MENDEM HEALTH

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Patient Experience: Patient Portal

For further assistance

Website: www.mendemhealth.com

Phone: 240-630-5767

Patient Experience: Patient Portal

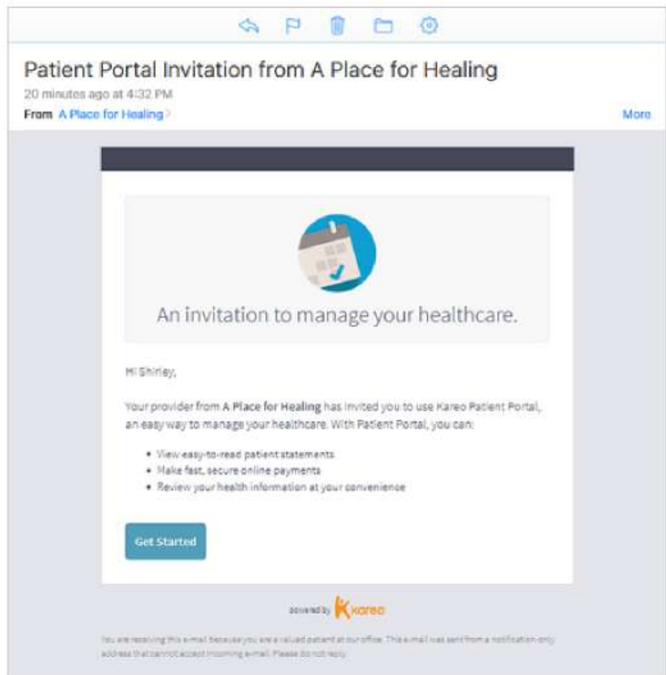
The *Patient Portal* is an easy way for patients to view their health record online. Patients can review their problems, allergies, medications, eLab results, vitals, shared treatment plans, and make an online payment. They can also message their providers and authorize access for a guest to view their account.

Scheduling: Go to www.mendemhealth.com to book all appointments.

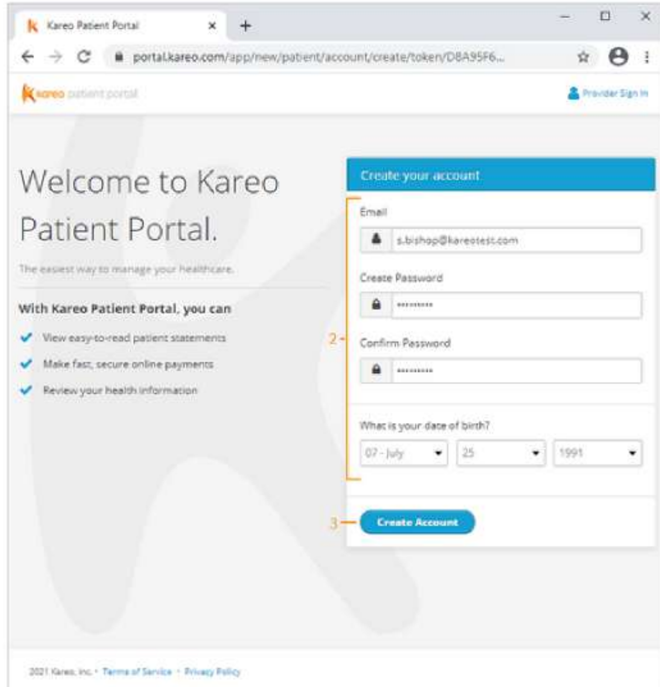
Activate Patient Portal

After the practice invites the patient to the *Patient Portal,* the patient receives an email invitation to activate their account.

1. In the email invitation, the patient clicks Get Started. The *Patient Portal* create account page opens.



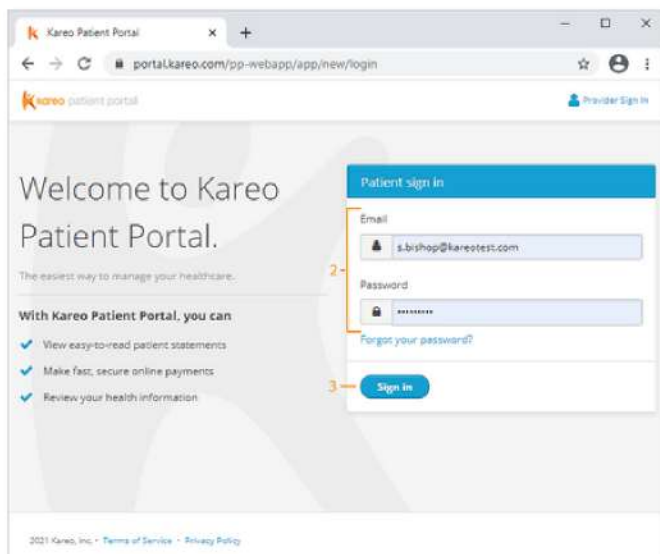
2. The patient creates a *Password* and enters their *Date of Birth*.
   Note: The *Email* is auto-populated from the email invitation.
3. Patient clicks Create Account. The account is created and the *Patient Portal* dashboard opens.



