MyChart Patient Guide

Welcome to MyChart

MyChartprovides you with online access to your medical record. It can help you participate in your healthcare and communicate with your providers.
From MyChart, you can:

- Review summaries of your previous appointments, including issues addressed duringeach visit, your vital signs, and tests or referrals that were ordered.
- View your medications, including dosage information and instructions, and request a refill.
- View new lab results, as well as trends over time. For example, view results for your past cholesterol tests on a graph to see if you're close to meeting your target number.
- Thisguide provides an overview of many of MyChart's features and how to use them.

Sign up for a MyChart account

To sign up for MyChart, this will depend on your state's age requirements.
There are several different methods of MyChart signup that might be used by different departments across the organization:

- Clinic staff might sign you up directly while you're at the front desk or in the exam room.
- You might receive a MyChart activation code on your After Visit Summary.
- You might receive a text or email with an activation code when you come in for a visit

Use your activation code to sign up

- From the MyChart login page, click **Sign Up Now** in the New User? section.
- Enter your activation code and other personal verification items, such as your date of birth. Click **Next.**
- On the next page, choose the following:
  - **MyChart username**: This should be something that others wouldn't be likely to guess but easy for you to remember. It cannot be changed at any time.
  - **Password**: This should be a unique combination of numbers and letters, using both uppercase and lowercase letters. Your password must be between 5-20 characters and must be different from your MyChart username. Choose a password that you don't use for other websites.
  - **Security question**: This question will be used to verify your identity if you forget your MyChart password. Choose a security question from the list and enter your answer. Your answer cannot include your MyChart password.
- On the next page, choose whether you want to receive a notification message in your personal email when there is new information available in your MyChart account. If you opt to receive email alerts, enter your email address.

Log in to MyChart

- In your web browser, enter myplannedparenthoodchart.org and access the login page.
- Enter your MyChart username and password, and click **Sign In**.

What if I forget my MyChart username or password?

- Click the **Forgot Username?** or **Forgot Password?** link below the login fields for assistance.
- You will be prompted to answer some security questions to verify your identity so you can recover your username or password.
- If you fail to recover your password after 5 unsuccessful attempts, you will be directed to reset your password.
- If you have 5 unsuccessful attempts at resetting your password, your account will be deactivated and you'll need to contact your local health center or 1-800-230-PLAN.

Health

View your test results

With MyChart, you can view test results as soon as they become available, rather than waiting for a phone call or letter from your physician. To view test results, go to **Menu** > **Test Results**. Select a test to see more information about it, such as:

- The standard range for the result
- Any additional comments your provider entered about the result

- Download the MyChart app

If you're looking for a specific result, enter key words in the search field on the Test Results page.

Receive email or text messages when new results are available

- Go to **Menu** > **Communications**.
- Expand the Health section and select a notification option next to Test Result.
- Update your email address and mobile phone number if needed at the bottom of the page.

Manage your medications

View your current medications

Go to **Medications** to see all of your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the physician who prescribed the medication. You can view additional information about a medication, such as precautions to consider when taking the medication and potential side effects, by clicking the **Learn more** link.

- Remove a medication you're no longer taking by clicking **Remove** and then adding comments about why you're no longer taking that medication.
- Add a new medication by clicking **Add a Medication** and then adding comments about why you're taking the new medication.
  Your chart will be updated after your healthcare provider reviews the change with you at your next visit.

Request a medication refill

- From the medication list, click **Request Refills**.
- Select the check box next to the medication you need refilled and enter any comments. Click **Next**.
- Select a delivery method, pharmacy, and pickup date and time that's convenient for you, if applicable. Click **Next**.
- Review the details of your refill request and click **Submit**.

You will receive a message in your MyChart Inbox when your prescription refill is processed.

You can request refills only for prescriptions that were filled at a pharmacy within your healthcare organization. If you need a medication refill for a prescription at an external pharmacy (for example, Walgreens or CVS), you'll have to contact that pharmacy to request a refill.

