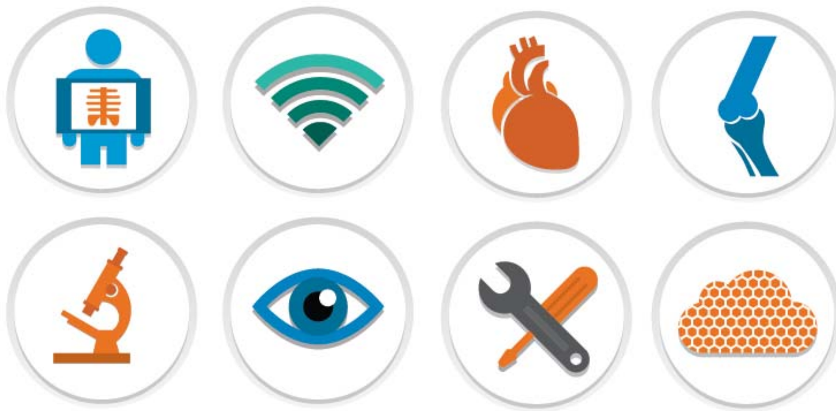
innovative imaging™



My MergePortal

USER'S GUIDE

Merge Healthcare
900 Walnut Ridge Drive,
Hartland, WI 53029
USA

The software that is the subject matter of this document is an advisory device and is not designed or intended to substitute for the skill, knowledge or experience of the users of the software.

For application support, please contact your My MergePortal provider.

Part	Date	Revision	Description
PPTL-326	May 2015	1.0	Initial version

Contents

Chapter 1 Introduction

My MergePortal provides patients with secure web-based access to their health records, including lab results, medications, recorded drug allergies, etc. My MergePortal is typically installed on a database or communication server.

NOTE: If the main Merge RIS Application Server is unavailable, patients will not be able to access My MergePortal.

NOTE: Some of the features described in this guide may not be available in earlier versions of the software.

About this Guide

This section describes various conventions and visual cues that are used throughout this guide.

NOTE: Cross-references that appear in blue text are hyperlinks.

Screen Captures

This guide uses screen captures to help illustrate various steps and procedures. The screen captures are used as examples only and may differ somewhat from what you see on your monitor.

Drive Letter Conventions

When referring to drive letters, we make the assumptions listed below. If your drive letters are different, then use yours instead.

- Hard Drive = C:
- Floppy Drive = A:
- CD Drive = D:

The examples provided throughout this guide assume the application is installed under the default path.

Notes, Cautions, and Warnings

NOTE: Note messages are used to indicate information which may be helpful or of special interest to you.

CAUTION: **Caution messages indicate procedures which, if not observed, could result in a loss of data or damage to the equipment. Do not proceed beyond a CAUTION message until the indicated conditions are fully understood and met.**

WARNING: **Warning messages indicate procedures or practices which, if not observed, could result in personal injury. Do not proceed beyond a WARNING message until all of the indicated conditions are fully understood and met.**

Chapter 2 Using My MergePortal

This section describes the features available to patients in My MergePortal.

Topics covered include:

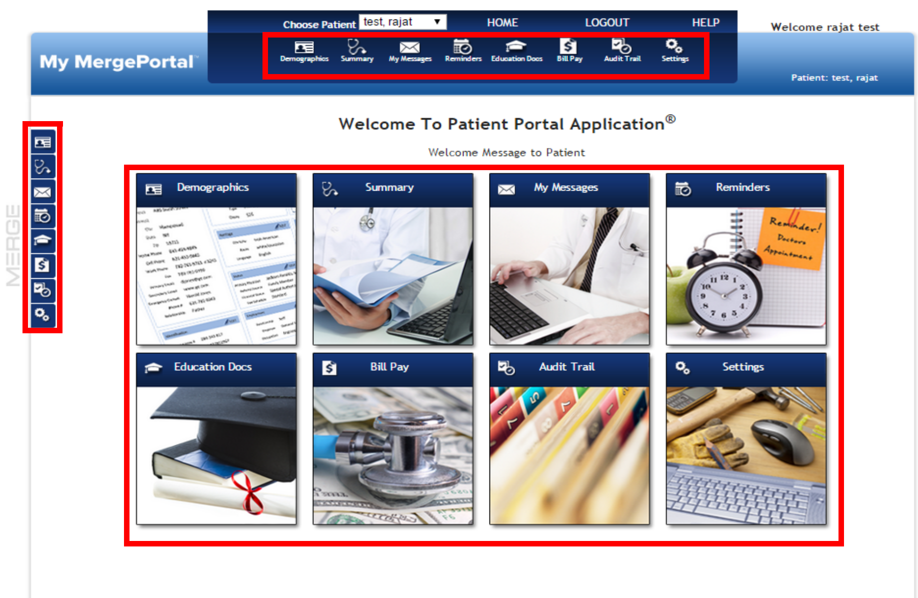
Patient Login

To log in

1. Navigate to the portal address. The Portal Login page opens.

2. Type your **User Name** (email address) and **Password**.

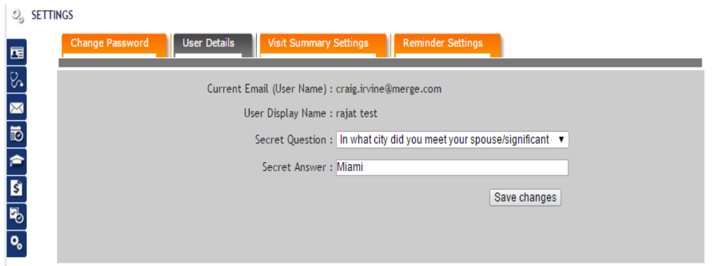
3. Click **Log On**. The portal home page opens.



Each of the staff features can be accessed from three different areas:

- the main icon
- the top menu icon
- the left menu icon

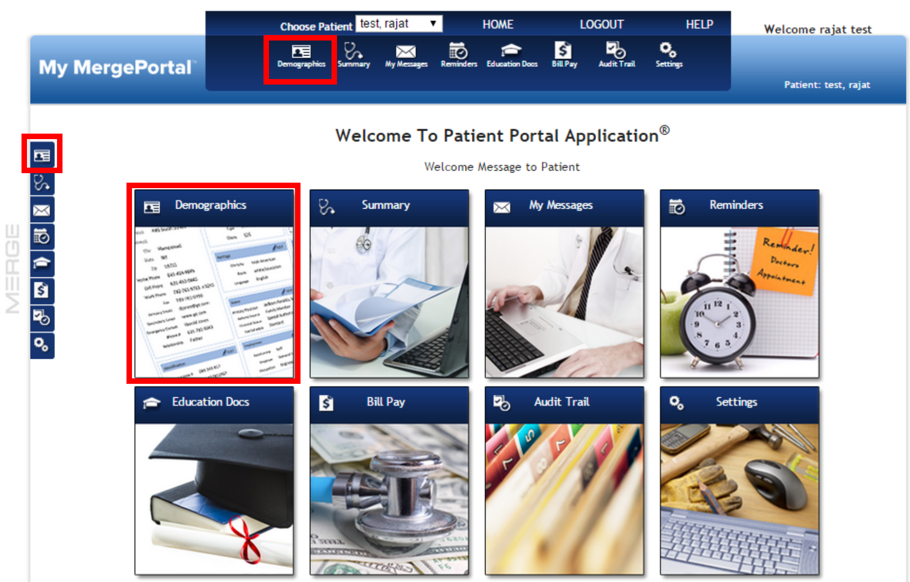
NOTE: The first time you log in, the User Details tab on the Settings page opens.



Select a **Secret Question** from the drop-down list and type an answer in the **Secret Answer** field. Click **Save Changes** and the portal home page opens.

Demographics

The Demographics feature of My MergePortal allows patients and patient authorized representatives to view and edit patient demographics.



From the Demographics feature, users can perform the following:

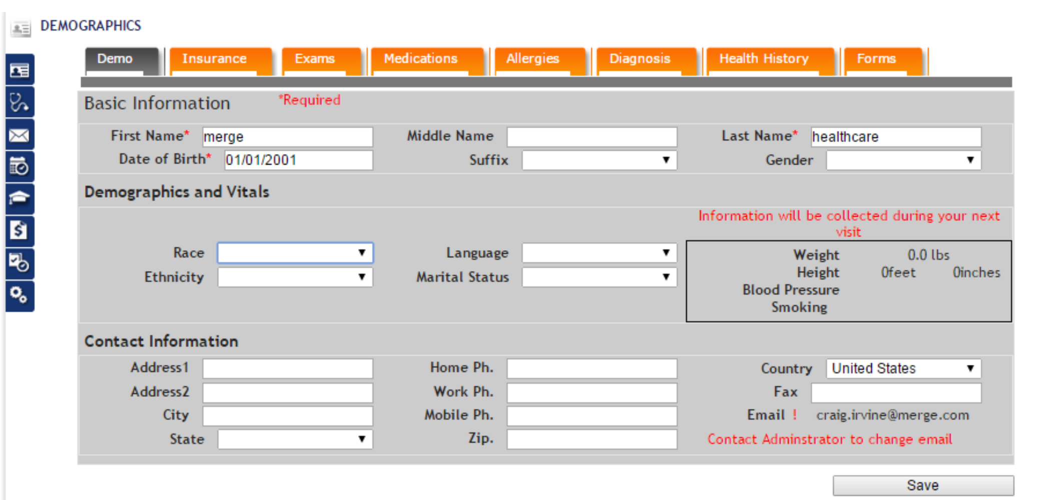
- View and manage patient information such as name and address. See **"Patient Information" on page 10**.
- View and manage insurance plans. See **"Insurance Plans" on page 11**.

