

Aprima Patient Portal Guide

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Contents

- Introduction5
- Payments on Portal6
- Configuration6
- Data Security6
- Setting Up the Patient Portal7
- Legal Age to Consent to Medical Treatment.....9
- Configure the Job9
- Activate the Job Schedule.....10
- Payments by Credit Card10
- Appointment Check In.....10
- Appointment Requests.....10
- Enable an Appointment Type11
- Add the Patient-Request Enabled Appointment Type to a Calendar Template12
- Enable a Calendar.....13
- Reset Password at Login14
- Viewing a Clinical Summary.....14
- Define a Clinical Summary Formatting Model.....14
- Create a User Setting Definition with Clinical Note Types and Formatting Models.....15
- Viewing the Complete Chart.....16
- Viewing Immunizations16
- Message Subtypes17
- Create a Message Subtype17
- Message Routing17
- Message Routing List18
- Provider Message Routing List19
- Import Practice Forms.....20
- Welcome Emails20
- Background Image20
- Configure the Patient Portal Settings21
- Performing Patient Portal Tasks26
- Patient Web Accounts27
- Create a Patient Account27
- Inactivate a Patient Account27
- Reactivate a Patient Account.....27

Responsible Party Web Accounts	28
Create a Responsible Party Account	28
Inactivate a Responsible Party Account	28
Reactivate a Responsible Party Account.....	29
Patient Contact Web Accounts.....	29
Create a Patient Contact Account in the 2016 Version	29
Create a Patient Contact Account in the 2016 Patch A Version.....	30
Inactivate a Patient Contact Account.....	30
Reactivate a Patient Contact Account	31
Assigning and Processing Patient Questionnaires	31
Assigning Questionnaires to Patients	31
Viewing a Patient's Completed Questionnaires	31
Updating Patient Demographic Data	32
Importing History Questionnaire Data	32
Processing Patient Messages	32
Message Filters	33
Process Appointment Request Messages.....	34
Process Refill Request Messages.....	34
Process Patient Question Messages.....	34
Approve Lab Results	35
Appointment Check In.....	35

Introduction

Aprima Patient Portal is a companion product to Aprima PRM. It enables secure web access to authorized patients so that they can perform the following activities.

- Update their demographic data
- Respond to medical history questionnaires
- View and request appointments
- Request prescription refills
- View and print their medical chart, including visit summaries, lab results, medications and medication allergies, immunizations, procedures, medical history, education forms
- View their ledger and statement
- Send and receive messages
- Make payments by credit card, if you are using the optional Easy Pay functionality

Patient access to Aprima Patient Portal requires nothing more than a JavaScript-enabled web browser and access to the Internet.

Data accessed through Aprima Patient Portal is secure, and all patient-identifying data is encrypted, and so cannot be compromised. Access is available only to patients and patients' responsible parties and other contacts whom you have authorized. You must establish user IDs and passwords for patients and their responsible parties and contacts in order for them to use your Aprima Patient Portal.

Patients only have access to their own data on the Patient Portal. Responsible parties have access to the data for all patients for whom they are responsible. Other patient contacts have access to the data for all patients for whom they are a contact. A person entered in your Aprima PRM database may be a patient, a responsible party for another patient (such as their child), and a patient contact for still another patient (such as their spouse or parent). You may grant that person access to the patient data for any or all of those patients. Access by responsible parties and patient contacts is subject to the patient's legal age of consent, if you have configured this, and whether permission for access has been granted.

Patients, responsible parties, and patient contacts to whom you have granted Portal access have read-only access to data from your Aprima PRM database. This means, for example, that patients can request an appointment, and the Portal will send a message to the user group assigned in Aprima PRM. Then an Aprima PRM user in your practice can make the requested appointment or contact the patient to determine another appointment time. The patient cannot make an actual appointment from the Patient Portal.

Likewise, when the patient requests a prescription refill, the Portal displays a list of prescriptions that have been written for the patient. The patient can select the prescription for which they want to request a refill, but they cannot print the prescription or change the prescription details in any way. A provider in your practice must review the refill request and, if approved, write the refill.

When patients complete demographic or history questionnaires, the data entered by the patient is stored separately, and is then sent to your Aprima PRM database as messages. The authorized Aprima PRM users who receive those messages process the messages to update patient demographic data and medical history records.

It is also important to note that when the patient completes their demographic information, they may select a pharmacy. The list of pharmacies displayed to the patient is the same list of pharmacies displayed to your Aprima PRM users. The pharmacy must be defined in your database in order for it to be available to the patient.

Payments on Portal

If you are using the optional Easy Pay credit card processing functionality, then you may enable patients to make a payment by credit card from the Portal. This creates a payment item (deposit) in your database. You must then process the payment to allocate money to superbills and charges.

Configuration

Technical configuration of your Aprima Patient Portal site will be done in conjunction with Aprima's implementation and support team. Once you are notified that configuration is complete, ensure that the port to be used for communication with Aprima Patient Portal is enabled for outbound traffic.

Data Security

The communication between your server and the Aprima Patient Portal server is encrypted using 256-bit AES. The Aprima Patient Portal server has an Authentication Certificate to verify credentials. SSL in the protocol prevents eavesdropping by any intermediate actors. The application also sends a tag for disabling local cache of the pages, which prevents the browser from writing the data out to files on the local disk.

Setting Up the Patient Portal

Setting up the Patient Portal is fairly quick and easy; however, there are a number of tasks involved. Depending on the activities that you want patients to be able to perform on the Portal, you may need to create one or more items in your Aprima PRM database to enable those activities. Once you have created all the needed items, then you can configure the Portal with those items.

The following tasks may be performed to set up the Patient Portal. The tasks are presented in a recommended order, but you may perform some tasks in a different order. Also, some tasks are optional depending on the activities you want to enable on the Portal.

1. Determine the activities you want to enable on the Portal, and the database items required to enable those activities. Use the table below to make these determinations.

Enable	Activity	Items Required
	Check in	
	Generate CCD document	
	Make a payment	Must be using the optional Easy Pay credit card processing functionality.
	Request appointment	<p>At least one appointment type enabled for patient requests.</p> <p>At least one calendar enabled for patient requests and using the appointment type that is enabled for patient requests.</p>
	Request assistance from the login page	
	Request prescription refill	
	Reset password from the login page	
	Send attachment messages	
	Send and receive messages	If desired, you can define message subtypes for the message type Patient Input.
	<p>Update demographics information and/or photo</p> <p>(This option is for demographics and other questionnaires.)</p>	System-defined questionnaires are available for use; you may define custom questionnaires.