Access Patient Portal

After the account is activated, patients can log into the *Patient Portal anytime* through their mobile device or computer.

1. The patient opens portal.kareo.com in a web browser. The *Patient Portal* page opens.
2. Patient enters their *Email* and *Password*.
3. Patient clicks Sign in. The *Dashboard* opens.



Navigate Dashboard

a. *Top Menu:* Click to access the Dashboard, *Health Records*, *Documents*, *Messages*, *Payments,* or *Itemized Receipt*. Click on the patient *Name*to access *My Account* or to log out.

b. *Health Records:* Click View Health Records to review health information such as eLab results, vitals, medications, problems, and allergies.

c. *Documents:* Click View Documents to review shared documents such as treatment plans or patient education. A notification displays when a treatment plan signature is requested by the provider.

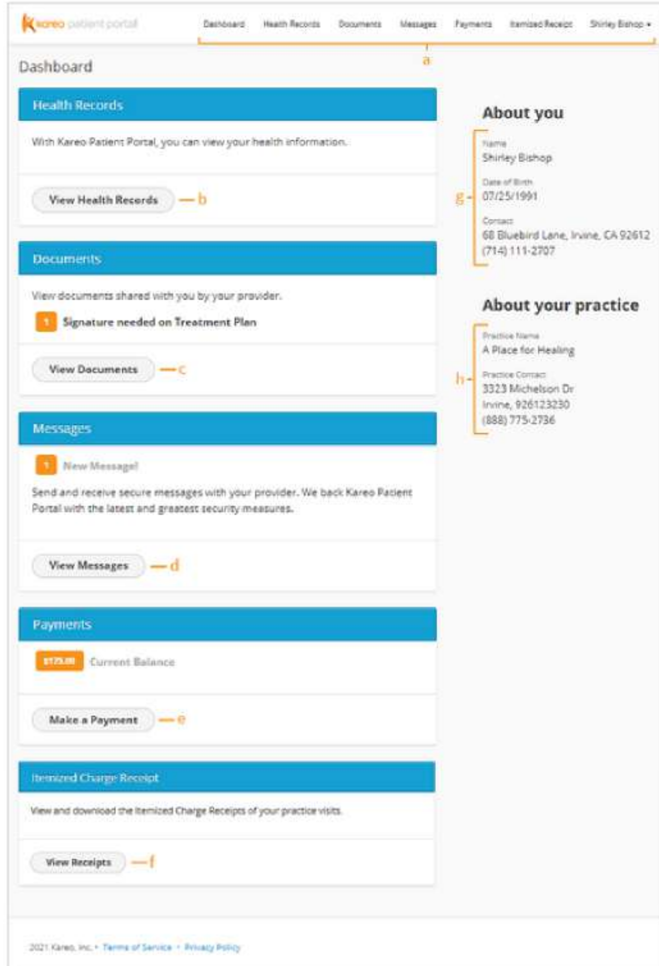
d. *Messages:* Click View Messages to send and receive messages securely with the provider. A notification displays when a new message is received.

e. *Payments:* If applicable, click to make an online payment, view the bill or view the previous portal payments.

f. *Itemized Charge Receipt:* If applicable, click to view and download itemized receipts for their visits.
Note: Practice must enable the Receipt on Patient Portal setting, for patients to access this section.

g. *About you:* Patient details on file with the practice.

h. *About your practice:* The practice address and contact information.



Navigate Health Records

a. *Actions:* Click to view, download, send by direct message, or email the summary of care.