- View exams (and view the report of the exam if it is available). See **"Exams" on page 13**.
- View and manage appointments. See **"Appointments" on page 14**.
- View and manage medications, and submit refill requests. See **"Medications" on page 15**.
- View and manage allergies and drug reactions. See **"Allergies" on page 18**.
- View and manage patient conditions. See **"Conditions" on page 20**.
- View and manage patient and family health history details. See **"Health History" on page 21**.
- Download and upload template forms. See **"Forms" on page 23**.

Patient Information

To view and edit patient information

1. Navigate to the Demographics feature. The Demographics tab opens.

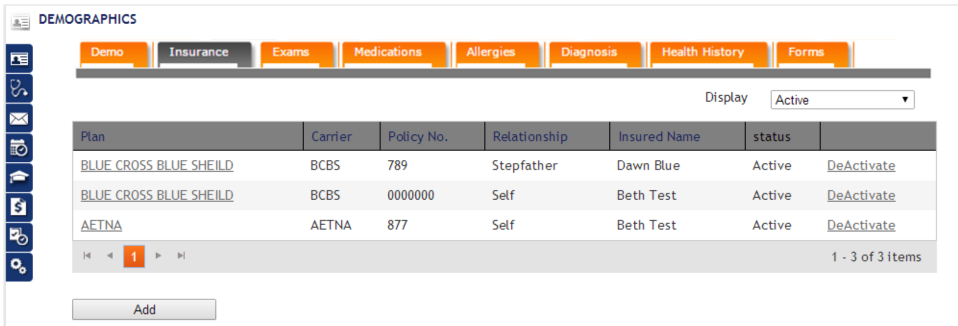


2. View and edit the patient information as required.
3. Click **Save** when finished.

Insurance Plans

To manage insurance plans

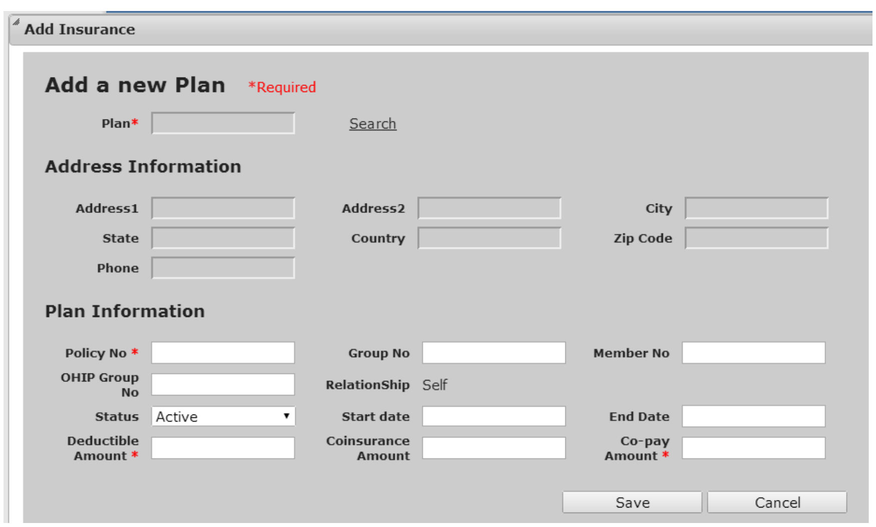
1. Navigate to the Demographics feature and click the **Insurance** tab to view the plans associated with the patient. The Insurance tab opens.



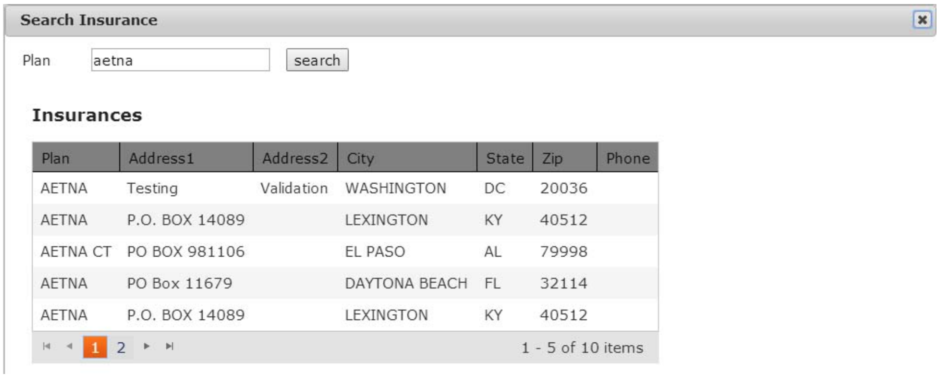
2. Use the **Display** drop-down list to filter the list by **Active**, **Inactive**, or **All** plans associated with this account.

3. Do one of the following:

   - Click **Activate** or **Deactivate** to activate or deactivate a plan for the patient's account.
   - Click the plan link to open an existing plan.
   - Click **Add** to open the Add Insurance page.



4. Click **Search** to search for insurance carriers.


Search Insurance

Plan aetna search

Insurances

Plan	Address1	Address2	City	State	Zip	Phone
AETNA	Testing	Validation	WASHINGTON	DC	20036	
AETNA	P.O. BOX 14089		LEXINGTON	KY	40512	
AETNA CT	PO BOX 981106		EL PASO	AL	79998	
AETNA	PO Box 11679		DAYTONA BEACH	FL	32114	
AETNA	P.O. BOX 14089		LEXINGTON	KY	40512	

1 2 1 - 5 of 10 items

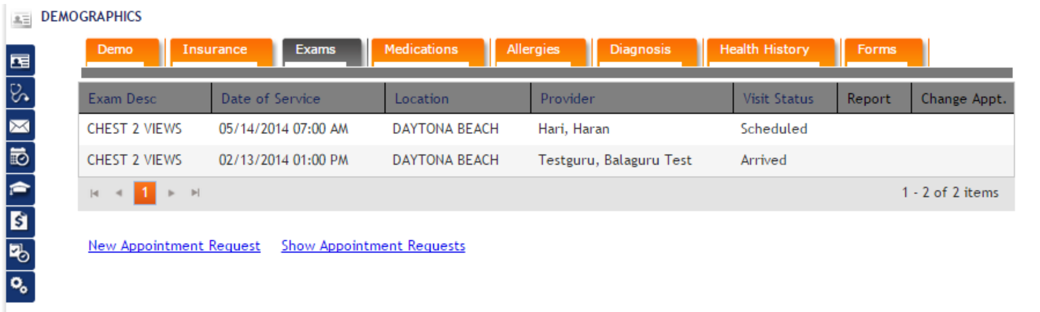
5. Select a plan. You are returned to the Add Insurance page.

6. Enter the details in the Plan Information section (any field with a red asterisk (*) is required). When you are finished, click **Save**.

Exams

To manage patient exams

1. Navigate to the Demographics feature and click the **Exams** tab to view a list of patient exams completed by your practice (as well as any reports that may be associated with those exams). The Exams tab opens.



2. If a report is available for an exam, click **View Report** in the Report column to open the patient’s report for that visit (sample report below).


<<Logo1>>

NAME: ABRAHAM, ABE DATE: 01/15/2013

ID: 156 DOB: 08/27/1930

REFERRING PHYSICIAN: JOHN DOE

234 ANY STREET

DAYTONA BEACH FL
CC PHYSICIAN:

CLINICAL INFORMATION: test report

Office Visit, CT SINUS W CONTRAST , CT ABDOMEN W/O CONTRAST

FINDINGS:

IMPRESSION:

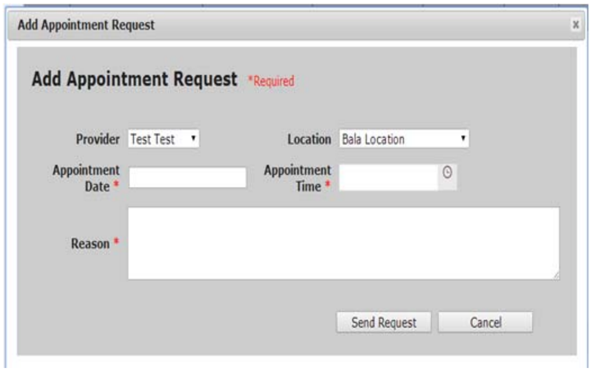
Administrator Administrator

Electronically approved by:
DS
01/15/2013

Appointments

To add a new appointment

1. Click **New Appointment Request**. The Add Appointment Request page opens.

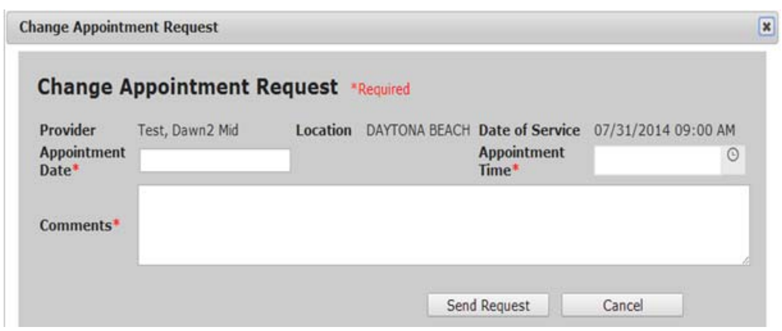


2. Complete the appointment request.

3. Click **Send Request** to send the request to the provider.

To edit an appointment

1. To send a request for an appointment change, the click the corresponding Change Appt icon. The Change Appointment Request dialog opens.



