ChARM Patient Portal User Guide

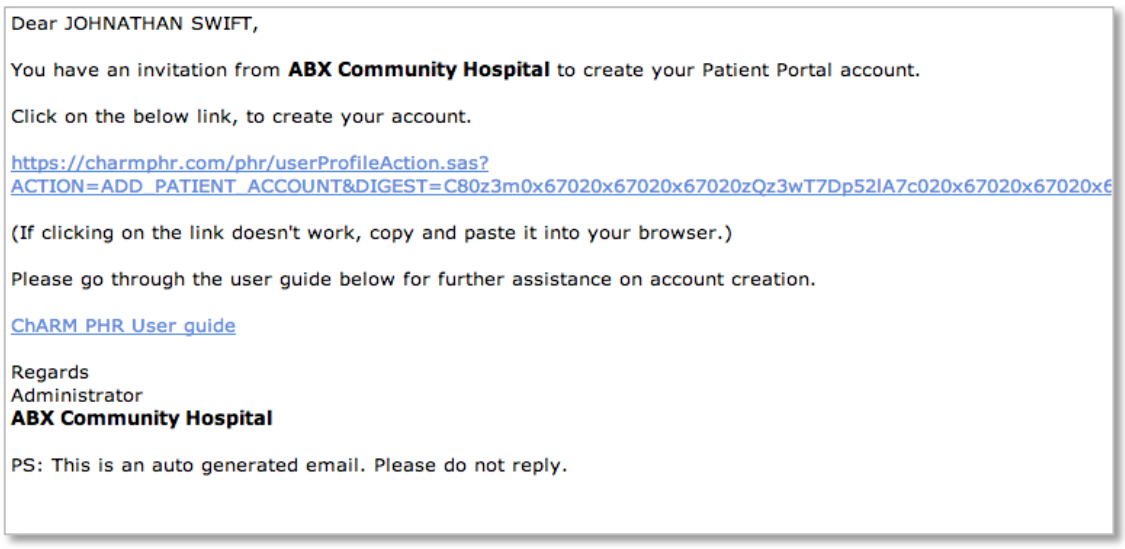
ChARM Patient Portal helps you to securely access the medical records shared by your practice and allows better collaboration with your care provider.

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

- Patient Portal Registration
- Patient Portal Login
- Appointment Request
- Fill Pre-Appointment Questionnaires
- Access Visit Summary
- Access Lab Results
- Access Documents
- Share Documents with Practice
- Send Message to Providers
- Medication Refill
- 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.



Dear JOHNATHAN SWIFT,

You have an invitation from **ABX Community Hospital** to create your Patient Portal account.

Click on the below link, to create your account.

https://charmphr.com/phr/userProfileAction.sas?
ACTION=ADD_PATIENT_ACCOUNT&DIGEST=C80z3m0x67020x67020x67020zQz3wT7Dp52lA7c020x67020x67020x6

(If clicking on the link doesn't work, copy and paste it into your browser.)

Please go through the user guide below for further assistance on account creation.

ChARM PHR User guide

Regards
Administrator
ABX Community Hospital

PS: This is an auto generated email. Please do not reply.

Note:

If you have not received the invitation email,

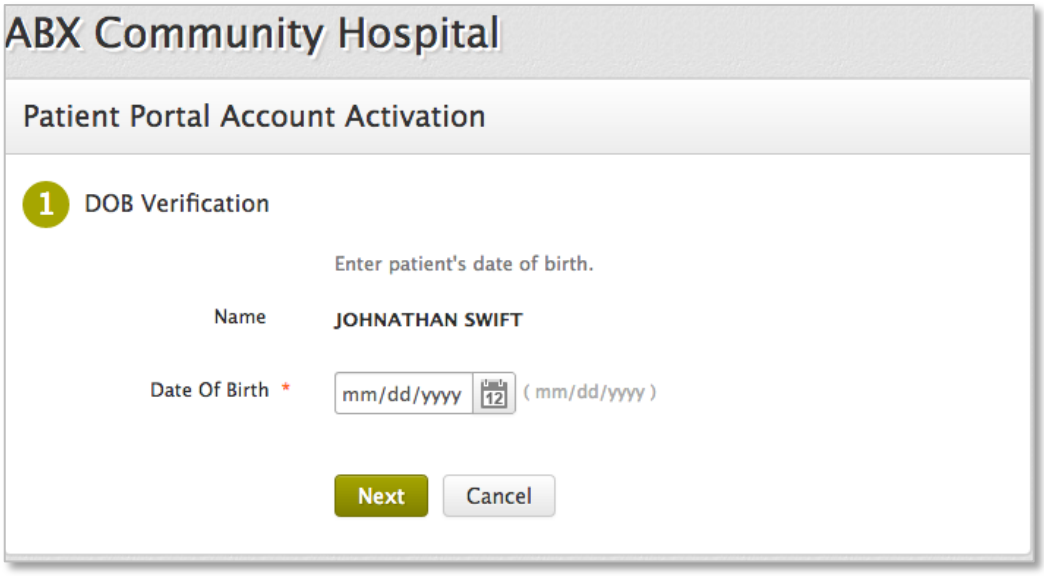
1. *Please check SPAM folder.*
2. *Contact your practice and check if your Practice has enabled PHR account for you or not.*
3. *In case you have missed the email, please ask your Practice to resend the invitation, after cross verifying your email address.*

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.



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)

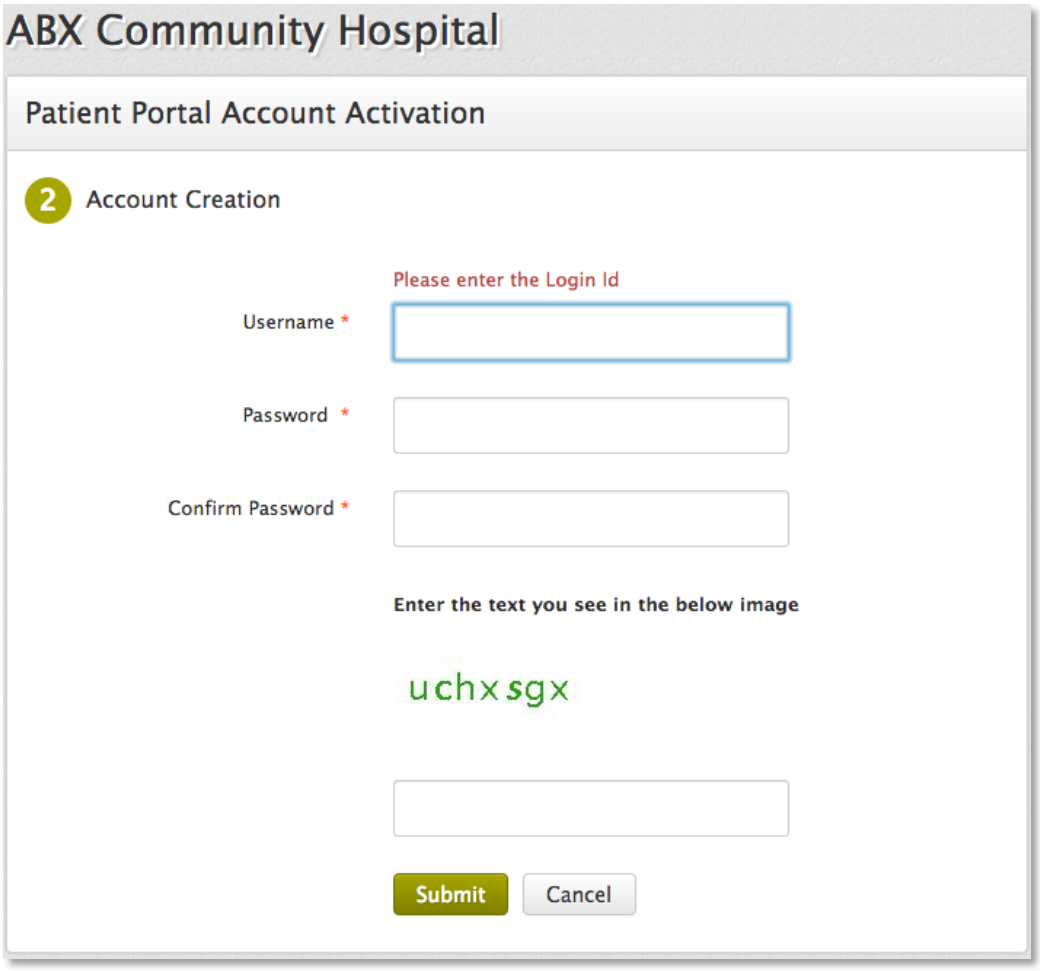
If you get date of birth mismatch error, there is a possibility that an incorrect Date Of Birth is entered by your practice. Contact your practice for correcting it.

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'.



