



<b>PATIENT PORTAL</b>	Date issued: 02/06/2017 Revised:
Issued by: Emily Oakes, Beebe Medical Group Clinical Application/ Policy Development Analyst Approved by: Approved by: George V. Jirak, MD, MBA, President/CEO, Beebe Medical Group J. Eric Hale, MD, Medical Director-Primary Care Beebe Medical Group Physician Advisory Committee	

### **VISION STATEMENT**

Beebe Medical Group (BMG) will be the leader in the delivery of exceptional medical care exceeding patient expectations while maintaining high patient, provider, and staff satisfaction.

### **PURPOSE**

The purpose of this policy is define the use of the BMG Patient Portal as the use of technology expands for the delivery of secure communication between patients and authorized family members/care givers and their care team, as well as 24 hour access to certain elements of the patient medical record.

### **SCOPE**

This policy encompasses all staff, providers, and patients within Beebe Medical Group.

### **DEFINITIONS**

**Patient Portal** - is a secure online website that gives patients convenient 24-hour access to personal health information from anywhere with an Internet connection. Patients can use the Patient Portal to view, download, and transmit their health information 24 hours, 7 days a week and to send secure messages to their provider Monday through Friday 8:00 am to 4:30 pm.

**Portal Message** - is an interactive process between the licensed clinician and patient/parent that occurs using a secure, interactive electronic system (BMG uses athenahealth Patient Portal for secure messaging interactions with our established patients)

### **POLICY**

- I. It is the policy of BMG to provide patients and authorized family members/care givers the opportunity to enroll in a secure, confidential and easy to use website that give patients and authorized family members/care givers 24 hour access to elements of their medical records and access to their care team Monday through Friday 8:00 am to 4:30 pm except for holidays or when practice is closed due to inclement weather.
  - To gain access, click on the link at the top of the Beebe Medical Group web-page ([www.beebemedicalgroup.org](http://www.beebemedicalgroup.org))
  - Patients can view their Patient Portal account anywhere they have Internet access; the desktop version of the Patient Portal supports the following browsers:
  - Internet Explorer 11.0 and later
    - Microsoft Edge 3.0 and later
    - Google Chrome 30.0 and later
    - Mozilla Firefox 40 and later
    - Apple Safari 9 and later

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- Using the Patient Portal, patients can:
    - Update personal information.
    - Exchange secure messages with your provider/care team (Monday through Friday 8:00 am to 4:30 pm except for holidays or when practice is closed due to inclement weather)
    - Request an appointment
    - View upcoming appointments and appointment ticklers
    - View past medications, past allergies, and past problems
    - Preview and download the health record
    - Transmit the health data to Microsoft HealthVault (a personal health record site)
    - Retrieve test results; A result must be released by a provider or designee to the Patient Portal in order for the patient or authorized family members/care givers to view it
    - View account statements
    - Pay balances
  - **Patient Portal shall not** be used as a means to communicate **urgent** matters
    - All **urgent** matters should be communicated by calling the main office phone number of your provider
      - Phones go directly to the office Monday through Friday from 8:30 am to 4:30 pm except for holidays or when practice is closed due to inclement weather
      - After business hours phone calls are forwarded to an answering service where you will have access to a licensed provider for clinical advice
  - Every effort will be made to return a message within 4 hours of receipt, however, it is the BMG policy to respond to messages within 2 business days of receipt of the message
- II. In efforts to remain in compliance with the statutes of Delaware to protect Adolescent confidentiality for specific services including reproductive and sexual health, mental health, and drug and alcohol treatment, **any patient the age of 11 years 11 months old to the age of 18 years old**, all Patient Portal access will go from full access to the patient record to billing-only access.
- According to the Delaware Code - 13 Del. C. 1953, § 710 - Minors' consent to diagnostic and lawful therapeutic procedures relating to care and treatment for pregnancy or contagious diseases:
    - a. a minor 12 years of age or over who professes to be either pregnant or afflicted with contagious, infectious or communicable diseases or who professes to be exposed to the chance of becoming pregnant, may give written consent, except to abortion, to any licensed physician, hospital or public clinic for any diagnostic, preventive, lawful therapeutic procedures, medical or surgical care and treatment, including X rays, by any physician licensed for the practice of medicine or surgery or osteopathic medicine or surgery in this State and by any hospital or public clinic, their qualified employees or agents while acting within the scope of their employment. (<http://delcode.delaware.gov/title13/c007/sc01/index.shtml>)



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- b. Consent so given by a minor 12 years of age or over shall, notwithstanding his or her minority, be valid and legally effective for all purposes, regardless of whether such minor's profession of pregnancy or contagious disease is subsequently medically confirmed, and shall be binding upon such minor, his or her parents, legal guardians, spouse, heirs, executors and administrators as effectively as if the minor were of full legal age at the time of giving of the consent. A minor giving the consent shall be deemed to have the same legal capacity to act and the same legal obligations with regard to giving consent as if the minor were of full legal age. Consent so given shall not be subject to later disaffirmance by reason of such minority; and the consent of no other person or court shall be necessary for the performance of the diagnostic and lawful therapeutic procedures, medical or surgical care and treatment rendered such minor.  
<http://delcode.delaware.gov/title13/c007/sc01/index.shtml>

