness Trackers
- > Keep track of your health schedules in personal Calendar
- > Upload personal documents and access them anywhere, anytime
- Maintain contact details of your Providers, Pharmacies and Labs
- ▶ Go through Educational Materials specific to your medical conditions



Records	Wellness	Calendar	Files	Library	Research	
-∿-£ Trackers Obse	木 ② ervations Custom Pro	ograms Academic	Tracking ATEC	QEESI Growth Cha	art	
Tracker	rs					Add Tracker
General						Action 💌
Weight	176.0 lbs	17 Jul 2013	62		176	
ВМІ	26.76	17 Jul 2013	27.56		26.76	
Pulse Rate	2					Action 👻
Pulse Rate	22.0 bpm	27 Sep 2010	1		22	

Records	Wellness	Calendar		Library	Research	
12						
Calendar My Even	nts					
Calendar						Add Event
Smart Add 😮 🛛	xample: Appointmen	t at 4pm	Ado			Show All \$
day week mo	onth		Tuesday, A	Aug 27, 2013	3	today
	ppontenene mer orr ret		12.12.11	Fuesday 8/27		
12pm						
1pm 1:00 - 1:3 Mary J, A	0 ppointment with Physici	an 111, 01:00 PM - 01:30) PM			
2pm						
3pm						