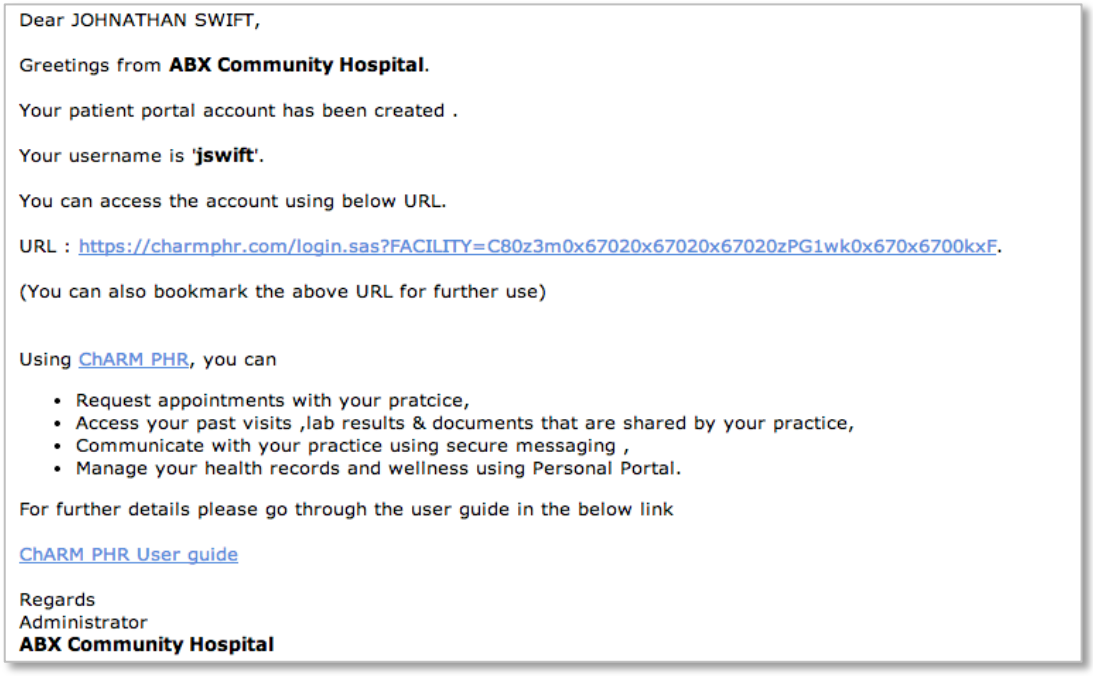
Note:

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 https://charmphr.com/ 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.



Dear JOHNATHAN SWIFT,

Greetings from **ABX Community Hospital**.

Your patient portal account has been created .

Your username is '**jswift**'.

You can access the account using below URL.

URL : https://charmphr.com/login.sas?FACILITY=C80z3m0x67020x67020x67020zPG1wk0x670x6700kxF.

(You can also bookmark the above URL for further use)

Using ChARM PHR, you can

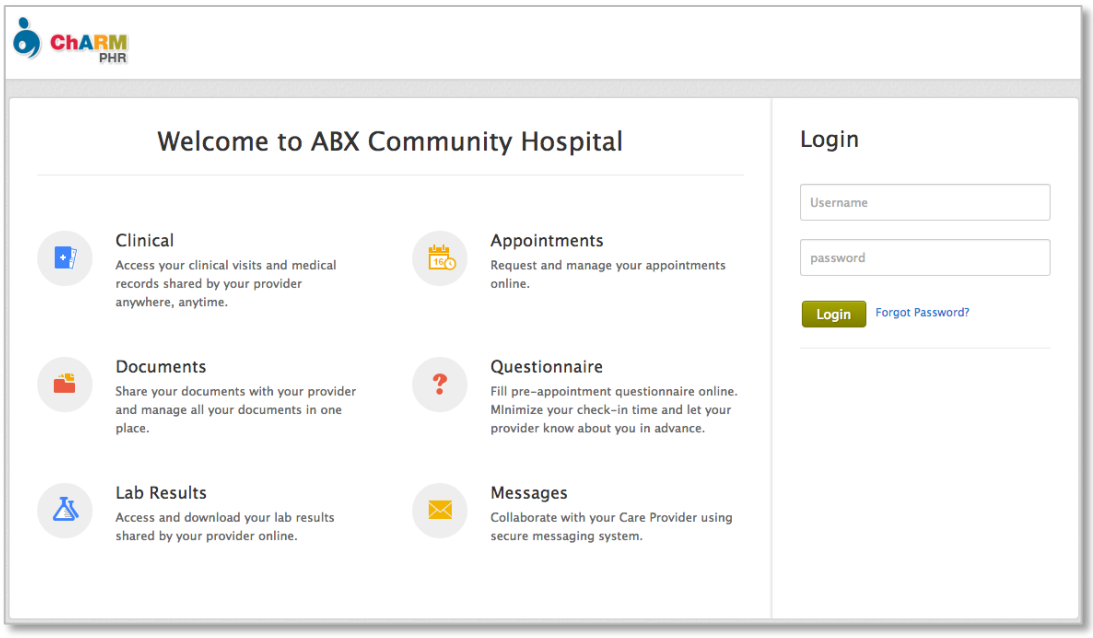
- Request appointments with your pratcice,
- Access your past visits ,lab results & documents that are shared by your practice,
- Communicate with your practice using secure messaging ,
- Manage your health records and wellness using Personal Portal.

For further details please go through the user guide in the below link

ChARM PHR User guide

Regards
Administrator
ABX Community Hospital

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

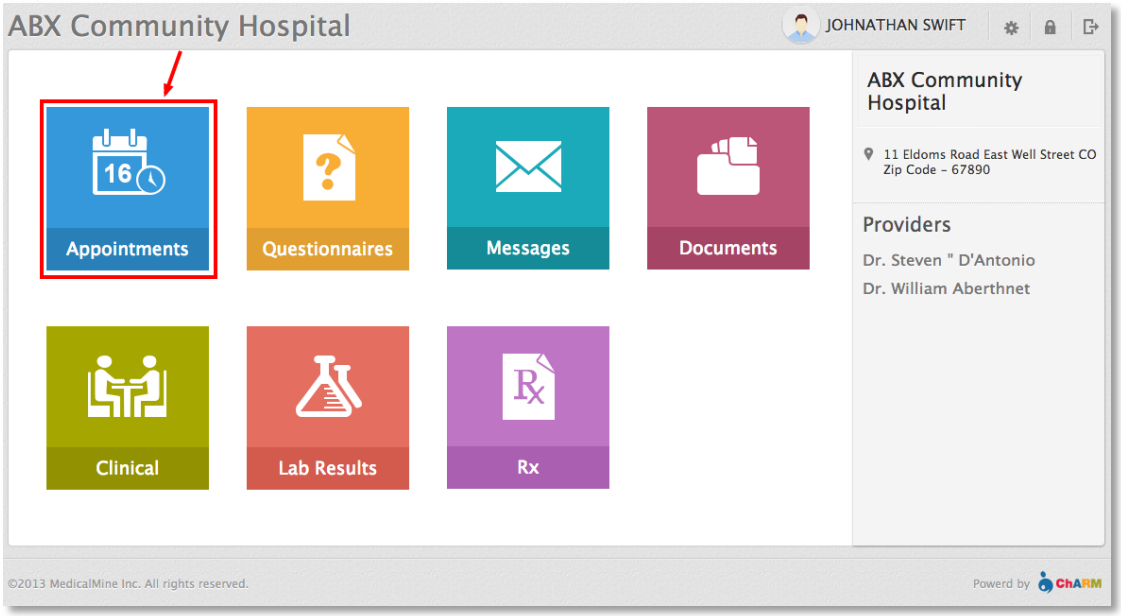


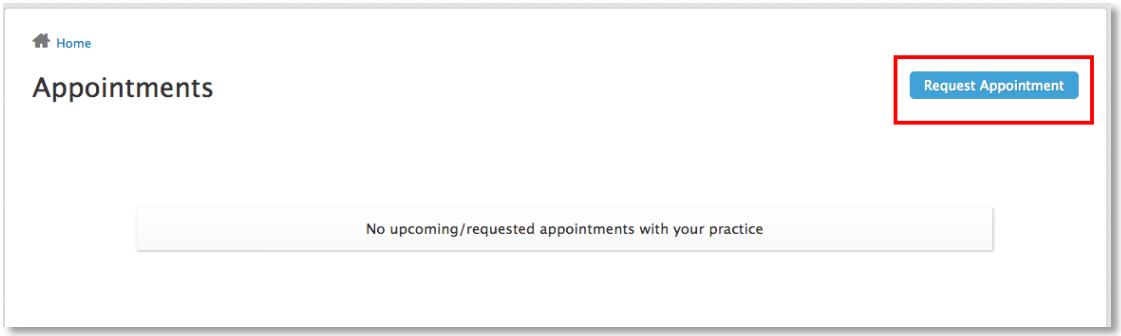
In addition, you can also login to patient portal from ChARM PHR home page at https://charmphr.com

Appointment Request

To schedule an appointment with your provider,

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



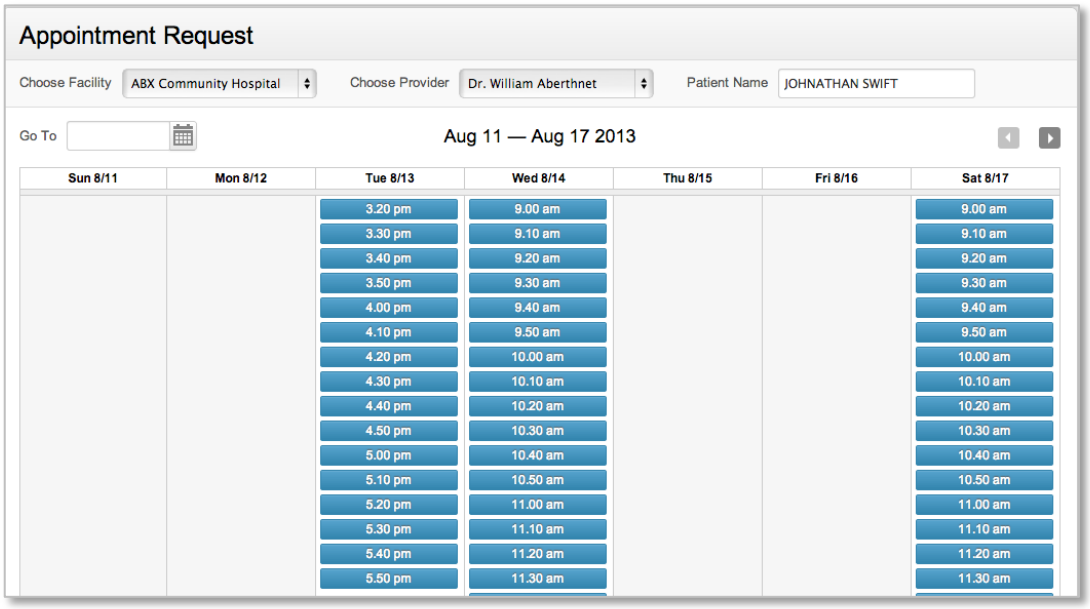


The appointment request page lists all the providers in your practice.

