![Veradigm logo]

FollowMyHealth® v24.2

Personal Health Record

User Guide

www.veradigm.com

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Chapter 1

Supported browsers

The FollowMyHealth® Personal Health Record supports the current versions of the following modern web browsers:

- Microsoft® Edge®
- Mozilla Firefox® (for all functionality except video visits)
- Google Chrome™
- Apple® Safari®

Transport Layer Security 1.2 (TLS 1.2) requirement

FollowMyHealth requires browsers with Transport Layer Security 1.2 (TLS 1.2) to verify that your data is sent securely between your health record and the provider's application.

If you navigate to FollowMyHealth and are not using a browser that supports TLS 1.2 or that does not have TLS 1.2 enabled, an error message indicates that you cannot connect to the website if your browser is outdated. You can access FollowMyHealth after upgrading to a browser that supports TLS 1.2.

Use the following links to download the latest versions of impacted browsers:

- **Mozilla Firefox®**
- **Google Chrome™**
- **Apple® Safari®**

FollowMyHealth is compliant with Web Content Accessibility Guidelines (WCAG) 2.0, Level A.

Chapter 2

Get started as a new FollowMyHealth Personal Health Record user

Create your new FollowMyHealth® account by using one of three methods. Each method includes step-by-step instructions to get started.

Create a new FollowMyHealth® account:

- Through an email invitation
- From the FollowMyHealth Personal Health Record sign-in page
- As an authorized individual providing support for another patient, such as your parent or child

Create a FollowMyHealth account

Before you can use the FollowMyHealth Personal Health Record, create a FollowMyHealth Sign-In username and password.

 identifies where to sign in with your FollowMyHealth Sign-In.

When you create your new FollowMyHealth account, the email address associated with your account or that your organization has on record for you is used automatically as your FollowMyHealth Sign-In's username.

Alternative sign-in methods

As a best practice, use your FollowMyHealth Sign-In to access your FollowMyHealth account. Alternatively, you can also sign in using the following account credentials, if available:

- Apple ID
- Cerner
- Facebook
- Google
- Microsoft®

These alternative methods are offered as a convenience to reduce the number of credentials you must manage. The alternatives are used only to sign in to the FollowMyHealth Personal Health Record. Information in your FollowMyHealth account is never shared, posted, or exchanged with these services.

Sign-in methods are managed in the FollowMyHealth Personal Health Record at **My Account > Preferences > Sign In Preferences**. See the related task, "Manage alternative sign-in options" for more information.

> **Note:** If you forget your username or password for the alternative sign-in account, you cannot recover it from your FollowMyHealth account.
> You must keep your FollowMyHealth Sign-In connected to your FollowMyHealth account even if you do not use it. All alternative methods can be removed, but you cannot remove your FollowMyHealth Sign-In.

Two-factor authentication

Two-factor authentication is an optional security feature that you can add to your sign-in process. This verification provides a second layer of security to protect your FollowMyHealth account. Enable two-factor authentication after your account is created. See the related topic, **Two-factor authentication** on page 65 for more information.

Related concept information
Two-factor authentication on page 65
Related task information
Manage alternative sign-in options on page 70

Create a FollowMyHealth account through an email invitation

Your healthcare provider sends you an email invitation with a personalized link to the FollowMyHealth sign-in page. Do not share this link with others.

Before you begin

Create a username and password which will be your FollowMyHealth username and password. As a best practice, use these credentials to sign in to your FollowMyHealth account. The

FollowMyHealth section is identified by .

1. Open the email invitation that was sent by your healthcare provider or organization.
2. In the email, click **Click here to begin registration**.
3. Click **Sign Up and Connect**.
4. Enter your email address if it is not already displayed.

> **Note:** Alternatively, you can enter a username other than an email address.

Your credentials are immediately validated. If the guidelines are not followed, a ![x] and a message are displayed in a red bold font, indicating the guideline that was not followed.

5. Enter and confirm your new password.

6. Click **Confirm and Continue**.

7. Click **Next**.

8. Read the terms of service and click **I Accept**.

> **Note:** You must accept the terms of service to use the FollowMyHealth Personal Health Record.

9. Enter the invitation code that you received in the email from your healthcare provider or organization and click **Next**.

> **Note:** The code is usually the last four digits of your Social Security number or your birth year. For some organizations, the code might be your full date of birth (mmddyyyy). If you do not know your invitation code, contact the healthcare provider or organization that invited you.

10. Click **I Accept**.

The Request for Access (RFA) permits FollowMyHealth to obtain and store your medical information from the healthcare organization. You must accept this request to:

- Connect to the healthcare organization.
- View your medical information from that organization.
- Interact with your providers at the organization through email messages, appointment requests, and prescription renewal requests.

The RFA text might be modified or updated at any time. When you sign in to the FollowMyHealth Personal Health Record and the RFA has been updated, **Request for Access** opens. You must click **I Accept** to accept the updated RFA and stay connected to the organization and continue to view your medical information. If you click **Decline**, you must confirm that you want to decline the RFA. Declining the RFA stops your ability to receive health record updates and interact with providers from the organization.

Results of this task

Your new account is created and connected to the healthcare provider or organization that sent you the email invitation.

View pending connections at **My Account > Connections**.

Create a FollowMyHealth account without an email invitation

If you did not receive an invitation from your provider, but want to use the FollowMyHealth® Personal Health Record, you must create an account from the FollowMyHealth sign-in page.

Before you begin

The username and password that you create are your FollowMyHealth Sign-In username and password. As a best practice, use these credentials to sign in to your account. The FollowMyHealth Sign-In section is identified by ![icon] .

1. Go to **www.followmyhealth.com/patientaccess** or the URL that was provided by the healthcare provider or organization.

   The FollowMyHealth sign-in page opens.

2. Click **I need to sign up**.

3. Enter an email address for **Notifications Email**.

   Specify an email address where you can receive notifications regarding your health record.

   This email address is also your username. The **Create Username** box fills automatically with an email address when you create a username and password.

   After you create your account, this same email address is listed under **My Info > Demographics > Contact Information**.

4. Complete all required fields:

   - **First Name**
   - **Last Name**
   - **Date of Birth**
   - **Zip Code**
   - **Home Phone Number** (**Optional**)
   - **Social Security Number** (**Optional**)

5. Click **Confirm and Continue**.

6. Read and accept the terms of service.

   > **Note:** You must accept the terms of service to use the FollowMyHealth Personal Health Record.

7. Enter your email address if it is not already displayed.

   > **Note:** Alternatively, enter a username other than an email address.

8. Enter and confirm your new password.

9. Click **Confirm and Continue**.

10. Search for organizations to connect to your account.

    Search automatically fills the field based on the ZIP Code that you used on **Sign Up and Connect**. You can also search by organization or by provider.

11. (Optional) Click **Skip This Step** to skip connecting to organizations.

    Verify that you do not want to search for connections and the FollowMyHealth Personal Health Record **Home** tab opens.

12. Click **Connect** adjacent to the organization to which you want to connect.

    > **Note:** You can add multiple connections.

13. Click **Next**.

    > **Important:** You must accept a request for access for each organization to which you want to connect.

14. Click **I Accept**.

    > **Note:**
    >
    > The organization to which you want to connect might require patient identification verification. If the organization requires this verification, **Patient Identification Authorization** opens instead of **Your Connection Request is Pending**.
    >
    > Continue with the following steps to verify your identification. After the following steps are complete, **Your Connection Request is Pending** opens.
    >
    > a. Click **I Agree** to authorize the organization to verify your identification.
    >   After you agree to the authorization, the text under the date is saved as a document and sent to your health record. The document is listed in the **Documents** tab.
    >
    > b. Enter the requested information for the account holder:
    >   Information that you provided on **Sign Up and Connect** fills some of these fields automatically.
    >
    >   • **First Name**
    >   • **Last Name**
    >   • **Middle Name** (**Optional**)
    >   • **Suffix** (**Optional**)
    >   • **Date of Birth**

- **Social Security Number** (**Optional**)
- **Email** (**Optional**)
- **Primary Phone** (**Optional**)
- **Street**
- **City**
- **County**
- **ZIP Code**

   c.   Click **OK**.

       Answer a series of questions. Click **Next** to open subsequent questions.

   d.   On the last question, click **Finish**.

15. Click **Continue**.

 The FollowMyHealth Personal Health Record opens.

 Your healthcare organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization. Some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your FollowMyHealth account contains only the demographic information that you provided when you created your account.

 A new account is created and connected to an organization. View your pending connections at **My Account > Connections**.

Create a FollowMyHealth account and connect to another patient account as an authorized individual

If you assist dependent patients, such as your parents or children, with aspects of their healthcare, consider becoming an authorized individual with access to their FollowMyHealth® account.

Before you begin

Obtain an emailed authorized individual invitation to the FollowMyHealth Personal Health Record from your dependent's healthcare provider or organization.

The username and password that you create are your FollowMyHealth username and password. As a best practice, use these credentials to sign in to your account. The FollowMyHealth section is identified by .

1. Open the email invitation from your dependent's healthcare provider or organization.

2. In the email, click **Click here to become an Authorized User**.
3. Click **Sign Up and Connect**.
4. Enter the required information.

   The boxes are filled automatically with information from your provider. Complete any empty boxes and correct filled information as needed.

   • **Notifications Email**
     Enter an email address where you can receive notifications regarding your health record. This email address is also used as your username. The **Create Username** box is filled automatically with your email address when you create a username and password.

     After you create your account, this email address is listed under **My Info > Demographics > Contact Information**.

   • **First Name**
   • **Last Name**
   • **Date of Birth**
   • **Zip Code**
   • **Home Phone Number**
   • **Social Security Number**

5. Click **Confirm and Continue**.
6. Read and accept the terms of service.

   > **Note:** You must accept the terms of service to use the FollowMyHealth Personal Health Record.

7. Enter a username.

   Consider using your email address that you entered in **Create Username**.

   > **Note:** As you enter data into the boxes, the application validates the content. If the guidelines for the data are not followed, a and message are displayed.

8. Enter and confirm your new password.

   > **Note:** Do not enter a username and password that is already associated with a current FollowMyHealth account.

9. Click **Confirm and Continue**.
10. Click **Next**.
11. Enter the invitation code from the email you received when you requested authorized individual access, and then click **Next**.

Because you are setting up an authorized individual account for another patient, the code is typically the last four digits of that patient's Social Security number or the patient's birth year. For some organizations, the code might be the patient's full date of birth (mmddyyyy). If you do not know the invitation code, contact the healthcare provider or organization that invited you.

The Request for Access (RFA) page is displayed the first time that you register as an authorized individual for a patient. Subsequent authorized individual registrations do not require this step.

12. Click **I Accept**.

You must accept the RFA when you first sign on to FollowMyHealth.

The RFA permits FollowMyHealth to obtain and store the medical information for the patient that you are supporting.

After you connect, you can:

- Connect to the patient's healthcare organization.
- View the patient's medical information from that organization.
- Interact with the patient's providers at the organization through email messages, appointment requests, and prescription renewal requests.

If the RFA is updated, you must accept the RFA again. When you sign in to FollowMyHealth and the RFA is updated, **Request for Access** opens.

13. Click **I Accept**.

The patient's health record uploads to your FollowMyHealth account and the FollowMyHealth Personal Health Record opens.

14. Click **Hello *Your Name*** at the top of the page.

The patients for whom you are an authorized individual are listed.

15. Click a patient's name to open the FollowMyHealth account .

View pending connections at **My Account > Connections**.

Email and mobile phone verification

FollowMyHealth® uses your email address or mobile phone number, if available, to send you notifications, text messages, or recover sign-in information.

If needed, the email address or mobile phone number that you associate with your FollowMyHealth account is verified so that you receive these important communications.

> **Note:** When an authorized individual views **Action Center** items for a patient, the items for adding a mobile phone number or verifying the email

address are not displayed. These items are never displayed for an authorized individual sign-in only patient. Authorized individuals are not allowed to change the email address or mobile phone number on a patient's account.

Verify your email address

Verify the email address on your account to receive important communications and use as a backup method to recover your sign-in information.

The email address on your FollowMyHealth® account is verified automatically when you:

- Join FollowMyHealth from an email invitation.
- Add a connection from an email invitation and the invite email matches the email on your account. If the invite email does not match the email on your account, the email on your account is retained.

The email address on your FollowMyHealth account is not verified automatically when you:

- Join FollowMyHealth without an email invitation
- Join FollowMyHealth from a text message through FollowMyHealth's Mobile Patient Experience

If the email address on your account is not verified, an **Action Center** item appears: **You haven't verified your email.**

To address this **Action Center** item:

1. Click the **Action Center** item.

   You cannot dismiss this item from the **Action Center**.

   After entering your email address, a verification code is sent to your email address.

2. Enter the verification code to verify your email address.

   The **Action Center** item is removed when the email address is verified.

   > **Note:** If you do not receive a verification code, click **Resend verification code**.

3. (Optional) Send your email address change to one or more of your connected organizations.

   Send your demographic updates with your email address changes to one or more of your connected organizations, if available. All available organizations are displayed alphabetically and are selected by default.

4. (Optional) You can cancel the verification process, if needed.

If you cancel, your changes are not saved and you will have to start over.

What to do next

As an additional reminder when your current email address is not yet verified, click **Verify your email** in **My Info**, **Communication Preferences**, or **My Reminders**. After you verify your email address, this link changes to **Change**.

> **Note:** The entry of **Email Verified** events is added to the user's **Activity History** under **My Account > Preferences**.

Verify your mobile phone number

Verify the mobile phone number on your account to receive important text messages and use as a backup method to recover your sign-in information.

If you do not have a verified mobile phone number on your account, an **Action Center** item appears: **Add your mobile phone number**.

1. Click the **Action Center** item.

   A verification code is sent to your mobile phone number.

2. Enter the verification code to verify your mobile phone number.

   The **Action Center** item is removed when your mobile phone number is verified.

   > **Note:** If you do not receive a verification code as a text message, click **Resend verification code**

3. (Optional) Send your mobile phone change to one or more of your connected organizations.

   Send your demographic updates with your mobile phone number changes to one or more of your connected organizations, if available. All available organizations are displayed alphabetically and are selected by default.

4. (Optional) You can cancel the verification process, if needed.

   If you cancel, your changes are not saved and you will have to start over.

   > **Note:** When a mobile phone number has been added and verified, a **Mobile Phone Added** event is added to the **Activity History Log**, under **My Account > Preferences**.

Chapter 3

Sign in to your FollowMyHealth account

Several options are available to sign in to your FollowMyHealth® Personal Health Record account.

As a best practice, sign in with your FollowMyHealth Sign-In username and password. However, you can also configure your account to sign in by using an alternative method if you currently use an Apple ID or if you have a Cerner Health, Facebook, Google, or Microsoft® account. You can associate the username and password for these alternative accounts to avoid remembering multiple sets of credentials.

Connect your account to a new organization or another account as an authorized individual.

If you sign into your FollowMyHealth Personal Health Record account using the **https://www.followmyhealth.com/** URL, you are redirected to **https://about.followmyhealth.com/**, where you can learn more about the benefits of FollowMyHealth and Mobile Patient Experiences for patients and providers. On the **About FollowMyHealth** page, click **LOG IN / SIGN UP**, where you can sign in and bookmark the page. Otherwise, if you sign in to your organization FollowMyHealth Personal Health Record (for example *provider*.followmyhealth.com), you are not redirected to the **About FollowMyHealth** page.

Accept updated Terms of Use

When updates are made to the Terms of Use, you must accept the revised terms the next time that you sign in to FollowMyHealth®.

Before you begin

> **Important:** Terms of Use must also be accepted by new users who sign up for FollowMyHealth without an invitation. When you decline, you can choose to act on it later and you will be logged out of FollowMyHealth. If you confirm declining the Terms of Use, you can either delete the account or export your health records for your personal use before deleting your account.

1. Enter your FollowMyHealth username and password.
2. Click **Sign In**.

   If the Terms of Use has been updated, they are displayed for you to accept or decline.

> **Note:** If you are an existing FollowMyHealth user, an updated **Terms of Use** window is displayed which includes **Why am I seeing this** text. After you accept the Terms of Use, you are presented with options to configure your communication preferences.
> If you are a new user, the **Why am I seeing this** text is not displayed. Accept the **Terms of Use** and proceed to the **Home** page, where you see an Action Center item to review in the communication preferences. When you click this action item, email is automatically selected for **FollowMyHealth** and **Third Party Notifications**, however, text messaging is not selected.

3. To accept the Terms of Use, click **I Accept**.

   After you accept the Terms of Use, the **Communication Preferences** is displayed. If you are a new user, then this page does not display.

   On the **Communication Preferences** page, you can select or clear notification options. By default the **Email** option is selected for **Notifications about FollowMyHealth** and **Notifications about 3rd Party Partners**. If you want to be notified through text messaging of important information regarding FollowMyHealth and third-party partners (for products and services), select **Text Message**. You can select text message notification even if you do not have a valid mobile number associated to your account, but text messages are not sent until you add a valid mobile number. To change these settings at any time, navigate to **My Account > Preferences > Communications Preferences**.

   > **Note:** The **Terms of Use** page times out due to inactivity after five minutes. If this happens, then you are signed out of FollowMyHealth and must repeat these steps.

4. (Optional) To decline acceptance, click **I Decline**.
   Are you Sure? displays.

   Read the on-screen instructions before selecting an option.

5. If you decline, you have the following options:

   - Click **I'm sure I want to decline**.
     If you select this option, then you have the following three options:

     — Click **I'll do this later**.
       If you select this option, then you are signed out of FollowMyHealth. The next time you sign in, you are prompted again to accept the Terms of Use.

     — Click **No, Delete Account without Exporting Health Records**. Follow the on-screen instructions, then click **Delete Account** or click **Cancel**.

     — Click **Yes, Export Health Records**.

Follow the on-screen instructions, then click **View Terms of Use** or click **Cancel**.

- Click **I'll do this later**.
  If you select this option, then you are signed out of FollowMyHealth. The next time you sign in, you are prompted again to accept the Terms of Use.

- Click **View Terms of Use** to review and accept before exporting your health records. Click **Cancel** to be returned to the **Delete** page.

> **Note:** After you click **View Terms of Use**, **Communication Preferences** displays where you can select or clear notification options. By default the **Email** option is selected for **Notifications about FollowMyHealth** and **Notifications about 3rd Party Partners**. If you want to be notified through text messaging of important information regarding FollowMyHealth and third-party partners (for products and services), select **Text Message**. You can change these settings at any time by navigating to **My Account > Preferences > Communications Preferences**.

Sign in with FollowMyHealth username and password

Sign in to the FollowMyHealth® Personal Health Record as an existing user after you register and have a FollowMyHealth username and password.

1. Access your provider's FollowMyHealth sign-in page using one of these methods:

   - Use the URL that was sent by your provider.
   - Use the default FollowMyHealth URL at
     `https://www.followmyhealth.com/patientaccess.`

2. Enter your FollowMyHealth username and password.
3. Click **Sign In**.

Two-factor authentication

If you have two-factor authentication enabled for your account, a verification code is sent to you using your preferred method. Enter the verification code to complete the sign-in process.

After your FollowMyHealth® username and password are accepted, you are redirected to an additional sign-in page to enter your verification code. This code is sent to you either by email, text message, or a third-party authenticator application, depending on how you configured two-factor authentication in your account. For more information about configuring two-factor authentication, see the related concept, "Two-factor authentication".

You are limited to three attempts to enter a valid verification code. After three failed attempts, an error message is displayed and your account is locked for five minutes. An email is sent to your account informing you of unusual activity. If you switch authentication methods before your account is locked, you receive an additional three attempts to enter your verification code. Switching methods does not reset the number of attempts for your original method.

You can request a new verification code to be sent by email or text message if you did not receive or could not find the first code that was sent. This option is not available if you use the third-party authenticator application method. You are limited to three resend requests. At the fourth resend request, an error message is displayed and your account is locked for five minutes. An email is sent to your account informing you of unusual activity.

If your account becomes locked due to too many failed sign-in attempts, a message informs you why your account is locked the next time that you attempt to sign in during the lockout period. You can still access your account by using the password reset or username recovery workflows.

You can regain access to your account if you no longer have access to your current two-factor authentication method without having to contact Support (for example, if you lost access to your email or phone).

- If your current two-factor authentication method is by email, you can receive the code by text if you have a verified mobile phone number on your account.
- If your current two-factor authentication method is by text, you can receive the code by the email address on your account.
- If your current two-factor authentication method is by a third-party authenticator application, you can receive the code by the email on your account or by text if you have a verified mobile phone number on your account.

Related concept information
Two-factor authentication on page 65

Recover your FollowMyHealth username

If you cannot remember your FollowMyHealth username, recover your information by using one of the following methods:

- From the FollowMyHealth sign-in page:
  Click **Forgot your username** on the FollowMyHealth sign-in page to start the username recovery process. See the link below to the related task, "Recover your username from the FollowMyHealth Personal Health Record sign-in page" for instructions.

  > **Note:** If your account is deleted either by you or the practice administrator, your associated FollowMyHealth username is also deleted. It is still available for reuse if you sign up for a new account and use the previous FollowMyHealth username.

- From the **Sign Up and Connect** page:
  Click **Forgot your username** on **Sign Up and Connect** to start the username recovery if you connect to another account with a patient invitation. See the link below to the related task, "Recover your username from the Sign Up and Connect page" for instructions.

- Access the original confirmation email
  When you initially created your FollowMyHealth account, a confirmation email was sent with the subject, **Success! Your username was created**. Locate that email to find your username.

  To find the email in your Inbox or other folders, search on the following items:

  — The email is sent from "noreply@followmyhealth.com".
  — The subject of the email is **Success! Your username was created**.

- Contact your healthcare organization's support
  A support representative can send your username to the email account associated with your FollowMyHealth account.

- Access Help from the FollowMyHealth sign-in page.

Related task information

Recover your username from the FollowMyHealth sign-in page

Use the **Forgot your username link** on the FollowMyHealth sign-in page to recover your FollowMyHealth account username.

If you use third-party credentials to sign in to the FollowMyHealth Personal Health Record, such as an Apple ID, Cerner, Facebook, Google, or Microsoft®, you cannot recover the username. You must have an FollowMyHealth account to recover your username. If you do not have a FollowMyHealth username, you are prompted to create one during the following steps.

1. Open the FollowMyHealth sign-in page.
2. Click **Forgot your username**.
3. Enter information that matches the information you entered when you originally created your account.
4. Select **I'm not a robot** and complete the security step.
5. Click **Continue**.

   Your identity is verified with a text or email message. A code is sent through a text message to the mobile phone number on the account or an email message is sent to the email address that is associated with your account.

   The mobile phone number must be a verified number. If you do not have a verified phone number with your FollowMyHealth account, the text message option is not available.

   If you do not have access to text or email messaging, select **I don't see an option that will work** and contact technical support.

6. Select a verification method and click **Continue**.
7. Check your email or text messages for the verification code.

   If you do not receive a code, or need a new code, click **Resend verification code** or **What if I didn't receive a code**. A code is resent up to three times. If you do not remember your code the third time, your account is locked for five minutes.

   An email message notifies you when you make the maximum number of attempts to resend the code. You are locked from username recovery for five minutes.

   If you remember your username, you can sign in even if you were locked out from username recovery.

   After five minutes, you can attempt to recover your username again.

8. Enter the verification code.

   A page opens with your username.

   You can also reset your password from this page. If you do not change your password, when you click **Continue**, the sign-in page opens with your username filled automatically. If you do change the password, you are signed-in directly when you click **Continue**.

If you use third-party credentials to sign in, such as Facebook, Google, Cerner, Microsoft®, or Apple® you cannot recover your username and a page opens. Update the FollowMyHealth username and password from this page.

Your email address becomes your FollowMyHealth username. Enter a password and click **Continue** to sign in to the FollowMyHealth Personal Health Record.

Check for an email verification notifying you that your username is recovered or created.

Recover your username from the Sign Up and Connect page

If you received an invitation by email and want to add another connection to your FollowMyHealth Personal Health Record account, but you forgot your username, you can recover your username from **Sign Up and Connect**.

If you use only third-party credentials to sign in to FollowMyHealth, such as Apple ID, Cerner, Facebook, Google, or Microsoft®, you cannot recover your username, but you can use the **Forgot your username** link to find your account and create a new FollowMyHealth username. If you do not have a FollowMyHealth username, you can create one during the following steps.

1. Open the email account that is associated with your FollowMyHealth Personal Health Record account.
2. Locate the patient invitation email that you received to add the new connection.
3. Click the email invitation link.
4. Click **Sign in and add this connection**.
5. Click **Forgot your username**.
6. Enter information that matches the information when you originally created your account.
7. Select **I'm not a robot** and complete the security step.
8. Click **Continue**.

    Your identity is verified with a text or email message. A code is sent through a text message to the cell phone number on the account or in an email message to the email address associated with your account.

    The cell phone number must be a verified number. If you do not have a verified phone number with your FollowMyHealth Personal Health Record account, the text message option is not available.

    If you do not have access to text or email messaging, select **I don't see an option that will work** and contact technical support.
9. Select a verification method and click **Continue**.
10. Check your email or text messaging for the verification code.

If you do not receive a code, or need a new code, click **Resend verification code** or **What if I didn't receive a code**. A code can be resent up to three times. If you do not remember your code the third time, your account is locked for five minutes.

An email message notifies you when you make the maximum number of attempts to resend the code. You are locked from trying to recover your username for five minutes.

If you remember your username, you can sign in even if you were locked out from username recovery.

11. Enter the verification code.

   You can also reset your password from this page. If you do not change your password, **Welcome** opens when you click **Continue**. Your username is entered automatically and you can continue the registration process for the new connection.

   If you use an alternative method to sign in, such as with Apple®, Cerner, Facebook, Google, or Microsoft® credentials, you cannot recover your username and a page opens to update the sign-in credentials to use FollowMyHealth.

   Your email address becomes your FollowMyHealth username. Enter a password and click **Continue** to sign in to the FollowMyHealth Personal Health Record.

   Check for an email notification that your username is recovered or created.

Reset your FollowMyHealth password

Reset your FollowMyHealth password from the FollowMyHealth sign-in page.

1. Go to the FollowMyHealth sign-in page.
2. Click **Forgot your password**.
3. Enter your username, respond to the CAPTCHA authentication request, and click **Continue**.

   Your username is required to reset your password. If you forgot your username, see the link below to the related reference topic, "Recover your FollowMyHealth username".

   You must also respond correctly to the CAPTCHA authentication request as an additional way of validating your identity.

   A message indicates that a verification code was sent to the email address associated with your FollowMyHealth username (not your personal health record Inbox).

4. Check your email for the verification code.

   If you do not receive a code, or need a new code, click **Resend verification code**. A code can be resent up to three times. If you do not remember your code the third time, your account is locked for five minutes. An email message notifies you when you make the maximum number of attempts to resend the code or enter the correct code.

5. Enter the verification code.

> **Note:** After 10 minutes of inactivity, a message indicates that you will be signed out in 30 seconds. If you click **OK**, the sign-out is canceled and the session is renewed. Otherwise, the session ends and you are redirected back to the FollowMyHealth sign-in page.

6. For **Enter New Password**, enter a password.
7. For **Confirm New Password**, reenter the password.
8. Click **Continue**.

   You are signed in successfully to your FollowMyHealth account. Check your email for a message notifying you that your password is changed.

Related reference information

Sign in with an alternative authentication method

If you currently use Apple® ID, or have a Cerner Health, Facebook, Google, or Microsoft® account, you can use the username and password that is associated with these accounts with your FollowMyHealth account.

Before you begin

As a best practice, use the FollowMyHealth Sign-In authentication method for signing in to the FollowMyHealth Personal Health Record. These third-party sign-in methods are offered as an alternative to remembering new credentials and are used only to sign in to FollowMyHealth. Information within FollowMyHealth is never shared, posted, or exchanged with these services.

1. Access your provider's FollowMyHealth sign-in page using one of these methods:

   - Use the URL provided by your provider
   - Go to `https://www.followmyhealth.com/patientaccess`

2. Click the link: **or, use an alternative**.

   > **Note:** Your most recent authentication method is retained. For example, if you sign in using an alternative method, the alternative option is displayed automatically as the default sign-in method the next time that you sign in.

3. Click your preferred authentication method.

A message indicates that you are first directed to the third-party authentication page to sign in, and then redirected back to FollowMyHealth.

4. Click **OK**.
5. Enter your username and password to sign in.
    The FollowMyHealth Personal Health Record opens.

Connect your account to a different organization through an email invitation

If another provider or organization sends an email for you to connect to FollowMyHealth and you already have a FollowMyHealth account, you can connect your existing account to the new organization.

Before you begin
You must have an email invitation from the organization to join FollowMyHealth. The organization sends you an email invitation with a registration link to `www.followmyhealth.com`. The individualized link opens the FollowMyHealth sign-in page.

This process connects your existing FollowMyHealth account with a new organization. Information from this organization is then available in your FollowMyHealth account.

1. Go to the email inbox that is associated with your FollowMyHealth account.
2. Open the email invitation that was sent by the new provider or healthcare organization.
3. In the email, click the **Click here to begin registration** link.
4. Click **Sign in and add this connection**.
5. Enter your existing FollowMyHealth account credentials.

> **Note:** The date of birth is validated when you sign in. If the date of birth associated with the account credentials entered does not match the date of birth associated with the account to which you want to connect, **Date of Birth Does Not Match** opens. Verify that the date of birth matches on both accounts to prevent your health record from uploading to an account that does not belong to you.

6. Click **Confirm and Continue**.
7. Click **Next**.
8. Enter the invitation code that you received in the email, and then click **Next**.

> **Note:** The code is usually the last four digits of your Social Security number or your birth year. If you do not know your invitation code, contact the healthcare organization that invited you.

The request for access (RFA) permits FollowMyHealth to obtain and store medical information from the organization. If you decline, you are not connected to the organization, you cannot view your medical information from that organization, and you cannot interact with your providers at the organization through email messages, appointment requests, and renewal requests.

The RFA might be updated at any time, and you must accept the updated RFA to continue accessing your health record. When you sign in to FollowMyHealth and the RFA is updated, **Request for Access** opens. You must click **I Accept** to accept the updated RFA and stay connected to the organization to view your medical information. If you click **Decline**, you must confirm that you want to decline the RFA. Declining the RFA prevents you from receiving health record updates and interact with providers from the organization.

9. Click **I Accept** to release your healthcare record to FollowMyHealth.
10. Monitor the retrieval progress to verify that patient data from the new organization is uploaded successfully to your account.

   When the upload is complete, your account is connected and the FollowMyHealth® Personal Health Record opens. You should see patient data in your account from the new organization.

Connect your account to another account as an authorized individual

If a patient, such as your child, an elderly parent, or other dependent, requires an authorized individual to help monitor and manage their health, their healthcare organization can send an email invitation to you so that you can connect your account as an authorized individual with the patient's health record in FollowMyHealth.

Before you begin
The dependent patient's organization sends you an email invitation with a registration link to `www.followmyhealth.com`. The individualized link opens the FollowMyHealth sign-in page.

1. Go to the email inbox that is associated with your FollowMyHealth account.
2. Find and open the email invitation that was sent by the provider or healthcare organization.
3. In the email, click the **Click here to become an Authorized User** link.
4. Click **Sign in and add this connection**.

> **Note:** As you enter data into the boxes, the application validates the
>
> content. If the guidelines for the data are not followed, a ![red X icon] and
> message is displayed.

5. Enter your existing FollowMyHealth account username and password, and then click **Confirm and Continue**.

6. Click **Next**.

7. Enter the invitation code that you received when you requested authorized individual access and click **Next**.

> **Note:** If you are setting up an authorized individual account for a dependent child or adult, the code applies to that patient and is the last four digits of their Social Security number or birth year.

> **Note:** The Request for Access step occurs the first time that you register as a patient's authorized individual. Subsequent authorized individual registrations do not include this step.

You must accept the request for access (RFA) the first time you connect with FollowMyHealth.

The RFA permits FollowMyHealth to obtain and store the medical information for the patient for whom you are an authorized individual. If you decline, you are not connected to the organization, you cannot view the patient's medical information from that organization, and you cannot interact with the patient's providers at the organization through email messages, appointment requests, and renewal requests.

The RFA might be updated at any time, and you must accept the updated RFA again. When you sign in to FollowMyHealth and the RFA is updated, accept the RFA to stay connected to the organization and view medical information. If you decline the RFA, you must confirm that you want to decline the RFA. Declining the RFA prevents you from receiving health record updates or interacting with providers from the organization.

8. Click **I Accept**.

9. Click **I Accept**.

The patient's health record is uploaded to your FollowMyHealth account. After the dependent patient's health record is retrieved, the FollowMyHealth Personal Health Record opens.

10. Click **Hello** *Your Name* in the static toolbar.

11. Click the name of the account holder for whom you are an authorized individual.

The patient's FollowMyHealth account opens.

Limited sign-in attempts

Several methods are in place to verify the security of the sign-in process for FollowMyHealth®.

"reCAPTCHA" check required after six failed sign in attempts

If you attempt to sign in to FollowMyHealth and fail to enter the correct username or password six times, an error message is displayed on the sign in page and you must pass a "reCAPTCHA" check to continue attempting to sign in.

You are allowed six additional attempts to sign in. If you are still unsuccessful, you are blocked from further sign-in attempts in the current browser session. You must close the browser or open a new browser tab to start a new session and a new set of sign-in attempts.

Account temporarily locked after six failed sign in attempts

If you fail to sign in to a valid FollowMyHealth account after six attempts, the account is temporarily locked for 20 minutes. While this lock is in effect, you are not allowed to sign in.

The user who is associated with the username is sent an email notifying them of an unusual number of attempts to sign in, and that their account is locked. This locked is removed if you recover your username or reset your password successfully.

Entering passwords correctly

The following features help to verify that you enter your account password correctly for a valid username:

- To avoid mistyping a case-sensitive password, a tooltip is displayed if your Caps Lock is on while you type in the password field. This tooltip is hidden when you turn Caps Lock off or navigate away from the password field.
- Click **Show Password** next to the password field to view the hidden password, and verify that the password is correct. Click the icon again to hide the password.

Sign in by Inbound SSO

FollowMyHealth currently supports inbound single sign-on (SSO), which maps an identifier from an external source system (such as your healthcare organization's web site) to your FollowMyHealth account, so the next time that you sign in from the source system your FollowMyHealth account is loaded automatically without having to sign in again.

You must have previously signed in to the external source system initiating the SSO, and the system must support user accounts and manage the identities of users who use inbound SSO.

If you attempt to launch FollowMyHealth from the source system but you do not already have a FMH account, additional data from the source system can be used (if supported) to initiate the invitation process to allow you to sign up as a new FMH user and add a connection to the organization.

> **Note:** This is not required, but is just another option to help you more easily create a FMH account if needed and sign in faster. This capability relies on the source system to authenticate you as the patient and pass to FMH all the information required to complete the invitation process.

For more information, contact your organization to ask if they support the SSO method to access FMH accounts.

Chapter 4

Static toolbar

The static toolbar is displayed at the top of the FollowMyHealth Personal Health Record page and is available from all FollowMyHealth pages and tabs. The toolbar contains links to common and often used tasks.

Figure 1: Static toolbar
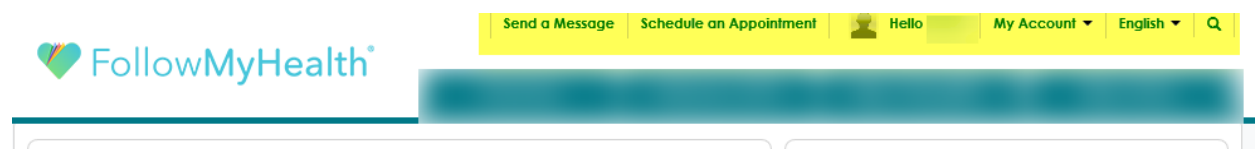
From the toolbar, you can perform the following tasks:

- Send a secure message to a provider.
- Schedule an appointment.
- View your own patient information or information for another patient if you are an authorized individual.
- Access information about your account, including:
    — Demographic and contact information
    — Connections to healthcare organizations
    — Billing information
    — Account preferences that you can configure
    — How to contact FollowMyHealth Support and access online help
    — Sign out of the application
- Change the personal health record language between English and Spanish.
- Perform searches on the FollowMyHealth Personal Health Record.

Sending messages

Compose a secure FollowMyHealth message to any connected provider who has enabled messaging. This option is displayed only if you are connected to a provider with enabled messaging.

For more information about sending secure messages, see the link below to the related topic, "Compose a secure message."

Related task information

Switching the account view

You can switch the FollowMyHealth Personal Health Record view between your signed in user account information and other accounts for which you are an authorized individual.

Click **Hello** and switch the FollowMyHealth Personal Health Record view to another account for which you have access.

Managing your account

Manage account connections, billing, and **My Info** preferences from **My Account** on the static toolbar.

You can also access **Support** and **Help** and sign out of the FollowMyHealth Personal Health Record from **My Account**.

My Info

The **My Info** tab contains your demographic information, including basic information, emergency contacts, insurance details, and the person who is responsible for your account.

My Info features separate tabs for **General**, **Emergency Contact**, **Responsible Party**, and **Insurance** information. Click these tabs to update and maintain your demographic information on your account.

General information

The **General** tab contains basic information about your account, including your name, date of birth, Social Security Number, contact information, and more.

Some of the information in **General > Basic Information**, such as contact information, name, date of birth, and address might already be completed based on the information that your healthcare organization has recorded for you.

Access your account's general information from the **Home** page by clicking **My Account > My Info > General**.

Edit name, DOB, and SSN

Maintain your full and preferred names, date of birth, and Social Security Number in this section of the **General** tab.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Name/DOB**, enter or modify the following information:

   Preferred Name
   This name replaces the default first name from your health record in the FollowMyHealth Personal Health Record and in email communications.
   Your preferred name does not replace your default first name in the required Request for Access (RFA) document that you accepted during account creation. This document, which is located in your **Documents** tab, remains unchanged.

   First Name
   The default for your first name on your health record.

   Middle Name
   Your middle name, if available.

   Last Name
   Your last name.

   Date of Birth
   Your date of birth. Click the field to select your birth date from the calendar.

   Social Security Number (Optional)
   Your full Social Security Number in `xxx-xx-xxxx` format.

   > **Note:** As you enter your Social Security number, your entry is masked until you select the view button ( ) to review your entry. After you save your changes, navigate away from this page and then return, the field is masked until you select the view button to unmask and display only the last four digits.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

What to do next

After you save the updated information, you must sign out of the FollowMyHealth Personal Health Record for the changes to occur. When you sign back in, the name that you entered for **Preferred Name** is displayed in various areas of the FollowMyHealth Personal Health Record. These areas include:

- The **Hello** greeting at the top of the FollowMyHealth Personal Health Record
- The **Summary** tab
- The **Messages** tab

Your preferred name is also included on email messages that are sent:

- For prescription refills
- For appointment reminders
- For scheduled appointments
- To you by providers using EHR application

Edit birth sex, sexual orientation, and gender identity

Maintain your birth sex, sexual orientation, and gender identity in this section of the **General** tab. These settings are optional.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Birth Sex / Sexual Orientation / Gender Identity**, enter or modify the following information:

   Birth Sex
   Select from the following options:

   - Male
   - Female
   - Unspecified

   Sexual Orientation
   Select from the following options:

   - Straight or heterosexual
   - Lesbian, gay, or homosexual
   - Bisexual
   - Don't know
   - Choose not to disclose

- Other, please describe
  You can choose not to disclose this information. If you select this option, you can add more details in the **Please Describe Here** box which is displayed.

Gender Identity

Select from the following options:

- Male
- Female
- Transgender Male / Female-to-Male
- Transgender Female / Male-to-Female
- Genderqueer, neither exclusively male nor female
- Choose not to disclose
- Other, please describe
  You can choose not to disclose this information. If you select this option, you can add more details in the **Please Describe Here** box which is displayed.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit address

Maintain your address information in this section of the **General** tab.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Address**, enter or modify the following information:

Country

Select your country from the list. The country that you select affects the display of other address fields.

Address Line 1

The first line of your street address.

Address Line 2

The second line of your street address, if needed.

City

The city in your selected country where you live.

State

 The state in your selected country where you live. This field is not shown for all countries.

Country Subdivision

 The subdivision in which you reside. This field is shown for Australia and Foreign/Unlisted countries.

Province

 The province in which you reside. This field is shown for Canada.

County

 The county in which you reside. This field is shown for United Kingdom.

Zip Code

 Your 5- or 9-digit zip code. This field is not shown for all countries.

Postal Code

 Your postal code. This field is shown for Australia, Canada, and Foreign/Unlisted countries.

Post Code

 Your post code. This field is shown for United Kingdom.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit social information

Maintain your social information, including race, ethnicity, and language, in this section of the **General** tab.

This information is requested as part of a federal requirement. If you are not comfortable providing this information, you can choose to decline.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Social Information**, enter or modify the following information:

Race

 Select your ethnicity from the available list. If you prefer not to provide this information, select **Declined to Answer**.

Ethnicity

Select your ethnicity from the available list. If you prefer not to provide this information, select **Declined to Answer**.

Language

Select your primary language from the available list. If you prefer not to provide this information, select **Declined to Answer**.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit contact information

Maintain your email address and phone number contact information in the **General** tab and synchronize the change with other areas of the FollowMyHealth Personal Health Record where your contact information is listed.

Your email address is also listed in:

*   The **Communication Preferences** tab
*   Your FollowMyHealth® Sign In preferences
*   The **Goals** tab in **Wellness**

When you change the email address in one of these locations, the change is synchronized to all locations.

1. Sign in to FollowMyHealth Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Contact Information**, enter or modify the following information:

Email

The email address that you specified when you created your account is listed here by default. Click **Change** to specify another email address.

a. Click **Continue**.
    A verification code is sent to the new email address.

b. Enter the verification code to verify your email address.

> **Note:** If you do not receive a verification code, check your junk mail folder, verify that a valid email address is entered correctly, and click **Resend verification code**.

c. Click **Verify Email**.

d. Send your email address change to one or more of your connected organizations.

Mobile Phone

This phone number is used for text message notifications, two-factor authentication, if enabled, and recovering your sign in information if you forget your username.

a. Click **Add a mobile phone number**.

b. Enter your phone number.

c. Click **Continue**.
A verification code is sent to your mobile phone.

> **Note:** If you do not receive a verification code, click **Resend verification code**.

d. Enter the **Verification Code** and click **Verify Mobile Phone**.

e. You are asked if you want to send this change to any or all of your connected organizations. Select or clear applicable organizations as needed and click **Send** or **Don't Send**.

f. To remove a mobile phone number from your account, click **Remove**.

> **Note:** If you have two-factor authentication enabled using the **Text Message** option, it is turned off when you remove the mobile phone number.

Home Phone

Add or remove your home phone number as needed.

Work Phone

Add or remove your work phone number as needed.

4. Click **Save**.

5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit your preferred pharmacy

Find a pharmacy using your current location or one near your home address. You can also browse a list of mail order pharmacies or search by pharmacy name, city, or ZIP Code. If you use the same pharmacy for most of your prescription orders, maintain your preferred pharmacy information in this section of the **General** tab.

You can also edit your preferred pharmacy from **My Health > Medications**.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > General** to display the basic information for your account.
3. Under **Preferred Pharmacy**, click **Edit**.

   By default you see a list of pharmacies near your current location sorted by distance.

   You can filter to only show pharmacies open 24 hours or expand your search radius up to 100 miles. Pharmacies are labeled as:

   - **Retail**
   - **Specialty**
   - **Mail Order**
   - **Long-term Care**
   - **24 Hours**

   The name, address, primary phone number and distance from your current location displays. Click **Get Directions** to open Google Maps™. Directions from your current location to the pharmacy will be provided.

   > **Note:** You must enable **Location Services** in your browser to use **Near Me** tab.

   Mail order pharmacies are included in the results if they are within the selected radius from your current location.

4. Select **Near My Home** to view a list of pharmacies near your home address sorted by distance.

   > **Note:** Distance between your location and the pharmacy is calculated as a straight line that is rounded to the nearest tenth of a mile.

   You must have a valid home address in your FollowMyHealth account to view this tab. Clicking **Get Directions** shows you directions from your home to the pharmacies in Google Maps™.

5. Select the **Mail Order** tab to view a list of all mail order pharmacies.

   > **Note:** You cannot filter 24 hour pharmacies within this tab.

   Click **Get Directions** to obtain the pharmacy address in Google Maps™, however, directions are not available from your current location.

6. Select **Advance Search** to find a specific pharmacy by name, city, or ZIP Code.

   Pharmacy name and city search uses fuzzy matching so results display even if you misspell the name. The results are sorted by relevance.

