

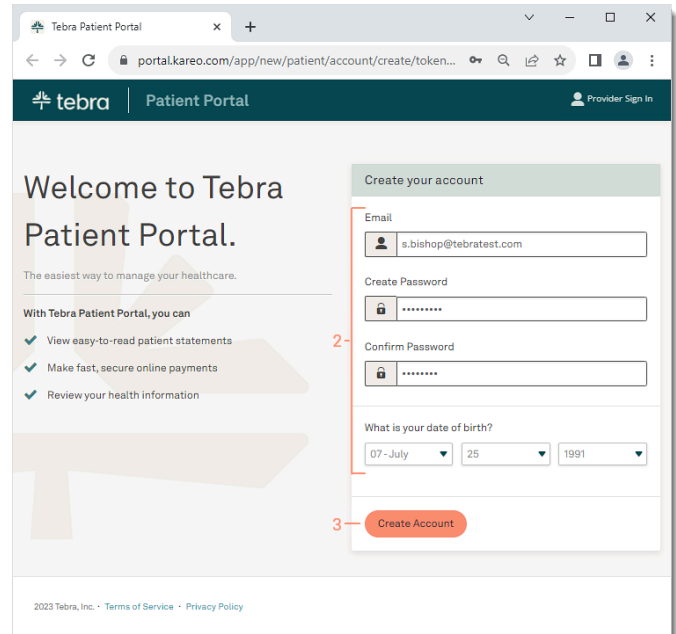
Patient Experience: Patient Portal

The *Patient Portal* is an easy way for patients to view their health record online. Patients can review their problems, allergies, medications, eLab results, vitals, shared treatment plans, and make an online payment. They can also message their providers and authorize access for a guest to view their account.

Activate Patient Portal

After the practice [invites the patient](#) to the *Patient Portal*, the patient receives an email invitation to activate their account.

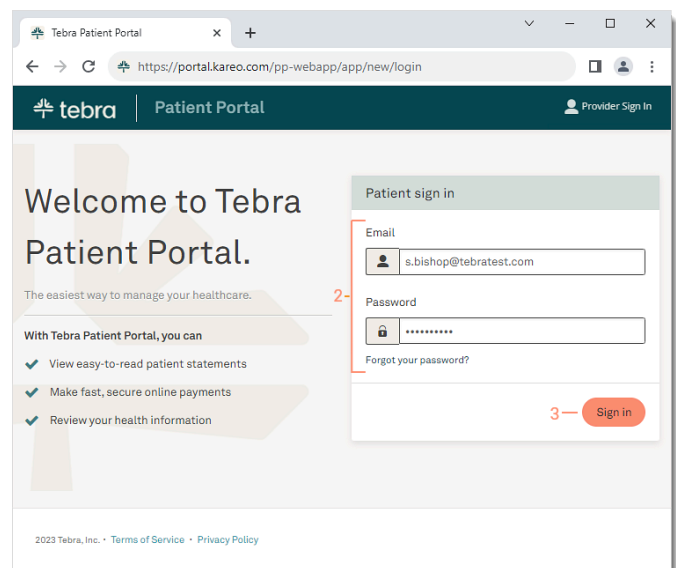
1. In the email invitation, the patient clicks **Get Started**. The [Patient Portal](#) create account page opens.
2. The patient creates a *Password* and enters their *Date of Birth*.
Note: The *Email* auto-populates from the email invitation.
3. Patient clicks **Create Account**. The account is created and the [Patient Portal dashboard](#) opens.



Access Patient Portal

After the account is activated, patients can log into the *Patient Portal* anytime through their mobile device or computer.