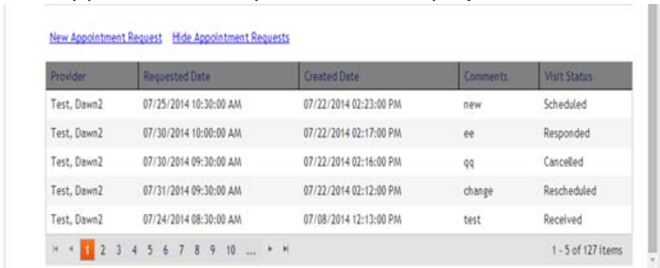
NOTE: The practice decides the time-span of how close to the day of the appointment it can be rescheduled. This icon will only appear next to those appointments that fall within that time period, and are in a Scheduled status.

2. Enter the required information (the desired new appointment date and time, and comments).

3. Click **Send Request**. The request is sent to the provider for this new appointment.

To view appointment requests

1. You can view appointment requests by clicking the **Show Appointment Requests** link. The Appointment Requests list is displayed.

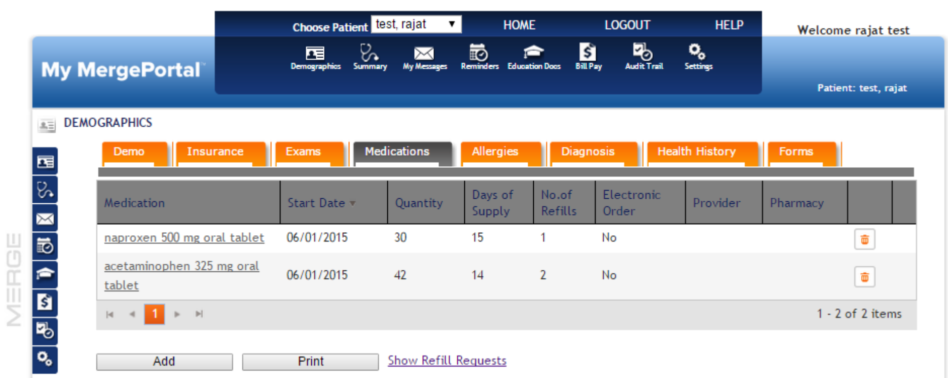


2. Click **Hide Appointment Requests** to hide the list.

Medications

To manage medications

1. Navigate to the Demographics feature and click the Medications tab to display a list of medications, including the Medication Name, Start Date, Quantity, Days Of Supply, Number of Refills, and Electronic Order (Yes/No).

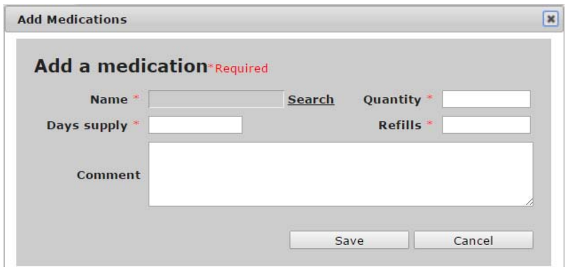


2. Do one of the following:

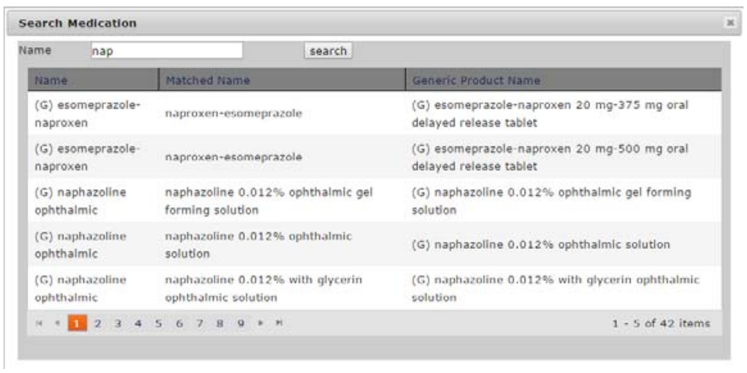
   - Click **Add** to add a medication. See **"To add a medication" on page 16**.
   - Click the name of a medication to edit the medication. See **"To edit a medication" on page 17**.
   - Click **Print** to open a print preview page from which you can print the medications list.
   - Click **Show Refill Requests**. See **"To view and submit refill requests" on page 17**.
   - Click a trash can icon located to the right to remove the corresponding medication.

To add a medication

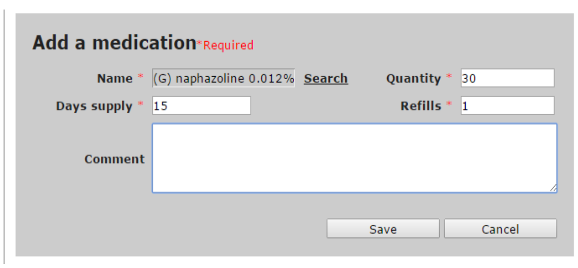
1. In the Medications tab. click **Add**. The Add Medications dialog opens.



2. Click **Search** to search for the medication. The Search Medication dialog opens. Type a search term and click **Search**. A list of matches is displayed.



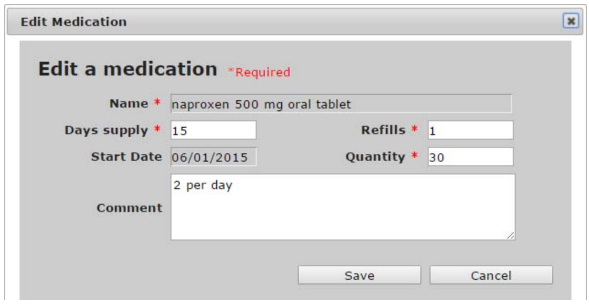
3. Click the medication and then complete the remaining fields in the Add Medication dialog.



4. Click **Save**. The medication is added to the list.

To edit a medication

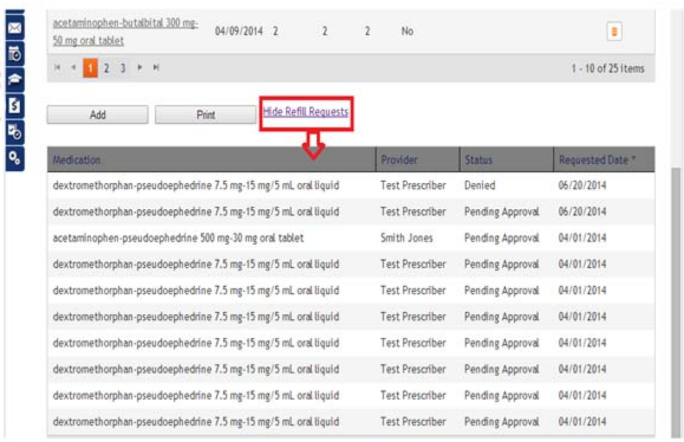
1. In the Medications tab, click the name of the medication that you want to edit. The Edit Medication dialog opens.



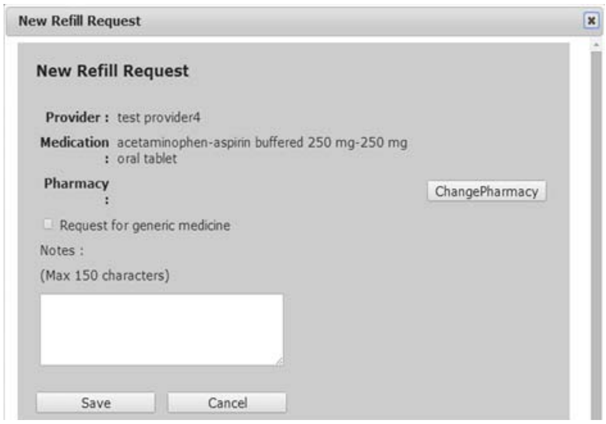
2. Edit the values as required and click **Save**.

To view and submit refill requests

1. In the Medications tab, click **Show Refill Requests**. The Refill Requests are displayed.



2. You can request a refill by clicking . The New Refill Request page opens.



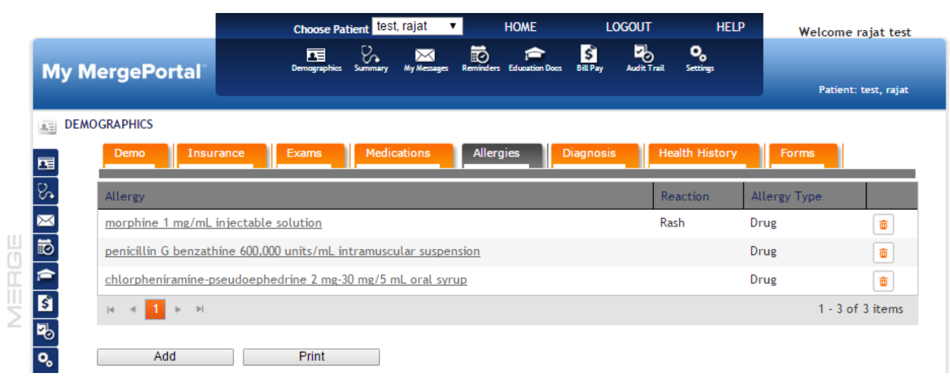
3. Optionally change the pharmacy by clicking **Change Pharmacy**. You can then search for and select the pharmacy that you want to use for this refill.