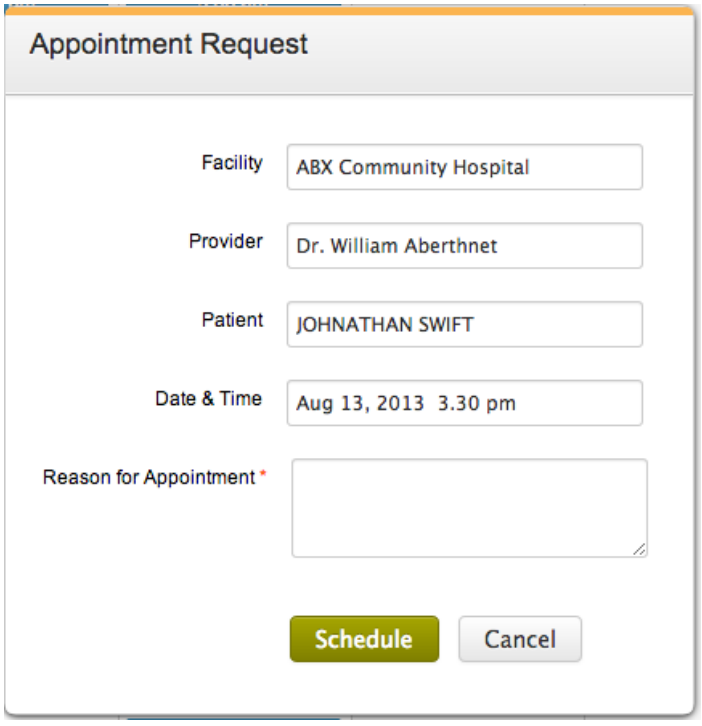
Choose the provider with whom you want an appointment.

Option 1:

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



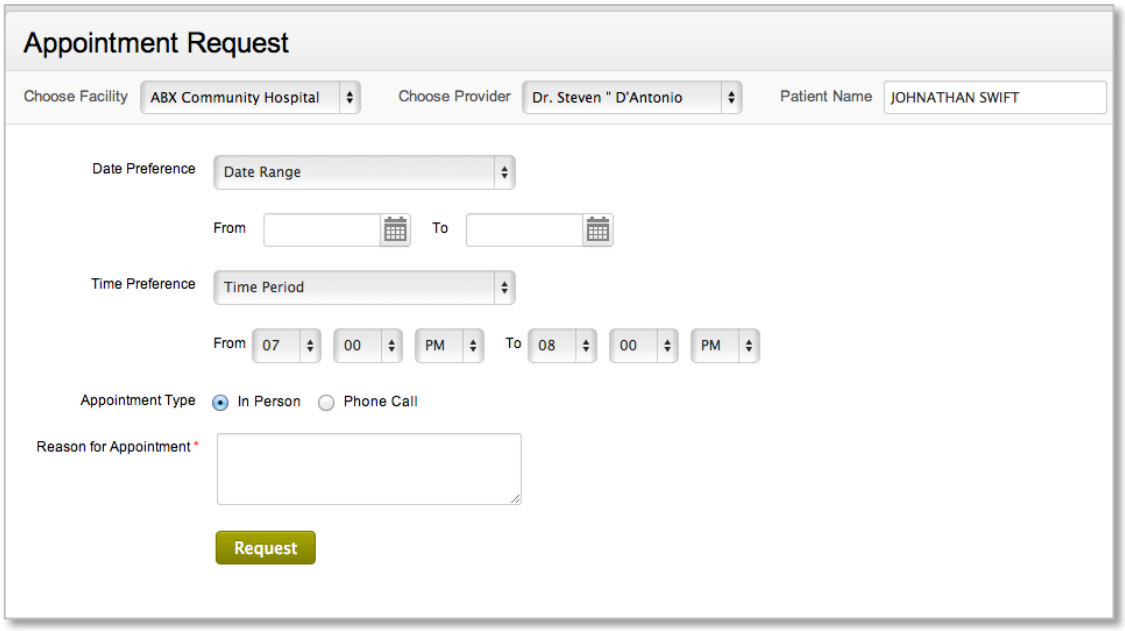
- Choose a convenient time by clicking on the slot
- Enter Reason for Appointment
- Click on 'Schedule



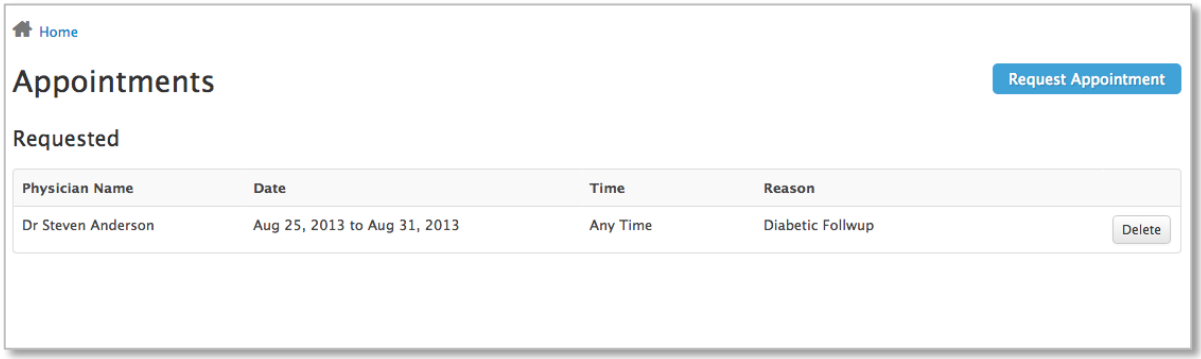
Option 2:

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'

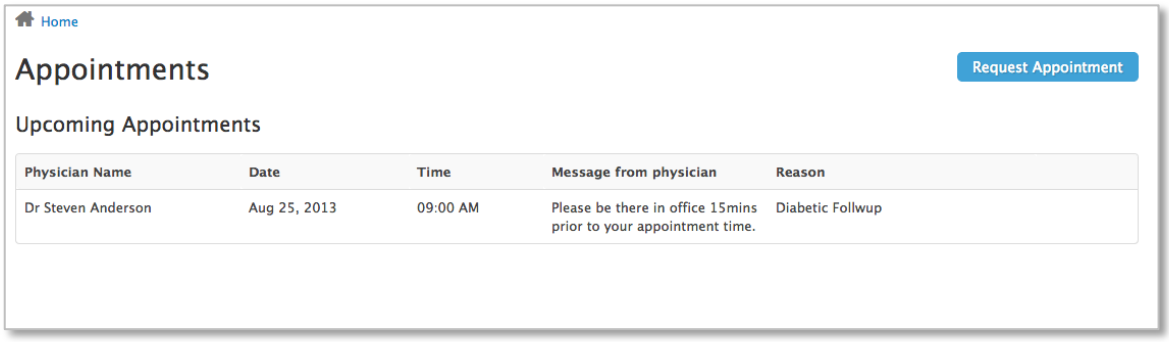


On submitting the form, Appointment request mail will be sent to your Provider. The appointment requests are also listed in patient portal under Requested Appointments section.



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

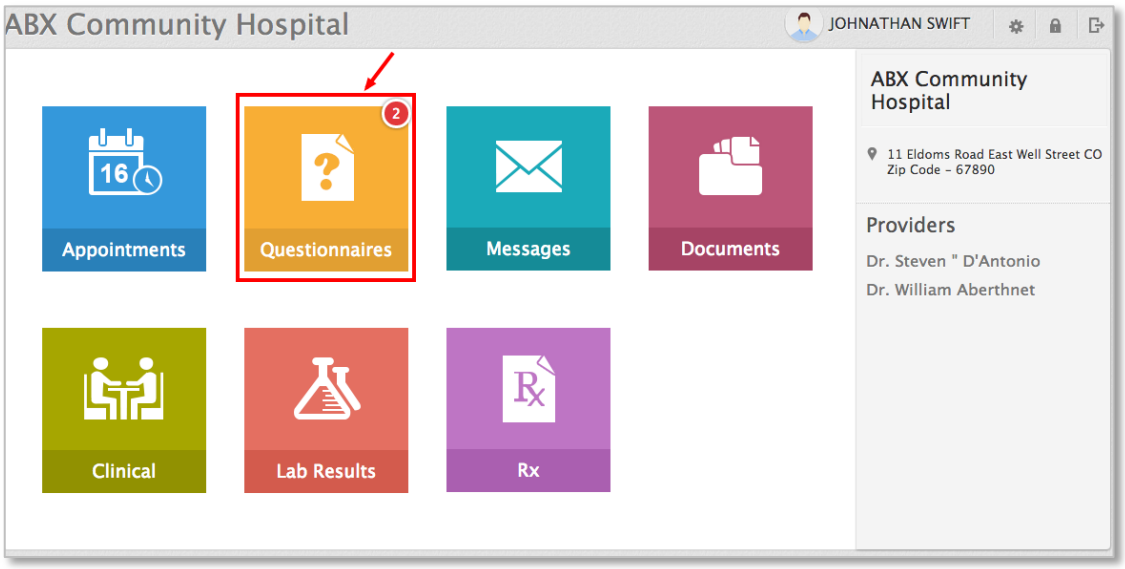
The confirmed appointments are listed under Upcoming Appointments section of patient portal.



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.