Enable	Activity	Items Required
	View appointments	
	View clinical summary	<p>A document formatting model defined as a clinical summary and meeting clinical summary requirements.</p> <p>Optionally, a user setting definition with formatting models defined for various clinical note types. All formatting models selected for use on the Portal must be defined as a clinical summary and meet clinical summary requirements.</p>
	View complete chart	A complete chart print definition; no special requirements for use with Portal.
	View educational materials	
	View family history	
	View immunizations	At least one vaccine administration record; no special requirements for use with Portal.
	View lab test results	
	View medical history	
	View medication allergies	
	View medications	
	View patient ledger	
	View patient statement	
	View procedures	

2. Enable payments by credit card by defining a batch owner for the system-created financial batches for these payments. Note that Easy Pay itself must be configured for credit card payment processing.
3. Enable appointment requests, if desired, by defining at least one Appointment Type and at least one Calendar to be used for appointment requests, and then associating that calendar and appointment type using a calendar template.
4. Enable viewing of a clinical summary, if desired, by defining the Document Formatting Model for a clinical summary.

5. Enable viewing of the complete chart, if desired, by verifying an existing Complete Chart Print Definition or creating a new one specifically for use on the Portal.
6. Enable viewing of immunizations, if desired, by verifying an existing Vaccine Administration Record or creating one or more specifically for use on the Portal.
7. Configure the Patient Portal services and message recipients for the practice and individual providers, if desired.
8. Configure the email notifications that you want to send to patients.
9. Configure a custom background image for the Portal login page, if desired.
10. If desired, enter your state's legal age of consent for medical treatment to prevent access by a patient's responsible party or other contacts.
11. If desired, import forms that users can assign to patients to be completed.

Legal Age to Consent to Medical Treatment

You can configure the Patient Portal with your state's legal age of consent to medical treatment. The application uses this to determine whether a patient's responsible party or other contacts may access the patient's data through the Portal.

A nightly job determines when patients reach the age to consent, and disables the responsible party's Patient Portal access to all patient data. This job works slightly differently in the 2016 and 2016 Patch versions of the application. See the appropriate section below for the version you are using.


To use the legal age to consent to control Portal access to patient data, you must enter your state's legal age in the Portal settings and you must configure the job and activate the job schedule.

The nightly job, in conjunction with the Portal, disables responsible party and patient contact accesses for all patients who have reached the legal age or are older.

If you have special-needs patients or other patients of legal age who want someone else to have access to their medical information through the Patient Portal, you may flag the responsible party or patient contact web account so that they can retain access through the Portal.


Configure the Job

You must configure the Patient Portal Age Transition job with the user or user group to receive messages about the success or failure of the job.

1. List Editor icon () → Integration → Jobs
2. Select the Patient Portal Age Transition job, and select the Modify button.
3. Select the users or user groups to be notified when an error occurs in the processing of the job.
4. Select the OK button.

Activate the Job Schedule

You must activate the job schedule for the job to run.

1. List Editor icon () → System → Job Schedule
2. Select the Include Inactive Items checkbox, and select the Search button to display all active and inactive jobs.
3. Select the Patient Portal Legal Age To Consent Transition job schedule, and select the Modify button.
4. Deselect the Inactive checkbox.
5. Accept the default Repeat Parameters selections which specify when the job is to run.
6. Enter an ID and Notes, if desired.
7. Select the OK button.

Payments by Credit Card

To enable payments by credit card from the Patient Portal you must be enrolled with Easy Pay, and credit card processing must be configured in your database.

Once credit card processing is configured, you must define a batch owner for the system-created financial batches for these payments. Payment items created from the Portal appear in your database with all other payments. You will process these payments in the usual manner.

Please refer to the Credit Card Processing and the Configure Credit Card Payments from the Patient Portal sections of the *Administrative User's Guide* for more information.

Appointment Check In

When you configure the Patient Portal to enable patients to check in for appointments, check in is enabled only for one hour before through one hour after the scheduled appointment time.

Appointment Requests

In order for patients to request appointments through the Patient Portal, you must complete the following tasks.

1. Enable at least one appointment type for patient requests from the Portal.
2. Include the Portal-enabled appointment type on a calendar template.
3. Enable a calendar for patient requests from the Portal, and associate it to the calendar template that includes the Portal-enabled appointment type.

Patients will only be able to request appointments on calendars that are enabled for the Portal, and only for the appointment types that are enabled. This does not mean, however, that you have to enable all of your appointment types and calendars.

As you consider the appointment types, calendar templates, and calendars you want to use for the Patient Portal, remember that the patient may only request an appointment. The patient is not actually scheduling an appointment. A staff member will receive the patient's request, and then schedule the appointment using the appropriate calendar and appointment type. The staff member does not necessarily have to schedule the appointment on the calendar or with the appointment type available on the Portal.

Enable an Appointment Type

You must enable at least one appointment type for patient requests. Patients will only be able to request appointments for the appointment types that are enabled and then associated with a calendar through a calendar template.

1. List Editor (🌐) → Schedule → Appointment Type
2. Search for and select the desired appointment type. Select the Modify button.
3. Select the Allow Patient Requests checkbox to enable authorized patients to request appointments of this type from the web.

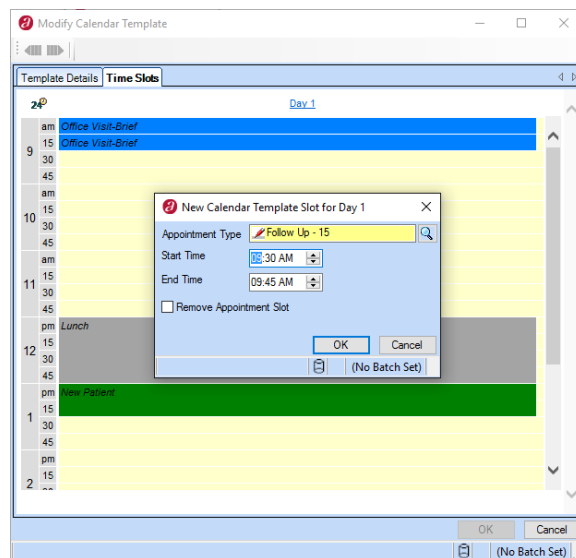
The screenshot shows a 'Modify Appointment Type' dialog box with the following fields and options:

- ID: F15
- Name: Follow Up - 15
- Duration: 15 minutes
- Color: orange
- Blocking:
- Allow Patient Requests:
- Group Visit:
- Notes: (empty text area)
- Inactive:
- Buttons: OK, Cancel, (No Batch Set)

Add the Patient-Request Enabled Appointment Type to a Calendar Template

The appointment type or types that you enabled for patient requests must be included on a calendar template that you will then apply to the calendar that you will enable for patient requests. Only the timeslots associated with the enabled appointment type will be available for patient requests.

1. List Editor (🌐) → Schedule → Calendar Template
2. Search for and select the desired calendar template, and select the Modify button.
3. Select the Time Slots tab to specify the patient-request enabled appointment type.
4. Assign an appointment type to a time slot, by selecting the desired time slot to display the Template Slot window.



