# Wolf EMR
# Patient Portal User Guide

TELUS HEALTH
Information for Life.

Revised August 22, 2017. Wolf EMR v2017.3.

# Table of contents

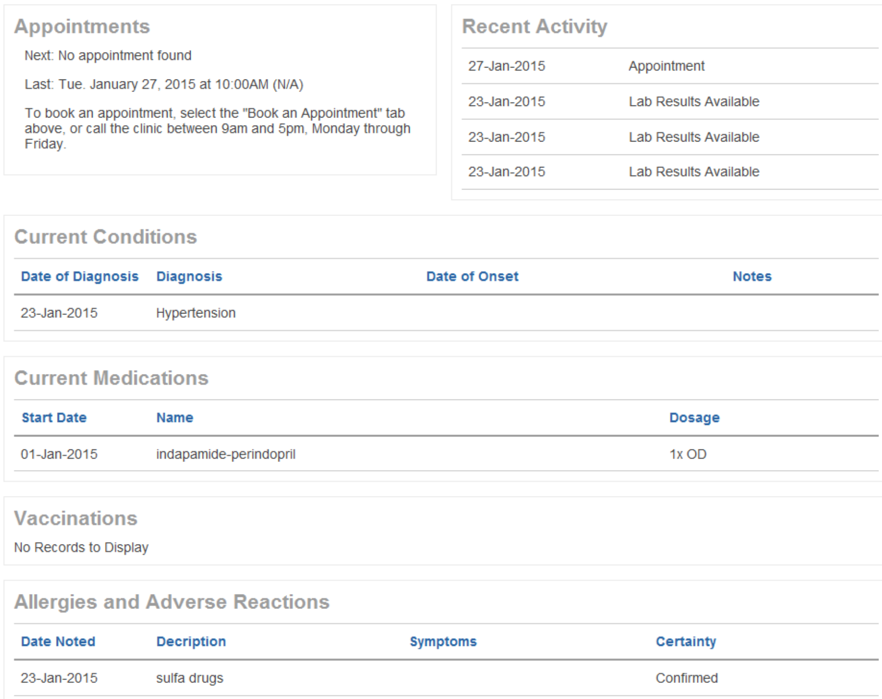
Chapter 1

# Patient portal

**View video:** **[Introduction to the patient portal]**

The patient portal is a web site that enables your patients to view certain areas of their medical chart online, including their:

- View and print their medical summary, current medications, vaccinations
- View their lab results and medical reports (documents)
- View, book, and cancel appointments online
- Receive messages from your clinic and automated notifications (such as to book appointments or come in for overdue tests)
- Send messages to your clinic




Your clinic can control the type of health information a patient can see and the actions a patient can perform in the patient portal.

To use the patient portal, your clinic must register for this functionality. Contact TELUS Health for more information.

Chapter 2

# Registering patients for the patient portal

**View video tutorial:** Registering patients for the patient portal

You can register any patient for the patient portal as long as they have the following information entered in **Patient Maintenance**:

- Email address
- Birth date

You can register only one patient at a time. When you register a patient, you choose which features the patient can access in the patient portal. For example, you can choose if a patient can book appointments online or send the clinic messages.

You can also register relations of a patient to access that patient's patient portal. You must obtain legal consent from the patient to allow a relation to access the patient's patient portal information. See "“Giving other people access to a patient's data” on page 11”.

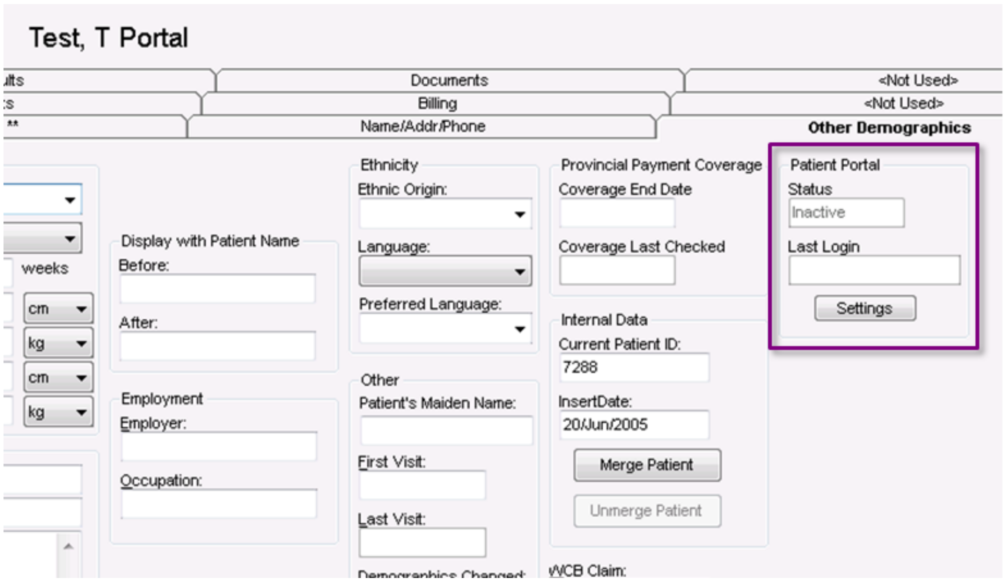
### Steps

1. Open the **Patient Maintenance** window for the patient.
2. On the **Name/Addr/Phone** tab, in the Communication area, enter the patient's email address in the **eMail** field.

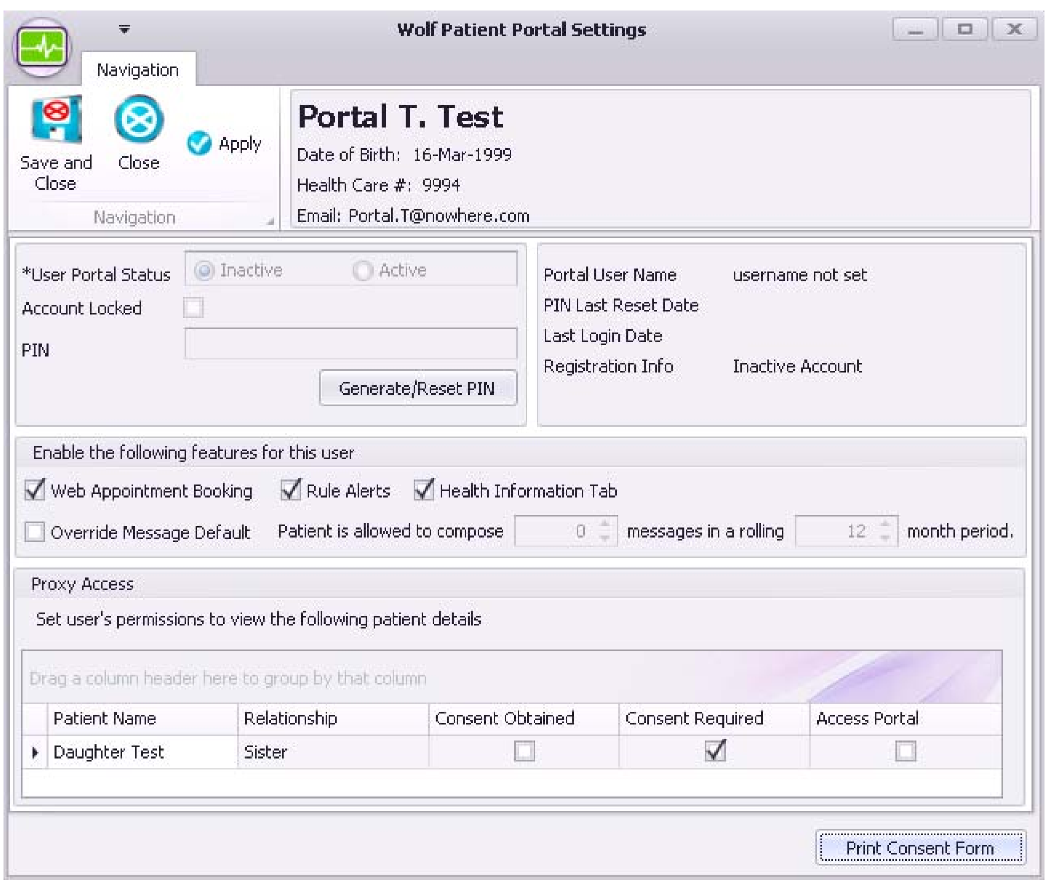
   **Tip:** When you add a new patient to Wolf EMR, be sure to record their email if they will likely use the patient portal (for example, patients with chronic diseases).

3. Click Save ().

4. Click the **Other Demographics** tab. The **patient portal** area appears on the right side of the window.




5. In the **patient portal** area, click **Settings**. The **Wolf patient portal Settings** window opens.



6. In the **Enable the following features for this user** area, use the following table to select which features the patient can access in the patient portal.

| Option | Description |
|---|---|
| **Web Appointment Booking** | To enable the patient to book appointments online. |
| **Rule Alerts** | To enable the patient to receive automated notifications when they are flagged by a patient portal rule. |
| **Health Information Tab** | To enable the patient to view their health information (medical summary), |
| **Messaging** | If your clinic is enabled for patient portal messaging, by default all patients enrolled in the patient portal can send you messages. The number of messages patients can send over a defined number of months is generally set in your clinic's patient portal configuration. See "Configuring patient messaging" on page 98.<br><br>However, if you want this patient to be able to send more or fewer messages than your clinic default:<br><br>1. Select the **Override Message Default** check box.<br>2. In the **Patient is allowed to compose** field, enter the number of messages the patient can send over a defined period of time.<br>3. In the **messages in a rolling x month period** field, enter the number of months that constitutes the defined period of time. |

7. Click **Generate/Reset PIN**. The EMR opens a PDF letter in the PDF-XChange Viewer. The body of the letter contains a message similar to the following example:

   December 8, 2015

   Dear Lindsay Test,

   Thank you for your interest in the Wolf Clinic Patient Portal.

   A message has been sent to the email address you have provided, which contains instructions for registration.

   **If you have not received the email in your inbox, please look in your junk or spam folders in case the email was misdirected.**

   The message will be from donotreply@mydrportal.com and the subject will be "Wolf Clinic Patient Portal Registration".

   The Personal Identification Number (PIN) we generated for you is H4JVS9NEJL. You will require this PIN in order to complete your registration. Please complete the registration as soon as possible, since for security purposes the link provided in the email will expire after December 11, 2015 05:51PM.

   If you have any questions, please contact us at (632) 791-2356.

   Sincerely,

   Wolf Clinic

   The EMR also sends an email message to the patient similar to the following:

   **donotreply@mydrportal.com**
   to me

   Dear Portal Test,

   Welcome to the Wolf Clinic Patient Portal.

   Please follow the steps below to complete the registration process.

   STEP 1: Go to the Registration Confirmation Link below.

   https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/RegisterAccount?userurltoken=de2c1ae3-b1cd-4a2e-afac-8158c983098f&id=e32d9bae-ce96-e411-865b-d8d385

   Important: As a security measure, you have until January 10, 2015 05:38PM to complete the registration process.

   Please note: The above link can only be used to complete the registration. Afterwards, please use https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/Login to lo

   STEP 2: Complete the registration form.

   You will require the PIN you received from Wolf Clinic Medical Group to complete your registration, as well as details in accordance with your health record.

   Step 3: Login – your registration is complete!

   Please do not reply to this email address.

   If you have any questions or concerns, call us at 111-111-1111.

   Thank You,

   The Wolf Clinic

   https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/Login

   The patient needs both the printed letter and the email to sign up for the patient portal.

8. To print the letter, in the PDF-XChange Viewer window, click **Print** (), or on your keyboard, press Ctrl+ P.

9. Give the letter to the patient. The patient requires the Personal Identification Number (PIN) in the letter to sign up for the patient portal.

**Note:** The portal user <u>should be present in person</u> to get their PIN. Avoid faxing or emailing the letter containing the PIN.
The PIN generated in the letter is valid for only a certain number of days and your clinic can configure this duration (see "Configuring patient portal registration rules" on page 96).

10. On the **Wolf patient portal Settings** window, click **Save and Close** ( ).

11. Once the patient completes the registration process, the EMR displays a globe icon ( ) in the patient's SMART patient banner to indicate that the patient has a patient portal account.


## Giving other people access to a patient's data

Patients can grant family members and other relations access to their patient portal. For example, an elderly patient with mild dementia can allow patient portal access to her daughter. Or, a young adult with a chronic condition can allow patient portal access to his mother.

The following steps describe how to grant a mother access to view her son's patient portal information.

### Steps

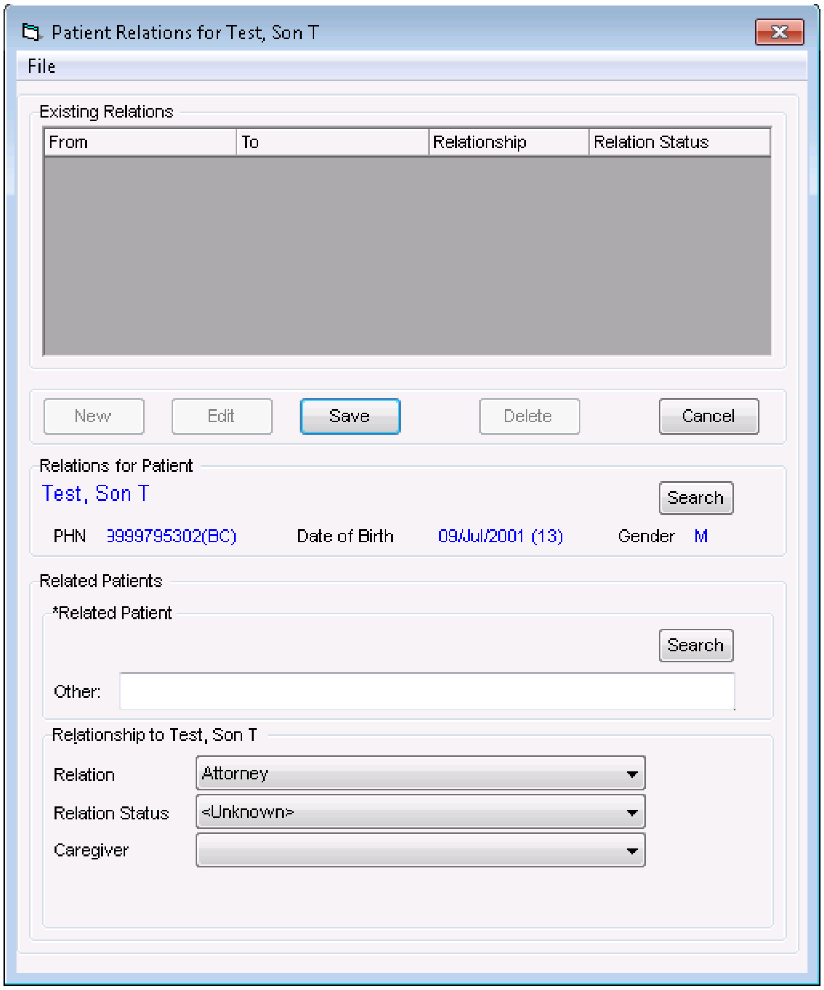
1. In the **Patient Maintenance** window, enter the mother into your Wolf EMR as a patient (if she is not already a patient. Ensure you enter the mother's email address and date of birth in the **Name/Addr/Phone** tab, in the **Communication** area.

   See "Patient Maintenance" in the Wolf EMR online help or user guide.

2. Link the mother and her son using patient relations:

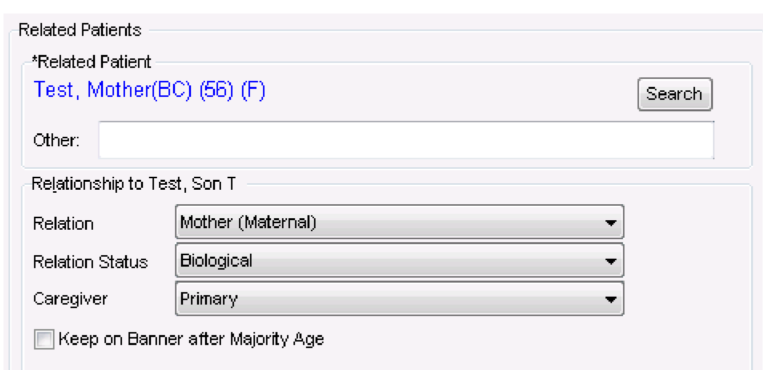
   a) Open the **Patient Maintenance** window for either the mother or son.

b) On the **Name/Addr/Phone** tab, in the **Relationship** area, click **Add/Edit**. The **Patient Relations for <patient name>** window opens.




c) In the **Related Patient** area, click **Search**.

d) Search for and select the individual you want to create a relation to. The EMR displays the selected individual's name in the **Related Patient** area.



e) In the **Relation** list, click the relationship the selected individual has to the patient.

f) In the **Relation Status** list, click the appropriate status for the relationship.

g) If the selected individual is the primary caregiver for the patient, in the **Caregiver** list, click **Primary**.

h) Click **Save**. The EMR displays the relation in the **Existing Relations** area at the top of the window.

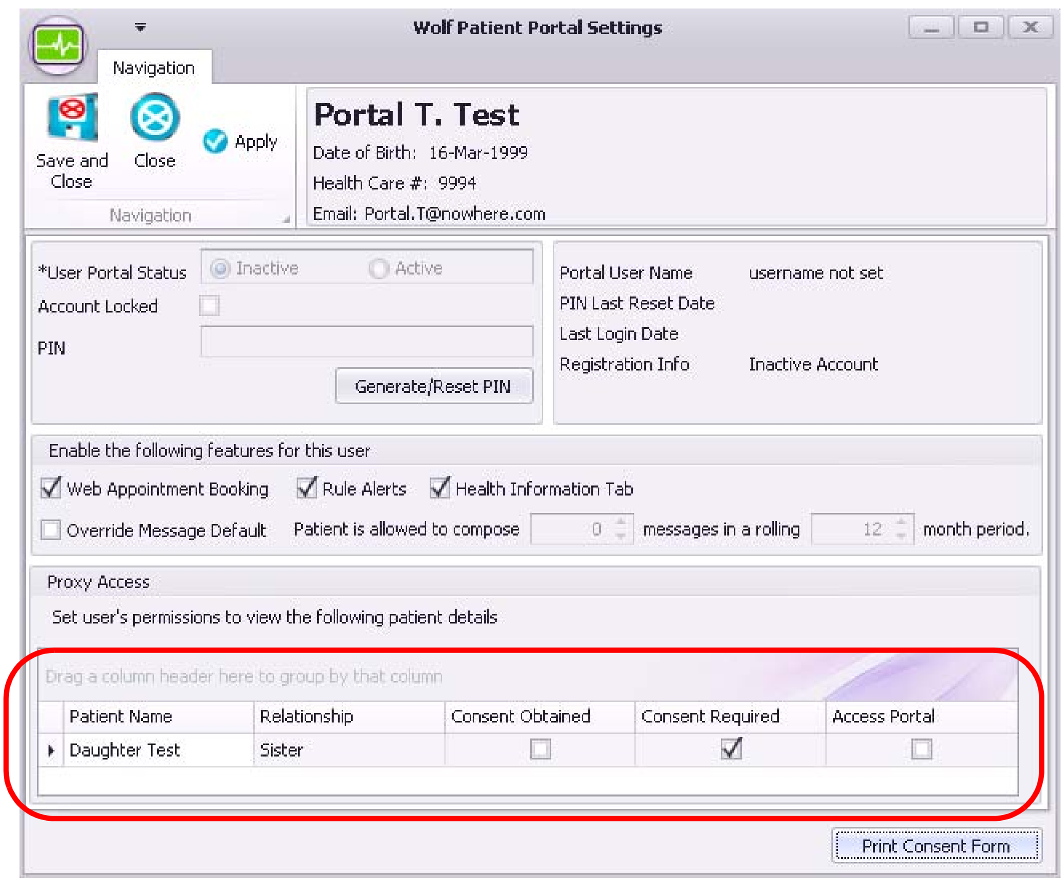
i) Click **Close** ( ).

3. Set up mother with access to her son's patient portal:

a) Open the **Patient Maintenance** window for the mother.

b) Click the **Other Demographics** tab.

c) In the **patient portal** area, click **Settings**. The EMR displays the **Wolf patient portal Settings** window, with mother's family members and other linked relations listed in the **Proxy Access** area.




**Note:** The **Consent Required** check box is selected if the patient is within the "Age of Consent". For patients younger than the age of consent, this check box is not selected as the patient is not required to sign a consent form.

d) In the **Proxy Access** area, click the son's name.

e) Click **Print Consent Form**. The EMR opens a PDF Consent Form in PDF-XChange Viewer. The body of the form contains a message similar to the following example:

Portal T. Test
123 Test Way SE
Victoria, BC, U1Z 5I7

Dear Portal T. Test:

**Re: Wolf Patient Portal – Consent To Disclose Personal Health Information**

I, **Portal T. Test,** authorize Wolf Clinic to disclose
☐ **my personal health information**
to Mother Test

**I understand the purpose for disclosing this personal health information to the person noted above. I understand that I can refuse to sign this consent form.**

Date: ____________________ Signed: ____________________

The patient can sign the consent form out of office if the form is appropriately witnessed. For example, if the patient is traveling, or is away at school.

Children younger than the age of consent do not have to sign a consent form for their parents or legal guardians, as consent is implied in this case. However, once the child reaches the age of consent, the child must then sign a consent form to enable their parent(s) to continue to access their patient portal.

**Note:** The "Age of consent" is determined and configured by your clinic. See "Configuring patient portal registration rules" on page 96.

f) To print the consent form, in the PDF-XChange Viewer window, click **Print** ( ), or press Ctrl+ P.

g) Have the son sign the consent form. To keep the signed consent form on file, scan the signed consent form, and then import it into the **Documents** area of the son's medical summary.

h) Beside the son's name in the **Proxy Access** area of the **Wolf patient portal Settings** window, select the **Consent Obtained** and the **Access Portal** check boxes.

i) If the other is not currently signed up for the patient portal herself, click **Generate/Reset PIN**. The EMR opens a PDF letter in the PDF-XChange Viewer.

j) Print and hand the letter to the mother.