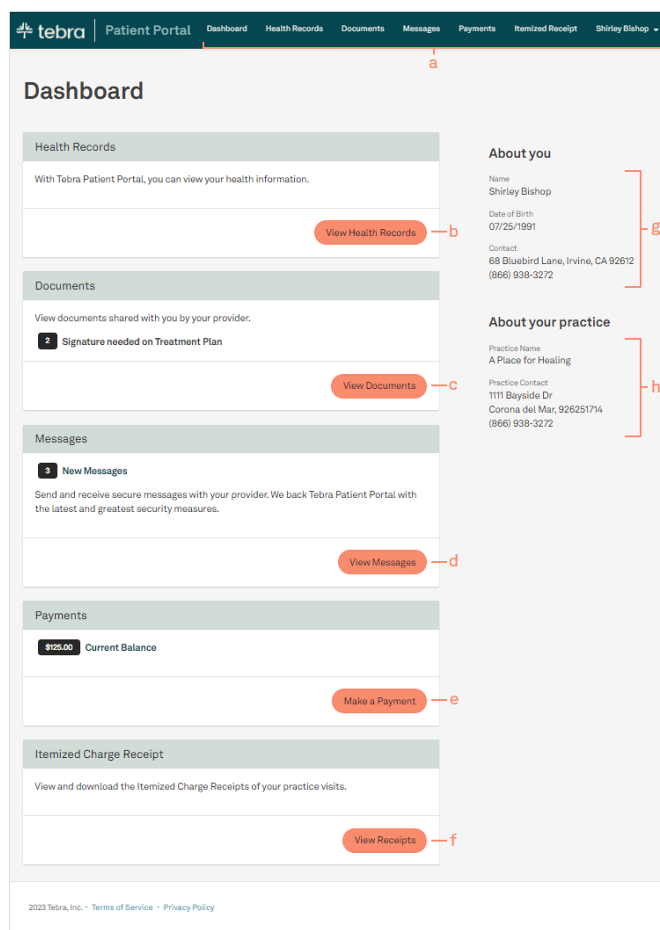
1. The patient opens portal.kareo.com in a web browser. The *Patient Portal* page opens.
2. Patient enters their *Email* and *Password*.
3. Patient clicks **Sign in**. The *Dashboard* opens.



Navigate Dashboard

After the patient logs in, they can access their health information, documents, and more from the Dashboard.

- a. **Top Menu:** Click to access the *Dashboard*, *Health Records*, *Documents*, *Messages*, *Payments*, or *Itemized Receipt*. Click on the *Patient Name* to access [My Account](#) or to log out.
- b. **Health Records:** Click **View Health Records** to review health information such as: eLab results, vitals, medications, problems, and allergies.
- c. **Documents:** Click **View Documents** to review shared documents such as treatment plans, patient education, or uploaded documents. A notification displays when a treatment plan signature is requested by the provider.
- d. **Messages:** Click **View Messages** to send and receive messages secure with the provider. A notification displays when a new message is received.
- e. **Payments:** If applicable, click to make an online payment, view the bill, or view previous portal payments.
Note: Practices must be [Tebra Payments](#) or [Patient Collect \(Stripe\)](#) activated for patients to access the payments section.
- f. **Itemized Charge Receipt:** If applicable, click to view and download itemized receipts for their visits.
Note: Practice must enable the [Receipt on Patient Portal setting](#), for patients to access this section.
- g. **About you:** Patient details on file with the practice.
- h. **About your practice:** The practice address and contact information.



Navigate Health Records

After clicking **View Health Records** from the [Dashboard](#), the patient can review their health information.

- Actions:** Click to [view](#), [download](#), [send by direct message](#), or [email](#) the summary of care.
- Labs & Studies:** Displays recent [eLab orders](#) and applicable notes.
 - Click **View All** to display all labs.
 - Click on the lab to view results and provider comments.
- Vitals:** Displays [recorded vitals](#).
- Medications:** Displays [active medications](#).
- Problems:** Displays [active problems](#).
- Allergies:** Displays [active allergies](#).

tebra | Patient Portal | Dashboard | Health Records | Documents | Messages | Payments | Itemized Receipt | Shirley Bishop

Shirley Bishop's Health Records

This record contains your latest health information.