- a. Select the Appointment Type which you have enabled for patient requests.
 - b. Select the Start Time and End Time.
 - c. Select the OK button to add the appointment type to the time slot.
5. Repeat step 4 to assign the appointment type to each time slot you want to enable for patient requests.

Enable a Calendar

You must enable at least one calendar on which authorized patients may request appointments. Authorized patients will only be able to request appointments on calendars that are enabled, and that are associated with a calendar template with time slots designated to an appointment type that is enabled for patient requests.

1. List Editor (🌐) → Schedule → Calendar
2. Search for and select the desired calendar. Select the Modify button.
3. Select the Calendar tab.
4. Select the Allow Patient Requests checkbox to enable authorized patients to request appointments on this calendar from the web.

The screenshot shows a 'New Calendar' dialog box with the 'Calendar' tab selected. The 'Calendar Template Assignment' section is active, displaying a list of calendar templates. The 'Alexander' template is selected. Below the list, the following fields are visible: 'Provider' (Alexander, Mark), 'Service Site' (Main), 'Start Time' (08:00 AM), 'End Time' (06:00 PM), and 'Display Interval' (15). The 'Allow Patient Requests' checkbox is checked. The 'Allow Appointment Overbooking' checkbox is also checked. The 'Inactive' checkbox is unchecked. The 'Show Provider on Scheduler' checkbox is unchecked. The 'Color' field is set to yellow. The 'Time Zone' field is empty. The 'OK' and 'Cancel' buttons are at the bottom right. A '(No Batch Set)' button is at the bottom center.

5. Select the Calendar Template Assignment tab.
6. Select the date on which you want the template to begin.
7. Select New Calendar Template Assignment from the popup menu.
8. In the New Calendar Template Assignment window:
 - a. Select the desired Calendar Template. This must be a template that includes time slots using a patient-request enabled appointment type.
 - b. Select the desired Recurrence Pattern.
 - c. Select the desired start and end dates for the Range of Recurrence. By default, the start date is today's date, and there is no end date.

Reset Password at Login

Patients and responsible parties have the ability to reset their password for the Patient Portal after logging in. You may also enable patients and responsible parties the reset a forgotten password when attempting to log in to the Patient Portal.

When passwords may be reset at login, then a user of the Patient Portal has the opportunity to select three security questions and enter answers for them. If the user forgets the password, then the user may enter the login ID and select the Reset Password link on the Patient Portal login window. If the user's login ID is valid, then the user's three security questions are displayed. If the user correctly answers all three questions, then the user can set a new password and log in to the portal.

The user is allowed three attempts to correctly answer the three security questions. If the user makes three attempts without correctly answering all three questions, then the login ID is inactivated and the user is not able to access the Patient Portal.

Viewing a Clinical Summary


You can use the Patient Portal to satisfy the requirements for MIPS and other quality program measures that require you to provide a clinical summary to patients within a certain amount time from a visit or a request for the summary.

To qualify as a clinical summary, the document must include diagnostic test results, problem list (diagnoses), medication list, and medication allergy list, and may include other information as appropriate. Please refer to the Clinical Summaries section for more information. The system-defined Checkout Plan formatting model meets these requirements, and it may be used for this purpose. Or, you may choose to develop your own clinical summary formatting model.

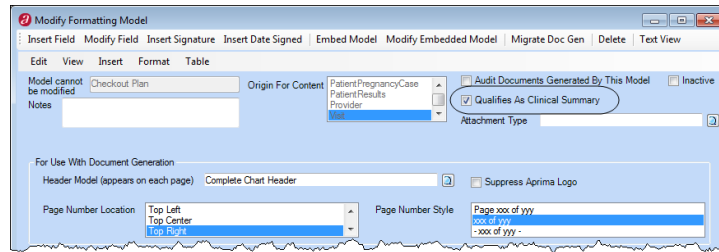
In your Patient Portal configuration, you must select a formatting model to be used as the default clinical summary document for all clinical note types. You may also select a user settings definition in which you associate document formatting models to be used for individual clinical note types. Any clinical note type that is not identified in the user setting definition will use the default formatting model.

Define a Clinical Summary Formatting Model

This document does not include complete instructions for creating a formatting model. For complete instructions, please refer to the Document Generation Formatting Models section of the *Administrative User's Guide*. Use this process to verify that the formatting model that you select for use in the Patient Portal is designated as a clinical summary.

1. List Editor () → Document Definitions → Formatting Model
2. Search for and select the desired formatting model, and then select the Modify button.

3. Make sure that the Qualifies As Clinical Summary checkbox is selected.



Create a User Setting Definition with Clinical Note Types and Formatting Models

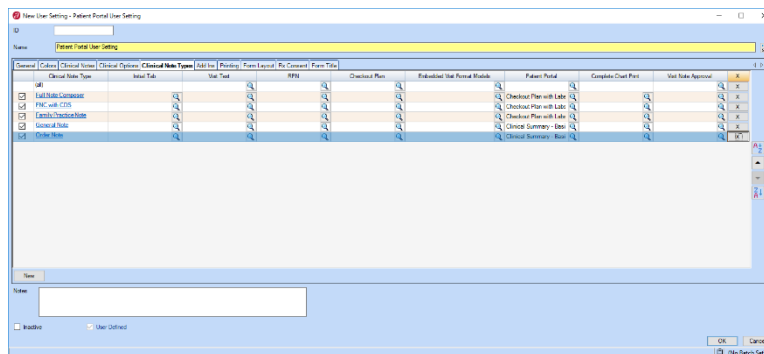
If you want to associate document formatting models to be used as clinical summaries for individual clinical note types, then it is recommended that you create a user setting definition specifically for the Patient Portal.

A user setting definition that is used only to identify formatting models for the Patient Portal does not need much of the other information that may be included in a user setting definition.

1. List Editor (🌐) → System → User Setting
2. Select the New button.
3. Enter a Name for the user setting definition.
4. Select the Clinical Note Types tab to define the clinical note type windows to which you want to associate a formatting model.

Note: You may want to increase the size of the window so that you can see more or all of the columns.

5. To add a clinical note type:



- a. Select the New button.
 - b. In the Find Clinical Note Type window, search for and select the desired clinical note type.
 - c. Select the OK button to return to the User Settings window.
6. To set the default for all the associated clinical note types, select the (All) row in the Patient Portal column, then select the desired formatting model.

7. To define a specific formatting model for a particular clinical note type, select the desired row, then:
 - a. Make sure that the checkbox at the far left of the clinical note type entry is selected.
 - b. In the Patient Portal column, select the formatting model to be used when a visit is printed from the Portal. A formatting model selected here must be defined as a clinical summary and meet clinical summary requirements. For the formatting models defined here to be used on the Portal, this user setting definition must be specified in your Patient Portal configuration.
8. Select the OK button to save the changes and close the window.