View a summary of your health information

To get a summary of your medical record, go to **Menu** > **Health Summary**. This summary includes:

- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care

Respond to questionnaires from your clinic

Your clinic might make questionnaires available from MyChart so you can complete them online instead of filling out a form when you get to the clinic.
You might be able to respond to questionnaires in three different places:

- Open generally available questionnaires from **Menu** > **Questionnaires**.
- If your provider wants you to complete a questionnaire for an upcoming appointment, go to **Complete eCheck-in for the visit**. Locate the upcoming appointment and click **Details**. Open the questionnaire by clicking its name in the Questionnaires section of the appointment details.
- If your doctor sends you a MyChart message with an attached questionnaire, open it by clicking the questionnaire link near the top of the message.
- If you need to close a questionnaire before you finish it, click **Finish Later** to save your progress.

Messaging

View messages from your clinic

You can read any messages sent by your doctor or other clinic staff by going to your Inbox (**Messaging** > **Message Center**).

> If you're looking for a specific message, enter key words in the search field on the Inbox page.

Receive email or text messages when new MyChart messages are available

- Go to **Menu** > **Communications**.
- Expand the Messages section and select a notification option.
- Update your email address and mobile phone number if needed at the bottom of the page.

Ask your doctor for medical advice

If you have a non-urgent medical question, you can send a message to your care team. This message is secure, meaning your information stays private as it is sent over the Internet.
You might use the Get Medical Advice feature if you're not sure whether you should come in for an appointment, if you need clarification on the dosage of one of your medications or something that was discussed in a recent visit, or if you just want advice about a common illness.

- Go to **Messaging** > **Ask a Question**.
- Click **New Medical Question**.
- Select a recipient from the list. This list might include your primary care provider, another doctor with whom you've recently had an office visit, or the general nursing staff at the clinic.
- Select a subject for your message and enter your question.
- When you are finished, click **Send**.

Someone at your health center should respond to you within two business days. If you've opted to receive notification for new messages in your MyChart account, you'll receive a message or push notification letting you know that the clinic has responded to your request.

> To view a message after you've sent it, go to **Messaging** > **Message Center** and select the **Sent Messages** tab. Messages that have an eye icon have not yet been read by clinic staff.

Visits

View your past or upcoming appointments

You can view your past or future appointments by going to **Visits** > **Appointments and Visits**.
Select a scheduled future appointment or click **Details** to see info such as:

- The date, time, and location of the visit
- Any pre-visit instructions from the clinic
- Directions to your clinic

If an upcoming appointment is eligible for eCheck-in, you can use it to take care of tasks such as the following before you arrive at the clinic:

- Pay visit copays
- Pay pre-payments and balance payments
- Verify or update insurance and demographics information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires
- Verify guarantor information

For past appointments, you can click **View After Visit Summary** to see a summary of the care you received during your visit. You can also view any of your doctor's visit notes that are shared with you by clicking **View notes**.

Schedule an appointment

To schedule an appointment, go to **Visits** > **Schedule an Appointment**. Depending on the reason for scheduling or type of appointment you choose, you'll be directed to the Schedule an Appointment or Request an Appointment page.

When you schedule an appointment, you make the appointment yourself and don't need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can choose a location and enter preferred dates and times. Pick an appointment from the list of available time slots to schedule it.

> If you don't find the appointment date or time you want when you schedule an appointment, you can add yourself to the wait list to receive notification if earlier appointment times become available. Wait list options are available during scheduling and after you've scheduled when you click Details for an appointment from the Upcoming Visits list.
> You can also favorite an appointment to make it easy to schedule the same type of visit again later with the same provider and department.

Cancel an appointment

Depending on the date and time of your next appointment, you might be able to cancel it through MyChart. If it is less then 15 minutes until your appointment time, you'll need to call the health center to cancel your appointment.

- Go to **Visits** > **Appointments and Visits**, and select the appointment from the list or click **Details**.
- Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.

Have a video visit with your doctor

You can schedule a video visit to have a face-to-face interaction with your doctor from the convenience of home or work. Video visits are scheduled in the same way as other appointments. For more information about scheduling, refer to Schedule or an appointment.

