

Using the Patient Portal

Overview

Introduction

The IOD Patient Portal allows you download medical records you requested from an IOD contracted facility, as well as submit requests for your medical records electronically. This document provides information and instructions for using the Patient Portal.

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Setting Up Your Patient Portal Account

Patient Portal Requirements

To set up and use a Patient Portal account your computer you must have an active e-mail account and your computer must have one of the following web browsers:

- Internet Explorer (PC's)
- Google Chrome
- Safari (MAC's)

Two Ways of Creating a Patient Portal Account

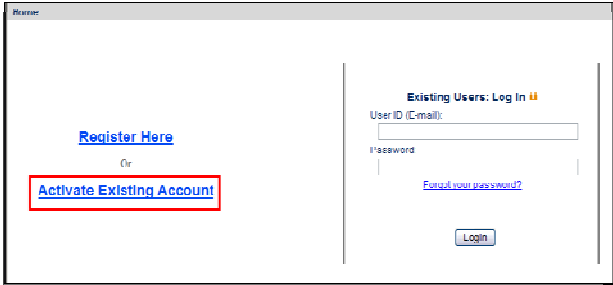
There are two ways a Patient Portal account can be created. The table below provides a description of each method.

Creation Method	Description
Account created by Health Information Management (HIM) Staff	The facility's HIM staff can create a Patient Portal account when you request the medical records. When the account is created you will receive an e-mail to confirm the account creation and provide you with instructions for activating your account.
Self Creation	From the home page of the Patient Portal you are provided the option of creating your own account.

Note: You can only have one Patient Portal account per e-mail address.

How to Activate an Existing Account

When the facility's HIM staff creates your Patient Portal account you will receive an e-mail confirming the creation of the account. However, you will need to activate the account before you can retrieve the medical records you requested. Follow the steps in the table below to activate your account.

Step	Action
1	<p>Click on the link to the Patient Portal provided in the confirmation e-mail. The Patient Portal should open in your default web browser.</p> <p>Note: If the link does not work in the e-mail, right click on the link and select Copy Hyperlink. Then open your web browser and paste the link into the address bar.</p>
2	<p>On the Patient Portal homepage, click Activate Existing Account.</p>  <p>The screenshot shows a web browser window with the Patient Portal homepage. On the left side, there are two blue links: 'Register Here' and 'Activate Existing Account'. The 'Activate Existing Account' link is highlighted with a red rectangular box. On the right side, there is a login section titled 'Existing Users: Log In' with fields for 'User ID (Email):' and 'Password:', and a 'Login' button. A link 'Forgot your password?' is also visible below the password field.</p>

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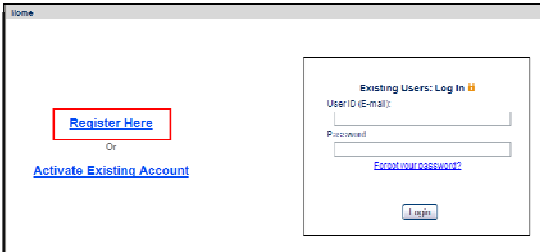
Setting Up Your Patient Portal Account, Continued

How to Activate an Existing Account (continued)

Step	Action
3	On the Activate Account screen enter your User ID which is your e-mail address. Note: You must enter the e-mail address to which the confirmation e-mail was sent.
4	In the Activation Code field enter the activation code provided in the confirmation e-mail. The code must be entered exactly as it appears in the e-mail and it is case sensitive. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>To activate your account, use the following instructions:</p> <ul style="list-style-type: none"> • Go to your Patient Portal site: https://prismuat.ioidincorporated.com/portalsites • Click the Activate Existing Account link • Please, complete all fields in the Activation Account page • Your Activation Code is: qy1sJFKhEINLidRCzriKUVejq • When all the fields are completed, please click the Save button to activate your account </div> <p>TIP! To avoid typos when entering this code, copy the code in the e-mail and paste it in the field on in the Patient Portal.</p>
5	Enter your Zip Code in the User Zip Code field.
6	Create your password in the New Password field and retype the password in the Confirm Password field. Make sure your password meets all of the requirements described on the right hand side of the screen.
7	Click Save . A message will appear to confirm that your account has been activated.

How to Create a Patient Portal Account

If an account has not been created by the HIM Staff and you have access to the facility's Patient Portal website, you have the option of registering and creating your Patient Portal account. Follow the steps in the table below to create your account.

Step	Action
1	On the Patient Portal home screen click the Register Here link. 
2	On the Create New Account screen enter your name and address in the Account Information fields.