## PROCEDURE

### I. **To create a new Patient Portal account from an invitation email**

1. Open the Patient Portal email invitation, and click the link to create your account. The Verify Your Identity page appears.
2. Verify your identity by doing one of the following:
  - o Select **Call**. Verify or enter your phone number and click .
  - o Select **Text**. Verify or enter your mobile phone number and click .
3. Retrieve the temporary password from the phone call or text message, and enter the password on the Verify Your Identity page.
4. Click .
- The Set Password page appears.
5. **New password** — Enter a password that meets the requirements.
6. **Confirm new password** — Re-enter the password to confirm it.



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7. **Remember this computer to save time resetting your password** — Check the box for the Patient Portal to remember the computer that you're using.  
**Note:** You should check this box only if you're using a private or personal computer. "Remembering the computer" makes recovering your password easier and quicker if you forget it. If you allow the Patient Portal to remember the computer, you will be prompted to answer only one security question, instead of three. (The Patient Portal considers detection of a remembered computer as one step in authentication.)
8. Check the **"I accept the Terms and Conditions and Privacy Policy"** box.
9. Click .
10. The Patient Portal Welcome page appears.

## II. To create a new Patient Portal account without an invitation email

1. On the Patient Portal home page, click Sign up today.
2. **Who will use this account?** — Click the "Patient" option.
3. Enter your information (name, date of birth, gender, email address, and phone number, along with the words shown).
4. Click .
- The Verify Your Identity page appears.
5. If you are not currently registered in the practice, select a provider and a location from the menus shown.  
**Important:** If you are currently registered in the practice and see the **Register as new patient fields**, stop the registration process and call the practice at the number shown on this page to determine why your demographic information was not recognized.
6. Verify your identity by doing one of the following:
  - Select **Email**. Verify or enter your email address and click .
  - Select **Call**. Verify or enter your phone number and click .
  - Select **Text**. Verify or enter your mobile phone number and click .



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7. Retrieve the temporary password from the phone call, email, or text message, and enter the password on the Verify Your Identity page.
8. Click .  
The Set Password page appears.
9. **New password** — Enter a password that meets the requirements.
10. **Confirm new password** — Re-enter the password to confirm it.
11. **Remember this computer to save time resetting your password** — Check the box for the Patient Portal to remember the computer that you're using.  
**Note:** You should check this box only if you're using a private or personal computer. "Remembering the computer" makes recovering your password easier and quicker if you forget it. If you allow the Patient Portal to remember the computer, you will be prompted to answer only one security question, instead of three. (The Patient Portal considers detection of a remembered computer as one step in authentication.)
12. Check the **"I accept the Terms and Conditions and Privacy Policy"** box.
13. Click . The Patient Portal Welcome page appears.

### III. **To create a Patient Portal account for a family member when the account owner is not a patient**

A family member who is not a patient at BMG can create a Patient Portal (or Patient Information Center) account on behalf of a family member who is a patient at your practice. For example, a father can create a Patient Portal account for his minor child, so that he can access her health information. (**Note:** for any patient from the age of 11 years 11 months old to the age of 18 years old all Patient Portal access will go from full access to the patient record to billing-only access – Please see Policy section # II.)

#### A. **Instructions for patient's family member**

1. On the Patient Portal home page, click Sign up today.
2. **Who will use this account?** — Click the "Patient's family member" option.



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**B. Enter information about the patient**

3. **First name** — Enter the patient's first name.
4. **Last name** — Enter the patient's last name.
5. **Date of birth** — Select the patient's date of birth.
6. **Gender** — Select the patient's gender.
7. **Email** — Enter the patient's email address.
8. **Phone number** — Enter the patient's phone number.
9. **Is this a mobile phone?** — Select Yes or No.
10. **I'm not a robot** — Check the box, enter the CAPTCHA information, and click .
11. Click .

**C. Verify your identity**

12. The Patient Portal will send a temporary passcode to the patient (not to you).

**Note:** By sending the temporary passcode to the patient, we inform the patient of your request to obtain access to his or her Patient Portal account. By giving you the temporary passcode, the patient consents to your receiving access

13. Select how this passcode should be sent: email, call, or text message (these options depend on the patient contact information that is on file with the practice).
14. Click .
15. Enter the temporary passcode that the patient received by email, phone call, or text, and then click .

**D. Enter your demographic information**

16. **Relationship to patient** — Select your relationship to the patient.



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17. **First name** — Enter your first name.
18. **Last name** — Enter your last name.
19. **Email** — Enter your email address.
20. **Date of birth** — Select your date of birth.
21. **Phone** — Enter your phone number.
22. **Is this a mobile phone number?** — Select Yes or No.
23. Click .