Actions (a)

- View Health Records
- Download Health Record
- Send to New Doctor
- E-mail Health Record

Labs & Studies

Test	Date	Result
Glucose	06/02	-
CBC	06/02/2023	-
Urinalysis	06/02/2023	-
Lipid Panel	06/02/2023	Normal results
Comprehensive Metabolic Pan...	06/02/2023	-

[View All](#)

Vitals

Date	BP	HR	Temp	RR	HT	WT	BMI	SpO2	Inhaled Oxygen
01/12/2023	120.0 / 80.0	88.0 bpm	97.9 F	12.0 rpm	5' 5"	175 lbs	19.14	--	--
05/06/2022	120.0 / 80.0	86.0 bpm	98.8 F	12.0 rpm	5' 5"	179 lbs	19.8	99.0 percent	--
12/30/2021	120.0 / 80.0	85.0 bpm	98.1 F	12.0 rpm	5' 5"	120 lbs	19.97	99.0 percent	--
11/29/2021	120.0 / 80.0	85.0 bpm	98.1 F	16.0 rpm	5' 5"	117 lbs	19.47	99.0 percent	--
11/10/2021	120.0 / 80.0	84.0 bpm	98.2 F	16.0 rpm	5' 5"	119 lbs	19.8	99.0 percent	--

[View All](#)

Medications

Fiorice Allergy Relief 50 mcg/actuation nasal spray/suspension

Status: Active

Frequency: 1 spray(s) in each nostril once a day

Start Date: 05/06/2022

Prescribed by: -

Sudafed Sinus 120H Pressure-Pain 220 mg/120 mg tablet,extended release

Status: Active

Frequency: 1 tablet(s) 2 times a day

Start Date: 07/06/2023

Prescribed by: -

Problems

Chronic sinusitis (disorder)

Status: Active

Start Date: 01/10/2023

Allergic rhinitis (disorder)

Status: Active

Start Date: -

Allergies

peanut allergen extract

Status: Active

Type: DRUG

Reaction: hives

Severity: Moderate

Care Team

A Place for Healing

Status: Active

Practice: A Place for Healing

Contact: 1111 Bayside Dr
Corona del Mar, 92625/74
(949) 938-3272

About you

Name: Shirley Bishop

Date of Birth: 07/25/1991

Contact: 68 Bluebird Lane, Irvine, CA 92612
(866) 938-3272

Sex: Female

Race: Patient decline to specify, Decline to specify

Ethnicity: Patient decline to specify, Decline to specify

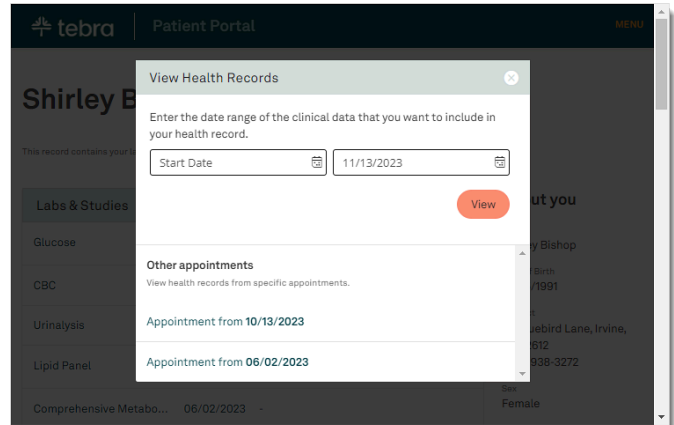
Language: -

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View Health Record

From the [Health Records](#) page, the patient can view their health records for a specific time frame.

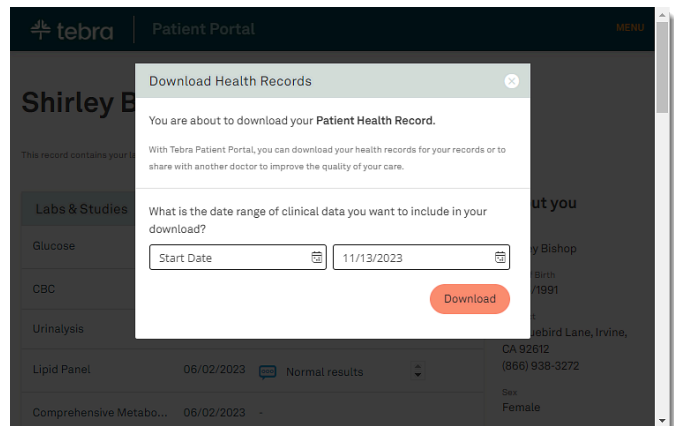
1. Click **Action** and select *View Health Record*. The *View Health Records* pop-up window opens.
2. View all health records or by specific appointments:
 - To view all health records, select the date range. Then, click **View**. The summary of care opens in a new browser.
 - To view health records from specific appointments, click the Appointment Date. The summary of care opens in a new browser.