4. Optionally request a generic medicine or enter notes and click **Save**. The refill request is sent to the provider.

Allergies

To view and print a patient's list of allergies

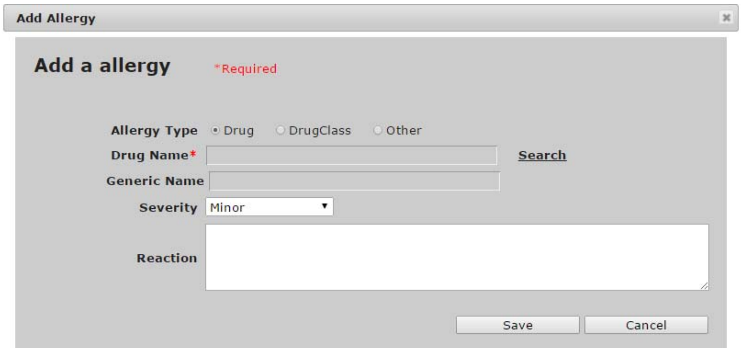
1. Navigate to the Demographics feature and click the **Allergies** tab to display a list of allergies, reactions, and allergy types.



2. Do one of the following:
   - Click **Add** to add a new allergy.
   - Click **Print** to open a print preview page from which you can print the allergies list.
   - Click a trash can icon located to the right to remove the corresponding medication.

To add an allergy

1. In the Allergies tab, click **Add**. The Add Allergy dialog opens.



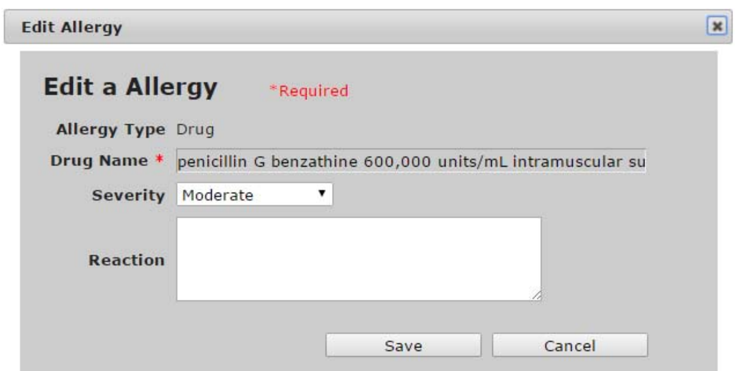
2. Select the **Allergy Type** and then click **Search** to search for the **Drug Name**

3. Select the cause of the allergy from the search results and complete the rest of the fields in the Add Allergy dialog.

4. Click **Save**.

To edit an allergy

1. In the Allergies tab, click the name of the allergy that you want to edit. The Edit an Allergy dialog opens.

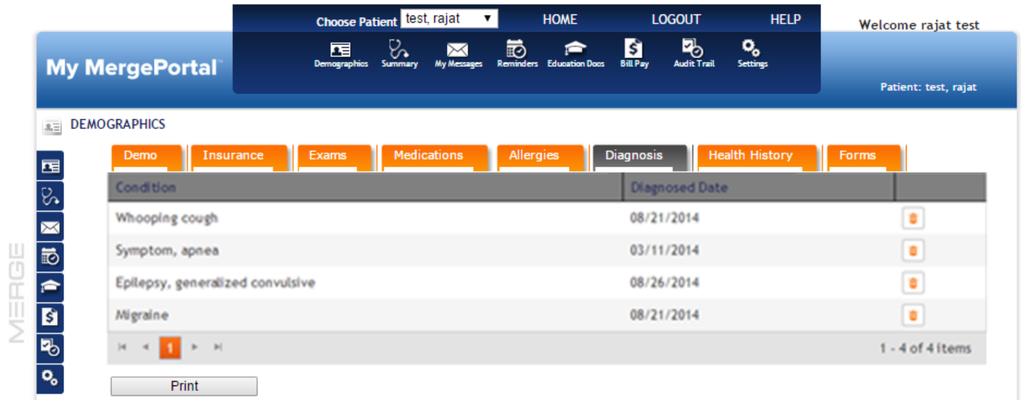


2. Edit the fields as required and click **Save**.

Conditions

To view conditions

1. Navigate to the Demographics feature and click the **Conditions** tab to view a list of patient conditions and the date of the diagnosis.



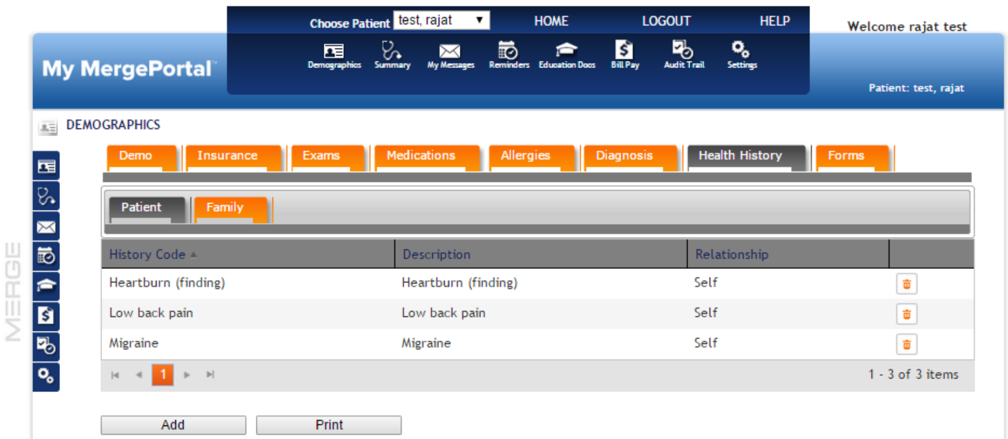
2. Do one of the following:

   - Click **Print** to open a print preview page from which you can print the conditions list.
   - Click a trash can icon located to the right to remove the corresponding condition.

Health History

To manage a patient's health history

1. Navigate to the Demographics feature and click the **Health History** tab to view your health history, which includes a history code, description and relationships.



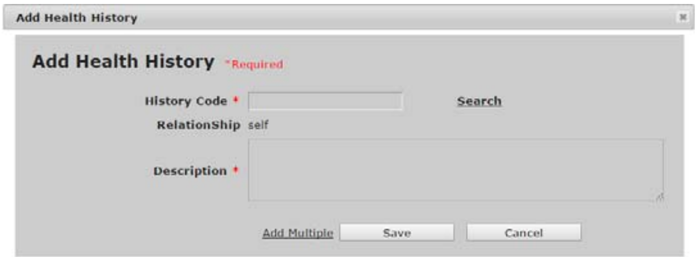
The Patient subtab displays your history and the Family subtab displays your family's history.

2. Do one of the following:

   - Click **Add** to add a health history record.
   - Click **Print** to open a print preview page from which you can print the condition history list.
   - Click a trash can icon located to the right to remove the corresponding condition.

To add a health history record

1. Click **Add** in either the **Patient** or **Family** subtabs. The Add Health History dialog opens.



2. Do one of the following:

   - Click **Search** to search for and select the appropriate history code.

   - Click **Add Multiple** to view a list of history codes, from which you can select two or more. Click **Save**.

3. If recording a history entry for yourself, the **Relationship** field is set as **Self**. If recording a history entry for a family member, identify the relationship of the family member from the **Relationship** drop-down list.

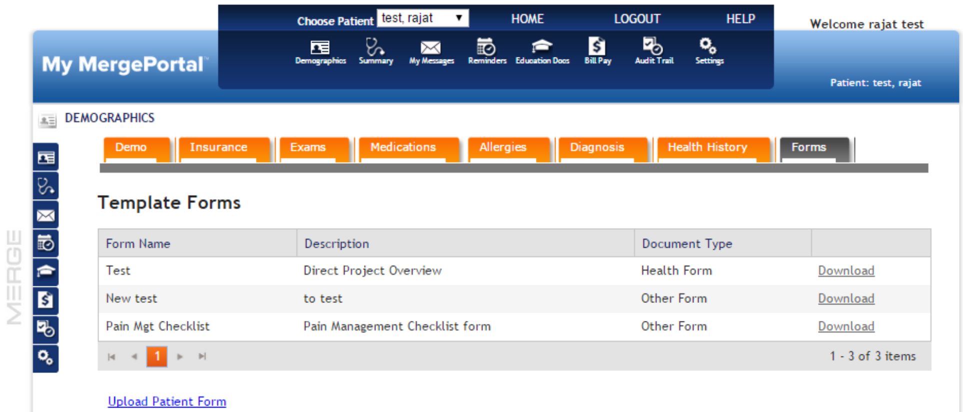
4. The **Description** field entered automatically using the description from the History Code.

5. Click **Save**. The Add Health History dialog closes and the Patient Health History list displays the new history entry.