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

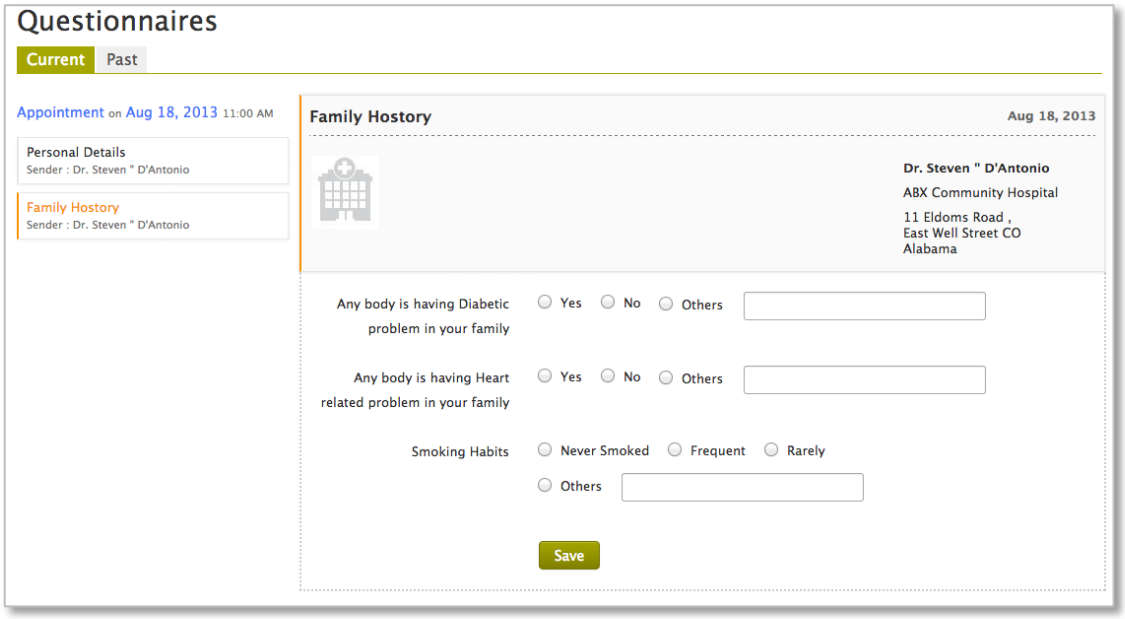
In addition, a notification icon (with count) is shown on top right corner of Questionnaires section if you have any questionnaires to fill.

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.



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.

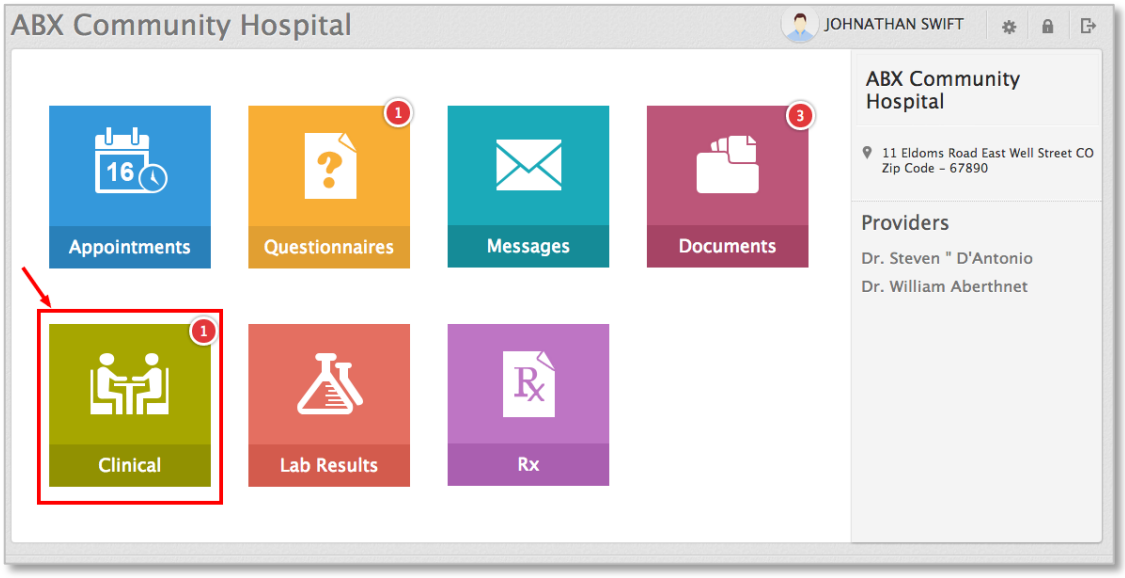
You can partially fill a questionnaire, save and continue it latter.

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

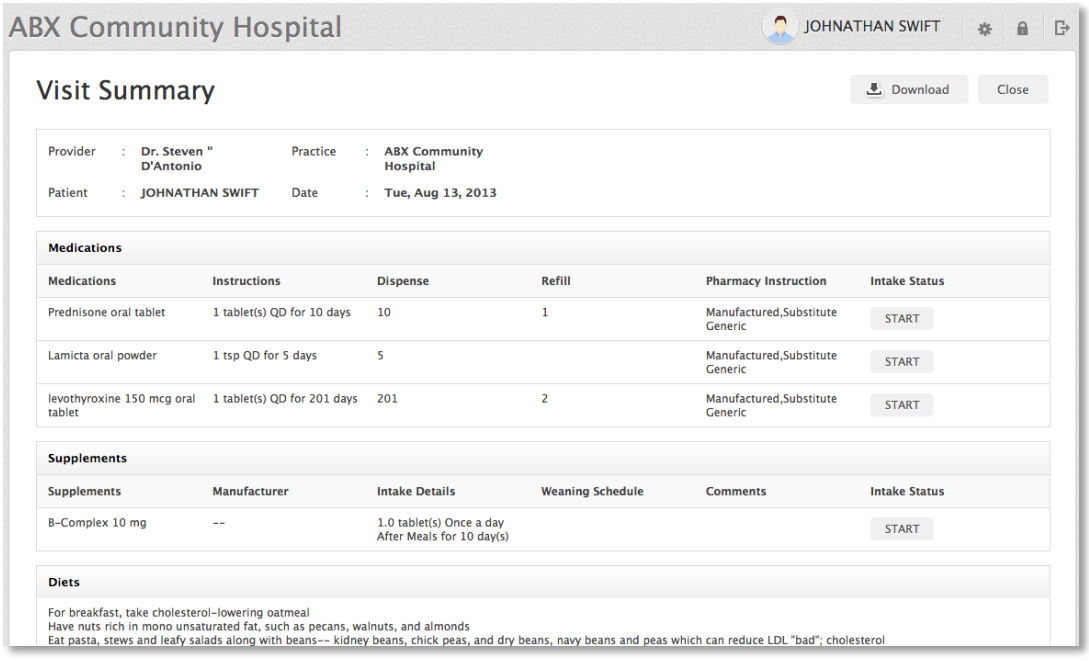
Access Visit Summary

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

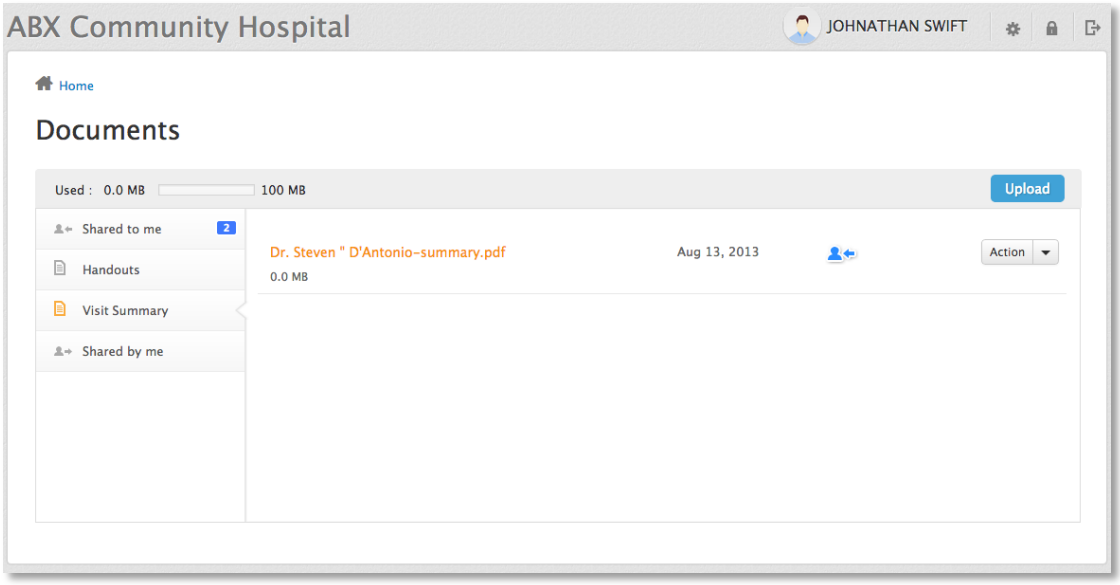
A notification icon is shown on top right corner of Clinical section, whenever you get a visit summary. You will also receive an email notifying this.