Viewing the Complete Chart

You can use the Patient Portal to satisfy the requirements for MIPS and other quality programs that require you to provide patients with electronic access to their health information. Some quality measures also require that patients view, download, or transmit their clinical summary to another provider.

You must configure the Patient Portal to enable patients to view their complete chart, and you must associate a complete chart print definition to the Patient Portal. You may use any complete chart print definition that you consider appropriate for your patients. The system-defined Portal Complete Chart which is and is designed specifically for the Patient Portal.

Patients may view, download, or transmit to a third party a clinical summary of their health information through the Patient Portal. Transmission to third-party providers is done via your Direct messaging functionality.

Viewing Immunizations

The Patient Portal uses a vaccine administration record to display a patient's immunizations, just like the Aprima PRM application uses a vaccine administration record to enable charting an immunization given or displaying the patient's immunization history. You may set up vaccine administration records for viewing adult and pediatric immunizations if desired. You may use on the Patient Portal vaccine administration records that have been defined for use within Aprima PRM, or you may define vaccine administration records specifically for use on the Portal. For example, you may want to define a vaccine administration record for the Portal that does not include all of the details that are included when an immunization is charted.

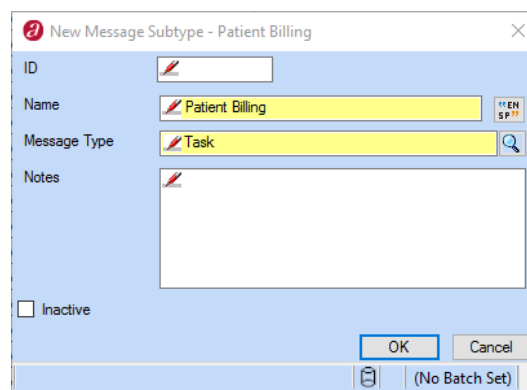
This document does not include instructions for creating a vaccine administration record. For complete instructions, please refer to the Vaccine Administration Record section of the *Administrative User's Guide*.

Message Subtypes

When a patient creates and sends a message from the Patient Portal to users in your practice, the message subtype is used as the subject line of the message. To make it easier for users to review and process messages from patients, you can define message subtypes for the message type Patient Input, and then configured them so that patients may create and send that type of message from the Patient Portal. You can also configure user group to receive the messages.

Create a Message Subtype

1. List Editor icon (🌐) → Messaging → Message Subtype
2. Select the New button.
3. Enter the name for the message subtype.



4. Using the Find icon, select the message type with which the subtype will be associated. Message types are system-defined in the application and may not be created or modified.
5. Enter an ID and Notes, if desired.

Message Routing

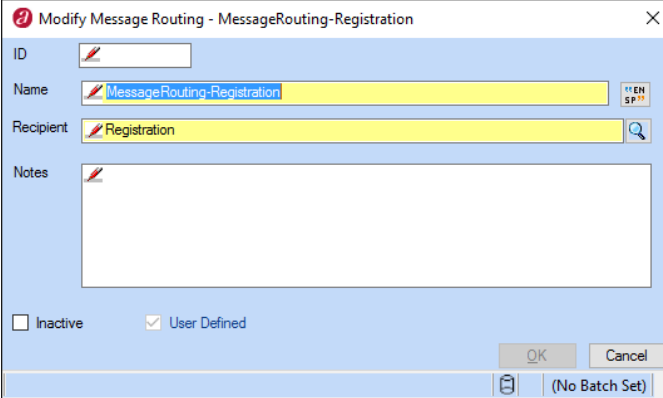
Message routing lists and provider message routing lists are used for system-generated messages for lab test orders and for messages generated by the receipt of Direct messages and Patient Portal messages. When the application generates or receives a message for one of these purposes, it determines the message recipients based on the message routing list.

A message routing list enables you to identify message recipients for a particular message purpose. A provider routing list enables you to identify message recipients for a particular provider for a particular message purpose. For example, you may want all lab test reminder messages to go to your reception staff members for follow up. In this case, you would use a message routing list. For messages generated by the receipt of Direct messages, you want the messages for different providers to be sent to different clinical staff members. So, for this case, you would use a provider routing list.

Message Routing List

A message routing list enables you to identify message recipients for a particular message purpose.

1. List Editor icon (🌐) → Messaging → Message Routing
2. Select the New button.
3. Enter the Name for the message routing list.
4. In the Recipient field, select the users or user groups to receive messages.



The screenshot shows a dialog box titled "Modify Message Routing - MessageRouting-Registration". It contains the following fields and controls:

- ID:** An empty text input field.
- Name:** A text input field containing "MessageRouting-Registration".
- Recipient:** A dropdown menu showing "Registration".
- Notes:** A large empty text area.
- Options:** Two checkboxes: "Inactive" (unchecked) and "User Defined" (checked).
- Buttons:** "OK" and "Cancel" buttons.
- Footer:** A status bar with a trash icon and the text "(No Batch Set)".

Provider Message Routing List

A provider message routing list enables you to identify message recipients for individual providers for a particular message purpose.

When using a provider message routing list, it is not necessary to identify every provider and their message routing preferences. You can assign a message routing list to the default provider entry. This default routing list will be used for any provider not specifically entered in the provider message routing list.

1. List Editor icon (🌐) → Messaging → Provider Message Routing
2. Select the New button.
3. Enter a Name for the message routing list.

The screenshot shows a dialog box titled "Modify Provider Message Routing - Routing List". It has a close button in the top right corner. The dialog contains the following elements:


- ID:** An empty text field.
- Name:** A text field containing "Routing List".
- Provider:** A list box containing "Default Provider", "Alexander, Mark", and "Patterson, Frank". "Patterson, Frank" is selected.
- Routing List:** A text field containing "MD Default Route" with a search icon to its right.
- Buttons:** "Add" and "Remove" buttons are located below the Provider list.
- Notes:** A large text area at the bottom left.
- Checkboxes:** "Inactive" (unchecked) and "User Defined" (checked).
- Bottom Right:** "OK" and "Cancel" buttons.
- Status Bar:** "(No Batch Set)" with a refresh icon.

4. Select the Add button under the Provider pane.
5. Search for and select the desired provider.
6. Add a routing list for the provider.
 - a. Select the provider in the Provider list.
 - b. In the Routing List field, search for and select the desired message routing list.
 - c. The users and user groups in the selected message routing list are displayed for the selected provider. These are the users and/or user groups to receive messages for this provider.
7. Repeat steps 4 through 6 for each provider.

Import Practice Forms

Practice forms are documents that can be assigned to patients with a Portal account. They may be forms that the patient is to fill out and return to you, instructions, or other information.