Chapter 3

# Sharing information with patients on the patient portal

You can choose to hide specific medication information from all or select users (see "Hiding medical information on the patient portal" on page 17).

You can then publish documents and lab information to patients through the patient portal (see "Publishing patient documents to the patient portal" on page 21).

You can send and receive messages to and from patients (see "Sending and receiving messages" on page 25).

## Hiding medical information on the patient portal

By default, the patient portal displays the following "modules" of patient health information to registered users. Most information originates from the patient's medical summary.

- General patient demographics
- Previous and upcoming appointments
- Current problems
- Current medications
- Allergies
- Vaccinations
- Procedures and surgeries
- Social history
- Family history
- Harmful substances
- Other risks
- Investigations

If you do not want patients to see all of the above information, you can customize what patients see. You can:

- Hide select modules of health information for all patients.
- Hide select modules of health information for a particular patient.
- Hide select health information entries for a particular patient.
- Publish select documents for a particular patient.
- Publish investigations sooner or later than the standard “3 days after results are reviewed by the clinic”.

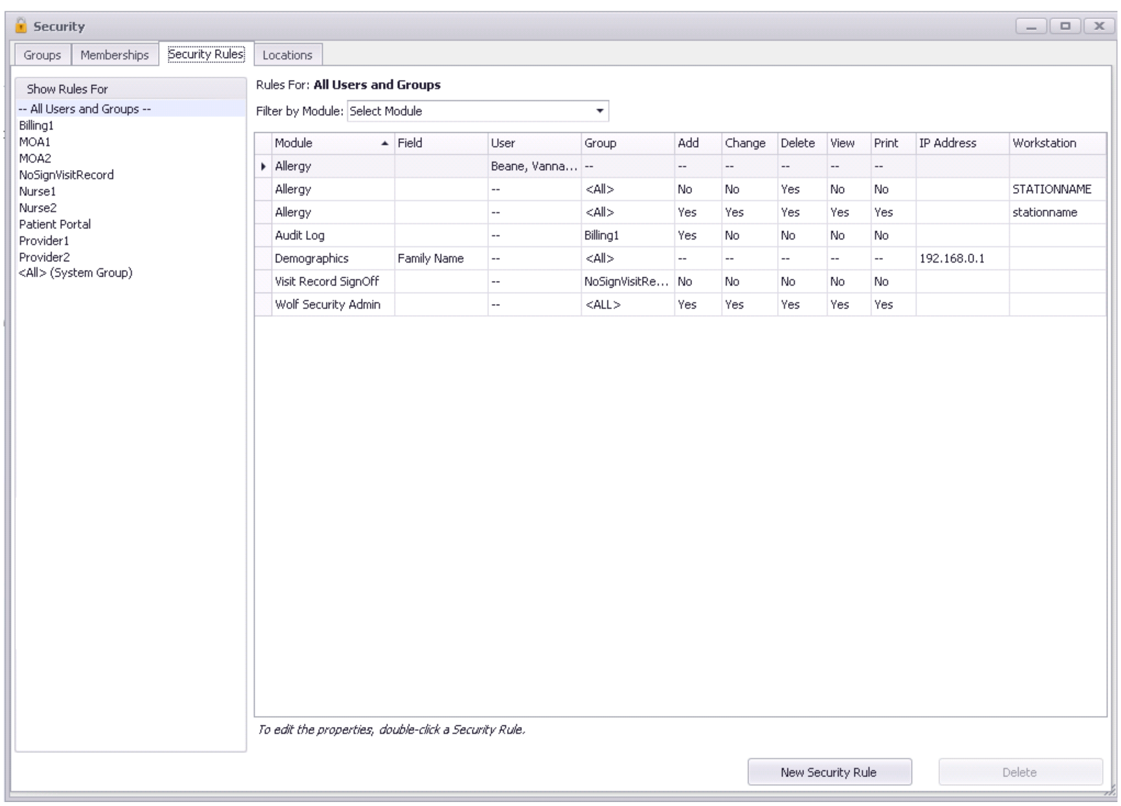
## Hiding health information for all patients

Using security rules, you can specify what health information your patients cannot view in the patient portal. For example, if you don’t want patients to view information in the **Social History** area of their medical summary, you can hide this module for all patients.

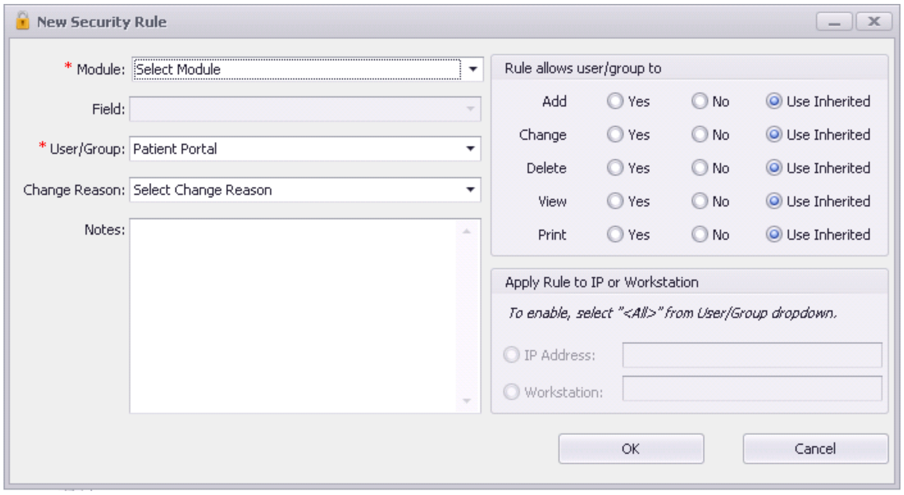
If you later decide to show information that you hid to all patients on the patient portal, you can delete the security rule that you created to hide the health information.

### Steps

1. On the Wolf EMR Home tab, click **Configuration** ( ).
2. From the **Configuration** menu, choose **View** > **Security** > **Security Rules**. The **Security** window opens with the **Security Rules** tab selected.



3. In the **Show Rules For** list on the left side of the window, click patient portal.
4. Click **New Security Rule**. The **New Security Rule** window opens.




5. In the **Module** list, click a module of the patient portal you want to hide.
6. In the **Change Reason** list, click the reason for the restriction. If you select **Other**, enter the reason in the **Notes** area.
7. In the **Rule allows user/group to** area, beside **View**, click **No**.
8. Click OK.
9. To hide other modules on the patient portal, repeat steps 4 to 8.
10. To delete a security rule:
    a) In the **Show Rules For** list on the left side of the window, click **Patient Portal**.
    b) On the right side of the window, the EMR displays all Security Rules that are currently applied to the patient portal.

## Hiding select health information for one patient

**View video:** [Hiding health information in the Wolf EMR Patient Portal]

You can control what health information a particular patient sees in the patient portal. For example, if a patient receives an abnormal lab result, you can hide the lab result on the patient portal until the patient discusses the result with their provider.

Using patient data restrictions, you can:

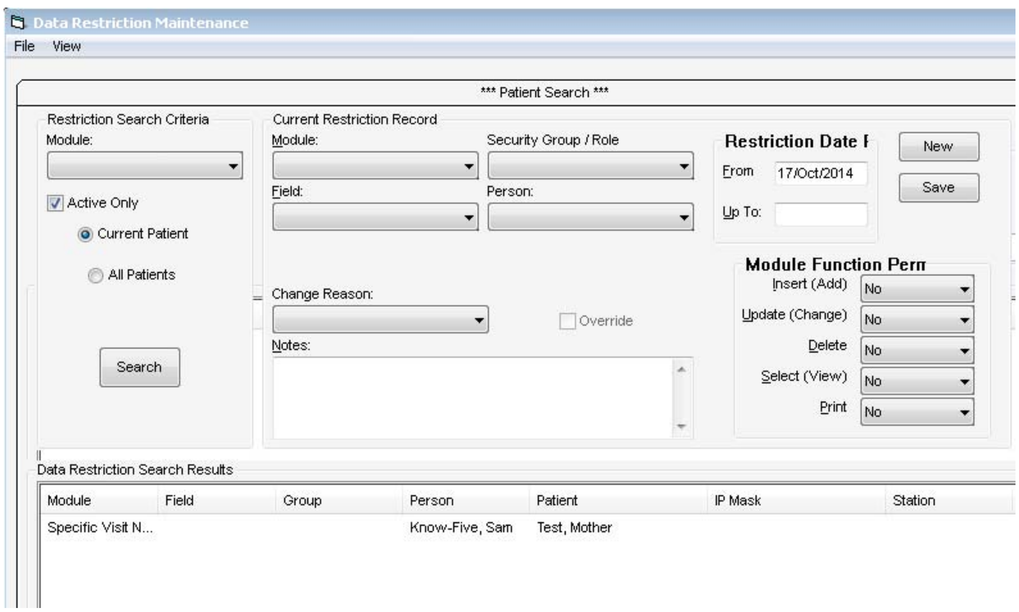
- Hide an entire module of health information.
- Hide a specific data entry.

- Select how long a particular module or data entry remains hidden.

### Steps

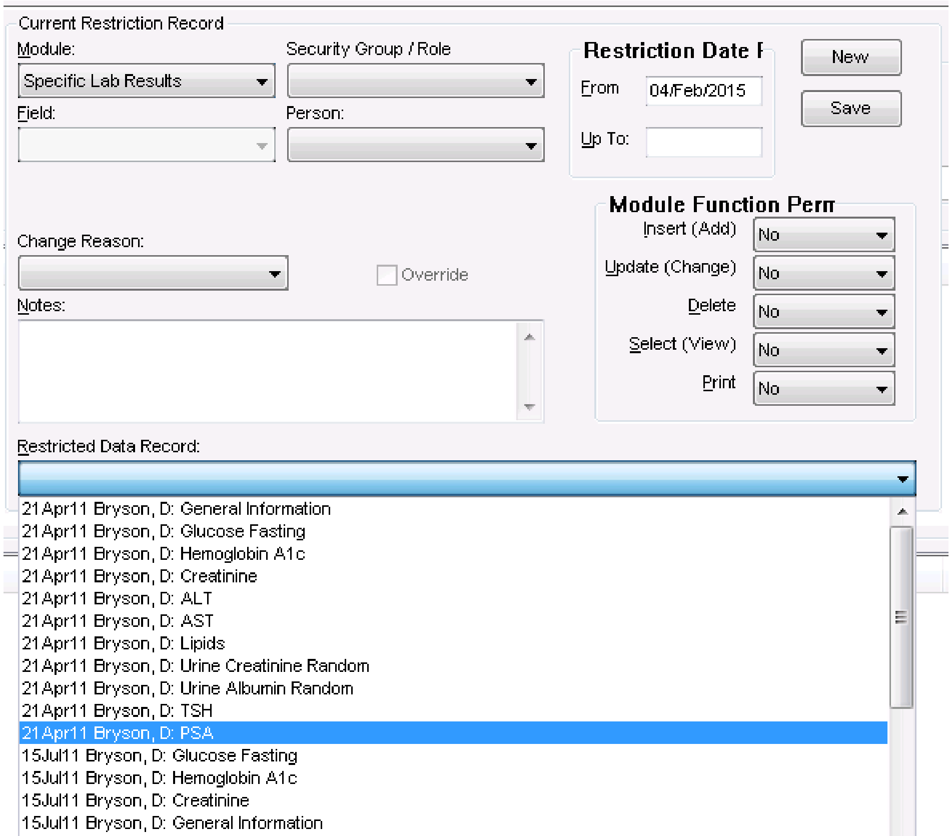
1. Open the **Patient Maintenance** window for the patient.
2. At the top of the window, click **View** > **Patient Data Restrictions**. The **Data Restriction Maintenance** window opens.

   **Note:** If a window with the message “You do not have sufficient rights to edit access restrictions” appears, contact the Wolf EMR support team at 1-866-879-9653 (Option 1).




3. To hide an entire module of medical information, in the **Module** list in the **Current Restriction Record** area, click the module. For example, if you want to hide information on harmful substances from the patient, click **Harmful Substances**.
4. To hide only a specific entry in a health information module:
   a) In the **Current Restriction Record** area > **Module** list, click **Specific <module>**, such as **Specific Lab Results**. The **Restricted Data Record** list opens.

b) In the **Restricted Data Record** list, click the specific data entry you want to hide.




5. In the **Security Group / Role** list, click **Patient Portal**.
6. In the **From** and **Up To** fields in the **Restriction Date Range** area, enter the date range for the information to remain hidden from the patient.

   **Tip:** To hide the health information for an indefinite amount of time, leave the **Up To** field blank.

7. In the **Change Reason** list, click **Other**, and then in the **Notes** area, type a reason for hiding the patient's health information.
8. In the **Select (View)** list in the **Module Function Permissions** area, leave **No** selected.
9. Click **Save**.

## Publishing patient documents to the patient portal

By default, documents, such as medical reports, that reside in the **Documents** area of a patient's medical summary are not visible to the patient. You must select what documents are to be published to the patient portal.

There are two areas in Wolf EMR where you can publish documents to the patient portal:

- In the **Investigation/Document In Basket** (enabling providers to publish new documents as they review them)
- In the **Documents** tab of a patient's medical summary.

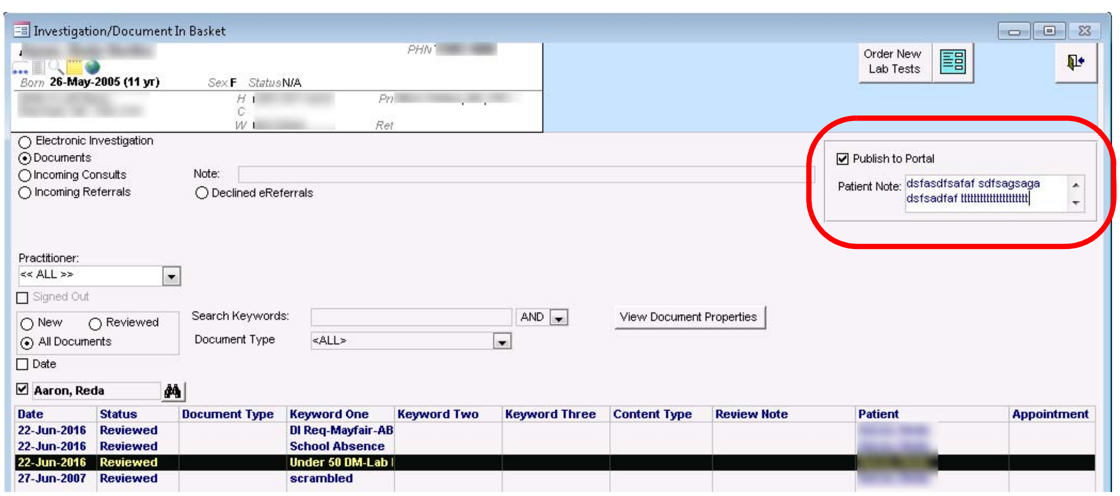
## Publishing new documents to the patient portal as you review them (providers)

Providers can publish new documents to the patient portal as they review them within the **Investigation/Document In Basket**.

By default, labs are published to the patient portal 3 days after reviewing them, giving your clinic time to call-back patients for abnormal results, and to hide particular lab results from the portal if a provider wants to discuss a result with their patient in person first. You can change this default delay; see "Delaying publishing of reviewed labs to the patient portal" on page 24.

### Steps

1. On the blue notification banner at the top of the WorkDesk, click **< #> Documents** (where <#> indicates the number of new documents available). The EMR displays the Investigation/Document In Basket window.
2. To view a document, in your list of new documents, double-click the document. The EMR opens the document in an appropriate program for the file type.
3. To post a document to the patient portal, in your list of new documents, click the document and select the **Publish to Portal** checkbox near the top right corner.
4. To add a note for the patient regarding the particular document, type it in the **Patient Notes** field.

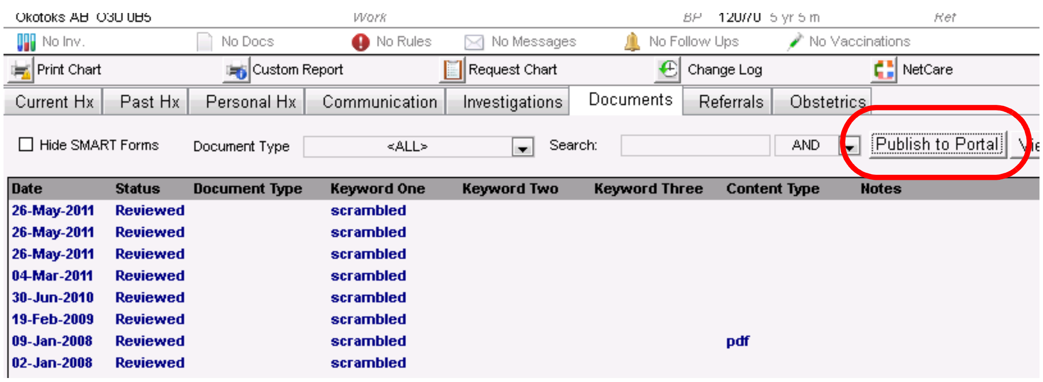


# Publishing documents to the patient portal from the medical summary

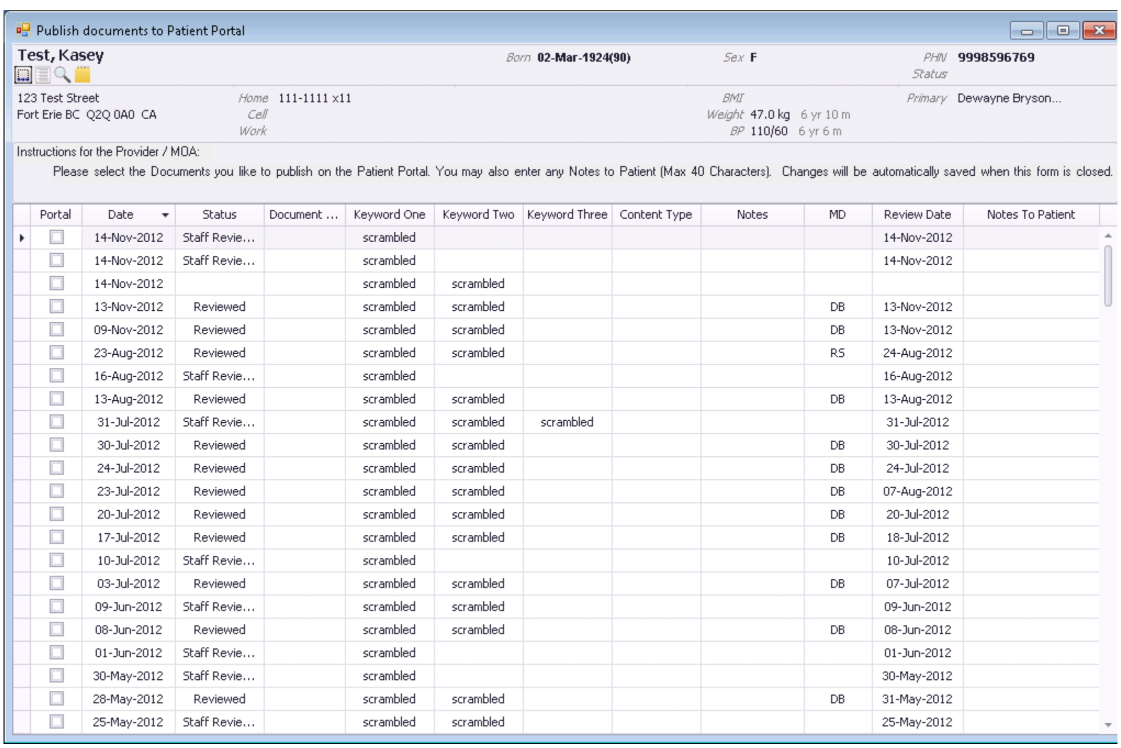
From a patient's medical summary, you can select one document or multiple documents at once to publish to the patient portal.

## Steps

1. In the patient's medical summary, click the **Documents** tab.
2. Click **Publish to Portal**.




The **Publish documents to patient portal** window opens with a list of the patient's documents.




3. In the list of documents, select the check box beside documents you want to publish to the patient portal.

4. To add any notes to the patient regarding a particular document, in the **Notes to Patient** column, enter your notes to the patient.

5. When you are finished selecting documents, click **Close** ( ). The EMR confirms that the document(s) were published or updated to the portal.

6. Click **OK**.

## Delaying publishing of reviewed labs to the patient portal

After providers review labs, by default, labs are not published to the patient portal for 3 days. This delay in lab publishing gives your clinic time to call-back patients for abnormal results, and to hide particular lab results from the portal if a provider wants to discuss a result with their patient in person first.

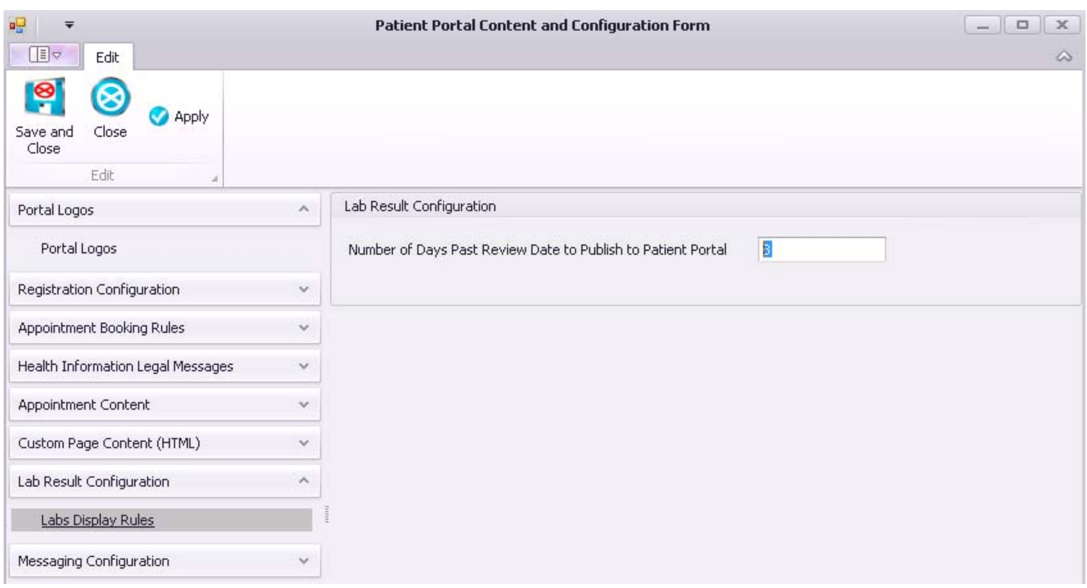
You can change the number of days until reviewed lab results (for all patients) are published to the patient portal.