Download Health Record

From the [Health Records](#) page, the patient can download their health records.

1. Click **Action** and select *Download Health Record*. The *Download Health Records* pop-up window opens.
2. Select the date range.
3. Click **Download**. A zip file is saved containing the XML files.



Send to New Doctor

From the [Health Records](#) page, the patient can send their health record to another provider. Patient must have the provider's direct message address to use this feature.

1. Click **Action** and select *Send to New Doctor*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's email address and optionally add comments.
4. Click **Transmit Record** when finished.

tebra Patient Portal

Shirley B

Transmit to Doctor

You are about to transmit your **Patient Health Record**.

With Tebra Patient Portal, you can securely transmit your health records to another doctor to improve the quality of your care.

1. Enter the date range of the clinical data that you want to include in your health record transmission.
Start Date: 11/13/2023
2. Provide the email address of the doctor you want to transmit your health record to.
3. Add any comments for the doctor.

Files: patient_health_record.xml, cda-html.xml, patient_health_record.html

E-mail Health Record

From the [Health Records](#) page, the patient can send their health record to another provider.

1. Click **Action** and select *E-Mail Health Record*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's email address and optionally add comments.
4. Click **Transmit Record** when finished.

tebra Patient Portal

Shirley B

Transmit to Doctor

You are about to transmit your **Patient Health Record**.

With Tebra Patient Portal, you can securely transmit your health records to another doctor to improve the quality of your care.

1. Enter the date range of the clinical data that you want to include in your health record transmission.
Start Date: 11/13/2023
2. Provide the email address of the doctor you want to transmit your health record to.
3. Add any comments for the doctor.

Files: patient_health_record.xml, cda-html.xml, patient_health_record.html

Navigate Documents

After clicking **View Documents** from the [Dashboard](#), the patient can review documents shared by the practice.

- Treatment Plans:** Displays treatment plans that [requires a signature](#) by the patient and [shared treatment plans](#). Click to view details and optionally download.
- Patient Education:** Displays [sent patient educations](#). Click **Download** to save the file.
- Documents:** Displays [sent patient documents](#).
 - To see the document, click **View**.
 - To save the document, click **Download**.

Date Shared	Name	From	Actions
11/06/2023	Treatment Plan (Start Date: 11/20/2023)	Diana Hudson	Signature Requested
08/01/2022	Treatment Plan (Start Date: 08/06/2022)	Diana Hudson	View

Date Shared	Name	From	Actions
06/08/2020	Coronavirus (COVID-19): Care Instructions	Diana Hudson	Download
06/06/2020	Chronic Cough: Care Instructions	Diana Hudson	Download

Date Shared	Name	From	Actions
11/06/2023	GAD-7	Diana Hudson	View Download
11/06/2023	PHQ-9	Diana Hudson	View Download
11/06/2023	COVID-19	Diana Hudson	View Download
11/06/2023	Credit Card Authorization Form	Diana Hudson	View Download
11/06/2023	HIPAA	Diana Hudson	View Download

Navigate Messages

After clicking **View Messages** from the [Dashboard](#), the patient can review messages sent by the practice or send a message to the provider.

- New Message:** Send new secure message to the provider.
- Inbox:** Displays [messages sent by the provider](#).
- Sent Messages:** Displays message sent to the provider.

From	Subject	Date
Diana Hudson	Need Refill	10/6/23 3:21 PM
Diana Hudson	Lab Results Available	4/7/22 11:21 AM
Diana Hudson	Lab Results available	3/11/21 3:44 PM

Send New Message

From the [Messages](#) page, patients can send a message to the provider.