Use this process to create a practice form by importing a document file. Please note, you cannot use the File → Import to create a practice form.

1. List Editor icon () → Document Definitions → Practice Form
2. Select the New button.
3. Enter a Name for the form.
4. Select an Attachment Type.
5. Enter an ID and Notes if required.
6. Select the Import File button.
7. In the browser window, select the file type you wish to import. This may be:
 - An image file (.bmp, .gif, .jpg)
 - A text file (.txt)
 - A PDF (.pdf)
 - A Word document (.doc)
 - An XML file (.xml)
8. Navigate to the file that you wish to import.
9. Select the file, then select the OK button to return to the Education Form window.
10. Select the OK button to import the file into the application.

Welcome Emails

You may choose to send a welcome email to new patients. A welcome email is sent when a new patient record is created, and that record contains an email address for the patient. You may choose to send a welcome email to all patients or only to patients for whom you have identified in the patient record the provider in your practice who is primarily responsible for the patient's care.

You may also choose to send a Patient Portal welcome email to patients. This email is sent to a patient when you create a Portal account for the patient.

Background Image

A background image appears on the Portal login page, behind the login form. You can select an image file to use as background image if desired.

Configure the Patient Portal Settings

1. Tools → Configure Patient Portal Settings
2. Select the Consent tab.
3. In the Practice Consent Text field, enter your practice's consent statement for using the Patient Portal. This statement will be presented to the patient at the first login, and must be accepted before the patient is allowed access to any functionality.

This field limited to 1,000 characters. The following characters are not allowed: /, \, <, >, %, !, :, '#, "

The screenshot shows the 'Configure Patient Portal Settings' dialog box with the 'Consent' tab selected. The 'Practice Consent Text' field contains a sample consent statement: 'The patient portal is a secure way to access your medical records, medical history and account information through the internet. You can also communicate with our office via secure messaging to ask questions, provide information, request appointments, and request medication refills. Please read the following policy carefully. We are offering the patient portal as a convenience to you at no cost. We will not sell or give away any private information, including email addresses. The portal is for non-emergency uses only. We will reply to your request inquiry within two business days.' The 'Chart Consent Text' field contains 'Practice Consent - limited is 1000' and the 'Always Display Chart Consent' checkbox is checked. The 'Patient Portal Tag Line' field is empty, and the 'Patient Portal Internet URL' field contains 'https://gateway.aprima.com/portal/home/88888'. At the bottom, there are 'OK' and 'Cancel' buttons, and a '(No Batch Set)' button.

4. In the Chart Consent Text field, enter your practice's consent statement for accessing information from the patient's chart. This statement will be presented to the patient at login, and must be accepted before the patient is allowed access to those functions that display information from the patient's chart.

This field limited to 1,000 characters. The following characters are not allowed: /, \, <, >, %, !, :, '#, "

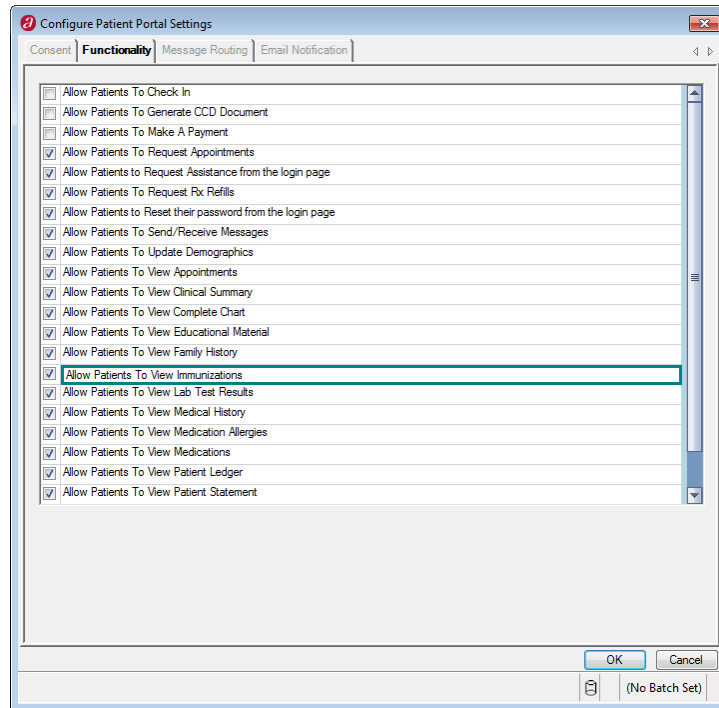
5. Either:
 - Select the 'Always Display Chart Consent' checkbox if you want your chart consent statement presented to the patient every time the patient logs in.
 - Deselect the 'Always Display Chart Consent' checkbox if you want your chart consent statement presented to the patient only the first time that the patient logs.
6. In the Patient Portal Tag Line field, enter a brief statement that will appear on the login window, if desired. This field limited to 100 characters. The following characters are not allowed: /, \, <, >, %, !, :, '#, "

7. In the Patient Portal Internet URL field, enter the following URL where *clientid* is your Aprima customer ID number.

<https://gateway.aprima.com/portal/home/clientid>

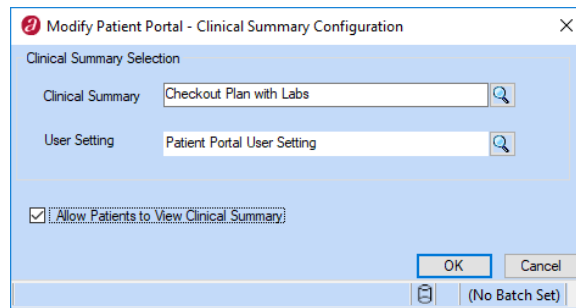
This field is available for use in document formatting models used to generate emails generated for patients using the Patient Portal.