   > **Note:** ZIP Code requires a five-digit number to search. Pharmacies matching the ZIP Code are returned. You can search for 24 hour

pharmacies in **Advance Search** but you must select that option before you search.

Click **Get Directions** to obtain directions to the pharmacy in Google Maps™.

Pharmacy data is updated nightly. Pharmacies must be active to appear in the search results.

> **Note:** This search functionality is not yet available on the FollowMyHealth Mobile app.

7. Select a pharmacy form the resulting list and click **Connect**.

   Your preferred pharmacy is added to your account information.

   Your preferred pharmacy is listed on the FollowMyHealth® Personal Health Record on the **Home** tab under **Health Summary** or under **My Health > Medications** tab.

   If the preferred pharmacy is no longer active, an (**Inactive**) indicator is displayed and you can no longer use that pharmacy for prescription renewals or other actions in which that pharmacy is required. You must select another pharmacy.

8. Click **Save**.

9. Click **Send** to send a message to your provider about updates made to your demographic information.

What to do next

Click **Send** to send an email communication to your provider about this demographic update.

Edit emergency contact

The **Emergency Contact** tab lists the person who your healthcare organization should contact if an emergency occurs when you are with your healthcare provider.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > Emergency Contact**.
3. Enter information in **Name**, **Address**, and **Contact Information** or update the existing information.

   Some of the information might already be completed based on the information that your healthcare organization has recorded for you.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit responsible party

The **Responsible Party** tab shows the person who is responsible for any charges that are incurred with the healthcare organization. This person is also referred to as the *guarantor*.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > Responsible Party**.
3. Enter information in **Name**, **Address**, and **Contact Information** or update the existing information.

   Some of the information might already be completed based on the information that your healthcare organization has recorded for you.

4. Click **Save**.
5. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Edit insurance information

The **Insurance** tab lists your primary, secondary, and tertiary insurance information.

The **Insurance Information** page features three expandable sections, for primary, secondary, and tertiary insurance information. The **Primary Insurance** section is displayed by default.

1. Sign in to FollowMyHealth® Personal Health Record.
2. Click **My Account > My Info > Insurance**.

   Some of the information in **Insurance** might be completed, based on the information your healthcare organization has recorded about you.

3. In the **Primary Insurance** section, enter or modify basic policy information and policy holder information as needed.
4. (Optional) If you have secondary insurance coverage, expand the **Secondary Insurance** section and enter or modify basic policy information and policy holder information as needed.
5. (Optional) If you have tertiary insurance coverage, expand the **Tertiary Insurance** section and enter or modify basic policy information and policy holder information as needed.
6. Click **Save**.
7. (Optional) Click **Send** to send a message to your provider about updates made to your demographic information.

Connections

The **Connections** section is where you can manage your connections to your healthcare organizations, providers, health sources, family members and dependents, and third-party apps.

Connections contains multiple categories, featured as expandable accordions, to manage your connections. Connections are divided into four categories:
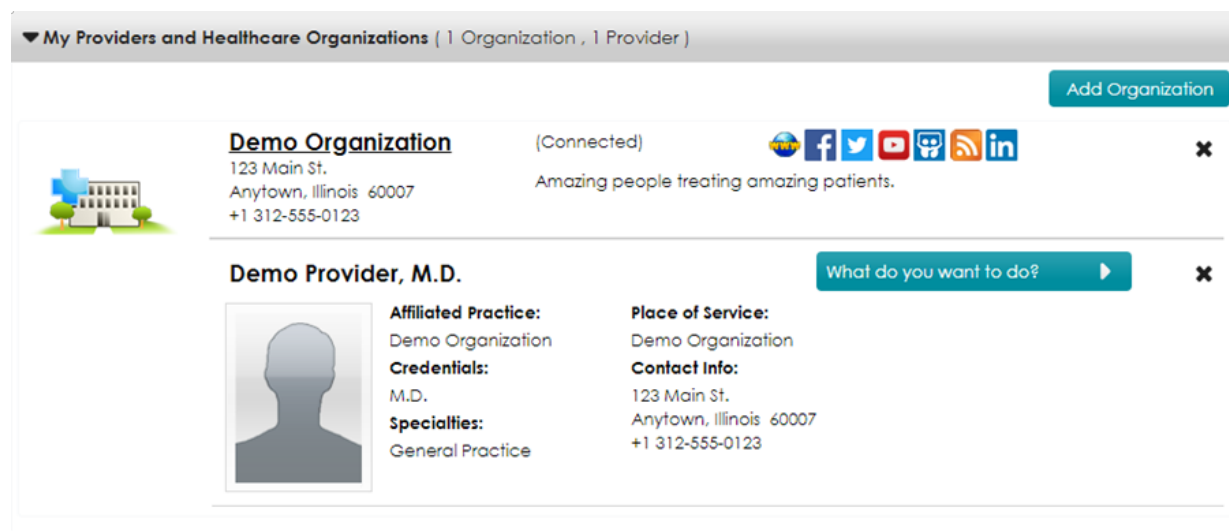
- **My Providers and Healthcare Organizations**
- **Health Sources: Personal Monitoring Devices and Apps**
- **Authorized Individuals: Family Members, Dependents, etc.**
- **Third-Party Apps**

Clicking these accordions expands and collapses them, allowing you to review and manage the connections in each.

My Providers and Healthcare Organizations

My Providers and Healthcare Organizations is where patients can view and manage their connections to their providers and healthcare organizations.

By default, the **My Providers and Healthcare Organizations** accordion is expanded when patients visit the **Connections** section of their FollowMyHealth® account. The heading includes additional information, such as how many providers and organizations you are connected to.
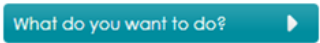

From here, patients can view information related to and interact with their connected healthcare organizations and providers. To the right of the healthcare organization's name and contact details,

patients will find the organization's connection status, description, and icons linking to a variety of related websites (if configured).
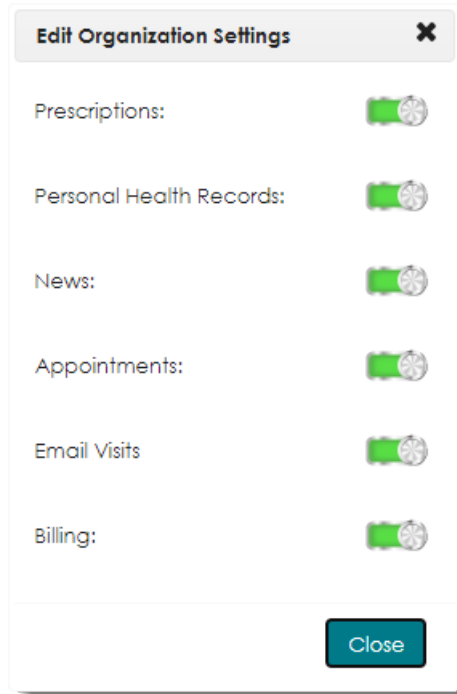
Clicking on the healthcare organization's name brings up the **Edit Organization Settings** window, where patients can enable or disable the flow of certain information to their FollowMyHealth account.

Add Organization allows patients to search for and request a connection to organizations allowing patients to connect through FollowMyHealth without an invitation.
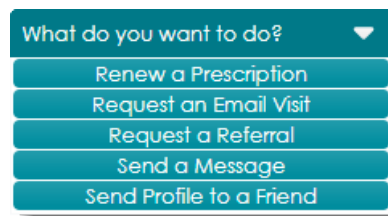
What do you want to do? brings up interactions available for the provider, such as sending a message, renewing a prescription, sending their profile to a friend, and more depending on what they and their associated organization have configured.

Using the **X** button, patients can disconnect their FollowMyHealth account from the selected organization. This severs the connection entirely, preventing any further information from being transmitted to or from the selected organization and also any interactions such as messaging a provider associated to the selected organization.

> **Warning:** This action cannot be undone, so patients must proceed with caution, as reconnecting to the organization will require a new invitation or requesting a new connection to them (if allowed).

Patients can also use the **X** button to remove a provider from their account. This action hides the provider's name on all associated clinical data, and also removes them as an option for any sort of interactions, such as messaging. This action is not permanent and can be reversed by removing their entry in **My Account > Preferences > Restore Deleted Items**.

Add a connection to an organization

Add a connection to a healthcare organization to see results and information from your visits in your FollowMyHealth Personal Health Record account.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.
3. Click **My Providers and Healthcare Organizations**.
4. Click **Add Organization**.
5. For **Search**, enter your ZIP Code, organization, or provider.

   Search results display in **Organization Search**.

6. (Optional) To filter the search results, for **Distance in Miles**, enter the number of miles from the ZIP Code that you want to search, or select the type of organization from **Organization Type**.
7. Select an organization from the search results.
8. Click **Connect**.

   Request for Access Authorization opens.

9. Click **I Accept**.

   > **Note:** The organization that you want to connect to might require you to verify your identification. If the organization requires this verification, **Patient Identification Authorization** opens.

   If you are not required to verify your identification, **Your Connection Request is Pending** is displayed.

10. (Optional) If you are asked to verify your identification, complete the following steps.

    a) Click **I Agree** to authorize verification of your identity.

    The text under the date is saved as a document and sent to your health record. The document is listed in the **Documents** tab.

    b)   On the **Patient Identification** page, provide the request information.

    c)   Click **OK**.

        Questions displays. You must answer a series of questions.

    d)   Answer questions as applicable and click **Next** to open the next question.

        The last question displays **Finish**.

    e)   Click **Finish**.

    Your Connection Request is Pending displays.

11.   Click **Continue**.

Results of this task

A connection to the organization is added and a connection request is sent to the organization.

Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organization responds to your connection request, your FollowMyHealth Personal Health Record account contains only the demographics information that you provided when you created your account.

What to do next

View pending connections at **My Account > Connections**.

Configure organization clinic settings

Manage connections to organizations and clinic settings associated with the organization. For example, if you do not want to receive specific types of clinical results from an organization, you can turn off the clinical settings for that organization.

The settings include prescriptions, personal health records, news, appointments, and billing.

1.   Sign in to the FollowMyHealth Personal Health Record.

2.   From the static toolbar, click **My Account > Connections**.

3.   Click **My Providers and Healthcare Organizations**.

4.   Select the organization that you want to edit.

    Edit Organization Settings opens.

    Click to turn on (green) and off (gray) clinic settings in your connection.

> **Attention:** Your organization can turn on or off a preference that displays your provider in **My Providers and Healthcare Organizations**. If your provider is not displayed, you can still send

clinician messages and schedule appointments if those services are
enabled for the provider.

5.   Click **Close**.

View providers

Providers that you are connected to are displayed in a list in **Connections**. You can perform tasks
from the provider's information section, such as schedule an appointment, renew a prescription,
or request a consultation.

> **Note:** The organization must enable its provider names to be displayed
> in the list. If an organization prevents provider names from displaying, only
> the organizations are displayed in the list.

1.   Sign in to the FollowMyHealth Personal Health Record.
2.   From the static toolbar, click **My Account > Connections**.
3.   Click **My Providers and Healthcare Organizations**.

     Your organization and provider connections are displayed.

4.   Click **What do you want to do?** to view the available tasks .
5.   Select the tasks you want to do.

     • **Renew a Prescription**
     • **Request an Email Visit**
     • **Request a Referral**
     • **Send a Message**
     • **Send Profile to a Friend**

     > **Note:** The available tasks depend on the preferences enabled by
     > your provider or organization.

6.   Click **Additional Providers** to see other providers associated with the organization that you
     can connect with.

Send a provider profile

Share a provider profile to refer the provider to family and friends.

1.   Sign in to the patient FollowMyHealth Personal Health Record.
2.   From the static toolbar, click **My Account > Connections**.

3. Click **My Providers and Healthcare Organizations**.
4. From **What do you want to do**, select **Send Profile to a Friend**.

   Share Provider Profile opens.

5. Enter your friend's email address, a subject, and a message.
6. Click **Send**.
7. Click **OK**.

Health Sources: Personal Monitoring Devices and Apps

Health Sources: Personal Monitoring Devices and Apps is where patients can connect their FollowMyHealth® account to other devices and apps. Connecting to devices and apps allows the automatic upload of certain health information to their FollowMyHealth account, such as steps, weight, glucose and blood pressure readings.

In **Health Sources: Personal Monitoring Devices and Apps**, patients can view and manage the available health sources that are available to be connected to their FollowMyHealth account. To learn more about health sources, patients can click the **Learn more about Health Sources...** link.

Use the **Add Connection** button for the desired health source to launch a window where you will be asked to sign into your associated account. Once this is completed, the health source will be connected to your FollowMyHealth.

Authorized Individuals: Family Members, Dependents, etc.

Authorized Individuals: Family Members, Dependents, etc. is where patients can view, manage, and grant access to their FollowMyHealth® account and also manage access to other accounts they may be an authorized individual for.

The **Authorized Individuals: Family Members, Dependents, etc.** category displays all individuals that have access to your account and their access level, and the individuals whose accounts you are an authorized individual for and your access level. The heading includes the combined number

of accounts that you have access to as an authorized individual for and those that have access to your account as an authorized individual for you.

Patients can invite family members or caregivers to become an authorized individual for them by using the **Add Authorized Individual** button, and also revoke access for their authorized individuals or access to accounts they are an authorized individual for using the **Remove** button.

Authorized individuals must have an established access level that can restrict the amount of information they can see, the actions they can perform on behalf of the patient, and if health record updates to the account are allowed. **Access** is one of three levels:

- `Full Access`—This access level indicates the authorized individual has full access to the account. Full access allows them to view and edit information, schedule appointments, and communicate with your providers on your behalf.
- `Young Adult`—This access level is only used for minor accounts and indicates the patient has reached a "protected age" where local laws restrict or deny the parent or guardian's access to the minor's medical information. The authorized individual has access to the medical information made available before the patient reached the protected age but no new information is uploaded to the account, as indicated by the `Inactive` status for **Health Record Updates**.

> **Note:** Some organizations may still upload certain appointment or encounter summary information for young adult accounts.

Some authorized individuals may still be able to message and schedule appointments on behalf of patients with this access level depending on if the information made available prior to the protected age qualifies for the patient-provider relationship in FollowMyHealth. Similar to full access, they are able to view and edit information.

- `Read Only`–Read only access only allows them to view your records. They will not be able to make changes or communicate with your providers.

Health Record Updates indicates whether the associated patient account is receiving health record updates from its connected organizations.

Add an authorized individual to access your account

You can share access to your health account with others. This is useful when you rely on a relative or friend to help with setting appointments, reviewing test results, and other aspects of your healthcare. To share access, complete the **Add Authorized Individual** process from the FollowMyHealth Personal Health Record.

To share access to your account:

- Send an authorized individual invitation from your FollowMyHealth Personal Health Record account.
- Request that your healthcare organization send an authorized individual invitation email on your behalf.

To request authorized individual access to a minor, such as your child, contact the healthcare organization.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.
3. Click **Authorized Individuals: Family Members, Dependents, etc.**.
4. Click **Add Authorized Individual**.
5. Provide the requested information, including **Invitation Code**, and **Access Level**.

   The invitation code is the code you received when setting up your account.

   For **Access Level**, select **Full Access Authorized Individual** to enable the invitee to have full access to your health account, including viewing your information, entering data, deleting data, and sending secure messages to your providers on your behalf.

   To limit your authorized individual to only viewing your account information, select **Read Only Authorized Individual**

6. Click **Send Invite**.

   Invitation Confirmation opens, and you can confirm that you want to send an authorized individual invitation.

7. Click **OK** to send the authorized individual invitation.

Results of this task

Your designated person receives an invitation to complete the authorized individual invitation process to access your health account.

Third-Party Apps

Third-Party Apps is where patients can view and manage the third-party applications that are authorized to connect to the Veradigm® FHIR API through FollowMyHealth®.

Third-Party Apps lists the third-party applications that have been authorized to connect to the Veradigm FHIR API through FollowMyHealth, allowing these authorized applications to retrieve your health records directly from your healthcare organizations. This category also provides an explanation of what are "third-party apps," which patients can view by expanding **What are third-party apps?**

What is *FHIR*? FHIR is **Fast Healthcare Interoperability Resources**, a standard developed to promote interoperability and enable providers and healthcare organizations to easily and securely share patient information even when using different healthcare software systems. For patients, this means they have the ability to gather and access their medical information from multiple healthcare organizations in a third-party application such as Apple Health or MyLinks. Participating healthcare organizations using the Veradigm FHIR API with these third-party applications may have patients verify their identity using their FollowMyHealth account, which would appear in the **Third-Party Apps** list after being authorized by the patient.

> **Note:** This does not apply to connections to Cerner's FHIR API through FollowMyHealth.

▶ **Third-Party Apps** (2 Authorized Apps)

Below are applications you're allowing to access your medical records. You can control which apps have access to your information. To stop sharing, or view what's being shared, click on the app in the table below.

▼ What are third-party apps?

Third-party apps offer another way for you to manage your health information. These apps were not created by FollowMyHealth or your healthcare organization. Connecting your account to a third-party app will allow it to access your information.

Past sharing of information already approved by you cannot be undone. It can only be stopped going forward. Shared information may no longer be subject to the HIPAA Privacy Rule or other laws or regulations that apply to this type of information. It may also be subject to further disclosure. To stop sharing, remove the connection below.

The third-party app will have its own privacy policy. Be sure to read its privacy policies and terms of use before allowing access.

Third-Party Applications	Data Source(s)
Apple Health	**Demo Organization**
MyLinks	**Demo Organization 2**

Patients are displayed their authorized apps in a table view. **Third-Party Applications** lists the name of the authorized application, and **Data Source(s)** shows which healthcare organizations the third-party application is authorized to retrieve their medical records from.
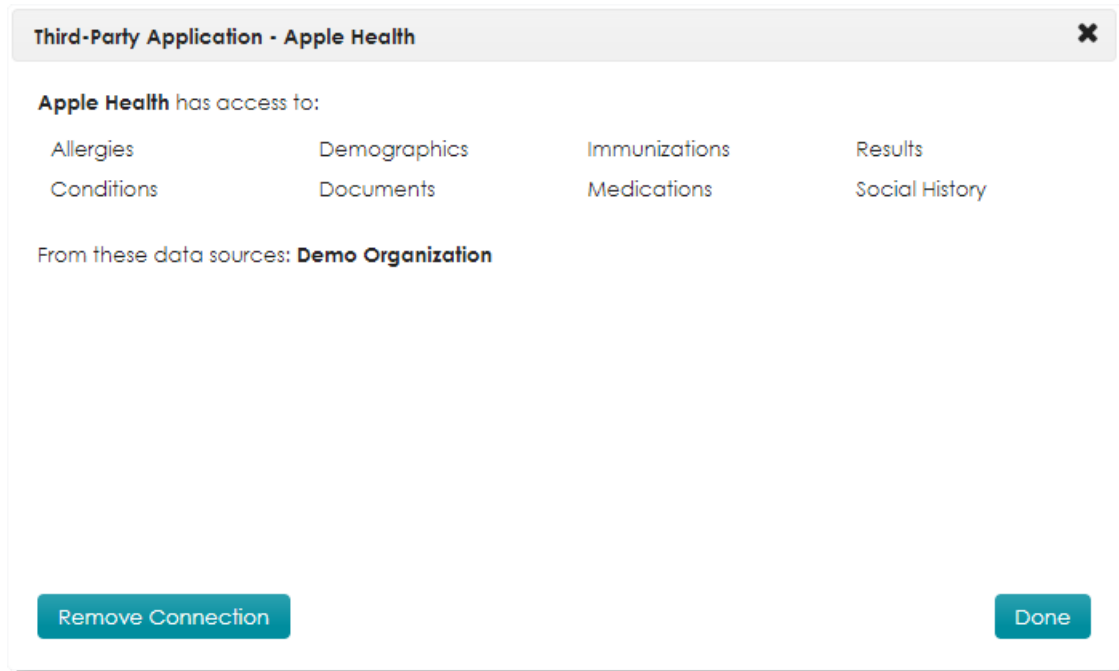
By clicking on a row in the table, patients are able to review additional details and manage their authorization of the connection. Clicking **Remove Connection** revokes the authorization for the displayed application, severing the connection and preventing new medical information from the healthcare organization from transmitting to the third-party application.

> **Warning:** This action cannot be undone, so patients must proceed with caution, as patients must re-authorize the third-party application in order to re-establish the connection.

Manage billing

Use the FollowMyHealth Personal Health Record to manage billing options, such as paying invoices, viewing pending insurance submissions, and viewing paid invoices.

The following sections are available in **Billing**.

Ask A Billing Question

Displays **Ask a Billing Question** if your provider accepts billing questions through the FollowMyHealth Personal Health Record.

Patient Responsibility

Lists the invoices sent to you by the organization. The list includes date of service, invoice number, provider, procedures, charges, and amount due.

Pending with Insurance

Displays the invoices that have been submitted to your insurance.

Paid Invoices

Displays invoices that have been paid in full.

Viewing your invoices

You can pay invoices through the FollowMyHealth Personal Health Record if your provider or organization supports this.

View your invoices:

- From **Billing** on the **Home** tab
- From **Action Center** on the **Home** tab
- From **My Account > Billing** on the static toolbar

View your invoices from Billing on the Home tab

View the invoices that you are responsible for.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **Home**, scroll down to the **Billing** section at the bottom right.
3. From the **Billing** section, click **Details** next to the invoice that you want to view.

   Billing opens. The billing group that is connected to the invoice is displayed with **Patient Responsibility** expanded.

4. To view more details about the procedures on your invoice, click the link in the **Procedure** column.

   The type of office visit, lab work, and other tests are displayed in a list.

What to do next

Pay your invoice.

View your invoices in Action Center

View your unpaid invoices in **Action Center** on the FollowMyHealth Personal Health Record **Home** tab.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the **Home** tab, in **Action Center**, click the unpaid invoices notification.

   Unpaid Invoices opens.

3. Select the invoice that you want to view.

   Billing opens The billing group that is connected to the invoice displays with **Patient Responsibility** expanded.

4. (Optional) To view more details about the procedures that you were invoiced for, click the link in the **Procedure** column.

Results of this task

You opened **Billing** and viewed your invoice.

What to do next

Pay your invoice.

View your invoices from My Account

View your invoices from **My Account > Billing**.

Billing includes:

* **Patient Responsibility**
* **Pending with Insurance**
* **Paid Invoices**

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click **My Account > Billing**.

   The invoices available for payment are displayed under **Patient Responsibility**.

   Invoices are displayed according to the connected billing group. To view additional invoices associated with other billing groups, select the billing group from **Billing Group**.

3. (Optional) To view more details about the invoiced procedures, click the link in the **Procedure** column.

   Procedure displays.

   The type of office visit, lab work, and other tests are listed.

Results of this task
You opened **Billing** and viewed your invoices.

What to do next

Pay an invoice.

Pay your invoices

You can pay your invoices from the FollowMyHealth Personal Health Record if your provider and organization support it.

Before you begin
See the link below to the related topic, "Viewing your invoices" for ways to view your invoices in the FollowMyHealth Personal Health Record.

> **Note:** If your provider or organization does not support billing through the FollowMyHealth Personal Health Record, the page is blank.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **Billing > Patient Responsibility**, select an invoice.

   - Select one invoice by selecting the box next to the invoice. You can select multiple invoices.
   - Select **Pay All Invoices**.
   - Enter a payment amount for an invoice in **Pay Now**.

   The total for the invoices selected or the amount that you entered, is listed in **Pay Now**.

3. Click **Pay Now**.
4. Enter the required payment information.
5. Click **Process Transaction**.

Results of this task
The invoice you paid is removed from **Patient Responsibility** and added to **Paid Invoices**.

What to do next

Review your invoices that are pending insurance review. Invoices listed in **Pending With Insurance** are sent to your insurance company for payment. These invoices are currently not your responsibility, but may become so after insurance company deliberation.

Related concept information

Billing questions

If your provider or organization supports billing questions, **Ask a Billing Question** is available from **Billing**.

You can also send a billing question when you compose a secure message from your Inbox. Click the **Billing Question** check box on **Compose Secure Message** to indicate that the message is a billing question.

Ask a billing question through Billing

If your provider or organization supports billing questions, **Ask a Billing Question** is available in **Billing**.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click **My Account > Billing**.
3. Click **Ask A Billing Question**.
4. Address and compose the message, then send it.

What to do next

Monitor the **Messages** tab for a response from your healthcare organization.

Ask a billing question through Compose Email

If your provider or organization accepts billing questions, **Is this a billing question** is available when you compose an email. This is another way to indicate that your email is a billing question.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Messages** tab.
3. Click **Compose**.

   Compose Email opens.

4. Address and compose the message.

> **Note:** **Is this a billing question** is displayed after you select the provider if the provider or organization accepts billing questions through the FollowMyHealth Personal Health Record.

5. Select **Is this a billing question**.
6. Click **Send**.

Manage preferences

Preferences control several processes in the FollowMyHealth Personal Health Record.

You can manage the following processes through preferences:

Account Preferences

Delete your accounts here.

Sign In Preferences

Manage your sign-in methods, such as using your FollowMyHealth username and password.

Communication Preferences

Manage how you want to be notified about new information that is added to your heath record.

Restore Deleted Items

Restore items that you have deleted from your health record.

Activity History Log

View the recent activity for your health record. The log includes these actions:

- Viewed
- Downloaded
- Transmitted
- Accessed
- Printed
- Emailed
- Faxed

Display Preferences

> Manage the appearance and preferences for the FollowMyHealth Personal Health Record account.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click the applicable preference tab.

Account preferences

You can delete your FollowMyHealth account from within the FollowMyHealth Personal Health Record.

> **Important:**
> This action permanently deletes your account. Access to your online healthcare record and providers is removed.
>
> This action is available only to the primary user of the FollowMyHealth account. Primary users can delete only their own account.
>
> Currently, authorized individuals (even with full access) are allowed to delete their dependents' account if they have the only access (that is, no other authorized individuals have access and the dependent does not have their own sign-in credentials to their account), and they do either of the following:
>
> • Remove their connection to the dependent's account.
> • Delete their own account.
>
> In either case, the dependent's account will then be deleted.

If your account is deleted by your connected organization your associated FollowMyHealth username is also deleted. However, it is still available for reuse if you sign up for a new account and use the previous FollowMyHealth Personal Health Record username.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click the **Account Preferences** tab.
4. Click **Delete your UHR** (Universal Health Record).
5. Click **OK** to permanently delete your FollowMyHealth account.

Sign-in preferences

Manage your FollowMyHealth sign-in preferences.

You can manage your sign-in preferences in the following ways:

- Update your FollowMyHealth password.
- Turn on and off the two-factor authentication feature.
- Configure and remove an alternative sign-in method to your account.
- Manage Single Sign On (SSO) for connections.

> **Note:** If you are an authorized individual, you cannot view **Sign In Preferences** under **My Account > Preferences**, when viewing their account.

Create a FollowMyHealth Sign-In

If you use an alternative sign-in method and do not have a FollowMyHealth® Sign-In username and password, you must create a FollowMyHealth Sign-In.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Do one of the following:

   - Click **Create a FollowMyHealth Username and Password** from the **Action Center**
   - Click **My Account > Preferences > Sign In Preferences**.

3. In **Sign In Preferences**, click the **Create FollowMyHealth Username and Password** link.
4. Enter username and password credentials according to the on-screen instructions.

   > **Note:** If an error occurs while creating the new username, a message appears. Close the window and retry the task.

5. Click **Save**.

   The username is displayed and the **Password** field displays the date and time the password was last updated. The **Two-factor Authentication** field value is **None**, and the alternative sign-in options are displayed.

Change your FollowMyHealth username

Change your FollowMyHealth account username from **Sign In Preferences**.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click **My Account > Preferences > Sign In Preferences**
3. In **Username**, select the row to edit.
4. Enter your current password.

> **Note:** You have six tries to enter your password. After the sixth attempt, you are signed out automatically after 30 seconds. You can try again and have another six tries to enter the correct password.

5. Click **Continue**.
6. In **New Username**, enter the new username.

> **Note:** Use your email address as your username.

The new username is automatically populated with your current email address unless your current username is your email address in which case the new username field is blank.

7. Click **Save**.

> **Note:** If the username is already taken or an error message occurs while changing the username, you receive an error message. Try entering a different username or close the box and return to the **Sign In Preferences** panel.

The next time you sign into your FollowMyHealth account, use your new username and existing password. If you sign in using your old username, you receive an error message.

Each time you change your username, the activity is logged as **Username Changed**, along with the date and time in the **Activity History Log** panel.

> **Note:** You must navigate away from and back to the **Preferences** page and back to the **Activity History Log** to view the new username.

Change your FollowMyHealth password

Change your FollowMyHealth account password from **Sign In Preferences**.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Account > Preferences > Sign In Preferences**.
3. In **Password**, highlight the row to edit.

4. Enter your current password.

> **Note:** You have six tries to enter your password. After the sixth attempt, you are signed out automatically after 30 seconds. You can try again and have another six tries to enter the correct password.

5. Click **Continue**.
6. Change password according to the on-screen instructions.
7. Click **Save**.

   The **Password** field updates to the last date and time when the password was updated (for example, **Last changed 08/16/2019 10:30 AM (CDT)**). When changes are made to your account, you can view them in the **Activity History Log** under **Preferences**.

Two-factor authentication

After you create a FollowMyHealth® username and password, you can add another layer of authentication to secure your account.

Two-factor authentication provides a new verification code each time you sign in with your FollowMyHealth username and password.

The verification code is sent to you through one of the following methods:

- Email
- Text message
- An authenticator app, such as Google or Microsoft® Authenticator

After you sign in to your account, the two-factor authentication sign-in page opens and the verification code is sent to you through your chosen method. Enter the verification code on the two-factor authentication sign-in page to complete the sign-in process.

Add two-factor authentication to your account

Use two-factor authentication with your FollowMyHealth® account to add an extra layer of security to your FollowMyHealth Personal Health Record account. Two-factor authentication is available under **My Account > Preferences > Sign In Preferences**, as long as you have a FollowMyHealth username and password. If your email address or mobile phone number is not verified, a reminder displays in the **Action Center**.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the FollowMyHealth Personal Health Record static toolbar, click **My Account > Preferences**.

3. Click **Sign In Preferences**.
4. In **Two-Factor Authentication**, highlight the row to edit.
5. Select one of the following methods to add two-factor authentication to your account.

- Select **Email**.
  Select this option to receive a verification code to the notification email address that is configured in **Communication Preferences**.

  a. Confirm your email address.

     > **Note:** You need only to verify your email when setting the two-factor preference, if it has not already been verified.

  b. Click **Continue**.
  c. Enter the verification code.
  d. Click **Verify Email**.
  e. After you verify your email address, click **Save**.

     > **Note:** If your connected organization enabled demographics updates, you can choose to send your changes to the organization.

- Select **Text Message**.
  Select this option to receive a verification code through a text message on your mobile phone.

  a. Enter your phone number in **Mobile Phone**.
  b. Click **Continue**.
  c. Enter the verification code.
  d. Click **Verify Mobile Phone**.
  e. After you have verified your mobile phone number, click **Save**.

     > **Note:** If your connected organization enabled demographics updates, you can choose to send your changes to the organization.

- Select **App**.
  Select this option to receive a verification code through an authenticator application on your smart phone.

  a. With the authentication app of your choice, scan the QR code provided on the page, then click **Continue**.
  b. Enter the verification code displayed in the authentication app.
  c. Click **Verify & Save**.
     The **Two-Factor Authentication** field displays your chosen method.

If you change your two-factor authentication method, it is logged in your **Activity History Log**.

— If switched to **Email**, **Two-Factor Authentication set to Email**, is logged displaying the email address at the time of the change.
— If switched to **Text Message**, **Two-Factor Authentication set to Text Message**, is logged displaying the phone number at the time of the change.
— If switched to **App**, **Two-Factor Authentication set to App**.
— If switched to **None**, **Two-Factor Authentication Disabled** is logged with no details.

> **Note:** The user must navigate back to the **Preferences** page to see these updates in **Activity History**. If you updated your email or mobile phone number, then **Email Verified** or **Mobile Phone Added** displays in the **Activity History Log**.

Change two-factor authentication to your account

If you no longer want to use your current email address or mobile phone number for the two-factor authentication, perform the following task to change the two-factor authentication to your account.

Before you begin

Changing your email or phone number within the two-factor authentication preferences changes it globally on your account, not only for two-factor authentication.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the FollowMyHealth Personal Health Record static toolbar, click **My Account > Preferences**.
3. Click **Sign In Preferences**.
4. In **Two-Factor Authentication**, highlight the row to edit.
5. Select one of the following methods to change the two-factor authentication to your account.

   • Select **Email**.
   Select this option to send the security code to the notification email address that is configured in **Communication Preferences**.

   a. Click **Change**.
   b. Enter the email address to use in **New Email**.
   c. Click **Continue**.
   d. Enter the verification code.
   e. Click **Verify Email**.

> **Note:** If you click from within the window where you enter the **Verification Code**, a warning message displays. Either click **Cancel** to confirm you want to cancel changing your email address or click **No, Go Back** to continue changing your email address.

    f.   Click **Save** or click **Cancel**.

> **Note:** If your connected organization enabled demographics updates, you can choose to send your changes to the organization.

The new email address displays next to **Two-factor Authentication** on the **Sign In Preferences** page.

• Select **Text Message**.
Select this option to send the security code through a text message on your mobile phone when you change your mobile phone number.

    a.   Click **Change**.
    b.   Enter your phone number in **Mobile Phone**.
    c.   Click **Continue**.
    d.   Verify the information on the page.
    e.   Click **Continue**.
    f.   Enter the verification code.
    g.   Click **Verify Mobile Phone**.

> **Note:** If you click from within the window where you enter the **Verification Code**, a warning message displays. Either click **Cancel** to confirm you want to cancel changing your mobile phone number or click **No, Go Back** to continue changing your mobile phone number.

    h.   Click **Save** or **Cancel**.

> **Note:** If your connected organization enabled demographics updates, you can choose to send your changes to the organization.

The new mobile phone number displays next to **Two-factor Authentication** on the **Sign In Preferences** page.

The **Two-Factor Authentication** field displays your chosen method.

If you change your two-factor authentication method, it is logged in your **Activity History**.

> **Note:** The user must navigate to the **Preferences** page to see these updates in **Activity History**. If you updated your email or mobile phone number, then **Email Changed** or **Mobile Phone Changed** displays in the **Activity History Log**.

Turn off two-factor authentication

Turn off two-factor authentication in the FollowMyHealth Personal Health Record if you no longer want to use it.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Account > Preferences**.
3. Click **Sign In Preferences**.
4. In **Two-Factor Authentication**, highlight the row to edit.
5. Select **None** from the list.
6. Click **Save**.

Manage Single Sign-On

If one or more of your connected organizations support Single Sign-On (SSO) to FollowMyHealth when logged into their website, then you will be able to automatically log into your FollowMyHealth account from your organization's website without having to re-enter your FollowMyHealth username and password.

After you have authorized this from your organization's website, they are listed in your FollowMyHealth account under **My Account > Preferences > Sign In Preferences > Organization Single Sign-On**.

This section is displayed only if you have authorized SSO for your FollowMyHealth® account from your healthcare organization's site or application.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Account > Preferences**.
3. Click **Sign In Preferences**.

   Organization Single Sign-On field is displayed, showing an alphabetical list of organizations, one for each SSO connection, separated by commas.

4. In **Organization Single Sign-On**, highlight the row to edit and select one or more organizations to remove from the list as needed. If you remove an organization from this list, the next time

you access FollowMyHealth from their site you will be required to sign in with your FollowMyHealth username and password. If you remove all organizations, the **Organization Single Sign-On** will no longer be available under **Sign In Preferences**.

Manage alternative sign-in options

Each new FollowMyHealth® Personal Health Record account that you create must have a FollowMyHealth username and password. As a best practice, use this specific username and password to sign in, but alternative options are available after you complete your account registration.

Use the username and password that is associated with the account to sign in to the FollowMyHealth® Personal Health Record if you use:

- Apple ID
- Cerner
- Facebook
- Google
- Microsoft®

This feature is used only to sign in to the FollowMyHealth Personal Health Record. Information within FollowMyHealth is never shared, posted, or exchanged with these services.

> **Remember:** You must have at least one **Alternative Sign In** option or create a FollowMyHealth username and password. For more information on creating a FollowMyHealth username and password, see the link below to the topic, "Create a FollowMyHealth account".

Add or disconnect sign-in methods using **Sign In Preferences**. You must always have at least one active sign-in method.

> **Note:** Your FollowMyHealth username and password are required. You can edit your password in this page, but you cannot remove your FollowMyHealth username and password.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click **Sign In Preferences**.
4. In **Alternative Sign-In Options**, highlight the row to edit.
5. Click **Add** next to the alternative option.
6. Add your credentials according to the on-screen instructions.

Note: A warning message is displayed if you try to add an alternative sign in account that is already connected to another FollowMyHealth® Personal Health Record account.

7. (Optional) Click **Remove** next to an option to remove it from your preferences.

    Note: If you do not have a FollowMyHealth username and password and only one connected alternative sign-in method, then the **Remove** link next to that sign-in method is disabled. Clicking an icon next to the link informs you why you cannot remove this login method. If you choose to create a FollowMyHealth username and password, you can then remove any and all alternative sign-in methods.

    a) Click **Yes, Remove** or **Cancel**.

        After you click **Yes, Remove**, the connection is removed from **Alternative Sign In Options** in **Sign In Preferences**.

Results of this task

An authentication method is added. The next time you sign in to the FollowMyHealth Personal Health Record, select the authentication method with which to sign in. When changes are made to your account, you can view them in the **Activity History Logs** under **Preferences**.

Related task information

Communication preferences

Several methods are available to receive notifications from FollowMyHealth providers and connected organizations.

You can also change a mobile phone number and email address from the **Communication Preferences** tab in **Preferences**.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.

3. Click the **Communication Preferences** tab.

Figure 2: Communication Preferences

4. Review each notification type section and select **Email** or **Text Message** to configure how to receive notifications.

For **Notifications About 3rd Party Partners**, you can select **Email and/or Mail** to enable FollowMyHealth to send email as well as direct mail (for eHealth).

> **Note:** When you select the **Text Message** option, you must click **Agree** on the **Provision of Consent** message to enable text messaging.

The default for all notifications is the email address from your invitation.

When new information is available in your FollowMyHealth Personal Health Record inbox or other locations, you can set preferences to send notifications to your external email account or text messages to your mobile phone:

- **Appointment Reminders**
- **Appointment Updates**
- **Updates to Health Record** (when new items are added to the **My Health** tab in the FollowMyHealth Personal Health Record)
- **Notice of Communication from Provider** (for secure messages from your provider)
- **Notification about FollowMyHealth** (to receive important and new updates related to FollowMyHealth features.)
- **Notifications about 3rd Party Partners** (to receive information about products and services to help you to obtain optimum health.)

> **Note:** This information comes from FollowMyHealth, and is customized for you. On occasion, data in FollowMyHealth might send relevant information to you. For example, if you are 65 or older, you might be reminded about open enrollment for Medicare Advantage. You can select to be notified by email and/or mail, or by text message. Regardless whether you choose to participate in either of these communication methods, these settings allow FollowMyHealth to share information with you. FollowMyHealth does not sell or send any identifiable information about you to third-party partners without your consent.

- **Organization Bulletins** (general news, changes to office hours, flu shot clinic availability, and so on)
- **My Reminders** (created automatically for new goals, if enabled by your provider)
- **Goal Alerts** (received in the Action Center if you accept goals from your provider and if one or more goal rules that are set by your provider are violated)

Change or remove your mobile phone number

FollowMyHealth® can send notifications about updates to your account to your external email address or mobile phone. The mobile phone number on your FollowMyHealth account is displayed in the **Communication Preferences** tab, the **Demographics** page in **My Info**, and the **Goals** tab under **Wellness**.

If you change your mobile phone number in one of these locations, the change is made in all locations.

> **Note:** The **Goals** tab is displayed in **Wellness** when your provider has the goals feature enabled and you have accepted a goal.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From the static toolbar, click **My Account > Preferences > Communication Preferences**.
3. To change your mobile phone number, do the following:

   a) Click **Change** next to your mobile phone number.

   b) Click the country list and select a country code represented by a flag:

   - +1 Canada
   - +44 United Kingdom
   - +1 United States

   c) Enter the **Mobile Phone** number to use for notifications.

   d) Click **Continue**.

   FollowMyHealth sends a verification code text message to your mobile phone.

   e) Enter the **Verification Code** that you received through text message.

   If you do not receive a verification code as a text message, click **Resend verification code**.

   f) Click **Verify Mobile Phone**.

   g) (Optional) Send your mobile phone change to one or more of your connected organizations.

   If you have a connected organization and provider to whom to send demographic updates, send your demographic updates with your mobile phone number changes to one or more of your connected organizations. All available organizations are displayed alphabetically and are selected by default.

4. To remove your mobile phone number, do the following:

   a) Click **Remove**.

A warning message opens. Confirm that you want to remove your mobile phone number or click **Cancel** to disregard your actions and return to the **Demographics** page.

> **Note:** If you have two-factor authentication using **Text Message** turned on, then you are required to turn off two-factor authentication before you can remove your mobile phone number. You can change your two-factor authentication preferences under **My Account > Preferences > Sign In Preferences**.

b) Click **Remove Mobile Number**.

Mobile Phone Removed displays in **Activity History** after you remove your mobile phone number. To see updates, navigate to **My Account > Preferences > Activity History Log**.

Change your email address

Notifications are sent to you through an external email address or mobile phone. The email address that you used when registering for a FollowMyHealth account is shown in the **Communication Preferences** tab, the **Demographics** page in **My Info**, your FollowMyHealth preferences, and the **Goals** tab in **Wellness**.

If you change the email address in one of these locations, the change is made at all locations.

> **Note:** The **Goals** tab is displayed in **Wellness** when your provider has the goals feature enabled and you have accepted a goal.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Preferences > Communication Preferences**.
3. Click **Change** next to your current email address.
4. Enter the new email address.
5. Click **Continue**.

   A verification code is sent to the new email address.

6. Enter the verification code to verify your email address.

   If you do not receive a verification code, click **Resend verification code**.

7. Click **Verify Email**
8. (Optional) Send your email address change to one or more of your connected organizations.

   If you have a connected organization and provider to whom to send demographic updates, send your demographic updates with your email address changes to one or more of your

connected organizations. All available organizations are displayed alphabetically and are selected by default.

Display preferences

With display preferences, you can change the display of the FollowMyHealth Personal Health Record, make alternative text available for images, change units of measure, and enable disclaimers on messages.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click the **Display Preferences** tab.
4. Change your preferences.

   Accessibility Preferences

   Select **Display images of text** to control how the low, medium, and high resolution images are displayed on the **Results** tab in **My Health**.
   Select **Display high-contrast theme** to change the FollowMyHealth Personal Health Record colors to a high contrast resolution.

   Units

   Select **English** or **Metric** for the unit of measure of vital signs. The default units are dependent on the country used to sign in to the FollowMyHealth Personal Health Record.

   > **Note:** Head circumference measurements always display in metric.

5. Close **Preferences**.

Restore deleted information

Recover information or providers you have deleted with **Restore Deleted Items** in **Preferences**.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click the **Restore Deleted Items** tab.
4. Click **Restore**.

View activity history

Activity History Log in **Preferences** lists all activity in your FollowMyHealth Personal Health Record account, including detailed information about downloaded or emailed clinical documents.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Preferences**.
3. Click the **Activity History Log** tab.
4. Click **Previous** or **Next** to navigate through the **Activity History Log** pages.

What to do next

See the appendix, "Activity History log entries" for more information.

Get technical support and assistance for your FollowMyHealth Personal Health Record account

FollowMyHealth provides several ways to get technical assistance if you have issues working with the application or want to learn more.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click **My Account > Support**.
3. Select from several options:

   - To access Knowledge Base, click **My Account > Help**.
     This library provides articles about:

     — Getting started with the product
     — Frequently asked questions
     — Security
     — Problems and issues
     — Using the product with mobile devices and other resources

   - To access the patient user manual, click **My Account > Preferences**, then click **User Manual** to access the *FollowMyHealth® Personal Health Record User Guide*.
     You can also access the user manual by clicking **My Account > Support**, then clicking **User Manual**.

Changing the personal health record language

You can change the language that is displayed in the FollowMyHealth Personal Health Record by toggling between English or Spanish.

In the static toolbar, you can click **English** to select another available language in which to display the personal health record content (currently only Spanish is supported). Click **Spanish** to switch the displayed language back to English.

Search the FollowMyHealth Personal Health Record

Search all tabs and pages in your health account by using the search icon located in the static toolbar. The search mechanism searches each FollowMyHealth Personal Health Record tab for clinical results or information.

The Search tool features a quick list choice, or you can open the **Search** page for results.