1. Click **New Message**. The *New Message* page opens.
2. *Compose message*:
 - a. Select a provider from the *To* drop-down.
 - b. Enter the *Subject* and *Message* to the provider.
 - c. Optionally, attach an image or document (not to exceed 10MB).
3. Click **Send Secure Message** when finished. The message display in the provider's [Message Center](#).

The screenshot shows the 'New Message' form in the Tebra Patient Portal. The form is titled 'New Message' with a sub-header 'Your messages are always secure.' It includes a 'To' dropdown menu labeled 'Select a doctor', a 'Subject' text field, a 'Message' text area with a '1000 characters left' indicator, and an 'Attachments' section with a 'Drop documents here, or browse for files' prompt. A red bracket labeled '2' groups the 'To', 'Subject', and 'Message' fields. A red arrow labeled '3' points to the 'Send Secure Message' button at the bottom right. The page footer includes '2023 Tebra, Inc. - Terms of Service - Privacy Policy'.

Navigate Payments

After clicking **Make a Payment** from the [Dashboard](#), the patient can review their outstanding balance and detailed bills. Practices must be [Tebra Payments](#) or [Patient Collect \(Stripe\)](#) activated for patients to access the payments section.

- a. *Current Balance*: Displays the current patient balance. Click [Make a Payment](#) to pay the balance online or click [View your Bill](#) to see the breakdown of the bill or the print the statement.
- b. *Previous Portal Payments*: Displays previous payments made through the *Patient Portal*. Click **View previous payments** to see additional payments.

The screenshot shows the 'Payments' section of the Tebra Patient Portal. It features two main panels: 'Current Balances' and 'Previous Portal Payments'. The 'Current Balances' panel shows a balance for 'A Place for Healing' of \$125.00, with a 'Make a Payment' button and a 'View your Bill' button. A red bracket labeled 'a' groups these elements. The 'Previous Portal Payments' panel shows a list of three payments: 10/30/2023 (\$25.00), 06/02/2023 (\$50.00), and 02/20/2023 (\$125.00), all for 'A Place for Healing'. A red bracket labeled 'b' groups these elements. The page footer includes '2023 Tebra, Inc. - Terms of Service - Privacy Policy'.

View Bill

After clicking **View Your Bill** from the [Payments](#) page, the patient can review their bill details.

- a. *Print Statement:* Click to print the details of the page.
- b. Review the breakdown:
 - Click **View Details** to display which code(s) was billed for the specific visit and the breakdown of applicable insurance payments and adjustments.
 - Review total insurance payment, patient payment, and adjustments.
- c. *Payment:* Review the patient balance. Click **Pay this amount** at the top of the page or **Pay Now** at the bottom of the page to [make a payment](#).

tebra | Patient Portal | Dashboard | Health Records | Documents | Messages | Payments | Itemized Receipt | Shirley Bishop

A Place for Healing

Questions about your bill? Call **A Place for Healing**

Your Bill Details

Your total responsibility is **\$125.00** a — **Print Statement**

Pay this amount →

Here's the breakdown

What was charged	\$150.00
Your visit on 10/23/2023 - Hide Details	
Your Doctor for this visit: Diana Hudson	
Office Or Other Outpatient Visit For The Evaluation And Management Of A New Patient, Which Requires A Medically Appropriate History And/Or Examination And Straightforward Medical Decision Making, When Using Total Time On The Date Of The Encounter, 15 Minutes Must Be Met Or Exceeded.	
Your total responsibility for this visit	\$150.00
What insurance has paid	\$0.00
What you've already paid	-\$25.00
What was adjusted	\$0.00
What you owe	\$25.00

Pay Now — c ← Back

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Make Payment

After clicking **Make a Payment** from the [Payments](#) page, the patient can make a payment online to pay their balance. This feature is available for patients when the practice has [Tebra Payments](#) or [Patient Collect \(Stripe\)](#) activated.

- For [Patient Collect \(Stripe\)](#) activated practices, review [Patient Experience: Patient Portal Payment \(Stripe\)](#) for more details.
- For [Tebra Payments](#) activated practices, review the following steps.
 - The patient clicks to select the payment amount to pay.

Note: The patient can click **I want to see my statement before I pay** to view their statement first.