### Steps

1. From the Wolf EMR Home page, click the **Maintenance** tab.

2. On the **Maintenance** toolbar, in the **Patient Portal** area, click **Configure Web Content** ( ). The **Patient Portal Content and Configuration Form** window opens.

3. In the column along the left side of the window, click **Lab Result Configuration**, and then click **Labs Display Rules**.




4. In the **Number of Days Past Review Date to Publish to Patient Portal** field, type the number of days.

5. When you are finished, perform one of the following actions:

- To apply your changes to the patient portal now, click **Apply** ( ).
- To save your changes, but not apply the changes to the patient portal, click **Save and Close** ( ).
- To close the window without saving your changes, click **Close** ( ).

# Sending and receiving messages

If your clinic is set up for patient portal messaging, you can:

- Send messages to patients
- Delete messages that were sent to patients
- Track if patients have viewed their messages
- Receive messages from patients (if you are a provider)

## Sending messages to patients

Any clinic user can send a message to a patient via the patient portal. When you send a message to a patient, you are indicated as the sender. You cannot send a message on behalf of another user. You send messages to patients using the same messaging system you use to send messages to clinic members in Wolf EMR.

When patients receive a patient portal message, they are notified by email. Patients can then log into the patient portal to view their message(s). You can specify whether the patient is able to reply to your message (instead of having to call the clinic).

You can automatically track messages sent to patients and create a follow-up task if the patient does not view, reply, or book an appointment within a set period of time after receiving your message. This enables you to track non-action by patients and automatically assign the follow-up task to someone in your clinic for further action.

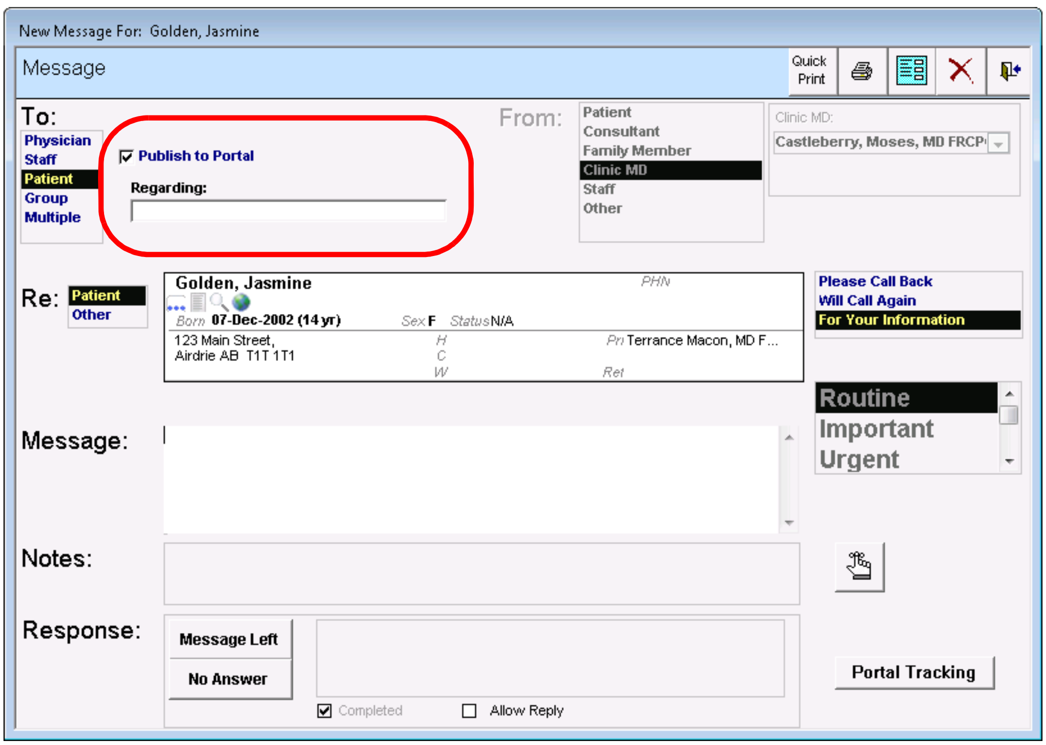
For example, you send a message to a patient asking them to provide you with information by replying to the message within 48 hours. When creating the message, you click the new Portal Tracking button, and then specify that if the patient does not take this action, a front-end staff member is notified.

### Steps

1. Open any window of the patient's chart (for example, the medical summary or a SOAP note).

If the patient is a patient portal user, the EMR displays a patient portal icon ( ) in the SMART patient banner.


2. Right-click and then, in the SMART menu, click **New Message**. The **New Message For: <patient name>** window opens.
3. In the **To** area, click **Patient**. The EMR displays options for publishing the message to the patient portal.




**Note:** If the patient portal messaging options do not display, the patient is likely not set up as a patient portal user. Ensure the patient portal icon ( ) is displayed in the SMART patient banner. See “Registering patients for the patient portal” on page 7.

4. Select the **Publish to Portal** check box. The EMR selects your name in the **From** area. You cannot send messages on behalf of someone else.
5. In the **Regarding** field, type the reason or subject for the message.

6. In the **Message** area, type the message body.
7. If you want to enable the patient to reply to the message, select the **Allow Reply** check box. The patient will see a reply button in the message and the reply will go directly to you, the sender.
8. To track the message and create a follow-up task if the patient does not action the message within a set period of time:

   a) Click **Portal Tracking**. The **Portal Message Tracking** window opens.

   b) Specify the recipient of the follow-up task, action that the patient must take, and the period within which they must take action.

   The default recipient is the follow-up default recipient specified within your WorkDesk user preferences.

   c) Click **Save**. Information about the tracking is saved within the message log and details.

9. Click **Close & Save Message** (). The EMR sends an email to the patient indicating that a message is available in the patient portal. The patient can log into the patient portal to view the message. See “Viewing messages from patients” on page 29.

## Verifying that a patient has viewed a message

You can verify that a patient has viewed a specific message by looking at the log information.

You can also automate the creation of a follow-up task if the patient has not viewed the messages (see “Sending messages to patients” on page 25).

### Steps

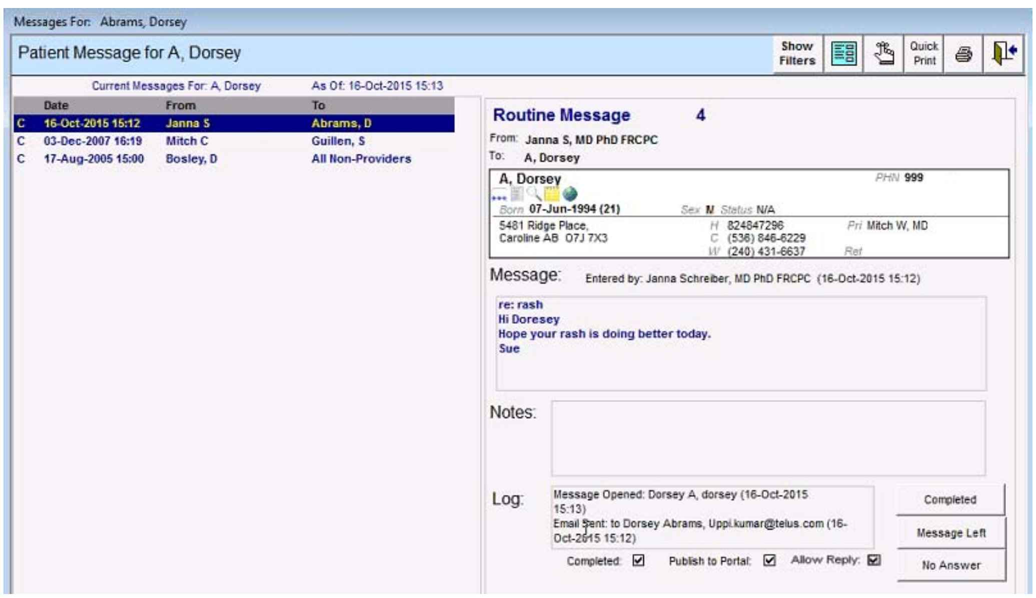
1. Open the message:

   a) Open the patient’s medical summary.

   b) Click the **Communications** tab. The EMR displays a list of the patient’s completed and outstanding messages in the left pane.

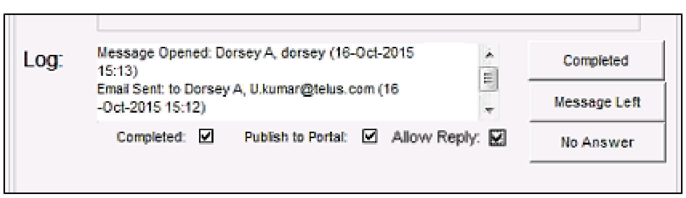
   **Note:** All patient portal messages are marked as complete (as indicated by a C to the left of the message) as soon as they are sent to a patient.

   c) Double-click the message. The EMR displays the **Patient Message for <patient name>** window, with the selected message’s details displayed in the right pane.




2. In the **Log** area of the message, scroll down to view information on:

   - When the message was sent and who sent the message
   - The date and time that the message was opened



## Removing a message from the patient portal

If you send a message in error (for example, if you send a message to the wrong member of a family), you can remove the message from the patient portal.

### Steps

1. Open the message:

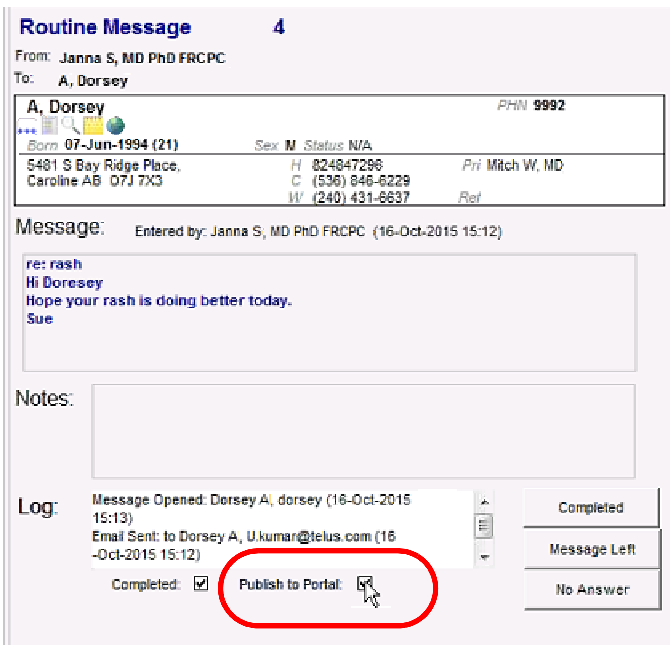
    a) Open the patient's medical summary.

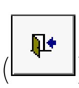
    b) Click the **Communications** tab.

    **Note:** The EMR displays a list of the patient's completed and outstanding messages in the left pane.vAll patient portal messages are marked as complete (as indicated by a C to the left of the message) as soon as they are sent to a patient.

    c) Double-click the message. The EMR displays the **Patient Message for <patient name>** window, with the selected message's details displayed in the right pane.

2. At the bottom of the message detail area, clear the **Publish to Portal** check box.



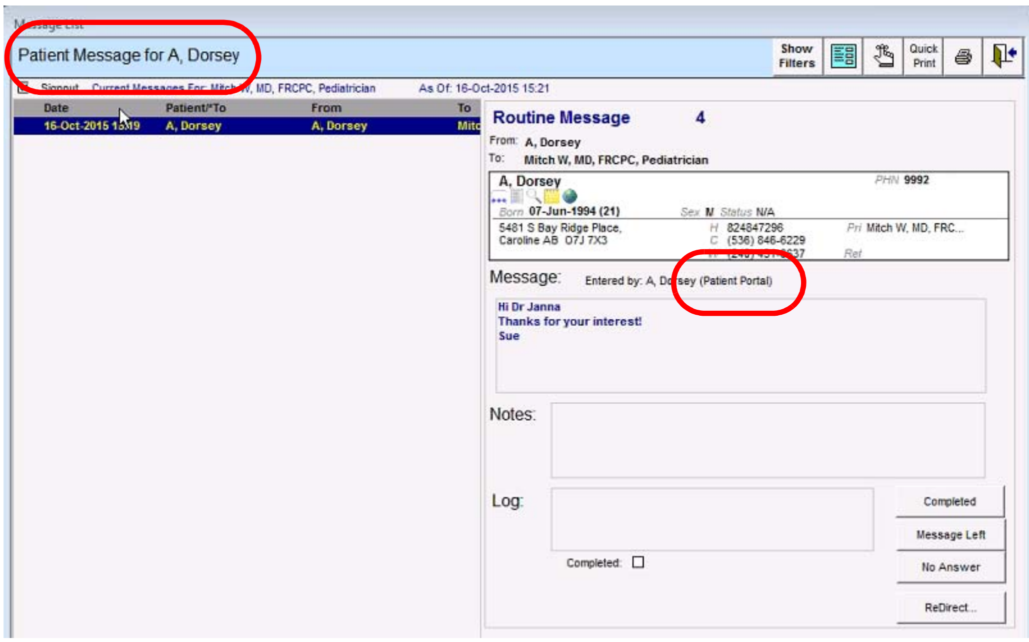

3. Click **Close Form** ().

## Viewing messages from patients

Only providers can receive patient portal messages from patients. Messages from patients appears in your Wolf EMR messages list. If you are a provider and you do not want to manage messages originating from the patient portal, you can redirect them to your front-end staff.

## Steps

1. Open your outstanding Wolf EMR messages: Open the WorkDesk, and then on the blue banner (located at the top of the window), click **# Current Messages** (where # = the number of your outstanding messages).
2. In your list of outstanding messages, click a message that contains a patient name in the **From** column. The EMR displays:
   - The message title: **Patient Message for <patient name>** at the top of the window
   - The message contents in the right pane
   - Patient portal beside **Entered by**




3. Perform one of the following actions:
   - To redirect the message to another staff member, click **ReDirect**.
   - To mark the message as viewed and to remove the message from your list of outstanding messages, click **Completed**.

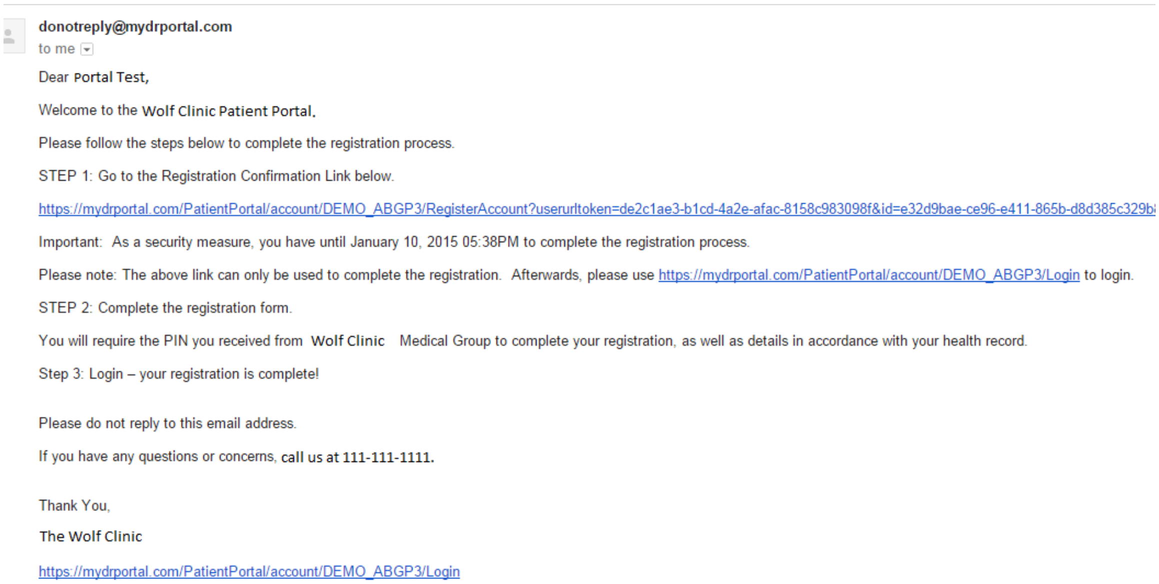
**Note:** You cannot reply directly to the patient from the message. Instead, you must compose a new message to the patient. See “Sending messages to patients” on page 25.

# Chapter 4

# Using the patient portal (patient perspective)

To gain access to the patient portal, you must receive an invite from your clinic. The clinic gives you a paper registration letter, and sends you a registration email. Do not throw the letter away as you need the PIN to sign into the patient portal for the first time.

Following is an example of the email you receive.



**donotreply@mydrportal.com**
to me

Dear Portal Test,

Welcome to the Wolf Clinic Patient Portal.

Please follow the steps below to complete the registration process.

STEP 1: Go to the Registration Confirmation Link below.

https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/RegisterAccount?userurltoken=de2c1ae3-b1cd-4a2e-afac-8158c983098f&id=e32d9bae-ce96-e411-865b-d8d385c329b

Important: As a security measure, you have until January 10, 2015 05:38PM to complete the registration process.

Please note: The above link can only be used to complete the registration. Afterwards, please use https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/Login to login.

STEP 2: Complete the registration form.

You will require the PIN you received from Wolf Clinic Medical Group to complete your registration, as well as details in accordance with your health record.

Step 3: Login – your registration is complete!

Please do not reply to this email address.

If you have any questions or concerns, call us at 111-111-1111.

Thank You,

The Wolf Clinic

https://mydrportal.com/PatientPortal/account/DEMO_ABGP3/Login

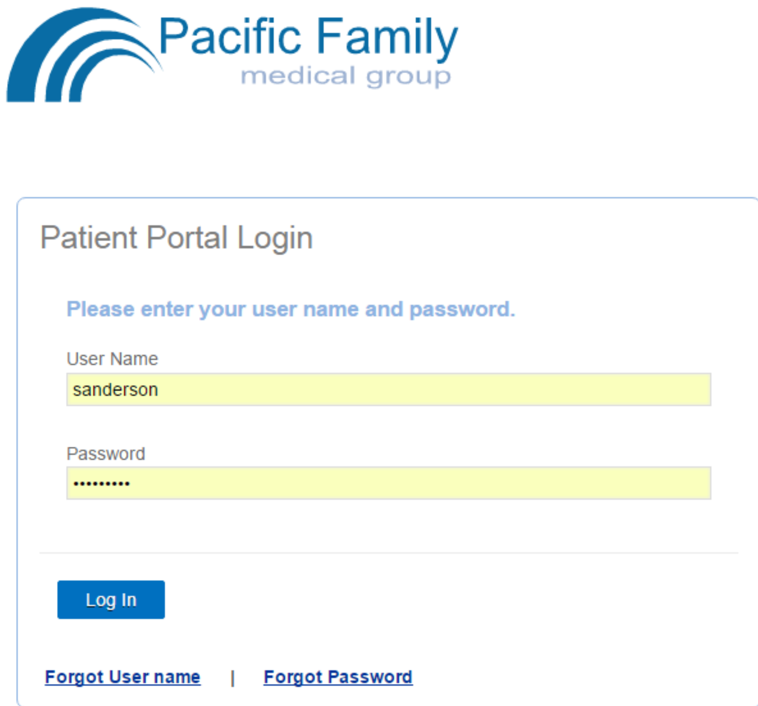
The registration email provides you with a link to the clinic's patient portal website.

**Tip:** Add the patient portal link to your web browser favourites so you can easily access the website going forward.

### Steps

1. Open a web browser, and then go to the clinic's patient portal website address.

2. In the login page, type your user name and password, and then click **Log In**.



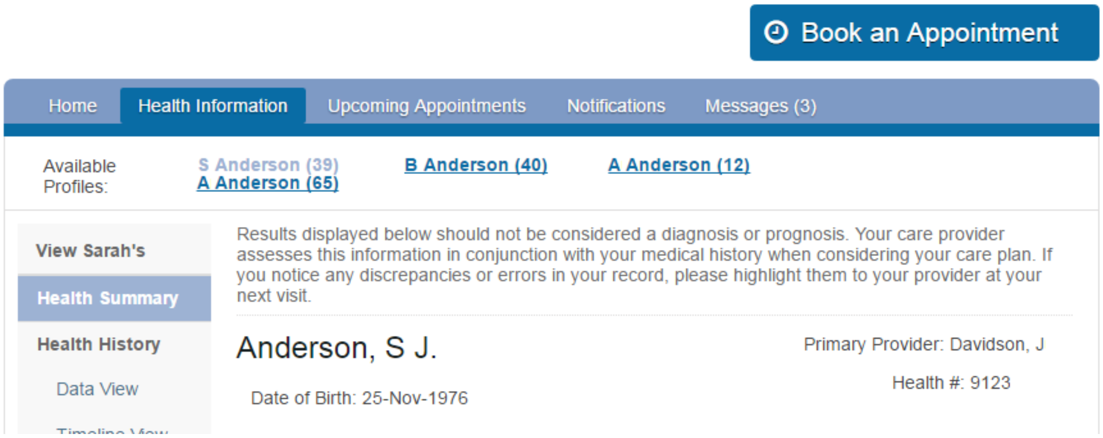

## Viewing your health information

In the patient portal you can view select portions of your health information and the health information of other patients you have access to. The available health information is read-only; you cannot modify or respond to health information in the patient portal.

### Steps

1. At the top of the patient portal, click the **Health Information** tab. The **Health Information** page opens with:
   - A list of available profiles listed at the top of the page (if you have access to other patient's health information).

- A menu of available health information along the left side of the window.




2. If you have access to other patients' health information, in the **Available Profiles** list, click the patient you want to view health information for.

   **Note:** Your health information displays by default. The clinic sets up available profiles. If you want to view health information for a relation that is not listed, you must receive consent from the patient and request access from the clinic.

