

## How to Navigate our New Patient Portal

You will receive a Patient Portal invite at the email address you have provided to our office. Open that email and follow the link to our portal site by double clicking. You should arrive at the patient portal check-in screen, which looks like this:

A screenshot of a web form titled "Log in." with the instruction "Enter your username and password to log in". It contains two input fields: "User Name" and "Password", and a "Log in" button at the bottom.

Enter the username and temporary password that were provided in the welcome email, and select the Log in button. You should arrive at this second screen, which requires you to re-input the temporary password provided in your portal email in the Current password field. Under the New password and Confirm new password fields, enter the password of your choice. It must be at least eight characters long.

A screenshot of a web form titled "Change Password". It contains three input fields: "Current password", "New password", and "Confirm new password", and a "Log in" button at the bottom.

Once you have set your permanent password, you should be at the third screen. This screen will show all patients for which the responsible party is responsible.



Summary / Log Out

Patient Name	Next Appointment	Due Now	Past Due	Total Due
Oscar Test		\$0.00	\$0.00	\$0.00

In order to go into a specific patient's information, simply select the patient's name by hovering over it and single clicking.



Summary / Oscar Test / Log Out

**Patient Forms**  
Patient has 0 new form(s) available and 0 saved form(s) available.

**Future Appointments**

Date	Time	Status	Location	Minutes
------	------	--------	----------	---------

**Past Appointments**

Date	Time	Status	Location	Minutes
------	------	--------	----------	---------

**Ledger Items**

Date	Time	Reference	Description	Amount
------	------	-----------	-------------	--------

On this screen, all the information available for this patient can be accessed. Beginning at the top is the Patient Forms section. Any forms that have been made available for you to complete on the Patient Portal can be accessed from this section. Simply select the number in front of "new forms" in the sentence Patient has (X) new form(s) and (Y) saved form(s) available. This should take you to the following screen:



Summary / Oscar Test / Log Out

New Forms	Available Forms
<ul style="list-style-type: none"><li>• Health History Form</li><li>• HIPAA Privacy Consent and Authorization</li></ul>	

There should be two columns on this screen. One is titled New Forms. This is the list of forms available for you to complete. Once you enter any information onto one of these forms and save it, they will appear in the available forms column. They are still available for you to add or correct information, but they are no longer "New".



[Summary](#) / [Oscar Test](#) / [Log Out](#)

**New Forms**

- [HIPAA Privacy Consent and Authorization](#)

**Available Forms**

- [Health History Form](#)

Once finished entering information, make sure you select the save button. The information you have completed is now readable in your patient chart by the office. If you need to return to the main patient screen, simply select their name from the top bar by single clicking. Once at the patient screen, you can view past and future appointments and ledger items. In each one of the sections, you can use the arrow keys to navigate to the previous page or the next page of results. Hovering over the arrow will pop up a reminder of its purpose.

If you (as the responsible party) are responsible for more than one patient, you can return to the Summary heading by single clicking the word “Summary”. This returns you to the Summary page, where you can view all patients for which you are responsible.



[Summary](#) / [Log Out](#)

Patient Name	Next Appointment	Due Now	Past Due	Total Due
Oscar Test		\$0.00	\$0.00	\$0.00

### Password Resets:

There is no method within the Patient Portal for you to reset your password if you forget or lose it. You will need to call our office and request that your Patient Portal password be reset. You will then receive another email with a temporary password. Follow the instructions above to reset. Please feel free to contact our office if you have any questions about the Patient Portal.