 - The patient selects "Pay full Amount" to pay the total amount owed.
 - The patient selects "Pay other amount" to enter a different payment amount.
 - The patient enters the *Card Number*, *Expiration Date*, and *CVV* code.

Note: If any of the card information needs to be corrected after it was entered, all card information fields will automatically clear for security purposes.
 - The patient clicks **Process Transaction** to charge the card. The *Payment Successful* page opens with a receipt and the option to print.

tebra | Patient Portal | Dashboard | Health Records | Documents | Messages | Payments | Itemized Receipt | Shirley Bishop

A Place for Healing Bill - \$125.00

Make a Payment

Choose payment amount

☒ Pay full Amount (\$125.00)

☐ Pay other amount

[I want to see my statement before I pay ->](#)

Enter a card

* Card Number:

* Expiration: Month Year

* CVV:

Process Transaction

Important: It may take up to 15 minutes for your provider to receive the transaction. Please do not retry processing the transaction after clicking "Process Transaction" once. Multiple attempts may result in multiple charges to your account.

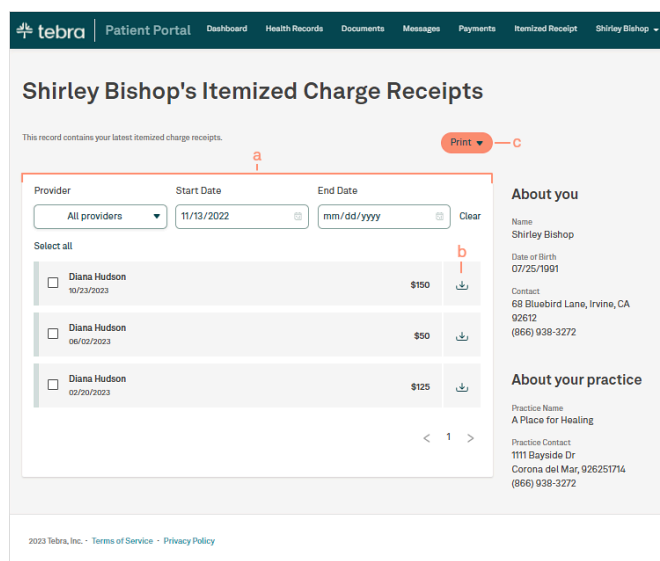
Payments are made safely and securely. HITRUST VERACODE

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Navigate Itemized Charge Receipt

After clicking **View Receipts** from the [Dashboard](#), the patient can review their itemized receipts. The practice must enable the [Receipt on Patient Portal setting](#), for patients to access this section.

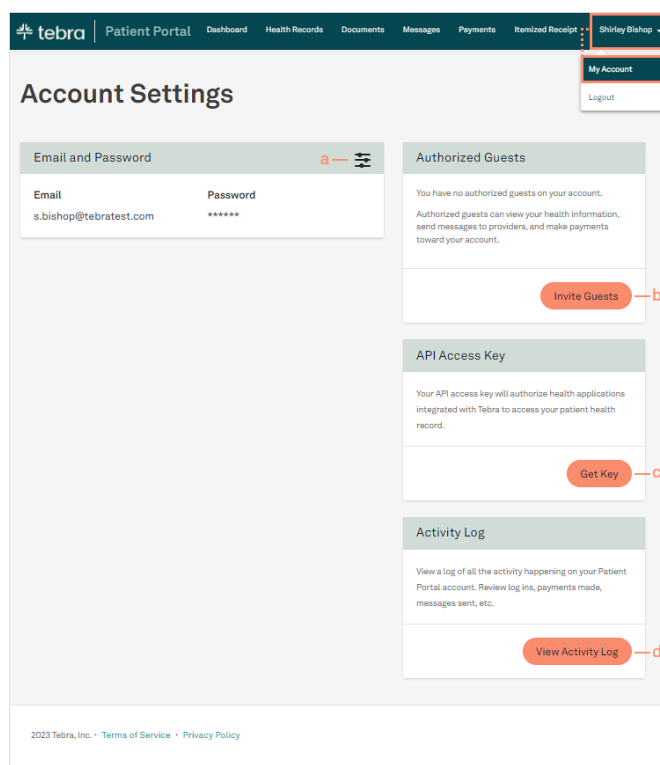
- Filter:** By default, all receipts from the last year to current date displays. To change the filters, click the *Provider*, *Start Date*, or *End Date* drop-down.
 - To reset the filters, click **Clear filters**.
- Download:** Click the **download** icon on a visit to save a PDF of the itemized receipt.
- Print:** Generate a PDF for multiple visits or all visits. Click to select specific visits and click **Select all**. Then, click to expand the *Print* options and select *Separate receipts* to generate a PDF for each visit or select *Combine all visits in a single receipt* to generate a PDF of all visits on one receipt, when applicable.
Note: Only visits for the same practice and service location can be combined in a single receipt.