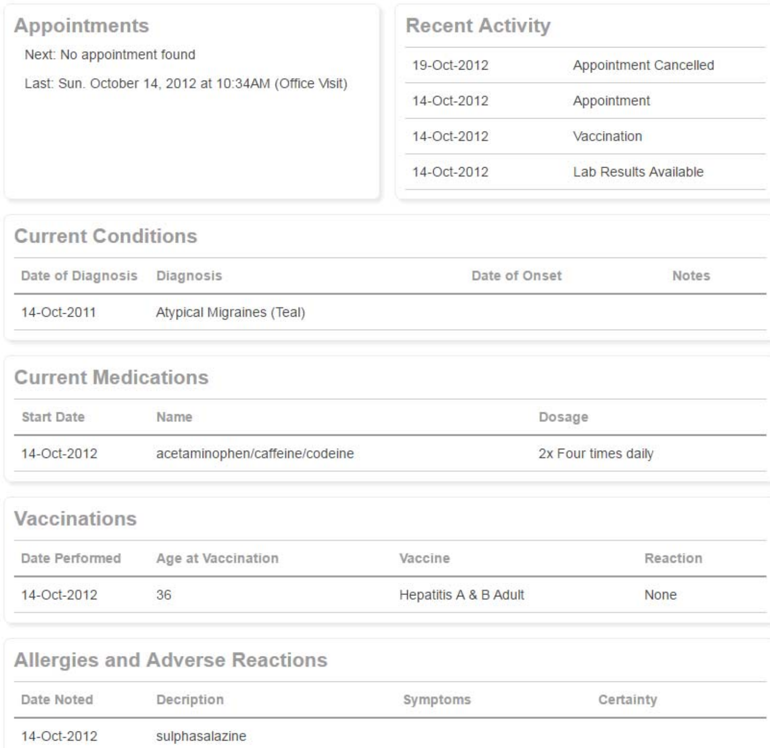
3. In the menu on the left side of the window, click the type of health information you want to see.

## Health Summary page

The **Health Summary** page shows a summary of your current health information, including:

- Your next and last appointment date and time
- You recent booking activity
- Current conditions
- Current medications
- Vaccinations

- Allergies and adverse reactions



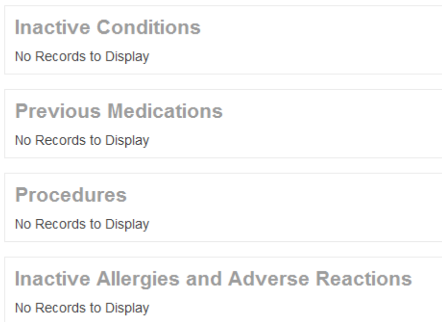

## Health History page

The **Health History** page displays a summary of your past health information, including:

- Inactive conditions (for the past 5 years – by default)
- Previous medications (for the past 5 years – by default)
- Procedures
- Inactive allergies and adverse reactions

### Data View

Displays health history information in a list format.

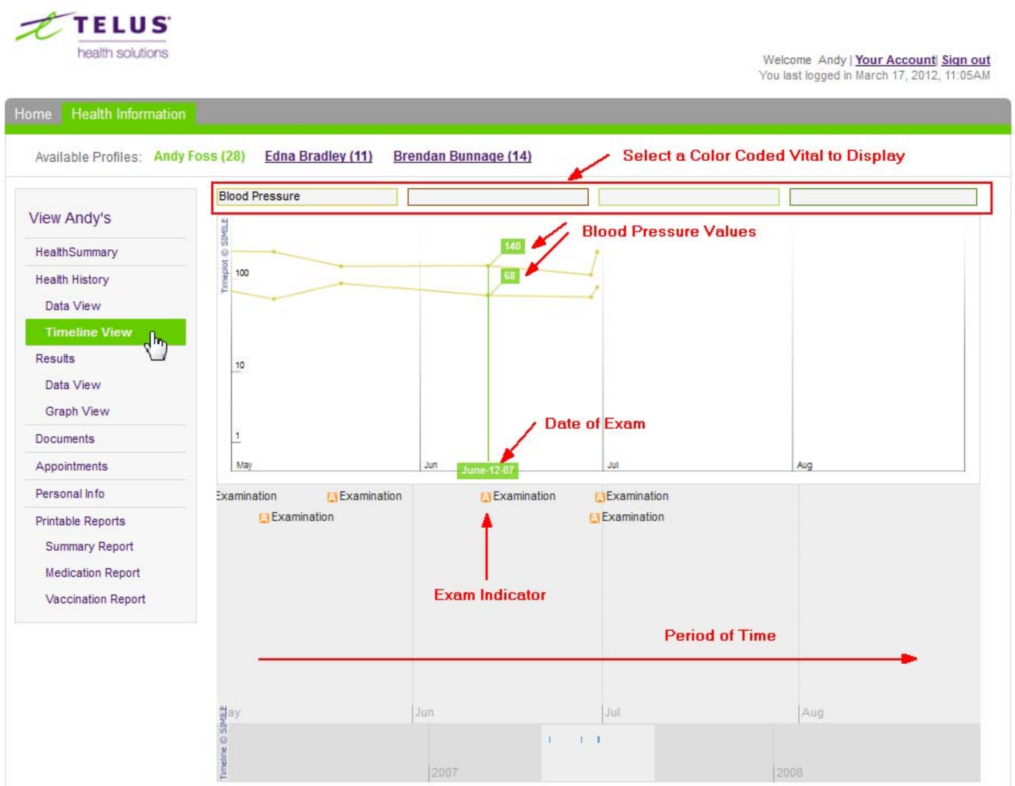



### Timeline View

Displays both your historic and current health information in a graphical format. The timeline includes:

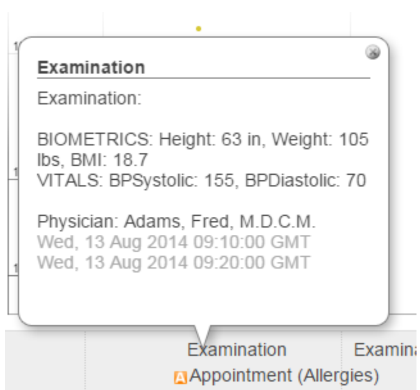
- Appointment dates and details
- Examination dates with some details (including height, weight, BMI)
- Vitals (including blood pressure, temperature, and pulse)
- Investigations (including hemoglobin, mononucleosis [MONO] Test, carboxy-tetrahydrocannabinol confirmation [THC], white blood cell count [WBC])

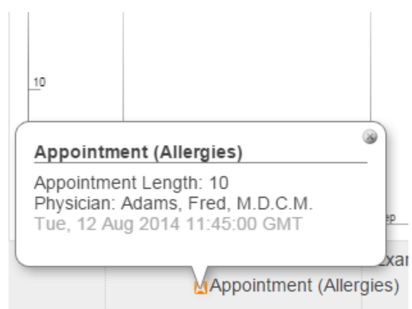
- Diagnosis dates for conditions



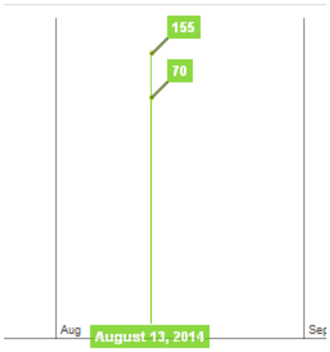

To navigate the timeline:

1. To scroll backwards or forwards on the graph, in the grey area below the graph, click and drag your cursor. The timeline moves with your cursor.
2. To view details for a specific appointment or examination listed in the grey area of the timeline, click the appointment or examination text. The timeline displays the details for the appointment or examination.

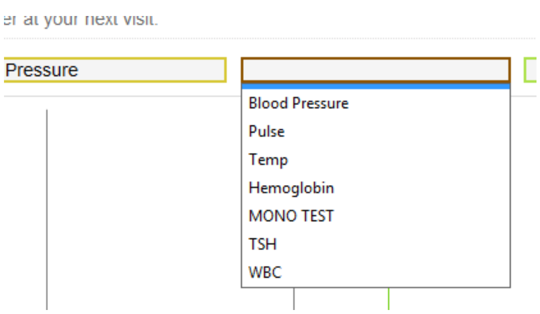


3. To view details for a specific data point on the graph, hover your cursor over the point. The timeline displays the date and data value.




4. To include a particular vital or investigation on the graph, click one of the color-coded fields at the top of the graph and then, in the list of available vitals and investigations, click the value you want to graph.




## Results page

The **Results** page displays your lab and other investigation results for the past 5 years (by default). You can view your results using two different view options.

### Data View

Displays your results in a table with the test date, type, result, result range, and whether the result was abnormal.

#### Lab Results

Drag a column header and drop it here to group by that column

| Date | Test Type | Test | Abnormal | Result | Range |
|---|---|---|---|---|---|
| 01-Oct-2012 | WBC | WBC | | 4.9 10E9/L | |
| 01-Oct-2012 | Hgb | Hgb | | 139 g/L | |
| 01-Oct-2012 | Baso | Differential: Baso | | 0.0 | |
| 01-Oct-2012 | EOS | Differential: Eosinophils | | 0.1 | |
| 01-Oct-2012 | Lymph | Differential: Lymph | | 1.7 | |
| 01-Oct-2012 | Mono | Differential: Mono | | 0.4 | |
| 01-Oct-2012 | Neutro | Differential: Neutro | | 2.7 | |
| 01-Aug-2014 | WBC | WBC | | 6.0 10E9/L | |
| 01-Aug-2014 | Hgb | Hgb | | 130 g/L | |
| 01-Aug-2014 | TSH | TSH | | 1.7 mU/L | |
| 01-Aug-2014 | Baso | Differential: Baso | | 0.0 | |
| 01-Aug-2014 | EOS | Differential: Eosinophils | | 0.0 | |
| 01-Aug-2014 | Lymph | Differential: Lymph | | 2.0 | |
| 01-Aug-2014 | Mono | Differential: Mono | | 0.5 | |
| 01-Aug-2014 | Neutro | Differential: Neutro | | 3.5 | |

To change the sort order of the table, click a column heading.

The page sorts the result by the contents of the selected column.

To categorize the results, click a column header and drag it to the area above the table. The page categorizes the results by the contents of the selected column.

For example, if you categorize results by test, the table displays all results for each test together:

**Lab Results**

Test

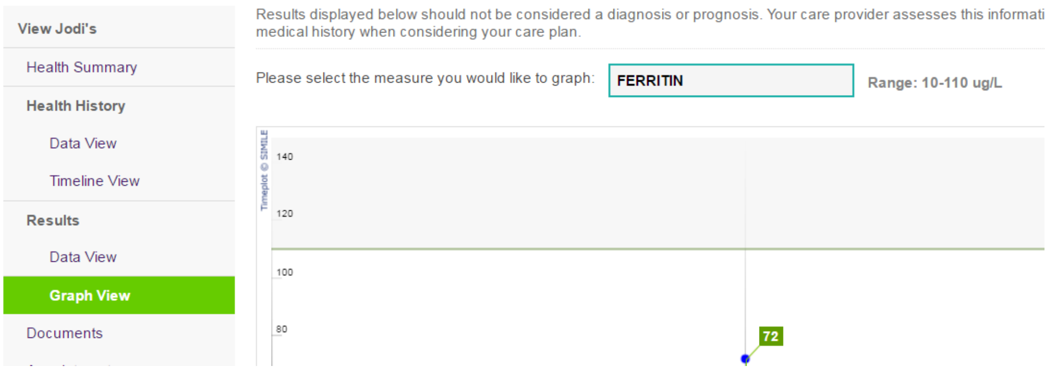
| Date | Test Type | Test | Abnormal | Result | Range |
|---|---|---|---|---|---|
| Test: Differential: Baso | | | | | |
| 01-Oct-2012 | Baso | Differential: Baso | | 0.0 | |
| 01-Aug-2014 | Baso | Differential: Baso | | 0.0 | |
| Test: Differential: Eosinophils | | | | | |
| 01-Oct-2012 | EOS | Differential: Eosinophils | | 0.1 | |
| 01-Aug-2014 | EOS | Differential: Eosinophils | | 0.0 | |
| Test: Differential: Lymph | | | | | |
| 01-Oct-2012 | Lymph | Differential: Lymph | | 1.7 | |
| 01-Aug-2014 | Lymph | Differential: Lymph | | 2.0 | |
| Test: Differential: Mono | | | | | |
| 01-Oct-2012 | Mono | Differential: Mono | | 0.4 | |
| 01-Aug-2014 | Mono | Differential: Mono | | 0.5 | |
| Test: Differential: Neutro | | | | | |
| 01-Oct-2012 | Neutro | Differential: Neutro | | 2.7 | |
| 01-Aug-2014 | Neutro | Differential: Neutro | | 3.5 | |
| Test: Hgb | | | | | |
| 01-Oct-2012 | Hgb | Hgb | | 139 g/L | |
| 01-Aug-2014 | Hgb | Hgb | | 130 g/L | |
| Test: TSH | | | | | |
| 01-Aug-2014 | TSH | TSH | | 1.7 mU/L | |
| Test: WBC | | | | | |
| 01-Oct-2012 | WBC | WBC | | 4.9 10E9/L | |
| 01-Aug-2014 | WBC | WBC | | 6.0 10E9/L | |

To change the order of the table columns, click a column header and drag it to where you want the column to display.

### Graph View

Displays your results in the form of a graph. From the top, select the measure that you want to graph.

Click or hover your mouse over a data point to see the date and time of the result. The normal range appears next to the measure name at the top and within the graph.




## Documents area

The **Documents** area displays a list of your health documents, such as medical reports, requisition forms, and consult letters.

**Documents**

| Date | Document Type | Notes | Keywords | Notes For Patient |
|---|---|---|---|---|
| 18-Aug-2014 | Note | Absence certificate | Work Absence | notes |
| 18-Aug-2014 | Requisition | | 2nd Trimester Prenatal Req-AB | still more note |
| 16-Sep-2014 | Incoming Consult | | Mole Check | final notes |

Click the document to open it in a separate window or tab in your internet browser.

**Troubleshooting**: What if the document does not open?

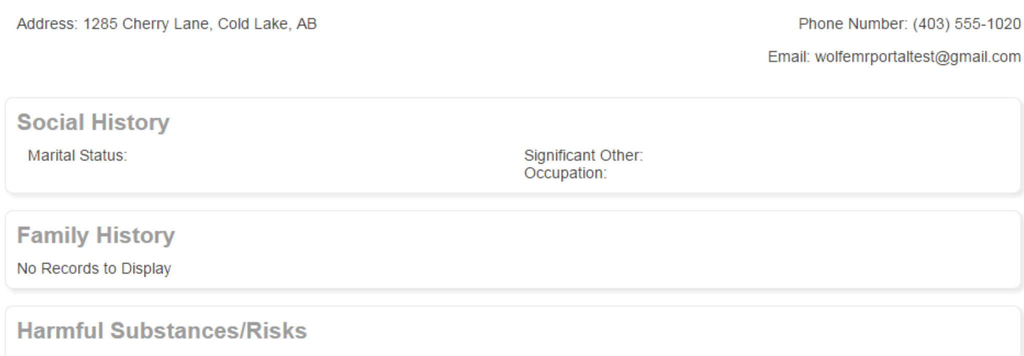
Your web browser is likely out of date. Try opening the patient portal in another web browser, or update the browser you are currently using.

## Appointments page

The **Appointments** page displays a summary of your upcoming and past appointments in a table format.


## Personal Info page

The **Personal Info** page displays your contact information and other personal information. If your contact information is out-of-date, contact the clinic to inform them of the change. You cannot edit your personal information in the patient portal.




## Printing your health information

You can print your patient portal health information in a printer-friendly format. Available reports include the:

- **Summary Report**: Prints your current health information, including vaccinations, allergies, current conditions, and current mediations.
- **Medication Report**: Prints your current medications, past medications, and allergies.
- **Vaccination Report**: Prints your recorded vaccinations.

### Steps

1. Navigate to the **Health Information** tab of the patient portal.
2. In the left pane, in the **Printable Reports** area, click the report you want. The page displays the selected report in a PDF view.

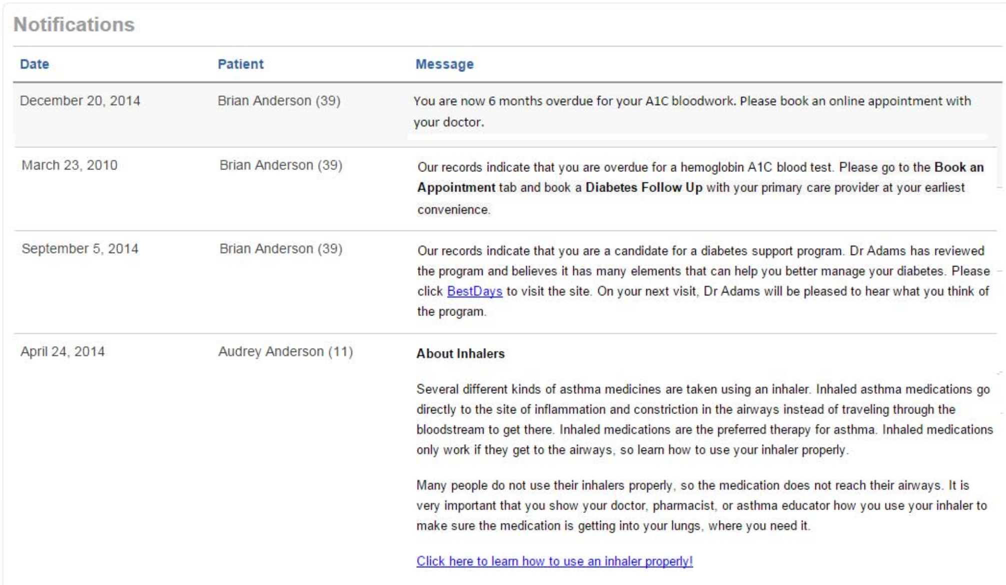

3. Perform one of the following actions:
   - To print the full report, click **Print** ().
   - To print only the page displayed, click **Print the current page** ().
   - To save the report to your computer, click **Export report and save it to the disk** ().
   - To view the report in its own browser window and view or print it from there, click **Export a report and show it in a new window** ().

## Notifications

In the **Notifications** area you can view any notifications sent from the clinic. The types of notifications you can receive include:

- Reminders that you are due for preventive care or disease management tests
- Reminders that you are due for follow up appointments

- Tips for managing your health



Notifications

| Date | Patient | Message |
|---|---|---|
| December 20, 2014 | Brian Anderson (39) | You are now 6 months overdue for your A1C bloodwork. Please book an online appointment with your doctor. |
| March 23, 2010 | Brian Anderson (39) | Our records indicate that you are overdue for a hemoglobin A1C blood test. Please go to the **Book an Appointment** tab and book a **Diabetes Follow Up** with your primary care provider at your earliest convenience. |
| September 5, 2014 | Brian Anderson (39) | Our records indicate that you are a candidate for a diabetes support program. Dr Adams has reviewed the program and believes it has many elements that can help you better manage your diabetes. Please click BestDays to visit the site. On your next visit, Dr Adams will be pleased to hear what you think of the program. |
| April 24, 2014 | Audrey Anderson (11) | **About Inhalers** Several different kinds of asthma medicines are taken using an inhaler. Inhaled asthma medications go directly to the site of inflammation and constriction in the airways instead of traveling through the bloodstream to get there. Inhaled medications are the preferred therapy for asthma. Inhaled medications only work if they get to the airways, so learn how to use your inhaler properly. Many people do not use their inhalers properly, so the medication does not reach their airways. It is very important that you show your doctor, pharmacist, or asthma educator how you use your inhaler to make sure the medication is getting into your lungs, where you need it. Click here to learn how to use an inhaler properly! |

# Booking appointments

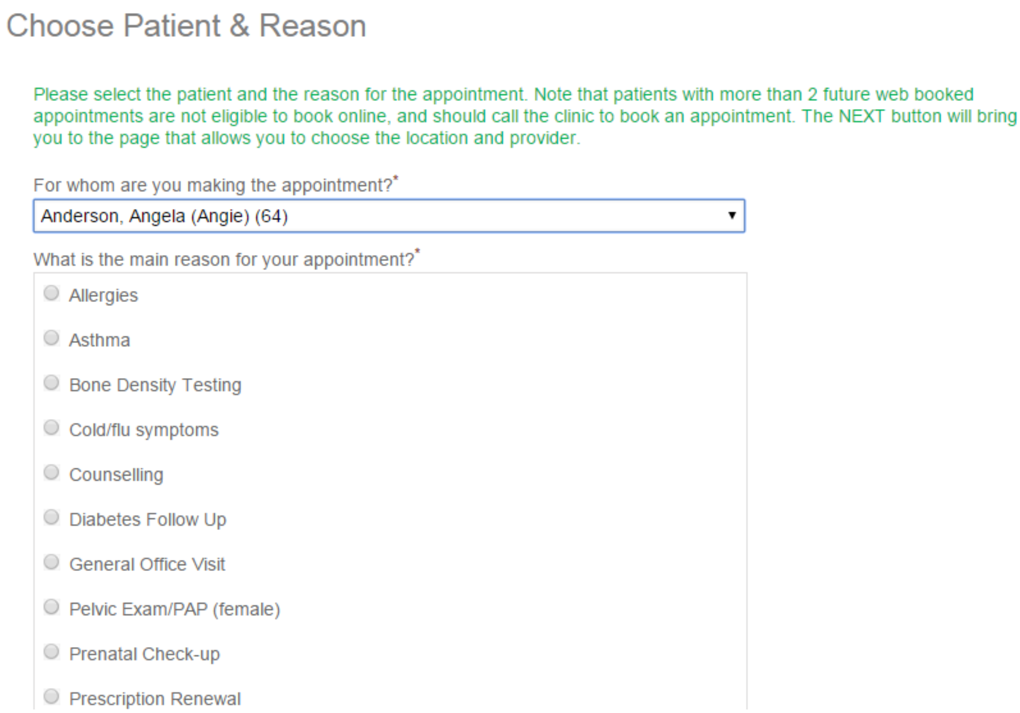
Through the patient portal you can book appointments with a provider.