1. Sign in to the FollowMyHealth Personal Health Record.

2. From the static toolbar, click   .
    A quick list is returned for results or you can click **See more results**.
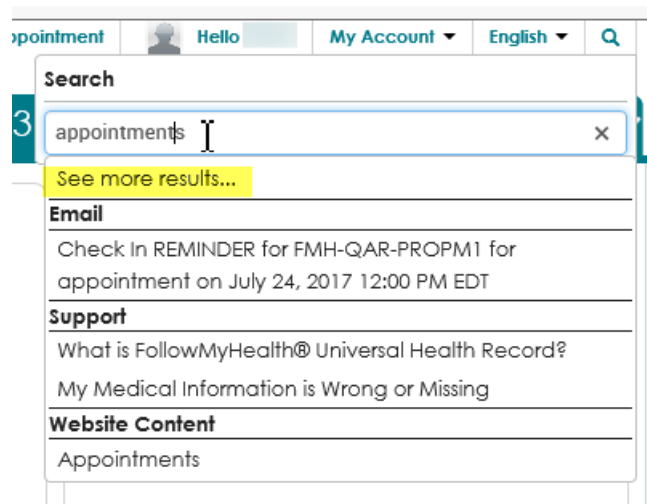
3. Click **See more results**.
    Search opens.
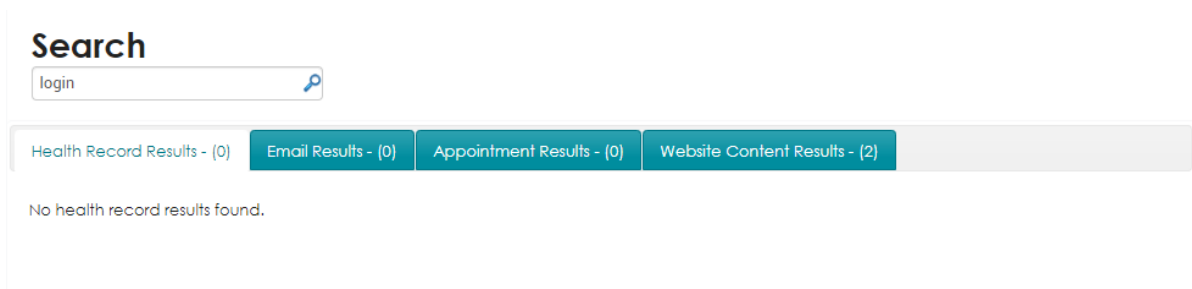
The additional search results are organized in tabs.

4. Select the result description box to open details about the item.

   If the item is a clinical item, an edit page opens where you can edit the item. If the item is an email, the Inbox opens with the specific email displayed, and so on.

Results of this task

You used the search icon to find results and information in your health account.

Chapter 5

The Home tab

The **Home** tab is displayed when you first sign in. You can compose a message, view your health summary, manage activities, appointments, billing, wellness, and applications from the **Home** tab.

If your healthcare provider participates in telehealth services, you can access **On-Demand Video Visit** or **Email Visit** services from **Get Treated Now** on the **Home** tab.

Health Summary

Health Summary on the **Home** tab includes basic information about you, including age, birth sex, height, weight, body mass index (BMI), blood pressure, preferred pharmacy, and primary insurance.

The information under **Health Summary** is pulled from the clinical item tabs in **My Health**.

Action Center

Action Center on the **Home** tab notifies you of items that require your attention. You can view an **Action Center** list or a calendar view.

Action items for patients that you are an authorized individual for are also listed on **Action Center** under the patient's name.

Select any item from the **Action Center** list to expand the section in the FollowMyHealth Personal Health Record. For example, select a clinical item from **Updated Clinical Items** and the clinical item opens as if you are in **My Health**. View the details from this page and print, fax, or email.
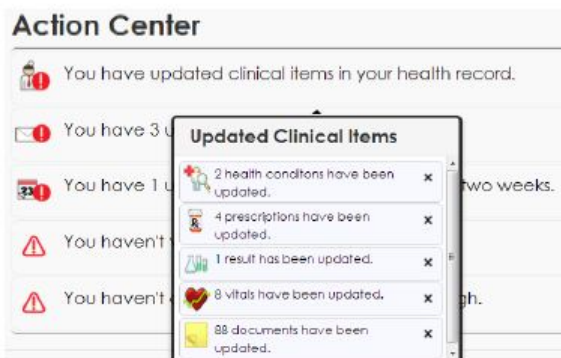
The provider might send you a form to update your health information. In this scenario, an action item displays in **Action Center**. Click the forms attachment to open the form. Complete the form from **Action Center** and click **Submit** to send the form back to your provider.

> **Note:** If the due date for the form has passed, the Action Center item is no longer displayed.

You can also launch InfoButton™ education without navigating to **My Health** or **Know My Health**.

The calendar view contains thumb tack icons to indicate appointments or events are scheduled. You can print, email, and export from the calendar view.

When you export your calendar view, the scheduled appointments display in the calendar program, such as Microsoft® Outlook.

When you email, print, or fax your health record data from an appointment, the message in the confirmation page includes a statement that transmitted health data is not encrypted.

App Center

The **App Center** on the **Home** tab provides access to applications that are installed on FollowMyHealth and enables you to install more applications.

The following applications integrate with FollowMyHealth and capture data to post to your health record.

- My Charts
- Health Journal
- Know My Health
- Blood Sugar
- Pay Bill

> **Note:** If you pay bills from the **App Center**, you might see the following message after you click **Details**:
>
>
>
> After you click **Continue** you are taken to the provider's billing site.
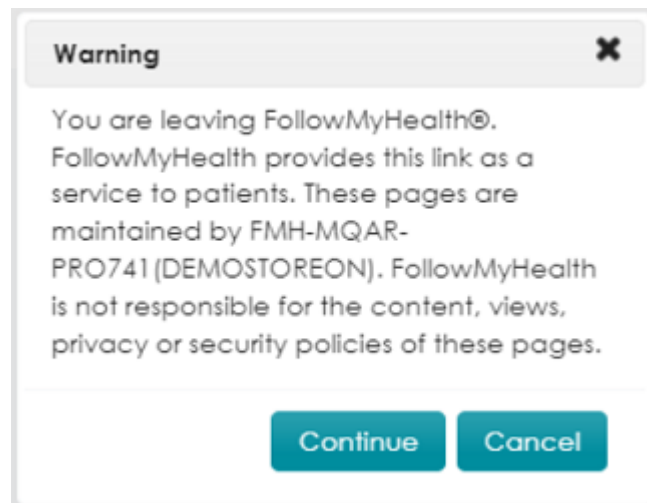
My Charts, Health Journal, and Know My Health are automatically installed for you when you create your FollowMyHealth Personal Health Record account.

> **Attention:** Device applications, such as Garmin, Withings, and iHealth®, are no longer connected to the FollowMyHealth Personal Health Record through **App Center**. These applications and devices are available:
>
> - Through **Devices & Apps** on the **Home** tab
> - Through **Devices & Apps** on the **Wellness** tab

- From **My Account > Connections > Health Sources: Personal Monitoring Devices and Apps**

Install applications

Install applications that integrate within FollowMyHealth and capture data to post to your health record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **App Center** on the **Home** tab, click **Add Apps**.

   App Store opens.
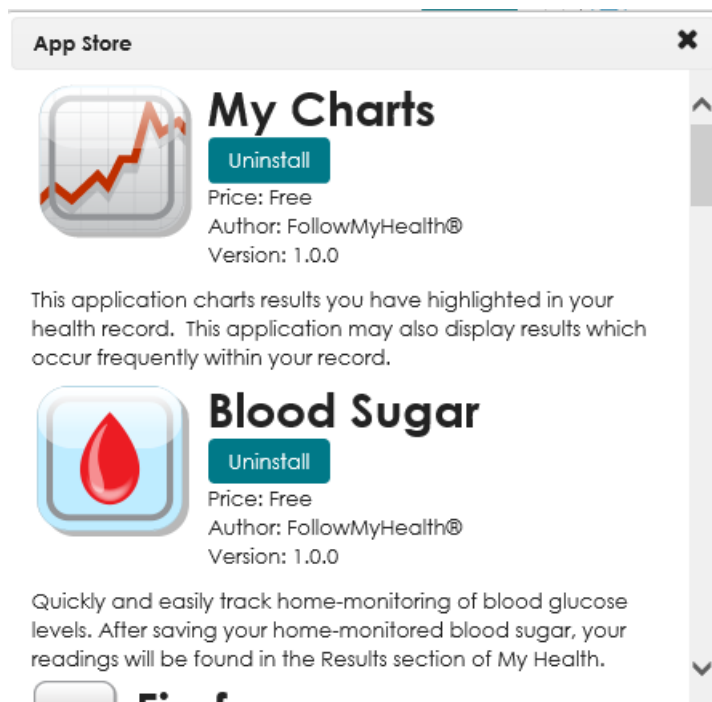
3. Click **Install** for the application that you want to add.

   The application automatically installs and is available in the browser.

   > **Note:** If you are installing the single sign on (SSO) application, a security and privacy disclaimer displays. You must click **Yes** to continue with the installation.

   If you click **Uninstall**, the application is automatically removed and does not display when you browse your applications.

What to do next

Each installed application is represented by a teal color dash icon.
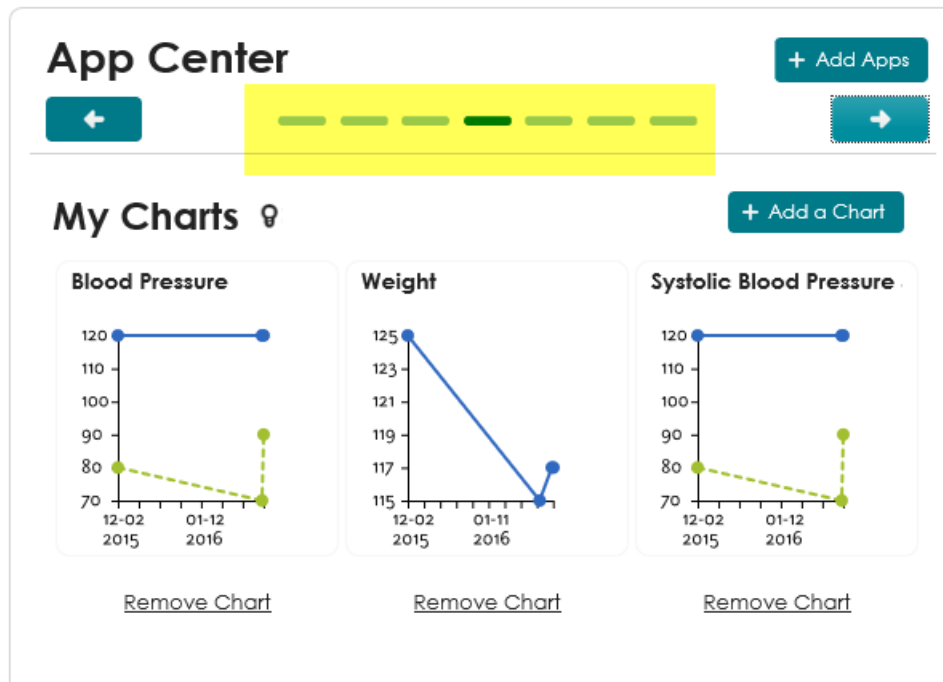
Point to the dash icon to display the application name. When you click the icon, the application opens. Alternatively, use the backward and forward arrow icons to switch between applications.

Single Sign-On

If your provider has a Single Sign-On (SSO) application available in **App Center**, use the application to set up Single Sign-On between your FollowMyHealth account and third-party applications.

If your provider has set up the application to automatically upload to FollowMyHealth, the SSO application displays in **App Center** and is ready for you to use. Otherwise, you must install the application from **App Center**.
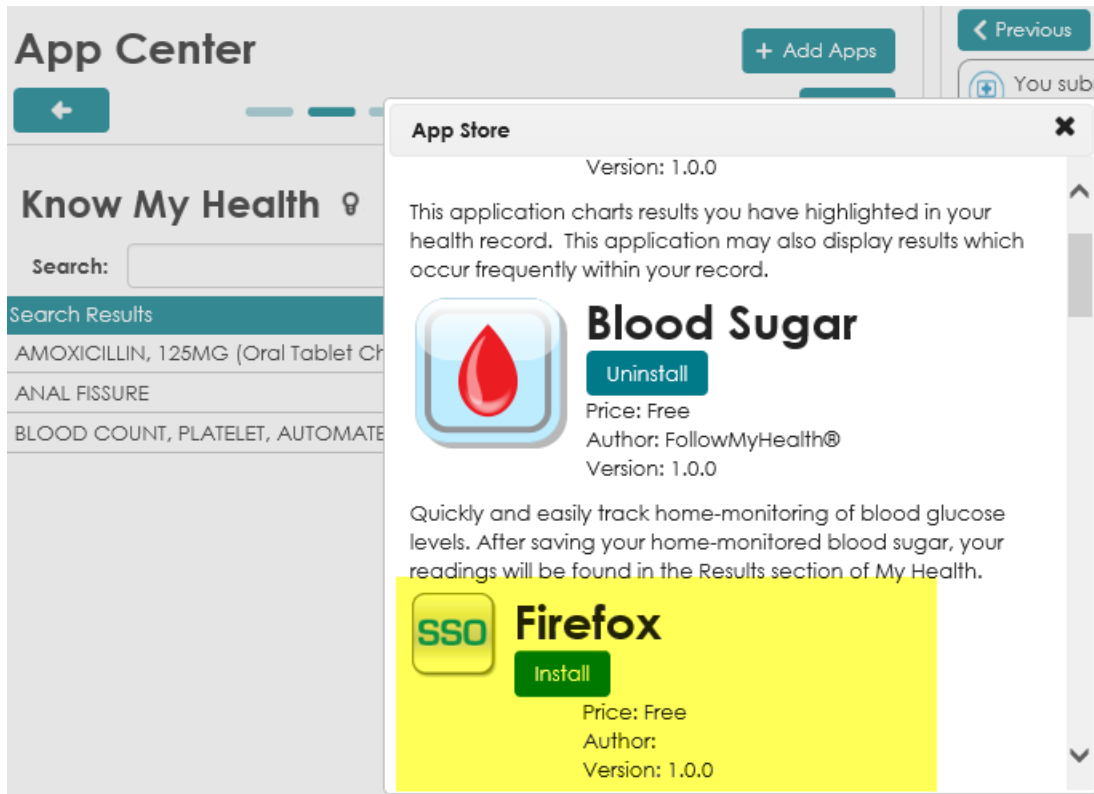
Create a Health Journal entry

Health Journal is an application that provides an online journal for notes about your health.

> **Important:** Health Journal entries are never shared outside of your FollowMyHealth account, but you can print the entries to share with your provider.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **App Center** on the **Home** tab, go to the Health Journal application.

   The Health Journal application opens.
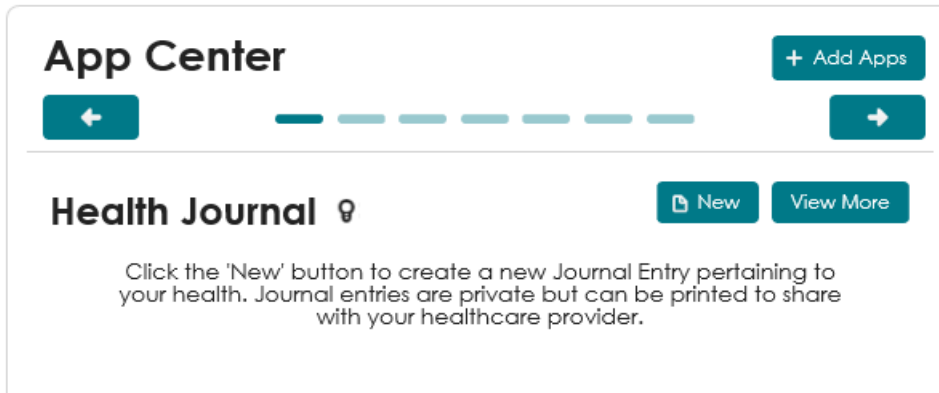
3. Click **New**.

   A new journal page opens.
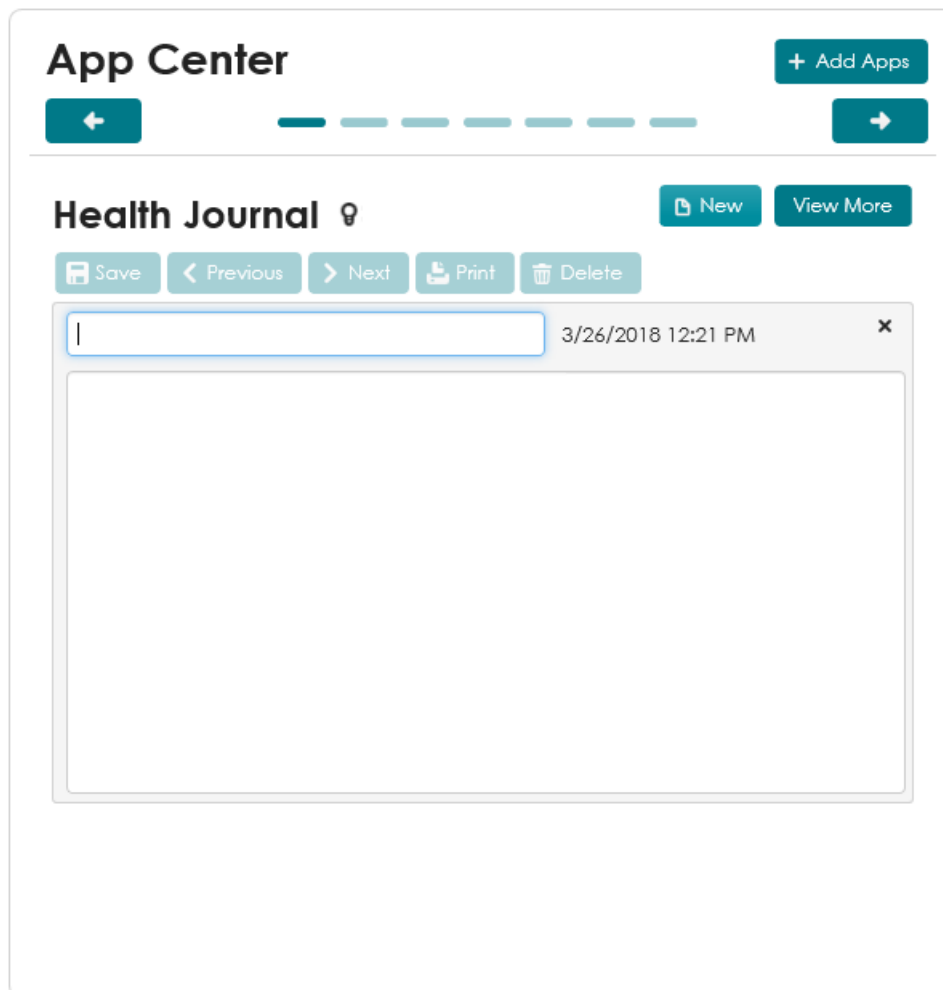
4. Enter a title and notes for the journal entry.

> **Remember:** Journal entries are private. The provider cannot read your entries.

5. Click **Save**.

The journal entry is posted on the main page of the Health Journal application.
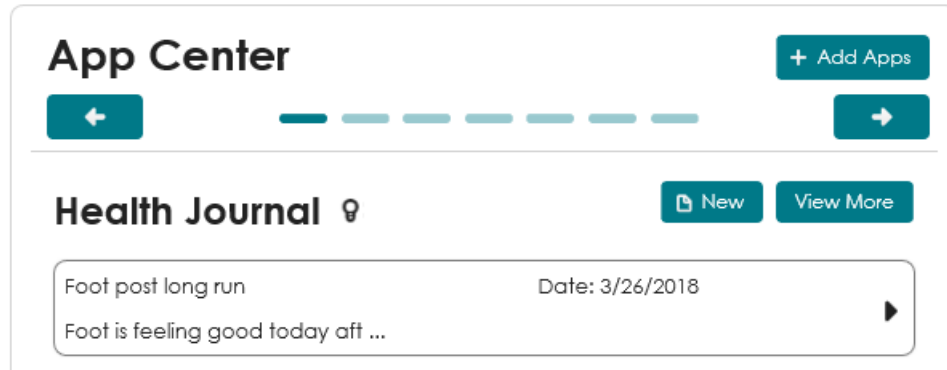
6. To view additional journal entries that are not displayed under Health Journal, click **View More**.

The Health Journal page expands to include all journal entries.

7. Click a journal entry to open and view details.

The journal entry opens.
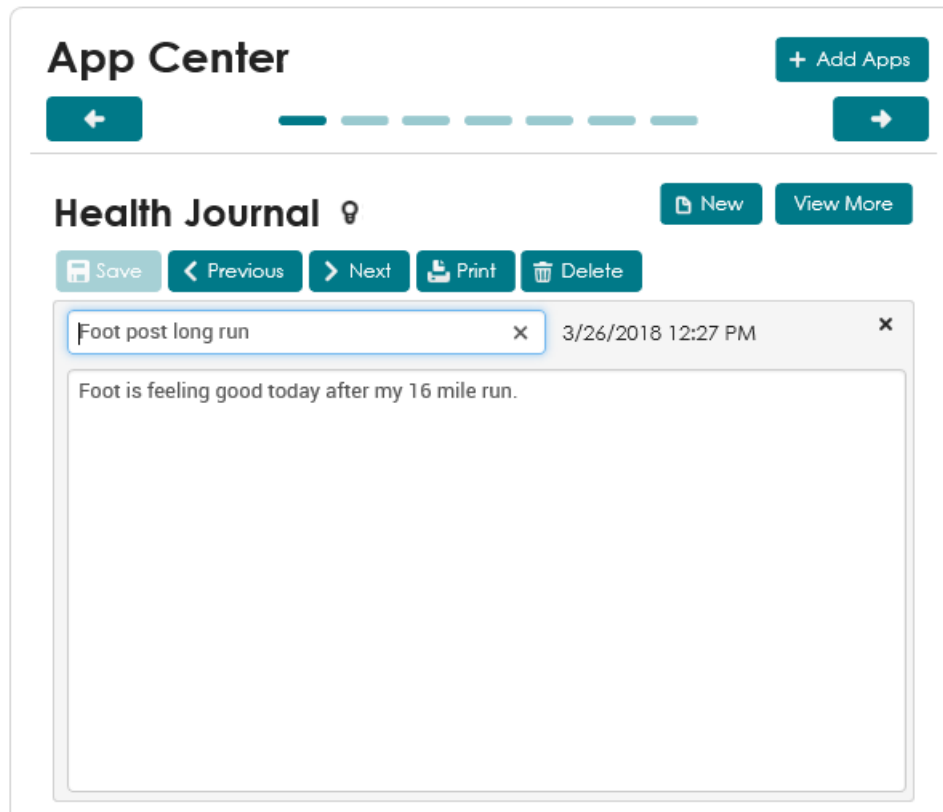
8. (Optional) To edit the entry, change the text or add more content to the entry and click **Save**.

9. (Optional) To print the journal entries to share with your provider, click **Print**.

10. (Optional) To delete a journal entry, click **Delete**.

    Click **Yes** to confirm that you want to delete the entry.

Results of this task

You have learned how to create a journal entry, view additional journal entries, and print and delete a journal entry.

Manage My Charts data

The My Charts application automatically displays charts for weight, blood pressure, and the top most-resulted item in your FollowMyHealth account.

These charts are the default view if each item has more than three data points. If any of the automatically-graphed items has less than three data points, the graph does not display.

If you add your own vital sign values yourself, the measurements display the next time you sign in.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **App Center** on the **Home** tab, go to the **My Charts** application.
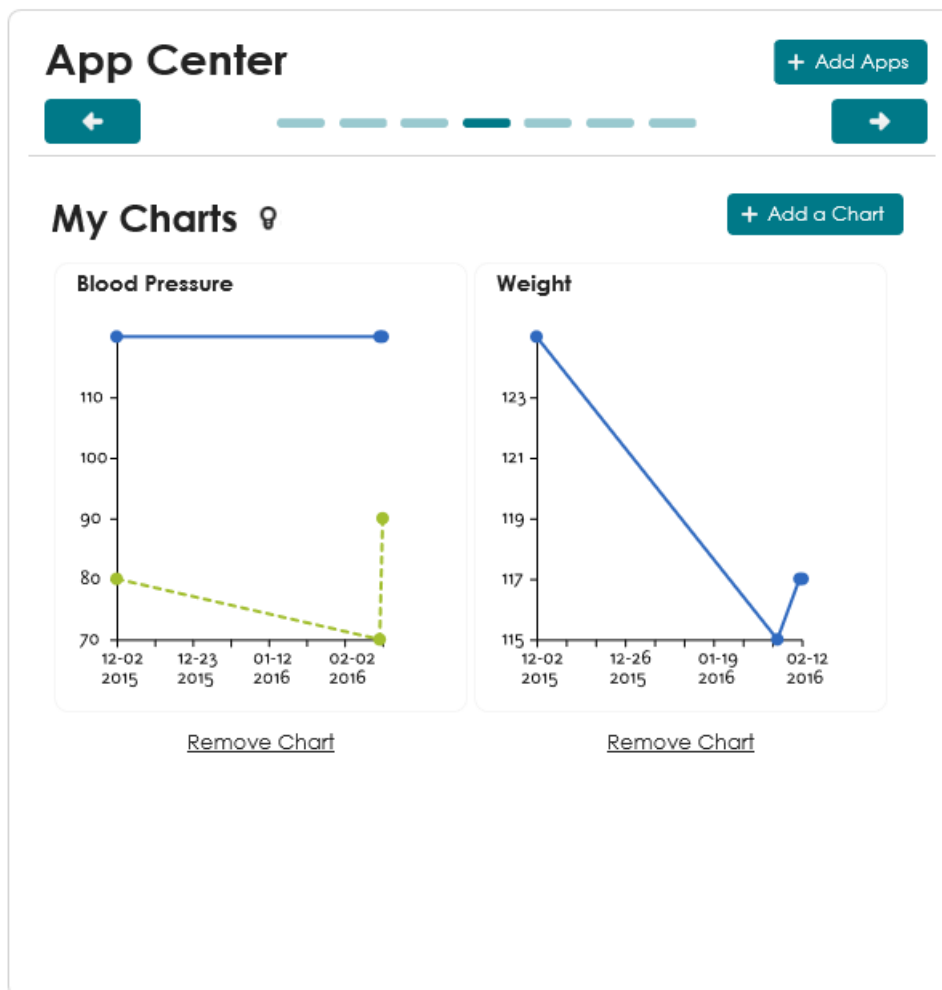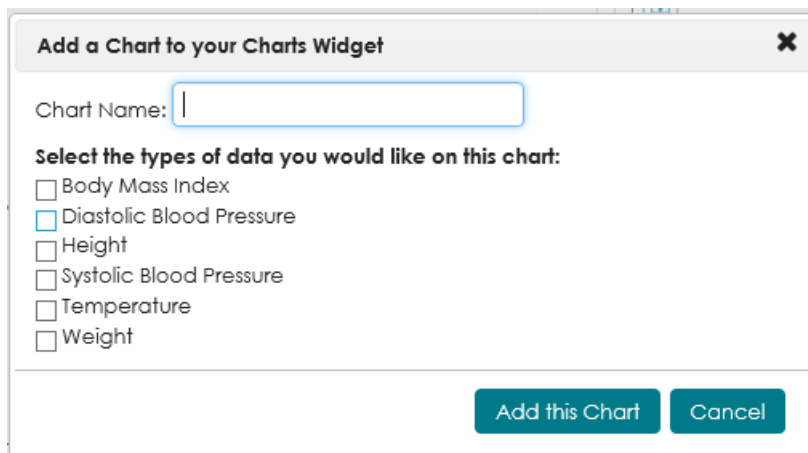
   The **My Charts** application displays.

3. Click the chart that you want to view details for.
   The chart is displays.
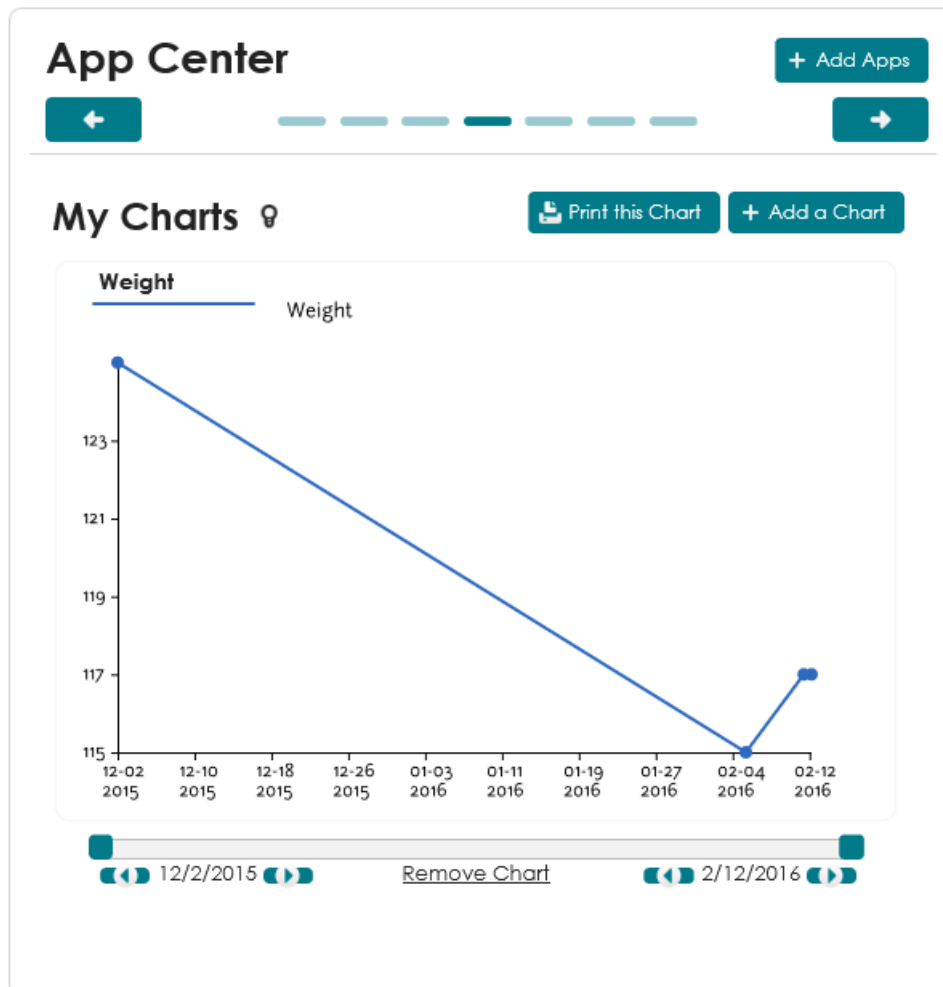
4. (Optional) To print the chart, click **Print this Chart**.
5. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.
6. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.
7. Click the graph title to return the graph back to the thumbnail size.
8. To add a chart, click **Add a Chart**.

    Add a Chart to your Charts Widget opens.
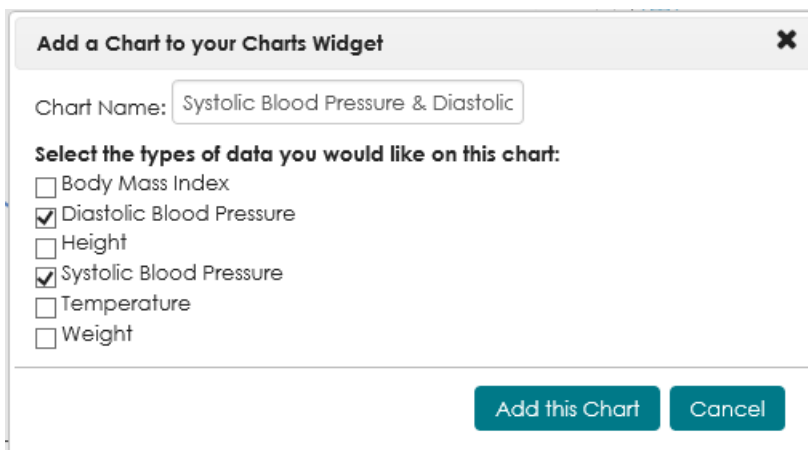
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9. Select the type of data that you want to include in the chart.

    Add any result type or vital sign that has more than three data points. You can also select more than one item for a single chart.

    Chart Name is automatically added by the application, based on the items that you selected.

10. Click **Add this Chart**.

    The new chart is added to the My Charts application.
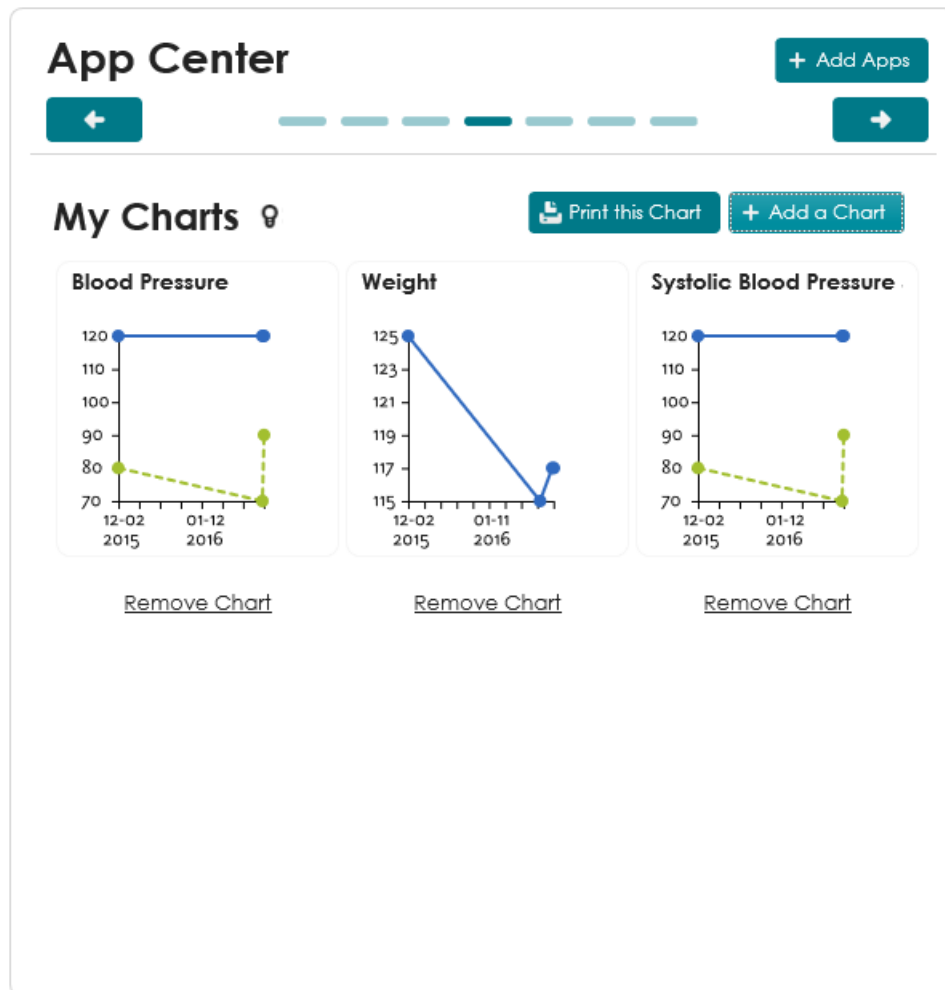
Enter a blood sugar reading

Use the Blood Sugar application to manually enter your blood glucose reading in your FollowMyHealth Personal Health Record account.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **App Center** on the **Home** tab, go to the Blood Sugar application.

3. For **Date Taken**, enter the day that the reading was taken.

   You can use the calendar view to select your date.

4. Enter the time of day that the reading was taken and select **AM** or **PM**.

5. For **Glucose**, enter the blood glucose reading value.

6. For **Tag**, select when the blood glucose reading was taken.

   For example, before a meal, before bed time, before an activity, and so on.

7. Click **Save**.

   A page opens with the message `Blood Sugar result saved`.

8. Click **OK**.

Results of this task

You entered a blood sugar reading. The reading is sent to **My Health > Results**.

Know My Health

Know My Health is a default application in **App Center** that exists for all patients with a FollowMyHealth account. Know My Health provides patient education materials from MedlinePlus that can be printed or emailed.

Know My Health includes a search tool that searches matches by name only, not article content. You can also filter Know My Health by education type, such as **Conditions**, **Medications**, or **Results**. When you click an item in the Know My Health application, associated education content from MedlinePlus opens.

Wellness

Wellness on the **Home** tab directs you to the same information on the **Wellness** tab.

View summary information about your overall wellness, view news and education under **WellnessWire**, view and manage your measurements and goals, and obtain additional educational items that are sent from your connected organizations.

See the related reference to the "Wellness" chapter for more information.

Related concept information
Wellness on page 169

Appointments

Depending on the features that your organization has enabled, you can view, request, schedule, reschedule, and cancel appointments from **Appointments** on the **Home** tab.

> **Note:** If your organization has not enabled appointments to be displayed, and you have no existing appointments in your FollowMyHealth account, then the **Appointments** section of the **Home** page is not displayed.

Appointments contains the following tabs:

Upcoming

This tab includes all future appointments that you have scheduled. View, reschedule, and cancel appointments from the **Upcoming** tab.

Past

> This tab includes all past appointments.

Other

> This tab includes all other appointments, such as canceled appointments or appointments for which you did not show up.

Searching for appointments

Use **Search** with any of the following criteria:

- Provider name
- Provider alias
- Organization name
- Organization brief name
- Appointment type

The search is not case-sensitive and does not depend on status.

Click **Export** to export the appointments to your calendar in an `.ics` file.

When you email, print, or fax your health record data from an appointment, a message informs you that transmitted health data is not encrypted.

Your provider can send you an appointment reminder message through your inbox and include an attached form. The forms are used by your provider to collect information before you arrive for your appointment. Complete the form and click **Submit** to send the form back to your provider.

Schedule an appointment

Directly search your provider's calendar for available appointments or provide your availability preferences and your organization will find an appointment that fits your schedule.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Select **Schedule** from the **Home** tab or **Schedule an Appointment**.

   > **Note:** These options are displayed only if you are connected to at least one organization that allows appointment scheduling.

   An emergency disclaimer is displayed on the window, which advises you to call 911 if this is an emergency.

3. Select your organization.

> **Note:** If you are connected to only one organization, you can skip this step.

4. Select an appointment type.

   > **Note:** This page lists only appointment types that can be scheduled in FollowMyHealth. Your organization might offer additional services that cannot be scheduled through FollowMyHealth.

5. Click **Continue**.
6. Select a provider from the list of your connected providers.

   FollowMyHealth automatically connects you to providers you have seen in the past or with whom you have an upcoming appointment.

   > **Note:** You can select **Find a Provider** to schedule an appointment with a provider who you have not seen before if your organization allows you to schedule with new providers through FollowMyHealth.

   The page displays providers who allow scheduling and the type of appointment type you selected.

   If you do not have an existing provider, you are prompted to find a provider or change the appointment type.

   > **Note:** If providers allow new patients to schedule appointments through FollowMyHealth®, the **Find a provider** is available. Use this option to search for and select a provider with whom you have not had a previous or upcoming appointment.

   a) In **Find a provider**, enter the name of the provider or select ▼ to filter your search criteria.

      Next to the provider's name, you can expand the provider details, which might include:

      • **Biography**
      • **Specialties**
      • **Available locations** (including addresses and telephone numbers)
      • **Get Directions**

   b) Select any of the following options in your search criteria:

      > **Note:** By default, no filters are selected.

      • **Include providers not accepting online appointments from new patients**: When selecting this option, a badge is displayed next to the providers' names when they do not accept online scheduling for new patients.

> **Note:** You must call the provider's office to schedule an appointment.

- **Gender**
- **Specialties**
- **Locations**

c) Click **Apply**.

A list of providers matching your criteria appears. If no results are found, go back and adjust your filter criteria.

> **Tip:** Point to the filter criteria box to display the items that you selected.

d) Select the provider from the search results.
e) Click **Continue**.

7. If your provider allows direct scheduling, do the following:

- Click **Next Available**.
  The next available calendar date is displayed in a single date box under **Choose when and where**. The box displays appointments that are available for this date.
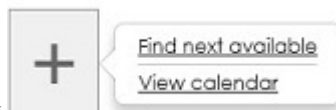
  If you do not want the first available date, click ⊞ and select **Find next available** or **View calendar** to select a date from the calendar.

- Click **View Calendar**.
  When you select a date, the date is shown as a single date box under **Choose when and where**.

a) To view more available dates and times, click the plus sign and select **Find next available** or **View calendar**.

  When you click **Find next available**, the next available date is added automatically to **Choose when and where**.

  If you search for more appointment dates and none are available, a message indicates that no appointment openings are available for that date. You can:

  - Select a different date.
  - Search for the next available appointment on the following calendar day.
  - Select a different provider.
  - Call to schedule an appointment.

- Ask your provider to schedule an appointment for you.

If you cannot find a date and time that matches your availability, click **Can't find a time**. Request appointment dates and times from your provider, who notifies you through a secure message about your scheduled appointment. Refer to Step **8** for more information

b) Select an appointment.

c) For **Why are you scheduling this appointment**, describe your health issue and reason for the visit in up to 40 characters.

d) Click **Schedule Your Appointment**.

> **Important:** If another patient simultaneously reserves an appointment for this time slot, you are notified that the time slot is no longer available, and you must select a new appointment time.

An appointment is reserved and is displayed on your appointments list.

8. If your provider does not allow you to directly schedule an appointment or you selected **Can't find a time**, do the following:

a) Select one or more locations for the visit (this step might not appear).

> **Note:** If your provider supports **Location Preference**, select at least one location where you prefer your appointment.

b) Click **Continue**.

c) From **When do you need an appointment**, select **First Available** or the number of weeks out that you want to schedule the appointment.

d) Select the days that you are available.

You can select a date up to one year in advance.

e) From **Select window of availability**, select **Anytime** or a range of time when you are available.

When you click **After** or **Before**, a time box is displayed. For example, if you are available after 9:00 AM, select **9:00 AM** from the menu.

If you are available for a longer time during the day, click **Between** to set a range of availability. For example, if you are available between 8:00 AM and 5:00 PM, select **8:00 AM** in the first time box and **5:00 PM** in the second time box.

f) Click **Save time preference** for each appointment day and time selection.

The appointment choices are listed in **Date and time preference**.

To add more time preferences, click **Add another time preference**. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon ⊠ next to the list item.

g) When you are done adding appointment dates and times, click **Continue**.

h) Enter the reason for the appointment in **Why are you scheduling this appointment**.

i) Click **Schedule Your Appointment**.

j) Click **Close**.

A message is sent to your provider or organization with your information. The provider or organization reviews the appointment and schedules the appointment based on the availability that you provided. However, the provider might contact you to offer other available times. This process might take several hours to complete. After the provider completes this process, the appointment is displayed in the appointment list.

View upcoming appointments

Future appointments are listed in the **Upcoming** tab located in **Appointments**.

> **Note:** Appointments are displayed on the **Upcoming** tab even after the appointment time, until midnight of the appointment date. After midnight the appointment is moved to the **Past** tab.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From **Appointments**, click **Upcoming**.
3. Select an appointment in the list.
4. Select an appointment.

   The appointment information appears, such as:

   - **Date**
   - **Time**
   - **Location**
   - **Appointment Type**
   - **Organization Name**
   - **Provider Name**
   - provider photo, if available

5. (Optional) Click **Get Directions** for directions and a map to your appointment location.

   A new map and directions appears.

6. (Optional) Click **Add to your personal calendar**.

7. (Optional) Click **Print appointment details**.

   When you email, print, or fax your health record data from an appointment, the transmission is unencrypted. To transmit a secure copy of your health record, export the data from **My Health > Summary > Export**. The exported data is sent through an encrypted email message.

Reschedule an appointment

Reschedule appointments if you have a schedule conflict or are unable to attend the appointment.

1. Sign in to the FollowMyHealth® Personal Health Record.

2. From **Appointments**, click **Upcoming**.

3. Select an appointment in the list.

4. Select an appointment.

5. Click **Reschedule**.

   The organization and provider automatically appear based on the original appointment and cannot be changed.

   If the time has passed to rescheduled appointments, a message appears instead of appointment preferences. You must call your provider to reschedule the appointment.

6. Select a location.

   > **Note:** If your provider and appointment types support **Location Preference**, select at least one location where you prefer your appointment.

7. Click **Continue**.

8. From **When Do You Want the Appointment**, select the check box preceding the day of week that you want the appointment.

9. From **Select window of availability**, select a time and availability.

   You can select a date up to one year in advance.

10. Click **Add This Time Slot** for each appointment day and time selection.

    The appointment choices are listed in the box. You can add multiple appointment dates and times.