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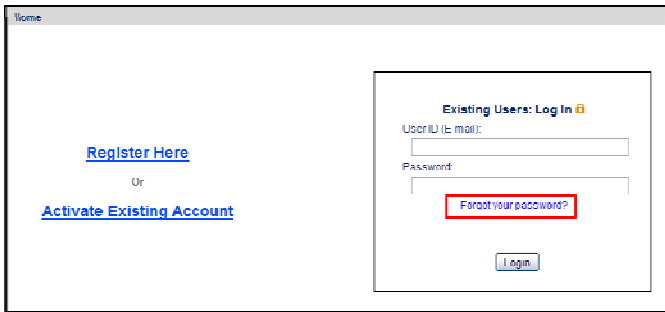
Setting Up Your Patient Portal Account, Continued

How to Create a Patient Portal Account (continued)

Step	Action
3	Enter the e-mail address you would like the Patient Portal to send notifications to in the E-Mail and Confirm E-Mail fields. Your e-mail address will be your User ID for logging in to the Patient Portal.
4	On the lower left hand side of the screen enter the characters that appear in the picture above the field. The letter characters must be entered in the same case as they appear in the picture.
5	Click Verify Your Identity .
6	On the Verify Your Identity screen you will be presented with five personal questions that you must answer to assist us in verifying your identity. You must answer the at least three of the questions correctly to create your account. Once you have answered the questions, click Submit Answers .
7	On the Create User ID and Password screen, create your password in the Enter Password field and retype the password in the Confirm Password field. Make sure your password meets all of the requirements described on the right hand side of the screen.
8	Click Create User . A message will appear to confirm that your account has been created. You will also receive an e-mail to confirm the creation of your account.

Resetting Your Password

If you do not remember the password you created for your Patient Portal account, you can reset your password on the Patient Portal login screen. Follow the steps in the table below to reset your password.

Step	Action
1	On the Patient Portal login screen click the Forgot your Password? link. 
2	In the Account Information section enter your User ID, which is the e-mail address associated with the account.
3	Enter the characters that appear in the picture above the field. The letter characters must be entered in the same case as they appear in the picture.
4	Click Submit . You will return to the Patient Portal login screen and an e-mail will be sent to you with a password reset code.

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Setting Up Your Patient Portal Account, Continued

Resetting Your Password (continued)

Step	Action
5	When you receive the e-mail click the link to the Patient Portal that was included in the e-mail.
6	Click the <i>Forgot your password?</i> link.
7	Click the <i>Reset Password</i> button located on the top of the screen.
8	In the <i>User Id (E-mail)</i> field enter the e-mail address associated with your Patient Portal account.
9	Enter the Reset Password Code included in the e-mail in the <i>Reset Password Code</i> field. This code must be entered exactly as it appears in the email. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Thank you for using IOD's Secure Patient Portal. Please find your reset password code below</p> <ul style="list-style-type: none"> Your Reset Password Code is: Q5z6HSxrANgP SdcZW7hlpTztK </div>
10	In the <i>User Zip Code</i> field, enter your Zip Code.
10	Create your new password in the <i>New Password</i> field and retype the password in the <i>Confirm Password</i> field.
11	Click <i>Save</i> . A message will appear confirming your new password has been saved.

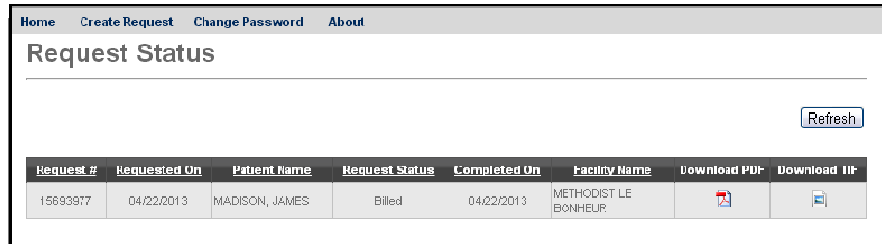
Retrieving Your Records

Overview

This section will provide you with information about checking the status of your request and how to download your medical records.

Request Status Screen

When you log in to the Patient Portal you will be brought to the Request Status screen. On this screen you will be able to check the status of your request for medical records and download your medical records when they are ready.



The table below provides a description of the information displayed on this screen.