> If you need care right away, you might be able to use an on-demand video visit to talk to a doctor now rather than scheduling a video visit appointment for later. Go to **Visits > Talk to a Doctor** to connect with an available provider.

Prepare for your video visit

To ensure a smooth connection, complete the following tasks well in advance of your video visit:

- Make sure you have a webcam set up. This can bea webcamthat's part of a laptop ora separate USB webcam.
- Make sure you've installed Adobe Flash Player with the most recent updates.

After you've done these things, you can test that everything is working in MyChart. You should complete this test at least 1 hour prior to your video visit start time.

- Go to **Visits** > **Appointments and Visits**.
- Locate the video visit and click **Details**.
- Click **Test Hardware** to make sure that your camera and microphone are working. Note that this button no longer appears when the option to connect to the video visit becomes available, typically 1 hour prior to the visit.

Connect to the video visit

You can connect to the video visit a certain amount of time before your appointment start time.

- Go to **Visits** > **Appointments and Visits**.
- Locate the video visit and click **Details**.
- Click **Begin Video Visit**.

> When it's time to connect to your video visit,an alert appears on the MyCharthome page. You can also click the link in this alert to connect.

- After you connect to the video visit, you might need to wait for your doctor to connect.

Control the video visit

During the video visit, you can resize the window and move it around your screen if needed without worrying about disconnecting. You can also pause the visit by clicking the pause icon. Pausing the visit pauses both the video and audio so that your doctor cannot hear or see what you're doing.

View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.

- Go to **Menu** > **Document Center** and click **Visit Records**.
- Select a visit on the **Single Visit** tab or use the **Date Range** tab or **All Visits** tab to select multiple visits. Then:
  - Click **View** to view a copy of the visit summary.
  - Click **Download** to save a copy of the visit summary for your records.
  - Click **Send** to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.

Download medical records you've requested

If you've requested a copy of your medical record from your healthcare organization, you can download and view it from MyChart, rather than having to wait for a paper copy to arrive in the mail.

- Go to **Menu** > **Document Center** and click **Requested Records**.
- Locate the record you want to view and click **Download**.
- If the record is password protected, you see a message to warn you. Click **Continue Download**.
- Click **Save** to save the file to your computer and then open it, or click **Open** to open it without saving it to your computer.
- If the record is password protected, click **Show Password** on the Requested Records page to view the password you need to access the document and enter it to view the document.

Share your medical information with someone else

Share Everywhere is a way for you to share your medical information with the people who are taking care of you. Using your MyChart or MyChart mobile account, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a note back to your health system to help keep your care team informed of the care they provided.

- Go to the Share My Record activity.
  - On the MyChart website, go to **Menu** > **Share My Record** and select **Give one-time access with Share Everywhere**.
  - On the MyChart mobile app, tap the Share My Record activity on the home screen after you've logged in. Note that you must update the MyChart mobile app to version 5.4 or higher to use Share Everywhere.
- Enter the name of the person who will be viewing your record and request the share code.
- Tell that person to go to **www.shareeverywhere.com** to enter the code along with your date of birth.

See your medical information from other healthcare organizations

If you've been seen at another healthcare organization, you might be able to view information from that medical record right in MyChart. You might have heard this feature referred to as Happy Together. The information you might see from other organizations includes:

- Allergies
- Care team
- Health issues
- Medications
- Messages
- Test results
- Visits

To view this information, you must link your account. Go to **Menu** > **Share My Record** > **Link Your Accounts** to get started. Then, select your account from the list and click **Link Account**.

After you've linked your accounts, information from the other organization appears in MyChart with a icon.

> For more information about how linked accounts work and what information you can see from each healthcare organization, click **See more** and then click the link for the FAQ page.

Billing and Insurance

View your outstanding balance

To see the outstanding account balance for any of your accounts, go to **Menu** > **Billing Summary**. To view additional information about an account, including past statements, click the **View account** link.

> If you have a question about your balance or other information for a billing account, you can use the **Contact customer service** link to send a message.

Make a payment for an outstanding account balance

- Go to **Menu** > **Billing Summary**.
- Click **Pay Now** for the account on which you want to make a payment.
- Enter the amount to pay along with your credit card or bank account information. Click **Continue**.