11. Click **Submit**.

    A message reminds you that the requested appointment is not scheduled until the appointment is posted in your health record and the provider sends a confirmation email.

12. Click **OK**.

A secure message is sent to your provider requesting to reschedule the appointment. A **Pending Reschedule** label is displayed with the appointment on the **Upcoming** tab until the appointment is confirmed.

Cancel an appointment

Cancel appointments in the **Upcoming** tab located in **Appointments** on the **Home** tab.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Select an appointment from the **Upcoming** tab.

   Appointment Details appears.

3. Click **Cancel**.

   Cancel Appointment appears.

   If the time has passed that the organization allows to cancel appointments, a message appears instead of **Cancel Appointment**. You must call your provider to cancel the appointment.

4. Enter a reason in the comments box to explain why you want to cancel the appointment and click **Submit**.

   The cancellation request is sent to your provider. A **Pending Cancellation** label displays with the appointment on the **Upcoming** tab until the appointment is canceled.

View past appointments

Past appointment information is listed in the **Past** tab, located in **Appointments** on the **Home** tab.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From **Appointments**, click the **Past** tab.
3. Select an appointment in the list.

   Appointment Details appears, showing clinical details or documents associated with this appointment.

4. (Optional) Select **Documents** or **Clinical Data**, or both, to print a summary of your appointment details.

5. Click **Print**.

   When you email, print, or fax your health record data from an appointment, the transmission is unencrypted. To transmit a secure copy of your health record, export the data from **My Health > Summary > Export**. The exported data is sent through an encrypted email message.

Get Treated Now

Get Treated Now is only available on the **Home** tab if your organization has the telehealth features enabled.

If your organization has these telehealth features turned on and **Get Treated Now** displays on your **Home** tab, you can talk to a doctor in either of the following ways.

- Click **Start a Video Visit**
- Click **Start an Email Visit**
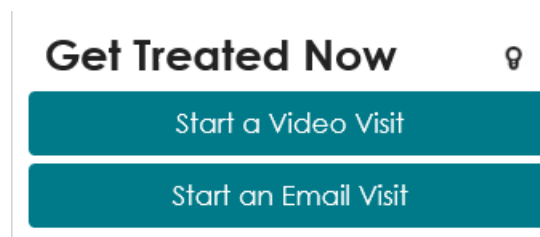
See the related topics, "On-demand video visits" and "Email Visits" for more information about these offerings.

Related concept information
On-demand video visits on page 199
Email visits on page 225

Resource Center

The **Resource Center** in the Home screen is a place to display custom educational or quick links to patients, that are either a link to a webpage or a single sign-on (SSO) link to another third-party application. It is similar in concept to the **Custom Apps** that can already be displayed under Health Tools (found in the App Center), but the Resource Center links are designed to be easier for users to find.

The **Resource Center** is displayed in the Home screen between **Get Treated Now** and **Billing**. If there are no resource center records the section is collapsed.
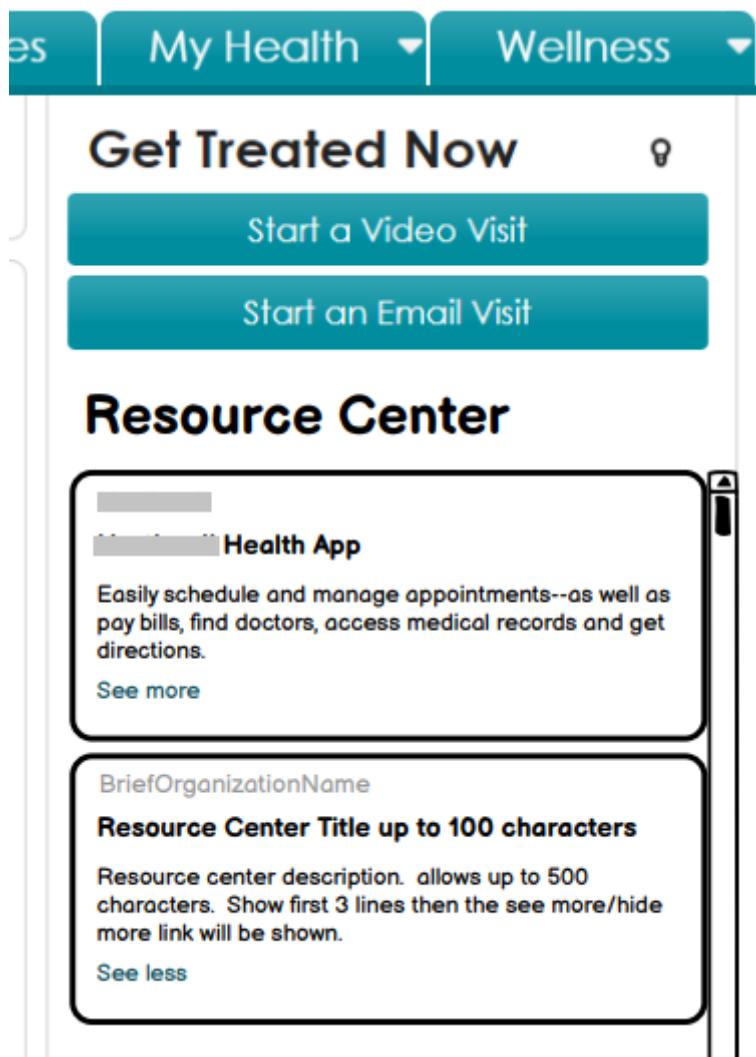
Resource Center card view

A list is displayed showing all resource center records in a card view for all connected organizations for the patient or authorized individual, grouped by the brief organization name. Groups are sorted by organization name alphabetically, then the resource center records within the group are sorted alphabetically by title. Note that the sorting is based on English text so it does not change if the user toggles to Spanish. Users can scroll through the cards in the Resource Center.

Each card includes the brief organization name, title, and the first 3 lines of the description. If the description is longer than three lines then users can click a **See more** and **See less** toggle.

Users can move the cursor over a card to highlight it, and click the card to show the "You are leaving FMH" message. When users click **OK**, the URL for the associated Resource Center item is opened in a new tab of the user's default browser.

Authorized Individuals must have full access to view a card if **Allow Authorized Individuals** is checked in the Resource Center Configuration record (in the FMH Dashboard).

> **Note:** Authorized individual access is configured by each organization. Only resource center cards for the patient record currently selected in FMH are shown. The display does not show all patients to whom the signed in user has access in a single view.

For more information

For more information on configuring Resource Center items, see the *FollowMyHealth Dashboard User Guide*.

Billing on the Home tab

Billing is only available on the **Home** tab if your organization has online bill pay turned on.

The charges and amount due display under **Billing**. The information is organized by **Billing Group** and **Amount Due** and is updated with the first sign-in of the day.

To view your invoices or make a payment, click **Details**.

> **Note:** Depending on how your organization configures their billing, you might see the following message after you click **Details**. After you click **Continue** you are taken to the provider's billing site.
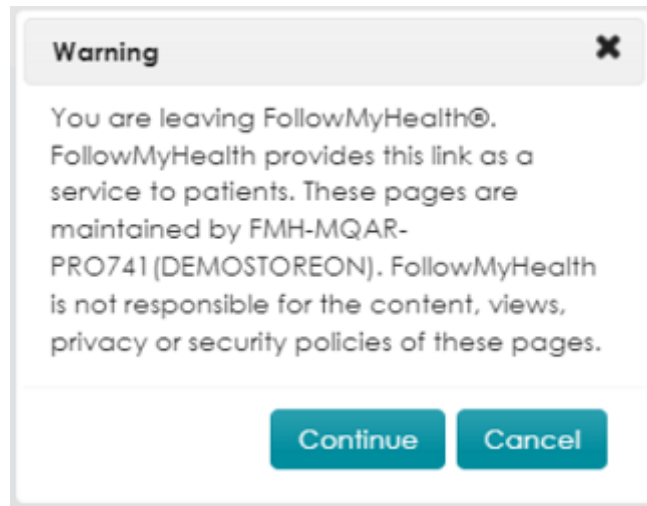
The **Billing** tab is opens with **Patient Responsibility** expanded.

Billing - ▓▓▓▓ ▓▓▓ ▓▓▓ ▓▓▓▓
Pediatrics

Billing Group: | Pediatrics ▾ |

Expand All

If you have questions or need assistance please contact our Billing Department at ▓▓▓▓ .

▾ **Patient Responsibility (0)**

> No Current Invoices

▾ **Pending With Insurance (0)**

> No Current Invoices

▾ **Paid Invoices (32)**

Date	Invoice	Patient	Provider	Procedure	Charges
10/13/2017	11439450			Prev Visit, Est, Age...	$305
8/23/2017	11479590			Office/Outpatient Vi...	$140
3/10/2017	10868950			Office/Outpatient Vi...	$140
10/7/2016	10116620			Prev Visit, Est, Age...	$315
4/10/2015	7659080			Prev Visit, Est, Age...	$257
11/21/2014	7113640			Office/Outpatient Vi...	$229
3/13/2014	6221220			Prev Visit, Est, Age...	$708
3/1/2013	4972260			Prev Visit, Est, Age...	$236
10/24/2012	4511550			Office/Outpatient Vi...	$228
4/20/2012	3935980			Office/Outpatient Vi...	$105
3/9/2012	3813970			Specimen Handling	$16
3/6/2012	3801050			Office/Outpatient Vi...	$155
10/14/2011	3323670			Prev Visit, Est, Age...	$435
3/15/2011	2768180			Office/Outpatient Vi...	$105
1/14/2011	2552670			Prev Visit, Est, Age...	$467
1/5/2011	2541570			Office/Outpatient Vi...	$105

Expand other tabs to view billing details.

Devices and applications

Devices & Apps is a device application library that you can use to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account.

Browse **Available Health Sources** to find devices and applications that are compatible with FollowMyHealth, such as Fitbit, Garmin, iHealth®, and Withings. After you complete the connection process, the health source displays under **Your Connected Health Sources**.

> **Tip:** If you are monitoring your blood pressure with the **A&D Blood Pressure Monitor**, connect your FollowMyHealth account to a Garmin Connect account. After these accounts are connected, you can search for

and pair your A&D Blood Pressure Monitor to the Garmin Connect mobile app, and then your blood pressure readings can be viewed in your FollowMyHealth account.

Devices & Apps provides several ways to access more information about the types of products that can connect with FollowMyHealth. Look under **Devices & Apps** to find information about supported products, how to purchase products, and a quick guide to connect the applications and devices.

Learn more about devices and applications

Click **Learn more about Health Sources** to open a quick reference about devices and applications.

Visit product website

Click **Visit product website** from any connected health source to access the product website, where you can purchase devices and learn more about the products.

Supported products and services

Click **Supported products and services** from any connected health source to view a list of devices that are supported by FollowMyHealth. Click **Hide Supported products and services** if you do not want the list expanded in **Devices & Apps**.

Access devices and applications from My Account

Access **Devices & Apps** from the FollowMyHealth Personal Health Record **My Account** menu.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account. When you use the devices to take vital sign measurements, the readings are viewable in the FollowMyHealth Personal Health Record. A list of your most recent readings is available on the **Home** tab.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the FollowMyHealth Personal Health Record, click **My Account > Connections**.

    Connections opens.

3. Click **Health Sources: Personal Monitoring Devices and Apps**.

    Health Sources: Personal Monitoring Devices and Apps expands.

Results of this task
You have accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

Access devices and applications on the Home tab

You can access **Devices & Apps** from the FollowMyHealth Personal Health Record **Home** tab.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account. When you use the devices to take vital sign measurements, the readings are viewable in the FollowMyHealth Personal Health Record. A list of your most recent readings is also available on the **Home** tab.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From **Devices & Apps** on the **Home** tab, click **Devices & Apps**.

> **Note:** If you are not connected to at least one health source, click **Connect a Health Source**. You are directed to **Connections** where you can view available devices and applications.

Connections opens and **Health Sources: Personal Monitoring Devices and Apps** is expanded.

Results of this task
You accessed **Devices & Apps**.

What to do next

You can now view readings, remove connections, add connections, learn more about devices and applications, or access product web sites for devices.

Access devices and applications from a goal

Access **Devices & Apps** from your active goals in the **Goals** tab.

Before you begin
The **Goals** tab only displays if your provider has set a goal for you.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account. When you use the devices to take vital sign measurements for your goal, the readings are viewable in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click the **Goals** tab.
4. Click **Manage Devices & Apps**.

    Connections opens and **Health Sources: Personal Monitoring Devices and Apps** expands.

Results of this task
You accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

Connect to devices and applications

Add and remove connections for devices and applications.
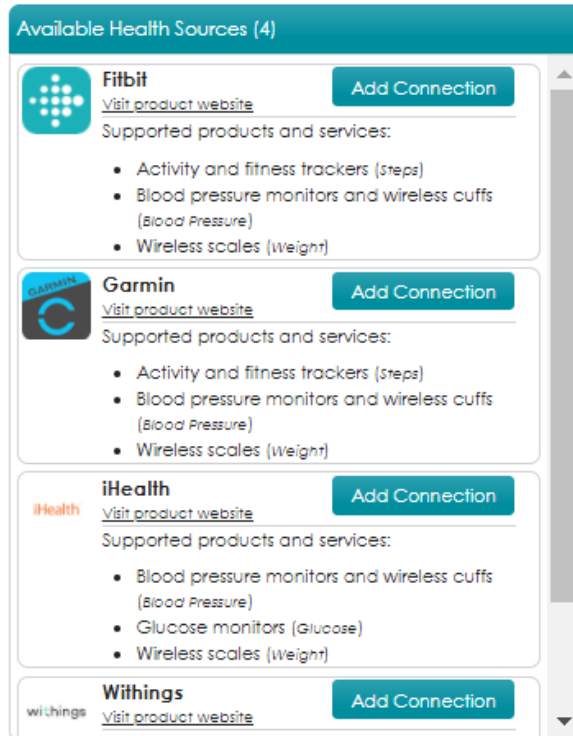
To connect to a specific health source, refer to the instructions for each health source that is supported by FollowMyHealth.

View available devices and applications from **My Account > Connections > Health Sources: Personal Monitoring Devices and Apps > Available Health Sources**. The number of devices and applications is listed next to the **Available Health Sources** label.

After you add a health source, the health source displays in **Your Connected Health Sources** and the number of connected health sources is listed next to the **Your Connected Health Sources** label.

To disconnect a health source, click **Remove Connection** from the health source in **Your Connected Health Sources**. Click **Yes** in the confirmation page, to confirm that you want to remove the connection.

The health source connection is removed, and you cannot add new data to the FollowMyHealth Personal Health Record with the health source application. However, you can view the historical data and can restore the connection.

If a health source is no longer supported by FollowMyHealth and is removed from **Devices & Apps**, a message is displayed in **Your Connected Health Sources**. Click **OK, I got it** to remove the message.

The historical data that is collected by the health source remains available in your health record. You can continue to use the devices and applications, but the data is not sent to your FollowMyHealth Personal Health Record account.

Connect a Fitbit health source

The Fitbit health source provides a link between FollowMyHealth and your personal Fitbit device. Track your daily steps with the Fitbit tracker and weight with the Fitbit scale. The data is uploaded to your FollowMyHealth Personal Health Record account.

Before you begin

You must purchase a Fitbit device. Click **Visit product website** from the Fitbit health source in **Devices & Apps** to access the Fitbit store.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

3. Expand **Health Sources: Personal Monitoring Devices and Apps**.

   View your connected devices, applications, and available health sources.

4. From **Available Health Sources**, find the Fitbit health source and click **Add Connection**.

   My Fitbit account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** is displayed for you to create an account.

5. Sign in with the username and password created when you opened your Fitbit account.

   Authorize FollowMyHealth opens.

6. Follow the steps provided by the Fitbit web page to connect your device.

Results of this task

The Fitbit device is connected to FollowMyHealth.

The Fitbit health device is listed under **Your Connected Health Sources**.

Connect a Garmin health source

The Garmin health source provides a link between FollowMyHealth and your personal Garmin device. You can track a variety of fitness and health data that is automatically uploaded to the FollowMyHealth Personal Health Record.

Before you begin

You must purchase a Garmin device. Click **Visit product website** from the Garmin health source in **Devices & Apps** to access the Garmin store.

1. Sign in to the FollowMyHealth Personal Health Record.

2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

3. Expand **Health Sources: Personal Monitoring Devices and Apps**.

   View your connected devices, applications, and available health sources.

4. From **Available Health Sources**, find the Garmin health source and click **Add Connection**.

   My Garmin account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** displays and you can create an account.

5. Sign in with the username and password that you created when you created your Garmin account.

   Authorize FollowMyHealth opens.

6. Follow the steps provided by the Garmin web page to connect your device.

Results of this task

The Garmin device is connected to FollowMyHealth.

The Garmin health device is listed under **Your Connected Health Sources**.

Connect an iHealth health source

Use the iHealth® health source to access weight, blood pressure, and blood glucose measurements from your FollowMyHealth Personal Health Record account.

Before you begin

You must purchase an iHealth® Labs device. Click **Visit product website** from the iHealth® application in **Devices & Apps** to access the iHealth® Store.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.

3. Expand **Health Sources: Personal Monitoring Devices and Apps**.

   View your connected devices, applications, and available health sources.

4. From **Available Health Sources**, find the iHealth® health source and click **Add Connection**.

   iHealth Labs Login opens.

   Follow the instructions from the iHealth® web page to complete the connection.

Results of this task

The iHealth® health source is connected to FollowMyHealth.

The iHealth® health source is listed under **Your Connected Health Sources**.

Connect a Withings health source

The Withings health source provides a link between FollowMyHealth and your personal Withings device. You can measure your vital signs and the data automatically uploads to the FollowMyHealth Personal Health Record.

Before you begin

You must purchase a Withings device. Click **Visit product website** from the Withings health source in **Devices & Apps** to go to the Withings Store.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.

   Connections opens.
3. Expand **Health Sources: Personal Monitoring Devices and Apps**.

   View your connected devices, applications, and available health sources.
4. From **Available Health Sources**, find the Withings health source and click **Add Connection**.

   My Withings account opens.

   If you do not have an account, click **Don't have an account yet**. **Account Creation** is displayed, and you can create an account.
5. Sign in with the username and password that you created when you created your Withings account.

   Authorize FollowMyHealth opens.
6. Follow the steps provided by the Withings web page to connect your device.

Results of this task

The Withings health source is connected to FollowMyHealth.

The Withings health source is listed under **Your Connected Health Sources**.

Device list

Wireless devices, such as weight scales, fitness trackers, blood pressure cuffs, and blood glucose monitors, enable you to automatically import weight, blood pressure, and glucose readings into the FollowMyHealth Personal Health Record.

Each device has an application in **Health Sources** that integrates the device with FollowMyHealth.

Device Source	Supported data types	FollowMyHealth integration
Fitbit®	Blood pressure, Steps, and Weight measurements	Daily readings are imported into FollowMyHealth
Garmin®	Blood pressure, Steps, and Weight measurements	Daily readings are imported into FollowMyHealth
iHealth®	Blood pressure, Glucose, and Weight measurements	Daily readings are imported into FollowMyHealth
Withings®	Blood pressure, Steps, and Weight measurements	Daily readings are imported into FollowMyHealth

See the following links for more information about these supported device sources.

Fitbit®

>   **https://www.fitbit.com/store**

Garmin®

>   **https://apps.garmin.com/en-US/**

iHealth®

>   **http://www.ihealthlabs.com/store/**

Withings®

>   **http://www.withings.com/us/en/store**

Chapter 6

Messages

The **Messages** tab contains all secure messages that are sent to and received from organizations that are connected to your healthcare record.

Common options are **Forward** and **Reply**. Providers to whom you want to forward messages or to whom you need to reply must have these options enabled. You can also add attachments to email messages, and print, move, and delete messages.

The default folders in **Messages** are **Inbox**, **Sent**, **Outbox**, and **Trash**. You can create folders, nest multiple folders, and edit existing folders.

Messages are sent to the **Outbox** after you click **Send**. Your message is displayed in **Outbox** until the message is delivered. After the message is delivered, the message is moved to **Sent**. If the message fails, the FollowMyHealth Personal Health Record attempts to resend it for 24 hours. If the message is unsuccessful after 24 hours, the message is removed from **Outbox** and a Message Delivery Failure message is sent to your Inbox. You can send a new message or contact your provider using a different method.

If the message includes forms to complete, the forms are attached to the message. If the due date for any forms has expired, the attached form is unavailable and cannot be opened.

Messages from Sunrise with attachments

Messages from the Sunrise EHR application that have attachments are indicated as such in FollowMyHealth® Personal Health Record. A paper clip icon is displayed next to any messages on the **Messages** screen that have one or more attachments. Patients (and authorized individuals) can view those attachments.

> **Note:** At this time, this feature is available only for Sunrise EHR v21.0 or later. Attachments can only be images files, and can have multiple pages in a single attachment.
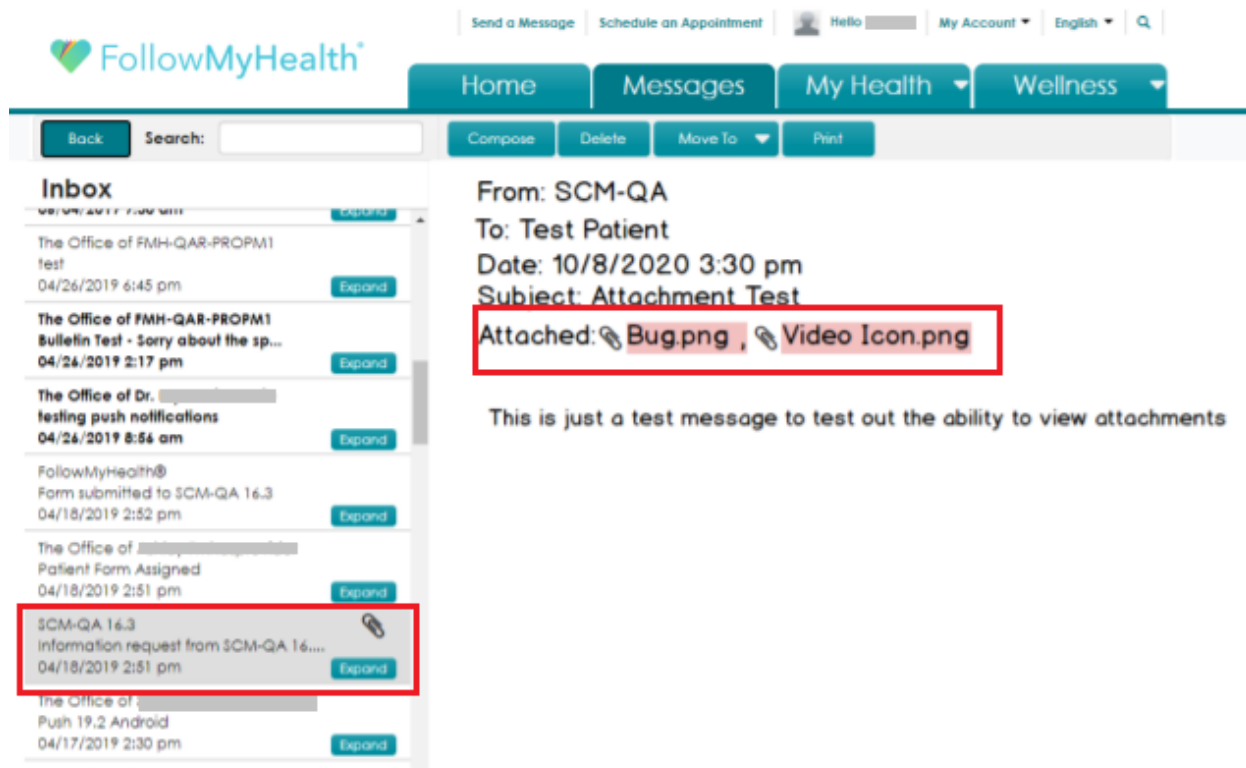
When users click to view the message, a button on the message indicates how many attachments there are. If there is more than one attachment, clicking this button opens the **Attachments** screen that lists the attachment names. Clicking an attachment from this list opens the viewer. If there is only one attachment, clicking the button opens the attachment viewer.
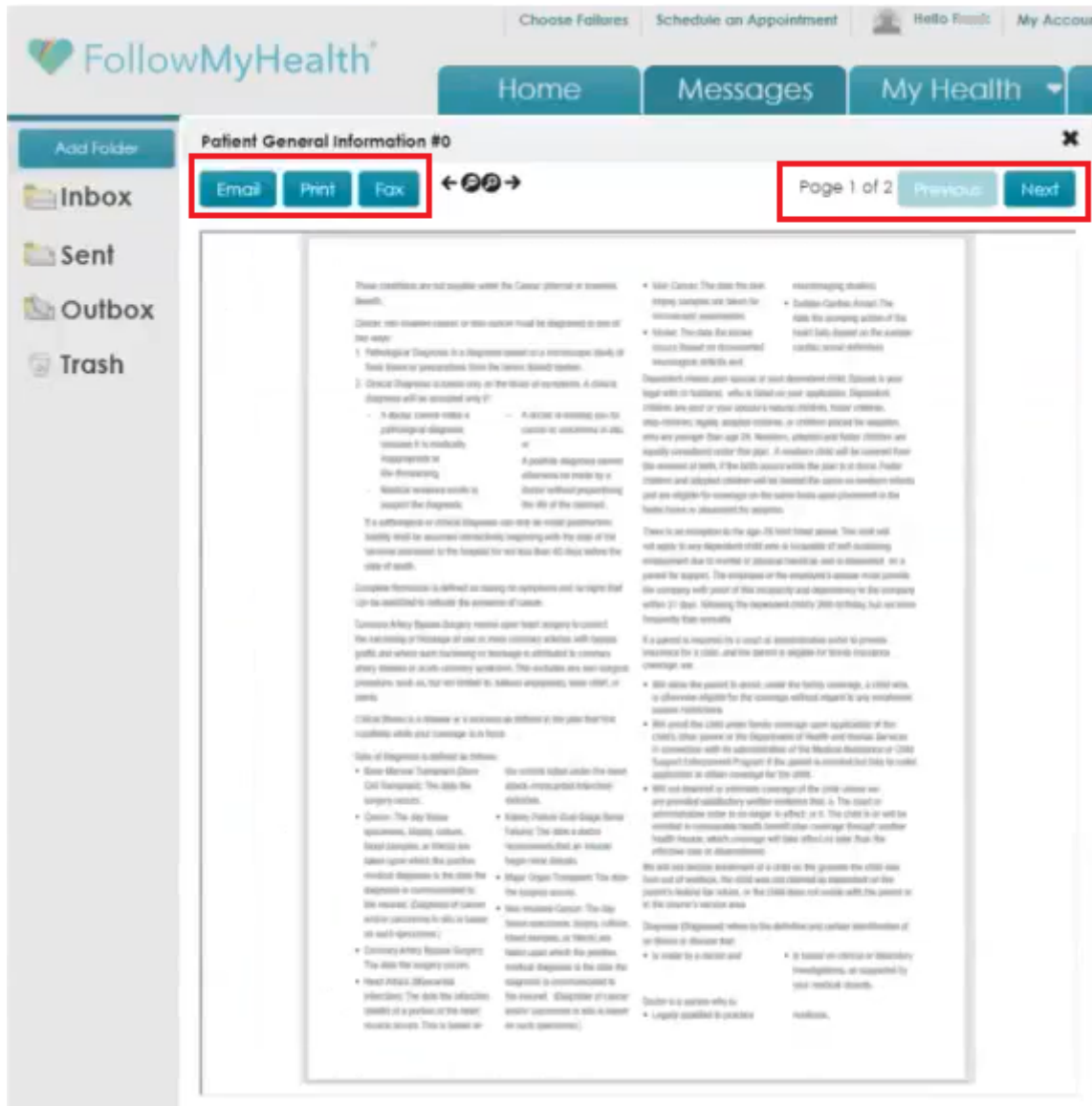
Users can view, email, print, or fax the attachment from their Inbox in FollowMyHealth® Personal Health Record (at this time users can only view these attachments in FollowMyHealth® Mobile). Users can also navigate between pages using **Previous** and **Next** for attachments with multiple pages.

> **Note:** If patients delete a secure message with attachments, the attachments are also deleted.

Compose a secure message

Create and send secure messages to communicate with your healthcare provider or other non-physician providers.

Before you begin
Some healthcare providers or non-physician providers might not be available for messages. If the provider is not displayed when you attempt to compose a message, your organization has not enabled the provider for messaging.

> **Important:** If your healthcare organization has enabled attachments, you can send your provider attachments, such as forms, in your messages. Forms cannot be changed after they are sent to providers. If you send a form to a provider, a page opens after you click **Send** to confirm that you want to send the form.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click **Send a Message** in the static toolbar, or click the **Messages** tab and then click **Compose**.

    Compose Secure Message opens. An emergency disclaimer is displayed, which advises you to call 911 if this is an emergency.

3. (Optional) Click **Dismiss**.
4. If you are connected to multiple organizations that allow secure messaging, select an organization from the list.

    Select the organization to which to send your message. A check mark is displayed next to the selected organization. Click **Continue**.

    If you are connected to only one organization that allows secure messages, this list is not displayed.

5. Click **Continue**.

    If the organization that you selected has enabled and configured it, a secure message alert is displayed to advise you of things to be aware of when composing a secure message. For example, the organization might be receiving a high volume of secure messages, and it might take some time before you receive a response. The message might direct you to other means of engaging the organization, such as with a scheduled video visit, or provide you with additional contact information if you need assistance sooner.

    > **Note:** If you are composing a message to a specific provider from **My Account > Connections**, the organization and provider are already selected, so this secure message alert, if configured, is the

first screen that is shown. The **Choose Organization** and **Choose Provider** screens are not shown.

6. Read the secure message alert and then click **Continue**.

   If you are connected to multiple organizations that allow secure messaging, you can also click **Back** to return to the previous screen, otherwise the **Back** button is not displayed.

   A list is displayed showing the providers for the selected organization who allow secure messages from patients.

7. Click the provider to whom you are sending the message.

   A check mark is displayed next to the provider.

8. Click **Continue**.

   Compose Secure Message displays the selected organization and the provider to whom the message is addressed.

9. For **Subject**, enter the reason for your message.

10. Enter the content of the message in the **Message** box, up to 1000 characters.

11. (Optional) If this is a billing question, click **Billing Question**.

12. (Optional) Add up to five attachments in the **Attachments** box.

   > **Note:** You can add attachments only if your healthcare organization has this feature enabled. The **Attachments** box is not displayed if your healthcare organization does not support attachments.

   a) Click **Click here to attach a file** in **Attachments**.

   b) Browse for the file to attach.

   c) Select the file.

   You can add up to five files and up to 8MB per file. Acceptable file types include JPG, JPEG, PNG, and PDF file types.

   > **Note:** PDF files are scanned for malicious content during upload.

   The file(s) are added to **Attachments**.

   To remove an attachment, click the delete icon on the attachment image.

13. Click **Send**.

   You can also click **Back** to return to the previous screen.

   If you are sending a form, you receive a message informing you that you cannot change the form after it is sent. Click **Send**.

Create and edit Message folders

You can create and edit folders to store and organize your messages in the FollowMyHealth Personal Health Record.

1.   Sign in to the FollowMyHealth Personal Health Record.
2.   Click the **Messages** tab.
3.   Click **Add Folder**.
4.   Enter the name of the folder in **What would you like to name this folder**.
5.   Click **OK**.

     The new folder is listed under the **Inbox** folder.

6.   To edit a folder, click **Edit Folder**.

     You can delete, rename, or move the folder.

7.   Select the folder to edit.

     The edit icons are displayed.

8.   Click **Done**.

Results of this task

You created and edited a **Messages** folder.

Chapter 7

My Health

The **My Health** tab contains all information about your healthcare, including conditions, medications, allergies, immunizations, test results, vital signs, and documents. You can also make a list of your providers from **My Health**.

View a summary of all of your **My Health** information on the **Summary** tab, or access each section by clicking the other tabs under **My Health**.

From the **Summary** tab, you can email, print, and export your clinical information by clicking **Send** and selecting from the following options:

- Select **Email** to send an *unencrypted* summary of your clinical information to a specified email address.
- Select **Email All** to send an *unencrypted* copy of ALL of your clinical information to a specified email address.

    CAUTION: This can be many pages.

- Select **Print** to send an *unencrypted* copy of the summary to a specified printer.
- Select **Print All** to print an *unencrypted* copy of ALL of your clinical information to a specified printer.

    CAUTION: This can be many pages.

    To print individual PDF documents, you must open the document and use the available print options.

- Select **Export** to download or transmit your clinical information in an *encrypted* format. You can save this file to your hard drive or external storage device such as a USB drive, or you can send it to a specified email address.

    Note: When using this option you also create a password that you must share with the recipient to enable them to open the file.

From any of the other tabs under **My Health**, you can email, print, or fax that section of your clinical information by clicking **Send** and selecting from the following options:

- Select **Email** to send an *unencrypted* copy of the clinical information to a specified email address.
- Select **Print** to send an *unencrypted* copy of the clinical information to a specified printer.
- Select **Fax** to send an *unencrypted* copy of the clinical information to a specified recipient and fax number.

‖ **Note:** This option is not available for Documents.

Summary

The **Summary** tab on **My Health** provides a current snapshot of your active medical information.

Complete the following tasks from the **Summary** tab.

- Print a copy of your summary or all of your clinical information to share with your provider, carry with you in case of an emergency, or keep on file at your home.
- Send an unencrypted copy of your summary or all of your clinical information to a specified email address.
- Import or export your health record file or clinical documents from your FollowMyHealth Personal Health Record account.

These sections are available on the **Summary** tab and display the following information:

Demographics

Your picture, name, date of birth, and address. This information is collected from the **My Info** tab. To change your picture, click **New Photo**.

My Care Team

Your list of primary providers. The list includes the name of your provider, a note about the provider or nurse specialty, and contact information.

Diagnoses

Your active conditions, if any, from the **Conditions** tab of **My Health**.

Surgical History

Your surgical history conditions, if any, from the **Conditions** tab of **My Health**.

Allergies

Your active allergies, if any, from the **Allergies** tab of **My Health**.

Medications

Your current medications, if any, from the **Medications** tab of **My Health**.

Recent Vitals

The most current values, if any, for height, weight, and body mass index (BMI).

Manage your care team list

The **My Care Team** list on the **Summary** tab provides a quick contact list of your most frequently used healthcare providers.

The list is available on the **Summary** tab. Print the list to carry with you in case of emergency or to share with your other providers. You can also remove providers from the list and edit the provider information.

> **Note:** You can view participating providers at **My Account > Connections > My Providers and Healthcare Organizations**. **My Care Team** is intended as a quick reference.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Summary** tab.
4. Click **Add Provider**.
5. Enter the provider's name, the type of service provided or other information that distinguishes the provider from other providers (in the **Tag** field), and the provider's contact information.
6. Click **Save**.

   The provider is listed in **My Care Team**.

7. To delete a provider from **My Care Team**, click .
8. Click **Yes**.

9. To edit the provider information, click .

   Add Preferred Provider opens.

10. Edit the information and click **Save**.

Results of this task
You added a provider to **My Care Team**, edited a provider, and deleted a provider.

Import clinical summary documents

Add a clinical summary document to your health record by importing a document from your provider.

You can add any HL7 Clinical Document Architecture-compliant .xml file, such as a continuity of care document (CCD) or clinical summary document, to your healthcare record. These documents

are provided by most healthcare organizations and can often be exported from personal health records and patient portals.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Summary** tab.
4. Click **Import**.
5. From **Choose File**, browse for the file to import.
6. Click **Import**.

Results of this task

Your document is imported.

When you import a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

Email clinical summary documents

You can email your clinical summary information to your provider or other interested party.

You can choose to email just a summary of your health information, similar to what is shown under the **Summary** tab, or you can choose to email your entire health record, including health conditions, procedures, medications, allergies, immunizations, vitals, results, and documents.

> **Note:** This information is not encrypted. To encrypt this information, use the **Export Clinical Documents** option.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Summary** tab.
4. Click **Send > Email** to send a summary of your health record.

   To send your entire health record, click **Send > Email All**.

5. Enter the destination email address to send your health information.

   Note that you are authorizing the transfer of an unencrypted copy of your health information to a printer, external storage device, or third party, and that Veradigm is no longer responsible for how this information is used or disclosed.

6. Click **Send** to send the email or click **Cancel** to cancel the send request.

Results of this task

Your clinical summary information is sent through email.

When you transmit a clinical summary document, an event is logged at **My Account > Preferences > Activity History Log**.

Print clinical summary documents

You can print your clinical summary information to a designated printer.

You can choose to print just a summary of your health information, similar to what is shown under the **Summary** tab, or you can choose to print your entire health record, including health conditions, procedures, medications, allergies, immunizations, vitals, results, and documents.

> **Note:** This information is not encrypted. To encrypt this information, use the **Export Clinical Documents** option.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Summary** tab.
4. Click **Send > Print** to print a summary of your health record.

    To print your entire health record, click **Send > Print All**.

    Note that you are authorizing the transfer of an unencrypted copy of your health information to a local printer, and that Veradigm is no longer responsible for how this information is used or disclosed.

5. Click **Print** to print the information or click **Cancel** to cancel the print request.
6. Specify the destination printer and any other settings, and click **Print**.

Results of this task

Your clinical summary information is sent to the designated printer.

When you print a clinical summary document, an event is logged at **My Account > Preferences > Activity History Log**.

Export clinical summary documents

You can save clinical summary documents on your local computer directory or external hard drive by exporting clinical summary documents from your health record.

Documents are exported as HL7 Clinical Document Architecture-compliant .xml files (for example, a continuity of care document (CCD)). You can save these files to your hard drive or external storage device, such a USB drive. When you export your information, you can encrypt and

password-protect the information, but you must share the password with the recipient or they cannot open the file.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Summary** tab.
4. Click **Send > Export Clinical Documents**.

   Export Clinical Document is displayed.

5. Select either **Download to this computer or an external storage device** or **Transmit via email** and click **Continue**.

   Download Clinical Document is displayed, showing a list (if available) of clinical documents that are available to be exported. an option to **Select All** documents is available, as well as several options to filter the document list by a specific date or date range.

   Note that you are authorizing the transfer of a copy of your personal health record to an external storage device or third party, and that Veradigm is no longer responsible for how this information is used or disclosed.

6. Search for documents to export by filtering by date.

   - Select **Specific Date** to search for a document on a specific date. Click the blank box to open the calendar tool, select the date from the calendar tool, and then click **Apply**.
   - Select **Date Range** to search for a document from a range of dates. Click the blank box to open the calendar tool, select a date range, and then click **Apply**.

   The documents that match the filter results are listed in the right pane.

7. Click **Select All** to select all documents that are listed in the right pane or select one or more documents from the list to export.

   The files are packaged in a `.zip` file.

8. If you are downloading the information, complete the following steps:

   a) Click **Download** and select a file or document type.
   b) To download your health information as a document, select **Download as a Document (HTML) file**.
   c) To download your health information as a CCD (XML) file, select **Download as a CCD (XML) file**.
   d) Save the file or document to your local drive.

9. If you are transmitting via email, complete the following steps:

   a) Enter the destination email address where the information is to be sent.
   b) (Optional) If you want to encrypt the information in the email, select **Encrypt** and enter a password that the recipient will need to access the information.

> **Note:** Make note of this password and be sure to give it to the recipient.

c) Click **Send** and select a file or document type.

d) To send your health information as a document, select **Send as a Document (HTML) file**.

e) To send your health information as a CCD (XML) file, select **Send as a CCD (XML) file**.

Results of this task

Your document is exported.

When you export a clinical summary document, the history is logged at **My Account > Preferences > Activity History Log**.

Export All My Data

Patients and authorized individuals with full access can initiate the export of all of the patient's electronic health information (EHI) stored in FollowMyHealth. This includes patient-entered data as well as data received from connected Provider source systems.

> **Note:** At this time, this function is supported only on the FMH web browser application and not the FMH mobile apps.
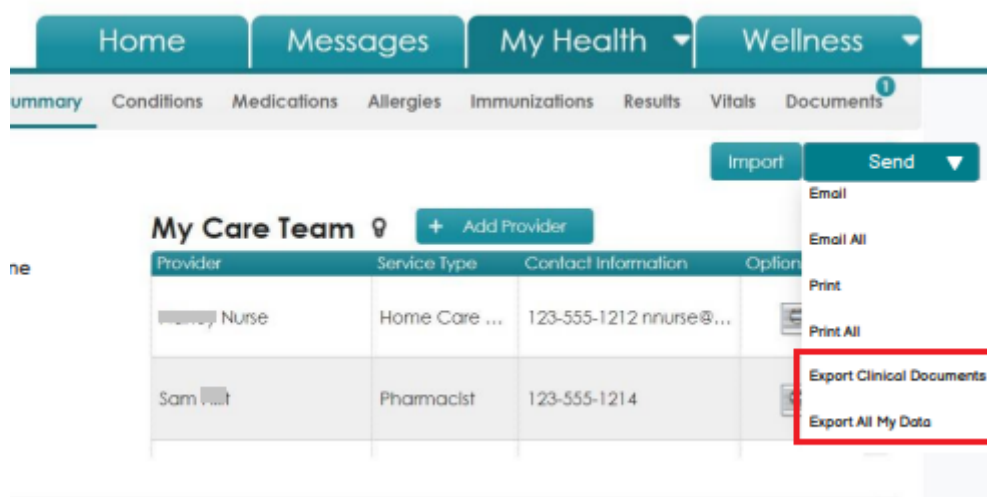
You can save this information to your hard drive or external storage device, such a USB drive.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **My Health** tab.

3. Click the **Summary** tab.

4. Click **Send > Export All My Data**.

    A check is made for the existence of a valid EHI Export file.

    > **Note:** Once generated, the EHI Export file is available for downloading for 48 hours. EHI export files are deleted as part of a daily batch job 48 hours after they were created.
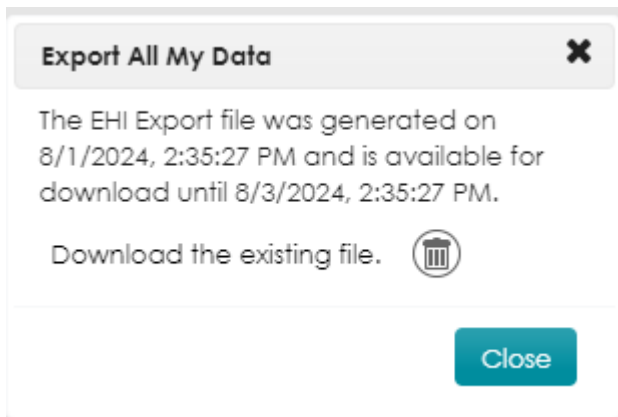
    - If there is a file that has been generated and is ready for downloading, the **Export All My Data** window is displayed, giving you the options to either download the file or delete it.
      If you click the trash can icon, the **Delete** popup is displayed with a message indicating it is a permanent deletion with the options to keep the file or confirm the delete request. If you opt to delete the file, it is permanently removed from storage and is no longer accessible and the **Delete** popup is closed. The Activity History event, "EHI Export File Deleted" is logged.
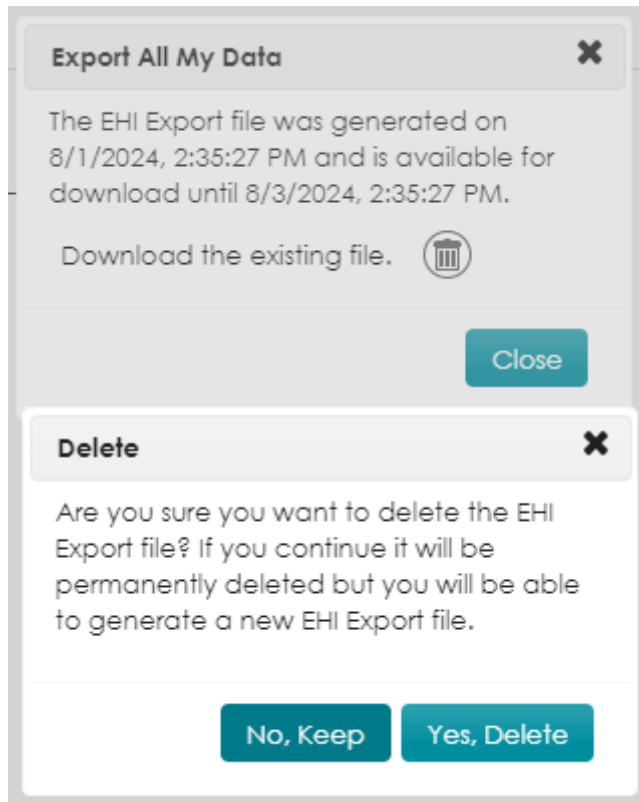
If you opt to keep the file, it is kept (with the original 48 hour life cycle) and the **Delete** pop up is closed. If you do not delete the file, it is deleted automatically after 48 hours. You can click the link to download the file or close the **Export All My Data** window.