Column	Description								
Request #	The identification number for your request. When calling to inquire about your request, please refer to this number.								
Requested On	The date your request was received at the facility.								
Patient Name	Name of the patient whose medical records will be released.								
Status	<p>The status of your request. The table below provides a description of the various statuses you may see while your request is being processed.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Entered</td> <td>Your request has been received at the facility and is being processed.</td> </tr> <tr> <td>Hold</td> <td>There is a delay in releasing your records. If you have not received any communication from the facility regarding this delay, please contact IOD's Customer Service at 800-236-3355.</td> </tr> <tr> <td>Billed or Paid</td> <td>Your request has been completed and the records have been sent to the Patient Portal.</td> </tr> </tbody> </table>	Status	Description	Entered	Your request has been received at the facility and is being processed.	Hold	There is a delay in releasing your records. If you have not received any communication from the facility regarding this delay, please contact IOD's Customer Service at 800-236-3355.	Billed or Paid	Your request has been completed and the records have been sent to the Patient Portal.
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Billed or Paid	Your request has been completed and the records have been sent to the Patient Portal.								
Completed On	The date your request was completed at the facility.								
Facility Name	The name of the facility from which you requested your medical records.								
Download PDF	The medical records you requested in a PDF format. You will need Adobe Reader to view the records.								
Download TIF	The medical records you requested in a TIF format. You will need an image viewer, such as Windows Picture Viewer, to view the records.								

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Retrieving Your Records, Continued

Downloading Your Records

You will receive an e-mail when your request has been completed and your records are ready to download. To download your records, click the link to the Patient Portal that is provided in the e-mail and log in to the Patient Portal. Once you are logged in, click on either the Download PDF icon or the Download TIF icon and follow the instructions on the screen to download the records.

Record Availability

Your medical records will be available for you to download for 30 days. If the records are not accessed within 30 days, IOD will delete the information from the Patient Portal and you will be required to resubmit your request.

Creating a Request in the Patient Portal

Overview

The Patient Portal allows you to create and send a request for medical records electronically to a facility. This section provides instructions for how to create a request for medical records in the Patient Portal.

Requirements

To create a request for medical records in the Patient Portal the following requirements must be met:

- The facility must utilize IOD's Patient Portal
- You have a Patient Portal account.
- You are requesting your own medical records

Note: Some facilities that utilize IOD's Patient Portal may not accept requests for medical records electronically and require a written request and authorization. Before creating your request please contact the facility's HIM Department to make sure they will accept a request through the Patient Portal.

How to Create a Request

Follow the steps in the table below to create a request for medical records in the Patient Portal.

Step	Action
1	Log in to the Patient Portal
2	Click on the Create Request link located on the top of the screen. Result: The Create New Request screen will open.
3	In the Relationship to Patient section, click in the circle next to Self . Note: You can only request your own medical records using the Patient Portal.
4	In the Facility Information section select the state the facility is located and the facility from which you are requesting your records.
5	If you were treated by and are requesting medical records from an affiliate of a facility, such as a clinic or another hospital, select the affiliated facility from the Records Location drop down menu. If you were not treated at an affiliate or you are not sure, leave the field blank.
6	Most of the fields in the Patient Information section have been automatically filled in. However, you are required to enter your Date of Birth .
7	In the Request Details section select the reason for your request on the Purpose of Disclosure drop down menu.
8	Select how you would like the records to be delivered from the Preferred Delivery drop down menu. You have three options, Download, Hold at Facility for Pickup and Mail. If you select mail, please note that the medical records can only be mailed to the address you specified when you created your Patient Portal account.

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Creating a Request in the Patient Portal, Continued

How to Create a Request (continued)

Step	Action
9	Select the type of records you are requesting in the Items Requested section.
10	In the Date Range section select the time period you are requesting or click in the circle next to Specific and enter the specific dates in the From and To fields. If you are not sure of the dates or items you need, click the circle next to Note and enter a note describing the records you need.
11	In the Request Authorization section select any of the federally protected information items you permit to be released with this request. Note: If the records you are requesting includes federally protected information and it is not selected in this section, depending on the facility's policies, this information may be omitted from the records you receive or you may need to resubmit your request in writing.
12	Click the Create New Request button. Your request will be assigned a Request Number and submitted to the facility for processing. You will also receive an e-mail confirming your request.

Patient Portal Troubleshooting Tips

Overview

This section provides some tips to assist you in troubleshooting problems you may have with using the Patient Portal.

Invalid Authorization Code

When you are trying to activate your account and you receive a message that says “Invalid Authorization Code”, you are most likely using a web browser that is not compatible with the Patient Portal. Please make sure you are using one of the following web browsers when you are accessing the Patient Portal.

- Internet Explorer (PC's)
- Google Chrome
- Safari (MAC's)

If you are using the web browsers listed above and are still receiving this message, please contact IOD's Customer Service department at 800-236-3355.

Request is Completed, but the Medical Records are not Available for Download

Once a request is completed, the medical records must be processed before they can be sent to the Patient Portal. This process can take from a couple of hours up to 24 hours. You will receive an e-mail when this process has completed and the records are available on the Patient Portal.

If the medical records are still not available after more than 24 hours from when the request was completed, please contact IOD's Customer Service department at 800-236-3355.
