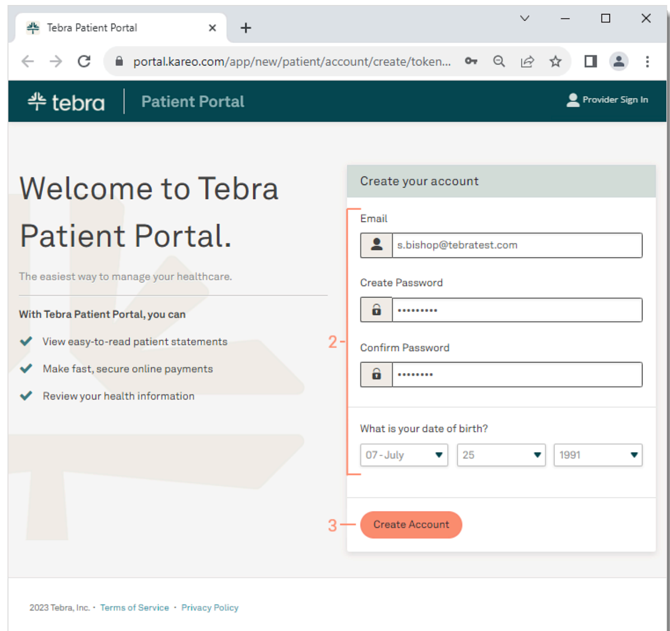
Patient Experience: Patient Portal

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.

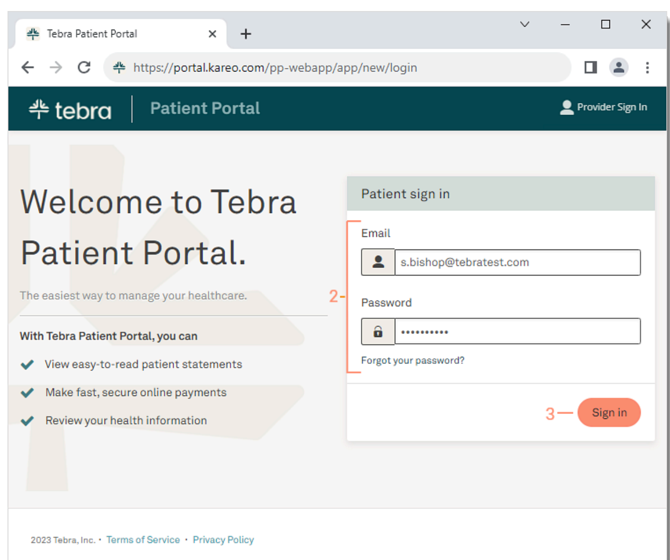
1. In the email invitation, the patient clicks **Get Started**. The *Patient Portal* create account page opens.
2. The patient creates a *Password* and enters their *Date of Birth*.
   Note: The *Email* auto-populates from the email invitation.
3. Patient clicks **Create Account**. The account is created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