When you click the **Download the existing file** link, another window is displayed with more information about the download, with options for you to continue the download process or cancel. If you proceed, the file is downloaded to your local machine. The Activity History event, "EHI Export File Downloaded" is logged when the file is downloaded.

- If there is a file that is currently processing, the **Export All My Data** window is displayed, showing a spinner indicating that the file is processing.

Personal Health Record User Guide
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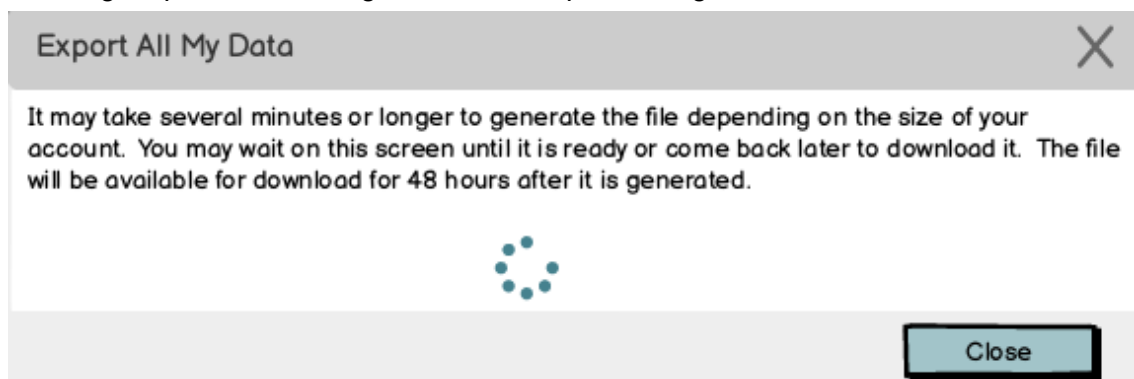
You can either remain on that window or close it. If closed, you must click the drop-down under the **Send** button to check the status of the export file. If you remain in the window, once the file is ready for downloading the window updates to the Ready state with a link to download or delete the file as described above.

- If there is no file processing or available for downloading, the **Export All My Data** window is displayed, with information about the export process.
  You can click **Continue** to proceed with the export, or **Cancel** to cancel the export request.
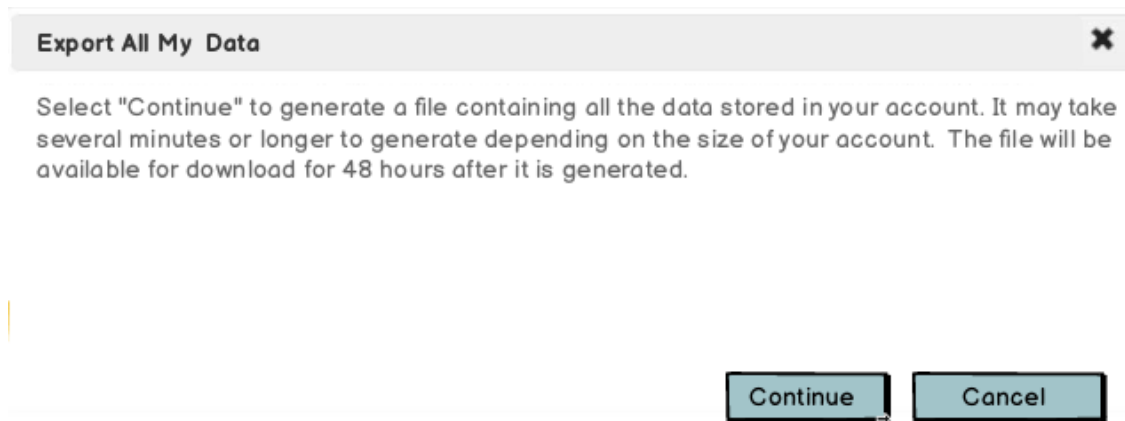
If you continue by clicking **Continue** the EHI Export process begins and the window status updates to processing. The Activity History event, "EHI Export File Initiated" is logged.

Once a file is generated, the window updates to the state of ready for download. The file is available for downloading for 48 hours from the date and time it was created. This file contains all of the information in the patient's FMH account.

Conditions

Conditions are known problems or diagnoses. Track your active conditions, past medical history, surgical history, family health considerations, and personal health considerations in the FollowMyHealth FollowMyHealth Personal Health Record.

The **Conditions** tab on **My Health** lists conditions by type, including **Surgical History**, **Active**, **Denied**, **Personal Health Conditions**, **Family Health Conditions**, and **Past Medical History**.

Each condition type is organized in a section. When you add a condition, you designate a type, such as **Surgical History**, and the condition is added to the section. The sections can be expanded and collapsed. The number of conditions in the section are displayed in parentheses next to the section title.

Conditions are sorted in reverse chronological order by resolved date.

Procedures are sorted in reverse chronological order by procedure date.

To view education information about a condition (if available), click in the **Education** column. Specific education information for that condition is displayed.

A green check mark in the **New** column identifies the condition as new.

Edit an active condition

Active conditions are health conditions that are ongoing problems. Your provider adds active conditions during your visit, and you can edit the conditions.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Conditions** tab.
4. Expand **Active**.
5. Find the condition to edit.
6. Click .

   View Health Condition opens.

7. Edit the condition.

   If a provider entered a resolved condition, select **Resolved** for **Status**. You must enter a date when the issue was resolved.

   If a provider entered a condition that is not applicable, select **Denied**. Items that are resolved are displayed in the **Past Medical History** section.

8. Click **Close**.

Results of this task
You edited an active health condition.

Add an active condition

Active conditions are health conditions that are ongoing problems. Your provider adds active conditions when you have a visit, or you can add your own.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.

3. Click the **Conditions** tab.

4. Click **Add Condition**.

5. For **Type**, select **Health Condition**.

6. For **Name**, type the name of the condition

    When you enter the name, a list of conditions is displayed. Select one of the conditions.

7. For **Status**, select **Active**.

8. For **Comments**, enter related comments.

9. Click **Save**.

    Confirm Add opens.

10. Click **Yes**.

    The condition is listed under **Active**.

Results of this task

You added an active condition to your health record.

Add a surgical history condition

Surgical history conditions are health conditions that are related to surgical procedures.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **My Health** tab.

3. Click the **Conditions** tab.

4. Click **Add Condition**.

    Add Health Condition opens.

5. From **Type**, select **Surgical History**.

6. Enter the name of the condition in **Name**.

    When you enter the name, a list of conditions is displayed. Select one of the conditions.

7. From**Status**, select a status from the list

    Resolved

    This is a past surgery.

    Denied

    You did not have this surgery.

8. For **Procedure Date**, enter the date of the surgery.

9. For **Provider**, enter the name of the provider that performed the surgery.

10. For **Comments**, enter related comments.

11. Click **Save**.

    Confirm Add opens.

12. Click **Yes**.

    You added a surgical history condition to your health record.

Add a family health condition

Family health conditions are your family members' health issues for which you are at risk. Generally, healthcare providers are only interested in family health conditions for blood relatives.

If you add a family health condition to your family health history, and you have authorized individual access to other patients who are family members, you can update the family members' health history at the same time.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **My Health** tab.

3. Click the **Conditions** tab.

4. Click **Add Condition**.

    Add Health Condition opens.

5. From **Type**, select **Family Health Condition**.

6. In **Name**, enter the name of the condition.

    When you enter the name, a list of conditions is displayed. Select one of the conditions.

7. Select a status from **Status**.

    Active

      A condition that is currently a problem for a family member.

    Resolved

      A condition that a family member had, but no longer has.

    Denied

      A condition that you prefer not to include in your family history.

8. Enter the relationship of the family member in **Relationship**.

9. Enter related comments in **Comments**.

10. Click **Save**.

If you are an authorized individual, **Family Health Condition** opens. The patients for whom you are an authorized individual are listed. Select the family members to which that the health condition applies .

11. For **Comments**, enter related comments.
12. Click **Save**.
13. Click **Yes**.

You added a family health condition to your health record.

The condition is listed under **Family Health Conditions** for you and the family members for whom you are an authorized individual.

Add a personal health condition

Personal health conditions include smoking status, exercise habits, drug use, and living habits.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Conditions** tab.
4. Click **Add Condition**.

Add Health Condition opens.

5. For **Type**, select **Personal Health Condition**.
6. For **Name**, type the name of the condition.

When you enter the name, a list of conditions is displayed. You can select one of these conditions or enter your own.

7. For **Status**, select **Active**.

Active

An issue that is currently active.

Resolved

An issue that is no longer active.

Denied

An issue that must not be included in your personal health condition history.

8. For **Comments**, enter related comments.
9. Click **Save**.
10. Click **Yes**.

The condition is listed in **Conditions**.

Results of this task

You added a personal health condition to your health record.

Medications

The FollowMyHealth Personal Health Record lists all active, completed, discontinued, declined, and temporary deferral medications.

Add, delete, and edit medications, request a renewal, and add a preferred pharmacy from the **Medications** tab on **My Health**.

Each medication is displayed in a section. Medications are categorized by status, including Active, Unknown, TemporaryDeferral, Declined, and Complete. You can expand and collapse the sections. The number of medications in each section is indicated in parentheses next to the section title.

Medications are sorted alphabetically by medication name and then by date (newest to oldest).

To view education information about a medication, click in the **Education** column. Specific education information is available.

A green check mark in the **New** column identifies the medication as new.

Add or edit a medication

You can manage your medications under My Health on the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Medications** tab.
4. Click **Add Medication**.
5. For **Name**, enter the name of the medication.

   When you enter the name, a list of medications is displayed. You can select one of these medications or enter your own.
6. For **Directions**, enter the directions that are provided by the provider (how you take your medication).
7. From **Status**, select the status that applies to the medication.

Active

Specifies a medication that you are currently taking.

Complete

Specifies a medication that you have finished, such as an antibiotic.

Discontinued

Specifies a medication that your provider has asked you to stop taking or that is discontinued.

Unknown

Specifies a medication that is not applicable to the other categories.

Declined

Specifies a medication that the provider added and that you declined to take.

On Hold

Specifies an added medication that is on hold until your provider confirms the medication. This medication is added under **TemporaryDeferral**.

EnteredInError

Specifies a medication that was entered in to your health record in error.

8. For **Provider**, enter the provider who prescribed the medication.
9. For **Comments**, enter related comments.
10. Click **Save**.
11. Click **Yes**.

    The medication is listed in **Medications**.

Results of this task
You added or edited a medication in your health record.

Add a preferred pharmacy

You can add a preferred pharmacy to your health information in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Medications** tab.

4. Click **Edit**.

    Pharmacy Search opens.

5. For **Search**, enter the ZIP Code of, or near, the pharmacy.

    By default, your ZIP Code is displayed when **Pharmacy Search** opens. You can change the value.

6. For **Distance in Miles**, select the proximity in miles in which to search.

    The search is based on area pharmacies within the defined proximity of your ZIP Code. To expand or narrow your search, select an increment between 5 and 100 miles.

7. Select a pharmacy and click **Connect**.

8. Click **OK**.

    Send to Organization opens.

9. Select the organizations to which to send the change, and then click **Send**.

    A message confirms that the pharmacy change is submitted to your organizations.

Results of this task

The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy** on the **Medications** tab. The preferred pharmacy is also listed on the FollowMyHealth Personal Health Record **Home** tab under **Health Summary**, and on the **Demographics** tab under **My Account > My Info**.

Request a medication renewal

If you use the online request, you do not need to call the office to request the renewal.

You can request a prescription refill from a provider if the provider meets the following criteria:

*   The provider allows prescription renewals.
*   The provider was the last provider to order the medication.

The following features apply to providers that receive prescription refills:

*   All ordering providers of the medication receive the refill request. If multiple providers prescribed the medication multiple times, all the providers receive the request if they allow prescription renewals.
*   All authorizing providers of the medication receive the refill request. If the medication is refilled, but the authorizing provider changed, the authorizing providers receive the request if they allow prescription renewals.
*   If the ordering or authorizing provider is not one of your providers, they are not included in the refill request unless the provider allows prescription renewal requests.

Notify the pharmacy if you need a prescription refill. Online renewal requests must be used only when you are out of refills.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Medications** tab.
4. Find the medication to renew, and then click .

   Renew a Prescription opens.
5. For **Provider**, select the provider who last prescribed the medication.

   You can request a renewal only from a provider who has prescribed this medicine for you in the past. The provider who last wrote the prescription for you is the default provider in **Provider**. **Prescription** and **Medication Info** are also filled by default and cannot be changed.
6. To change the pharmacy where the renewal fills, click **Edit** in **Preferred Pharmacy**.

   Your preferred pharmacy is listed in **Preferred Pharmacy** as the default pharmacy. If you do not already have a preferred pharmacy or your preferred pharmacy is no longer active, you must select another before submitting the renewal request.

   > **Attention:** If you change the pharmacy when you renew the prescription, the alternate pharmacy is applied only to this specific renewal request. Use this option if you use a separate pharmacy for some medications, such as a mail order pharmacy for ongoing prescriptions.

7. For **Comments**, enter any comments to your provider about the request.
8. Click **Send**.
9. Click **OK**.

Results of this task

You requested a medication renewal. Your provider receives an electronic request to refill the prescription.

Allergies

Add, delete, and edit allergies from the **Allergies** tab on **My Health**.

Allergies are categorized by status, including Active, Inactive, Unknown, Denied, and Resolved. You can expand and collapse the allergy sections. The number of allergies in each section is displayed in parentheses next to the section title.

Allergies are sorted in reverse chronological by onset date.

Add or edit an allergy

You can manage your allergy information in My Health in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Allergies** tab.
4. Click **Add Allergy**.
5. For **Allergy Type**, select an allergy type.

   Medication
   Specifies that you have an allergy to a medication.

   Environmental
   Specifies that you have an allergy to items in your environment, such as pets, trees, or dust.

   Food
   Specifies that you have an allergy to certain food types.

   Unknown
   Specifies that you do not know what type of allergy you have.

6. For **Name**, enter the name of the allergy.

   As you enter the name, a list of allergies is displayed. Select one of these allergies from the list.

7. For **Status**, select the status that applies to the allergy.

   Active
   Specifies an active allergy.

   Inactive
   Specifies an allergy that you might still have, but it is not currently an issue for you.

   Resolved
   Specifies an allergy that you no longer have.

Denied

Specifies that you know you do not have a known allergy. Be sure to add non-allergies to your health record so that providers know that they can prescribe specific medications or use latex.

8. (Optional) For **Onset**, enter the date on which you first became aware of the allergy.

9. For **Allergic Reaction**, enter the type of reaction you experience when exposed to the item, such as rash or nausea, and then click .

The reaction is listed in **Allergic Reactions**.

10. For **Comments**, enter related comments.

11. Click **Save**.

12. Click **Yes**.

Notify Organization of Added Item opens.

13. Click **Yes** or **No**.

If you click **Yes**, a message confirms that a notification is sent.

14. Click **OK**.

Results of this task

You added or edited an allergy in your health record.

Immunizations

You can view your immunization history, add, edit, and delete immunizations from **Immunizations** tab on **My Health**. You can also access vaccine information sheets and immunization schedules that are published by the Centers for Disease Control and Prevention (CDC).

Immunizations are categorized by status, including Received, Declined, On Hold, and Unknown. Click **Filter** to select one or more immunization status types. Only immunizations with those selected status types are displayed.

Only statuses for which you have at least one immunization are available to select. For example, if you do not have immunizations of Unknown status, the **Unknown** status setting is not available to select.

Immunizations are grouped by their series. Only the immunization series for which you have received at least one immunization is displayed. Immunization records within a series are listed in a descending order by administered date. For example, the latest immunization is listed first. If you have more than three immunization records that are applicable to the Influenza (Flu) series,

or you are a patient between ages 19 and 64 and have more than three immunization records that are applicable to the Pneumococcal series, the immunizations in the series are collapsed and the last three immunizations are displayed.

Immunizations for all other series are always expanded with no option to collapse. Click **View More** to display more immunizations or **View Less** to display less immunizations.

Received immunizations is the default view if you have at least one immunization of Received status in your history. If you have not have received immunizations, but have immunizations of other statuses, all immunization status types are displayed as the default view.

Add an immunization

Add an immunization to your personal health record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Immunizations** tab.
4. Click **Add Immunization**.
5. For **Immunization**, enter the name of the immunization.

   Search for an immunization by full name, brand name, or abbreviation. The search results include exact and similar matches, which helps you find the immunization even if you do not know the correct spelling. Search results are listed in order by relevance. The most relevant matches are displayed at the top of the list.

6. For **Date**, enter the date that you received the immunization.

   Today's calendar date is highlighted in the calendar tool.

7. For **Status**, select the status that applies to the medication.

   Received

   Specifies an immunization that you have received.

   OnHold

   Specifies an immunization that you must receive, but cannot receive at this time.

   Declined

   Specifies an immunization that you were offered, but that you declined.

8. For **Provider**, enter the name of the provider who administered the immunization.
9. For **Comments**, enter related comments, up to 4000 characters.
10. Click **Save**.

11. Click **Yes**.

    Notify Organization of Added Item opens.

12. Click **Yes** or **No**.

    If you click **Yes**, a message confirms that a notification is sent.

13. Click **OK**.

Results of this task

You added an immunization in your health record.

View immunization details

You can view details about your immunizations on the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Immunizations** tab.
4. Click an immunization to view.

    If you entered the information, the **Edit Immunization** page opens, and you can edit the immunization details. If the immunization was entered by your provider, the **View Immunization** page opens and is read-only.

5. Do either of the following steps:

    • Edit the immunization details and click **Save**.
    • View the immunization details and exit the page and click **Close**.

Results of this task

You viewed details about your immunizations.

View CDC immunization schedules

View the most current Centers for Disease Control and Prevention (CDC) immunization schedules from the FollowMyHealth Personal Health Record to verify that you are compliant with the plan for required pending immunizations.

You can view the following immunization schedule types:

• Easy-to-Read Schedule for Children, Birth through 6 Years

- Easy-to-Read Schedule for Preteens and Teens, 7-18 Years
- Easy-to-Read Schedule for Adults, by Age

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Immunizations** tab.
4. Click **View Schedule**, to view a default immunization schedule that is based on your date of birth.

   The application uses the date of birth listed in **Demographics**.
5. To select a specific age group immunization schedule, click the arrow next to **View Schedule**.

   The immunization schedule types are displayed.
6. Select an immunization schedule type from the menu.

What to do next

Download or print a .pdf file of the immunization schedule.

View vaccine information sheets

Vaccine information sheets are documents that provide education about an immunization.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Immunizations** tab.
4. Point to the immunization to view it.
5. Click InfoButton™ ( ).

   Vaccination Information opens.
6. Click the link listed under **Vaccine Information Sheets**.

   The vaccine information sheet is displayed in a .pdf file.

What to do next

Save or print the vaccination sheet.

Share your immunization record

Use **Send** on the **Immunizations** tab to email, print, or fax your immunization record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Immunizations** tab.
4. Click **Send**.
5. Take one of the following actions:

    -   Select **Email** to send your immunization record by email message. Enter the email address to which to send your record, and then click **Send**. Click **OK**.
    -   Select **Print** to print your immunization on your local printer. **Print** opens. Click **Print**.
    -   Select **Fax** to fax your immunization record. **Fax Immunizations** opens. Enter the recipient in the **To** box, the fax number in the **Fax Number** box, and then click **Send**. Click **OK**.

        > **Note:** The health data that you email, print, or fax from the **My Health** tabs is not encrypted. You can export data from **My Health > Summary > Export** and send your healthcare data through an encrypted email message.

Results of this task
You emailed, printed, or faxed your immunization record.

Results

The FollowMyHealth Personal Health Record provides lab results, radiology results, or any other results if the ordering provider has enabled the results for viewing online.

From the **Results** tab on **My Health** you can:

-   Add, delete, and edit (patient entered) results, and print results or save as a PDF.
-   Generate charts to display historical results, and print or save the chart as a PDF. You can also add a selected chart to your **My Charts** widget in the **App Center** on the Home tab.
-   Send results by email or fax.

Results are listed in the Results table in separate sections. You can expand and collapse the sections as needed. The number of results in each section is displayed in parentheses next to the section title.

There are three dates that are associated with each individual result:

- **Ordered On** date: The date that the test is ordered.
- **Collected On** date: The date that the specimen for the test is collected.
- **Resulted On** date: The date that the results of the test are available.

> **Note:** Result details depend on what is available in the source system; some results might not include all three dates.

These three dates are displayed clearly in the header and title of each section in the Results table:

The **Resulted On** column shows the resulted date for each result. The **Ordered On** and **Collected On** labels and values are included in the section title. If a date is not available the label is not displayed.

Results are loaded incrementally and sorted in reverse chronological order by ordered date, and then by resulted date. The most recent 50 orders are displayed on the **Results** tab. You can display the next 50 orders automatically by scrolling to the bottom of the page.

To view education information about a result, click in the **Education** column.

A green check mark in the **New** column identifies a new result.

Non-numeric results, such as radiology and microbiology, are displayed with an indicator to identify the result as `Normal` or `Abnormal`. If the result value is unknown, the indicator is not displayed.

View result details

You can view results in two ways, depending on the type of results.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.

    The **Results** table is displayed, with results displayed in collapsible sections, expanded by default. You can collapse individual sections, or collapse all sections by clicking **Collapse All**. This button changes to **Expand All** which when clicked expands all sections.

4. Review the numerical results in the **Range** column.

    The results represent where the values occur within a range (low, normal, and high). Range information is available only if the provider sent this information with your results.

The **Range** column is empty for text-based results that are non-numeric, such as pathology and radiology.

Most numeric results from your provider are associated with a reference range of normal values. View the range by pointing to the graphic in the **Range** column or by printing the result.

> **Important:** High and low reference range values can vary slightly between lab facilities. The reference ranges in your health record are from your provider. Your provider enters results that are transmitted to your health record. The results range is an accurate representation

of low and high standards that are used by your healthcare organization.

5. To view text-based results, click .

The **Collected On**, **Ordered On**, and **Resulted On** dates are displayed with applicable labels.

Tooltip information for each date field is available.

Where applicable, the **Normal Range** field is displayed, similar to the mobile app. This field is not displayed when editing patient-entered results.

The **Provider** field is displayed on the right.

When editing patient-entered results, the **Collected On** field is required, and the **Name** field must contain a valid selection from the dropdown list. The **Ordered On** and **Resulted On** date fields are optional.

What to do next

Print your results.

> **Note:** You can print details only if the result is sent to the FollowMyHealth Personal Health Record from the organization. You cannot print patient-entered results from the details page. The health data that you print is not encrypted. To send secure health data, click **My Health > Summary > Export**. The exported health data is sent through an encrypted email message.

Add results

You can add result information to your health data in the FollowMyHealth Personal Health Record. The source of this entry is labeled "Patient-Entered".

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.
4. Click **Add Result**.

The **Add Result** screen is displayed.

5. For **Name**, begin typing the name of the result.

As you begin typing, a dropdown list of acceptable test result names is displayed. Select one of these results.

6. For **Value**, enter the actual numerical result value from the test.

   You can also click in the field to select a recently entered value.

7. For **Units**, click in the field to select a suitable unit of measure or enter the unit of measure from the test result.

   For example, enter `mmHG` for blood pressure.

8. For **Collected On**, enter the date that the specimen for the test was collected, using "MM/DD/YYYY" format.

   You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

9. For **Ordered On**, enter the date that the test was ordered, using "MM/DD/YYYY" format.

   You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

10. For **Resulted On**, enter the date on which you learned the results, using "MM/DD/YYYY" format.

    You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

11. For **Provider**, enter the name of the provider who ordered the test.

    You can also click in the field and select a recently entered provider from the dropdown list.

12. For **Comments**, enter any related comments.
13. Click **Save**.

    The **Confirm Add** prompt is displayed.

14. Click **Yes** to confirm your add request.

    The result is added to the **Results** table with a green check mark in the **New** column.

Edit result details

You can edit patient-entered result information in your health data in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.

4. Select a result to edit and click .

   The **Edit Result** screen is displayed.

5. To change **Name**, clear the entry and begin typing the new name of the result.

   As you begin typing, a dropdown list of acceptable test result names is displayed. Select one of these results.

6. For **Value**, clear the entry and enter the updated numerical result value from the test.

   You can also click in the field to select a recently entered value.

7. For **Units**, clear the entry and click in the field to select a suitable unit of measure or enter the unit of measure from the test result.

   For example, enter `mmHG` for blood pressure.

8. For **Collected On**, edit the date that the specimen for the test was collected, using "MM/DD/YYYY" format.

   You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

9. For **Ordered On**, edit the date that the test was ordered, using "MM/DD/YYYY" format.

   You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

10. For **Resulted On**, edit the date on which you learned the results, using "MM/DD/YYYY" format.

    You can also click the calendar widget and select the date from there, or you can click in the field and select a recently entered date from the dropdown list.

11. For **Provider**, edit the name of the provider who ordered the test.

    You can also click in the field and select a recently entered provider from the dropdown list.

12. For **Comments**, enter or edit any related comments.

13. Click **Save**.

    The edited result is displayed in the **Results** table.

Delete results

You can delete result information from your health data in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **My Health** tab.

3. Click the **Results** tab.

4. Select a result to delete and click .

   The **Confirm Delete** prompt is displayed.

5. Click **Yes** to confirm your delete request.

    The result is removed from the **Results** table.

Print results

You can print all result information or the details for a select result in your health data in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.
4. To print the entire Results table, click **Send > Print**.

    To print the details for a selected result, click [icon] to display the details of the selected result and then click **Print**.

    A message is displayed reminding you that you are printing unencrypted information from your health record to an external device, with optional information on how to export information in encrypted form.

5. Click **Print** to confirm your print request.
6. You can then direct the print out to a printer or save as a PDF.

Email or Fax results

You can send all result information by email or fax in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.
4. To send the Results table in an email, click **Send > Email**.

    To send the Results table by fax, click **Send > Fax**.

    A message is displayed reminding you that you are emailing or faxing unencrypted information from your health record to a third party, with optional information on how to export information in encrypted form.

5. If sending by email, enter the email address of the intended recipient and click **Send**.

    A message is displayed indicating that the email has been sent.

6. If sending by fax, enter the name of the intended recipient and the **Fax Number** to use and click **Send**.

   A message is displayed indicating that the fax has been sent.

7. Click **OK**.

Chart results

You can display results in chart form if you have three or more of the same type of result.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Results** tab.
4. In the Results table, locate the result to chart.

   The 🥗 must be displayed in color to indicate that the result at least 3 data points to be charted.

5. Click 🥗.

   ║ **Note:** Only the first 50 results of that type are graphed.

   My Charts opens, displaying the results in line chart format.
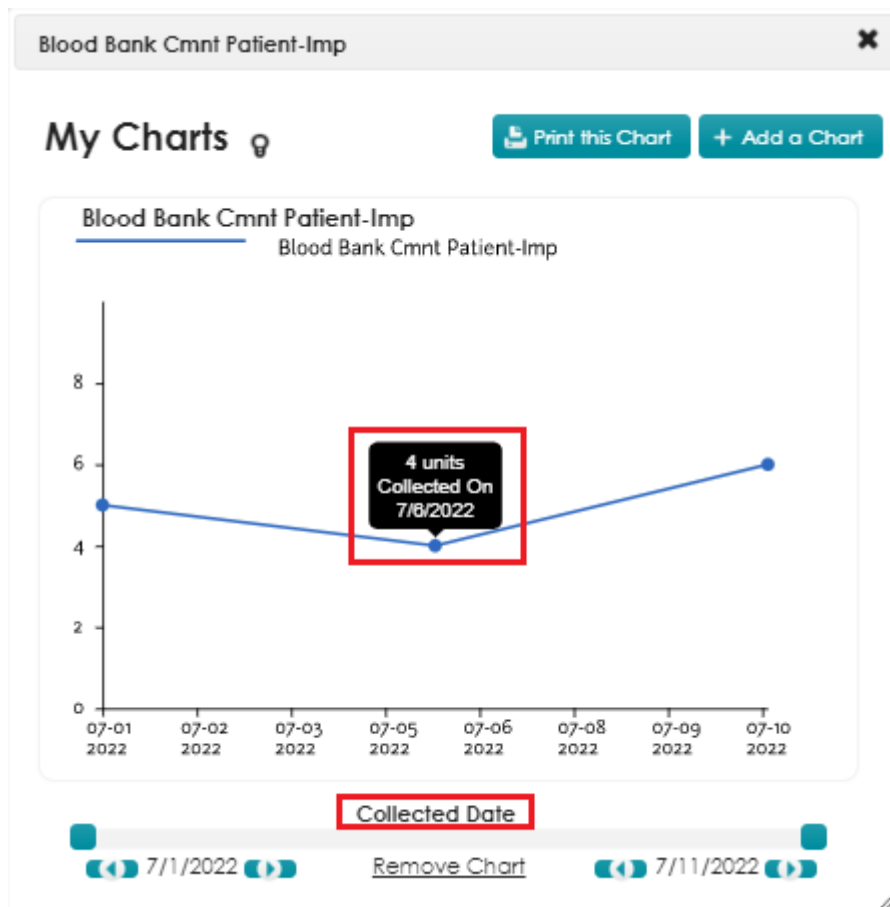
The type of result is displayed above the chart and the x-axis is labeled as "Collected Date".

You can move the cursor over a data point to view the result value and unit of measure, along with the "Collected On" date.
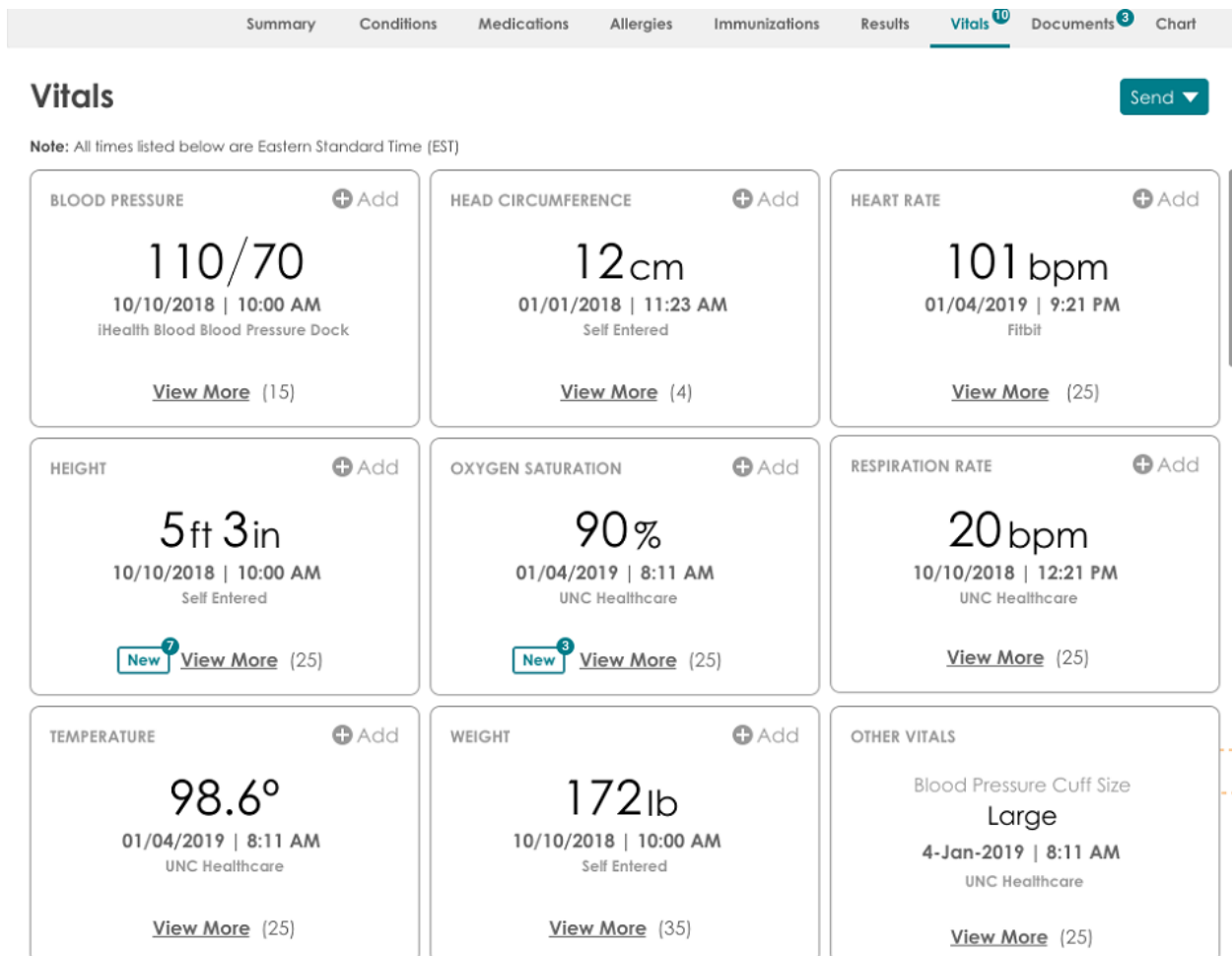
You can adjust the date range of the chart by moving the square markers below the chart or modifying the start and end dates as needed.

6. Click **Print this Chart** to print the chart or save it as a PDF, or click **Add a Chart** to add the chart to your Charts Widget (the **My Charts** application in the **App Center** on the **Home** tab.)

Vitals

Vitals from the electronic health record (EHR) application are listed in FollowMyHealth under **My Health** if the organization has enabled vitals data for viewing online. You can also enter your own vitals and view them in **My Health**.

Figure 3: Vitals card view

Vitals information is displayed in **My Health > Vitals** on the FollowMyHealth® Personal Health Record as a set of card views (one card for each of the following types of vitals measurement):

- Blood pressure
- Body Mass Index (BMI)
- Body surface area
- Head circumference

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- Heart Rate
- Height
- Oxygen saturation
- Respiration rate
- Temperature
- Visual acuity
- Weight
- Other Vitals

Each card shows the latest vital reading for that category, the date and time the vital is recorded, and the source of the measurement (either patient entered, the organization name, or a supported device name, such as Fitbit, Withings, iHealth, and Garmin).

Click **View More** in each card to view additional vitals data for that category. A count of the number of data points in the category is shown, and a **New** indicator shows how many new data items are available for that category.

> **Note:** When no vitals data are available for a specific vitals type, the **View More** link is not displayed in that card view.

Click **Add** in some cards to include additional vitals data for that category. **Add** is not available for the following:

- **Other Vitals**
- **Body Mass Index**
- **Body surface area**
- **Visual acuity**

The time zone in which dates are displayed is listed at the top of the **Vitals** page and is based on the local user's browser settings.

Other Vitals card view of generic vitals data

The **Other Vitals** card groups all generic vitals (custom vitals from the electronic medical record (EMR) application) along with other vitals that users cannot add themselves, such as growth percentiles, pain scale ratings, and so on. Mood vitals are not displayed in **My Health > Vitals**.

Generic vitals are identified and grouped based on the name field, which is free text that is set by each organization. The details view of the **Other Vitals** card shows a list of generic vitals that are sorted be date (newest first). All generic vitals are sorted by date.

The card displays the following information:

- The name of the latest vital in this category
- The date and time the vital was recorded
- The source (organization name).
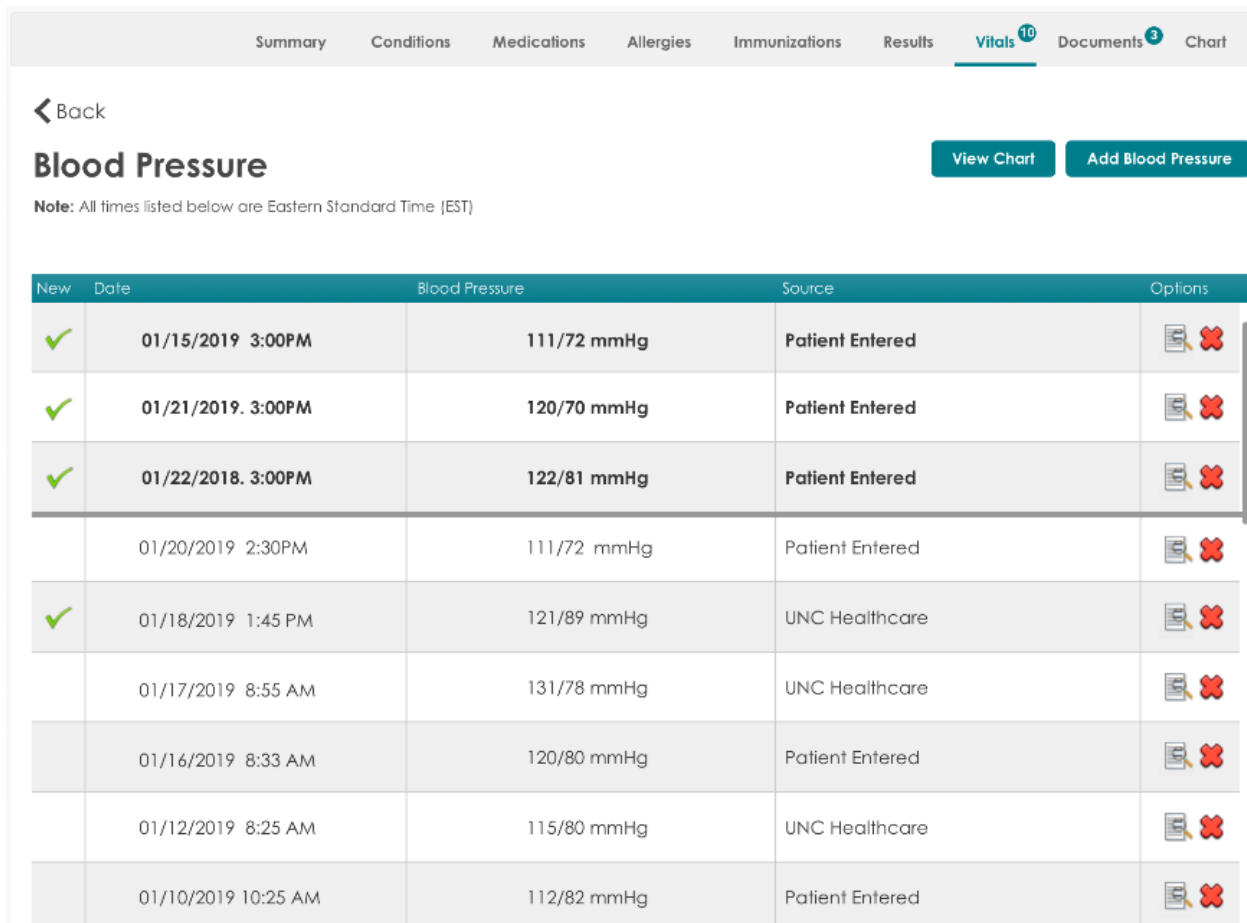
The **Other Vitals** card is always shown last on the **Vitals** card view and does not include an **Add** link. Vitals in this category cannot be graphed.

View more vitals details

Click **View More** in each card on the **Vitals** tab to display a detailed table view of vitals data in that category.

Figure 4: View More displays additional vitals data for that category.

Vitals details are displayed in a table view with the following features:

- The vital type (for example, Blood Pressure) is displayed in the table title.
- The 50 most recent vitals for the category are displayed, with the most recent data at the top. Newly entered data is displayed in a bold font for easy identification, with a green checkmark in the **New** column.

- The **Date** column shows the time that the measurement was taken in your local time zone, based on your browser settings. The time zone is displayed at the top of the page.
- The value of each measurement and an indication of the source of the measurement is shown (either the organization name, **Patient Entered** if entered manually by the patient, or a supported device name, such as Fitbit, Withings, iHealth, or Garmin).
- **Edit** and **Delete** options are available for each vital. Deleted vitals are moved to the **Restore Deleted Items** section under **My Account > Preferences**, and you can restore them later if needed.
- Click **View Chart** to view the data in chart form, if at least three vitals of that type are available.
- Click **Add** *[Vital type]* to include additional vitals data to that vital type.
- To return to the card view, click **Back** or the **Vitals** tab.

Add vitals

You can add vitals information to your health information in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Health > Vitals**.
3. If the category supports adding vitals, click **Add**.

   Alternatively, you can click **View More** and click **Add** *[Vital type]* from the details view.

   > **Note:** You cannot add vitals for **Other Vitals**, **Body Mass Index**, **Body surface area**, or **Visual Acuity**.

4. For **Date Taken**, enter the date on which the vital sign was taken.

   The current date is shown by default. Change it if needed.

5. For **Time**, enter the time at which the vital sign was taken.

   The current time is shown by default. Change it if needed.

6. Depending on the type of vital, enter the measurement using the units as configured in your FollowMyHealth account preferences.

   Error-checking is performed on your entry to verify that the correct format and units are used. The following are the range of valid values for entering vitals information:

   - Head Circumference (1 to 100cm)
   - Heart Rate (1 to 350 bpm)
   - Respiration Rate (1 to 150)
   - Temperature (10 to 120 F, of 10 to 49 C)
   - Weight (0.1 to 2000 lb, or 0.1 to 908 kg)

An error message is displayed if the entered value is outside of the acceptable range.

7. (Optional) For **Comments**, enter any related comments.
8. Click **Save**.

   To cancel the addition of vitals, click **X**.

   You are asked to confirm the addition of vitals data to your account.

9. Click **Yes**.

   If you click **No** the addition of vitals data is canceled.

   The new vital data is added to your vitals data for that category, and you return to the card view. Your latest vital is displayed in the card with the date and time.

Edit vitals

You can edit vitals information in your health information in the FollowMyHealth Personal Health Record.

If the source of the vital is **Patient Entered**, you can edit any of the vitals information. If the source is an organization name, you can only view (but not edit) vitals information from the organization.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Health > Vitals**.
3. On any card, click **View More**.
4. On the detailed view of the selected card, select a vital measurement with a source of **Patient Entered** and in the **Options** column of the table, click the **Edit** icon.
5. Modify the details of the vital.
6. Click **Save**.

   To cancel the edit, click **X**.

7. Click **Back** or click the **Vitals** tab to return to the card view.

Delete vitals

You can delete vitals information in your health information in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Health > Vitals**.
3. On any card, click **View More**.

4. On the detailed view of the selected card, select a vital measurement and in the **Options** column of the table, click the **Delete** icon.

   You are asked to confirm the delete request.

5. Click **Yes**.

   If you click **No** the deletion of vitals data is canceled.

6. Click **Back** or click the **Vitals** tab to return to the card view.

Chart vitals

You can view a chart of vitals information in the FollowMyHealth Personal Health Record.

The vitals data that you chart must include at least three data points to enable the **View Chart** option in the details view.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **My Health > Vitals**.
3. On any card (except **Other Vitals**), click **View More**.
4. On the detailed view of the selected card, click **View Chart**.

   > **Note:** **View Chart** is not available if less than three data points are available in the table.

A chart displays up to 50 data points.

Figure 5: Example chart of vitals data
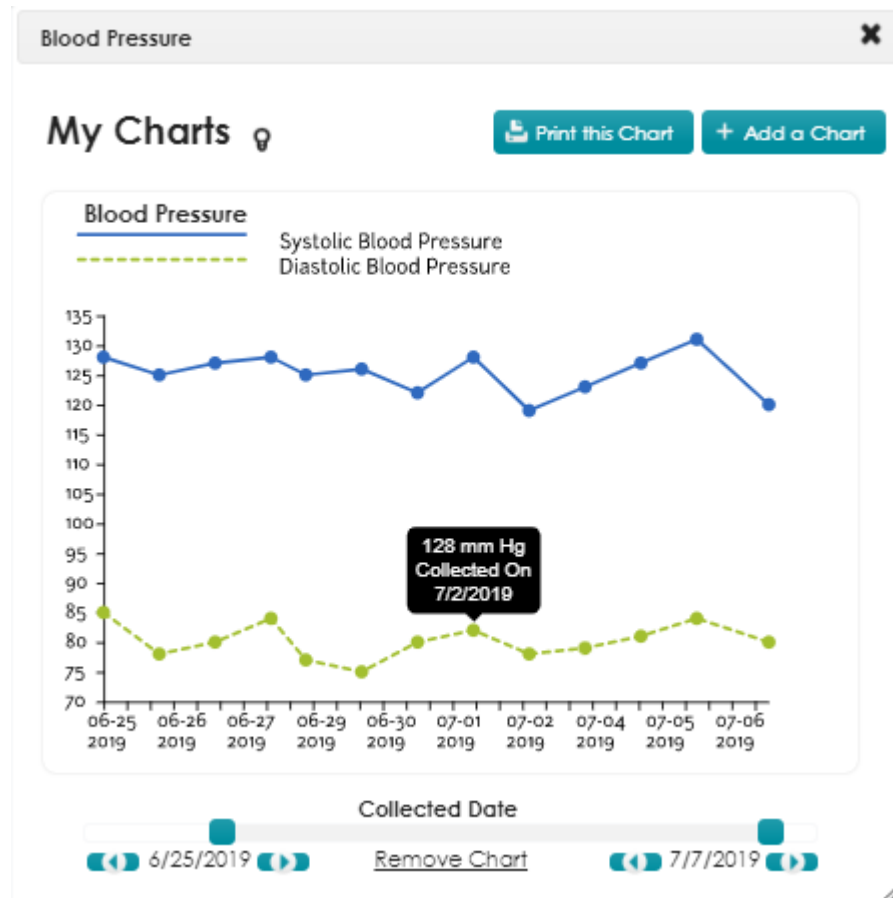
The type of vital is displayed above the chart and the x-axis is labeled as "Collected Date".