Forms

To download and upload forms

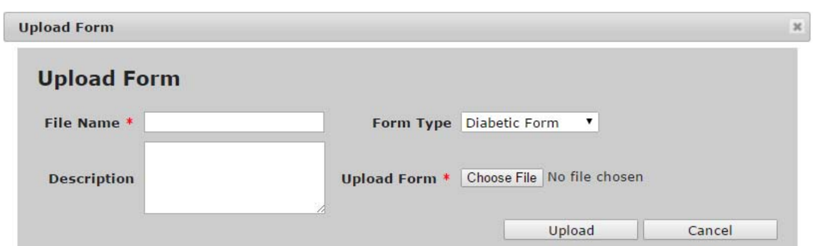
1. Navigate to the Demographics feature and click the **Forms** tab to display a list of available forms.



2. Click **Download** for one of the listed forms to download it. When the download completes, open the download from either your browser notification or navigate to your downloads folder and open.

3. Edit the form as required. Save and close the form.

4. To upload the completed form, click **Upload Patient Form**. The Upload Form dialog opens.

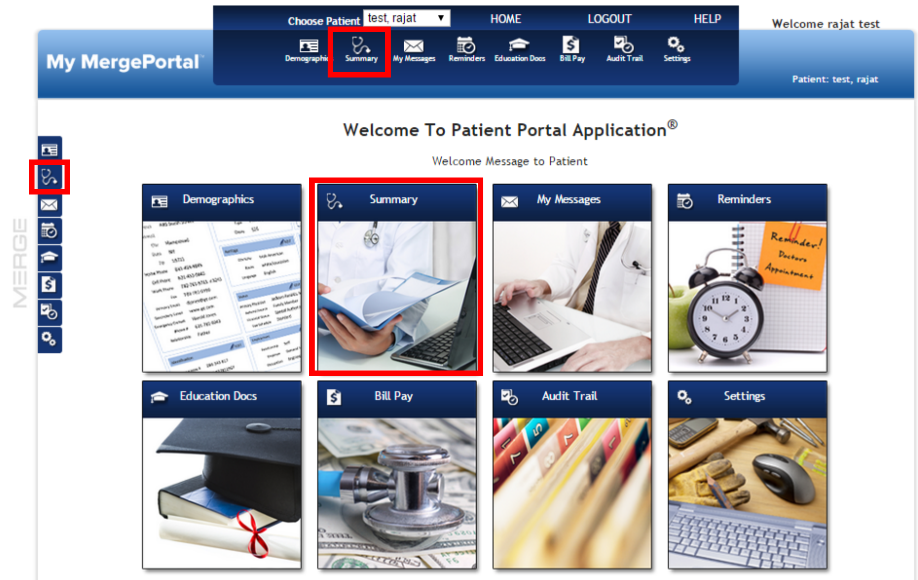


5. Type the **File Name** and **Description** and select a **Form Type**. Click **Choose File** to navigate to and select the file that you want to upload.

6. Click **Upload**. A confirmation appears upon successful upload, and the Upload Form dialog closes.

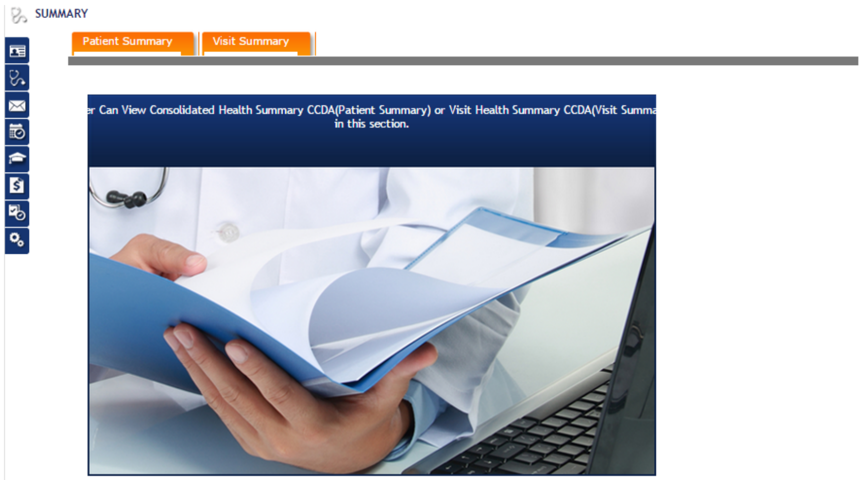
Patient and Visit Summary

The Summary feature of My MergePortal allows patients and patient authorized representatives to view, download, print, and transmit patient and patient visit summaries.

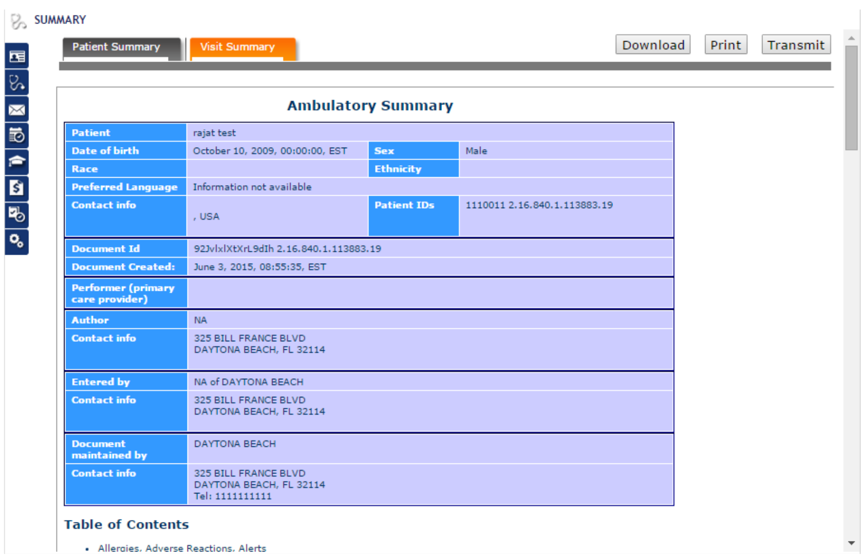


To view the patient and/or patient visit summary

1. Navigate to the Summary feature, the Summary page opens.

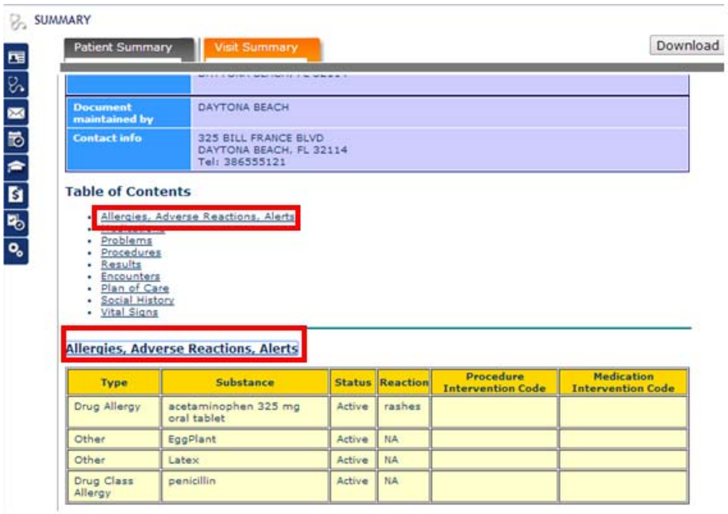


2. Click the summary tab you want to open: **Patient Summary** or **Visit Summary**.

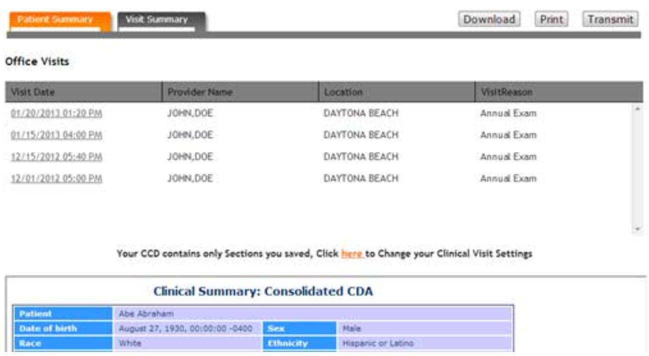


3. Do one of the following:

- In the Patient Summary tab, scroll to the Table of Contents section to quickly navigate to different sections of the summary.



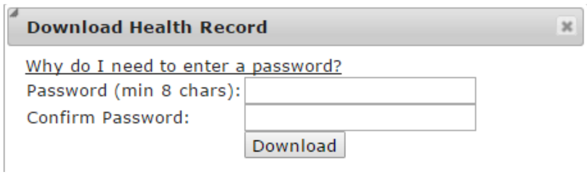
- In the Visit Summary tab, select one of the visit Summaries to view. The selected Visit Summary opens.



To select which sections are displayed in the Visit Summary, see **"To select visit summary sections" on page 38**.

To download a summary

1. Click **Download** from the summary tab you want to download. The Download dialog opens.



2. Type your password in both fields and click **Download**. A ZIP file is created containing three files: a CCD XML document, a CCD XSL Stylesheet, and a TXT file.

   The ZIP file can be unzipped using '7 zip'. You are prompted to type the password specified during download to unzip the files.