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



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

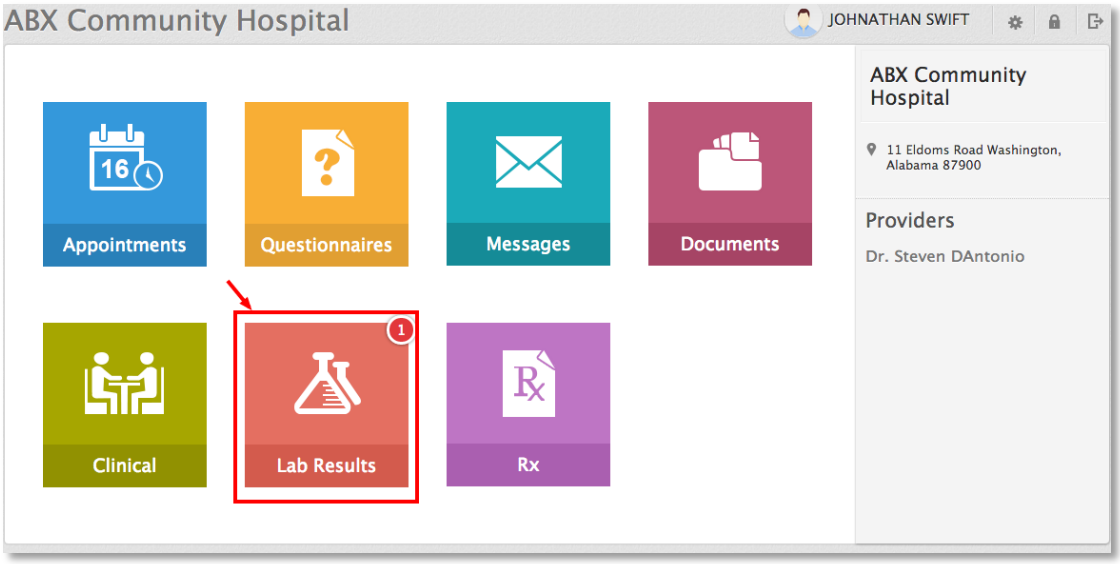


Access Lab Results

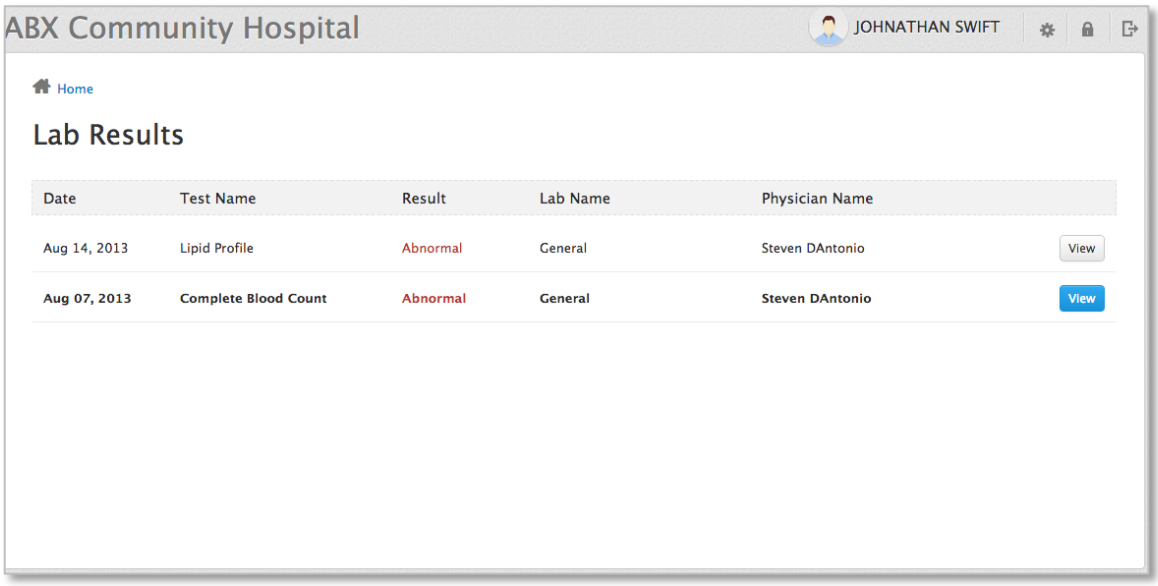
You can access the lab results shared by your practice under Lab Results section.

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

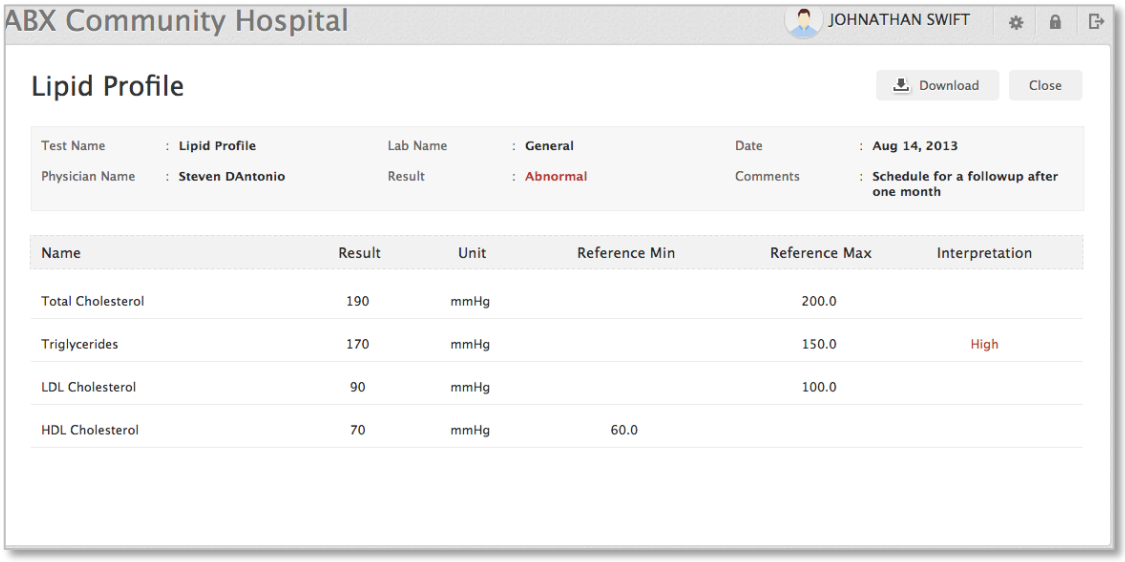
You will also receive an email notifying this.



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



You can also download the result as PDF.

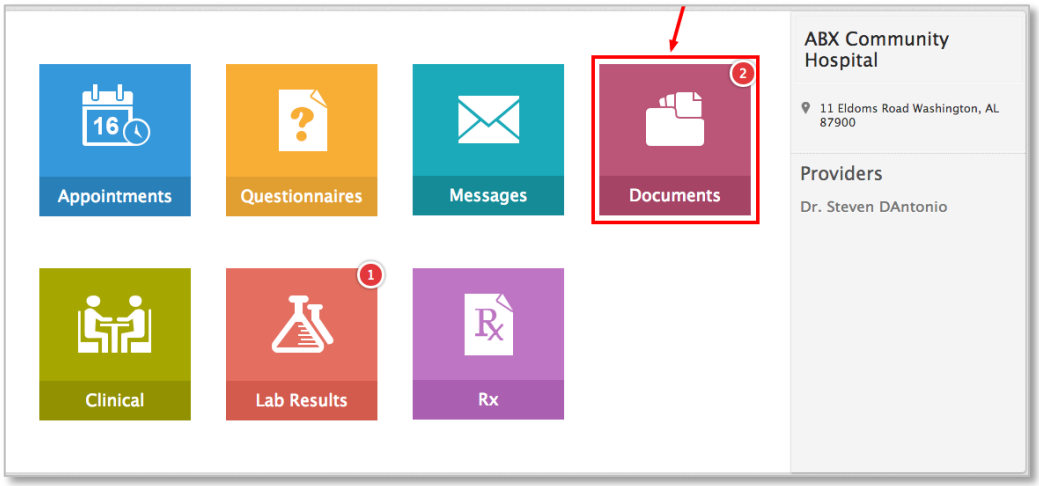


Access Documents

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

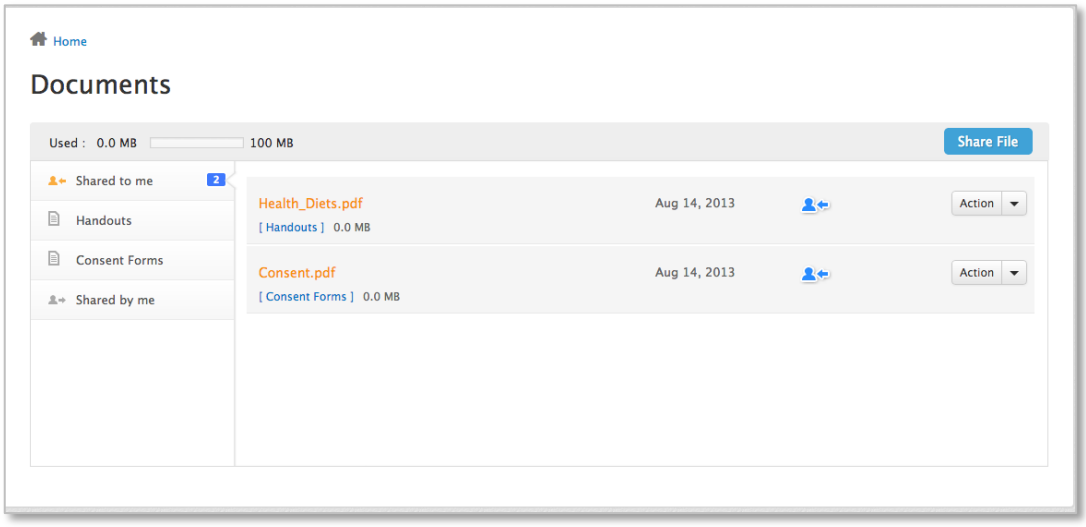
A notification icon is shown on top right corner of Documents section, whenever you get new documents from your practice.

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.