Access Patient Portal

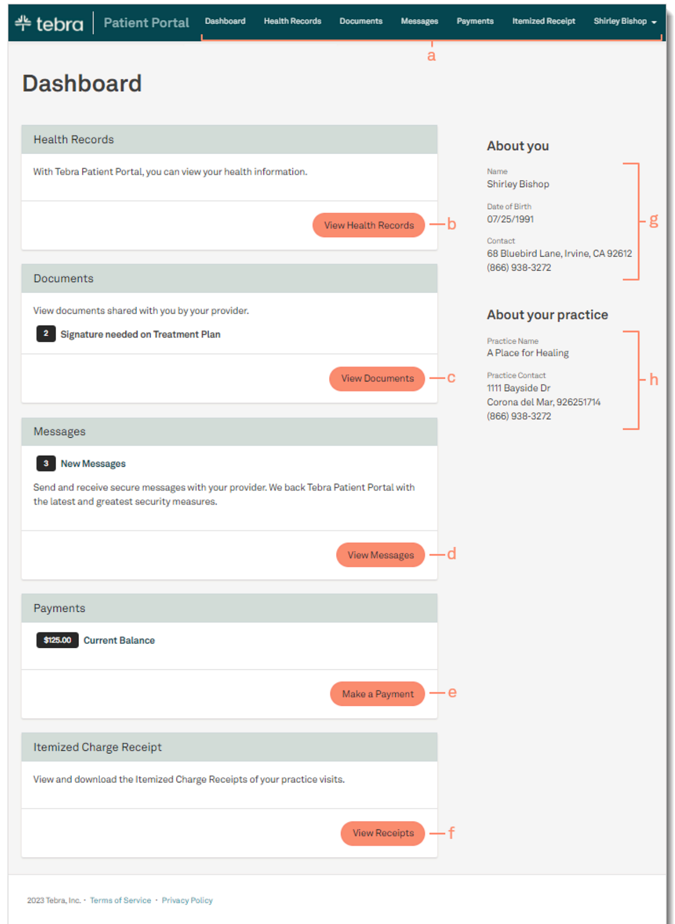
After the account is activated, patients can log into the *Patient Portal* anytime through their mobile device or computer.

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.

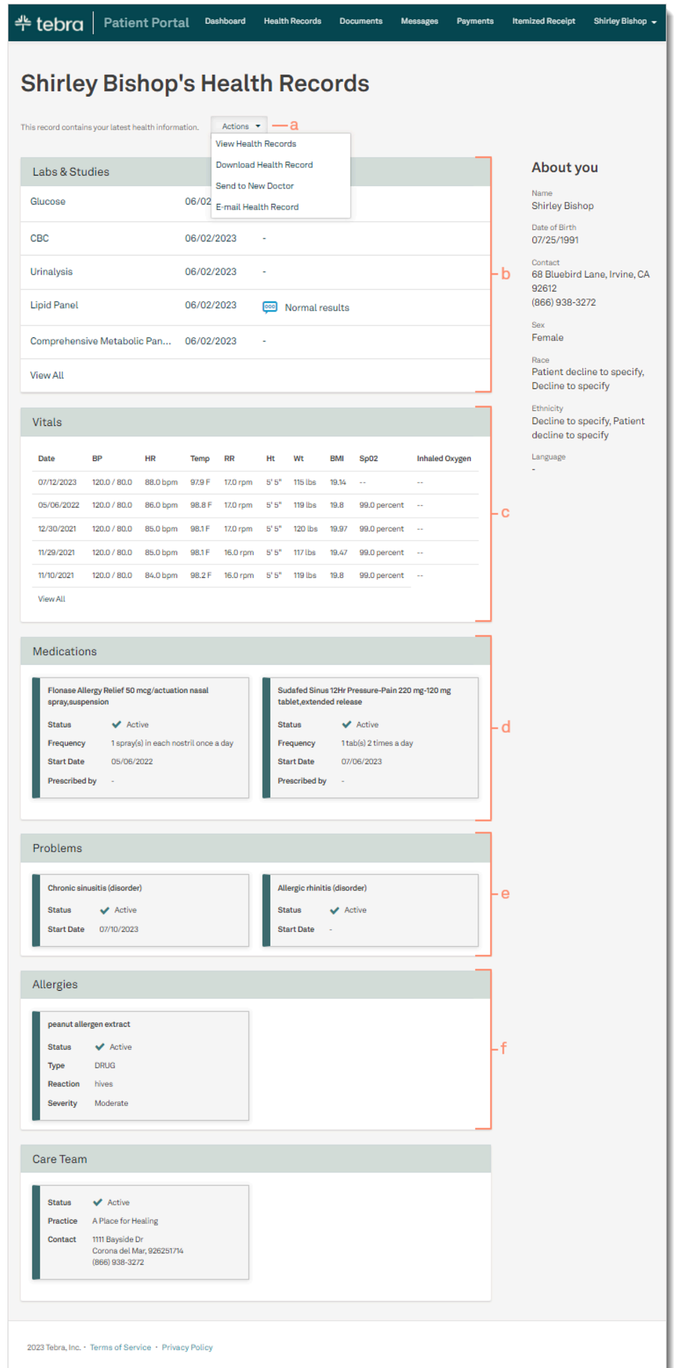
g. *About you:* Patient details on file with the practice.