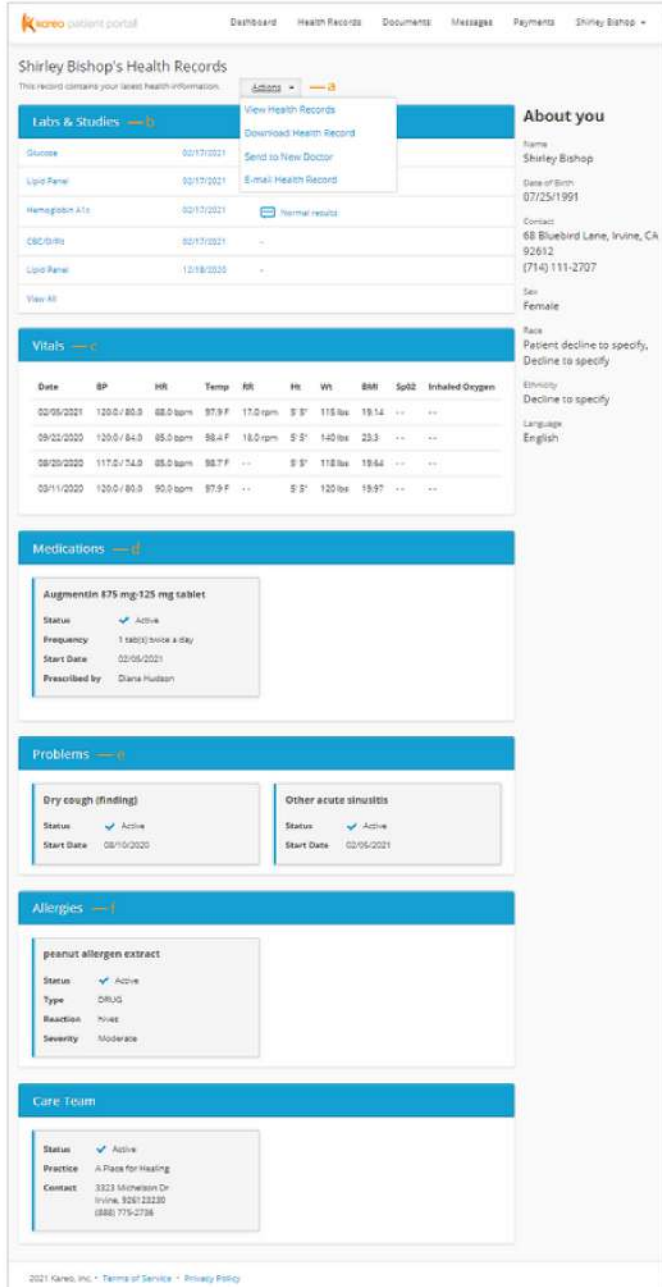
b. *Labs & Studies:* Displays recent Lab orders and applicable notes. Click View All to display all labs. Click on the lab to view results and the provider comments.

c. *Vitals:* Displays recorded vitals.

d. *Medications:* Displays active medications.

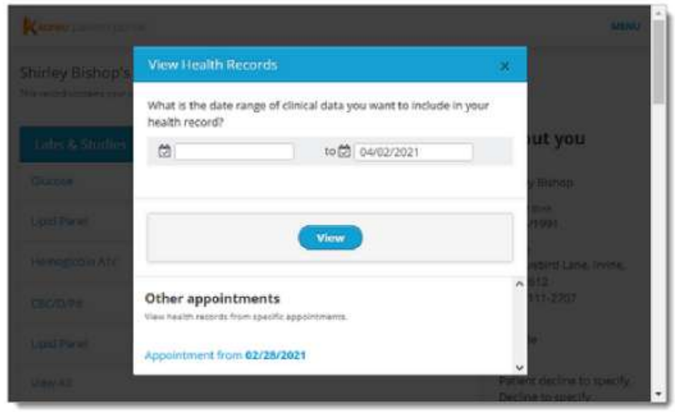
e. *Problems: Displays active* problems.

f. *Allergies: Displays active* allergies.



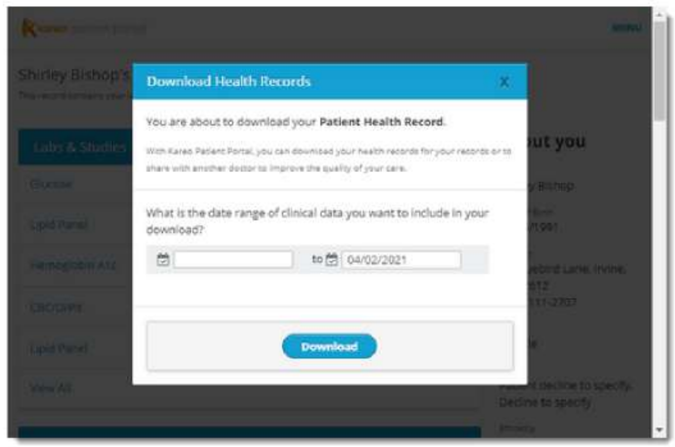
View Health Record

1. Click Action and select *View Health Record*. The *View Health Records* pop-up window opens.
2. View all health records or by specific appointments:
   •To view all health records, select the date range. Then, click View. The summary of care opens in a new browser.
   •To view health records from specific appointments, click the Appointment Date. The summary of care opens in a new browser.