Review your payment information and click **Submit Payment**.

> If you can't pay your entire balance all at once, you can set up a payment plan to pay a smaller amount each month.

Sign up for paper statements

- From the Billing Summary page, click the paperless billing alert.
- If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number and select the corresponding check box to receive notifications.
- Select the **I understand that I will no longer receive statements in the mail** check box and click **Sign Me Up**.

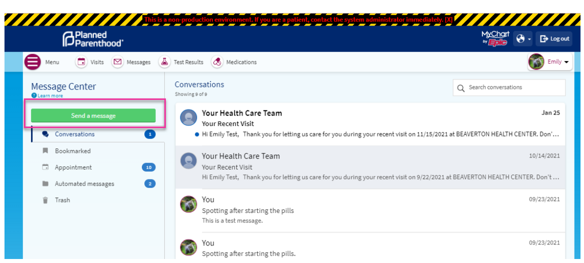
Review and update your insurance information

To review the insurance information your clinic has on file, go to **Menu** > **Insurance Summary**. Click **Det ails** for the payor or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.
To update your insurance information, make any of the following changes:

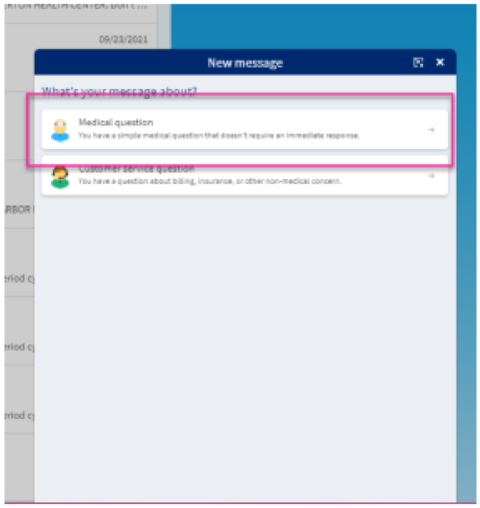
- Request a change to an existing coverage.
- Remove a coverage.
- Add a new coverage. New coverages are submitted for verification when you log out of MyChart.

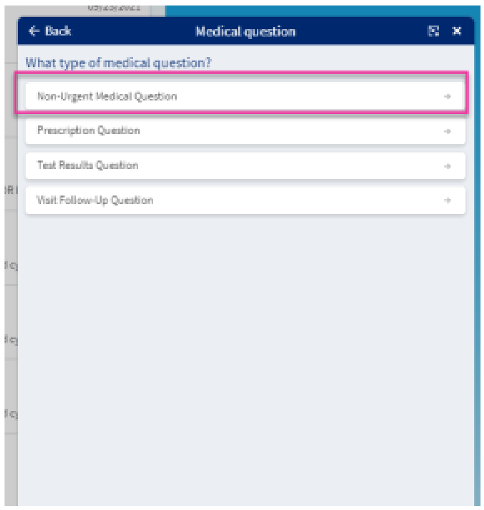
Upload an Insurance Card or Other Documents.

- The patient will access their message center and click Send a message.

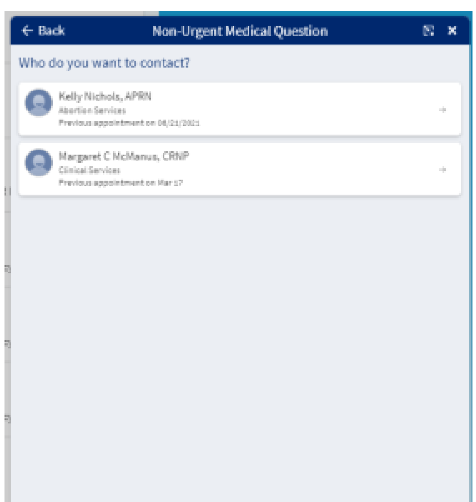


- They will then select either Medical or Non Medical (non-medical ends up with CRM or billing pools)
- Using a **Non-Urgent Medical Question**.