You can move the cursor over a data point to view the vital value and unit of measure, along with the "Collected On" date.

5. (Optional) In this chart view, you can do several tasks:

    • Click **Print This Chart** to print the chart.
    • Click **Add a Chart** to add the chart to your Charts Widget (the **My Charts** application in the **App Center** on the **Home** tab.)
    • Use the date controls under the chart to change the range of data points that are displayed in the chart.
    • Click **Remove Chart** to remove the chart from your chart collection.

6. Click **X** to close the chart view.
7. Click **Back** or click the **Vitals** tab to return to the card view.

Documents

FollowMyHealth lists documents such as release forms you have signed, office visit documents, notes, and other documents that are related to your health record.

> **Note:** Scanned documents are displayed in black and white only.

From the **Documents** tab in **My Health**, you can add your own documents and view documents that were added by your provider.

When new documents are posted to your account, the number of new documents is displayed on the **Documents** tab in **My Health**. When you select the **Documents** tab, the new items are indicated with a check mark.

When you complete and send back an electronic form that you received from your provider, the form is added to the **Documents** tab, and the date and time of submission is included in the form, shown in the time zone of the organization. If you are connected to a virtual organization, you receive a request for access form for the virtual organization to which you are connected.

> **Important:** Forms cannot be changed after they are emailed to providers. If you send a form to a provider, a page opens with the message to confirm that you want to send the form.

> **Note:** The health data that you print is not encrypted. To transmit secure data, click **My Health > Summary > Export**. The exported health data is sent through an encrypted email message.

Documents are sorted in reverse chronological order by recorded date.

Add a document

You can upload `.jpeg`, `.png`, `.txt`, and `.pdf` document file types.

If you attempt to upload a document type that is not supported, a warning message is displayed.

> **Note:** Printing, emailing, and faxing patient-uploaded `.txt` files is not currently supported.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **My Health** tab.
3. Click the **Documents** tab.
4. Click **Add Document**.

5. For **Document Name**, enter the name of the document.

6. For **Date**, enter the date on which the document was created.

7. For **Provider**, enter the provider who submitted the document.

8. Click **Choose File** to browse your computer for the document.

    a) Select the file and click **Open**.

    The document is listed under **Files to Upload**.

9. Click **Save**.

10. Click **Yes**.

    Notify Organization of Added Item opens.

    > **Note:** If this page does not pop-up, your connected organization does not use this feature.

11. Click **Yes** or **No**.

    If you click **Yes**, you must confirm that a notification is sent.

12. Click **OK** to confirm.

    The document is listed in the **Documents** tab.

13. Click to view your document.

    Document details displays who wrote the document and detailed notes. You can print or fax these detail from this page.

Results of this task

You added a document to your health record and viewed the document.

Chapter 8

Wellness

The **Wellness** tab on the FollowMyHealth® Personal Health Record is home to your wellness goals, measurements, and education.

Click the **Wellness** tab to display additional tabbed sections where you can access all of your wellness information.

Summary

The **Summary** tab provides an overall view of your wellness. You can:

- View or schedule upcoming appointments with your wellness coach
- View the latest information on your goals
- Quickly access the latest news, education and recent success stories on WellnessWire
- Connect to measurement devices and applications that are supported by FollowMyHealth

WellnessWire

The **WellnessWire** tab provides access to a wide range of wellness topics, including:

- Healthy eating
- Managing emotional stress
- Exercise

Check back often for the latest news and educational tips on how to improve and maximize your wellness.

Measurements

You can view and add measurements related to health goals on the **Measurements** tab.

The **Measurements** tab is available even if you do not have health goals set by your provider.

The following measurements are available.

- Blood pressure
- Mood
- Steps
- Weight

For more information, see the related reference on "Measurements".

Goals

If your provider sets health goals for you, such as losing or maintaining weight, the **Goals** tab is displayed on your FollowMyHealth Personal Health Record **Home** tab.

The following goal types are available for your provider to assign.

- Weight management
- Monitor weight
- Monitor blood glucose
- Monitor blood pressure
- Monitor mood
- Monitor steps

For more information, see the related reference on "Goals".

Education

The **Education** tab contains additional educational and informational documents from your provider or organization. These documents might be additional resources about your current health condition or reference material that is recommended by your healthcare organization.

Related concept information

Goals

Care providers can set health goals for you to achieve from home (for example, "Lose 10 pounds in 3 months" or "Maintain a blood pressure under 140/90 for the next 30 days"). These goals are listed on the **Goals** tab so that users can track their goals through the FollowMyHealth Personal Health Record.

The number of unaccepted goals is listed on the **Goals** tab until you accept or decline the new goals.

> **Note:** The **Goals** tab is not displayed in the FollowMyHealth Personal Health Record unless the provider sets a goal for the patient.

You can use wireless blood pressure monitors, blood glucose monitors, and wireless scales to send related goals data to the FollowMyHealth Personal Health Record automatically. These devices make it easy for you to follow your care plan. You can also enter these readings manually if you do not have a wireless device.

Each goal has rules that are specific to your condition. These rules are set when the provider creates your goal. Data that relates to the goal is analyzed against these rules.

Goals are organized by status. The **Goals** tab does not display completed, declined, and canceled goals.

New

> If you receive a new goal, a message is displayed on both the **Goals** tab and the **Summary** tab. You must accept or decline the goal to proceed. Notifications might be sent to the ordering provider if you do not respond to the new goal after a certain time, based on rules set by the provider when the goal is created.

Active

> The goal is considered active when you accept the goal and are actively collecting readings. When you accept the goal, a **Goal Release of Information Authorization** document is created and sent to the **Documents** tab in the user's FollowMyHealth account. Notifications might be sent to the ordering provider if the readings violate rules that are specific to the goal or if readings are not recorded based on the rules set by the provider. Results are also recorded if a notification is triggered.

Completed

> The goal is completed automatically when it is reached or the end date has occurred. Results are sent back to the provider to view the results. Notifications are no longer triggered and readings are no longer captured for completed goals. The **Goal Summary** document is created when the goal is completed and sent to the **Documents** tab.

Declined

> You can decline a goal when it is new or active. The provider receives a notification if the goal is declined. Notifications are no longer triggered and readings are no longer captured, for declined goals. The **Goal Release of Information Authorization** document is created when the goal is declined and sent to the **Documents** tab.

Canceled

> If a goal is canceled by the provider, a secure message is sent to the your inbox. Notifications are no longer triggered and readings are no longer captured for canceled goals.

Goal types

Weight management goal

The weight management goal is used to set a goal for weight gain or loss.

The following list includes best practices when managing your weight management goals.

- Readings are entered manually or with a compatible wireless scale. The compatible device automatically sends the readings to your FollowMyHealth Personal Health Record account.
- Only weight readings from your compatible devices or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading value, date and time, and the source.
- The graphed progress includes the following.

  — The first reading on the goal is used to calculate the target weight based on the weight set in the goal. The goal start and end dates are included in the header.
  — **Last Reading** specifies the last weight reading.
  — **Target Weight** specifies the target weight.

    ♦ The target weight is the orange dotted line.

  — The progress indicator shows your progress towards reaching your goal. It indicates how much your weight has changed since you started your goal.

- The compatible devices are set up in **Devices & Apps** in the FollowMyHealth Personal Health Record.
- You can connect to your wireless scale from a weight management goal in the **Goals** tab.
- Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.
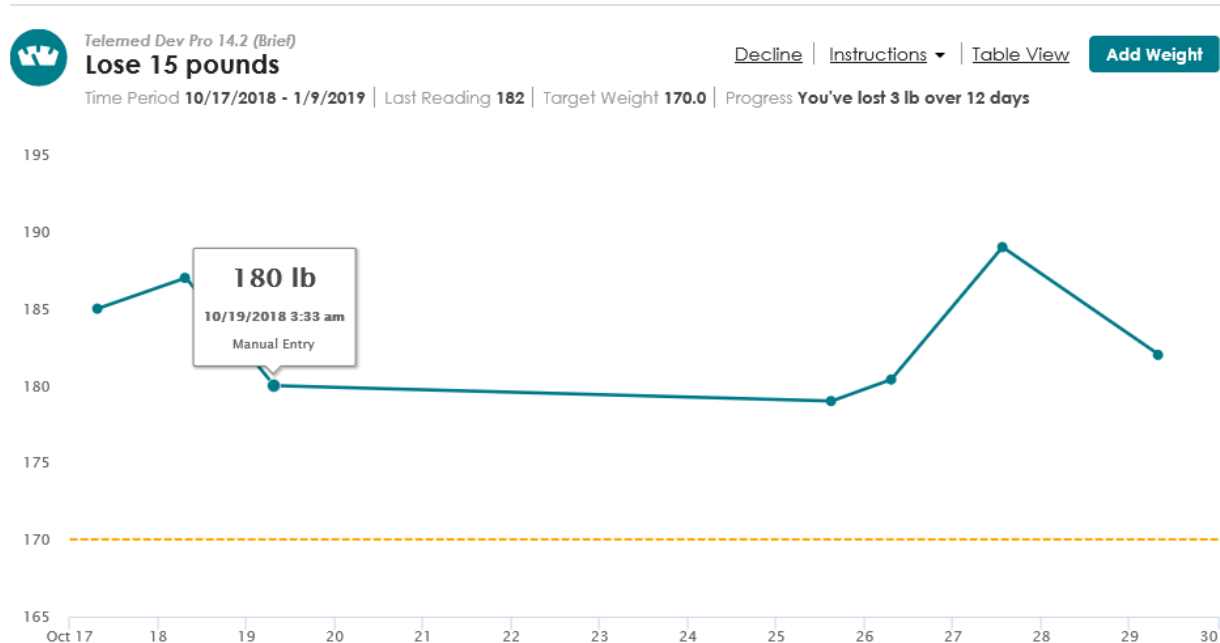
Telemed Dev Pro 14.2 (Brief)
Lose 15 pounds

Decline | Instructions ▾ | Graph View | **Add Weight**

Time Period **10/17/2018 - 1/9/2019** | Last Reading **182** | Target Weight **170.0** | Progress **You've lost 3 lb over 12 days**

Date	Weight (lb)	Source	Comments
10/29/2018 4:00 am	182.0	Manual Entry	
10/27/2018 9:26 am	189.0	Manual Entry	
10/26/2018 3:12 am	180.4	Manual Entry	
10/25/2018 11:03 am	179.0	Manual Entry	testing comments for a...
10/19/2018 3:33 am	180.0	Manual Entry	
10/18/2018 3:33 am	187.0	Manual Entry	
10/17/2018 3:33 am	185.0	Manual Entry	

Monitor weight goal

The monitor weight goal is used to monitor weight changes in patients with congestive heart failure.

The following list includes best practices when managing your monitor weight goals.

- Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the FollowMyHealth Personal Health Record.
- Only weights from your compatible device or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
- The graph data point tooltip includes the reading value, date and time taken, and source.
- The compatible devices are set up through **Devices & Apps** in the FollowMyHealth Personal Health Record.
- You can connect to your compatible device from a monitor weight goal on the **Goals** tab.
- Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.

Telemed Dev Pro 14.2 (Brief)
Take your weight every day
Time Period **10/17/2018 - 11/16/2018**

Decline | Instructions ▾ | Table View | **Add Weight**
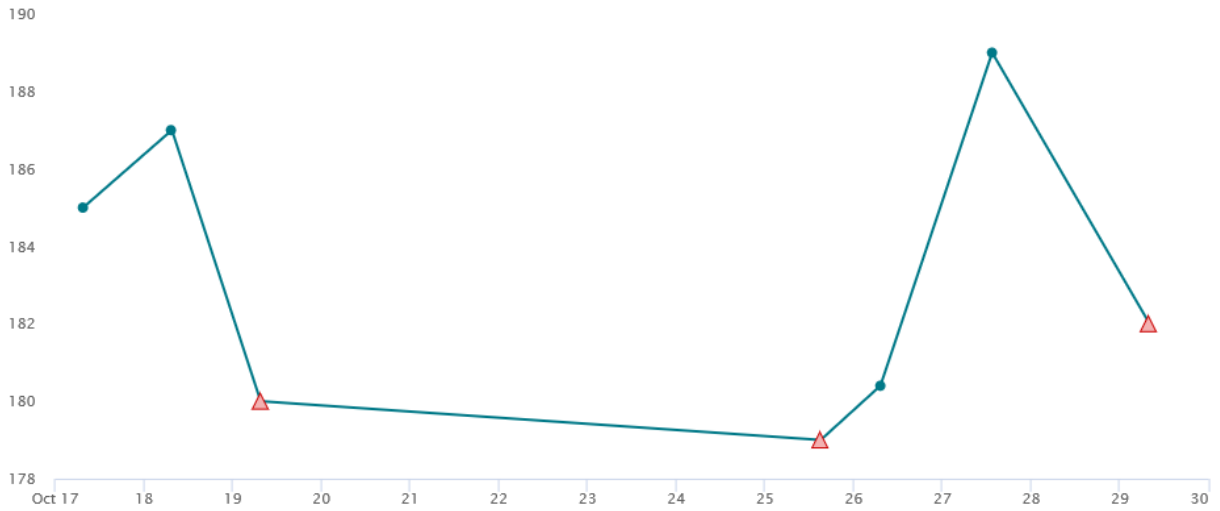
Telemed Dev Pro 14.2 (Brief)
Take your weight every day
Time Period **10/17/2018 - 11/16/2018**

Decline | Instructions ▾ | Graph View | **Add Weight**

Date	Weight (lb)		Source	Comments
10/29/2018 4:00 am	182.0	⚠	Manual Entry	
10/27/2018 9:26 am	189.0		Manual Entry	
10/26/2018 3:12 am	180.4		Manual Entry	
10/25/2018 11:03 am	179.0	⚠	Manual Entry	testing comments for a...
10/19/2018 3:33 am	180.0	⚠	Manual Entry	
10/18/2018 3:33 am	187.0		Manual Entry	
10/17/2018 3:33 am	185.0		Manual Entry	

Monitor blood glucose goal

Use the monitor blood glucose goal to monitor blood glucose levels for patients with diabetes.

The following list includes best practices when managing your monitor blood glucose goals.

- Readings are entered manually from the goal or electronically with a compatible device that sends the reading automatically to the FollowMyHealth® Personal Health Record.
- The graph data point tooltip includes the reading, date, time, tag, and any broken rules.
- The compatible devices are set up through **Devices & Apps** in the FollowMyHealth Personal Health Record.
- You can connect to your compatible devices from a goal in the **Goals** tab.
- If a blood glucose reading is added to the **Results** tab in **My Health** and the reading date is within the goal period, the reading is also added to the **Goals** tab.
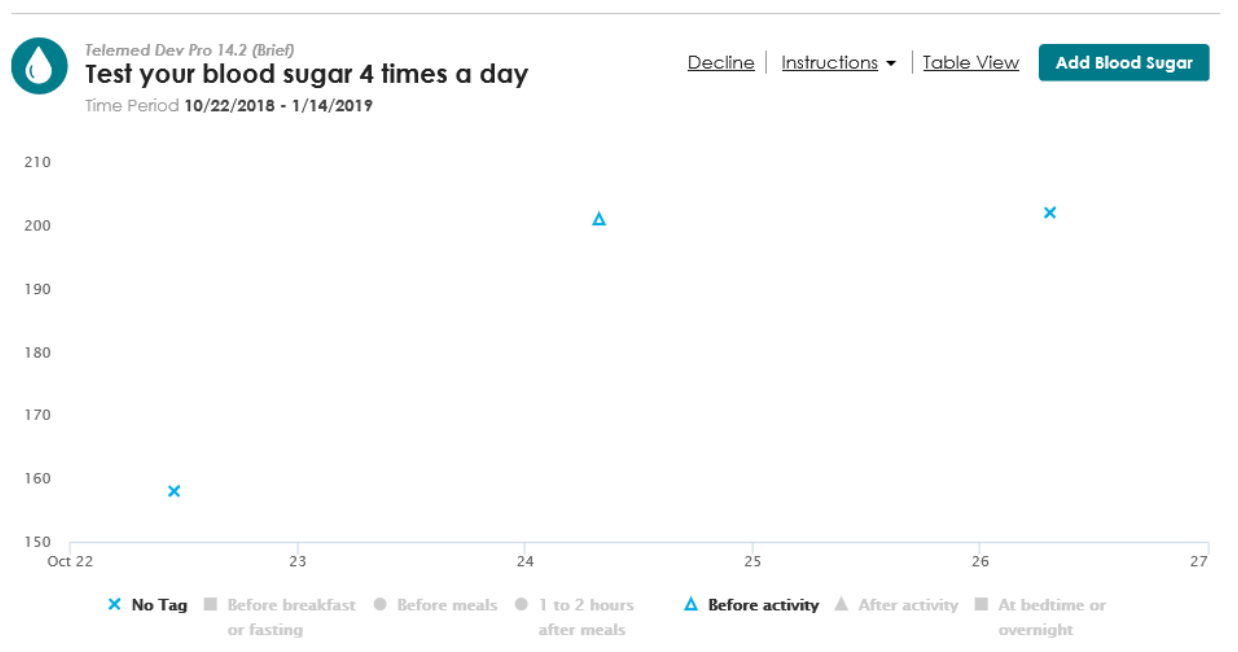
Telemed Dev Pro 14.2 *(Brief)*
Test your blood sugar 4 times a day
Time Period **10/22/2018 - 1/14/2019**

Decline | Instructions ▾ | Graph View | **Add Blood Sugar**

Date	Blood Sugar (mg/dL)	Source	Comments
10/26/2018 3:24 am	202	Manual Entry	
10/24/2018 3:50 am	201	Manual Entry	
10/22/2018 7:00 am	158	Manual Entry	

Monitor blood pressure goal

The monitor blood pressure goal is used to monitor blood pressure levels for patients with hypertension.

The following list includes best practices when managing your monitor blood pressure goals.

- Systolic and diastolic values are connected by a line in the graph view to indicate that the values are from the same reading. The top horizontal line is the systolic goal and the bottom horizontal line is the diastolic goal.
- Readings are entered manually or with a compatible device by either your provider or yourself. The device automatically sends the reading to the FollowMyHealth Personal Health Record.
- The graph data point tooltip includes the value, date, time, and any broken rules.
- The compatible devices are set up through **Devices & Apps** in the FollowMyHealth Personal Health Record.
- You can connect to your compatible devices from a blood pressure goal in the **Goals** tab.
- If you add a blood pressure reading to the **Vitals** tab in **My Health**, the reading is automatically added to the **Goals** tab provided the date of the measurement is within the goal period.
- Apply an overlay of your mood measurements to your blood pressure readings to see how an excited or happy mood affects blood pressure.

Telemed Dev Pro 14.2 (Brief)

Maintain a blood pressure less than 95/125 mmHg every week

Time Period **10/17/2018 - 11/16/2018**

Decline | Instructions ▾ | Table View | **Add Blood Pressure**
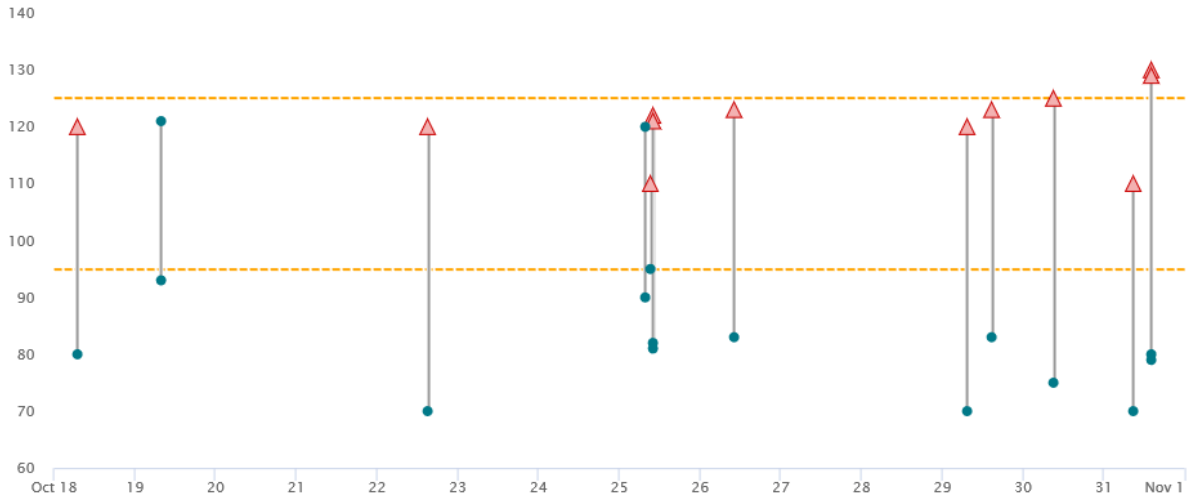
New Insight: See how your mood affects your blood pressure

Telemed Dev Pro 14.2 (Brief)

Maintain a blood pressure less than 95/125 mmHg every week

Time Period **10/17/2018 - 11/16/2018**

Decline | Instructions ▾ | Graph View | **Add Blood Pressure**

Date	Blood Pressure (mmHg)		Source	Comments
10/31/2018 10:13 am	130/80	△	Manual Entry	
10/31/2018 10:12 am	129/79	△	Telemed Dev Pro 14.2 (Brief)	
10/31/2018 4:48 am	110/70	△	Telemed Dev Pro 14.2 (Brief)	
10/30/2018 5:13 am	125/75	△	Manual Entry	
10/29/2018 10:54 am	123/83	△	Manual Entry	
10/29/2018 3:29 am	120/70	△	Manual Entry	

Monitor mood goal

The monitor mood goal is used to monitor mood levels for patients.

The following list includes best practices when managing your mood goals.

- Readings are entered manually in the FollowMyHealth Personal Health Record or from a Goal reminder message or text.
- The data displays in a graph and table format.
- Apply an overlay of your mood measurements to your blood pressure readings to see how an excited or happy mood affects blood pressure.

Telemed Dev Pro 14.2 (Brief)
Track how you're feeling every day
Time Period **10/17/2018 - 12/26/2018**

Decline | Instructions ▾ | Table View | **Add Mood**
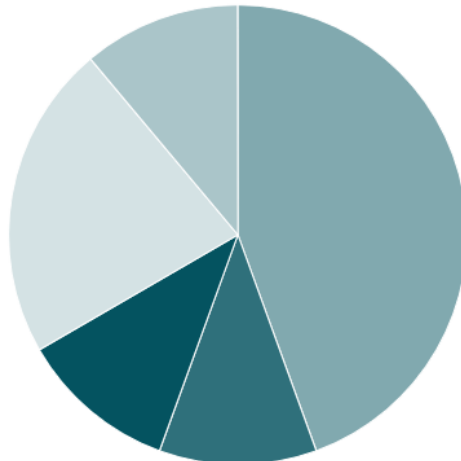
Telemed Dev Pro 14.2 (Brief)
Track how you're feeling every day
Time Period **10/17/2018 - 12/26/2018**

Decline | Instructions ▾ | Graph View | **Add Mood**

Date	Mood
10/29/2018	😕
10/28/2018	🙁
10/27/2018	😣
10/26/2018	🙁
10/25/2018	😊
10/20/2018	🙁
10/19/2018	🙂

Monitor step goal

The monitor step goal tracks the daily step counts that are reported by compatible devices, such as Fitbit and others.

The following list includes best practices when managing your monitor step goal.

- Readings are entered manually or with a compatible device. The compatible device automatically sends the reading to the FollowMyHealth Personal Health Record.
- Only steps from your compatible device or that you entered manually are evaluated for this goal.
- The graph data point tooltip includes the number of steps, date taken, and source.
- The compatible devices are set up through **Devices & Apps** in the FollowMyHealth Personal Health Record.
- You can connect to your compatible device from a monitor step goal on the **Goals** tab.

Telemed Dev Pro 14.2 (Brief)
Take 7,000 steps every day

Decline | Instructions ▾ | Table View | Add Steps

Time Period **10/17/2018 - 12/26/2018** | Last 7 Days **19695** | Daily Average **4245**
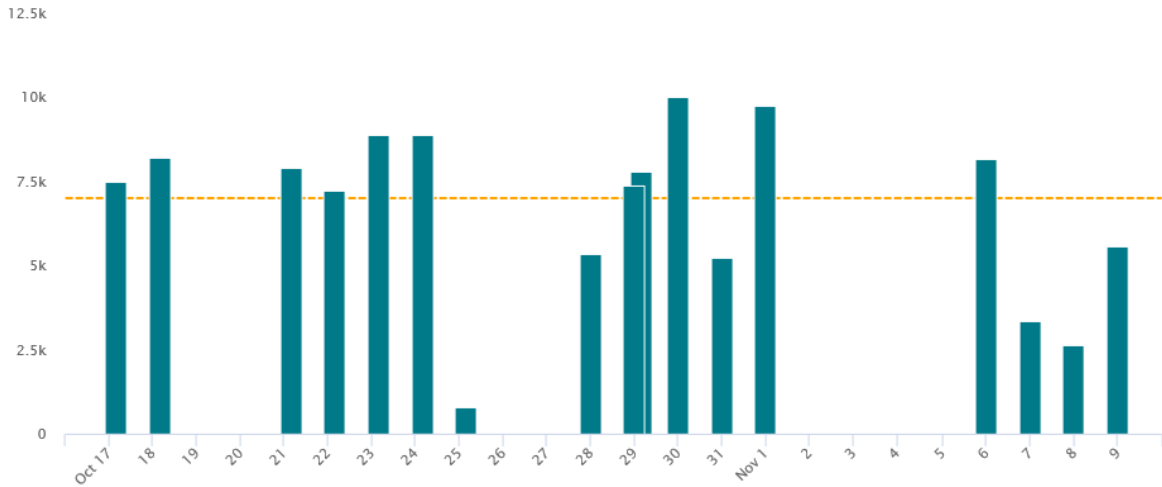
Telemed Dev Pro 14.2 (Brief)
Take 7,000 steps every day

Decline | Instructions ▾ | Graph View | Add Steps

Time Period **10/17/2018 - 12/26/2018** | Last 7 Days **19695** | Daily Average **4245**

Date	Steps	Source
11/09/2018	5555	Manual Entry
11/08/2018	2626	Manual Entry
11/07/2018	3333	Manual Entry
11/06/2018	8181	Manual Entry
11/01/2018	9752	Manual Entry
10/31/2018	5252	Manual Entry
10/30/2018	10000	Manual Entry
10/29/2018	7777	Manual Entry
10/29/2018	7373	Manual Entry

Managing your goals

View goals and readings

You must accept a new goal to add the goal to the **Goals** tab.

Before you begin
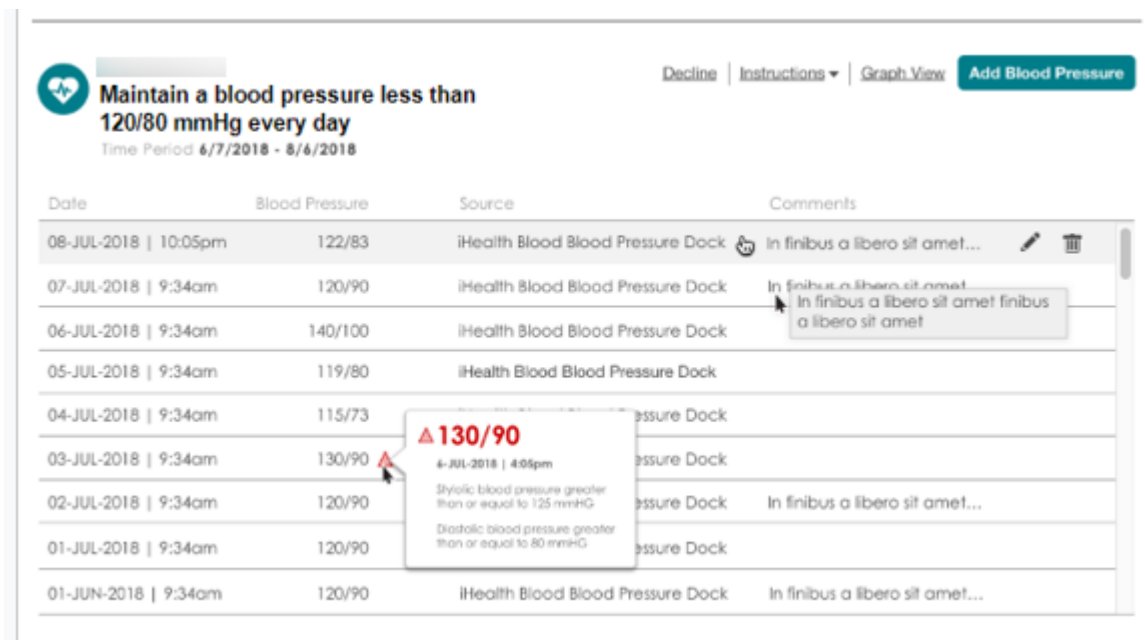
You must have at least one goal (accepted or unaccepted) assigned to you to display the **Goals** tab under **Wellness**. A message on both the **Summary** and **Goals** tabs indicates the number of unaccepted goals that are assigned to you until you accept or decline them.

1. After you sign in to the FollowMyHealth® Personal Health Record, click **Wellness > Goals**.

    Alternatively, click the goal notification in the **Action Center** to access the **Goals** tab.

    You can also click the **Get started now** link in the **New Goals!** banner at the top of the **Summary** tab to accept your new goals.

    Goals opens. A **New Goals!** banner at the top of the page includes a **Get started now** link.

    If you have currently active goals, the latest goal readings are displayed.

    Figure 6: Goal readings

2. To change the goals view, click **Graph view** or **Table view** to switch between the two views.

3. To edit a reading from the table view, click ✎.

4. To remove a reading on the table view, click ✕.

5. To restore a reading, go to **My Account > Preferences > Restore Deleted Items**.

Accept a new goal

You must accept a new goal to get started. By accepting the goal, you consent to share information that is related to the goal with the ordering provider and care team.

1. Sign in to the FollowMyHealth® Personal Health Record.

2. Open the **Goals** tab in either of the following ways.

   • Click **Wellness > Goals**.
   • Click the **Action Center** new goal notification.

3. Click **Get started now** in the banner at the top of the page.

   New Goals displays the list of new goals for you to accept or decline.
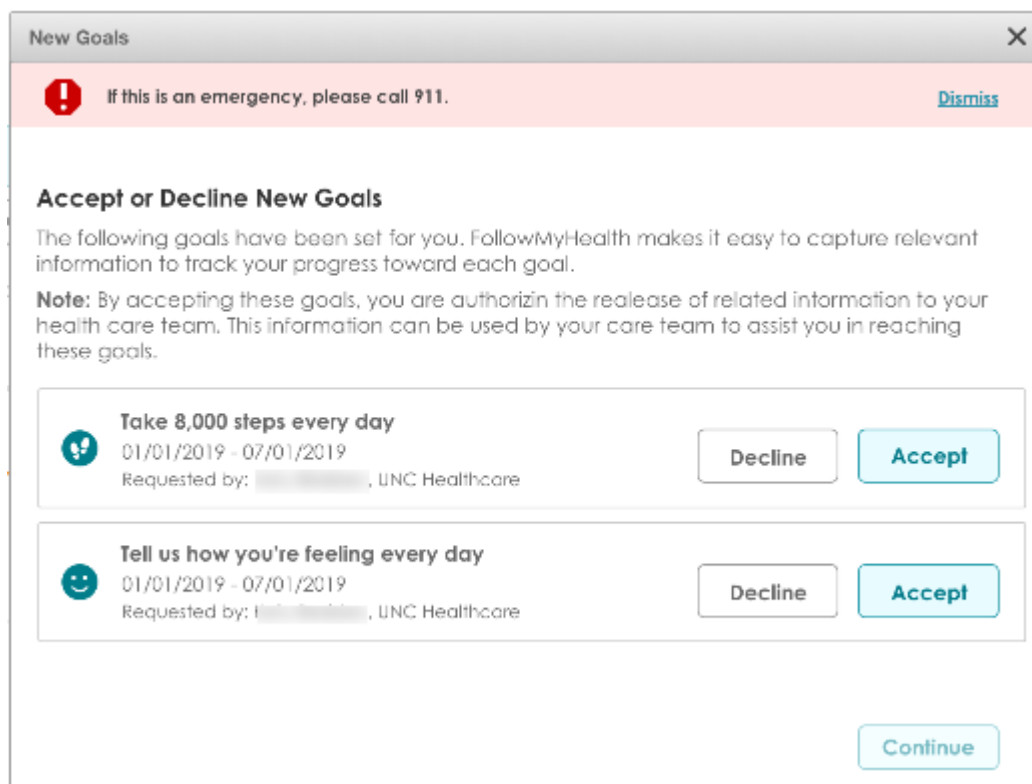
4. Select **Accept** or **Decline** for each goal.

If you have an active goal of the same type that you accepted, a **Duplicate Goals** message is displayed. If you accept the new goal, your current goal is completed and final results are sent to your care team.

5. Click **Continue**.

   Default reminders for each accepted goal are listed. You can accept, edit, or delete the reminder.

   You can also click **Manage reminders** to modify reminders for your currently active goals, add more reminders, and manage how reminders are sent.

   - Select **Email** to receive your reminders through an email message. Click **Change** to update your email address. **Email** is the default communication method.
   - Select **Text Message** to receive your reminders through a text message. Click **Change** or **Remove** to add an alternative mobile phone number. This method can be used only if the mobile phone number is verified.

   If **Email** or **Text Message** are not selected in **My Reminders**, default reminders are not created when you click **Continue**.

6. Click **OK** to accept the goal reminders.

   The **Goals** tab displays your accepted goals. Any active goals of the same type are marked complete and given an end date of today. The new goal of the same type replaces the completed goal. All reminders are removed for the completed goal.

Results of this task

The ordering provider is sent a notification that the goal is accepted.

The **Goal Release of Information Authorization** is created when the goal is accepted or declined and is sent to the **Documents** tab in your FollowMyHealth account.

What to do next

Connect to your wireless device, such as a wireless scale, blood pressure monitor, or blood glucose meter, or manually enter additional readings if you do not have a wireless device.

To changed reminders, click **Goals > My Reminders** or click **Edit** next to **My Reminders** in **Communication Preferences**. You can edit or delete goal reminders only when you accept the goal. You cannot undo an edited or deleted default goal reminder.

Add a reading

You must accept a goal before you can enter a reading.

The goal includes the rules that are set by your provider. If the rules are broken, your provider receives a notification after your reading is entered. You also receive a goal alert in **Action Center** if your reading violates one or more rules set by your provider.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. Click **Wellness > Goals**.
3. Find the goal to which you are adding a reading.
4. For the first reading, click **Record your *reading*** or **Connect a wireless *device*** to have readings sent automatically to the FollowMyHealth® Personal Health Record.

   For example, to enter a weight measurement, click **Record your weight** or click **Connect a wireless scale** to use a compatible device to enter your reading electronically.

   If this is not the first reading, a graph shows your progress to date. Click **Add *reading*** to add an additional reading (for example, **Add Weight**).

5. Add your reading.
6. Click **Save**.

Results of this task

The goal is updated and a graph is displayed. Additional information about each reading is available in a tooltip when you point to each data point.

> **Note:** Only readings that occur within the start and end date are included on the goal.

An alert is displayed on the graph and table view for broken rules.

What to do next

Enter additional manual readings or connect to a wireless device for measurements to continue capturing readings and working to accomplish your goal.

Decline a new goal

You can decline a goal when it is new or active.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Open the **Goals** tab in either of the following ways.

- Click **Wellness > Goals**.
- Click the new goal notification on **Action Center** to access the **Goals** tab.

   Goals opens.
   A banner is located at the top of **Goals**. A link is included to the new goal.

3. Click **Get started now**.

   The **Goals** acceptance page opens.

4. Select **Decline** for the goals you want to decline.

5. (Optional) Update your phone number, Email address, reminders, or goal alerts.

6. Click **Continue**.

Results of this task

The ordering provider is sent a notification that the goal is declined.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

Decline an active goal

You can decline a new or active goal that has been accepted.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **Wellness** tab.

3. Click the **Goals** tab.

   Goals opens.

4. Find the accepted goal that you want to decline.

5. Click **Decline**.

   Decline Goal opens.

6. Click **Decline Goal**.

Results of this task

The ordering provider is sent a notification if you decline the goal.

The **Goal Release of Information Authorization** is created when the goal is declined and sent to the **Documents** tab.

Access devices and applications from a goal

Access **Devices & Apps** from your active goals in the **Goals** tab.

Before you begin

The **Goals** tab only displays if your provider has set a goal for you.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account. When you use the devices to take vital sign measurements for your goal, the readings are viewable in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click the **Goals** tab.
4. Click **Manage Devices & Apps**.

    Connections opens and **Health Sources: Personal Monitoring Devices and Apps** expands.

Results of this task

You accessed **Devices & Apps**.

What to do next

View readings, remove connections, add connections, learn more about devices and applications, or access product websites for devices.

Notifications

Notifications are sent for goal reminders, new goals, completed goals, appointment reminders, personal health record updates, and other health-related reminders.

You can set up goal reminders when you accept a goal or from **My Reminders**. These reminders can be changed at any time.
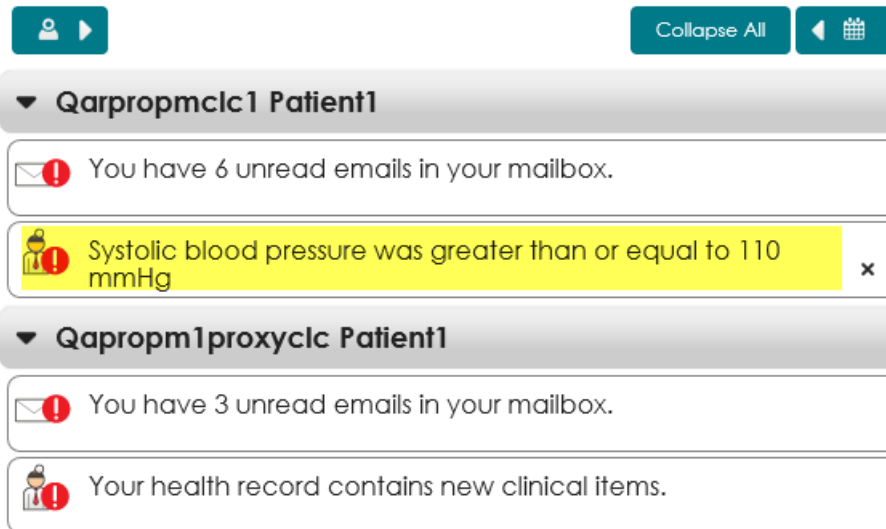
You or an authorized individual can receive goal messages through email and text message.

When a provider creates a new goal for you, you can receive an email or text message. An email message is sent to your **Inbox** in the FollowMyHealth Personal Health Record.

A new goal action item is also displayed under the **Action Center**.

A goal alert is a type of notification that is displayed in **Action Center** if your reading violates one or more rules set by your provider. You or an authorized individual can receive additional goal alerts through email and text message. Goal alerts also display on the **Goals** tab in the graph and table views if a reading violates a rule.

You can configure the notification method when you add the goal reminder on the **Communication Preferences** tab, or when you accept a goal from **Goals**. You cannot turn off broken rule notifications from displaying in **Action Center**.

Add a reminder from My Reminders

You can add a reminder to notify you when to take measurements, when your goal ends, or other customized reminders. These can be sent through email or text messages.

You can also accept default reminders during the goal acceptance process.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click the **Goals** tab.
4. Click **My Reminders**.
5. Select the communication method to receive your reminder.

   • **Send email reminders** sends your reminder through an email message. Click **Change** to update your email address. **Send email reminders** is the default method.

- **Send text message reminders** sends your reminder through a text message. Click **Add a mobile phone number** to add an alternative mobile phone number. This method can be used with a verified mobile phone number only.
- Click **Edit and remove** if you already have a mobile phone number added and want to edit or remove the number.

6. Click **Add Reminder**.

7. For **Name**, enter a name for the reminder.

8. For **Type**, select how often you want to receive the reminder.

   Valid values are:

   - **Once**
   - **Daily** (default)
   - **Weekly**
   - **Monthly**
   - **Yearly**

   The type selected determines the **Frequency** preferences that are displayed.

9. For **This is a reminder to**, select the reason for the reminder.

   Valid values are:

   - **Do something** (default)
   - **Take weight**
   - **Take blood pressure**
   - **Take blood glucose**
   - **Record your steps**
   - **Record your mood**

10. For **Reminder Text**, enter the information that you want to see in the reminder. This is the text that is emailed, or text messaged to the number provided.

11. For **Frequency**, enter how often, the day of week, and the time of day that you want the reminder to occur.

    The reminder type selected in step **6** determines the **Frequency** preferences that display.

    Daily

    The value must be a whole number that is greater than 0 (zero) and less than or equal to 365. The default value is one day.
    The time of day must be valid and set according to your time zone. The default time is now.

    At least one day of the week must be selected.

Monthly

Select an exact day of the month, for example the 15th of each month. Or, select a relative day of the month, for example, the last Sunday of the month.

If you select an exact day of the month, the numeric value displays, and the default value is the current day. This value must be a valid day of the month with a value between one and 31. When the reminder is scheduled to a date that the month does not reach, the last day of the month is changed to the last day of that month. For example, if you select 31 and the month is June, the number is changed to 30. If the reminder occurs on the last day of the month, set the value to 31 and the application changes the value to the last day of the month when scheduling the reminder.

If you select **The**, the other day boxes are replaced with the day of the week and the day within the month it counts for. For example, The Third Tuesday. The value that is entered in the month box must be between one and 12.

The time of day must be valid and set according to your time zone. The default time is now.

Weekly

The value must be a whole number that is greater than 0 (zero) and less than or equal to 52. The default value is one week.

The time of day must be valid and set according to your time zone. The default time is now.

At least one day of the week must be selected.

Yearly

The value must be a whole number that is greater than 0 and less than or equal to 20. The default value is one year.

The time of day must be valid and set according to your time zone. The default time is now.

Month and day default values are today's date. The month list includes all 12 months. The day must be a whole number between one and the number of days in the selected month. Do not enter more than 31.

Once

The date must be in the future. The default value is today's date.

The time of day must be valid and set according to your time zone. The default time is now.

12. For **Duration**, select the start and end date from the calendar tool.

The default start value is the current date.

The duration type has the following valid values:

- **No end date** (default)
- **End by**
- **End after**

If **End by** is selected, a date box displays. You must enter the end date with the calendar tool.

If **End after** is selected, an occurrence box displays. You must enter the number of times that you want the reminder to occur. The number must be a whole number greater than 0 (zero).

13. Click **Set Reminder**.

When you click **Set Reminder**, a validation process is started. If there are no validation errors, the reminder is saved.

> **Important:** If you close the box before you click **Set Reminder**, **My Reminders** closes, and your changes are not saved.

Results of this task
The reminder displays in alphabetical order in the table on **My Reminders**.

Edit a reminder from My Reminders

You might want to change a reminder. In this scenario, you can edit the reminder from **My Reminders**.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click the **Goals** tab.
4. Click **My Reminders**.
5. Click the reminder that you want to edit.
6. Enter the changes for the reminder.
7. Click **Set Reminder**.

   The reminder closes, and the reminders list is updated to show your changes.

Results of this task
You edited the reminder.

Delete a reminder from My Reminders

You can delete a reminder from **My Reminders**.

You can also delete default reminders during the goal acceptance process.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **Wellness** tab.

3. Click the **Goals** tab.

4. Click **My Reminders**.

5. Click the reminder that you want to delete.

6. Click **Delete**.

    Confirm Delete opens.

7. Click **Delete**.

Results of this task

You deleted the reminder and it is removed from **My Reminders**.

Measurements

You can view and add measurements related to health goals, including **Blood Pressure**, **Mood**, **Steps**, and **Weight**.

All tabs under the **Measurements** tab are available to all patients, regardless if you have a goal set by your provider.