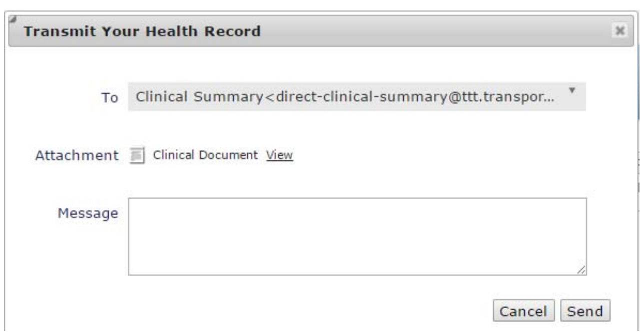
To print a summary

1. Click **Print** from the summary tab you want to print. The print preview and set up options are displayed.

2. Select the printer settings and print the summary.

To transmit a summary

1. Click **Transmit** from the summary tab you want to transmit. The Transmit Your Health Record dialog opens.



2. Select the appropriate recipient from the **To** drop-down list.

3. Next to **Attachment**, click **View** to display a preview of the summary that will be sent to the recipient.

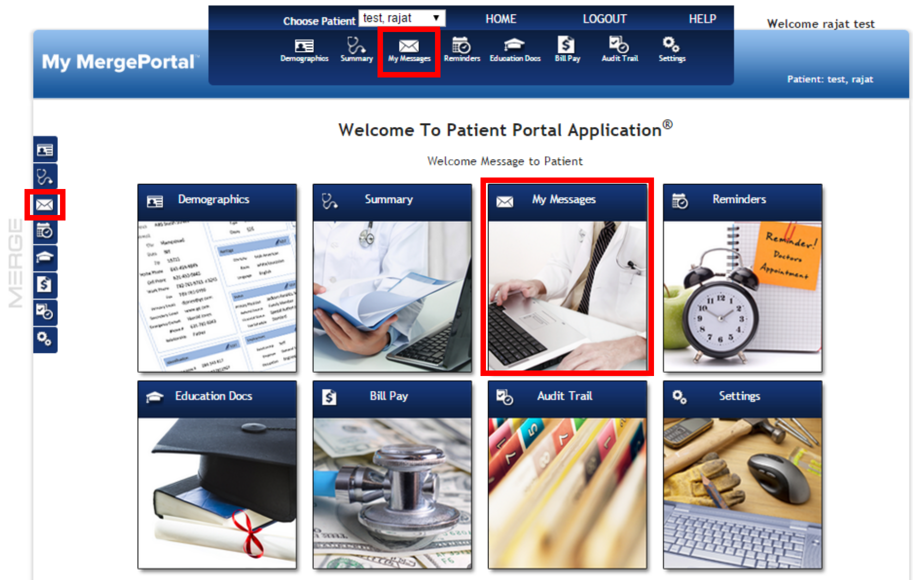
4. Type a **Message** to the recipient.

5. Click **Send**. The summary is transmitted to the selected recipient.

6. A message is displayed indicating if the summary has been sent successfully or not.

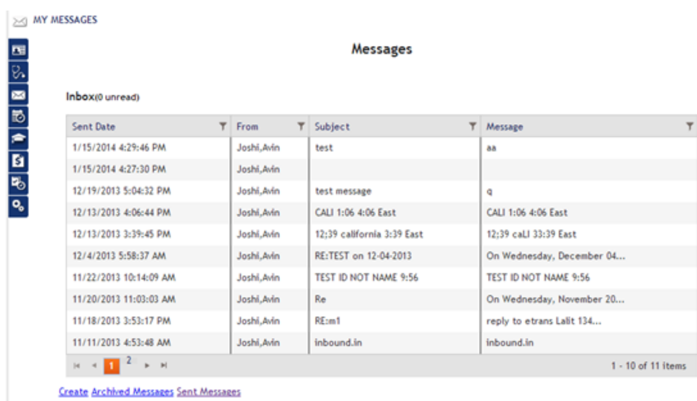
My Messages

The My Messages feature of My MergePortal allows patients and patient authorized representatives to send and receive emails from and to My MergePortal staff users.

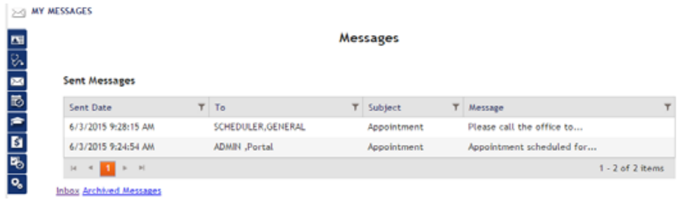


To view My Messages

1. Navigate to My Messages. The My Messages page opens and displays a list of messages sent from staff users. Unread emails appear in bold.



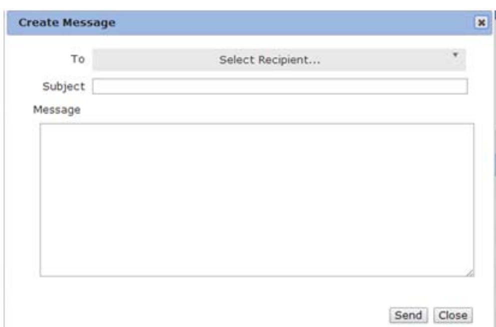
2. Click the **Sent Messages** link on the My Messages page to view sent messages.



3. Click a message line item to view the message. The Message Details dialog opens where you can reply to, archive, or close the message.

To create a new message

1. Click the **Create** link at the bottom of the My Messages page. The Create Message dialog opens.



2. Select a staff user recipient from the **To** drop-down list.

3. Type a message **Subject**.

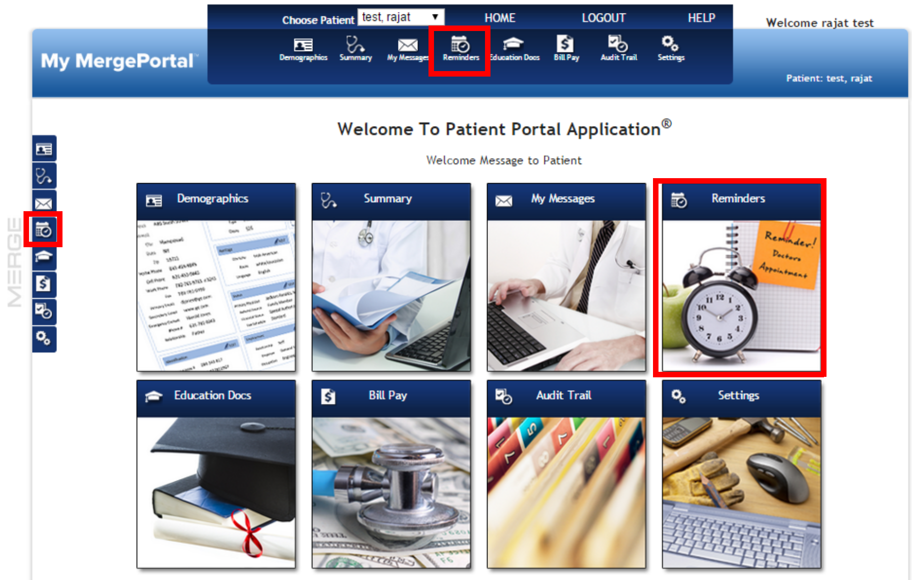
4. Type a **Message** to the recipient.

5. Click **Send** to send the message to the specified recipient.

NOTE: You can look at archived messages by clicking the **Archive Messages** link.

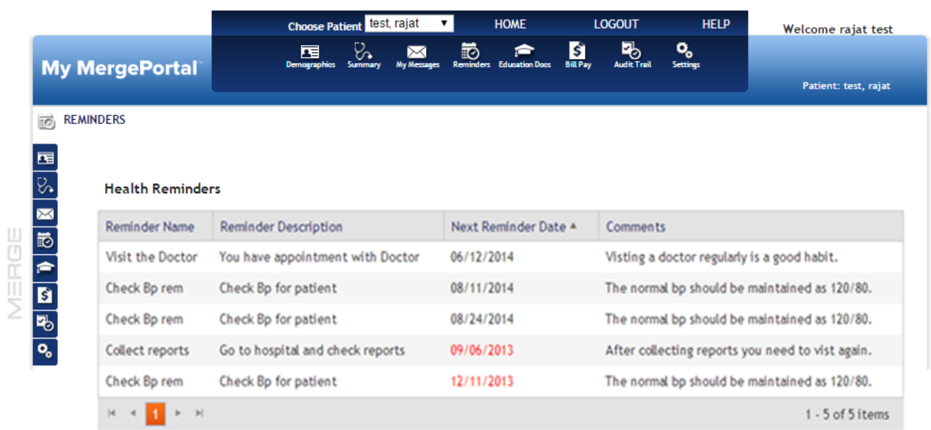
Reminders

The Reminders feature of My MergePortal allows you to view a list of health reminders.