Download Health Record

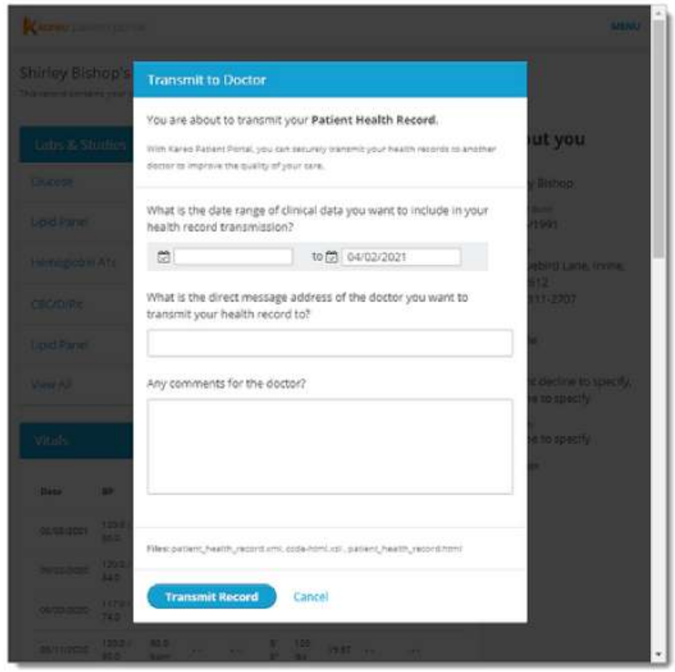
1. Click Action and select *Download Health Record*. The *Download Health Records* pop-up window opens.
2. Select the date range.
3. Click Download. A zip file is saved containing the XML files.



Send to New Doctor

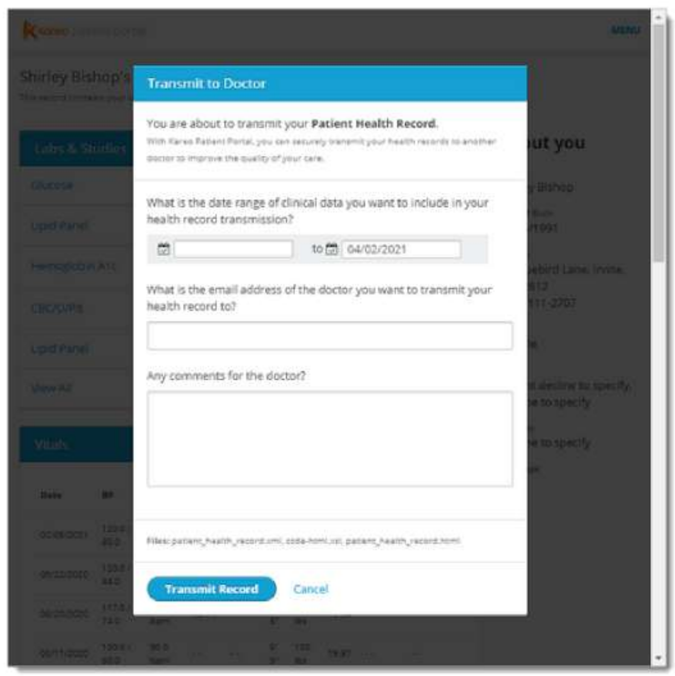
Patients must have the provider's direct message address to use this feature.

1. Click Action and select *Send to New Doctor*. The *Transmit to Doctor*pop-up window opens.
2. Select the date range.
3. Enter the provider's direct message address and optionally add comments.
4. ClickTransmit Record when finished.



E-mail Health Record

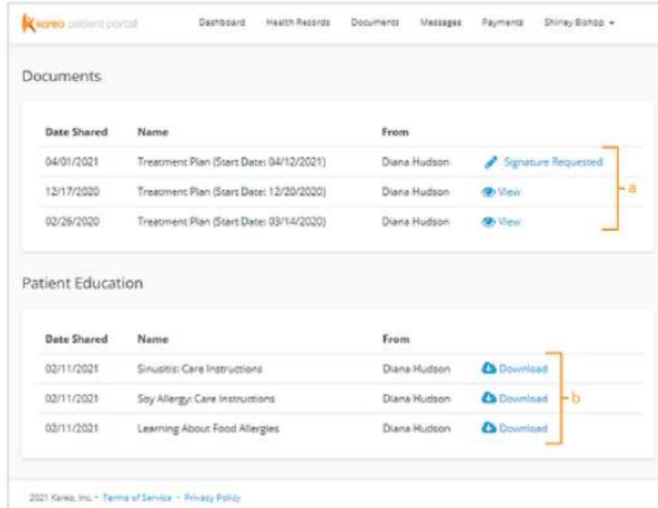
1. Click Action and select *E-Mail Health Record*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's email address and optionally add comments.
4. ClickTransmit Record when finished.