8. Select the Functionality tab.
9. Select the checkboxes for the functionality that you want to enable for patients.



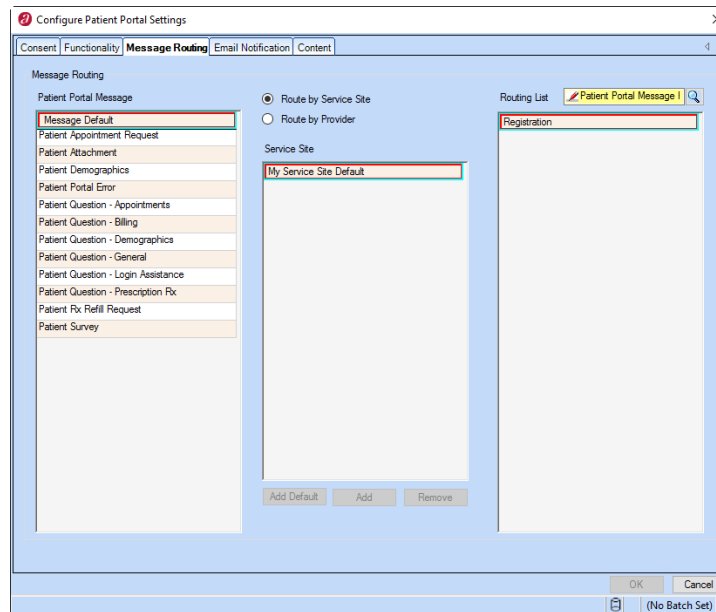
10. If you are using the optional credit card processing functionality, then you may select the 'Allow Patients to Make a Payment' checkbox.
11. When you select the checkbox for the 'Allow Patients to Send Attachment Messages' option, a popup window will appear so that you can configure the attachment messages.
 - a. Enter the Total Number of Files that can be attached to a message.
 - b. Enter the Maximum Size, in Kb, of an individual file.
 - c. Enter the Allowable File Extensions for attached files.
 - d. Select the Allow Patients to Send Attachment Messages checkbox.
 - e. Select the OK button.

12. When you select the checkbox for the 'Allow Patients To View Clinical Summary' option, a popup window will appear so that you can select the clinical summary document formatting model and user setting definition.



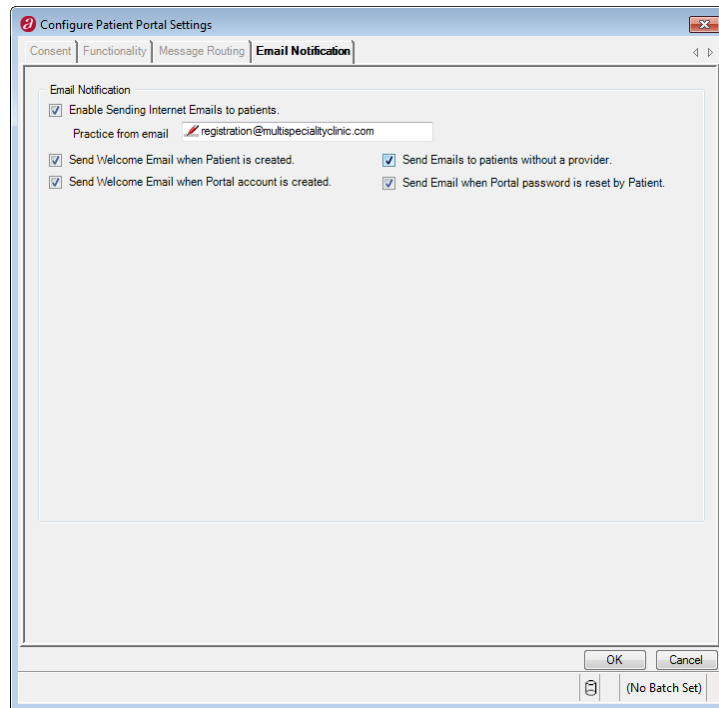
- a. In the Clinical Summary field, select the document formatting model that will be used as the default.
 - b. In the User Setting field, select the user setting definition that contains clinical note type and document formatting model associations.
 - c. Select the 'Allow Patients to View Clinical Summary' checkbox.
 - d. Select the OK button.
13. When you select the checkbox for the 'Allow Patients To View Complete Chart' option, a popup window will appear so that you can select the complete chart document formatting model that you want to make available to patients.
- a. Select the desired Complete Chart.
 - b. Select the 'Allow Patients to View Complete Chart' checkbox.
 - c. Select the OK button.
14. When you select the checkbox for the 'Allow Patients To View Immunizations' option, a popup window will appear so that you can select the vaccine administration records that you want to make available to patients.
- a. Select the desired Pediatric vaccine administration record
 - b. Select the desired Adult vaccine administration record.
 - c. Select the 'Allow Patients to View Immunizations' checkbox.
 - d. Select the OK button.
15. When you select the checkbox for the 'Allow Patients To Request Assistance from the Login Page' option, then you must also:
- a. On the Message Routing tab, set message routing for the Patient Question – Login Assistance entry.
 - b. On the Email Notification tab, verify that the Send Email When Portal Password is Reset by Patient checkbox is selected.

16. Select the Message Routing tab to define the recipients for messages received from patients as a result of their Portal activities.



- a. Select the radio button that identifies how you want to route messages.
 - Route by Service Site to route messages based on the service site identified in the patient's most recent visit note.
 - Route by Provider to route messages based on the provider identified in the patient's most recent visit note.
- b. In the Patient Portal Messages pane, select the message type you want to define.
- c. In the Service Site or Provider pane, select the appropriate button.
 - Add Default button: To add a default message route. Use this to route any messages not covered by a defined service site or provider routing list.
 - Add button: To add a service site or provider routing list.
 - Remove button: To remove the highlighted service site or provider routing list.
- d. With your selection highlighted in the Service Site or Provider pane, select the desired Routing List for this service site or provider.
- e. If available for the message type, select the "Allow Patient to Send Messages to PRM" checkbox to enable patients to send messages of this message type.
- f. Repeat substeps c through e for each service site or provider that you want to define for this message type.
- g. Repeat substeps b through f for each message type you want to define.

17. Select the Email Notification tab to define the patient Internet email settings. These practice settings can be overwritten at the provider level if desired.



- a. Select the Enable Sending Internet Emails to Patients checkbox if you want to send welcome and notification emails to patients.
- b. In the Practice From Email field, enter the email address from which all welcome and notification emails are sent. A valid email address will allow patients to reply. If you do not want patients to reply, then enter 'donotreply@youroffice.com'.
- c. Select the checkbox for each type of email message you want to send. You may send emails to patients:
 - When a new patient record is created and the patient record identifies the provider in your practice who is primarily responsible for the patient's care.
 - When a new patient record is created, but the patient record does not identify a provider in your practice who is primarily responsible for the patient's care.
 - When an account is created for the patient enabling them to access the Patient Portal.
 - When the Portal password is reset by the patient.

18. Select the Content tab to define your Portal appearance.

19. To change the login page background image:

- a. Select the Update Background Photo button. This opens the file search window.
- b. Search for and select the desired JPG file, and select the OK button.
- c. A popup message appears confirming your selection. Select the Yes button to confirm the image file.

- d. A popup message appears confirming the background image has been changed. Select the OK button to return to the Configure Portal Settings window.
20. In the Message Sub Heading field, type the message that you wish to appear on the message window. You might, for example, want to use this message to remind patients to use message for routine communication, not emergencies, or of whom to contact in an emergency.
21. In the Practice Name field, type your practice name as you wish it to appear on the Portal.
22. Define the legal age to consent to medical treatment, if desired.
 - a. To enable age validation, select the Require Legal Age to Consent checkbox.
 - b. Enter your state's Legal Age To Consent to medical treatment.
23. Select the OK button to save all of your Portal configuration changes.