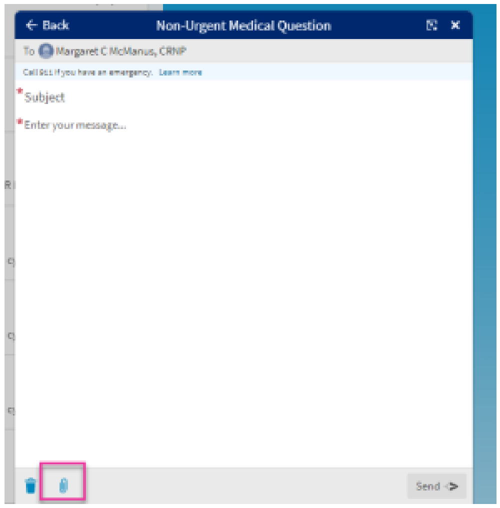




- The patient will then select the provider that is requesting the ID/Documentation or the provider the patient is scheduled with.



- Once the patient gets to the body of the message, they can use the paperclip icon to attach any document. Patients have the ability to attach all kinds of files including pictures.



- Once the patient clicks the **Send**button, the message and the attachment is sent to the provider pool/in basket. This can be managed by clinical or clinical support depending on how your affiliate wants to delegate.

Preferences and Administrative Features

Personalize MyChart

There are three ways you can personalize how MyChart appears for you and each of your family members. For each account you have access to, you can:

- Specify the color scheme.
- Change the name that appears under that person's photo.
- Add or change the photo. Note that photos you upload through MyChart are visible to medical staff, so you should only use a photo that shows each person's face.
    - Go to **Menu** > **Personalize**.
    - Click **Edit**.
    - Make any of the changes described above and then click **Save**.

Update your personal information

You can update your address, phone number, email address, and other personal details at any time so that your clinic always has the most up-to-date information in your record.

- Go to **Menu** > **Personal Information.**
- Click **Edit** in the section for the information you need to update.
- Confirm that your updated information is correct, and then click **Save Changes**.

Customize your notification preferences

MyChart can send you notification by email or text message when there is new information available in your MyChart account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

- Go to **Menu** > **Communications**.
- Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive.
- Update your email address and mobile phone number if needed.

Change your MyChart password or update your security question and answer

To ensure that your medical information stays protected, consider changing your MyChart password periodically. To do so, go to **Menu** > **Security Settings**. From this page, you can also update the security question and answer that are used when you forget your MyChart username or password.

Protect your account with two-step verification

You can ensure that your account stays secure even if someone else has your username or password by turning on two-step verification. When this feature is turned on, you must enter a code that is sent to you by email or text message to log in to MyChart, in addition to using your username and password.
When you log in to MyChart for the first time, you might be prompted to verify your email address and phone number to enable two-step verification. If you decide to turn off two-step verification instead, you can turn it on again later.

- Go to **Menu** > **Security Settings** and click **Turn on Two-Step Verification**.
- Confirm your email address or phone number, enter your MyChart password, and then click **Continue**.
- Select whether you want to receive the security code to turn on two-step verification by email or text message.

Mobile Apps

MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the MyChart website, allowing you to do all of the following, and more!

- View test results
- Send and receive messages
- Schedule and confirm upcoming appointments and view visit summaries for past appointments
- View your health summary, including allergies, immunizations, current health issues, and medications
- View preventive care procedures and when they are due
- Request and pay for medication refills
- View billing statements and pay balances due and visit copays
- Access family members' charts

If you have an iOS device, you can pair it with Apple Watch. With MyChart for Apple Watch, you can:

- See alerts for new information in MyChart
- View upcoming appointments
- Read messages
- Review your medication list

Download the MyChart app

To install the MyChart app, go to the App Store or Google Play Store and search for "MyChart."

- After you open the app, select your primary healthcare organization from the list of organizations. You can search for your organization by name, state, or ZIP code. You can easily add or switch between your MyChart accounts at different healthcare organizations using the **Switch Organizations** button on the login screen or the **Switch Organization** menu option after you've logged in.