To view reminders

1. Navigate to the Reminders feature. The Health Reminders page opens displaying a list of reminders.

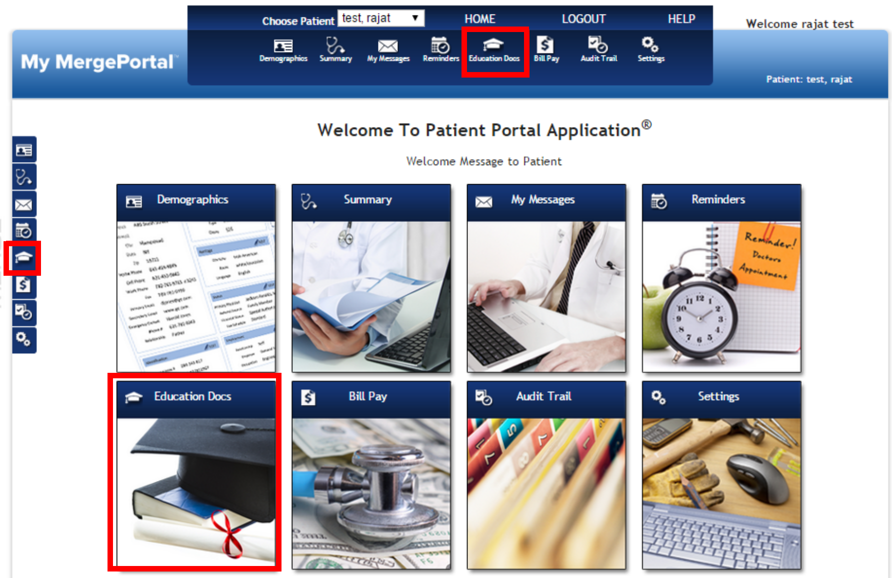


Reminder Name	Reminder Description	Next Reminder Date ▲	Comments
Visit the Doctor	You have appointment with Doctor	06/12/2014	Visting a doctor regularly is a good habit.
Check Bp rem	Check Bp for patient	08/11/2014	The normal bp should be maintained as 120/80.
Check Bp rem	Check Bp for patient	08/24/2014	The normal bp should be maintained as 120/80.
Collect reports	Go to hospital and check reports	09/06/2013	After collecting reports you need to vist again.
Check Bp rem	Check Bp for patient	12/11/2013	The normal bp should be maintained as 120/80.

2. For information on disabling reminder emails, see **“To enable or disable reminder emails” on page 38**.

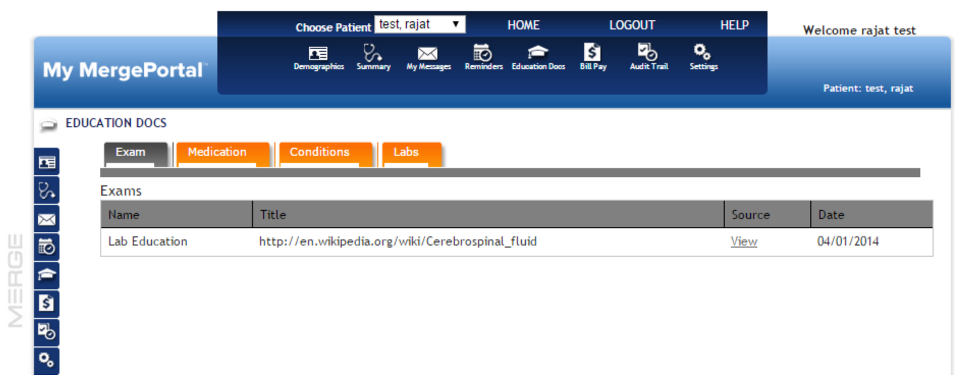
Education Documents

The Education Documents feature of My MergePortal allows patients to view documents that could be informative in the categories of Exams, Medications, Conditions, and Labs.



To view documents

1. Navigate to the Education Docs feature. The Education Docs page opens and defaults to the Exam tab.



2. Click a document type tab from the following available tabs:

- **Exam** — enables you to view education documents. Document information includes Document Name, Document Title, a link to the doc source and the date the document was provided to the patient.

- **Medication** — enables you to view documents pertaining to past medications. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.

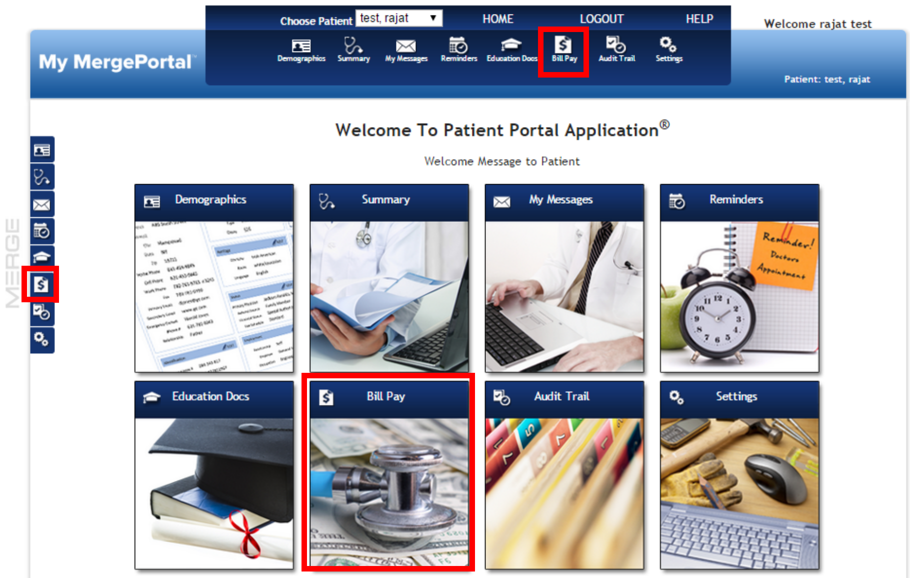
- **Conditions** — Enables you to view documents pertaining to past conditions. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.

- **Labs** —Enables you to view documents pertaining to past lab procedures. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.

3. Click a **View** link from the **Source** column to view the corresponding document.

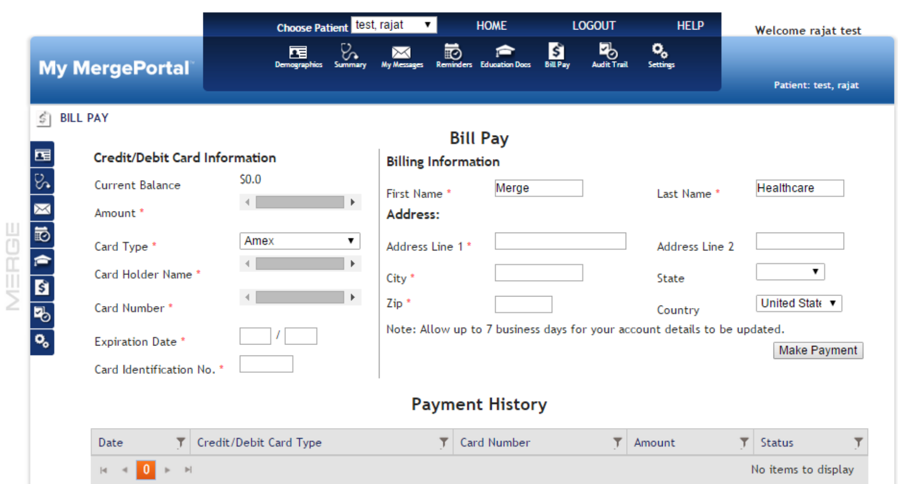
Bill Pay

The Bill Pay feature of My MergePortal enables you to make payments and view payment history.



To enter payment information

1. Navigate to the Bill Pay feature. The Bill Pay page opens.



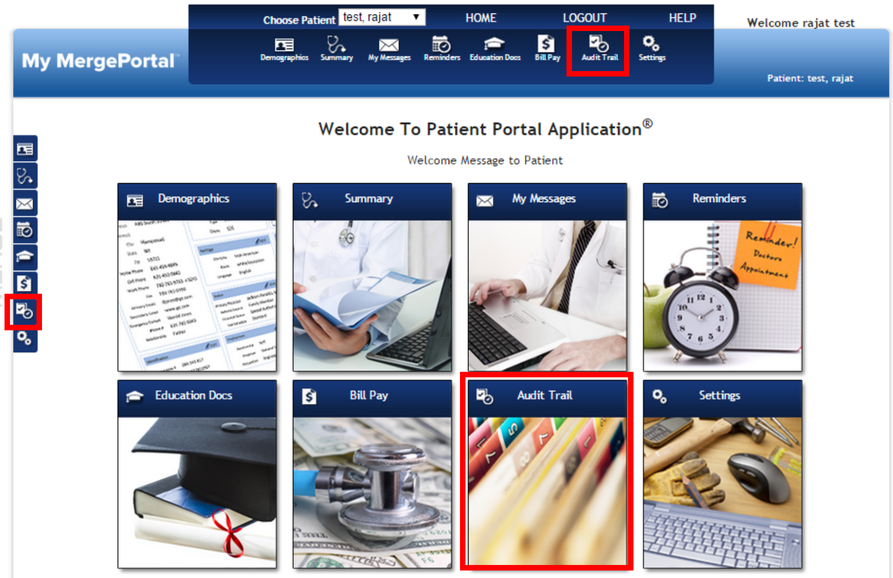
2. Enter payment information in the Bill Pay section. The billing information is automatically populated with information associated with the patient.