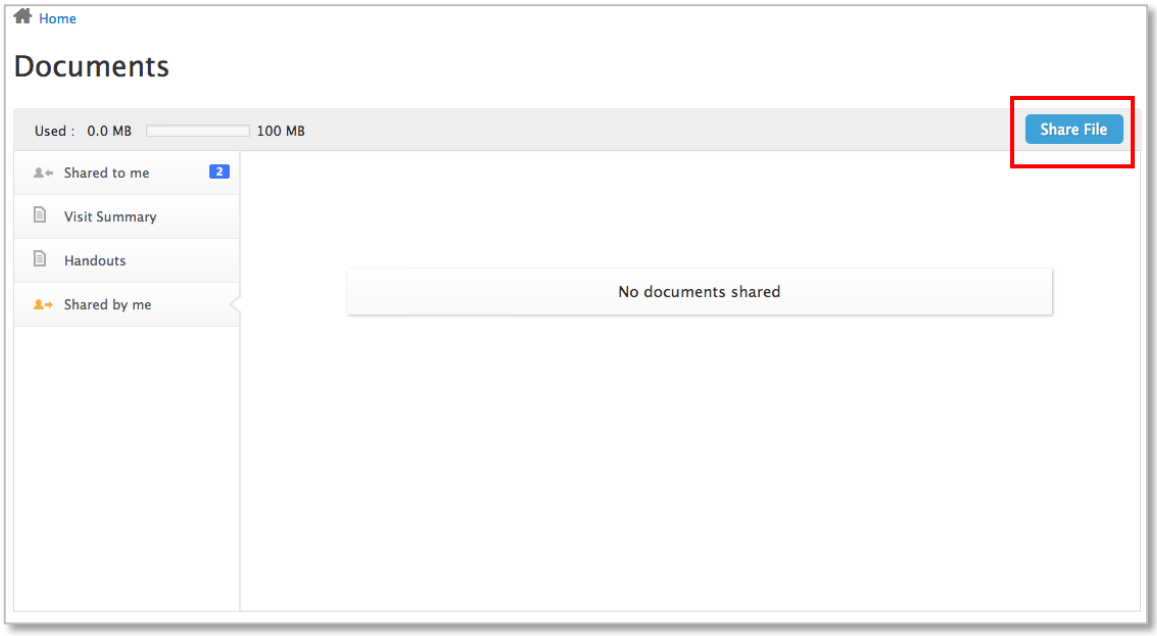


You can also download the files by using 'Action' > 'Download' menu.

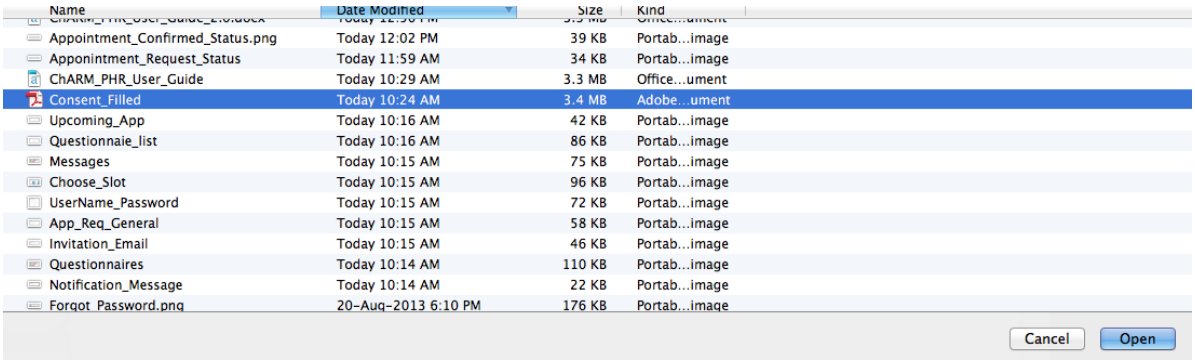
Share Documents with Practice

You can share your documents with practice from Documents section.

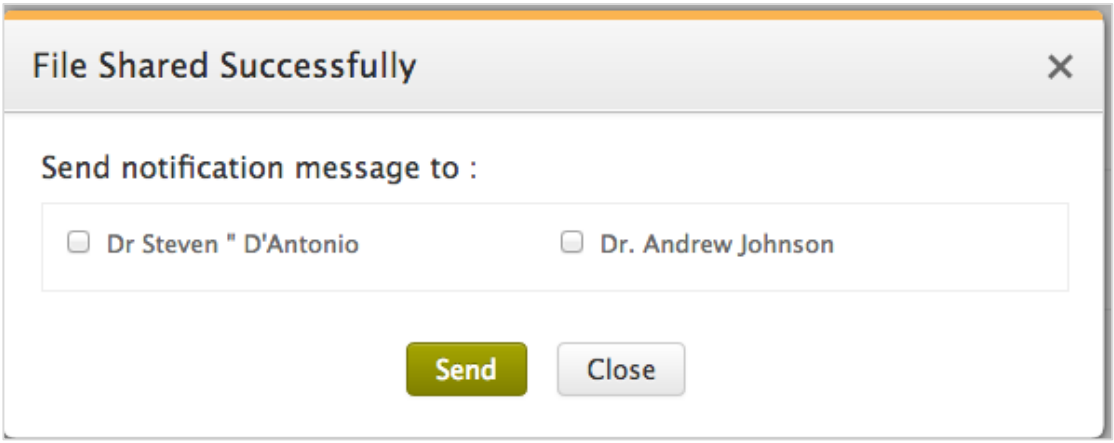
To share a document, click on the 'Share File' button, which brings a file chooser dialog.



Choose the required file from your computer.

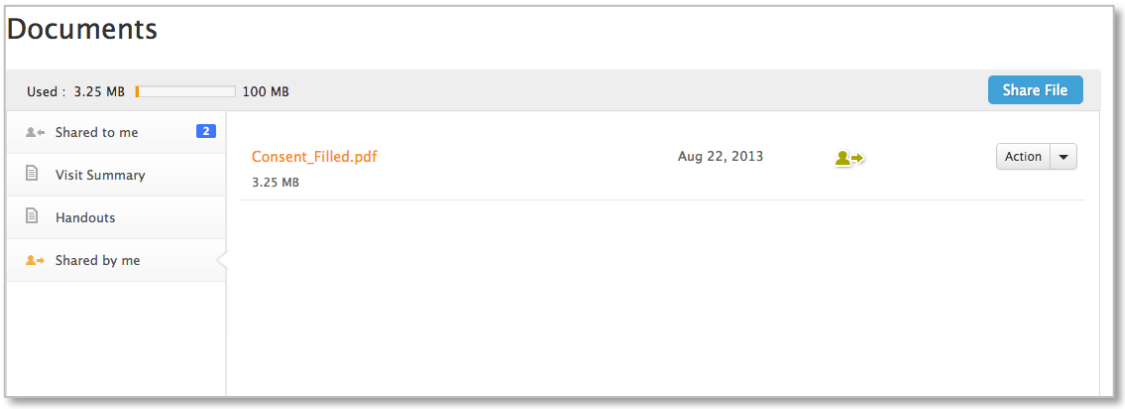


Select the practice member(s) to be notified about file sharing.



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

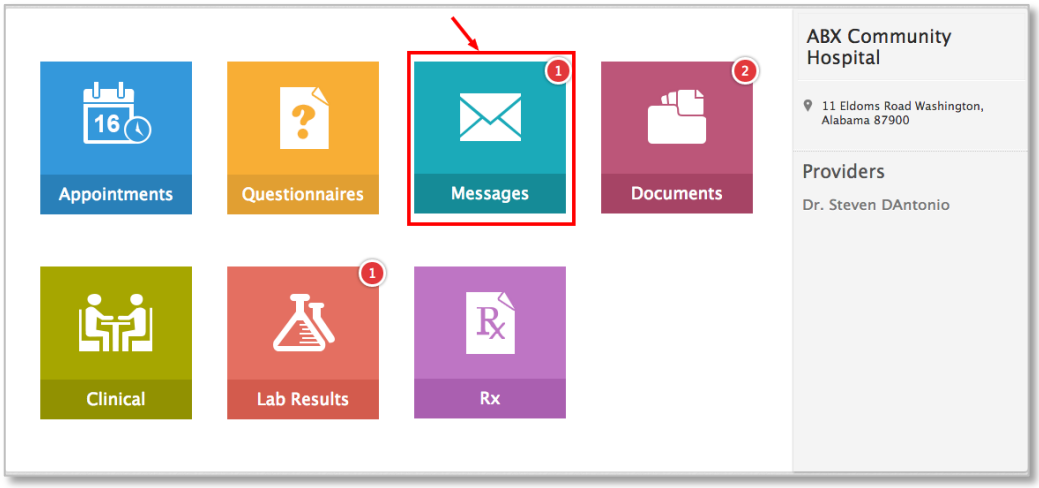
All the documents shared by you are listed under Documents > 'Shared by me' section.



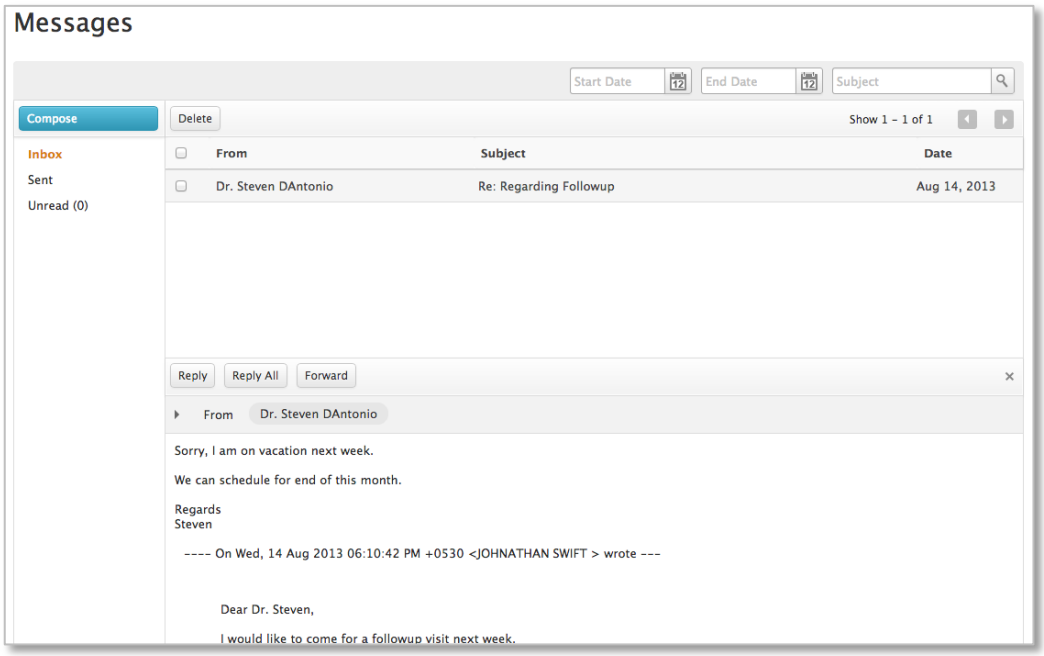
Send Message to Providers

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.