Navigate Documents

a. *Documents:* Displays treatment plans that requires a signature by the patient and shared treatment plans. Click to view details and optionally download.

b. *Patient Education:* Displays sent patient educations. Click Download to save the file.

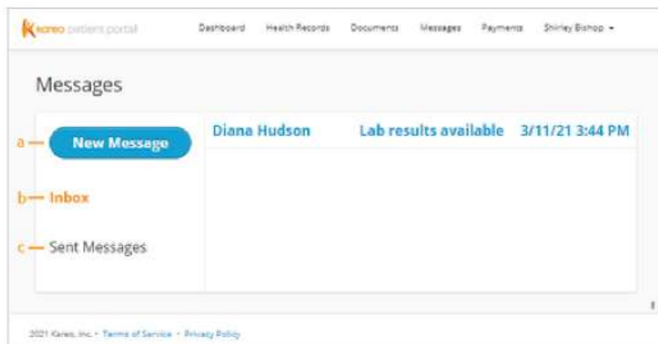


Navigate Messages

a. *New Message:* Send new secure message to the provider.

b. *Inbox:*Displays messages sent by the provider.

c. *Sent Messages:* Displays message sent to the provider.



Send New Message

1. Click New Message. The *New Message* page opens.

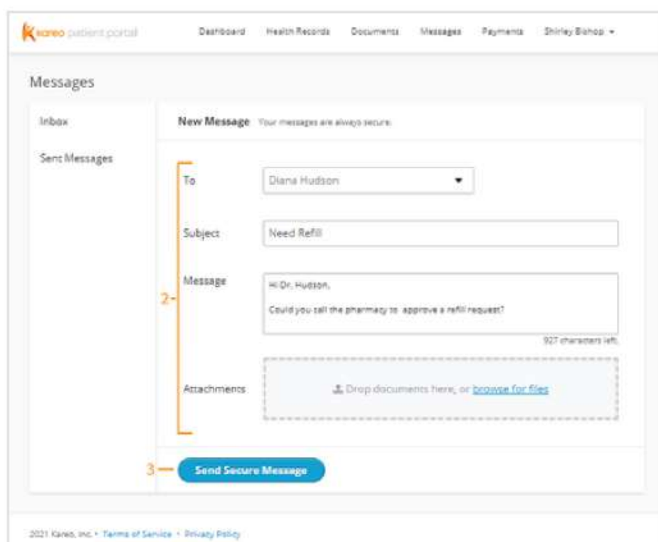
2.*Compose message:*

a.Select a provider from the *To* drop-down.

b. Enter the *Subject* and *Message* to the provider.

c. Optionally, attach an image or document (not to exceed 10MB).

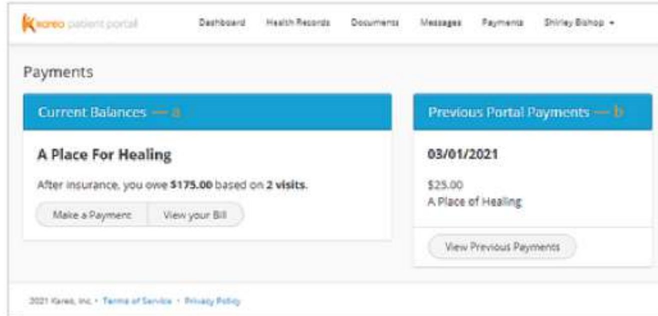
3. Click Send Secure Message when finished. The message display in the provider's Message Center.



Navigate Payments

a.*Current Balance:* Displays the current patient balance. Click Make a Payment to pay the balance online or click View your Bill to see the breakdown of the bill or print the statement.

b.*Previous Portal Payments:* Displays previous payments made through the *Patient Portal*. Click View previous payments to see additional payments.



View Bill

a. Click View your Bill. The *Your Bill Details* page opens.