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.

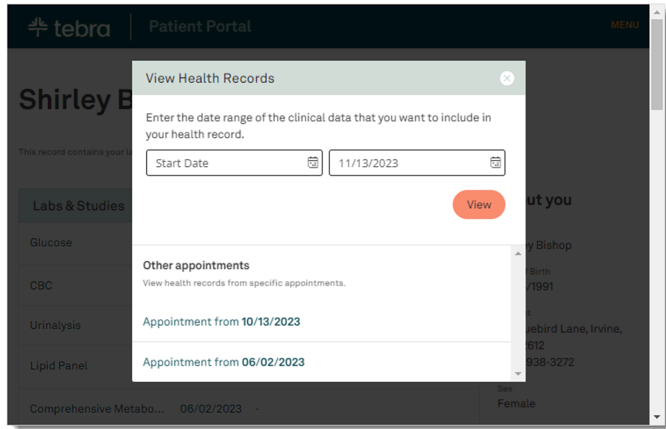
a. *Actions:* Click to view, download, send by direct message, or email the summary of care.
b. *Labs & Studies:* Displays recent eLab orders and applicable notes.
    - Click **View All** to display all labs.
    - Click on the lab to view results and provider comments.
c. *Vitals:* Displays recorded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



View Health Record

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

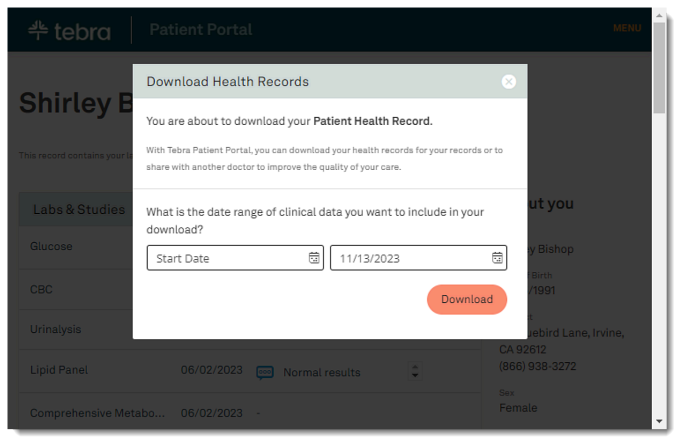
1. Click **Action** and select *View Health Record*. The *View Health Records* pop-up window opens.
2. View all health records or by specific appointments:
   - To view all health records, select the date range. Then, click **View**. The summary of care opens in a new browser.
   - To view health records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

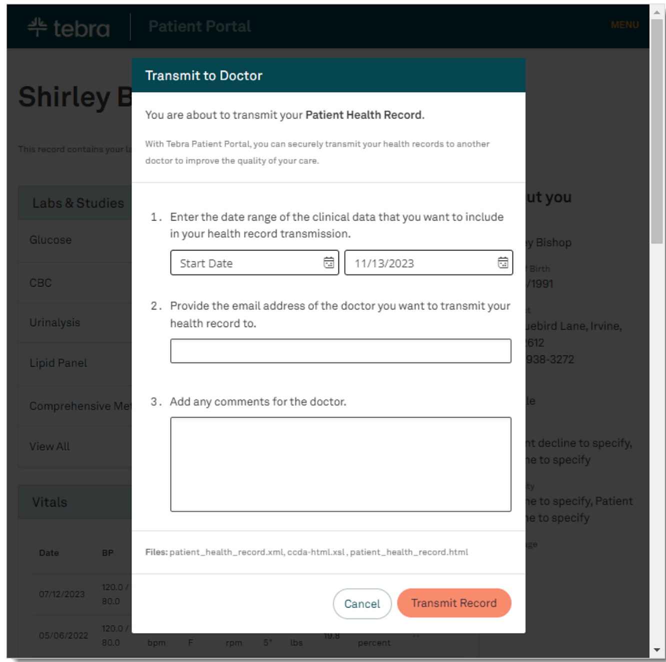
1. Click **Action** and select *Download Health Record*. The *Download Health Records* pop-up window opens.
2. Select the date range.
3. Click **Download**. A zip file is saved containing the XML files.