**E. Set your password**

24. **Password** — Enter a password that meets the criteria on the right.
25. **Confirm password** — Enter your password again.
26. **Remember this computer to save time resetting your password** — If you're using your own computer or a computer that you trust, you can select this option to make it faster to reset your password if you ever need to. If you're using a public or shared computer, do not select this option.
27. Click Terms and Conditions and Privacy Policy to read both documents, and then check the box to accept the Terms and Conditions and the Privacy Policy.
28. Click . You are now logged in to your own Patient Portal account, with third-party access to your family member's account.

**IV. To add access to the Patient Portal account of a family member when you are also a patient at the practice**

A family member who is a patient at BMG can request access to the Patient Portal (or Patient Information Center) account of another family member who is also a patient. (Note: for any patient from the age of 11 years 11 months old to the age of 18 years old all Patient Portal access will go from full access to the patient record to billing-only access – Please see Policy section # II.)

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**A. Instructions for the patient**

1. Log in to your Patient Portal account.
2. Click My Profile > Family Access.
3. Click .
4. Enter demographic information about your family member who is also a patient at the practice.
  - a. **First Name** — Enter the patient's first name.
  - b. **Last Name** — Enter the patient's last name.
  - c. **Email** — Enter the patient's email address. If the patient does not have an email address, select the **No email** option.
  - d. **Date of birth** — Select the patient's date of birth.
  - e. **Phone** — Enter the patient's phone number.
  - f. **Your relationship to patient** — Select your relationship to the patient.
6. Click .  
The Patient Portal will send a temporary passcode to the patient (not to you).  
**Note:** By sending the temporary passcode to the patient, we inform the patient of your request to obtain access to his or her Patient Portal account.
7. Select how this passcode should be sent: email, call, or text message (these options depend on the patient contact information that is on file with the practice).
8. Click .
9. Enter the temporary passcode that the patient received by email, phone call, or text, and then click .

You can now access your family member's information using your own Patient Portal account. Your Family Access page shows this access.





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V. **Instructions for patients to pay balances**

1. Log in to your Patient Portal account with your email address and password.
2. Click Billing on the left side of the page.  
The Bill Pay page appears.
3. Select the charges that you want to pay. By default, all charges are selected.
  - If you do not want to pay a selected charge at this time, clear the check box. For more information about a charge, click View details.
  - To make a partial payment on a charge, change the amount in the **Payment** column.
4. Click **Make a Payment**.  
The Patient Portal transfers you to a secure payment server.
5. On the Make a Payment page, select your payment method.
  - If you previously paid a charge on the Patient Portal and saved your card number for future payments, you can select that card for your payment.
  - To enter a new card number, click **Pay with a different card** and enter the card information. Confirm or enter your billing address.
6. Click **Review Payment**.
7. In the Review and Submit step, review your credit card information, your billing address, and the charges to pay.
8. Click **Submit Payment**.  
The Payment Confirmation page displays the details of your payment. You also receive a confirmation email.
9. Click Print receipt to print this page for your records.
10. Click **Back to Bill Pay** to return to the Bill Pay page to make another payment or to review your account.

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**VI. To display information and instructions about a medication**

1. Log on to the Patient Portal.
2. Click My Health on the left side of the page.
3. Click Medications. The Medications page displays your medications.  
If additional information or instructions are available for a medication, the Rx Info link appears below the name of the medication.
4. Click Rx Info to display information and instructions.

**VII. To print a vaccination record from the Patient Portal**

Vaccination information appears on the Patient Portal Medical History page if the information is filled out in the patient chart. This information includes:

- Vaccine name
- Vaccine type
- Administered date
- Manufacturer
- Lot number
- Expiration date
- Route
- Site
- Amount (with units)
- Vaccinator, VIS Given date
- Date on VIS

To print the vaccination record (patient instructions):

1. Log on to the Patient Portal.
2. Click My Health on the left side of the page.
3. Click Medical History.
4. Display the **Vaccinations** area of the page.



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5. To see more information, click Show Vaccine Details.
6. To print the vaccination record, click Download. A .pdf version of the vaccination record appears.
7. Print the .pdf file.

**VIII. To update your password or security questions**

1. Log in to the Patient Portal.
2. Click **My Profile**.
3. Click **Security Settings**. Your Security Settings page appears.
4. To change your password:
  - a. Enter your current password.
  - b. Enter your new password, and then re-enter the new password.
  - c. Click .
5. To change your security questions:
  - a. Click Edit.
  - b. Select new questions and enter the answers for those questions.
  - c. Click .



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**IX. To reset your forgotten password**

1. Display the Patient Portal login page.
2. Click Forgot your password?.
3. Enter the email address that you use to log on to the Patient Portal and click [Email Me](#).
4. Check your email, read the message that you receive, and click the password reset link in the message.
5. On the Reset Password page, choose how to verify your identity:
  - Receive a call at your home or mobile number.
  - Answer one of your predefined security questions.
6. Click Continue.
7. Enter a new password that meets the requirements.
8. Re-enter the password to confirm it.
9. Click Continue to change your password and log on to the Patient Portal.