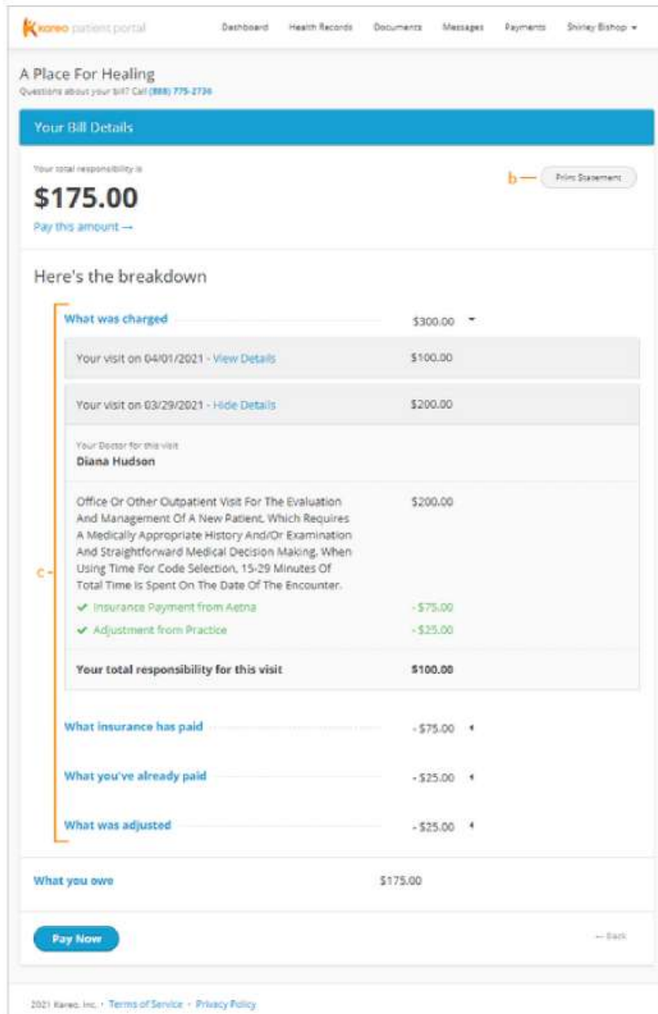
b. *Print Statement:* Click to print the details of the page.

c. Review the breakdown:

•ClickView Details to display which code(s) was billed for the specific visit and the breakdown of applicable insurance payments and adjustments.

•Review total insurance payment, patient payment, and adjustments.

d. *Payment:* Review the patient balance. Click Pay this amount at the top of the page or Pay Now at the bottom of the page to make a payment.



Make Payment

1. Click Make a Payment. The *Make a Payment* page opens.
2. The patient clicks to select the payment amount to pay.
   Note: The patient can click I want to see my statement before I pay to view their statement first.

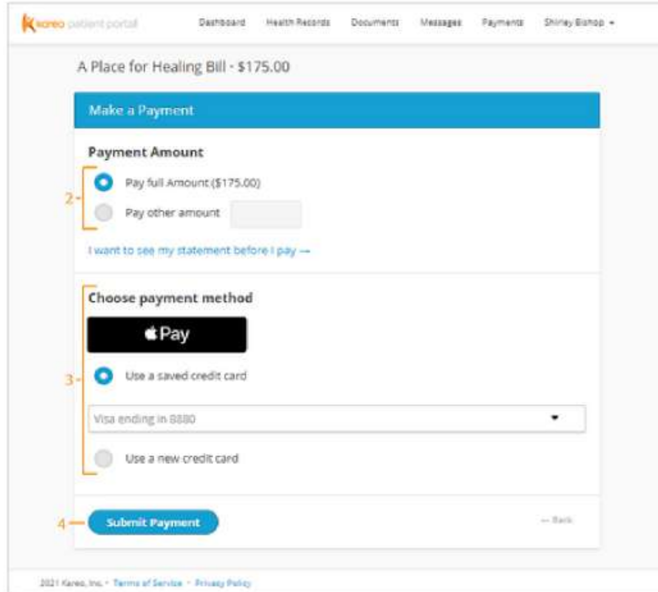
   •"Pay full Amount" to pay the total amount owed.

   •"Pay other amount" to enter a different payment amount.
3. *Payment Method:*

   •If the patient has Apple Pay, Google Pay, or Microsoft Pay set up, click the icon to process the payment.

   •To use a saved patient payment card, select "Use a saved credit card". If there are multiple cards on file, click the drop-down to select the desired card.

   •To manually enter a new card, select "Use a new credit card". Then, populate the *Name on Card, Card Number, Expiration Date,* and three-digit *CVV* code.
4. ClickSubmit Payment. The*Payment Successful* page opens with a receipt and the option to print.