Blood Pressure displays as the default view when you open the **Measurements** tab.
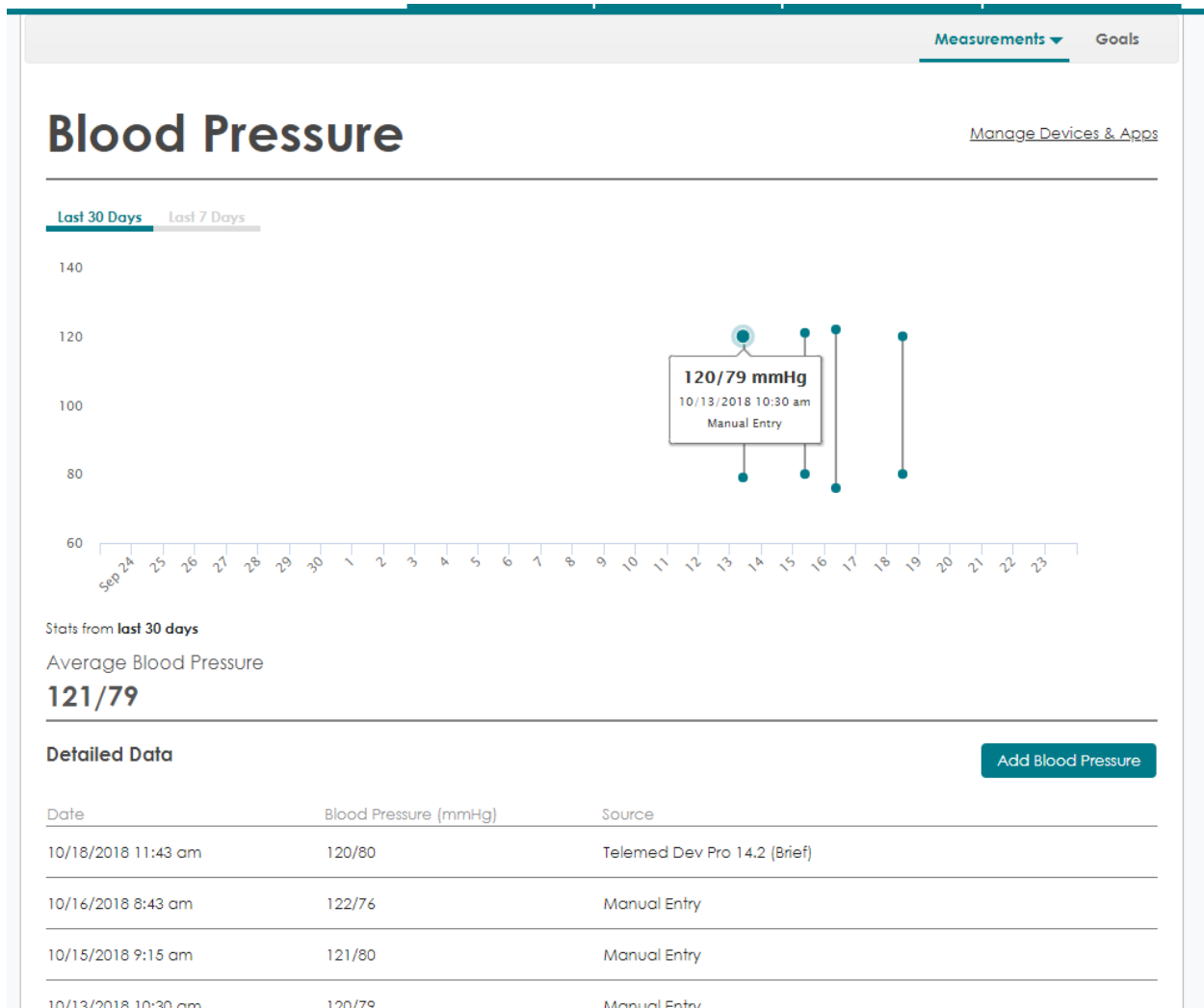
Record a blood pressure reading

Track your blood pressure by recording a reading in the **Blood Pressure** tab in **Measurements**.

You can also connect a wireless device to automatically add blood pressure readings.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click the **Measurements** tab.

    The **Blood Pressure** tab displays as the default view.

4. Click **Add Blood Pressure**.

Add Blood Pressure opens.

5. For **Date**, enter the date of the reading.

6. For **Time**, add the time you took your blood pressure.

7. For **Blood Pressure**, enter your blood pressure reading.

8. (Optional) In **Comments**, add information about your reading or activity.

9. Click **Save**.

   Your blood pressure reading displays on the **Blood Pressure** graph and table.

Results of this task

You recorded a blood pressure reading.

Record a daily mood

Track your mood by recording how you feel in the **Mood** tab in **Measurements**.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **Wellness** tab.

3. Click **Measurements > Mood**.

4. Click **Add Mood**.

   Add Mood opens.

5. For **Date**, enter the date you are adding a mood for.

6. Select a facial expression to match your mood.
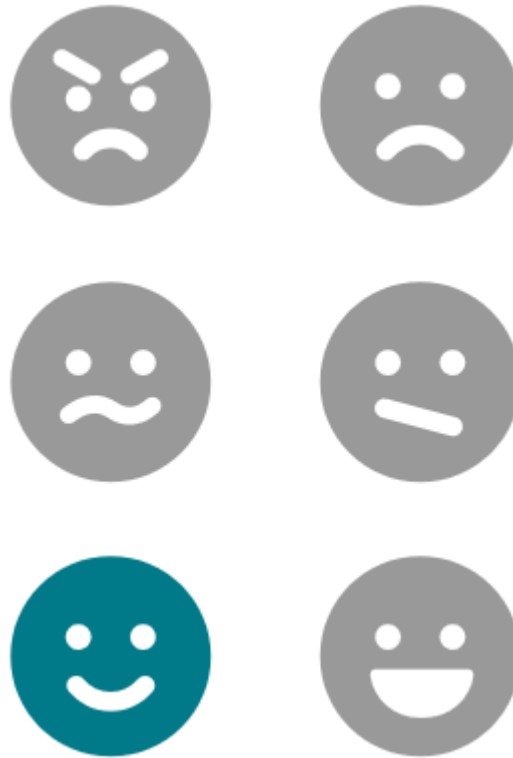
7. Click **Save**.

   Your mood reading displays on the **Mood** graph and table.

Results of this task

You recorded a mood reading.

Record daily steps

Track your steps by recording the number of daily steps in the **Steps** tab in **Measurements**.

You can also connect a wireless device to automatically add daily steps.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Click the **Wellness** tab.
3. Click **Measurements > Steps**.
4. Click **Add Steps**.

   Add Steps opens.

5. For **Date**, enter the date you are adding steps for.

6. For **Steps**, enter the number of steps you took.

7. Click **Save**.

   Your recorded steps display on the **Steps** graph and table.

Results of this task
You recorded daily steps.

Record a weight measurement

Track your weight by recording a reading in the **Weight** tab in **Measurements**.

You can also connect a wireless device to automatically add weight readings.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **Wellness** tab.

3. Click **Measurements > Weight**.

4. Click **Add Weight**.

   Add Weight opens.

5. For **Date**, enter the date of the reading.

6. For **Time**, add the time you weighed yourself.

7. For **Weight**, enter your weight reading.

8. (Optional) For **Comments**, add information about your reading.

9. Click **Save**.

   Your weight reading displays on the **Weight** graph and table.

Results of this task
You recorded a weight reading.

Access devices and applications from Measurements

Access **Devices & Apps** from the Measurements tab.

Devices & Apps is a device application library that enables you to search for and install device applications. When you install the device application, a connection is created between the device and your FollowMyHealth Personal Health Record account. When you use the devices to take vital sign measurements, the readings are viewable in the FollowMyHealth Personal Health Record.

1. Sign in to the FollowMyHealth Personal Health Record.

2. Click the **Wellness** tab.

3. Click the **Measurements** tab.

4. Open a tab under **Measurements**.

   You can connect to **Devices & Apps** from either the **Blood Pressure**, **Steps**, and **Weight** tab.

5. From the the tab, click **Manage Devices & Apps**.

   Connections opens and **With Devices and Apps through Health Sources** expands.

Results of this task

You accessed **Devices & Apps**.

Chapter 9
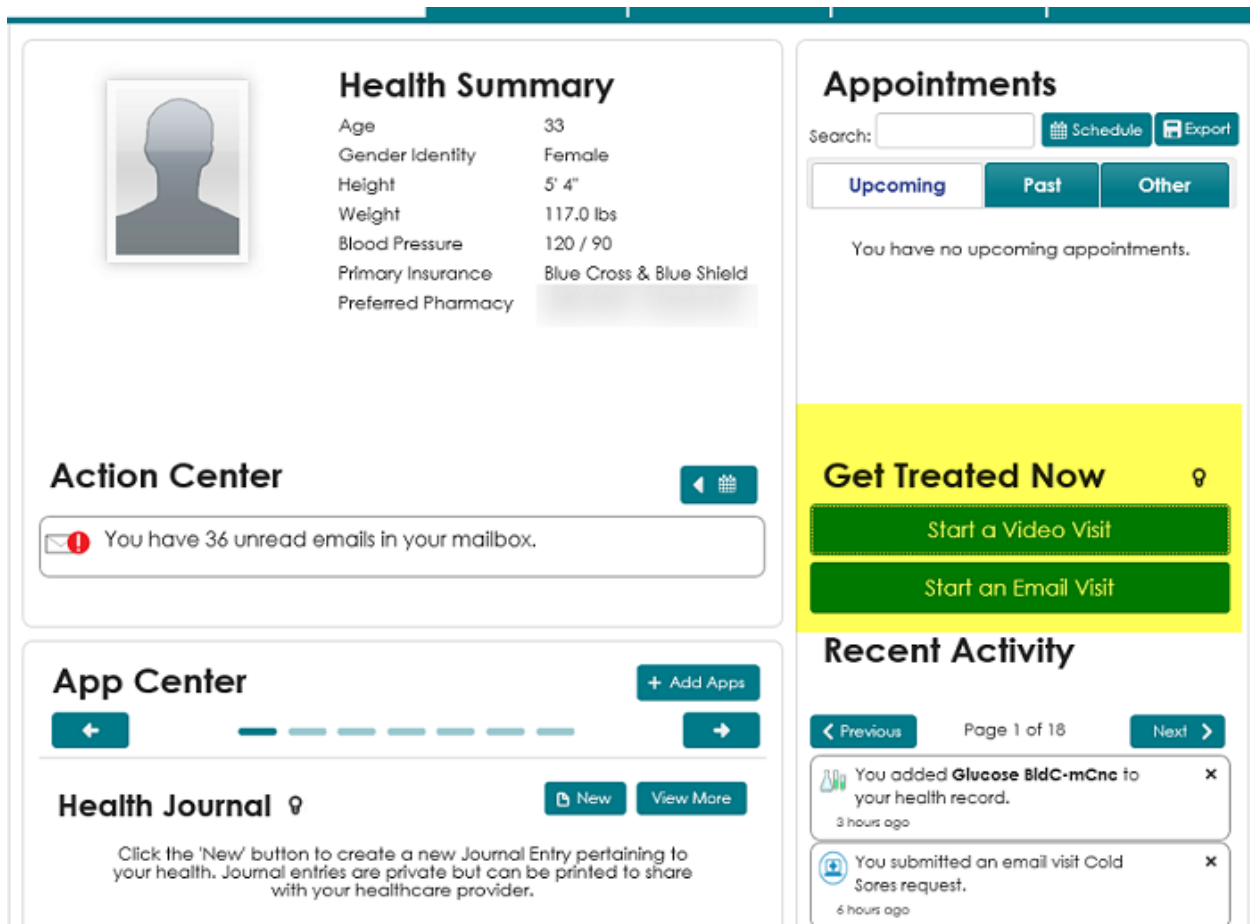
Video visits

On-demand video visits

Use the FollowMyHealth Video Visit feature to participate in a live clinical consultation with a provider through a video conference.

You can participate in on-demand video visits with a provider in your healthcare organization.

An on-demand video visit is started when you click **Start a Video Visit** from the **Get Treated Now** section on your FollowMyHealth Personal Health Record **Home** tab.

In this workflow, you can select a provider who is available for a video visit on the same day.

You must have a connection with an organization that supports on-demand video visits to see the **Start a Video Visit** button.

If the provider with whom you connected in the video visit supports payment features, you can pay for your video visit at the time of the service.

If the healthcare organization to which your provider belongs has enabled support for attachments, you can share attachments with the provider during the video visit.

> **Note:** If the on-demand video visit is not available, the **Appointment** section of the **Home** page still displays upcoming appointments, where you can manage your appointments (for example, cancel, reschedule, and so on.).

Start an on-demand video visit

On-demand video visits are a convenient alternative to traveling to your healthcare organization for a visit with a provider. You can consult with a provider from a remote location using a desktop computer or tablet through your FollowMyHealth Personal Health Record account.

Before you begin

When you start the video visit and **Request a Video Visit** opens, the application detects whether you have installed the most current plug-in and supported browser. A message is displayed if these requirements are missing. A link is available to download the latest plug-in, or you can use a browser that is already supported by the video service.

As you progress through a video visit, the **Action Center** on your FollowMyHealth Personal Health Record **Home** tab includes notifications. See the related topic, "Action Center video visit notifications" to learn more about the notifications you see during the video visit workflow.

1. Sign in to the FollowMyHealth® Personal Health Record.
2. On the **Home** tab, go to **Get Treated Now** and click **Start a Video Visit**.

   The organizations that are available for an on-demand video visit are displayed with available office hours under **Video Visit Practices**. The estimated wait time is displayed next to the organization.

3. Click **Select** next to the organization with which to initiate a video visit.

Review the "Things to know" items before continuing.

4. Click **Next**.

   Telehealth Terms of Service is displayed if you have not yet accepted the terms of service.

5. Click **Accept**.

6. Review your current audio and video settings.

   > **Note:**
   >
   > If your application detects that you do not have the correct plug-in, the following error message is shown.
   >
   > **Plug-in Required for Browser:** This browser requires you to download a plug-in to use this feature of FollowMyHealth. Please download the plug-in here or use a different browser.
   >
   > **Download Vidyo Plug-in**
   >
   > Click **Download Vidyo Plug-in** to install the correct plug-in.
   >
   > Follow the prompts to install the video plug-in. After installation is complete, you are automatically signed out of the FollowMyHealth Personal Health Record. When you sign back in, the video and audio settings are filled.

7. (Optional) Modify the video and audio connection sources as needed.
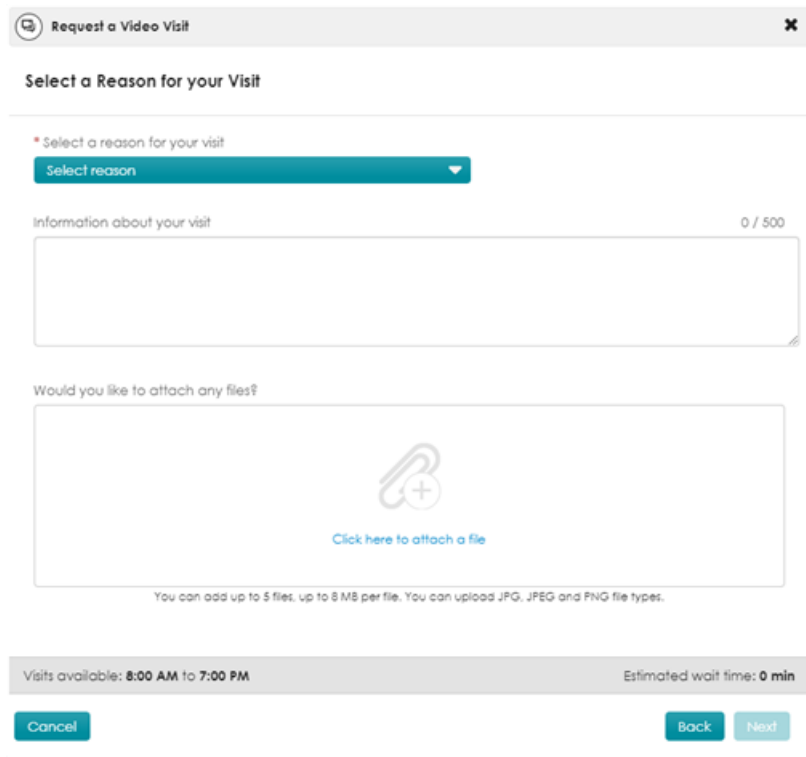
   If you need assistance with audio and video settings, click **Need help**.

   A link is available to find answers on the **Frequently Asked Questions** support page.

8. Click **Next**.

9. Click **Select reason** to display a list of symptoms, and then select a symptom from the list.

   Later, when the video visit starts and the video page opens, the reason that you selected for your visit is listed under **Summary**.
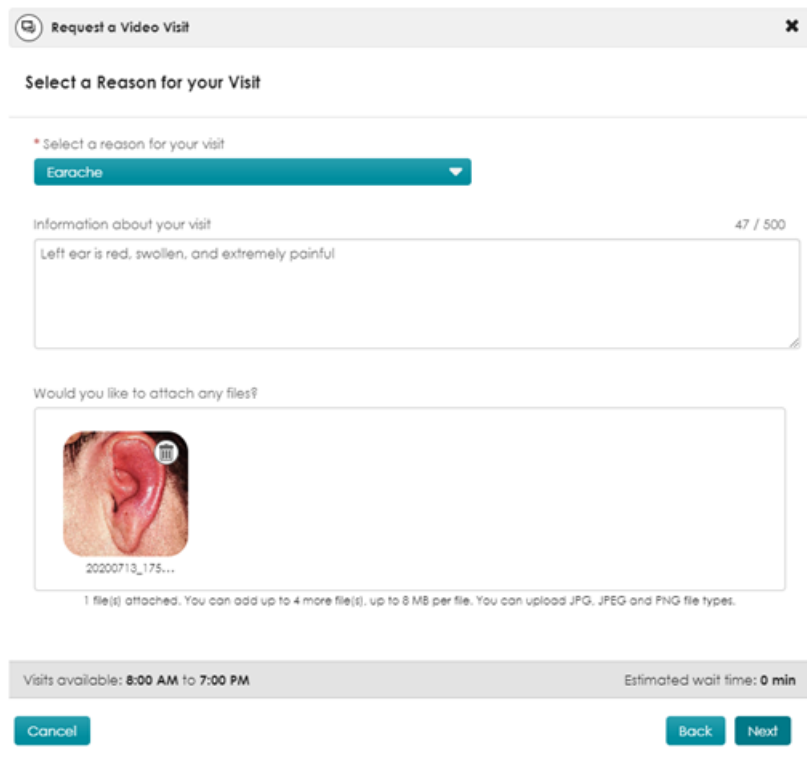
10. (Optional) Enter additional information (up to 500 characters) about the reason for your visit that your provider.

11. (Optional) If your selected provider has enabled the attachments option, you can attach any files that you want to share with your provider to review.

You can attach files in either of the following ways.

- Drag and drop files from a folder on your computer into **File Upload**.
- Click **Click here to attach a file** to browse and select files from a folder on your computer.

Add up to five files in .JPG, .JPEG, or .PNG file formats. The maximum file size is 8MB per file.

After a file uploads, a thumbnail view is displayed.

All attachments are available to the provider during the visit and in Video Visit Reports after the visit.

12. Click **Next** to review and update your preferred phone number and pharmacy information.

13. Review your phone contact and preferred pharmacy information to confirm that the information is correct and make changes if necessary.

   This information is helpful to your provider during the visit so that your healthcare provider can contact you if needed or send a prescription promptly after the video visit.

14. (Optional) Click **Go To Payment Page** if your organization has enabled the on-demand video visit payment feature.

   Enter your credit card or bank account information, click **Pay Now**, and complete the required information. A payment receipt and a summary of your payment is displayed and a confirmation email is sent to your messages folder.

15. Click **Go to Virtual Waiting Room**.

   You are now in the virtual waiting room and are an active patient in the provider's patient queue. The reason for your visit, the organization associated with your visit, and the approximate time that your visit starts are shown.

   If needed, click **Change Audio/Video Settings** to change settings from the **Virtual Waiting Room**.

Your provider might send a notification to update you on the wait time. This message is displayed on your **Virtual Waiting Room** screen and might also be sent to you by email or text message.

When the provider selects you in the queue, your on-demand video visit begins automatically. The video page opens and the message, `Please wait. We will be with you soon!` is displayed.

The reason for your visit, your preferred phone number and pharmacy information are displayed to the right of the video screen.

16. When the provider starts the video visit, the visit opens and video images are displayed on the screen.

   See the related reference, "Video visit screen overview", for a description of this screen and its controls and functions.

17. (Optional) If you need to leave video session temporarily, click **Leave**.

   The video session closes but is not ended. You return to the Home page of the FollowMyHealth Personal Health Record, and under **Get Treated Now**, there is a button, **Video Visit in Progress - Reconnect**.

18. (Optional) To return to the video session, click **Video Visit in Progress – Reconnect**.

   The video page reopens, and you can continue with the video visit.

19. To end the video visit, click **End Visit**.

What to do next

Plan your follow-up visit. If you requested that the provider send you a visit summary through email, check your **Messages** tab to view the visit summary.

Related concept information
On-demand video visits on page 199
Related reference information
Action Center video visit notifications on page 224
Video visit screen overview on page 222

Start an on-demand video visit without a FollowMyHealth account

If you are new to FollowMyHealth and do not have a FollowMyHealth account but need to be seen immediately by a provider, you can access an organization's FollowMyHealth Universal Queue to request an on-demand video visit with a provider.

Your provider might contact you through an email or text message and provide a link, or there might be a link available on the provider's web site where you can request an on-demand video visit without a FollowMyHealth account. Click the link to begin the request process and provide information about you and your symptoms. Based on your responses, your provider can determine whether an on-demand video visit is warranted or an in-office visit or other action is more appropriate. If an on-demand video visit is warranted, you are added to the patient queue to wait for an available provider.

1. Access the on-demand video visit link from your provider's web site or through the invitation received as an email or text message.

    If on-demand video visits are available, the hours of availability and estimated wait time is displayed, along with a **Get Started** button. Your provider might also offer an option to sign in to your existing account, if you have one.

    > **Note:** The **Get Started** option is not available if the current time is outside the on-demand video visit hours of operations.

2. If you have an existing account with your provider, click the link to sign in and request a visit. If you do not have an account and on-demand video visits are available, click **Get Started**.

3. If available, review the list of **Things to Know** related to your visit request.

4. Select a reason for your visit.

5. Read the terms of use and check **I have read and agree to the Terms of Use**.

    > **Note:** You must accept the terms of use to use the on-demand video visit service.

6. Click **Next**.

7. Depending on your browser, you might need to review and grant any permissions to your browser for your device's available camera, microphone, and speakers.

8. Select your camera in the **Video Connection** drop-down and your microphone and speakers in the **Audio Connection** drop-down.

    Use the play icon (▶) for testing your speakers to ensure audio output is working correctly before your visit. The video preview displays your chosen camera's live input, both audio and

video, displaying a dynamic green bar at the bottom to indicate the microphone input level from sounds such as speech.

> **Important:** Ensure your audio and video input/output devices are configured and working correctly each time before you request a visit.

9. Click **Next**.
10. Answer any on-screen questions from the provider to help understand your symptoms.
11. Click **Next**.
12. Enter your demographic and contact information.

> **Note:** Fields with a red asterisk are required.

13. Click **Next** to join the **Virtual Waiting Room**.

    You are now in the virtual waiting room and are an active patient in the provider's patient queue. The reason for your visit, the organization associated with your visit, and the approximate time that your visit starts are shown.

    > **Note:** At any time, if you decide not to go forward with the on-demand video visit, click **Cancel Visit**, and then confirm the cancellation. If you cancel the visit request, you lose the information that you entered and your place in the provider's patient queue.

    If needed, click **Change Audio/Video Settings** to change settings from the **Virtual Waiting Room**.

    Your provider might send a notification to update you on the wait time. This message is displayed on your **Virtual Waiting Room** screen and might also be sent to you by email or text message.

    When the provider selects you in the queue, your on-demand video visit begins automatically. The video page opens and the message, `Please wait. We will be with you soon!` is displayed.

    The reason for your visit, your preferred phone number and pharmacy information are displayed to the right of the video screen.

    If you get disconnected from the visit, do the following:

    a. Return to the link on your provider's web site.
    b. Enter your last name, date of birth, and then click **Rejoin Visit**.

    > **Note:** If this is not your visit, click **This is not my Visit**, and then select **Yes, End Visit** to start a new visit.

14. When the provider starts the video visit, the visit opens and video images are displayed on the screen.

See the related reference, "Video visit screen overview", for a description of this screen and its controls and functions.

15. (Optional) If you need to leave video session temporarily, click **Leave**.

    The video session closes but is not ended. You return to the Home page of the FollowMyHealth Personal Health Record, and under **Get Treated Now**, there is a button, **Video Visit in Progress - Reconnect**.

16. (Optional) To return to the video session, return to the link on your provider's web site, enter your last name, date of birth, and then click **Rejoin Visit**.

    The video page reopens, and you can continue with the video visit.

17. To end the video visit, click **End Visit**.

Related reference information

Scheduled video visits

Scheduled video visits are real-time clinical consultations between a provider and a patient (and other participants) through a video conference that is scheduled for a future date.

Patients can access the scheduled video visit features of FollowMyHealth regardless of whether or not they have a FollowMyHealth account:

- Patients with an account can schedule video visits through the Appointments feature of the FollowMyHealth Personal Health Record.
- Patients without a FollowMyHealth account can schedule an appointment with their provider, and receive an invitation from their provider through a text message or email, with a link to join the video visit.

Video visits that are scheduled through a FollowMyHealth account include the following features:

- If enabled by the organization, patients can directly schedule or request a scheduled video visit by clicking **Schedule** from **Appointments**
- Patients can select a video visit, if available, as the type of appointment to schedule.
- The scheduled video visit is displayed in the patient's **Upcoming** appointments.
- Patients can join the video visit up to 15 minutes before the scheduled start time.
- If the organization allows attachments to be added to the video visit, patients can do so before or during their scheduled video visit.

    Note: The **Appointments** section of the FollowMyHealth Personal Health Record displays upcoming appointments, where users can manage their

appointments (for example, cancel, reschedule, and so on). If for some reason the scheduled video visit is not available within 15 minutes and the **Join Visit** button is not enabled, patients can cancel and reschedule the visit for another time.

Schedule a video visit

You can schedule a video visit for a later time in the same day or for a future date and time. To request a video visit an available provider now, see the related topic, "On-demand video visits."

1. Sign in to the FollowMyHealth® Personal Health Record.
2. From **Appointments** on the **Home** tab, click **Schedule**.
3. Choose your organization.

    Note: Video visits might not be available to your organization. If you are connected to only one organization then you can skip this step.

4. Click **Continue**.
5. Select a video visit appointment type and click **Continue**.

Schedule an Appointment ✕

❗ If this is an emergency, please call 911   Dismiss

Organization **FMH-QAR-Pro720(DEMOSTOREON)**

Choose an appointment type

Acute Visit

Follow Up Visit

New Patient

Office Visit

Recheck

Video Visit   ✓

[Continue]

The selected appointment type is indicated by a check mark shown on the selected appointment row.

6. Click **Continue**.
7. Select a provider.

    a) Choose a provider from the displayed list or select a new provider.

        If you do not want to select a listed provider, click **Find a provider** to select from a list of list of additional providers who are within your connected organization and available for new patient appointments.

    b) In **Find a provider**, enter the name of the provider or select ▽ to filter your search criteria.

        As you enter the provider's name, matching text appears.

    c) Next to the provider's name, click the down arrow to view additional details about the provider.

        Details might include:

- **Biography**
- **Specialties**
- **Available locations** (including addresses and telephone numbers) and **Get Directions**

Click the arrow again to collapse the provider's details.

d) Select any of the following options in your search criteria:

> **Note:** By default, no filters are selected.

- **Include providers not accepting online appointments from new patients**: When selecting this option, a badge displays next to the providers name when a provider does not accept online scheduling for new patients.

> **Note:** You must call the provider's office to schedule an appointment.

- **Gender**
- **Specialties**
- **Locations**

e) Click **Apply**.

A list of providers matching your criteria appears. If no results are found, go back and adjust your filter criteria.

> **Tip:** Move your cursor over the filter criteria box to display selected filtering criteria.
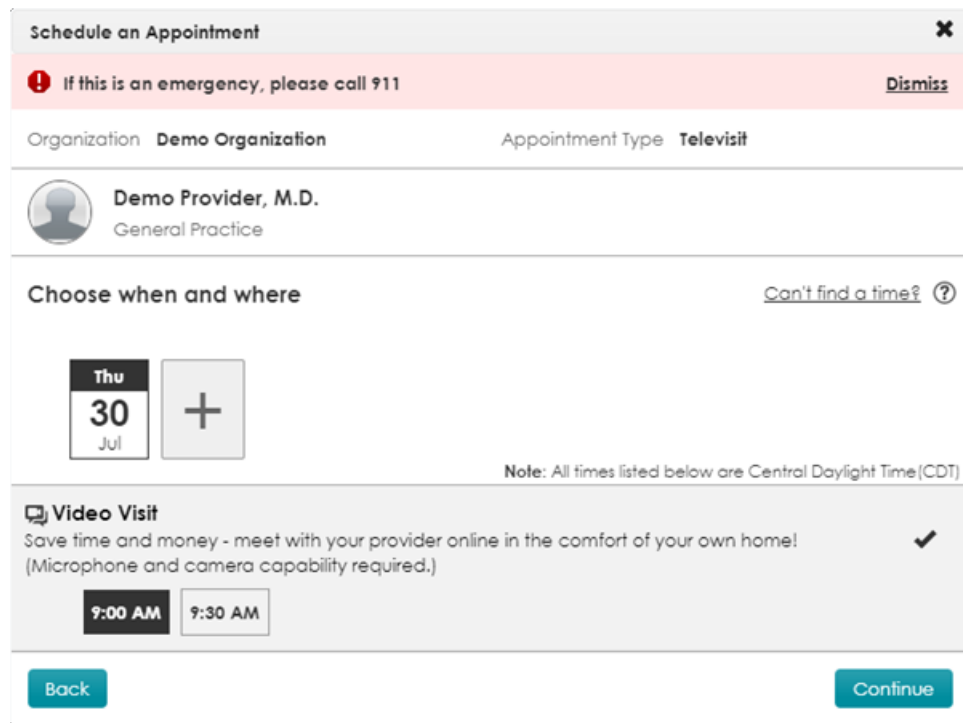
f) Select the provider from the search results.
g) Click **Continue**.

8. If your provider allows direct scheduling, then do the following:

- Click **Next Available**.
  The next available calendar date is displayed in a single date box under **Choose when and where**. The appointment times that are available for this date are also shown.

If you do not want the first available date, click the large plus sign and select **Find next available** or click **View calendar** to select a date from the calendar.

- Click **View Calendar**.
  When you select a date, the date is shown as a single date box under **Choose when and where**.

a) Select a Video Visit time slot.

   Several appointments might be listed, including face-to-face appointments and video visit appointments. When a video visit is available, **Video Visit** is listed as the location.

b) Click **Continue**.

c) Enter the reason for your appointment in **Why are you scheduling this appointment**.

d) Click **Schedule Your Appointment**.

   A confirmation is displayed indicating that your appointment has been scheduled, along with a summary of your appointment information.

e) Save the appointment details to your personal calendar or print the information.

f) Click **test your system before your scheduled visit time** to test your audio and video settings.
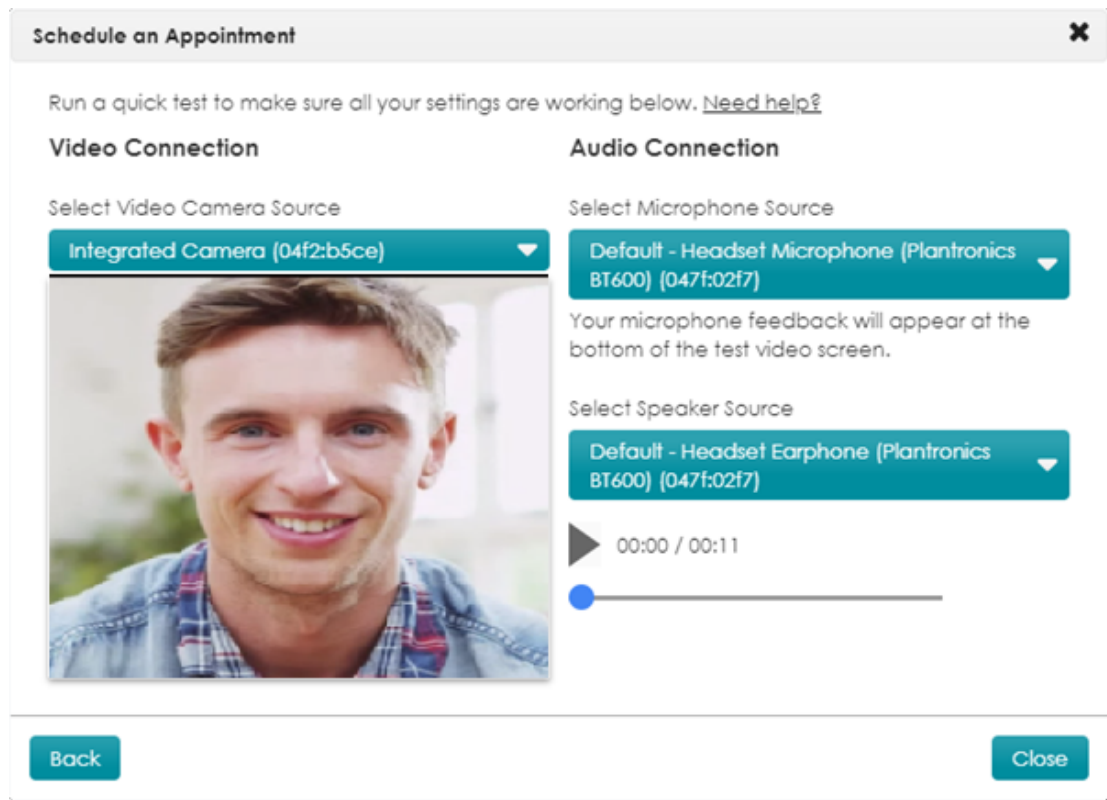
Test the volume and verify that your microphone is working and your image is displayed on the video page.

An appointment is reserved and an email is sent with the appointment details to your FollowMyHealth Personal Health Record **Messages**.

9. If your provider does not allow direct scheduling, then request an appointment:

   a) If your provider and appointment types support **Location Preference**, select at least one location where you prefer your appointment.

   b) Click **Continue**.

Location preference (you may choose more than one)

🖵 **Video Visit**
Save time and money - meet with your provider online in the comfort of your own home!
(Microphone and camera capability required.)

In Office Visit
Take the traditional approach - travel to this provider's office and conduct your visit in person.

   c) From **When do you need an appointment**, select **First Available** or the number of weeks out that you want the appointment.

   d) Select the days that you are available.

      You can select a date up to one year in advance, when requesting an appointment.

   e) From **Select window of availability**, select **Anytime** or a window of time that you are available.

      When you click **After** or **Before**, a time box displays. For example, if you are available after 9:00 AM, select **9:00 AM** from the menu.

      If you are available during a longer time during the day, click **Between** to set a window of availability. For example, if you are available between 8:00 AM and 5:00 PM, select **8:00 AM** in the first time box and **5:00 PM** in the second time box.

   f) Click **Save time preference** for each appointment day and time selection.

      The appointment choices are listed in **Date and time preference**.

      To add more time preferences, click **Add another time preference**. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon ✕ next to the list item.

   g) When you are done adding appointment dates and times, click **Continue**.

   h) Enter the reason for the appointment in **Why are you scheduling this appointment**.

   i) Click **Schedule Your Appointment**.

      A message is sent to your provider or organization with schedule information. The provider or organization reviews the appointment and schedules the appointment based on the availability that you provided. However, the provider might contact you to offer other available times. This process might take several hours or longer to complete. After the provider completes this process, the appointment displays in the appointment list.

10. Click **Close**.

Results of this task

Fifteen minutes before your scheduled video visit start time, an appointment reminder is sent to your **Messages** and the **Join Visit** button is shown next to your appointment under **Appointments** on the **Home** tab.

Related concept information
On-demand video visits on page 199
Related reference information
Action Center video visit notifications on page 224

Joining a scheduled video visit

Scheduled video visits are a convenient alternative to traveling to your healthcare organization for a visit with a provider. You can consult with a provider from a remote location using a desktop computer, tablet, or mobile device.

You can join a scheduled video visit from the FollowMyHealth Personal Health Record from an Action Center item or from the **Appointments** section on the **Home** screen.

If you do not have a FollowMyHealth account, you can still join a scheduled video visit by clicking a "Time to Join" link in a text message or email sent to you by your provider.
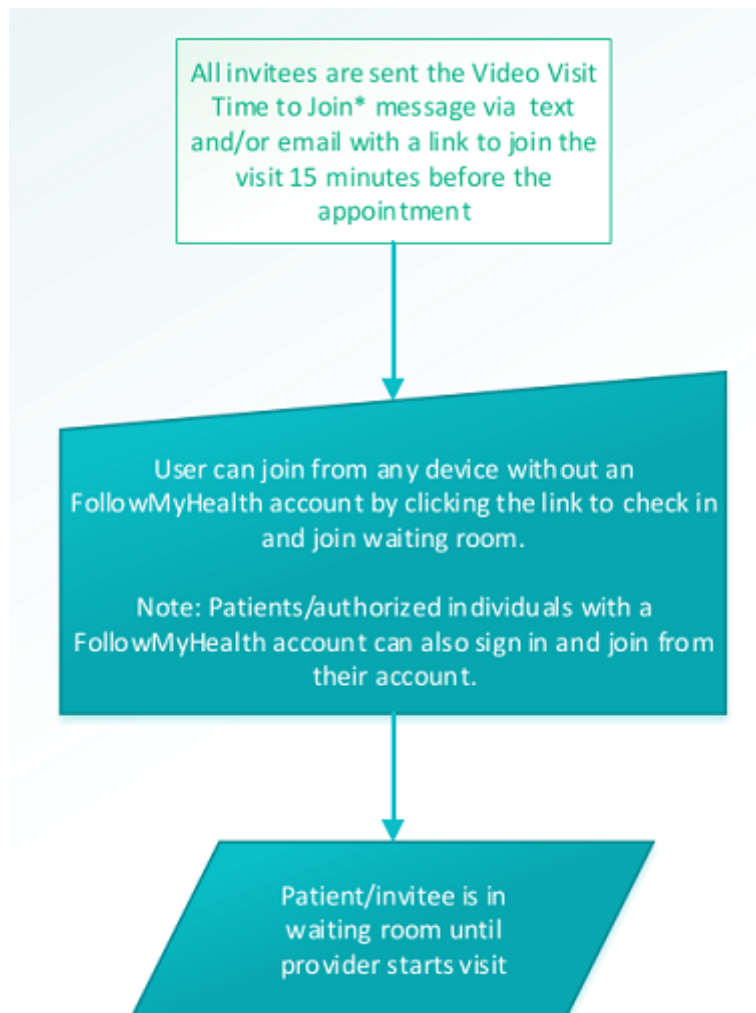
When you join the video visit, the application detects automatically whether you have the most current plug-in installed and are using a supported browser. A message is displayed if these requirements are missing. You can click the available link to download the latest plug-in if needed, or you can use a browser that is already supported by the video service.

Join a scheduled video visit from an email or text message

Patients, caregivers, authorized individuals, or other invited users can join a scheduled video visit by clicking a link in a video visit "Time to Join" email or text message, regardless whether or not they have a FollowMyHealth account.

When you schedule a video visit (outside of FollowMyHealth) with your provider, you receive an email or text message 15 minutes before your visit notifying you that it is time to join the visit.

1. Click the link in the "Time to Join" message.
2. You are asked to fill out a form and provide your first and last name and your relationship to the patient, selected from a drop-down menu.

   This information is used to identify you in the visit details and video visit session. You can select from the following values to describe your relationship to the patient:

   - Patient (yourself)
   - Parent
   - Authorized Individual / Guardian
   - Legal Representative
   - Provider / Specialist
   - Interpreter
   - Other

3. You are asked to confirm the Terms of Service.

   This is required to proceed with the video visit.

4. You are asked to check your camera, microphone, and speakers on your computer and enable them if needed for use with video visits.

   Follow the on-screen prompts to test your audio and video settings as needed.

5. Click **Next** when done.

   You are taken to the virtual waiting room to wait for your visit to start.

   - If you join the visit before the provider has started the video, you are instructed to leave this window open, and that you will be notified when the provider is ready.
     All users that have joined the visit before the visit starts receive an email or text (or both) notification that the provider is ready to see them when the provider starts the video.

   - If you join the visit after the provider has started the video, you are instructed to stay on that screen. No other notification is sent. You are launched into the video session automatically when you are admitted by the provider.

   A link to modify your video and audio settings is available if needed, and settings are honored when the video visit starts. A **Leave** option is also available to the patient if they need to temporarily exit the waiting room (this option is not available to other non-provider participants).

6. The provider joins the visit and starts the video session.

   Everyone who is in the virtual waiting room is admitted automatically into the video visit session. A text message or email is also sent to let you know that the provider is ready to see you and that the video visit is in session if you navigated away from the virtual waiting room.

   > **Note:** This message is sent only to users who joined with their contact information from the original invitation.
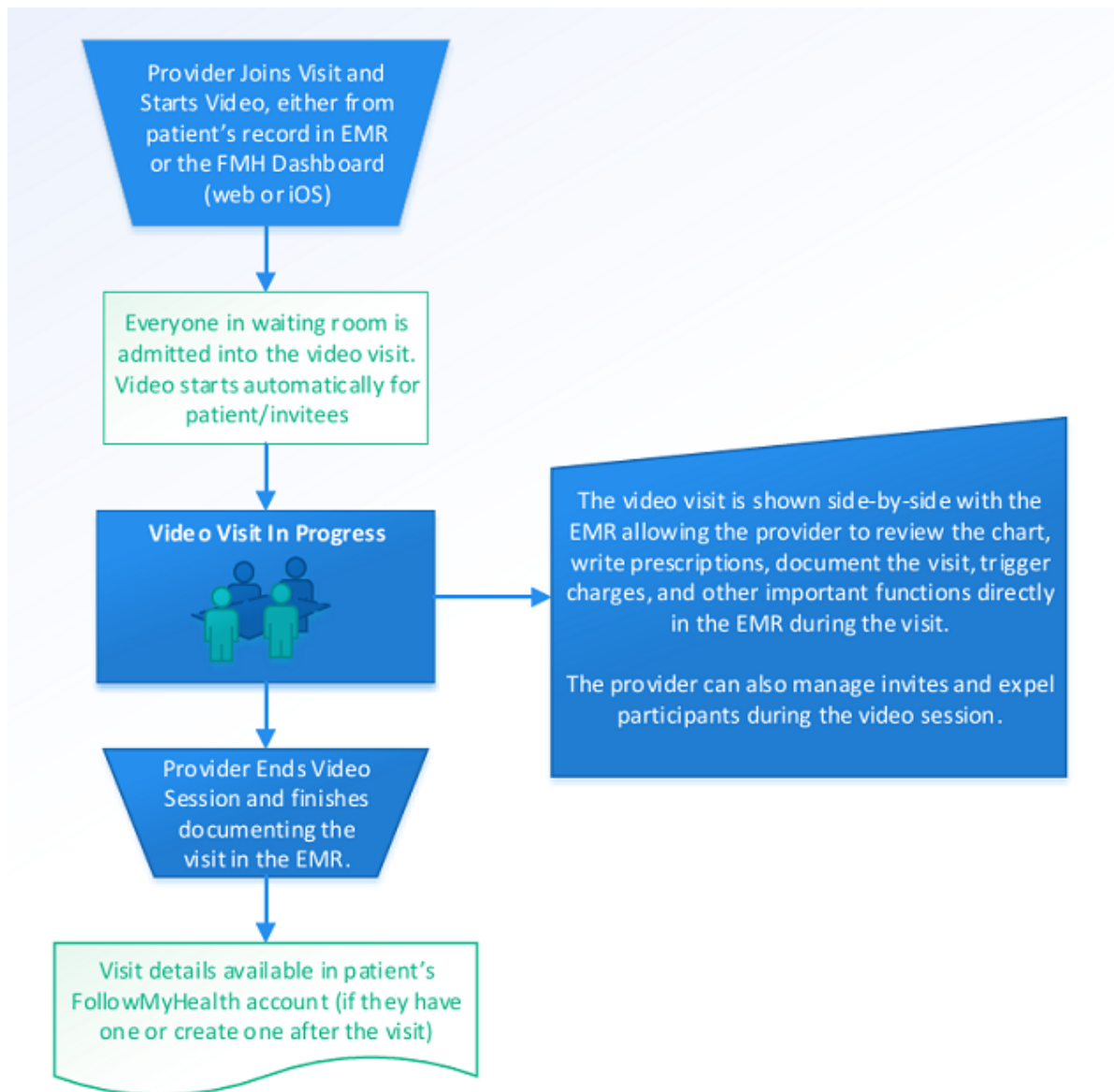
Join a scheduled video visit from a FollowMyHealth account

When the provider for your connected organization is available for your appointment, your scheduled video visit is initialized and you are notified to join.