Navigate My Account

Grant access to an authorized user to view the patient's account or change the password. The only settings the patient can update is their password.

- Account Settings:** Displays the email address associated to the account. Click the **settings** icon to reset the password.
- Authorized Guests:** Click **Invite Guests** to allow authorized users to view the patient's health information, send messages, and make payments. To deny access to an authorized guest, click **Revoke** next to the guest's name.
Note: Authorized users do not have access to the *Account Settings* or *Authorized Guests* sections.
- API Access Key:** Click **Get Key** to generate the API access key that authorizes health applications to integrate with Tebra to access the patient's health record. To deny the generated API key, click **Revoke**. Then, click **Revoke Access** on the confirmation pop-up window.
- Activity Log:** Click **View Activity Log** to review log

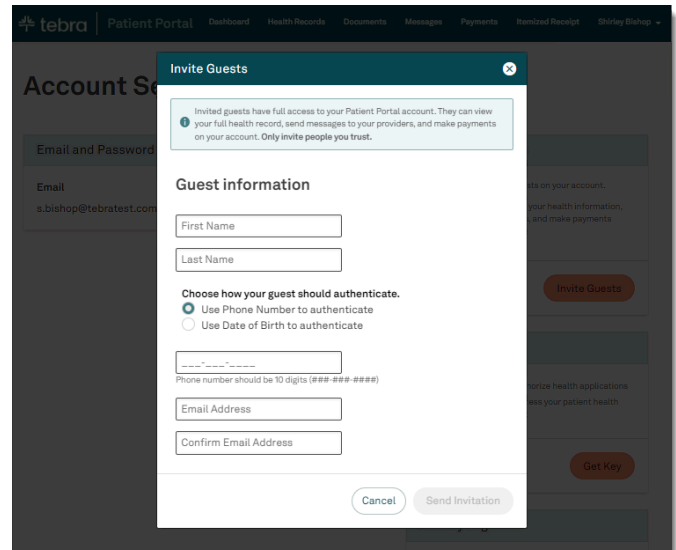


ins, payments made, messages sent, and more.

Invite Guests

From the [My Account](#) page, patients can invite other users (e.g., family members) to view their health information, send messages, and make online payments.

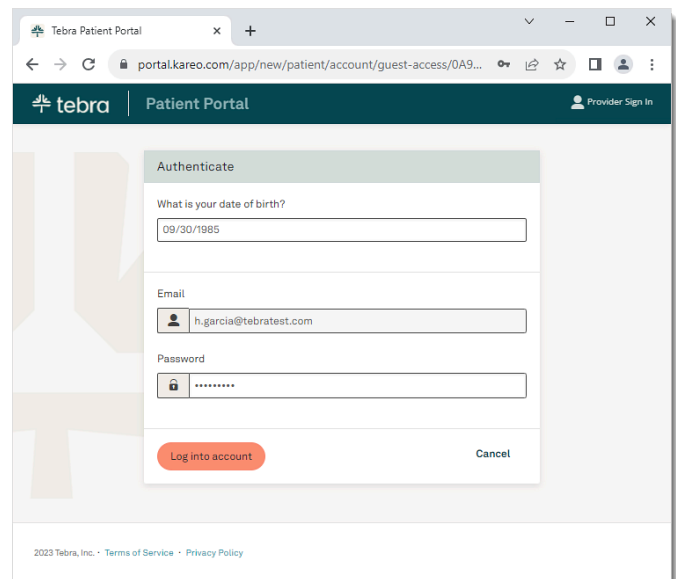
1. Click **Invite Guests**. The *Invite Guest* pop-up window opens.
2. Enter the *Guest First and Last Name*.
3. Select how the guest authenticates.
4. Enter the *Guest Phone Number* or *Date of Birth* and *Email Address*.
5. Click **Send Invitation**. The confirmation pop-up window opens and an email invitation is sent to the invited guest.
6. Continue to add additional guests or click **I'm done** to close the pop-window.

