ChartMaker® Clinical Quick Reference Card

PatientPortal (Administrative Portal)

Registering a Patient (Practice Manager)

1. On the **Patient tab**, open the appropriate patient
2. Enter their **Email Address** and **DOB**
3. Click the **Patient Portal** button
4. Click **Authorize**
5. Click **OK** twice

- **NOTE**: The patient will not be registered until they log onto the portal themselves. Once the patient has completed the registration process, the patient portal button will turn yellow.
- **Button Colors**:
  Grey = not registered
  Yellow = registration pending
  Green = registration complete
  Red = clinical summary export suspended

Suspending Clinical Summary Export

(Practice Manager)

1. On the **Patient tab**, open the appropriate patient
2. Click the **Patient Portal** button
3. Check the box for **Suspend export on note signing**
4. Click **OK**

(Clinical)

1. Open the appropriate patient's chart
2. Click the **Patient Portal** button (below the Face Sheet)
3. Check the box for **Suspend export on note signing**
4. Click **OK**

- **NOTE**: The Clinical Summary will be sent to the PatientPortal upon signing of a note that includes an encounter code.

Logging into the PatientPortal

1. Open your web browser
2. Go to **https://chartmakerpatientportal.com**
   TIP: If doing it for the first time, add it to your favorites
3. Login using the **credentials** provided to you when you registered
4. Click **Sign in**

Home

- Any notifications broadcasted to your practice from STI Computer Services, Inc.

My Account

- Change your email on file
- Change your password on file

Patients

(Patients)

- List of all registered patients
- Ability to reset a registered patient's password
  NOTE: The patient has capability to reset their own password as well (through My Account). However, if they forget the security question, the practice will have to reset it for them. The patient will receive an email upon reset. Upon login, using the temporary password, they will be redirected to change their password.

(Announcements)

- Ability to send a broadcast message to all registered patients

Documents

- Ability to upload (non-patient specific) documents for your patients to access from the Documents section of the PatientPortal (i.e. Educational Materials, Registration Forms, Consents, etc.). **NOTE**: You will still need to click the 'Education Materials' button within Clinical to receive credit for the Meaningful Use measure pertaining to educational materials.
- Create Categories and Sub-categories to organize the documents
  NOTE: When adding Categories, the Description field is optional. You must first create a Category before having the option to create a Sub-category. To create a Sub-category, select the Category on the left and then select the option to **Add new sub category** from the bottom of that screen.
- Ability to re-arrange the order of your Categories and Sub-categories
  NOTE: To re-arrange the order of a Category, select **Reorder Categories** from the left and then drag and drop them in the order you prefer. To re-arrange the order of a Sub-category, select the Category first from the left and then select **Reorder Sub Categories** from the bottom.
- Account comes with 10 MB of storage space. Additional space available for a fee upon request.

ChartMaker® Clinical Quick Reference Card

PatientPortal (Administrative Portal Cont'd)

Settings
(General)

- Ability to configure the following:
  - Practice title as it appears on the masthead
  - Practice phone number (appears under Practice title)
  - Practice logo (200 KB or less) which is positioned to the left of Practice title
  - Portal theme (13 options for color scheme)
  - Patient data delay which is used to batch demographic updates (in case of multiple updates by patient). The default is 30 minutes.
  - Enable maintenance mode to suspend the ability for any user to log into the PatientPortal
- Click **Save** to accept any changes made

Settings
(Welcome Message)

- Ability to configure the message that will appear on the main page of the PatientPortal when a patient logs on
- Examples of information displayed here are (but not limited to):
  - Re-iterate calling 911 in case of emergency and not to use the PatientPortal
  - Identify practice hours
  - Practice contact information
  - Reminder to look in Messages to read instructions on how to use the PatientPortal
- To see what the Welcome Message will look like prior to finalizing, click **Preview**
  NOTE: You may have to allow pop-ups to view the preview

Settings
(Provider List)

- Maintain a list of providers that will be using the portal
- NPI number is required
- This list will be available to the patient when sending messages through the PatientPortal

Settings
(Message Settings)

- Customize message instructions for the various message types a patient can use
- Restore defaults to STI default
- To see what the message descriptions will look like prior to finalizing, click **Preview**
  NOTE: You may have to allow pop-ups to view the preview
- Click **Save** to accept any changes made

Settings
(Patient Terms of Use)

- This is the Authorization Agreement the patient will need to accept before finalizing the registration process and begin using the PatientPortal
- The PatientPortal will come with a generic Authorization Agreement that can be customized for your practice
- Click **Save** to accept any changes made

Patient Portal Messages (Practice Manager or Clinical)

Configure Distribution Lists

1. Click **To-Do** > **New Message/Task**…
2. Click **To…**
3. Highlight the appropriate distribution list
   NOTE: Distribution lists show as bolded text. The lists pertaining to the PatientPortal all start with "Patient Portal…". Options includes: **Appointment Requests, Billing Questions, General Messages, Health Questions, Imports** and **Refill Requests.**
4. Click **Edit**…
5. Add/remove users as needed
6. Click **Save**
7. Click **OK** or **Cancel**
8. Click **Cancel** to close the Message Details dialog

- These are system defaulted distribution lists and cannot be deleted

Respond to a Message from the PatientPortal

1. **Double-click** on the message from the To-Do List
2. Click **Reply to patient** and type your response
   NOTE: You can save a copy of this message in the patient's chart by selecting the **Yes and sign** option
3. Click **Send**

- Messages will appear on the appropriate user's To-Do List (See section on "Configure Distribution Lists")
- If you chose to save to the patient's chart, you will get a pop-up asking for you to name the note.

Send a Message to the PatientPortal

1. Click **To-Do** > **New Patient Portal Message…**
2. Enter a **Subject** and **Message**
3. Click **Send**

*** Remember to stay up-to-date with Meaningful Use changes at www.cms.gov**