3. Click **Make Payment**.

4. View your payment history and payment status in the Payment History section.

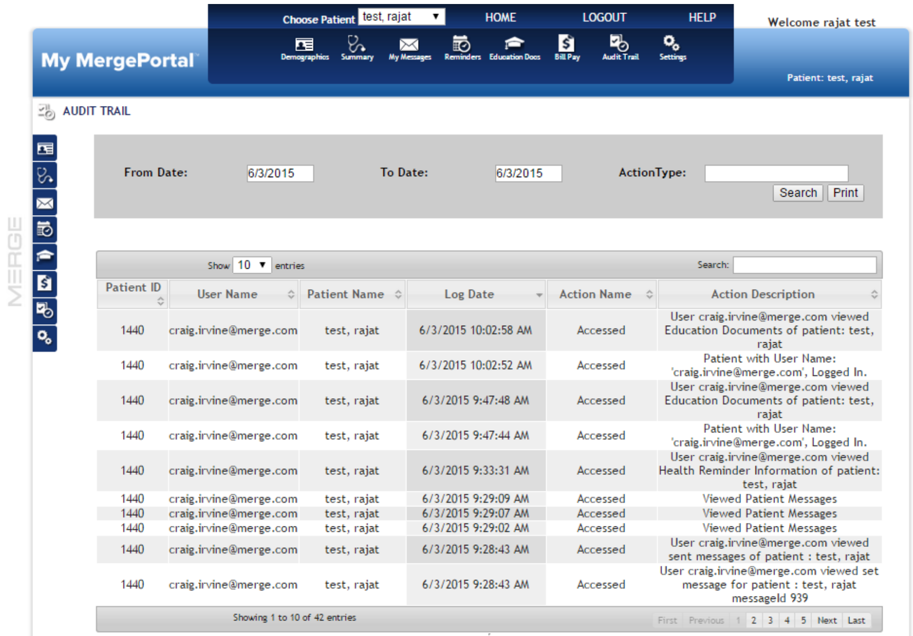
Audit Trail

The Audit Trail feature of My MergePortal allows patients to view a report of all of the portal actions they have taken during a specific date range.



To view the audit log

1. Navigate to the Audit Trail feature. The Audit Trail page opens.



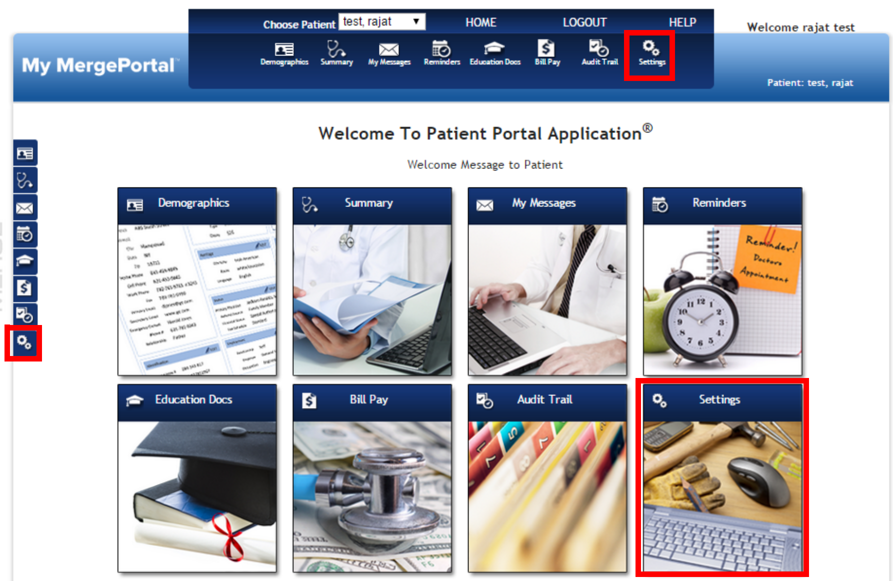
2. The **From** and **To** dates default to the current date. Adjust the dates as required.
3. If desired, type an **ActionType** to narrow the search results.
4. Click **Search**. The list is updated.

NOTE: The **User Name** field indicates the user name of the person who took the action. The **Patient Name** field indicates the patient related to the action that was taken. The values in these fields will only be different if a patient-authorized representative took action in the portal on behalf of a patient.

Settings

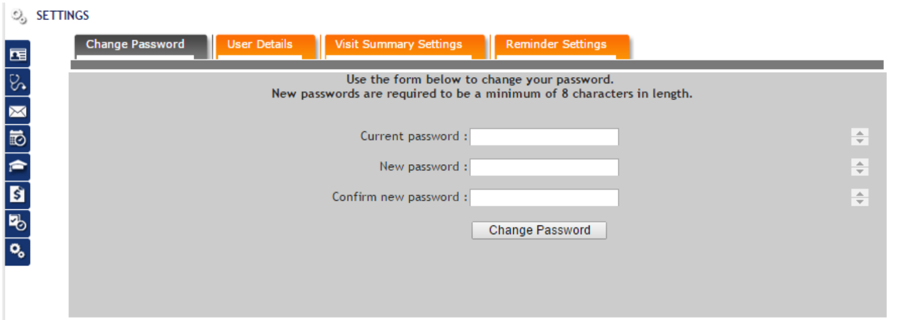
In the Settings feature of My MergePortal you can:

- change your password, see **"To change your password" on page 37**.
- edit security questions, see **"To change your secret question" on page 37**.
- select which Visit Summary sections to display, see **"To select visit summary sections" on page 38**.
- enable/disable reminder emails, see **"To enable or disable reminder emails" on page 38**.



To change your password

1. Navigate to the Settings feature and click the **Change Password** tab. The Change Password tab opens.

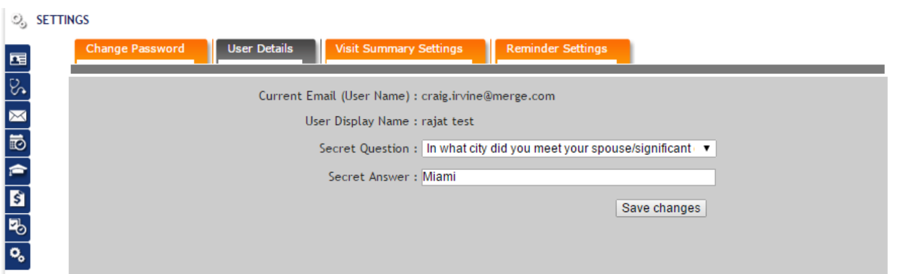


2. Type your **Current password**. Then type your **New password** and **Confirm new password**.

3. Click **Change Password**. The password change is saved.

To change your secret question

1. Navigate to the Settings feature and click the **User Details** tab. The User Details tab opens.



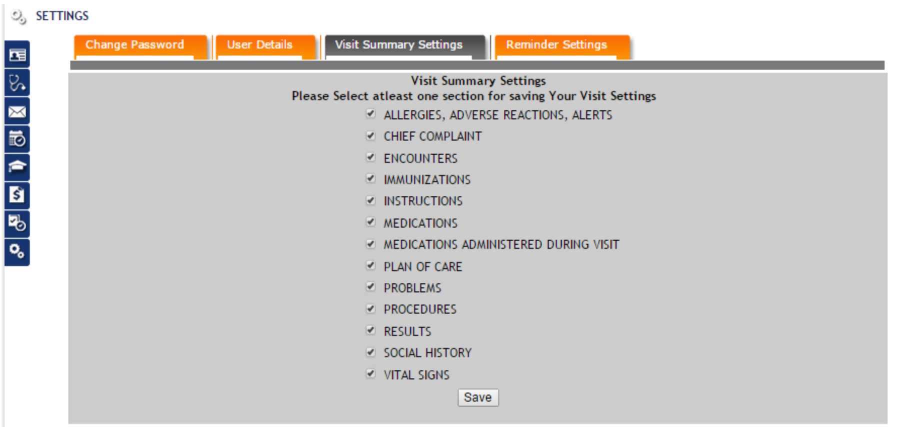
2. Select a **Secret Question** from the drop-down list.

3. Type the **Secret Answer** to the security question.

4. Click **Save Changes**. The secret question and answer change is saved.

To select visit summary sections

1. You can include or exclude sections of the Visit Summary. Navigate to the Settings feature and click the **Visit Summary Settings** tab. The Visit Summary Settings tab opens.

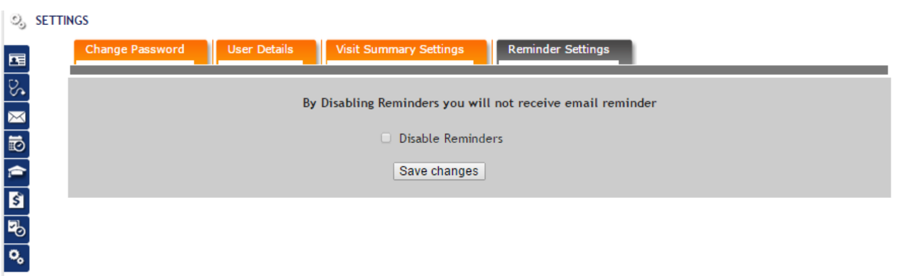


2. Select or deselect the sections you want to include or exclude in the visit summary.

3. Click **Save**.

To enable or disable reminder emails

1. Navigate to the Settings feature and click the **Reminder Settings** tab. The Reminder Settings tab opens.



2. Select or deselect the **Disable Reminders** option. When selected, **Disable Reminders** prevents reminder emails from being sent to the email address associated to the account.