Fifteen minutes before your scheduled video visit start time, an appointment reminder is sent to your **Messages** inbox and **Join Visit** is displayed next to your appointment under **Appointments**

on the **Home** tab of the FollowMyHealth Personal Health Record. The notification is not sent if the appointment is pending cancellation.

> **Note:** If for some reason the scheduled video visit is not available, use the cancel and reschedule functions to reschedule the appointment for another time.
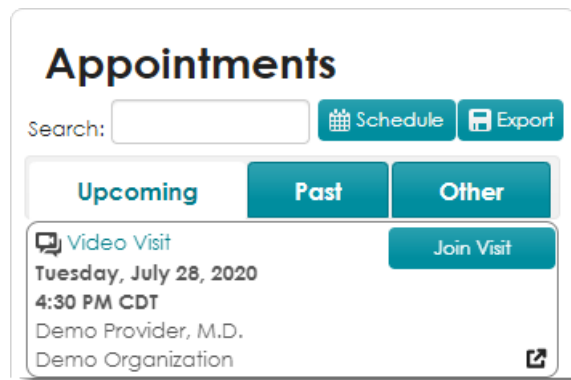
As you progress through a video visit, the **Action Center** on your FollowMyHealth Personal Health Record **Home** tab includes notifications. See the related topic, "Action Center video visit notifications" to learn more about the notifications you might see during the video visit workflow.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Accept the Telehealth Terms of Use, if applicable.
3. Do either of the following:

   - From **Home > Appointments** under **Upcoming**, find your scheduled appointment and click **Join Visit**.
   - Click the Action Center item for your video visit that says **Join Visit**.

   If someone else has already completed the join visit process for the video visit, you are placed in the waiting room without the need to complete the additional steps below. Your name and relationship to the patient is obtained from your FollowMyHealth account.

4. Follow any on-screen instructions to check your audio and video settings for the video visit as needed.
5. (Optional) Attach any files that are related to your condition that your provider needs to review.

   This option is displayed only if your provider has the attachments option enabled.

   You can attach files in either of the following ways.

   - Drag and drop files from a folder on your computer to **File Upload**.
   - Click **Click here to attach a file** to browse and select files from a folder on your computer.

   You can add up to five files in .JPG, .JPEG, or .PNG file formats. The maximum file size is 8 MB per file.

After a file is uploaded, a thumbnail is displayed.

All attachments are available to the provider during the visit and in Video Visit Reports after the visit.

6. Click **Next** to display your demographic information.

7. Confirm your phone number contact and preferred pharmacy information and make changes if necessary.

    Later, when the video visit starts and the video page opens, this information is shown in the visit **Summary** tab. Your healthcare provider can use this information to contact you if needed or send a prescription promptly after the video visit.

8. Click **Go to Virtual Waiting Room**.

    You are taken to the virtual waiting room and are an active patient in the provider's patient queue. The organization with which you are associated is shown.

    You can change your audio and video settings from the **Virtual Waiting Room**. Click **Change Audio/Video Settings** to review and change these settings if needed.

9. When the provider joins the video visit session (but before the provider actually starts video), the video visit screen opens.
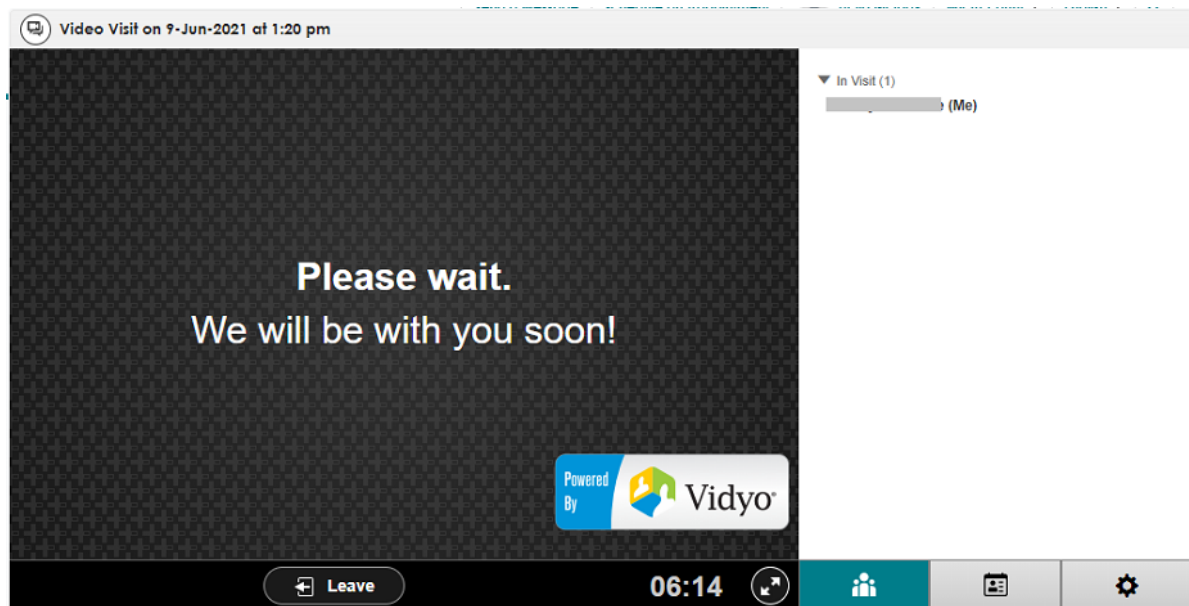
A message is displayed instructing you to wait for the session to start. To the right of the video screen is a tabbed section with the Participants tab () displayed by default. This tab shows the participants in the video session and their relationship to the patient. If others are invited to the visit and are in the waiting room, they are also displayed in the Participants tab when the provider admits them to the visit.

Additional tabs are available:

- The **Summary** tab ( ) shows the preferred pharmacy, preferred phone number, and links to any attachments added by the patient during the check-in process.

- The **Audio/Video Settings** tab ( ) shows the settings for the camera, microphone, and speakers. These settings can be adjusted as needed.

If you need to temporarily leave the video session, click **Leave** at the bottom. The video screen closes. To return to the video session, click **Rejoin Visit** in your **Upcoming** appointments.

10. The provider then starts the video visit.

    All participants who were in the waiting room are admitted to the visit automatically, and are listed in the Participants tab.

11. When the video session is over, the provider ends the visit.

    Your video session screen closes. Your appointment is moved from the **Upcoming** list to the **Past** appointments list.

12. (Optional) Plan your follow-up visit. If you requested that the provider send you a visit summary through email, check your **Messages** tab to view the visit summary.

Video visit screen overview

The patient's view of the video visit screen includes important information and functions that are used during a video visit.
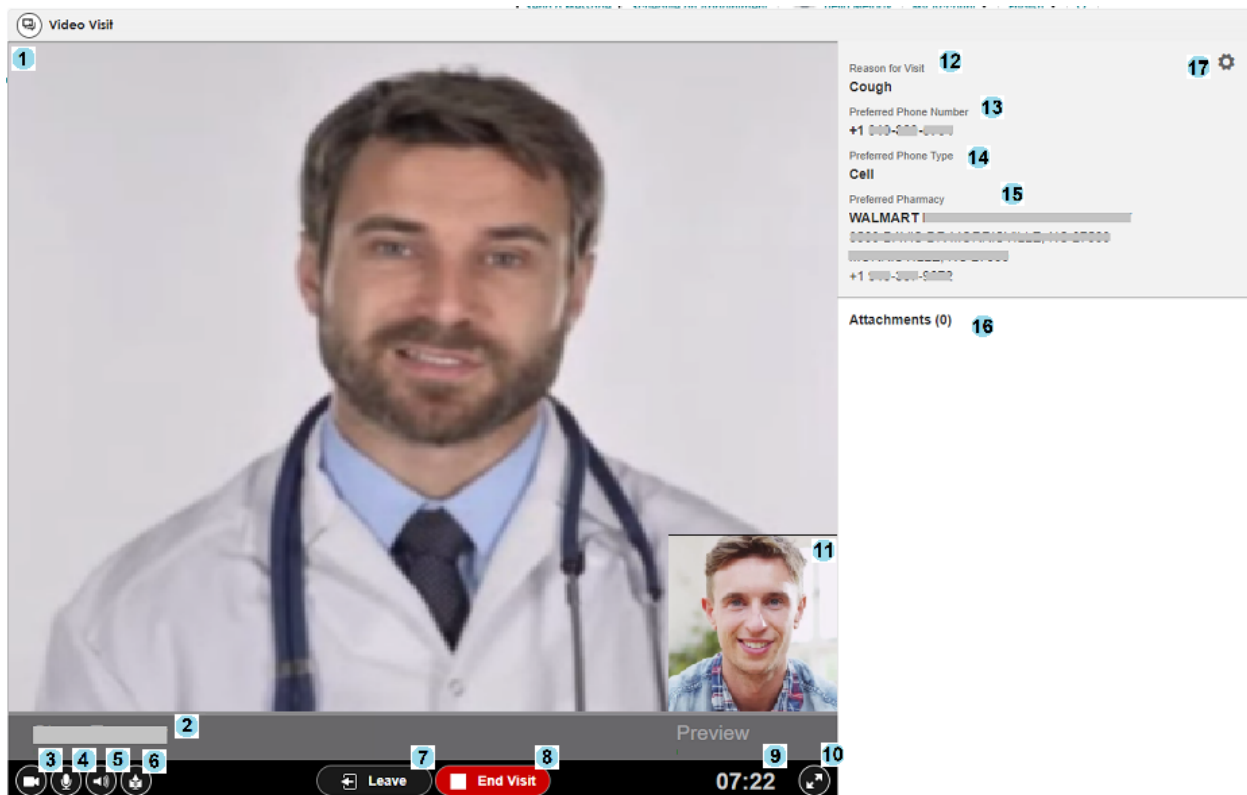
1. This is where the provider and other participants in the visit are shown.
    If the visit is between only two participants, such as the patient and provider, the provider is shown full screen. In visits containing three or more participants, all participants are shown at once.

2. This field contains the name of the displayed participant in the visit.
    Below the name is a green bar (not shown) that represents the volume level of the participant's audio output that rises and falls as the audio output increases and decreases in volume, respectively.

3. This button enables and disables broadcasting video from your webcam.
4. This button mutes and unmutes the audio from your audio input device (microphone).
5. This button mutes and unmutes the audio from the other participants' audio input devices (microphones).
6. This button is used to start and stop sharing your screen.

Due to differing capabilities across browsers, there are some caveats users should be aware of:

- **Apple Safari** cannot use screen sharing at this time.

  > **Note:** Applications must not be minimized in order to display as a choice for sharing.

7. This button is used to temporarily leave the visit. You can still rejoin the visit when this option is used.

8. This button is used to permanently end the visit. You cannot rejoin the visit when this option is used.

   > **Note:** This button is not available for scheduled video visits.

9. This field shows the duration of the video visit.

10. This button maximizes the video display by collapsing the details drawer shown to the right of the window.

11. This preview displays your video output from your webcam.
    Below `Preview` is a green bar (not shown) that represents the volume level of your audio output that rises and falls as the audio output increases and decreases in volume, respectively.

    This preview undocks from this location when there are more than three participants in the visit.

12. This field displays the **Reason for Visit** selected by you when you requested or scheduled the visit.
    Any additional information (not shown) that you provided when you requested the video visit is also displayed here, if available.

13. This field contains the phone number at which you prefer to be contacted.

14. This field indicates what kind of phone number your preferred phone number is, such as work, home, or mobile.

15. This is your selected preferred pharmacy for any prescriptions prescribed as a result of the visit.

16. This area contains links to any attachments that users can select to view during the video visit.

    > **Note:** For patients without a FollowMyHealth account, this feature is not available because they cannot add attachments.

17. This button brings up the **Audio and Video Settings** where users can configure the video and audio devices used in the visit.

Action Center video visit notifications

As you progress through a video visit, the **Action Center** on the **Home** page shows related notifications.

The notifications match the status of the video visit workflow.

Action Center notifications are available for the patient and other FollowMyHealth users so that you can click the notification to launch the video visit without manually switching accounts.

The following changes occur in **Action Center** as you progress through the video visit.

Checking in for the video visit

Video Visit with *Provider Name* **- Join Visit** is displayed in the Action Center.
When a scheduled video visit is ready for check-in (15 minutes before the appointment start time), this Action Center item is displayed. Click the action center item to complete the check-in workflow. The notification is not sent if the appointment is pending cancellation. This is the same action as clicking **Join Visit** in the **Upcoming** scheduled appointment.

Provider joined, but video not yet started

Video Visit with *Provider Name* **- Ready** is displayed in the Action Center.
When the provider has joined the visit but has not yet started the video, this action item is displayed. If you had checked in for the visit and had temporarily left the session before the provider started the video, you can click this action item to join the visit. This is the same action as clicking **Join Visit** in the **Upcoming** scheduled appointment.

Provider started video, video session in progress

Video Visit with *Provider Name* **- In Progress** is displayed in the Action Center.
After the provider has started the video visit and the video session is in progress, this action item is displayed. If you had temporarily left the video session while in progress, you can click this action item to rejoin the visit. This is the same action as clicking **Rejoin Visit** in the **Upcoming** scheduled appointment.

Notifications for scheduled video visits sent regardless of communication preferences

Text and email communications are always sent for scheduled video visits regardless of communication preferences that are configured in the practice management system, EHR application, or in FollowMyHealth. The link to join the visit is always sent to you so you can join. If you do not want these communications then do not schedule a video visit. As a best practice, you are notified when the visit is being scheduled or when you are being added as an invitee.

Chapter 10

Email visits

Use email visits to consult with your provider through secure email messaging. The email visit workflow includes answering questions to qualify your symptoms, identify the reason for the visit, and if needed, get a prescription from your provider.

The following are email visit requirements and features.

• You must have a connection with a provider that supports the email visit feature.

• If your provider supports attachments, you can attach images to the email visit.

• You can start an email visit from your FollowMyHealth Personal Health Record account in either of the following ways:

— From **My Account > Connections > With Providers and Healthcare Organizations > *Provider* > What do you want to do > Request an Email Visit**

— On the **Home** tab, from **Get Treated Now > Start an Email Visit**

• Your symptoms must be qualified during the email visit. If your symptoms are too severe, the email visit process stops and you are asked to see the provider at their office or seek emergency medical attention.

• A flat fee might be charged by your provider and is paid when requesting your email visit.

• All responses to your email visit are sent to the **Messages** tab in the FollowMyHealth Personal Health Record.
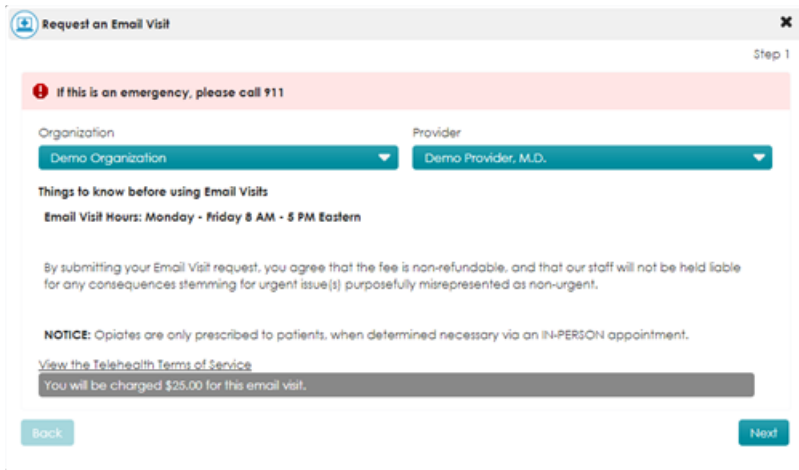
Request an email visit from the Home tab

Request an email visit from **Get Treated Now** on the **Home** tab of the FollowMyHealth® Personal Health Record. If the payment feature is enabled for your provider, you can also make a payment during this process.

1. Sign in to the FollowMyHealth Personal Health Record.
2. Go to **Get Treated Now** and click **Start an Email Visit**.
3. If you are connected to more than one organization that supports email visits, select the organization from the available list.
4. Select a provider from the available list.
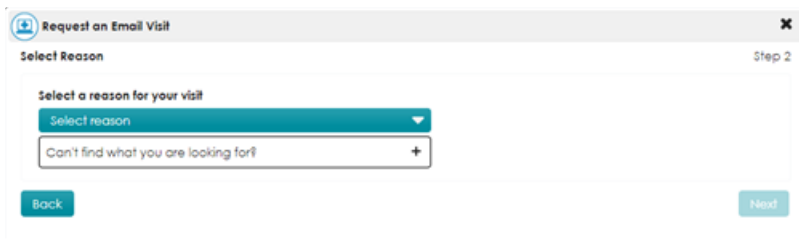
> **Note:** If your provider is not listed, they do not have the email visit feature enabled.

5. Click **Next**.
6. Read **Things to know before using Email Visits**.
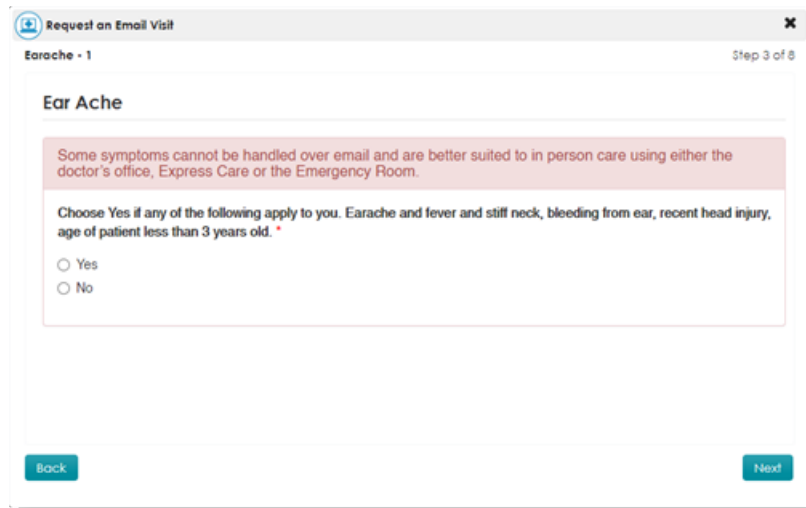
This is important information that your provider wants you know before you start.

7. Click **View the Telehealth Terms of Service** to read the terms of service.

    Click **Print** if you want a paper copy of the terms of service.

    Click **Close** after you have read the terms of service.

8. Click **Next**.
9. Select a reason for your visit from the available list.

If you do not see the symptoms that you are experiencing, you can click **Can't find what you are looking for > Make an In-Person Appointment**. The email visit workflow ends and **Schedule and Appointment** opens.

10. Click **Next**.

    The qualification process begins. The reason for the email visit is displayed at the top of the page.

11. Read the questions and click **Y** or **N** to reply.

If you have a symptom that is outside the guidelines for treatment through an email visit, a message is displayed.

Click **OK** to stop the email visit request workflow.

Otherwise, click **Next** to continue answering questions that are specific to your issue.

12. Answer the questions about your symptoms and click **Next**.

13. Enter any additional information that you want your provider to know and click **Next**.

14. (Optional) Attach files that are related to your condition that you want your provider to review.

> **Note:** This option is available only if your provider has the attachments option enabled.

You can attach files in either of the following ways.

• Drag and drop files from a folder on your computer into **File Upload**.

• Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to five files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

All attachments are made available to the provider for their reference.

15. Click **Next**.
16. Confirm your phone number contact and preferred pharmacy information and make changes if necessary.
17. Click **Next** or **Send**, depending on the following scenarios.

    Next is displayed in **Confirm Patient Information** if your provider has enabled the email visit payment feature. Otherwise, **Send** is displayed.

    • **Your provider does not have the payment feature enabled and you cannot make a payment at this time.**

       a.   Click **Send**.
            Summary is displayed.
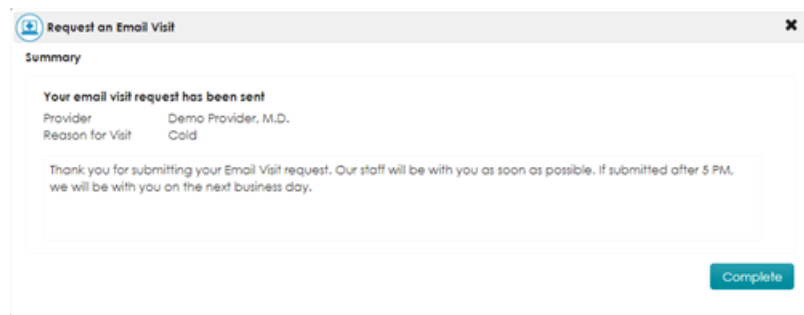
            A message indicates that your email visit is submitted to your provider.

       b.   Go to the next step to finish the email visit request.

    • **Your provider has the payment feature enabled and you can now make a payment.**

       a.   Click **Next**.
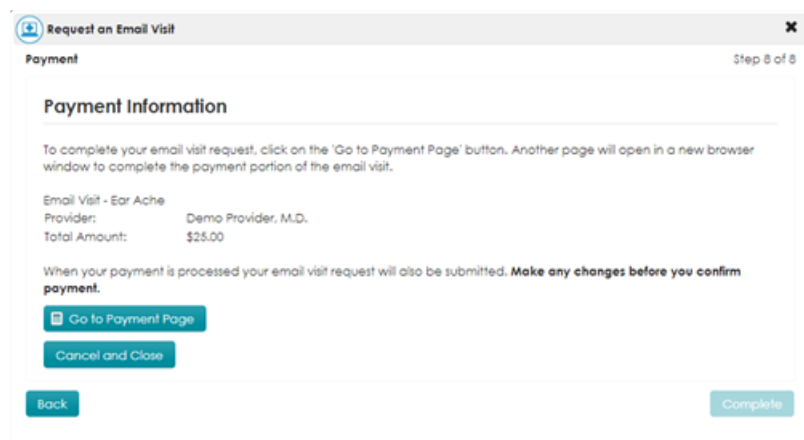
       b.   Click **Go to Payment Page**.

Order Summary

PO Number	YwCo53xORNcSvVxopbNQAHSCf
Total	$ 25.00

Card Number ●

Exp. Date ●   Card Code ●

Billing Address

First Name ●	Last Name ●
John	Doe

Billing Country ●	Zip ●
USA ▼	60001

Street Address ●	City ●
123 Main St.	Anytown

State ●	Phone Number
IL	1 312-555-0123

Email ●
email@example.com

[ ] I'm not a robot   reCAPTCHA
Privacy - Terms

    c.   Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.
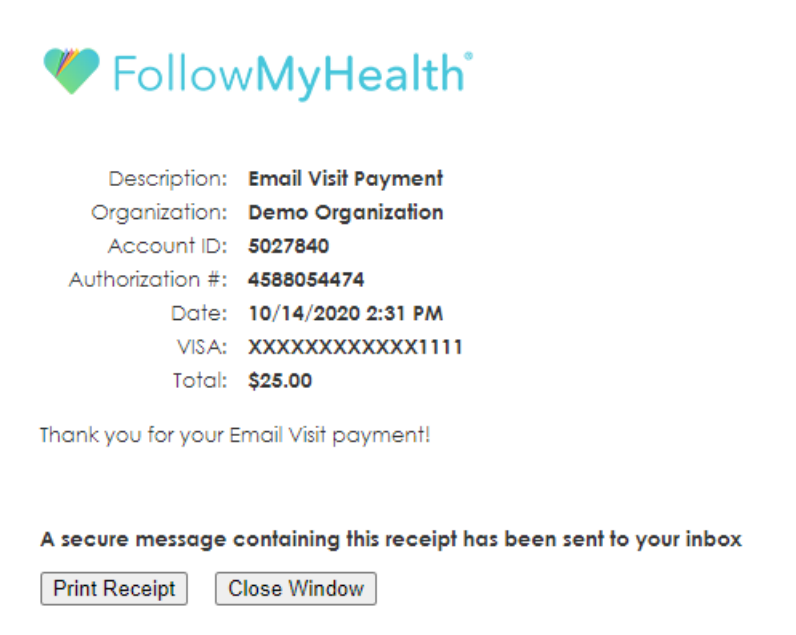
After your payment is processed, **Summary** is displayed.
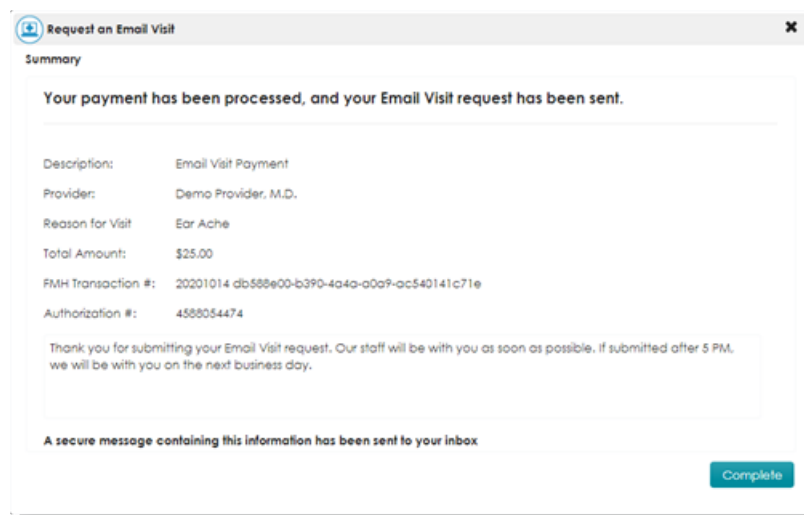
d. Go to the next step to finish the email visit request.

18. Click **Complete** to close the Email visit request workflow.

Results of this task

Your email visit request is sent to the provider. You can view the sent message from your **Sent** folder in the **Messages** tab. The message content is a summary of the email visit request.

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The provider receives the email visit request, reviews your symptoms, creates a care plan, and responds to the email visit request. The message is sent to your **Messages** tab, where you can retrieve your care plan. Your health record is also updated with the email visit information.
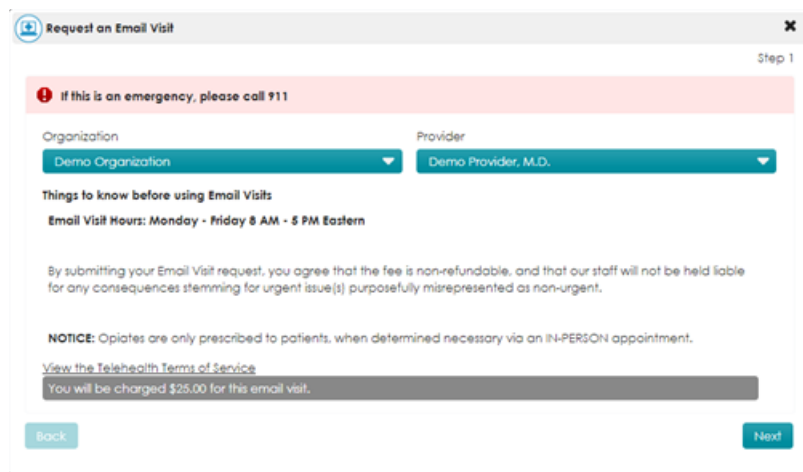
A receipt is also sent through an email message to your **Messages** tab.

Request an email visit from Connections

You can request an email visit from the provider connections list on your FollowMyHealth® Personal Health Record **Connections** tab. If the payment feature is enabled for your provider, you can also make a payment during this process.

1. Sign in to the FollowMyHealth Personal Health Record.
2. From the static toolbar, click **My Account > Connections**.
3. Expand **With Providers and Healthcare Organizations**.
4. Select a provider and click **What do you want to do > Request an Email Visit**.
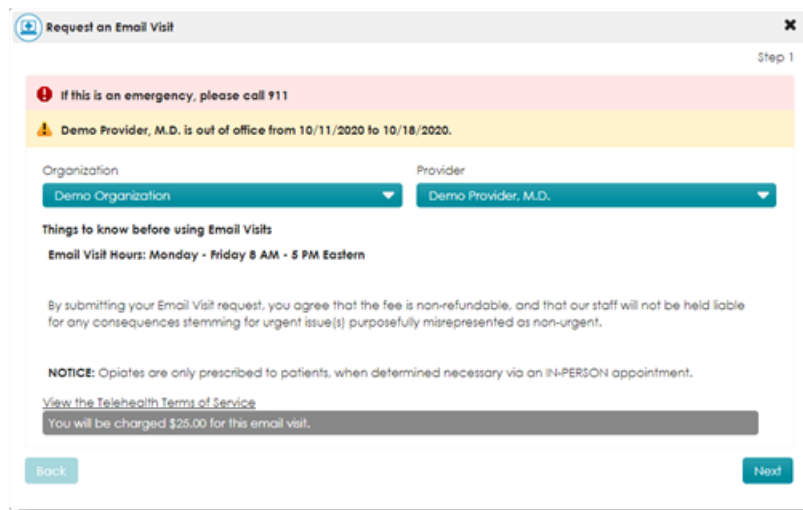
> **Note:** If your provider does not have **Request an Email Visit** listed, they do not have the email visit feature enabled.

The provider name is displayed in **Provider**.

If you request an email visit with a provider who is currently out of the office, the out-of-office banner is displayed in yellow below the warning message. Even though the provider is out of the office, you can continue with the email visit request.

5. Read **Things to know before using Email Visits**.

   This is important information that your provider wants you know before you start.

6. Click **View the Telehealth Terms of Service** to read the terms of service.

   Click **Print** if you want a paper copy of the terms of service.

   Click **Close** after you have read the terms of service.

7. Click **Next**.

8. Select a reason for your visit from the available list.
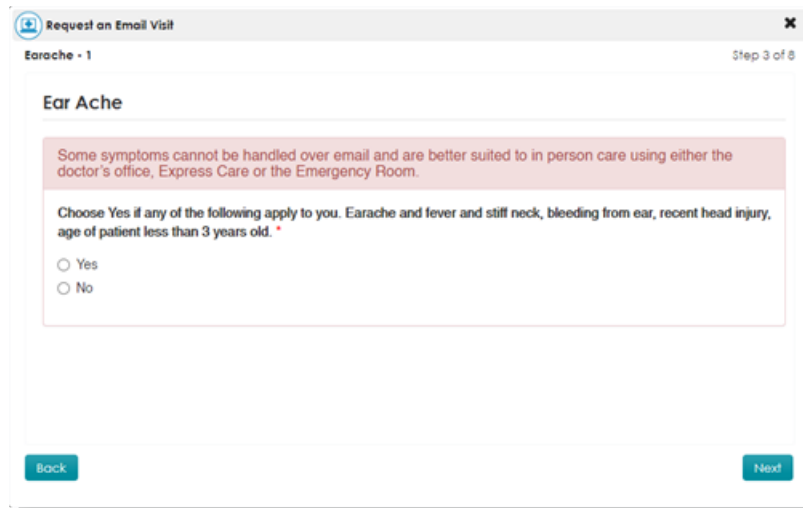
   If you do not see the symptoms that you are experiencing, you can click **Can't find what you are looking for > Make an In-Person Appointment**. The Email visit workflow ends and **Schedule and Appointment** opens.

9. Click **Next**.

   The qualification process begins. The reason for the Email visit is displayed at the top of the page.

10. Read the questions and click **Y** or **N** to reply.

If you have a symptom that is outside the guidelines for treatment through an email visit, a message is displayed.

Click **OK** to stop the email visit request workflow.

Otherwise, click **Next** to continue answering questions that are specific to your issue.

11. Answer the questions about your symptoms and click **Next**.

12. Enter any additional information that you want your provider to know and click **Next**.

13. (Optional) Attach files that are related to your condition that you want your provider to review.

> **Note:** This option is available only if your provider has the attachments option enabled.

You can attach files in either of the following ways.

• Drag and drop files from a folder on your computer into **File Upload**.

• Click **Click here to attach a file** to browse and select files from a folder on your computer.

You can add up to five files in `JPG`, `JPEG`, or `PNG` file format. The maximum file size is 8MB.

After a file is uploaded, it is displayed with a thumbnail view on **Other Information**.

All attachments are made available to the provider for their reference.

14. Click **Next**.
15. Confirm your phone number contact and preferred pharmacy information and make changes if necessary.
16. Click **Next** or **Send**, depending on the following scenarios.

    Next is displayed in **Confirm Patient Information** if your provider has enabled the email visit payment feature. Otherwise **Send** is displayed.

    • **Your provider does not have the payment feature enabled and you cannot make a payment at this time.**

       a. Click **Send**.
          Summary is displayed.

          A message is displayed that indicates that your email visit is submitted to your provider.

       b. Go to the next step to finish the email visit request.

    • **Your provider has the payment feature enabled and you can now make a payment.**

       a. Click **Next**.
          Payment is displayed.

b. Click **Go to Payment Page**.

c. Enter your credit card or bank account information and click **Pay Now**. A payment receipt is displayed.

FollowMyHealth®

Description: **Email Visit Payment**
Organization: **Demo Organization**
Account ID: **5027840**
Authorization #: **4588054474**
Date: **10/14/2020 2:31 PM**
VISA: **XXXXXXXXXXX1111**
Total: **$25.00**

Thank you for your Email Visit payment!

A secure message containing this receipt has been sent to your inbox

Print Receipt   Close Window

After your payment is processed, **Summary** is displayed.

Request an Email Visit

Summary

Your payment has been processed, and your Email Visit request has been sent.

Description:	Email Visit Payment
Provider:	Demo Provider, M.D.
Reason for Visit	Ear Ache
Total Amount:	$25.00
FMH Transaction #:	20201014 db588e00-b390-4a4a-a0a9-ac540141c71e
Authorization #:	4588054474

Thank you for submitting your Email Visit request. Our staff will be with you as soon as possible. If submitted after 5 PM, we will be with you on the next business day.

A secure message containing this information has been sent to your inbox

Complete

    d.   Go to the next step to finish the Email visit request.

17. Click **Complete** to close the email visit request workflow.

Results of this task

Your email visit request is sent to the provider. You can view the sent message from your **Sent** folder in the **Messages** tab. The message content is a summary of the email visit request.

The provider receives the email visit request, reviews your symptoms, creates a care plan, and responds to the email visit request. The message is sent to your **Messages** tab and you can retrieve your care plan. Your health record is also updated with the email visit information.

A receipt is also sent through an email message to your **Messages** tab.

Appendix A

Activity History log entries

The following table summarizes entries that you might find in your Activity History log under **My Account > Preferences**.

Activity	When Logged
Alternative Sign In Method Added	When an alternate sign in method is added to the patient account in the FMH Personal Health Record under **My Account > Preferences > Sign In Preferences**.
Alternative Sign In Method Removed	When an alternate sign in method is removed from the patient account in the FMH Personal Health Record under **My Account > Preferences > Sign In Preferences**.
Clinical Document Downloaded	When a clinical document is downloaded from a patient's account under **My Health > Summary > Send > Export** when the patient selects **Download to this computer or an external storage device**. The user who did it (patient or authorized representative), and the date and time of the event is logged.
Clinical Document Emailed	When a clinical document is emailed from a patient's account under **My Health > Summary > Send > Export** when the patient selects **Transmit via email**. The user who did it (patient or authorized representative), the date and time of the event and the email address to which it was sent is logged.
Disabled Emails About 3rd Parties	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they uncheck the **Email and/or Mail** checkbox under "Notifications About 3rd Party Partners" in **My Account > Preferences > Communication Preferences**.
Disabled Emails About FollowMyHealth	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they uncheck the **Email** checkbox under "Notifications About FollowMyHealth" in **My Account > Preferences > Communication Preferences**.
Disabled Text Messages About 3rd Parties	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they uncheck the **Text Message** checkbox under "Notifications About 3rd Party Partners" in **My Account > Preferences > Communication Preferences**.

Activity	When Logged
Disabled Text Messages About FollowMyHealth	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they uncheck the **Text Message** checkbox under "Notifications About FollowMyHealth" in **My Account > Preferences > Communication Preferences**.
EHI Export File Deleted	When a patient or authorized individual (with Full Access) deletes a generated EHI Export file in the FMH Personal Health Record. The activity history log entry includes the date and time the EHI Export was manually deleted by the patient or their authorized individual, the first and last name of the patient or authorized individual (with Full Access) who deleted the file, and the event Type (EHI Export File Deleted).
EHI Export File Downloaded	When a patient (or authorized individual with Full Access) has generated an EHI Export file with the patient's data in the last 48 hours (**My Health > Summary > Send > Export All My Data**) and clicks the **Download EHI Export File** link from within the "Export FollowMyHealth Data" window. The activity history log entry includes the date and time the file is downloaded, the first and last names of the patient or authorized individual (with Full Access) performing the download (authorized individuals with Read Only access cannot perform this function), and the event Type (EHI Export File Downloaded).
EHI Export File Initiated	When a patient or authorized individual (with Full Access) kicks off the EHI Export process from the FMH Personal Health Record. The activity history log entry includes the date and time the EHI Export was initiated, the user name of the patient or authorized individual (with Full Access) performing the EHI Export (authorized individuals with Read Only access cannot perform this function), and the event Type (EHI Export File Initiated).
Email Changed	When patients with a verified email address in their account change their contact information to a new email address from any of the following places: • **My Account > My Info** • **My Account > Preferences > Communication Preferences** • **My Account > Preferences > Sign In Preferences > Two-factor Authentication** The details section contains the new email address.

Activity	When Logged
Email Verified	When patients with an unverified email address in their account complete the steps to verify their email address. The details includes the verified email address.
Enabled Emails About 3rd Parties	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they check the **Email and/or Mail** checkbox under "Notifications About 3rd Party Partners" in **My Account > Preferences > Communication Preferences**.
Enabled Emails About FollowMyHealth	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they check the **Email** checkbox under "Notifications About FollowMyHealth" in **My Account > Preferences > Communication Preferences**.
Enabled Text Messages About 3rd Parties	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they check the **Text Message** checkbox under "Notifications About 3rd Party Partners" in **My Account > Preferences > Communication Preferences**.
Enabled Text Messages About FollowMyHealth	When patients save the **Communication Preferences** screen during the Re-accept Terms of Use workflow, or when they check the **Text Message** checkbox under "Notifications About FollowMyHealth" in **My Account > Preferences > Communication Preferences**.
FMH Sign In Account Added	When a patient adds an "FMH Secure Sign In" login method to their account, either through the user name recovery workflow or from **My Account > Preferences > Sign In Preferences**.
Health Record Item Added	Whenever a patient-entered clinical item is added to the patient's record. This is also logged for form submissions with an autofill component that triggers this change to the patient's record. If this action was done by an authorized individual, including if the form was submitted by the authorized individual, the user name listed for the activity history log in the patient's account must have the authorized individual's name. The **Details** column lists the name of the clinical item that was added.

Activity	When Logged
Health Record Item Deleted	Whenever any clinical item is removed from the patient's record, regardless of source. This is also logged for form submissions with an autofill component that triggers this change to the patient's record. If this action was done by an authorized individual, including if the form was submitted by the authorized individual, the user name listed for the activity history log in the patient's account must have the authorized individual's name. The **Details** column lists the name of the clinical item that was deleted.
Health Record Item Updated	Whenever an existing patient-entered clinical item is updated. This is also logged for form submissions with an autofill component that triggers this change to the patient's record. If this action was done by an authorized individual, including if the form was submitted by the authorized individual, the user name listed for the activity history log in the patient's account must have the authorized individual's name. The **Details** column lists the name of the clinical item that was updated.
Invalid Sign In Attempt	Whenever there is an invalid login attempt against a valid username from either the Web browser login page or the Mobile browser login page.
Mobile Phone Added	When FMH users who do not have a verified mobile phone number add their mobile phone number to their account from **My Account > Preferences > Communication Preferences** or the Action Center. The mobile phone number that was added is shown in the details.
Mobile Phone Changed	When FMH users with a verified mobile phone change their mobile phone number in **My Account > My Info** or **My Account > Preferences > Communication Preferences**.
Mobile Phone Removed	When a FMH user with a verified mobile phone number removes their phone number in **My Account > My Info** or **My Account > Preferences > Communication Preferences**.
Organization Single Sign-On Removed	When users view which healthcare organization sites for which they enabled inbound SSO, and remove a connection from within their FollowMyHealth account.
Password Changed	When a patient changes their sign in password.
Password Reset Max Verification Code Attempts	When a user reaches the maximum number of verification code attempts during the password reset flow, either invalid entries or resend requests, from the patient portal sign in page.

Activity	When Logged
Password Reset Request	When a user requests a password reset for a valid username from either the Web browser login page or Mobile browser login page.
Password Reset Verification Code Invalid	When an invalid verification code is entered by the user when attempting to reset their password from the patient portal sign in page.
Password Reset Verification Code Sent	When a verification code is sent to a user for resetting their password from the patient portal sign in page. This is also logged when the user asks for a new code via the "resend" option. The details includes where the code was sent (the email associated to the username).
Patient Account Locked	When a patient's account becomes locked due to too many failed login attempts with an incorrect password. **Note:** While an account is locked, a sign-in attempt with the correct username and password is treated as an invalid sign-in attempt.
Third-Party App Authorized	Logged if the patient accepts on the data sharing permissions page (grants permission from the page granting access to their FMH data with a 3rd party app or if they grant access to share their connected EHR data through the MU flow)
Third-Party App Removed	Logged if the patient revokes from their account after access has been granted. **Note:** We do not log when a patient declines access to their data.
Third-Party App Requested Data	Logged when the third-party app gets a new authorization token.
Two-factor Authentication Disabled	When a user has two-factor authentication enabled and currently set to something other than **None**, and they change their preference under **My Account > Preferences > Sign In Preferences** by clicking the **Two-factor Authentication** row and selecting **None** from the drop-down menu to disable two-factor authentication;
Two-factor Authentication Set to App	When a user changes their FMH account two-factor authentication method to App.
Two-factor Authentication Set to Email	When a user changes their FMH account two-factor authentication method to Email. The email address at the time the change is saved is shown.
Two-factor Authentication Set to Text Message	When a user changes their FMH account two-factor authentication method to Text Message. The mobile phone number at the time the change is saved is shown.

Activity	When Logged
Two-factor Max Verification Code Attempts	When the maximum verification code attempts limit is reached during the two-factor authentication process.
Two-factor Verification Code Invalid	Whenever a user enters an invalid verification code in the two-factor authentication part of the login process.
Two-factor Verification Code Sent	Whenever a verification code is sent to a user for two-factor authentication or they request a new one via "resend" option. The details includes where the code was sent, either the email address or mobile phone on the user's account.
Username Changed	If a user successfully changes their username
Username Recovered	If a user successfully recovers their username
Username Recovery Max Verification Code Attempts	When a user reaches the maximum number of verification code attempts when trying to recover their username.
Username Recovery Verification Code Invalid	Whenever a user enters an invalid verification code in the username recovery process.
Username Recovery Verification Code Sent	Whenever a verification code is sent to the user for security purposes. The details includes where the code was sent to, either the patient's email address or phone number.

For more information

For more information and the most up-to-date documentation, go to the Client Portal website at **https://central.allscripts.com**. You can access the Product Documentation portal from this website.

1. Sign in to the Client Portal website.

   - If you have a Client Portal account, enter your user name and password, and click **Sign in**.
   - If you do not have a Client Portal account, click **Create one** to begin creating a new account.

   The Client Portal home page is displayed.

2. Go to **Product Documentation > Search Documentation**.
3. On the Product Documentation portal landing page use the search field and filters to find your document, or click a product tile, and then a version tile to display all the documents for that product version.

   a) From **Filters**, select the product or document type on which to search for documentation.
   b) In the search field, enter search criteria.

      The search field uses predictive searching. As you type, topics that match the criteria are displayed below the search field.

4. To complete your search, perform one of the following actions:

   - Click the magnifying glass.
   - Select one of the topics displayed beneath the search field.

   Search results are displayed in the main pane. You can use the filters under refine results to further narrow your results. For example, you can select **Feature Guides** from **Document Type** to display only topics that are included in a feature guide.

5. Click a topic title to open the topic in the context of the book indicated by the product, version, and document type tags that are displayed beneath the title.

   > **Note:** If a topic is included in more than one book, a list of the books in which the topic is included is displayed beneath the label **Also available in**. Select the applicable book from the list. The topic opens in the context of that specific publication.

What to do next

You can navigate the Product Documentation portal using multiple methods. From the top of the portal landing page, click **Getting Started** to learn more about using the portal.

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