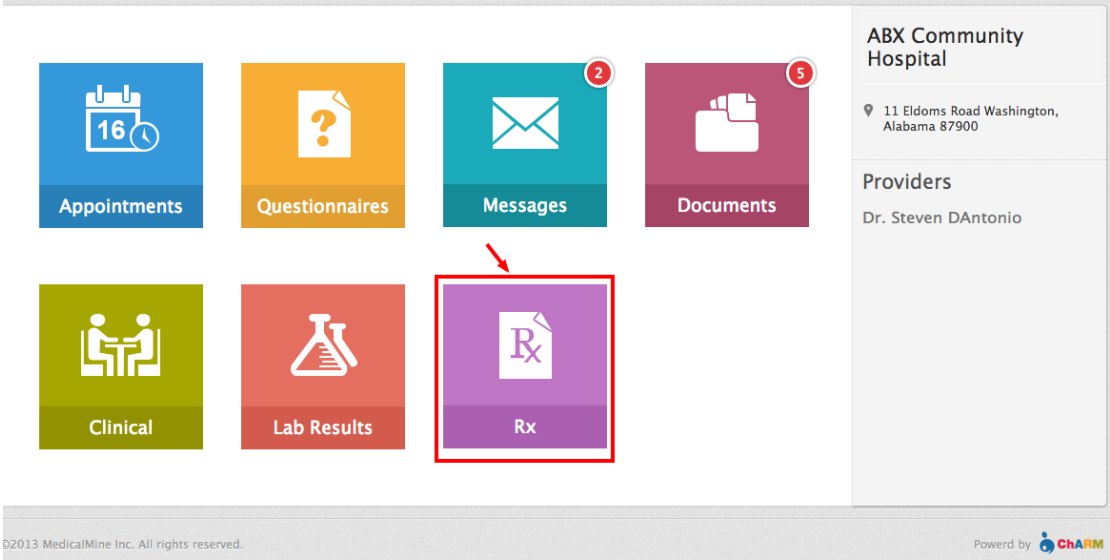


Click on the message to view the details. Use the Compose option to send message to your provider.



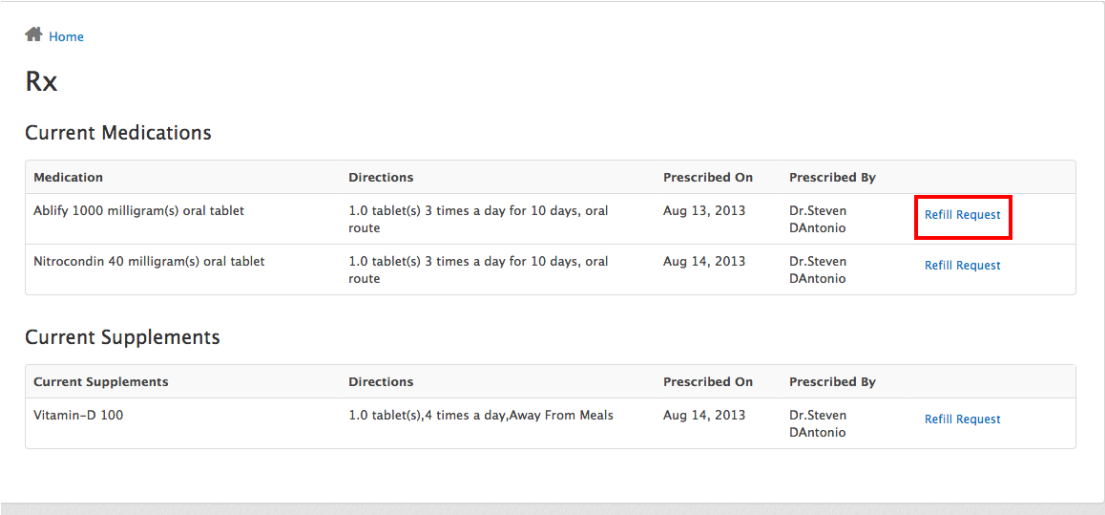
Medication Refill

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

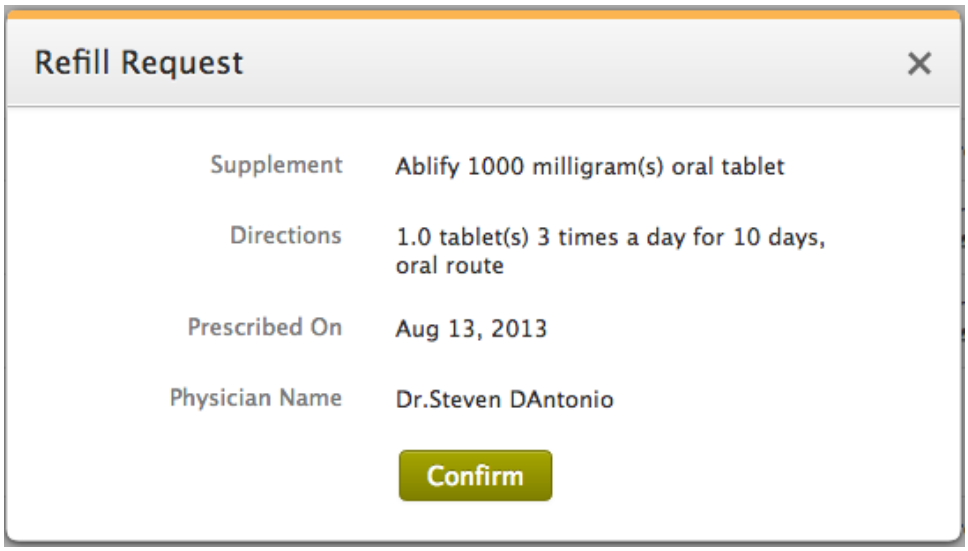


To send refill request for a medication

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



Check the medication details and confirm the request.



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.

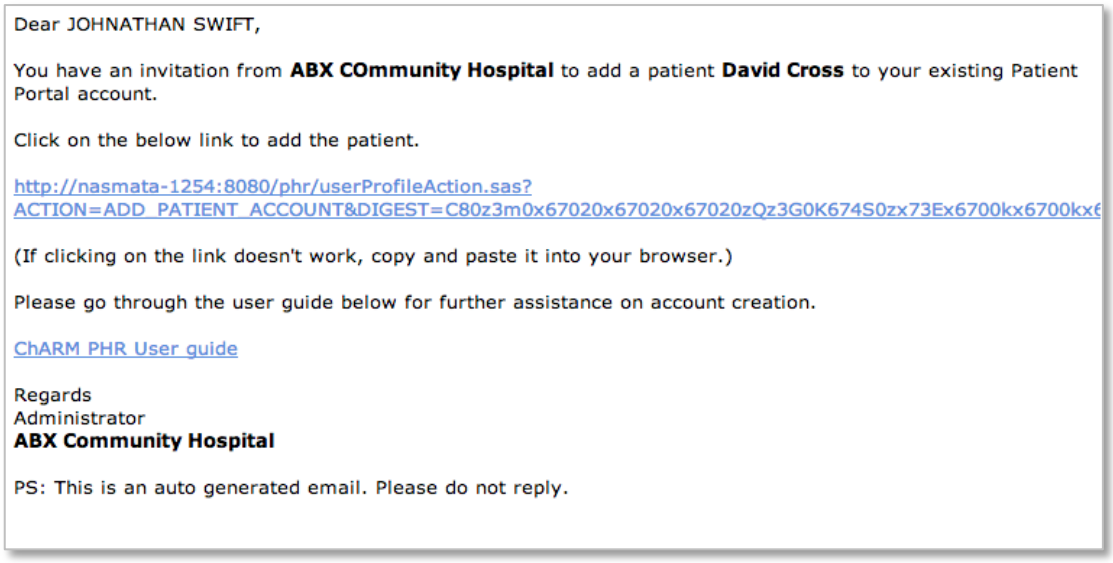
Adding Family Members to Your PHR Account

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.



Dear JOHNATHAN SWIFT,

You have an invitation from **ABX COmmunity Hospital** to add a patient **David Cross** to your existing Patient Portal account.

Click on the below link to add the patient.

http://nasmata-1254:8080/phr/userProfileAction.sas?
ACTION=ADD_PATIENT_ACCOUNT&DIGEST=C80z3m0x67020x67020x67020zQz3G0K674S0zx73Ex6700kx6700kx6

(If clicking on the link doesn't work, copy and paste it into your browser.)

Please go through the user guide below for further assistance on account creation.

ChARM PHR User guide

Regards
Administrator
ABX Community Hospital

PS: This is an auto generated email. Please do not reply.

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.

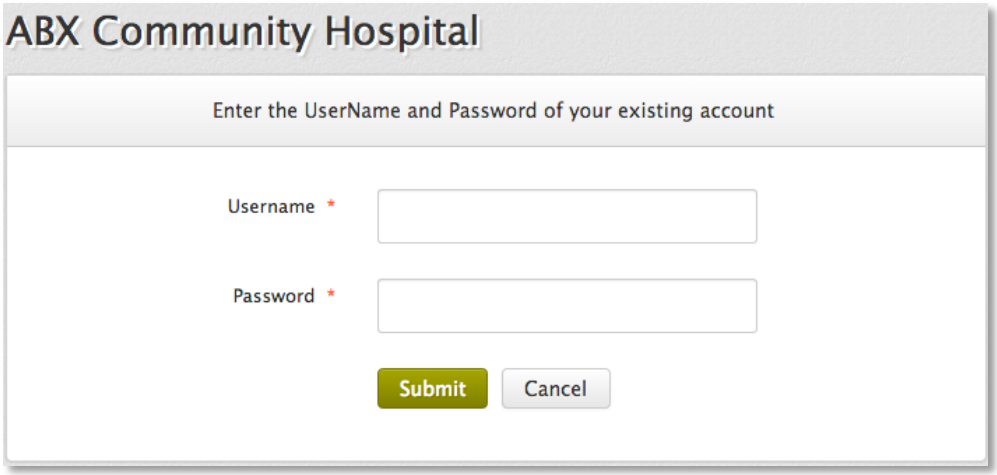
Note:

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.