Performing Patient Portal Tasks

You, as a member of the practice, will not perform any tasks on the Patient Portal itself. Patients, and in some cases, patients' responsible parties, will use the Patient Portal to perform the activities that your practice has enabled. Many of the activities that patients can perform require that you perform a related task within Aprima PRM for the patient action to be initiated or completed.

The tasks to be performed are determined by the activities enabled on your Patient Portal, but may include any of the following.

- Create Patient Portal users
- Assign questionnaires
- Process completed questionnaires
- Process messages received from patients
 - Appointment request messages
 - Prescription refill request messages
 - General messages
- Send messages to patients
- Approve lab results

Patient Web Accounts

Create a Patient Account

When you create a new Patient Portal account for a patient, the application uses the patient's email address as the account ID, if an email address is available. If the patient record does not include an email address, then the ID is the patient's first and last name. You can change the default ID to anything you or the patient prefer.

When creating the patient account, the application generates a random password for the account. You can accept that password, or generate another random password, but you cannot define a specific password. Once the user logs into the account, the user may define a specific password. The password must be at least five characters.

1. Patient Demographics → Questionnaire tab
2. Select the Create Web Account button.
3. Enter a logon name for the patient or accept the default name.
4. Accept the randomly generated password, or select Reset Password to generate another password.
5. Select the OK button.

Note: If a patient forgets the password, you may reset it using step 3.

Inactivate a Patient Account

You may inactive a patient's account for the Patient Portal if needed. A patient's account is distinct from the patient record. You may inactivate the account for an active patient record. You may also inactivate the patient record, but allow the patient's account to remain active. This enables a patient who has left your practice, for example because they have moved or because treatment is complete, to continue to access the Patient Portal for their medical information.

1. Patient Demographics → Questionnaire tab
2. Select the Reset Web Account button.
3. In the Patient Web Account window, select the Inactivate button.
4. Select the OK button.

Reactivate a Patient Account

1. Patient Demographics → Questionnaire tab
2. Select the Activate Web Account button.
3. In the Patient Web Account window, select the Reset Password button. Write down the password so that you can give it to the patient.
4. Select the OK button.

Responsible Party Web Accounts

When the responsible party is someone other than the patient, such as a parent, then you may give the responsible party a Patient Portal account. This enables the responsible to access the patient's information and take action on the patient's behalf, such as responding to questionnaires and requesting prescription refills.

You cannot restrict a responsible party's access to the patient's medical information on the Portal. Therefore, if an adult patient has someone else as their responsible party, then you must make sure that the patient has granted their responsible party access to their medical information before you create a Portal account for the responsible party.

Information from a visit note that is marked as a private visit is not available on the Portal when the Portal user is the responsible party. A visit note may be marked as private for any number of reasons, but it is most frequently used for visits that include sexual activity information on a minor. Restricting access to this information on the Portal enables you to keep information confidential with the patient and not shared with the patient's parents.

Create a Responsible Party Account

1. Patient Demographics → Account tab
2. Select the Account name hyperlink.
3. In the Account window, select the Allow Web Access to Patient Data checkbox.
4. If the patient has reached the legal age of consent but this contact is allowed access to the patient's medical data, then select the Ignore Patient Age checkbox.

Note: This option is only available in the 2016 Patch A version of the application.

5. Select the Create Web Account button.
6. Enter a logon name for the responsible party or accept the default name.
7. Accept the randomly generated password, or select Reset Password to generate another password.
8. Select the OK button.

Inactivate a Responsible Party Account

You may inactive a responsible party's account for the Patient Portal if needed. A responsible party's account is distinct from the responsible party record and from the patient record. You may inactivate the account for an active patient record. You may also inactivate the patient record, but allow the patient's or the responsible party's account to remain active. This enables a patient who has left your practice, for example because they have moved or because treatment is complete, to continue to access the Patient Portal for their medical information.

1. Patient Demographics → Account tab
2. Select the Account name hyperlink.
3. In the Account window, select the Reset Web Account button.
4. In the Responsible Party Web Account window, select the Inactivate button.

5. Select the OK button.

Reactivate a Responsible Party Account

1. Patient Demographics → Account tab
2. Select the Account name hyperlink.
3. In the Account window, make sure the Allow Web Access to Patient Data checkbox is selected.
4. Select the Activate Web Account button.
5. In the Responsible Party Web Account window, select the Reset Password button. Write down the password so that you can give it to the patient.
5. Select the OK button.

Patient Contact Web Accounts

You may create a Portal account for any patient contact if desired. This enables the contact to access the patient's information from the Patient Portal. (Please note that the process for creating a patient contact depends upon the version of the application you are using.)

You cannot restrict a contact's access to the patient's medical information on the Portal. Therefore, you must make sure that the patient has granted the contact access to their medical information before you create a Portal account for the contact.

Information from a visit note that is marked as a private visit is not available on the Portal when the Portal user is a patient contact. A visit note may be marked as private for any number of reasons, but it is most frequently used for visits that include sexual activity information on a minor. Restricting access to this information on the Portal enables you to keep information confidential with the patient and not shared with the patient's parents or guardians.

Create a Patient Contact Account in the 2016 Version

Use this process to create a Portal web account for an existing patient contact entry.

1. Patient Demographics → Contacts tab
2. Select the desired contact entry.
3. In the Contact window, select the Allow Web Access to Patient Data checkbox.
4. Select the Create Web Account button.
5. Enter a logon name for the contact or accept the default name.
6. Accept the randomly generated password, or select Reset Password to generate another password.
7. Select the OK button.

Create a Patient Contact Account in the 2016 Patch A Version

Use this process to create a Portal web account for an existing patient contact entry.

1. Patient Demographics → Contacts tab
2. Select the desired contact entry.
3. In the Contact window, identify the patient medical information that the contact is authorized to receive.
 - a. Select the appropriate radio button.
 - b. If you selected the Only or the Except radio button, then select the information type or types that are allowed (for Only) or not allowed (for Except).
 - c. Enter notes regarding information release if needed.
4. Create a Portal account:
 1. Select the Allow Web Access to Patient Data checkbox.
 2. If the patient has reached the legal age of consent but this contact is allowed access to the patient's medical data, then select the Ignore Patient Age checkbox.
 3. Select the Create Web Account button.
 4. Enter a logon name for the patient or accept the default name.
 5. Accept the randomly generated password, or select Reset Password to generate another password.
 6. Select the OK button.
8. In the Contact window, select the OK button to save the contact record. The contact is listed on the Contacts tab of the Patient Demographics window.

Inactivate a Patient Contact Account

You may inactivate a patient contact's account for the Patient Portal if needed. A contact's account is distinct from the contact record and from the patient record. You may inactivate the account for an active patient record. You may also inactivate the patient record, but allow the patient's or the contact's Portal account to remain active. This enables a patient who has left your practice, for example because they have moved or because treatment is complete, to continue to access the Patient Portal for their medical information.