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.

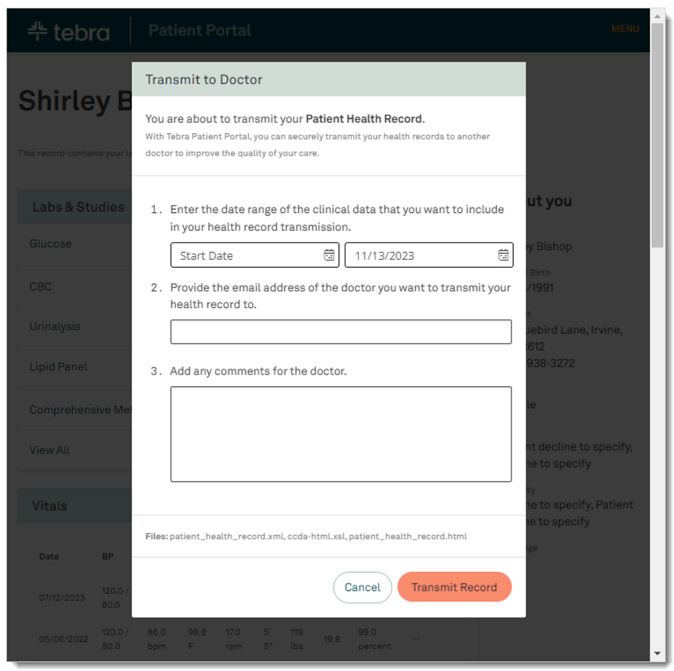
1. Click **Action** and select *Send to New Doctor*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's email address and optionally add comments.
4. Click **Transmit Record** when finished.



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.



Navigate Documents

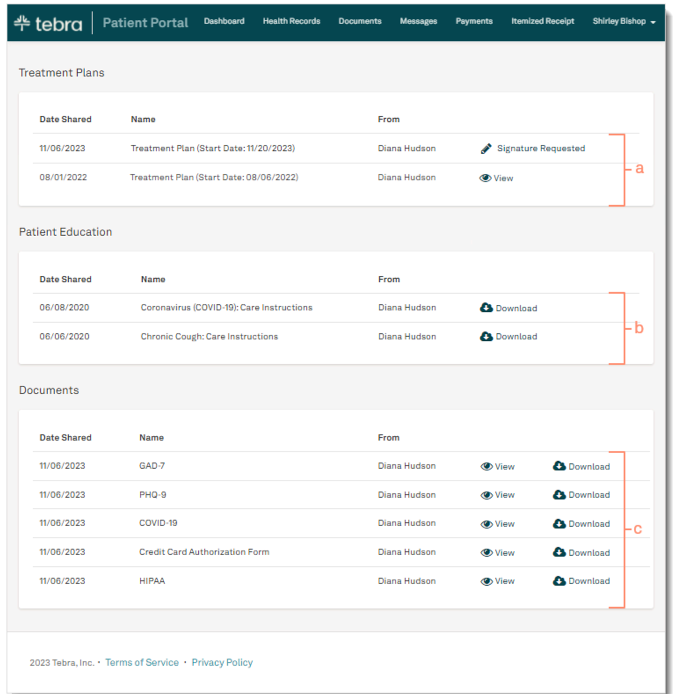
After clicking **View Documents** from the Dashboard, the patient can review documents shared by the practice.

a. *Treatment Plans:* Displays treatment plans that requires a signature by the patient and shared treatment plans. Click to view details and optionally download.

b. *Patient Education:* Displays sent patient educations. Click **Download** to save the file.

c. Documents: Displays sent patient documents.

