In this document you will learn how a patient registers a portal account and uses the portal to send and receive messages, access documents and health information, and pay their bill online.
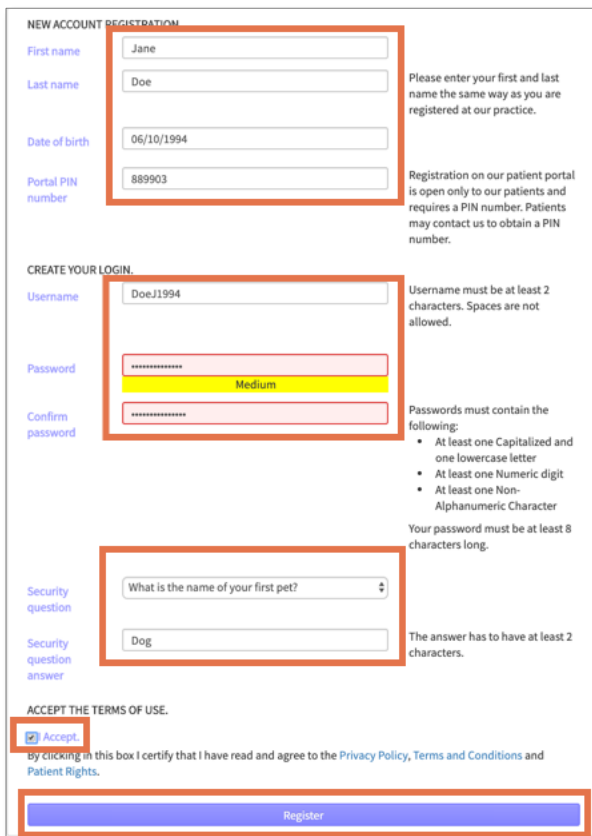
Register for a Portal Account

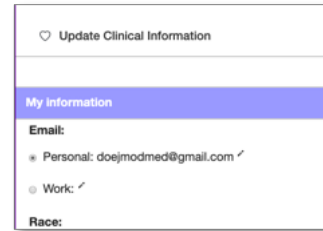The practice sends an invitation to the patient's email inviting them to register an account.

1. Within the email, the patient will click the hyperlink within the portal invitation email to create a login.
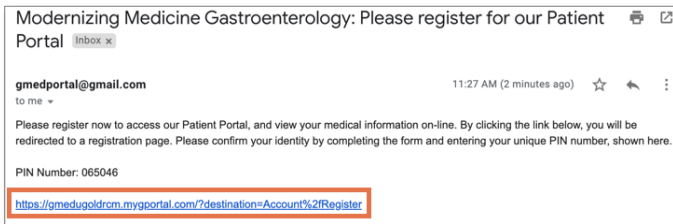
2. The patient will be prompted to enter first name, last name, date of birth, and the unique PIN provided in the invitation email (highlighted above).
3. Enter the desired username, password, and confirm password.
4. Select a security question and enter the security question answer.
5. Click "**I accept**" to agree to the Terms of Use.
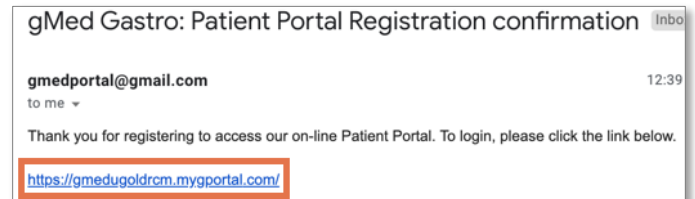6. Click **Register**.

7. Once registered, the *Update Clinical Information* screen displays. Complete all sections and click the **Submit** button.

Log into the Patient Portal

The patient may log into the portal after receiving an email from the practice, indicating new activity on the account.
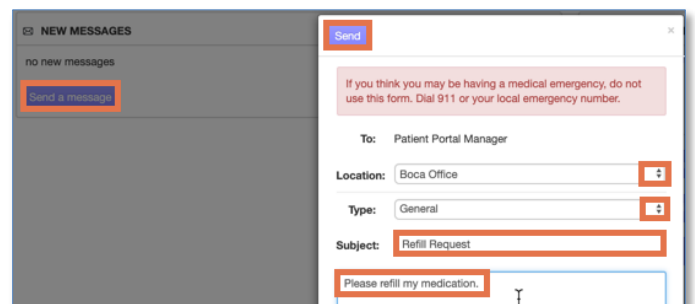
1. Click the link provided in the email.

2. Enter the username and password on the portal home page and click **Sign In**.

Patient Portal Home Page

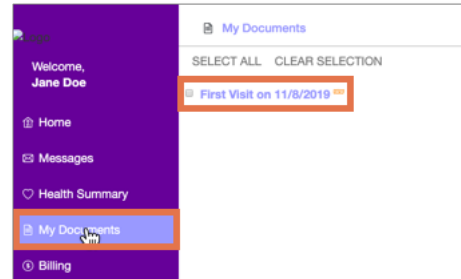Once the patient logins to the portal website, the *Home Page* appears.

- **New Messages:** Any new messages sent by the practice will be displayed on the home page.
  ➢ To send a message to the practice, click **Send a message.**
  ➢ Choose the **Location** and **Type** from the drop-down arrows**,** then free text the **Subject and Message.**
  ➢ Click **Send.**

- **Update your information:** Click to update demographic information and medical history.
- **Request an appointment:** Opens a portal message that is defaulted to an "appointment" type message.
  - ➤ Select the **Location** and **Message type** by clicking on the drop-down arrows, then free text in the **Subject** and **Message** fields.
  - ➤ Click **Send**.
- **Pay your bill:** Click to access Online Bill Pay. *gPM only*

Portal Navigation Panel

On the left-hand side of the *Home Page*, seven icons are displayed:

- **Home:** Displays alerts for New Messages, Upcoming Appointments and New Documents.

- **Messages:** Displays Inbox Messages, Sent Messages and Deleted Messages.

- **Health Summary:** Click to view the Health Summary. Click **Download** to save the document.
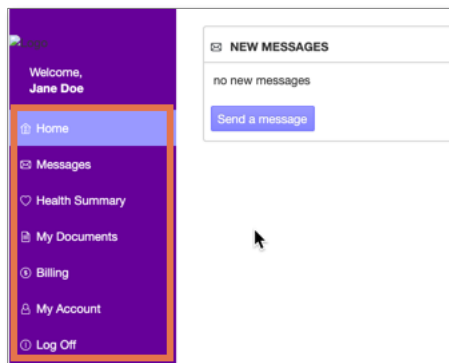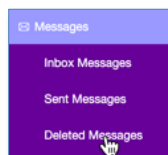

- **My Documents:** Click to view all documents sent by the practice. Unread documents have a *New* icon appearing immediately after the document title. An email is sent to the patient with the subject line: "[Practice Name]: New patient portal activity." when documents are published to their portal account.

- **Billing:** Click to access Online Bill Pay. *gPM Only*
- **My Account:** Click to change the portal username, password, grant access to a family member or caregiver, or view the history of the portal account.
- **Log Off:** Click to log out of the patient portal session and return to the login page.