1. Patient Demographics → Contacts tab
2. Select the desired contact entry.
3. In the Contact window, select the Reset Web Account button.
4. In the Person Web Account window, select the Inactivate button.
5. Select the OK button.

Reactivate a Patient Contact Account

1. Patient Demographics → Contacts tab
2. Select the desired contact entry.
3. In the Contact window, make sure the Allow Web Access to Patient Data checkbox is selected.
4. Select the Activate Web Account button.
5. In the Person Web Account window, select the Reset Password button. Write down the password so that you can give it to the patient.
5. Select the OK button.

Assigning and Processing Patient Questionnaires

Assigning Questionnaires to Patients

You must associate one or more defined questionnaires to a patient in order to collect history data from that patient. Note that the patient demographics questionnaire is predefined and automatically associated with the patient's Portal account; you do not have to associate it to the patient.

1. Patient Demographics → Questionnaire tab
2. Select the Add button.
3. In the Questionnaire Name field, select the desired questionnaire.
4. Enter the Start Date, or accept the default of today's date. The start date is the first date the patient will be able to access the questionnaire.
5. If desired, enter an Expiration Date. The patient will not be able to access the questionnaire after this date if one is entered.
6. If desired, select the One Time Questionnaire to limit the patient's access to the questionnaire to until you have imported the data.

Viewing a Patient's Completed Questionnaires

You can see whether a patient has completed a questionnaire from the Patient Demographic window's Questionnaire tab. Once a questionnaire is completed, you can view the patient's questionnaire responses by selecting the date on which the questionnaire was completed.

The patient questionnaire details display in a new window. The information includes:

- A summary section, which provides a snapshot of the patient's final answers.
- A history section, which is an audit log that shows details of the contents of each question every time the patient accessed it. This shows all changes made before the questionnaire was completed.

Updating Patient Demographic Data

When a patient has updated any demographic information, the recipients named in the Message Routing tab of Configure Practice Settings will receive a Patient Demographic Changes message.

To process the message, open the message and review the demographic information. You can:

- Accept the information, which updates the patient's demographic record with the new information and closes the message as complete.
- Reject the information, which closes the message as complete. No action is taken on the information.

You must accept or reject all of the changes; you cannot accept or reject individual changes or additions made by the user.

Importing History Questionnaire Data

Once the patient has completed a history questionnaire, the provider may import the data from Full Note Composer, Superbill Composer, or Patient History.

1. Select the Import Questionnaire () icon from the toolbar.

Note: If the Import Questionnaire icon is not visible, select the drop down button on the toolbar to display additional icons.

2. All patient input from all questionnaires is imported into the History. Fields containing patient input are highlighted as defined in User Options.
3. Verify the patient input by selecting the highlighted field. The input is now considered approved.
4. If desired, make changes or additions to the patient input.

Processing Patient Messages

Patient input messages are created by Patient Portal functions that may be performed from the Patient Portal. Patient input messages are created when a user or the application sends a message to a patient, and when a patient sends a message to your practice from the Portal.

When a message is sent to a patient, either on-demand by a user or automatically by the application, an email message is sent to the patient's email address. The email message simply informs the patient that a message has been sent to their Patient Portal account. The patient must log into the Portal to read the actual message.

When a patient sends a message to your practice, that message is received as message in the Aprima PRM application. The patient's message appears in the Message Center or the Desktop message panel, depending on your message filtering criteria.

Message Filters

The table below shows the types of messages that may be received from patients, and the message subtype for each. The messages that you receive from patients will depend upon the activities that are enabled on your Patient Portal.

Users who will receive and process messages from patients should include the Patient Input message type and appropriate subtypes in their current message filters or create new filters for patient messages. For example, you may want to include prescription refill requests from patients in a filter for all requests. You may want to create a specific filter for patient survey messages.

Messages sent by patients that cannot be correctly routed based on the Portal's message routing configuration are sent to the Unassigned Messages user group. By default, Administrators and Clinical Administrators have rights to messages sent to this group. You may add or remove users and groups as needed. Users should create or modify a message filter so that these messages are seen and processed regularly.

Message	Message Subtype
Appointment request messages	Patient Appointment Request
Appointment question messages	Patient Question – Appointments
Attachment	Patient Attachment
Billing question messages	Patient Question – Billing
Clinical decision support rule reminder	Patient Clinical Decision Support Reminder
Demographics input messages	Patient Demographics
Demographics question messages	Patient Question – Demographics
Family history questionnaire	Patient Family History
General question messages	Patient Question – General
Lab orders	Patient Service Order
New patient account	Patient Internet Email - New Patient Account
New portal account	Patient Internet Email - New Portal Account
Prescription refill request messages	Patient Rx Refill Request
Prescription question messages	Patient Question – Prescription Rx
Portal errors	Patient Portal Error
Questionnaire messages	Patient Questionnaire
Recall messages	Patient Recall

Message	Message Subtype
Welcome messages	Patient Welcome Message - Practice Default Patient Welcome Message - Provider Override

Process Appointment Request Messages

When a patient requests an appointment through your Portal, the request is sent as a message to the recipient of appointment request messages. The message is identified as "Patient Appointment Request" on the Desktop or Message Center. The body of the message includes the request details.

To process the message:

1. Select the Book Appointment button to access the Appointment window.
2. Create the appointment for the patient as appropriate.
3. Select the Complete button to complete the message.
4. As appropriate, call or send a message to the patient with the appointment details.

Process Refill Request Messages

When a patient requests a prescription refill request through your Portal, the request is sent as a message to the recipient of patient prescription refill request messages. The message is identified as "Patient Rx Refill Request" on the Desktop or Message Center.

Patient prescription refill messages are similar to prescription refill messages created by users of the application, and they processed in the same way.

Once you process the refill message, you may want to call or send a message to the patient letting them know whether the refill request has been processed.

Process Patient Question Messages

Patients can send a number of different types of messages, including appointment questions, billing questions, prescription questions, and general questions. The messages are sent to the recipient of the message type. The message is identified as "Patient Question -" on the Desktop or Message Center. The body of the message includes the message text.

To process the message:

1. Type your response to the patient in the text box.
2. Select the Reply button.
3. Select the Complete button to complete the message.

Approve Lab Results

If your Patient Portal is set up to display lab results, then all approved results are available to patients. Lab results that are not approved are not available to patients through the Portal.

Lab results that you want to discuss with a patient before the patient can view them on the Patient Portal must remain unapproved until you have spoken with the patient.

Appointment Check In

When the Patient Portal is configured to enable patients to check in for appointments, check in is enabled only for one hour before through one hour after the scheduled appointment time.