## Steps

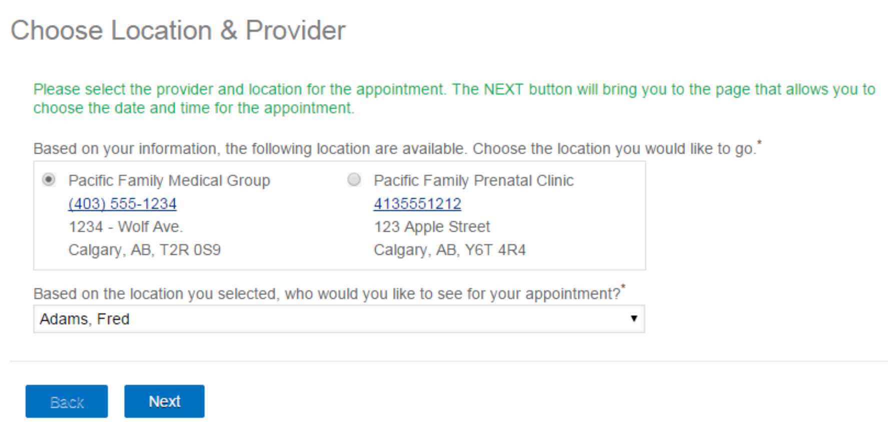
1. Log into the patient portal, and at the top of the window, click **Book an Appointment**.
2. If you have access to other patients' health information, in the **For whom are you making the appointment?** list, select the patient you want to book the appointment for. Select the reason for the appointment, and then click **Next**.

   **Tip:** The options available in the reason for appointment area are determined by the clinic. See "Enabling specific types of appointments to be booked online" on page

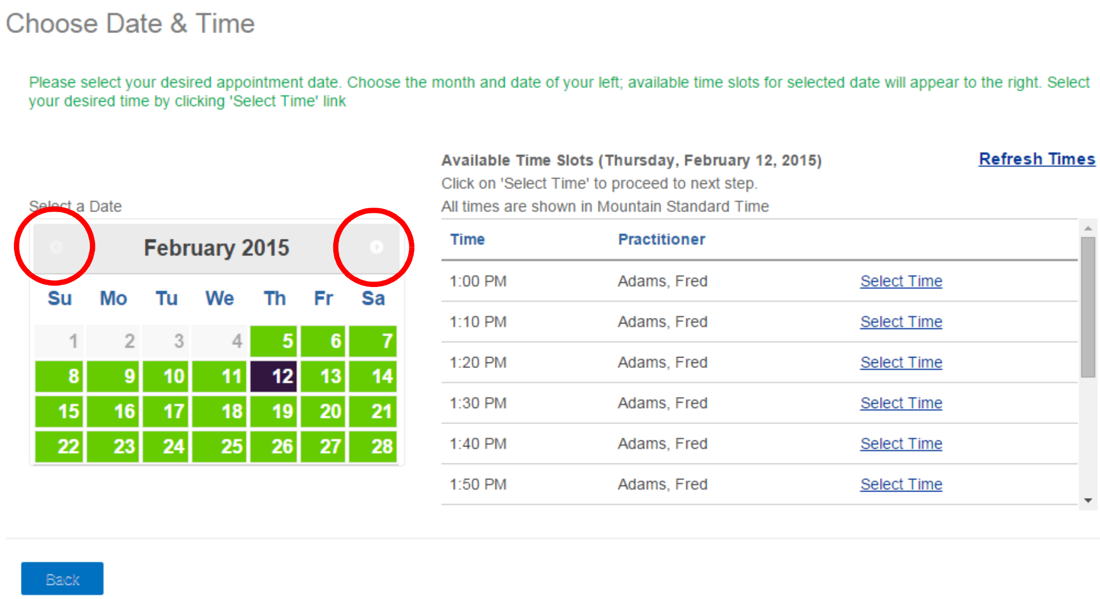
83.




3. If you have access to multiple clinic locations, click the location you want and, in the B**ased on the location you selected, who would you like to see for your appointment?** list, select the provider you want to book the appointment with and then click **Next**.

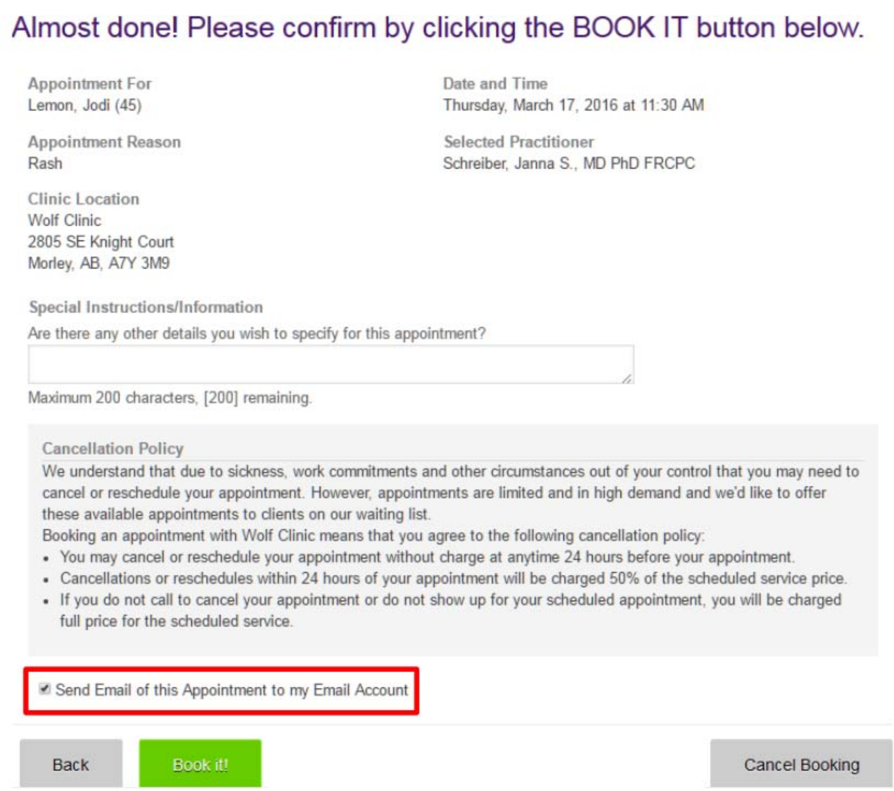


4. On the calendar, click the date when you want to book the appointment and to the right of the time slot you want, click **Select Time**.




**Tip:** To change the calendar month, use the arrows to move back or forward a month.

5. Review the details of the appointment. Make sure you review the clinic's cancellation policy. Pay special attention to important details such as cancellation or no-show charges.




6. In the **Are there any other details you wish to specify for this appointment?** field, type any additional appointment notes.
7. By default, the EMR sends you a confirmation email with your appointment details. If you do not want to receive an email, clear the **Send Email of this Appointment to my Email Account** check box.
8. Click **Book It!** The patient portal sends you a confirmation email containing your appointment details (unless you opted out of receiving an email).
9. To add the appointment to your email calendar, click **Add to Calendar**. This is compatible with most of the commonly used calendar applications, including Google calendar, Outlook, yahoo, Hotmail, and iCal (Mac).

# Canceling appointments

In the patient portal, you can view a list of your upcoming appointments. From your upcoming appointment list, you can choose to cancel an appointment.

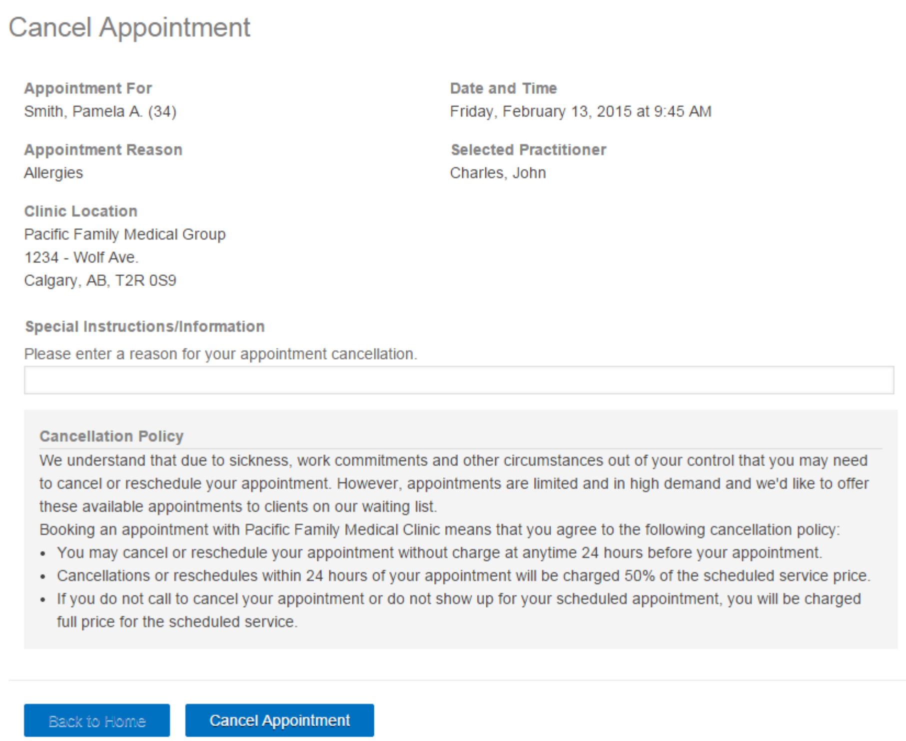
Before you cancel an appointment, review the clinic's cancellation policy. Pay special attention to important details such as cancellation or no-show charges.

### Steps

1. At the top of the patient portal page, click the **Upcoming Appointments** tab.

   **Tip:** If you are canceling an appointment for a patient other than yourself, you must first change to that patient's profile. Click the **Health information** tab and then, in the **Available Profiles** list, select the patient.

2. To the right of the appointment, click **Cancel**.


Cancel Appointment

Appointment For
Smith, Pamela A. (34)

Date and Time
Friday, February 13, 2015 at 9:45 AM

Appointment Reason
Allergies

Selected Practitioner
Charles, John

Clinic Location
Pacific Family Medical Group
1234 - Wolf Ave.
Calgary, AB, T2R 0S9

Special Instructions/Information
Please enter a reason for your appointment cancellation.

Cancellation Policy
We understand that due to sickness, work commitments and other circumstances out of your control that you may need to cancel or reschedule your appointment. However, appointments are limited and in high demand and we'd like to offer these available appointments to clients on our waiting list.
Booking an appointment with Pacific Family Medical Clinic means that you agree to the following cancellation policy:
- You may cancel or reschedule your appointment without charge at anytime 24 hours before your appointment.
- Cancellations or reschedules within 24 hours of your appointment will be charged 50% of the scheduled service price.
- If you do not call to cancel your appointment or do not show up for your scheduled appointment, you will be charged full price for the scheduled service.

Back to Home | Cancel Appointment

3. Review the details of the appointment you are canceling.

4. In the **Special Instructions/Information** area, type your reason for canceling the appointment.

5. Click **Cancel Appointment**. When prompted, click **Continue**. The Portal displays a dialog box with the following prompt:

# Sending and receiving messages

Clinic providers and staff can send you personalized messages via the patient portal. When you receive a message, you are notified by email. The email does not contain the message itself, instead the email prompts you to log in to the patient portal to view the message.

Depending on the clinic's processes, you may also be able to send a limited number of non-urgent messages to the clinic via the patient portal. If you are restricted to a certain number of messages, the patient portal indicates how many you can send over a defined period of time.

Once you reach your maximum allowed messages, you are unable to create a new message until the next time period.

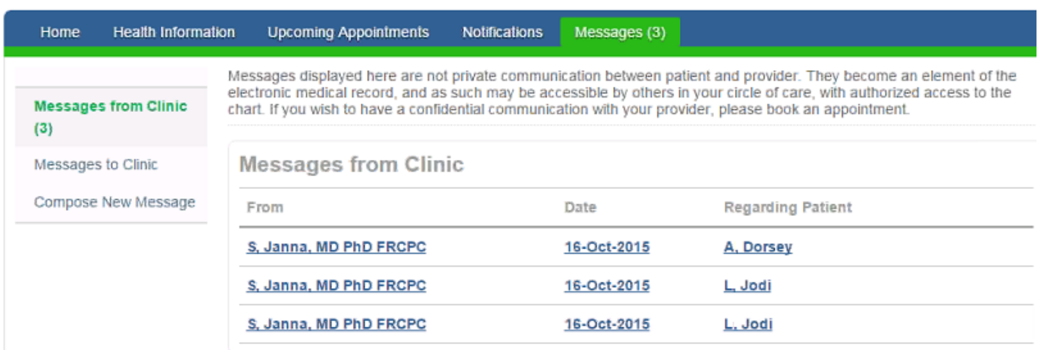
**Important:** For urgent matters, always contact the clinic by phone.

## Viewing messages

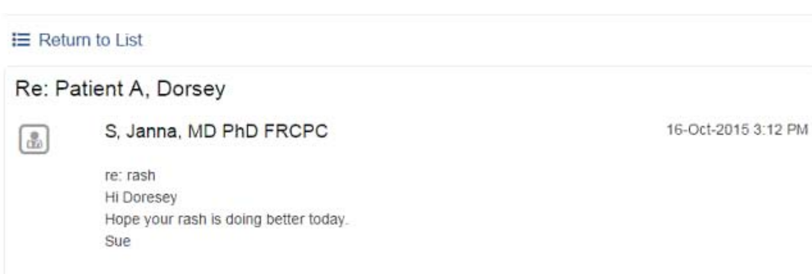
When you view a message in the patient portal, the clinic is notified that you viewed it. There may also be a **Reply** button if the sender requested you to reply through the portal.

### Steps

1. Log into the patient portal and on the home page, click the **Messages (#)** tab (where # = the number of messages you have).




2. In the list of messages, click the message you want to view. The patient portal displays the message contents, including who sent the message and the date it was sent.

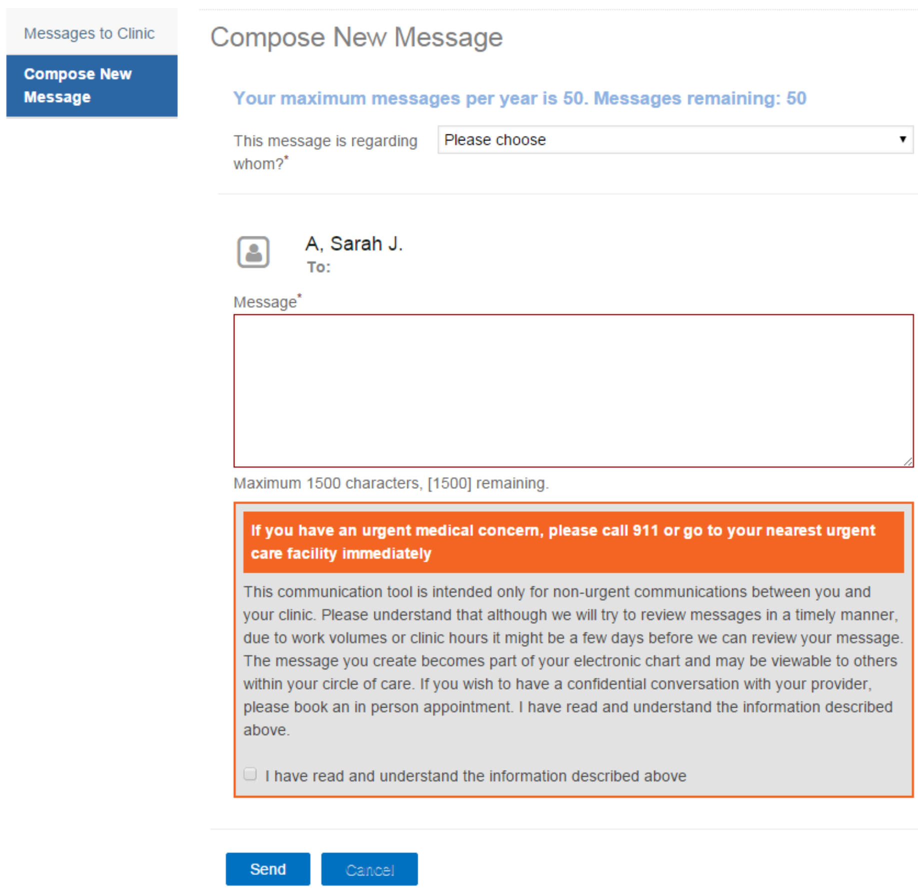


## Sending messages

If you have permissions from your medical clinic, you can send messages to them through the patient portal.

### Steps

1. At the top of the patient portal page, click the **Messages** tab.
2. In the left pane, click **Compose New Message**. The **Compose New Message** area indicates how many messages you can send.




3. In the This message is regarding whom? list, select the patient.
4. In the **Message** area, type your message.
5. Read the information displayed in the orange dialog area, and then select the **I have read and understand the information described above** check box.
6. Click **Send**.

# Managing your patient portal account

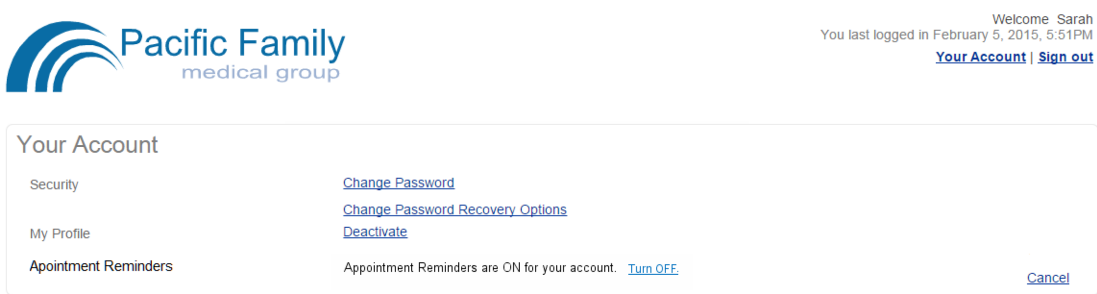
Through the **Your Account** page of the patient portal, you can:

- Change your password and set your password recover security questions: If you forget your password, you can answer a series of pre-configured questions to reset your password and regain access to your account. You can modify these password recovery questions at any time.
- Deactivate your account: If you leave the clinic, or if you want to stop online access to your health information for any reason, you can deactivate your patient portal account. When deactivating your account, you delete only your portal credentials. All of your patient data remains on the clinic's system.

  If you later change your mind, contact the clinic to reactivate your patient portal account.
- Turn on or turn off email notifications for appointment reminders

### Steps

1. In the top right of the patient portal, click **Your Account**.




2. To change your password:

   a) Next to **Security**, click **Change Password**.

   b) In the **Change Password** page, type your current and new password and click **Submit**.

   **Note:** Your password must include three of the following four requirements:
   Uppercase letter (A to Z)
   Lowercase letter (a to z)
   Number (0 to 9)
   Special character (such as ! @ # $).

3. To change your password recovery options:

   a) Next to **Security**, click **Change Password Recovery Options**.

   b) In one of the **Security Question** lists, click a question.

   c) In the **Security Answer** field, type the answer. and click **Submit**.

4. To deactivate your account, next to **My Profile** area, click **Deactivate**.
5. To turn on or off your appointment reminder notifications, next to **Appointment Reminders**, click **Turn OFF** or **Turn ON**.

Chapter 5

# Managing the patient portal (Administrators)



## Customizing the patient portal colour scheme

You can customize the colour scheme and logo of your clinic's patient portal. The patient portal comes with two pre-defined styles you can choose from:

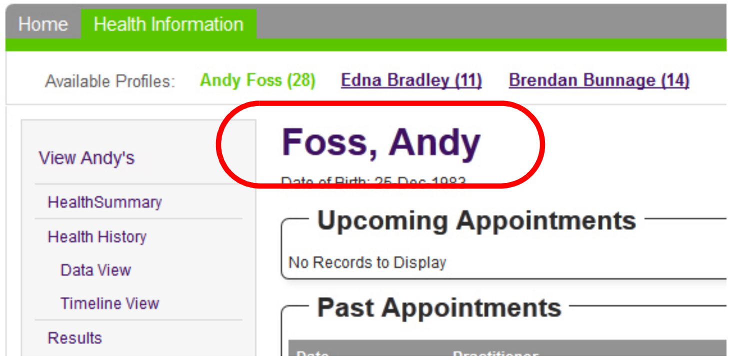
- Base Default: Has a blue/grey colour scheme
- TELUS Style: Has a green/purple colour scheme

You can also create your own colour scheme, to mimic the look and feel of your current clinic web site.

The following table describes the different colour settings you can customize.

| Item | Description |
| --- | --- |
| **Form Styling** | |

<table>
<tr>
<td>Title Color</td>
<td>Page title colour for all patient portal pages. In most cases, the page title is the patient's name.



</td>
</tr>
<tr>
<td>Description Color</td>
<td>Instructions to the user.

</td>
</tr>
</table>

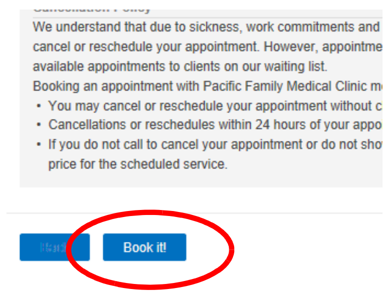
<table>
<tr>
<td>Primary Button Color<br><br>Primary Button Text<br><br>Default Button Color<br><br>Default Button Text</td>
<td>

Some patient portal pages contain buttons you can click to perform an action. For example, to confirm that you want to book an appointment, you click the **Book it** button.

If there are multiple buttons to choose from, one button is defined as the default button. It is the button that is clicked most often, and his highlighted by default.