Navigate Itemized Charge Receipt

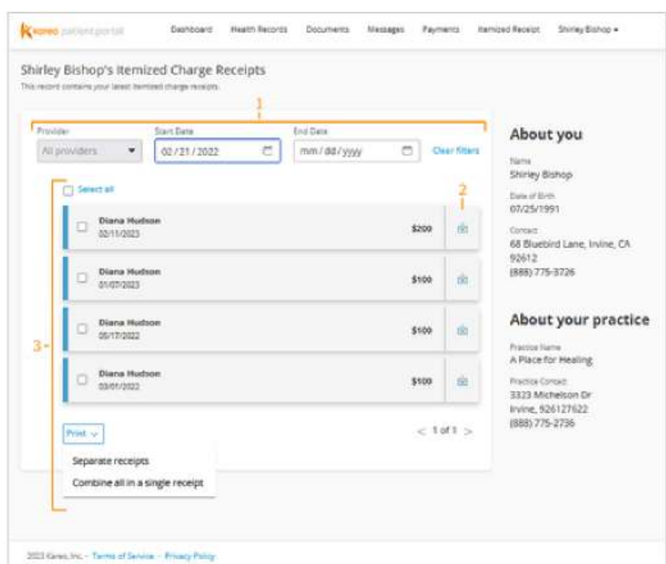
Practice must enable the Receipt on Patient Portal setting, for patients to access this section.

1. *Filter:* By default, all receipts from the last year to current date displays. To change the filters, click the*Provider*,*Start Date, or End Date*drop-down.

•To reset the filters, click Clear filters.

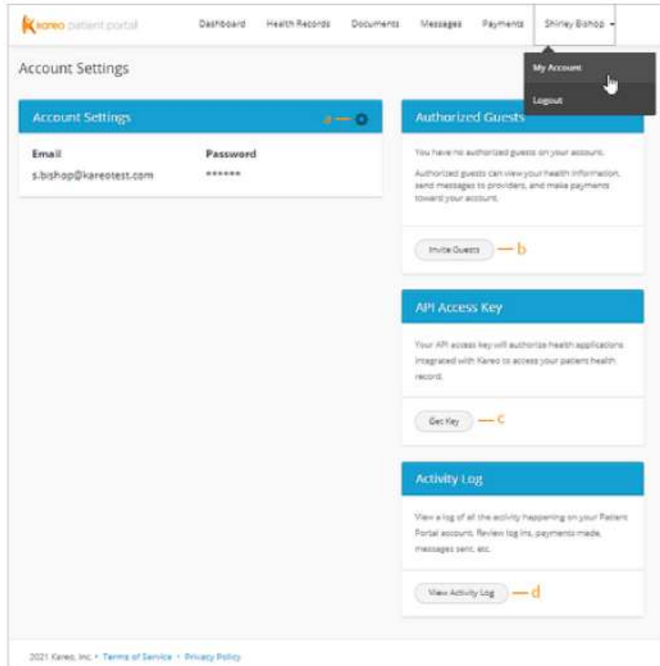
2.*Download:* Click the download icon on a listed visit to generate a PDF of the itemized receipt.

3.*Print:* Use the "Select all" master checkbox or click to select specific visits. Then, click to expand the *Print* options and select to generate a PDF with separately itemized receipts for each visit or to combine all visits in a single itemized receipt when



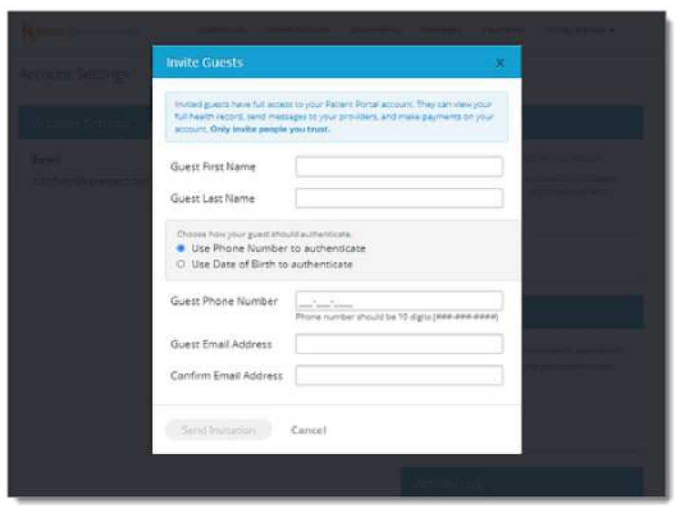
applicable.
Note: Only visits for the same practice and service location can be combined in a single receipt.