   - To see the document, click **View**.
   - To save the document, click **Download**.



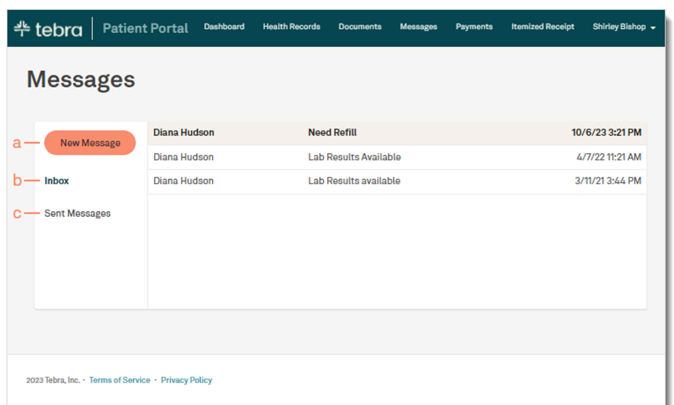
Navigate Messages

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

a. *New Message:* Send new secure message to the provider.

b. *Inbox:* Displays messages sent by the provider.

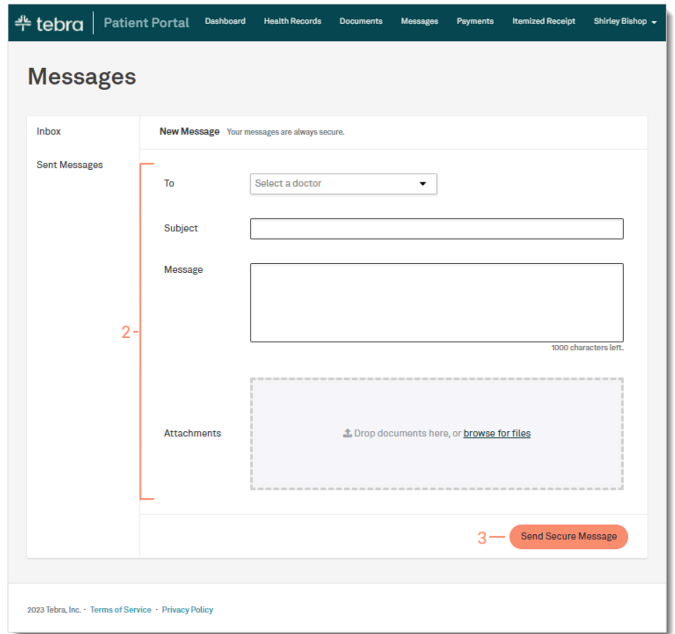
c. *Sent Messages:* Displays message sent to the provider.



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](#).

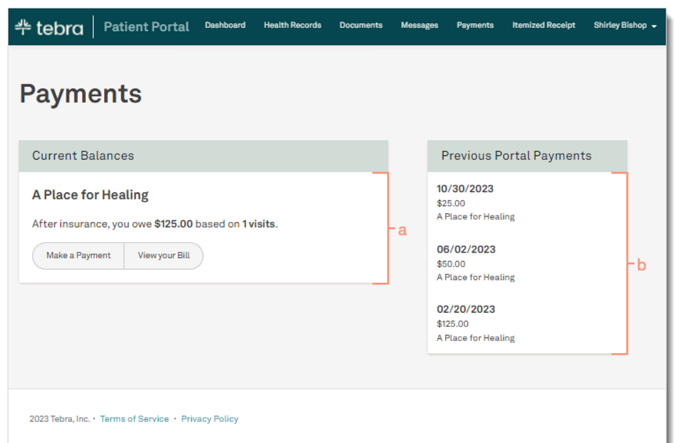


Navigate Payments

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.