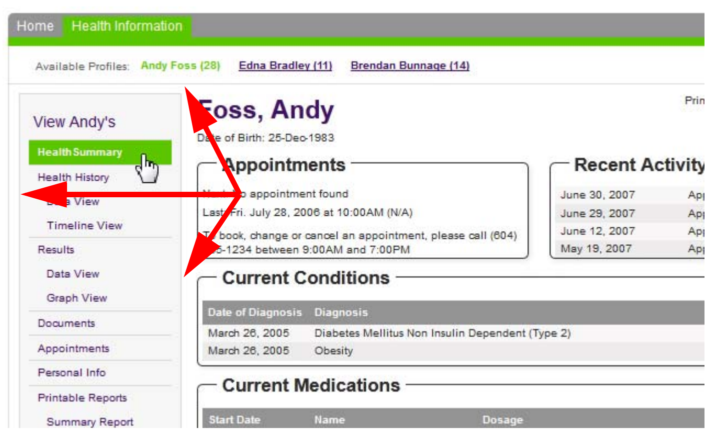
The default button displays with the **Default Button Color** as the background, and the **Default Button Text** as the text colour.

All other buttons display with the **Primary Button Color** as the background, and the **Primary Button Text** as the text colour.

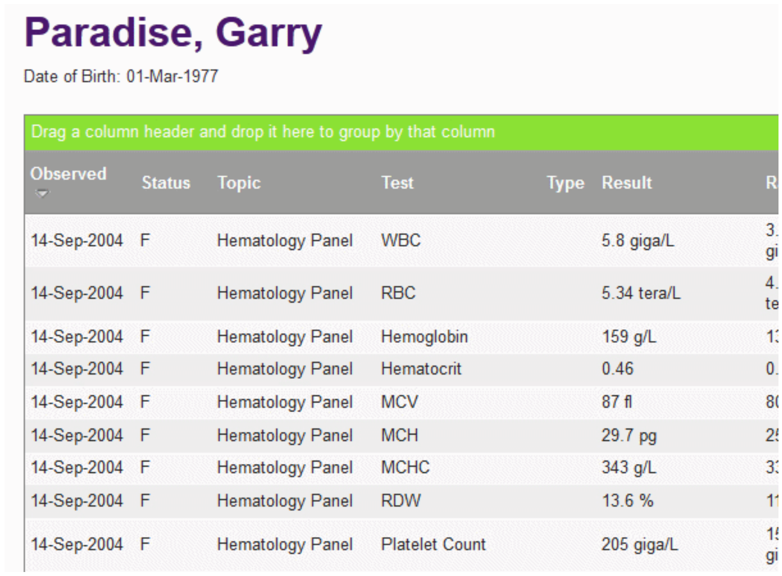


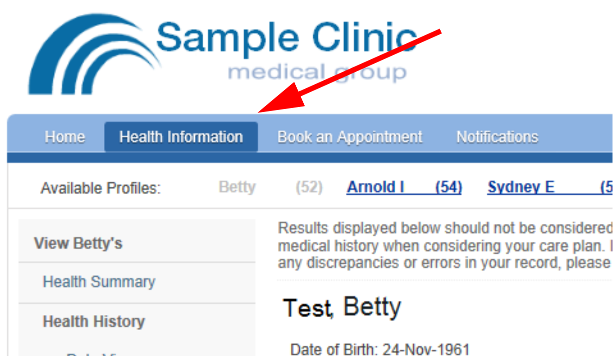

</td>
</tr>
<tr>
<td>Border</td>
<td>

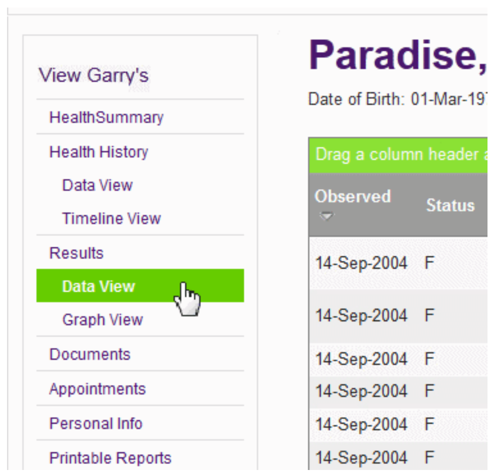
Defines the border colour outlining the patient portal pages.




</td>
</tr>
<tr>
<td colspan="2">Tables</td>
</tr>
</table>

<table>
<tr>
<td>Header Background Color<br><br>Header Text Color<br><br>Row Band Color<br><br>Row Alternate Band Color</td>
<td>For portal pages that contain information in a table, such as lab results, you can configure the colour and background of the header.<br><br>You can distinguish rows by alternating background colours.<br><br>
</td>
</tr>
<tr>
<td colspan="2">Call to Action Banner</td>
</tr>
<tr>
<td>Text Color<br><br>Background Color</td>
<td>The Call to Action Banner appears near the top of the patient portal to provide notifications to patients, such as:<br><br>■ They can now perform an action (for example, if they can start a scheduled video conference)<br><br>■ They performed an action incorrectly (for example, if they entered the wrong user name and password)<br><br>
</td>
</tr>
<tr>
<td colspan="2">Main Horizontal Tab</td>
</tr>
</table>

<table>
<tr><td>Main Tab Color<br><br>Main Tab Active Color<br><br>Main Tab Text Color</td><td>In the horizontal menu at the top of all patient portal pages, the clickable tabs have the Main Tab Color as background colour, and the Main Tab Text Color as text colour.<br><br>Once you click a tab, the background colour of the tab changes to the Main Tab Active Color.<br><br>


</td></tr>
<tr><td>Use Folder Tab</td><td>Select to have tabs at the top of the patient portal (Home, Health Information, etc.) display in a file folder-like format instead of as simple buttons.</td></tr>
<tr><td colspan="2">Side Panel</td></tr>
<tr><td>Active Color<br><br>Active Text Color</td><td>When you click the menu on the left side of the patient portal, the selected item highlights with the Active Color, and the item's text changes to the Active Text Color.<br><br>


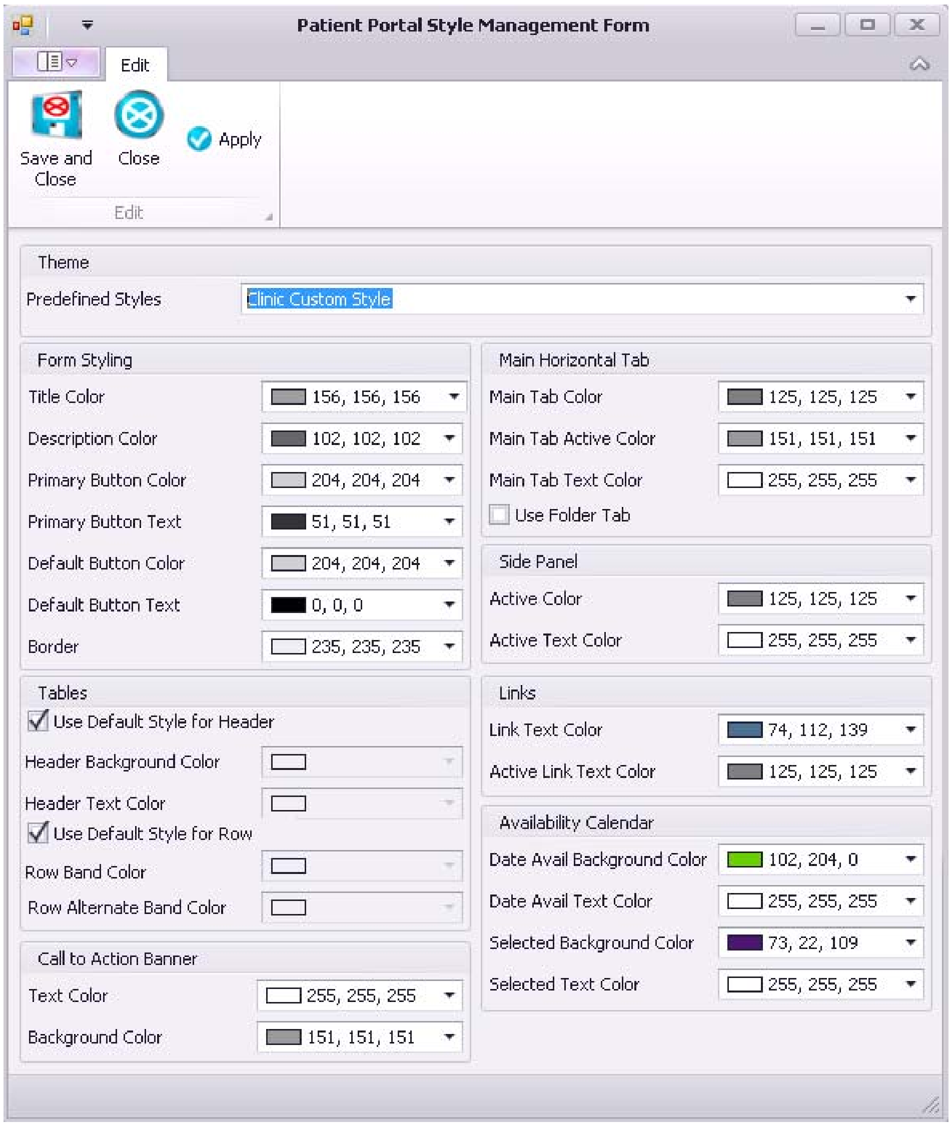
</td></tr>
<tr><td colspan="2">Links</td></tr>
</table>

<table>
<tr><td>Link Text Color</td><td>Links on the patient portal are displayed in the Link Text Color.</td></tr>
<tr><td>Active Link Text Color</td><td>Once you a link, the link text changes to the Active Link Text Color.<br><br><br>Active link text (currently selected)<br>Link text</td></tr>
<tr><td colspan="2">Availability Calendar</td></tr>
<tr><td>Date Avail Background Color<br><br>Date Avail Text Color<br><br>Selected Background Color<br><br>Selected Text Color</td><td>When a patient books an appointment, they choose a date from a clickable calendar.<br><br></td></tr>
</table>

### Steps

1. From the Wolf EMR **Home** tab, click the **Maintenance** tab.

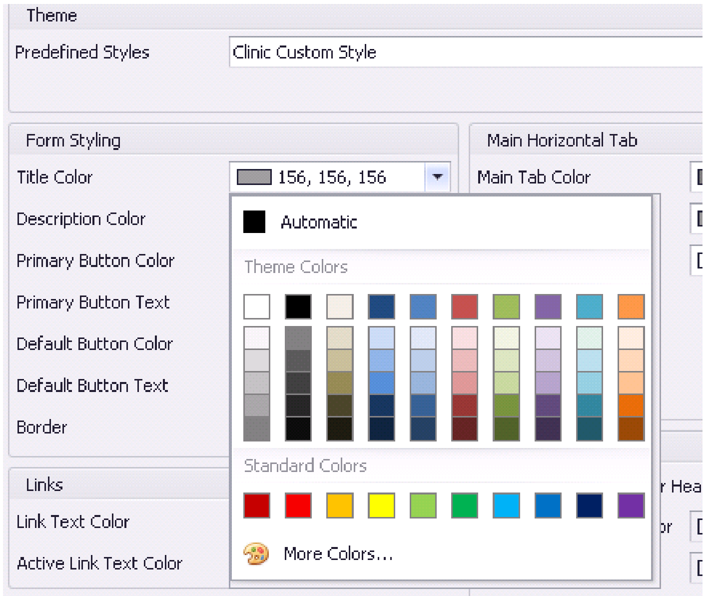
2. Within the **Patient Portal** area, click **Configure Web Style** (). The **Patient Portal Style Management Form** window opens.




3. Under **Theme**, in the **Predefined Styles** list, complete one of the following actions:
   - To customize the colour scheme of your clinic's patient portal, select **Clinic Custom Style**.
   - To use a pre-defined colour scheme, select **Base Default** (for grey/blue colours), or **TELUS Style** (for green/purple colours).

     **Note:** You cannot alter the colour schemes for the **Base Default** and **Telus Style** predefined styles.
4. If you are customizing your colour scheme, select appropriate colours for each area.

a) Click the drop-down list to the right of the item you want to change and click the colour you want.




b) If the colour you want is not displayed, or to specify an exact colour, click **More Colors** and specify your new colour code.

**Tip:** If you want to mimic the colour scheme of your clinic's website or logo, you can determine HEX colour codes for your colours using one of many free applications available online (such as ICONICO's ColorPic application: [http://www.iconico.com/colorpic](http://www.iconico.com/colorpic) ).

5. When you are finished, complete one of the following actions:

- To apply your changes to the patient portal and leave the window open, click Apply ( ).
- To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
- To close the window without saving your changes, click **Close** ( ).

## Adding your clinic's logo to the patient portal

You can further customize the patient portal to contain your clinic's logo. You can add your clinic's logo to:

- The top of the patient portal web site
- The header of reports printed from the patient portal

For optimal image quality, use only .jpg or .png images and size your clinic logo to be 250 pixels wide x 100 pixels high.

You must save your logo image file on your Data Center remote desktop before you can import it into Wolf EMR. Copy and paste the image file from your local computer to the remote desktop.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.

2. In the **Patient Portal** area, click **Configure Web Content** (  ).The **Patient Portal Content and Configuration Form** window opens.


3. In the left column, click **Portal Logos**.

4. To add your logo to your patient portal site header:

   a) Under **Header Logo**, click **Change Header Logo**. The EMR displays a file search window.

   b) Find your logo image file, and then click **Open**. The EMR displays a sample of your logo.

5. To add your logo to reports printed from the patient portal:

   a) Under **Report Logo**, click **Change Report Logo**. The EMR displays a file search window.

   b) Find your logo image file, and then click **Open**. The EMR displays a sample of your logo.

6. Perform one of the following actions:

- To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
- To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
- To close the window without saving your changes, click **Close** ( ).

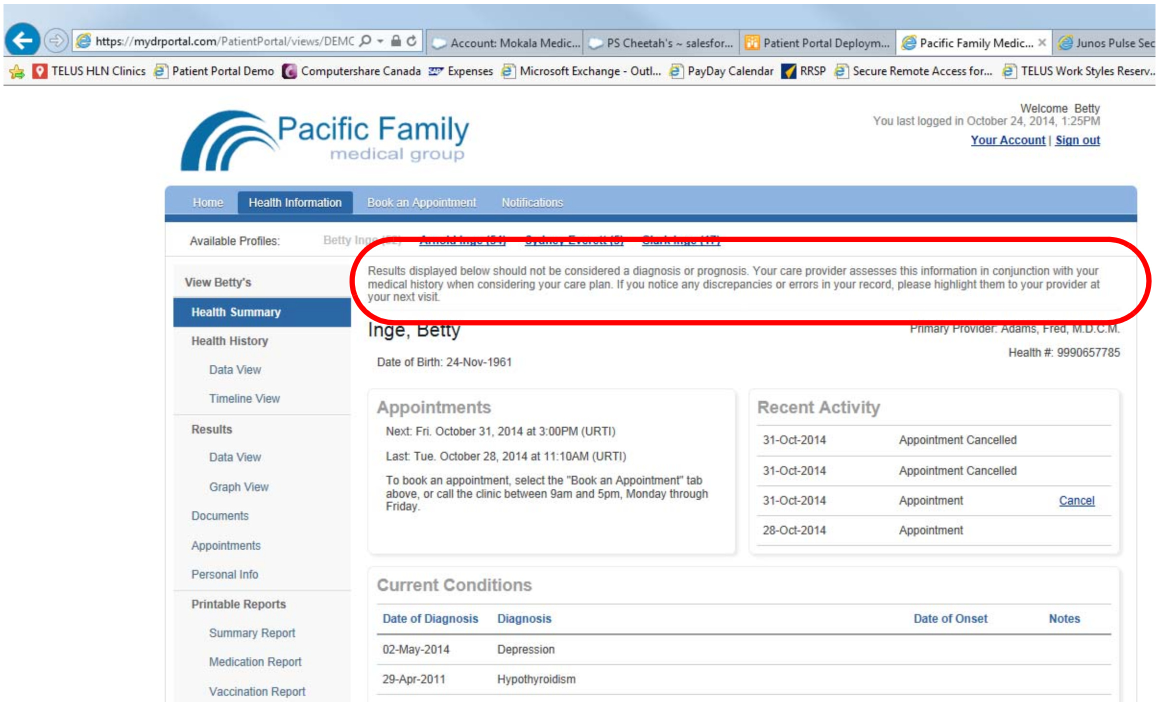
# Customizing your patient portal web page content

During the patient portal implementation process you are asked to complete the **Wolf EMR patient portal Configuration Questionnaire**. In the questionnaire you are asked to review the default patient portal web page content and to provide feedback on changes you want. Prior to implementation, the TELUS Health team configures your patient portal to reflect your changes.

If you later want to make changes to your legal messages, you can change them on the patient portal Content and Configuration Form window.

## Customizing legal messages

When a patient views their health information in the patient portal, a legal message displays at the top of each page. For example, the **Health Summary** page may state the following legal message: "Results displayed below should not be considered a diagnosis or prognosis. Your care provider assesses this information in conjunction with your medical history when considering your care plan. If you notice any discrepancies or errors in your record, please highlight them to your provider at your next visit."




The patient portal contains default legal messages; however you can modify your legal messages at any time. The following page sect ions of the **Health Information** tab have unique, customizable legal messages:

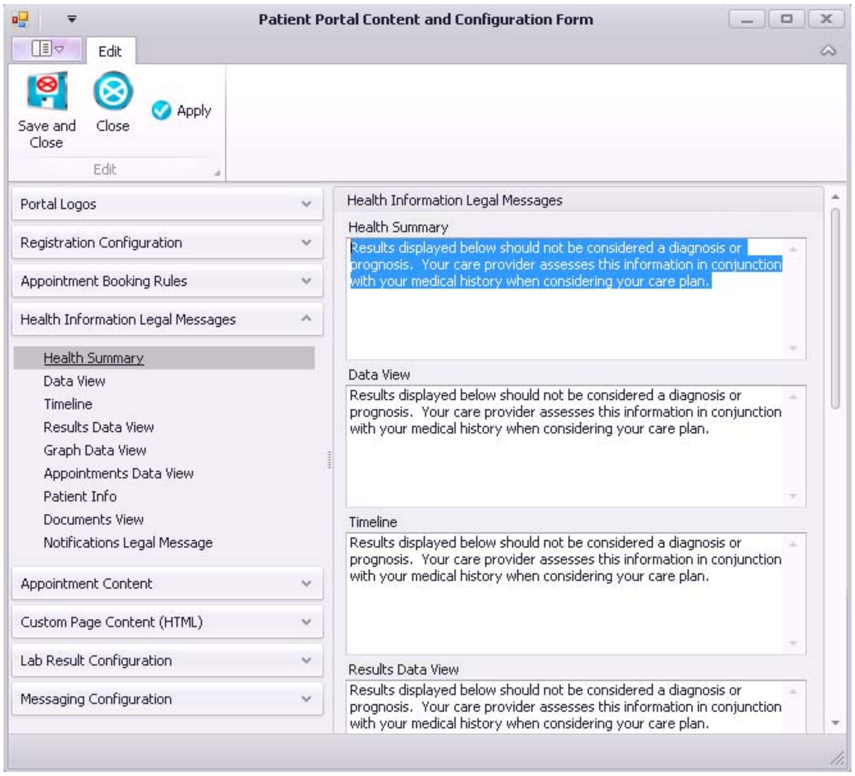
- Health Summary
- Health History – Data View
- Health History – Timeline
- Results – Data View
- Results – Graph View
- Documents
- Appointments
- Personal Info
- Notifications

## Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.

2. In the **Patient Portal** area, click **Configure Web Content** (  ).The **Patient Portal Content and Configuration Form** window opens.

3. In the left column, click **Health Information Legal Messages**. The EMR expands the menu to display a list of pages that contain legal messages.
4. In the list of pages, click the page you want to edit the legal message for. The EMR displays all current legal messages on the right side of the window, with the selected page's legal message highlighted.




5. Edit the legal message as needed. You can review and modify all your legal messages at once by scrolling down.
6. Perform one of the following actions:

- To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
- To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
- To close the window without saving your changes, click **Close** ( ).

## Customizing the Frequently Asked Questions page

The Frequently Asked Questions (FAQ) patient portal page assists patients with navigating and using the portal. All portal pages have a link to the FAQ.

As more of your patients use your patient portal, you may find that new questions and answers need to be added, or that currently available questions and answers need to be modified. For this reason, you can add to or modify your FAQ page.

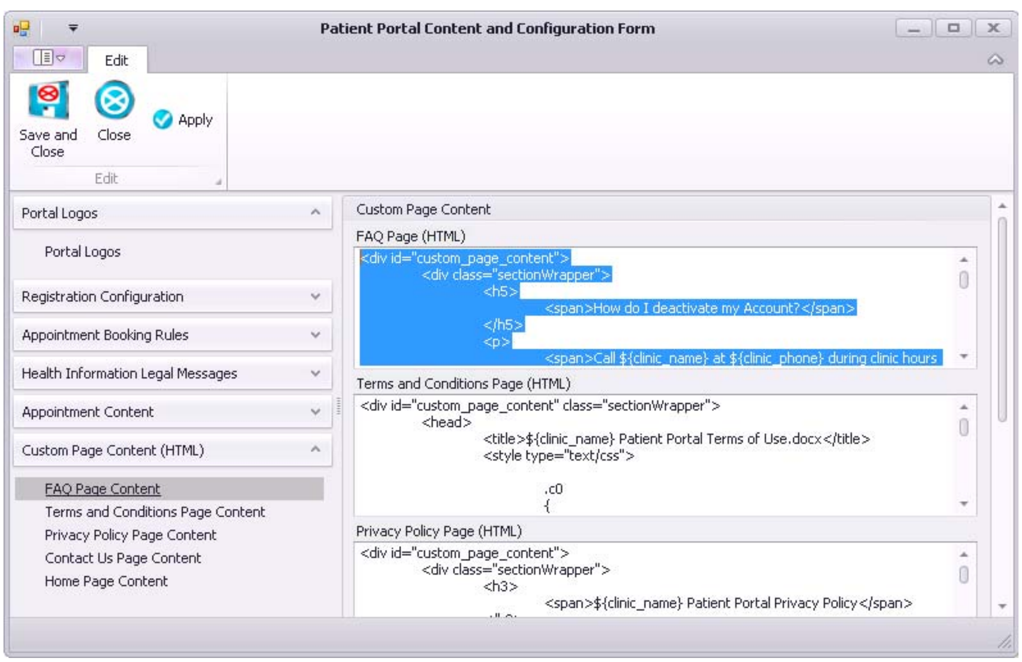
To add or edit the FAQ content, you must edit the HTML code that appears on your patient portal.