Navigate My Account



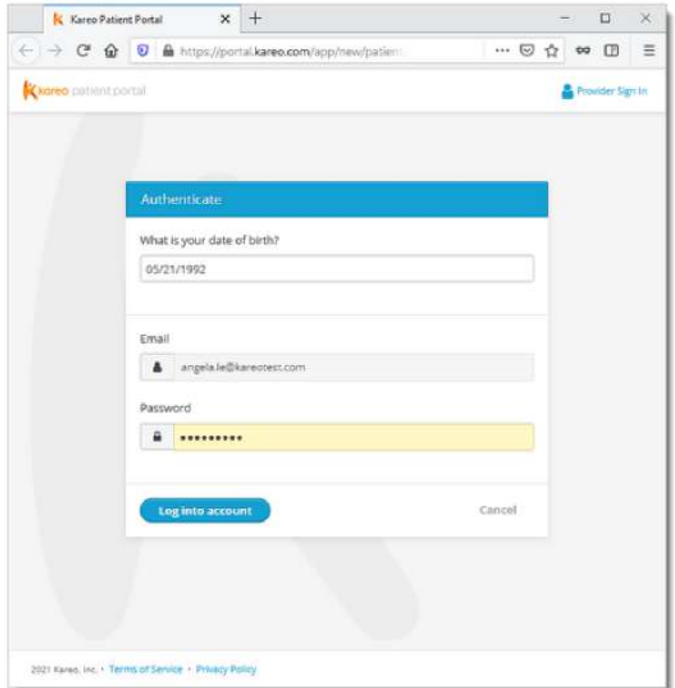
a. *Account Settings:* Displays the email address associated with the account. Click the settings icon to reset the password.
b. *Authorized Guests:* Click Invite Gueststo allow authorized users to view the patient's health information, send messages, and make payments. To deny access to an authorized guest, click Revokenext to the guest's name.
Note: Authorized users do not have access to the *Account Settings* or *Authorized Guests* sections.
c. *API Access Key:*ClickGet Keyto generate the API access key that authorizes health applications to integrate with Tebra to access the patient's health record. To deny the generated API key, click Revoke. Then, click Revoke Access on the confirmation pop-up window.
d. *Activity Log:* Click View Activity Log to review log ins, payments made, messages sent, and more.

Invite Guests



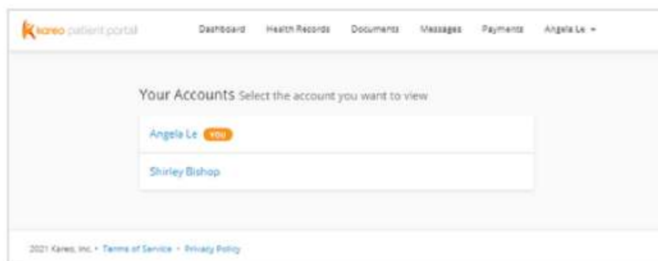
1. ClickInvite Guests. The *Invite Guest* pop-up window opens.
2. Enter the *Guest First* and *Last Name*.
3. Select how the guest authenticates.
4. Enter the *Guest Phone Number* or *Date of Birth* and *Email Address*.
5. Click Send Invitation. The confirmation pop-up window opens and an email invitation is sent to the invited guest.
6. Continue to add additional guests or click I'm done to close the pop-window.

Invited Guest: Authenticate and Access Account



1. The guest receives an email invitation and click Get Started. The *Authenticate* page opens in a new browser.
2. The guest enters their phone number or date of birth for authentication and clicks Log into account. The *Your Accounts* page opens.

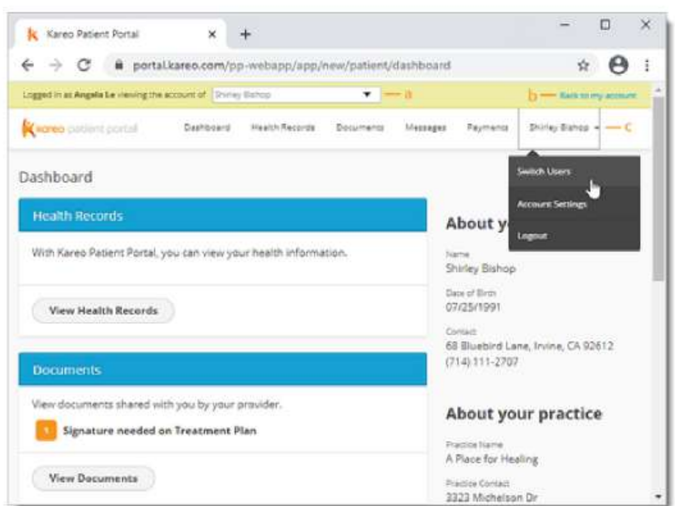
   •If the guest does not have a *Patient Portal* account, create a password. Then, click Create Account. The *Your Accounts page* opens.



3. Select an account to view.

   •If the guest has not been invited to the *Patient Portal* by a provider or practice, their name will not display on the list.

Invited Guest: Switch Users



There are multiple ways a guest can switch between users.

Note: If the guest has not been invited to the *Patient Portal* by a provider or practice, they will not have access to the options below.

a.Click the drop-down to select a user.

b.Click Back to my account to view their health information.

c.Click Patient Name and select *Switch User to* open the*Y our Accounts* page.