The screenshot shows the 'Invite Guests' pop-up window in the Tebra Patient Portal. At the top, a teal header bar contains the Tebra logo and navigation links: Patient Portal, Dashboard, Health Records, Documents, Messages, Payments, Requested Receipt, and Sharing Setup. Below the header, a teal box with a white 'x' icon in the top right corner contains the title 'Invite Guests' and a warning: 'Invited guests have full access to your Patient Portal account. They can view your full health record, send messages to your providers, and make payments on your account. Only invite people you trust.' The main form area is titled 'Guest information' and includes fields for 'First Name', 'Last Name', and 'Email Address'. Below these, there are two radio buttons for authentication: 'Use Phone Number to authenticate' (selected) and 'Use Date of Birth to authenticate'. A placeholder for a phone number is shown as '____-____-____' with a note 'Phone number should be 10 digits (###-###-####)'. There is also a 'Confirm Email Address' field. At the bottom right of the form are 'Cancel' and 'Send Invitation' buttons.

Invited Guest: Authenticate and Access Account

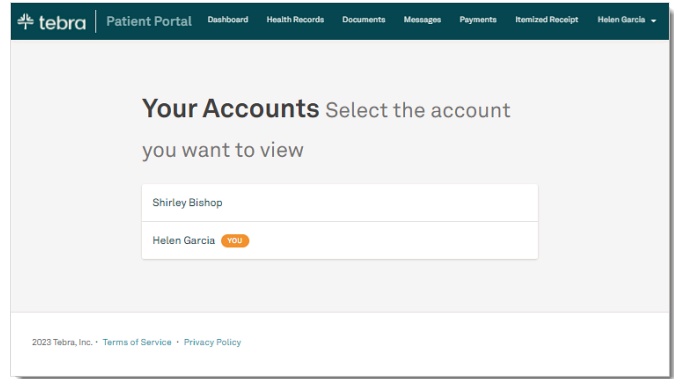
After the [guest is invited](#) to the Patient Portal, they will need authenticate their information to access the patient's account.

1. The guest receives an email invitation and click **Get Started**. The *Authenticate* page opens in a new browser.
2. The guest enters their phone number or date of birth for authentication and clicks **Log into account**. The *Your Accounts* page opens.
 - If the guest does not have a *Patient Portal* account, create a password. Then, click **Create Account**. The *Your Accounts* page opens.

The screenshot shows the 'Authenticate' page in the Tebra Patient Portal. The browser address bar shows 'portal.kareo.com/app/new/patient/account/guest-access/OA9...'. The page has a teal header bar with the Tebra logo, 'Patient Portal', and a 'Provider Sign In' link. The main content area is titled 'Authenticate' and contains a form with the following fields: 'What is your date of birth?' (with the value '09/30/1985'), 'Email' (with the value 'h.garcia@tebratest.com'), and 'Password' (with masked characters '*****'). At the bottom of the form are 'Log into account' and 'Cancel' buttons. The footer of the page includes the text '2023 Tebra, Inc. · Terms of Service · Privacy Policy'.

3. Select an account to view.

- If the guest has not been [invited to the Patient Portal](#) by a provider or practice, their name will not display on the list.



Invited Guest: Switch Users

After an invited guest logs in, they can view their own health information and switch to another patient's account, when applicable.

Note: If the guest has not been [invited to the Patient Portal](#) by a provider or practice, they will not have access to the options below.

- Click the **drop-down** to select a user.
- Click **Back to my account** to view their health information.
- Click **Patient Name** and select **Switch Users**. The **Your Accounts** page opens to select a different account.