**Note:** If you are not knowledgeable in HTML, avoid changing HTML text you do not understand. To request that TELUS Health add, modify, or delete content for you, contact the Wolf EMR support team.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** (  ).The **Patient Portal Content and Configuration Form** window opens.
3. In the left column, click **Custom Page Content (HTML)**.

   The EMR expands the menu to display a list of configurable patient portal pages.
4. In the list of configurable pages, click **FAQ Page Content**. The EMR displays all **Custom Page Content** items on the right side of the window with the **FAQ Page (HTML)** area highlighted.



The **FAQ Page Content** area displays HTML code similar to the following:

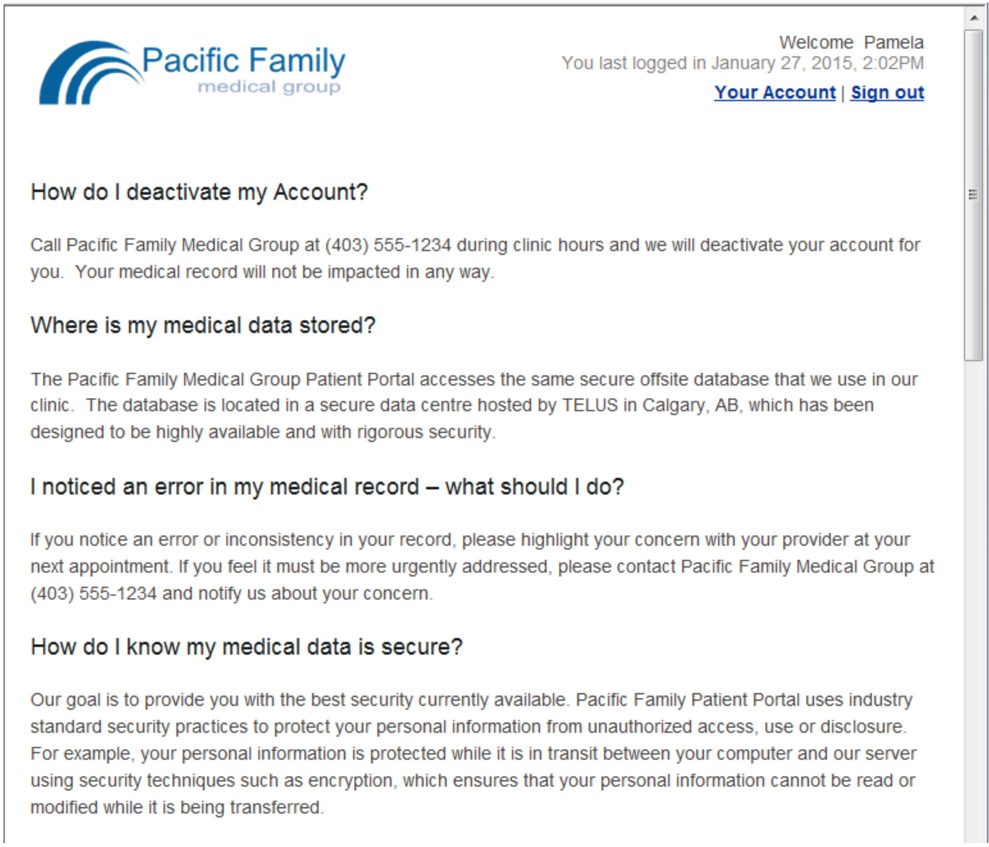
```
<div id=”custom_page_content”>
    <div class=”sectionWrapper”>
        <h5>
            <span>How do I deactivate my Account?</span>
        </h5>
        <p>
            <span>Call ${clinic_name} at ${clinic_phone} during clinic
            hours and we will deactivate your account for you.  Your
            medical record will not be impacted in any way.</span>
        </p>
        <h5>
            <span>Where is my medical data stored?</span>
        </h5>
        <p>
            <span>The ${clinic_name} patient portal accesses the same
            secure offsite database that we use in our clinic.  The
            database is located in a secure data centre hosted by TELUS
            in Calgary, AB, which has been designed to be highly
            available and with rigorous security.</span>
        </p>
        <h5>
```

Question

Answer

- HTML text that begins with <span> and ends with </span> represents text you see on the page.
- HTML text that is preceded with an <h5> line and followed by an </h5> line displays as a header (question) on the page.
- HTML text that is preceded with an <p> line and followed by an </p> line displays as the paragraph content (answer) on the page.
- HTML text with the format ${item} is information that the page pulls from your EMR automatically. For example, ${clinic_phone} tells the page to pull your clinic phone number from your EMR. If you change your clinic phone number in Wolf EMR Configuration, the page then reflects the change automatically. **CAUTION:** avoid editing these items.

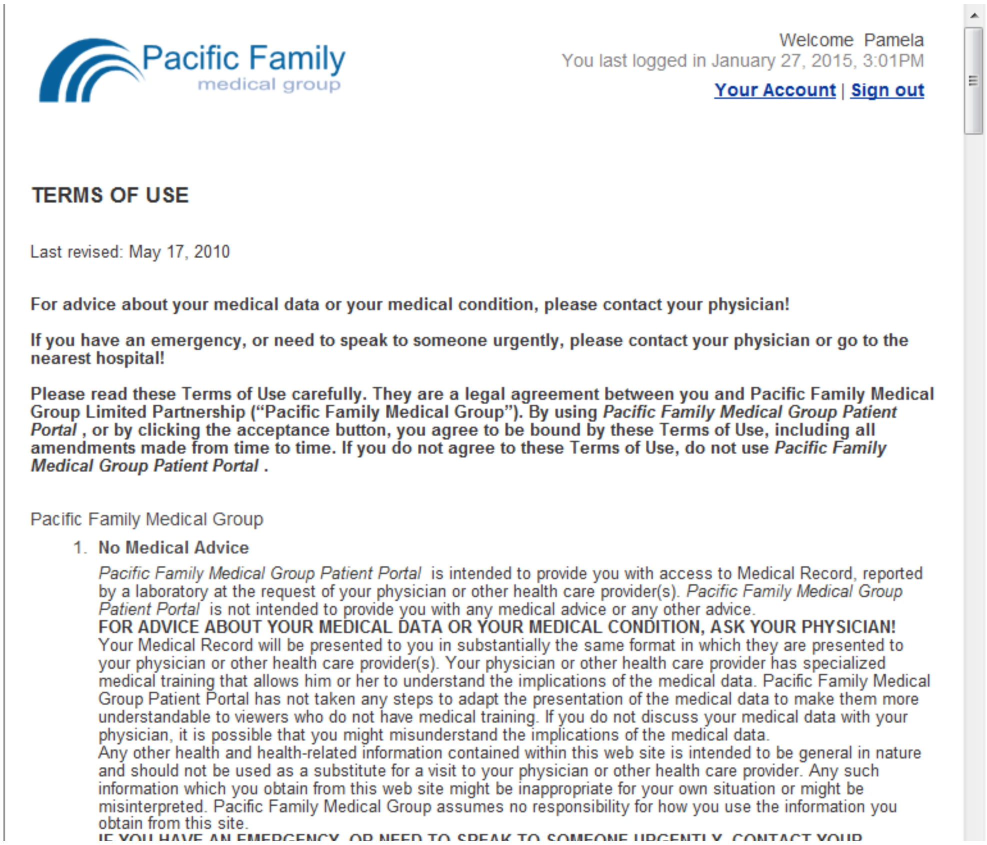
This is how the FAQ appears on the patient portal:




5. To modify a question on the FAQ page, edit the text within <h5><span> and </h5></span>.
6. To modify an answer on the FAQ page:, edit the text within <p><span> and </span></p>.
7. To add a question to the FAQ page, copy an existing question and answer (from <h5><span> to </span></p>) to where you want the new question, and edit the text as needed.
8. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Customize the Terms and Conditions page

The **Terms of Use** page describes the terms and conditions patients must agree to in order to use the patient portal.


Pacific Family medical group

Welcome Pamela
You last logged in January 27, 2015, 3:01PM
Your Account | Sign out

TERMS OF USE

Last revised: May 17, 2010

**For advice about your medical data or your medical condition, please contact your physician!**

**If you have an emergency, or need to speak to someone urgently, please contact your physician or go to the nearest hospital!**

**Please read these Terms of Use carefully. They are a legal agreement between you and Pacific Family Medical Group Limited Partnership ("Pacific Family Medical Group"). By using *Pacific Family Medical Group Patient Portal* , or by clicking the acceptance button, you agree to be bound by these Terms of Use, including all amendments made from time to time. If you do not agree to these Terms of Use, do not use *Pacific Family Medical Group Patient Portal* .**

Pacific Family Medical Group

1. **No Medical Advice**

   *Pacific Family Medical Group Patient Portal* is intended to provide you with access to Medical Record, reported by a laboratory at the request of your physician or other health care provider(s). *Pacific Family Medical Group Patient Portal* is not intended to provide you with any medical advice or any other advice.
   **FOR ADVICE ABOUT YOUR MEDICAL DATA OR YOUR MEDICAL CONDITION, ASK YOUR PHYSICIAN!**
   Your Medical Record will be presented to you in substantially the same format in which they are presented to your physician or other health care provider(s). Your physician or other health care provider has specialized medical training that allows him or her to understand the implications of the medical data. Pacific Family Medical Group Patient Portal has not taken any steps to adapt the presentation of the medical data to make them more understandable to viewers who do not have medical training. If you do not discuss your medical data with your physician, it is possible that you might misunderstand the implications of the medical data.
   Any other health and health-related information contained within this web site is intended to be general in nature and should not be used as a substitute for a visit to your physician or other health care provider. Any such information which you obtain from this web site might be inappropriate for your own situation or might be misinterpreted. Pacific Family Medical Group assumes no responsibility for how you use the information you obtain from this site.

Your patient portal is implemented with a minimum set of terms and conditions, with additional terms and conditions added at the request of your clinic during the implementation process.

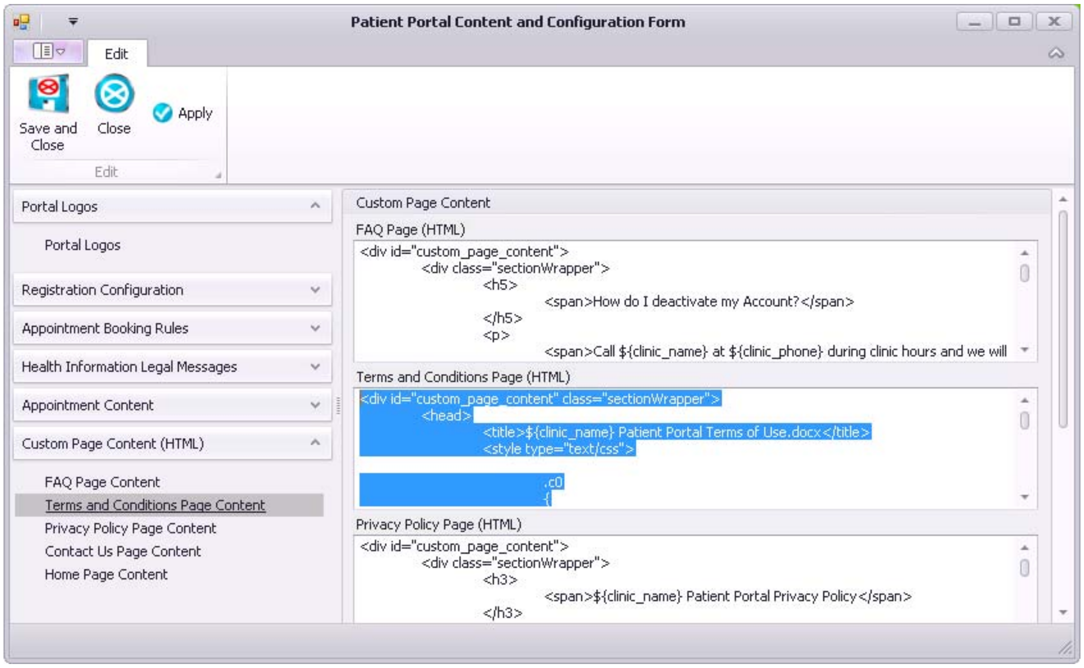
If you later decide to add additional terms and conditions, you can either modify the Terms and Conditions page yourself (if you know HTML), or you can send a request to the TELUS Health team to make the changes for you.

**Note:** If you are not knowledgeable in HTML, avoid changing HTML text you do not understand. To request that TELUS Health add, modify, or delete content for you, contact the Wolf EMR support team.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** ( ).The **Patient Portal Content and Configuration Form** window opens.

3. In the left column, click **Custom Page Content (HTML)** > **Terms and Conditions Page Content**.



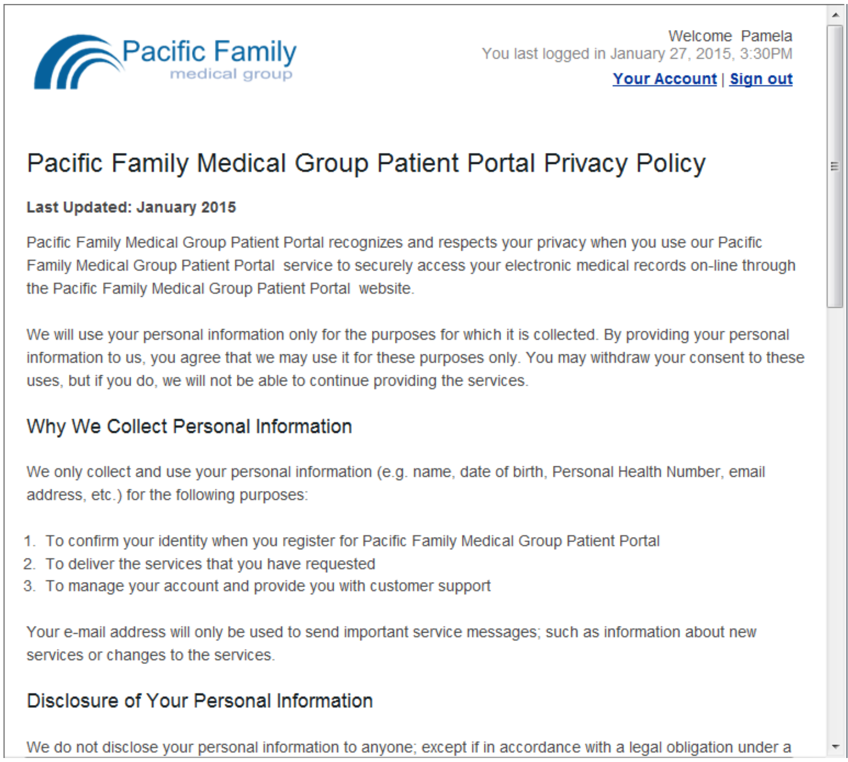

The **Terms and Conditions Page** area displays the page's content in HTML. Various paragraphs and lines of the terms of use content are preceded by HTML defining the paragraph's or line's font and formatting.

4. In HTML format, enter additional terms and conditions as needed.
5. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Customize the Privacy Policy page

Your clinic is responsible for developing and upholding an appropriate patient portal privacy policy for your patients.

Your patients can easily access this policy through the **Privacy Policy** link located at the bottom of each page of the portal.



Pacific Family
medical group

Welcome Pamela
You last logged in January 27, 2015, 3:30PM
Your Account | Sign out

## Pacific Family Medical Group Patient Portal Privacy Policy

**Last Updated: January 2015**

Pacific Family Medical Group Patient Portal recognizes and respects your privacy when you use our Pacific Family Medical Group Patient Portal service to securely access your electronic medical records on-line through the Pacific Family Medical Group Patient Portal website.

We will use your personal information only for the purposes for which it is collected. By providing your personal information to us, you agree that we may use it for these purposes only. You may withdraw your consent to these uses, but if you do, we will not be able to continue providing the services.

### Why We Collect Personal Information

We only collect and use your personal information (e.g. name, date of birth, Personal Health Number, email address, etc.) for the following purposes:

1. To confirm your identity when you register for Pacific Family Medical Group Patient Portal
2. To deliver the services that you have requested
3. To manage your account and provide you with customer support

Your e-mail address will only be used to send important service messages; such as information about new services or changes to the services.

### Disclosure of Your Personal Information

We do not disclose your personal information to anyone; except if in accordance with a legal obligation under a

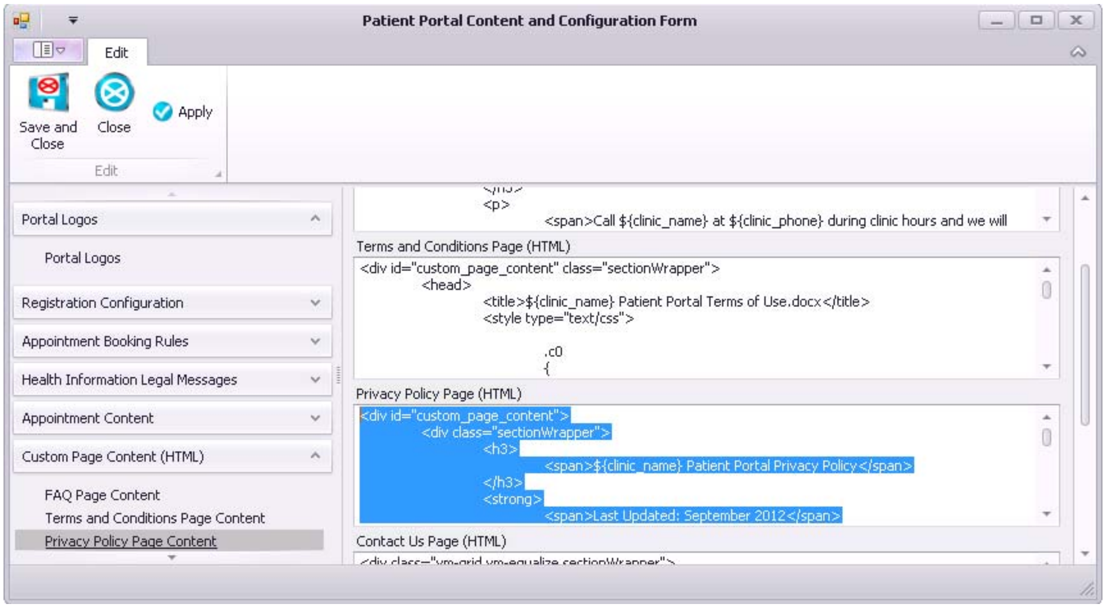
Your patient portal is implemented with a privacy policy initially provided by your clinic. You can later decide to add or modify it.

**Note:** If you are not knowledgeable in HTML, avoid changing HTML text you do not understand. To request that TELUS Health add, modify, or delete content for you, contact the Wolf EMR support team.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** ( ).The **Patient Portal Content and Configuration Form** window opens.

3. In the left column, click **Custom Page Content (HTML)** > **Privacy Policy Page Content**.




The **Privacy Policy Page** area displays the page's content in HTML. Various paragraphs and lines of the content are preceded by HTML defining the paragraph's or line's font and formatting.

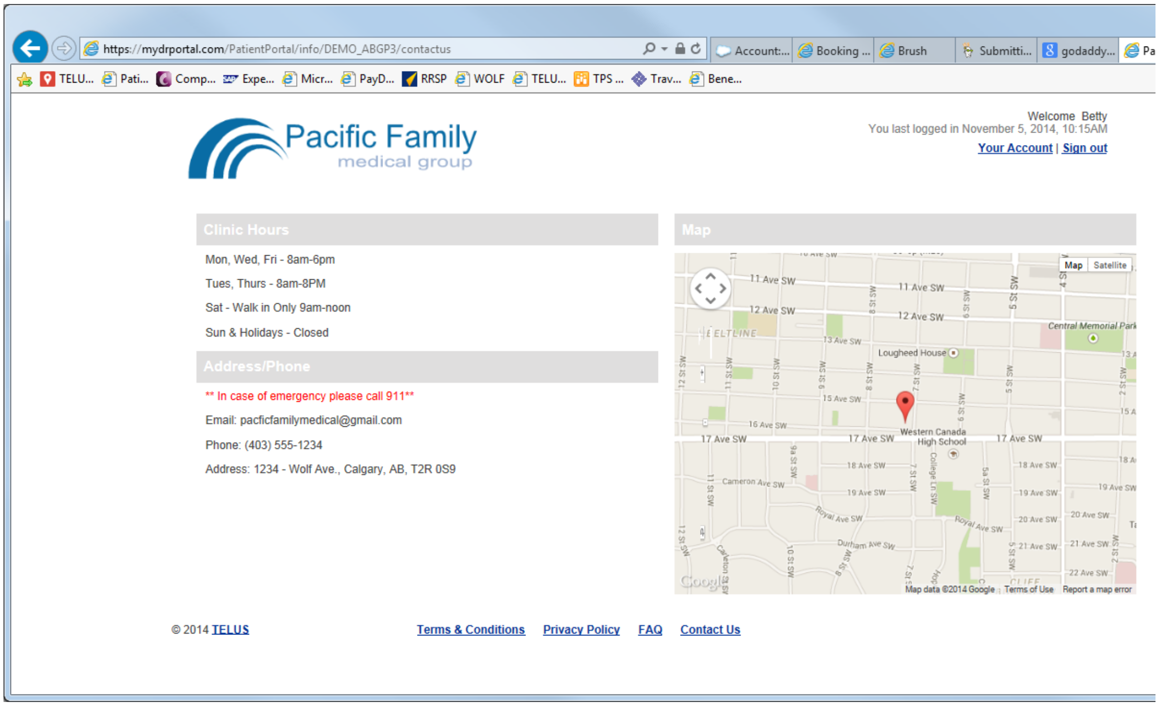
4. In HTML format, modify or enter additional items as needed.
5. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Customizing the Contact Us page

The patient portal **Contact Us** page displays your clinic's:

- Clinic hours
- Email (if applicable)
- Phone number
- Address

- Google map of your location




Your patient portal is implemented with your clinic hours, address, contact information, and any other contact notes already set. You can update this information on the patient portal as needed.

The patient portal pulls your clinic's address, phone number, and email from your Wolf EMR Configuration window. If you move locations, add an email, or change your phone number, you can modify your clinic contact information in your EMR (**Configuration** > **Clinic Address/ Phon**e tab). The patient portal then updates your contact information and Google Map automatically.