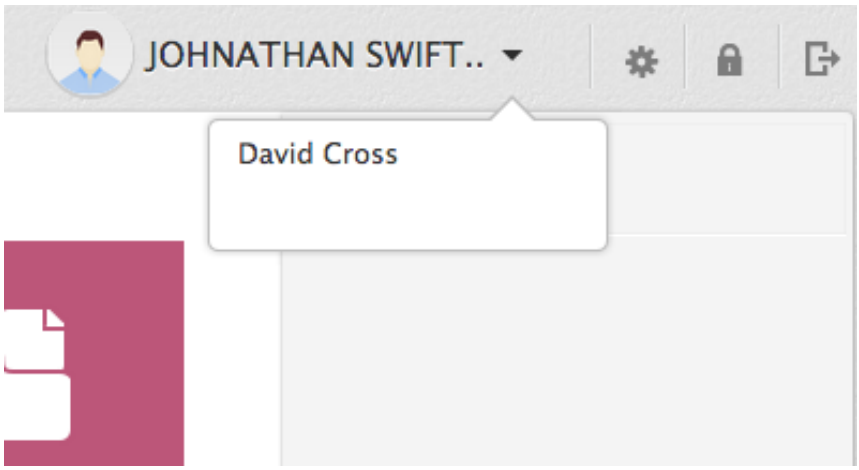
Step 2:

Enter Username and Password of your existing Patient Portal account.



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.

To reset your account password

- Go to https://charmphr.com
- 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:

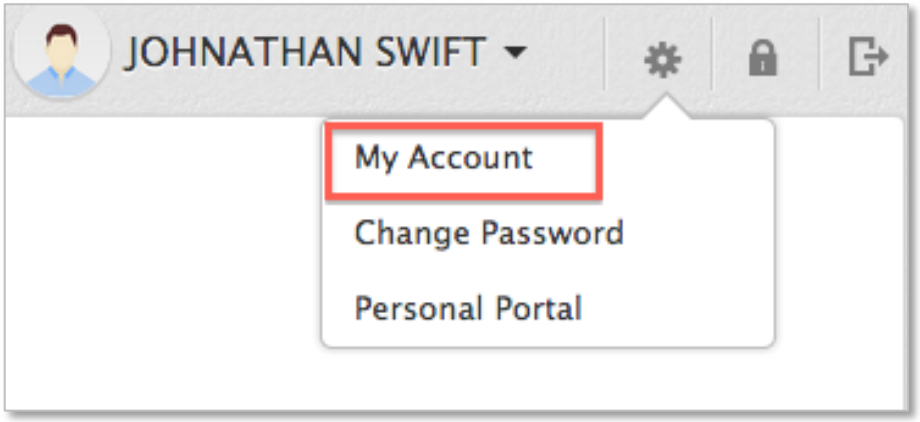
Check the SPAM folder if have not received password reset email.

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

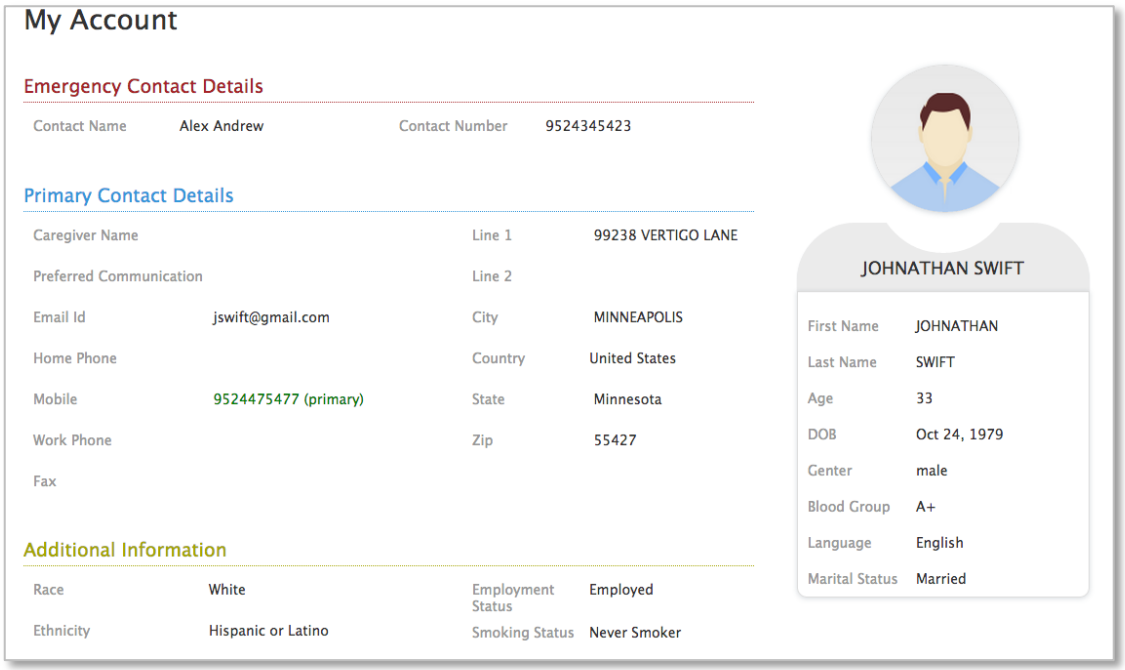
For your reference, account username is mentioned in the password reset email.

Patient Demographics

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



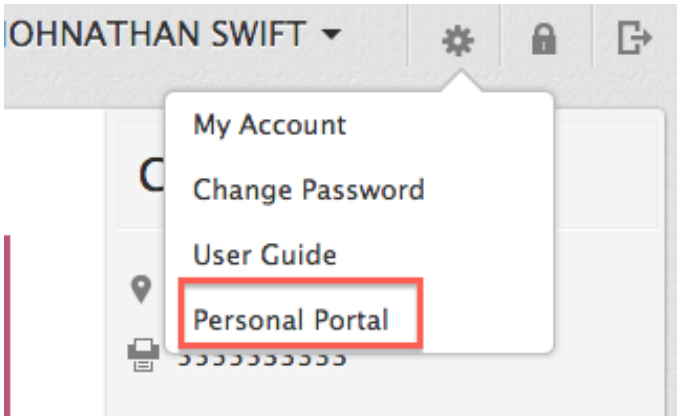
The details shown in this section are based on the records in your practice. This is a read only view. If you would like to update any details, please contact your practice.



Personal Health Portal

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

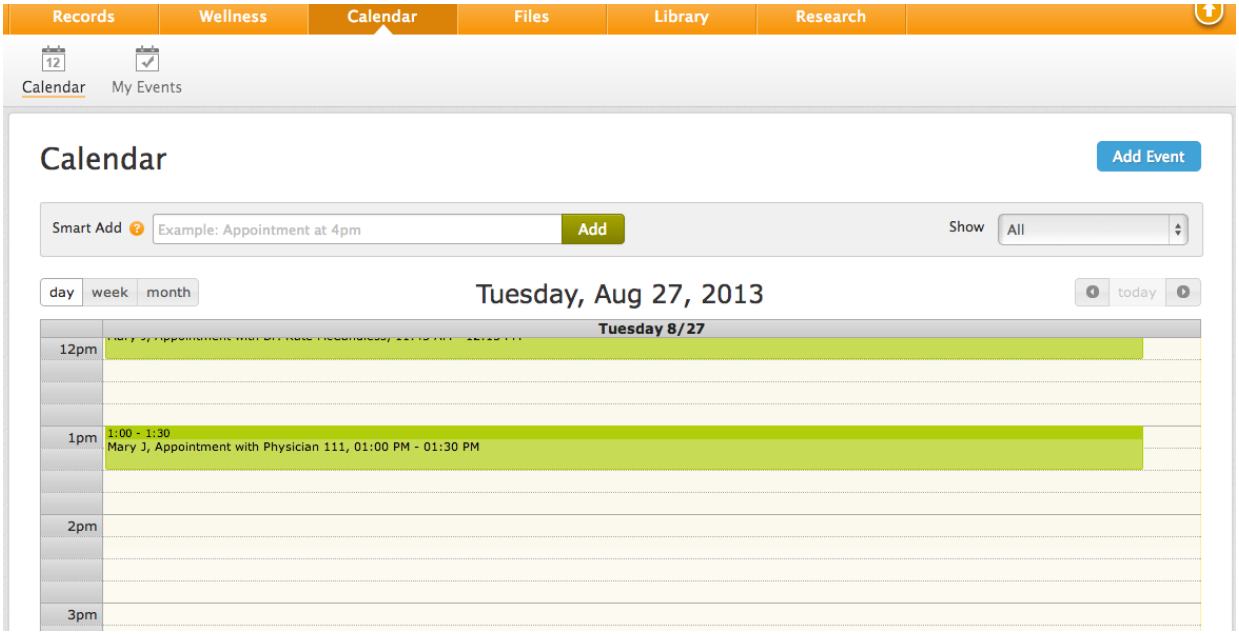
The Personal Portal is accessible under Settings icon.



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
Observations
Custom Programs
Academic Tracking
ATEC
QEESI
Growth Chart
Trackers
Add Tracker
General
Action
Weight
176.0 lbs
17 Jul 2013
62
176
BMI
26.76
17 Jul 2013
27.56
26.76
Pulse Rate
Action
Pulse Rate
22.0 bpm
27 Sep 2010
1
22


Records
Wellness
Calendar
Files
Library
Research
Calendar
My Events
Calendar
Add Event
Smart Add
Example: Appointment at 4pm
Add
Show
All
day
week
month
Tuesday, Aug 27, 2013
today
Tuesday 8/27
12pm
1pm
1:00 - 1:30
Mary J, Appointment with Physician 111, 01:00 PM - 01:30 PM
2pm
3pm