View Bill

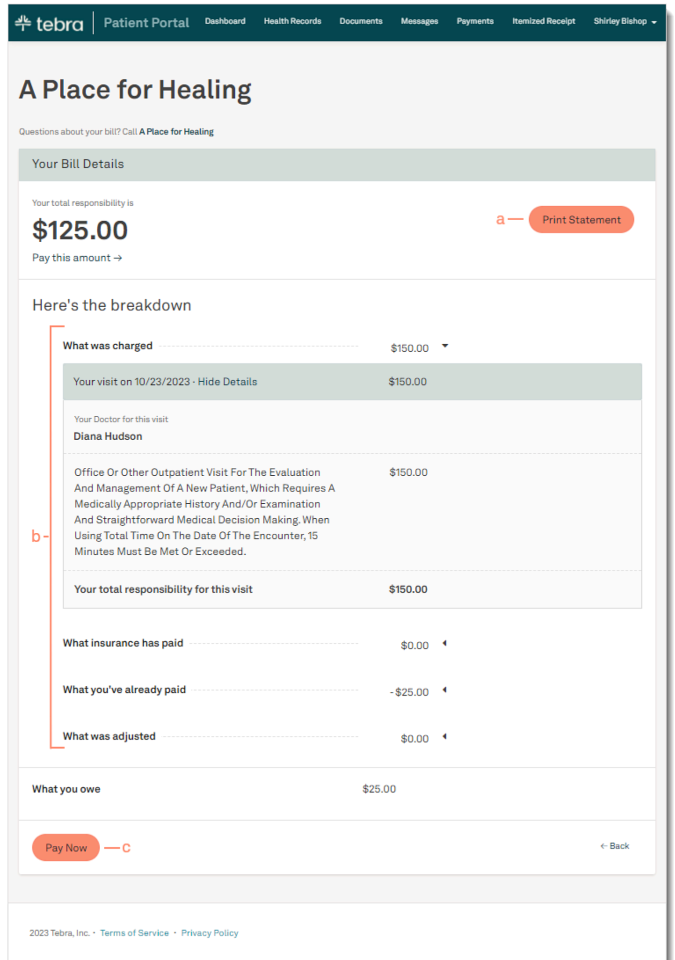
After clicking **View Your Bill** from the [Payments](#) page, the patient can review their bill details.

a. *Print Statement:* Click to print the details of the page.

b. Review the breakdown:

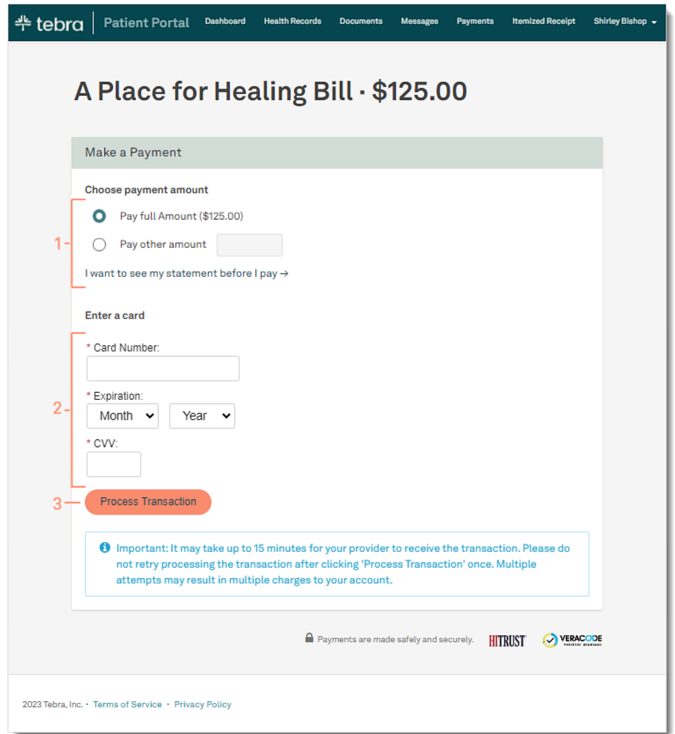
   - Click **View Details** to display which code(s) was billed for the specific visit and the breakdown of applicable insurance payments and adjustments.
   - Review total insurance payment, patient payment, and adjustments.

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](#).



Make Payment

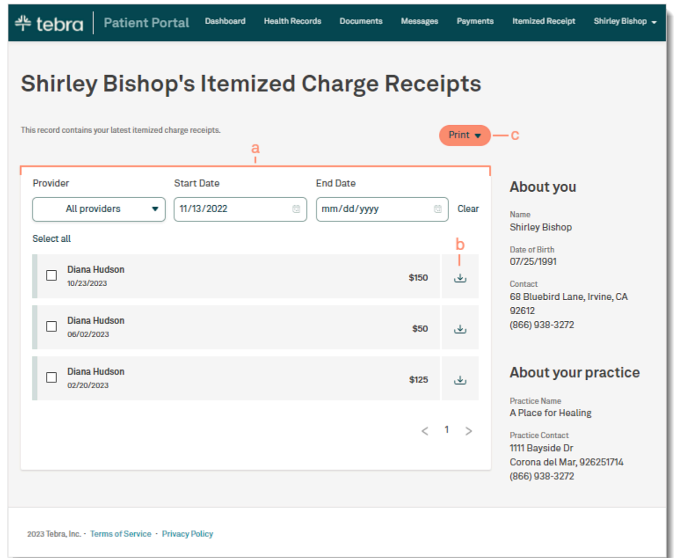
After clicking **Make a Payment** from the Payments page, the patient can make a payment online to pay their balance. This feature is available for patients when the practice has Tebra Payments or Patient Collect (Stripe) activated.



- 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.
  1. 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.
  2. 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.
  3. The patient clicks **Process Transaction** to charge the card. The *Payment Successful* page opens with a receipt and the option to print.

Navigate Itemized Charge Receipt

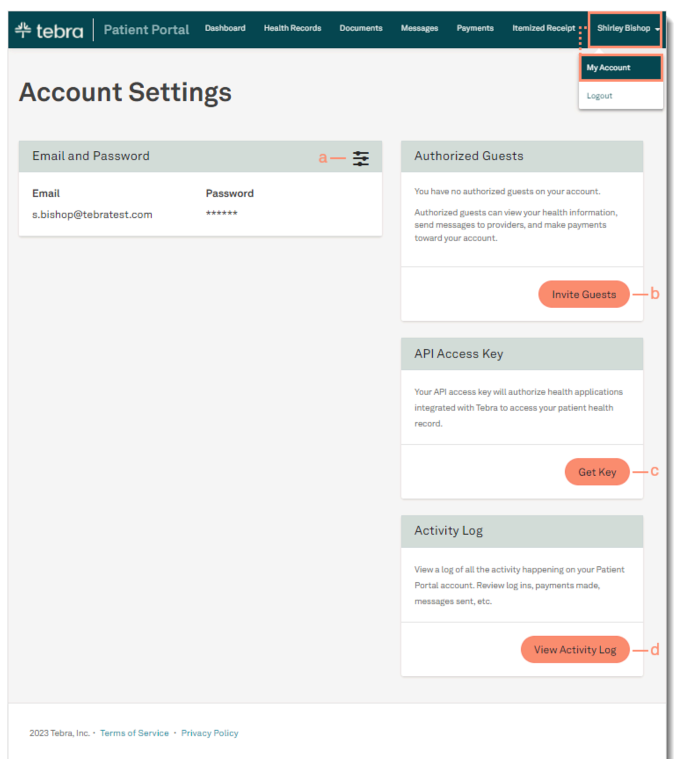
After clicking **View Receipts** from the Dashboard, the patient can review their itemized receipts. The practice must enable the Receipt on Patient Portal setting, for patients to access this section.



a. *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**.
b. *Download:* Click the **download** icon on a visit to save a PDF of the itemized receipt.
c. *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.

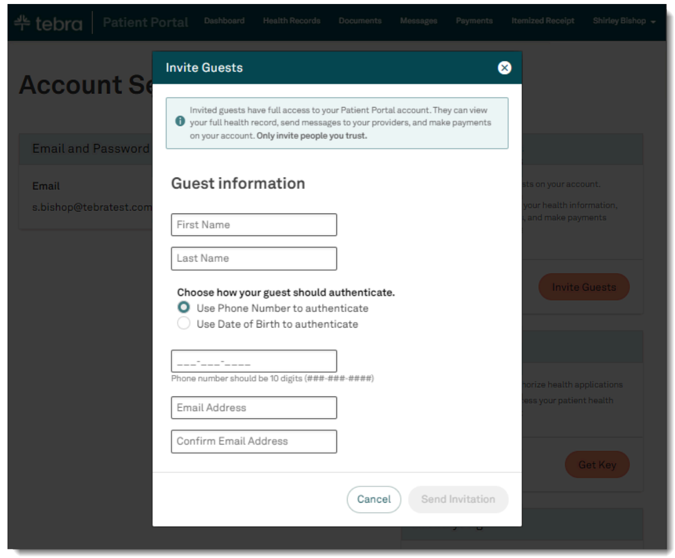


a. *Account Settings:* Displays the email address associated to the account. Click the **settings** icon to reset the password.
b. *Authorized Guests:* Click **Invite Guests** to allow authorized users to view the patient's health information, send messages, and make payments. To deny access to an authorized guest, click **Revoke** next to the guest's name.
   Note: Authorized users do not have access to the *Account Settings* or *Authorized Guests* sections.
c. *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.
d. *Activity Log:* Click **View Activity Log** to review log

ins, payments made, messages sent, and more.

Invite Guests

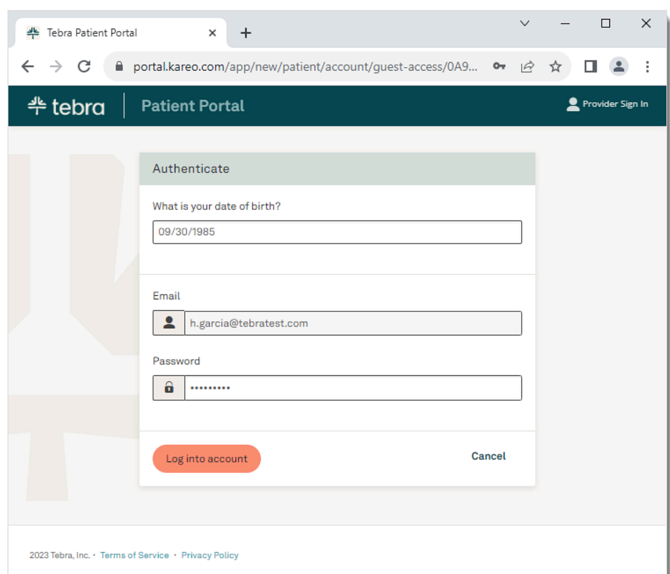
From the [My Account](#) page, patients can invite other users (e.g., family members) to view their health information, send messages, and make online payments.



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.

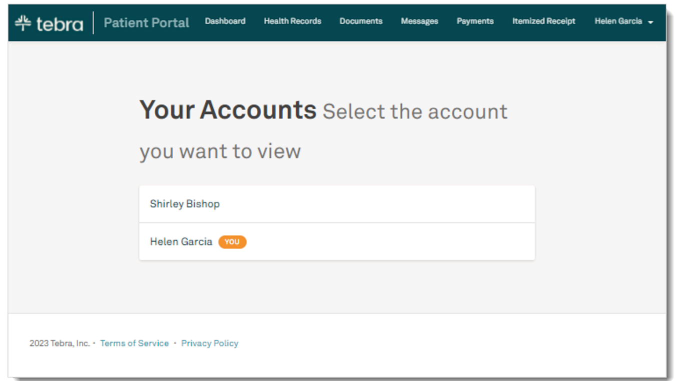
Invited Guest: Authenticate and Access Account

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.

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.

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