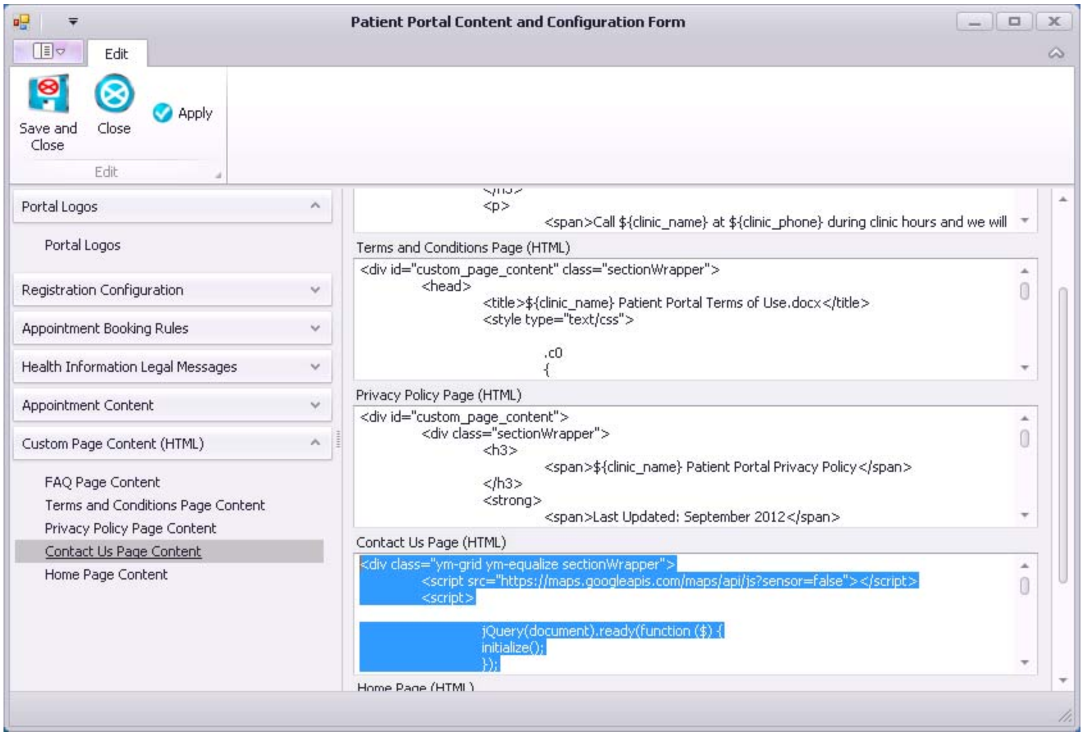
If you change your clinic hours, you must update the **Contact Us** portal page directly.

**Note:** If you are not knowledgeable in HTML, avoid changing HTML text you do not understand. To request that TELUS Health add, modify, or delete content for you, contact the Wolf EMR support team.

## Steps

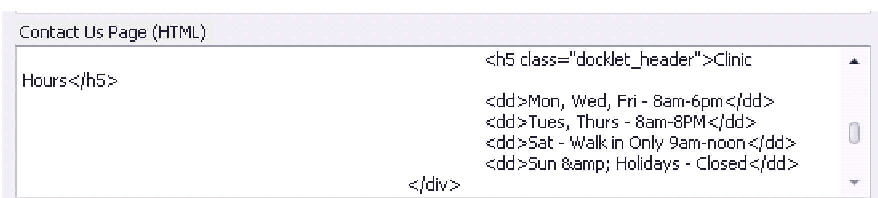
1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** (  ).

3. In the left column, click **Custom Page Content (HTML)** > **Contact Us Page Content**.




The **Contact Us Page** area displays the page's content in HTML.

4. To locate your clinic hours, scroll down the HTML text. Your clinic hours display similar to the below example, with each line of your clinic hours preceded by the text <dd> and followed by the text </dd>.

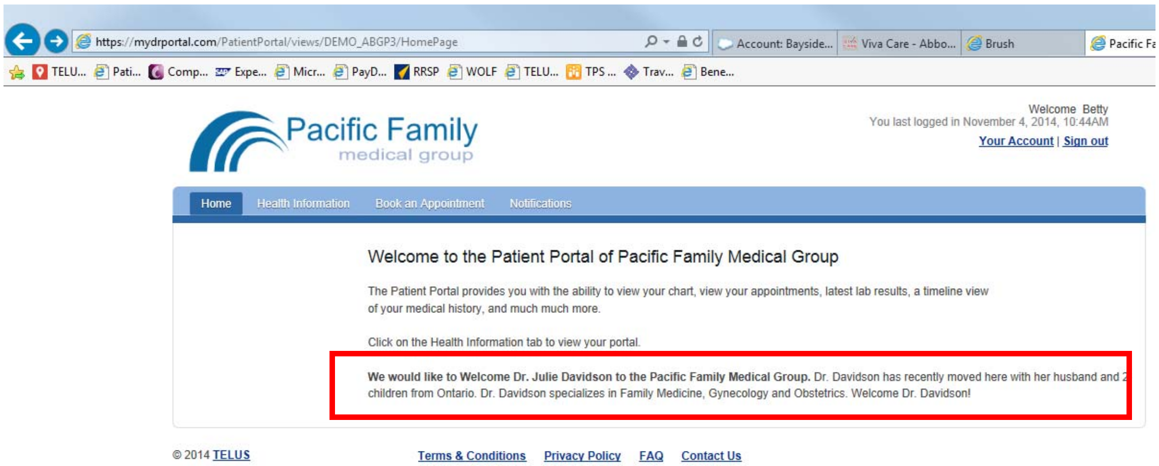



5. Modify the text of each line of your clinic hours (between <dd> and </dd>) as needed.
6. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Customizing the Home page

The **Home Page** is the first page your patients see every time they log into the patient portal. It provides a brief overview of the information available to patients on the portal. It can also act as an “announcement board” for general clinic communications to patients.

The below example demonstrates how the home page can provide customized clinic announcements.



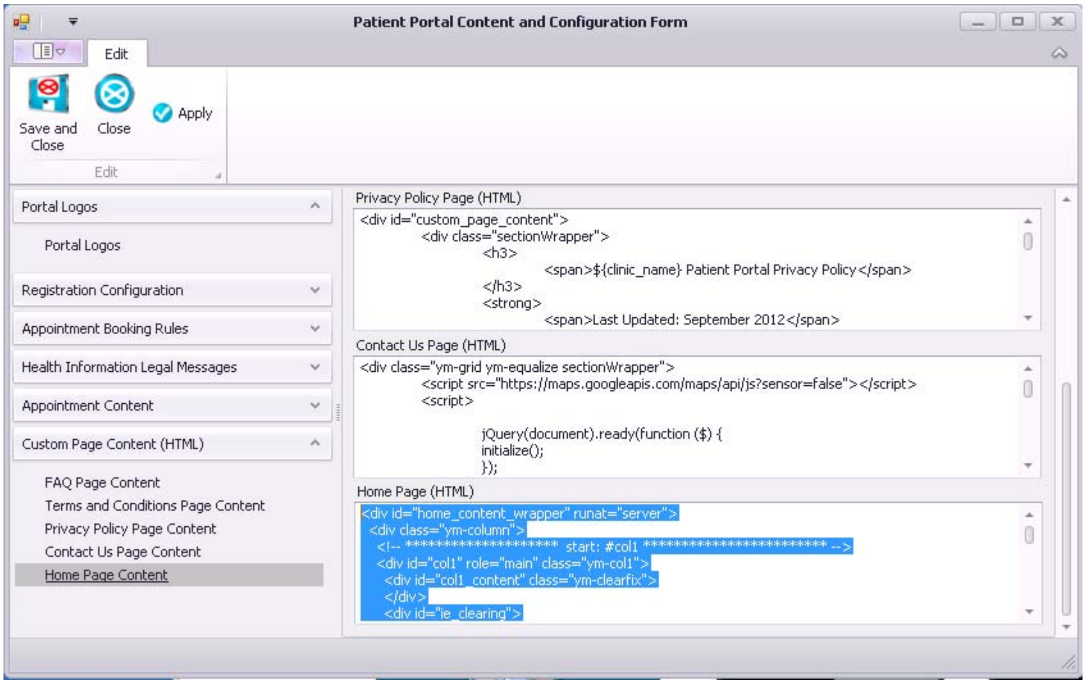

**Note:** If you are not knowledgeable in HTML, avoid changing HTML text you do not understand. To request that TELUS Health add, modify, or delete content for you, contact the Wolf EMR support team.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.

2. In the **Patient Portal** area, click **Configure Web Content** (  ).

3. In the left column, click **Custom Page Content (HTML)** > **Home Page Content**.




The **Home Page** area displays the page's content in HTML.

4. In HTML format, modify or enter additional Home Page content as needed.
5. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Configuring online appointment booking

Through the patient portal, your patients can book appointments online. When a patient books an appointment online, the provider's Wolf EMR appointment scheduler is updated immediately with the new appointment.

The online appointment booking tool is configurable, enabling you to customize online booking to meet the needs and comfort level of your clinic. Your clinic can configure:

- How many appointments each patient can book online.
- How many online appointments a patient can book for a specific day.

- Whether to send appointment reminders by email
- How soon and how far in advance patients can book appointments online.
- Which of your providers can receive online appointment bookings.
- What time slots can and cannot be booked online.
- What types of appointments can be booked online.

## Setting clinic-wide online appointment booking rules and email reminders

You can configure how many appointments each patient can book online for a particular provider and per day.

You can also automatically send appointment reminders to patients for upcoming reminders. Patients can always choose to opt out of receiving these reminders (within their **My Account** patient portal account settings), for example, if they have a weekly appointment with you. Patients receive an email with the following text:

Subject for advanced: Reminder - Appointment at <ClinicName>

Subject for imminent reminders: Final Reminder - Appointment at <ClinicName>

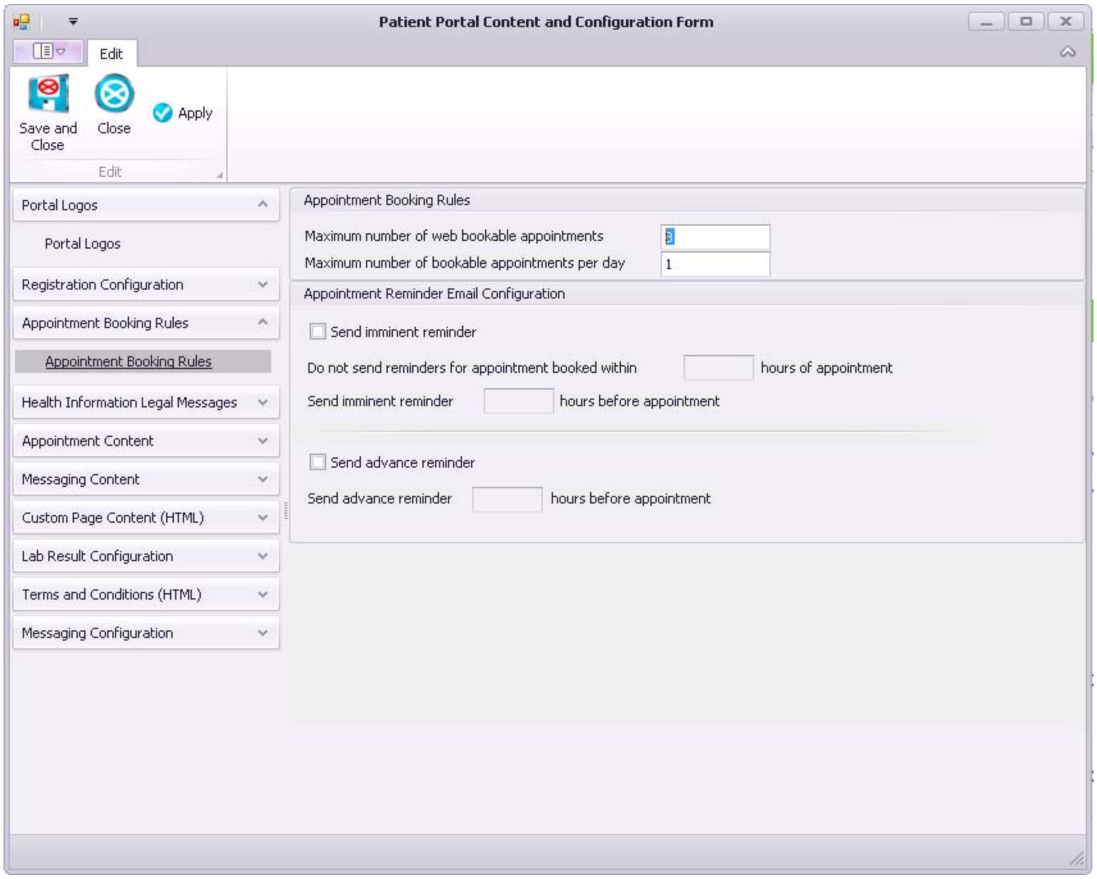
Dear <UserFirstName UserLastName>, we are writing to remind you about the following appointment for <PatientName> with <Provider Full Name>, Credentials> at <Clinic Name>
Date: <ApptDate>
Time: <ApptTime, Timezone>
Address: <LocationAddress>
<Maplink>

Remember, you can book or cancel appointments online in your <ClinicName> Patient Portal account, login here <login link>.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** ().The **Patient Portal Content and Configuration Form** window opens.

3. In the left column, click **Appointment Booking Rules** > **Appointment Booking Rules**.




4. In the **Maximum number of web bookable appointments** field, enter the maximum number of appointments a patient can book online for a particular provider.

   Once a patient reaches their maximum number of appointments, they cannot book another appointment online with that provider until at least one of their currently booked appointments is marked as **Confirmed** in Wolf EMR.

5. In the **Maximum number of bookable appointments per day** field, enter the maximum number of appointments a patient can book online for one calendar day for a particular provider.

   **Tip:** If you do not want to restrict online appointment bookings, then leave one or both of the fields blank.

6. In the **Appointment Reminder Email Configuration** area, specify whether to send advance and imminent reminders, and specify how many hours in advance of the appointment to send the reminders.

7. Perform one of the following actions:

   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).

- To apply your changes to the patient portal and close the window, click **Save and Close** ().
- To close the window without saving your changes, click **Close** ().

## Setting up a provider's schedule for online appointment booking

Your clinic has complete control over how and when patients can book appointments online. Before you plan how to best configure online appointment booking to meet the needs of your clinic, consider the following questions:

- What types of appointments do you want patients to be able to book online? (For example, should patients be able to book appointments such as physicals or prenatal visits online?)
- Can patients book last minute appointments online? Or must they book a certain number of days in advance?
- How far in advance do you want a patient to be able to book an appointment online?
- Are there specific days in the week or certain time slots in a day where you do not want patients to be able to book an appointment online? (For example, do you want to restrict online bookings for days of the week your clinic tends to receive more walk-ins?)

Configure a provider's schedule for online booking involves the following tasks:

- "Creating "web-bookable" schedule time types" on page 78
- "Enabling specific types of appointments to be booked online" on page 83
- "Enabling specific days and time slots for online booking" on page 85

### Creating "web-bookable" schedule time types

You should create a specific schedule time type for the purpose of defining web-bookable time slots. Name this schedule time type "Web Appt", "Online Appt", or something similar.

#### Clinics with multiple providers on different time intervals

If you have multiple doctors on different schedule intervals, create a separate schedule time type for each interval.

For example, in a multi-doctor clinic, Doctor A has 10-minute appointment slots and Doctor B has 15-minute appointment slots. The clinic creates two schedule time types to define "Web Bookable" appointments for each provider:

- Web Appt 10– To define "Web Bookable" appointments for Doctor A.
- Web Appt 15 – To define "Web Bookable" appointments for Doctor B.

### Providers who have multiple types of appointments at different time intervals

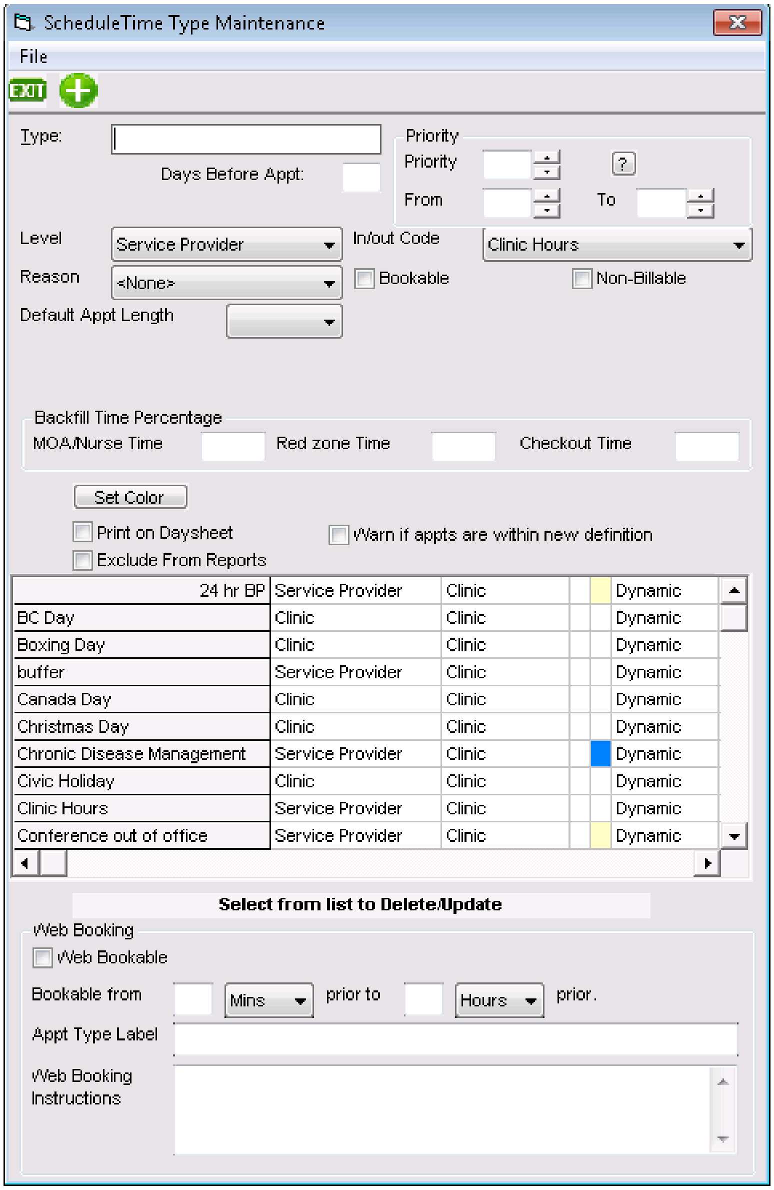
If one of your providers books several types of appointments that require different lengths of time, create a separate schedule time type for each length.

For example, a doctor requires 10-minute appointments for most of their general clinic visits,however they require 20-minute appointments for complete physicals. You could then create the following time types to accommodate each appointment length:

- Web Appt 10– To define “Web Bookable” appointments for general clinic visits.
- Web Appt 20– To define “Web Bookable” appointments for complete physicals.

## Steps

1. From the **Appointment Scheduler** menu, click **Configure** > **Time Types**. The **Schedule Time Type Maintenance** window opens.




2. Click **New** ().

3. Enter information for the new **Time Type**, using the following table as a reference:

| Field | Description |
|---|---|
| **Type** | Type the word or phrase you want to appear on the schedule. For example, for 10-minute "web bookable" slots, type **Web Appt 10**. |

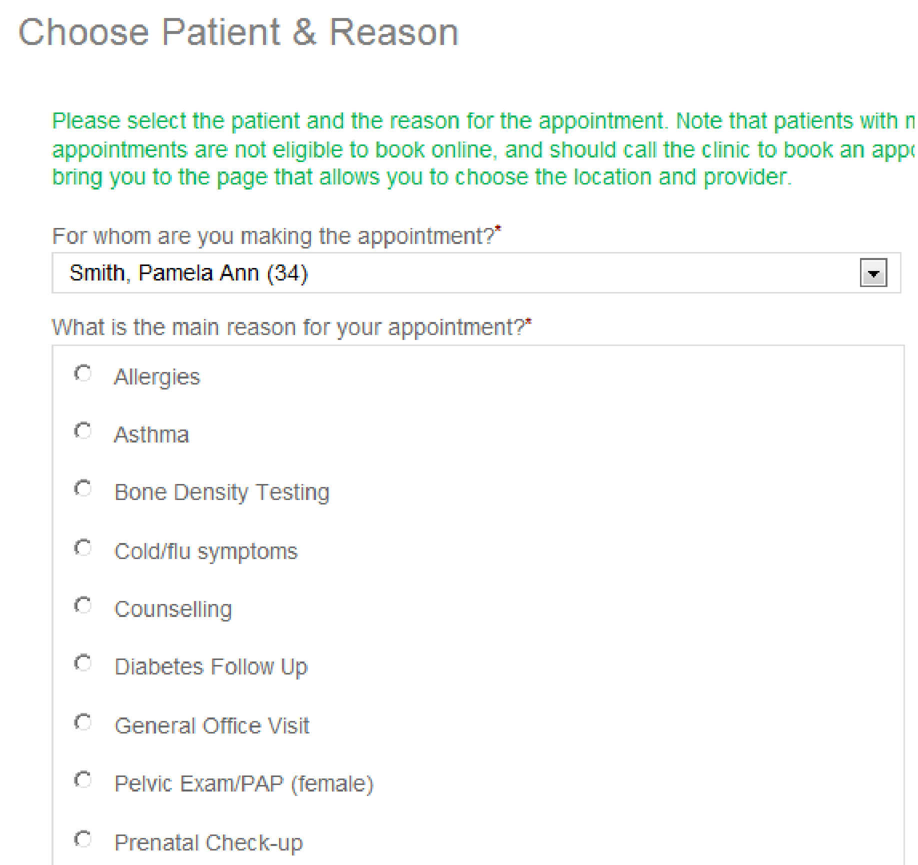
| | |
|---|---|
| **Level** | In the list, complete one of the following actions:<br>To make this time type available when defining each provider's schedule, choose **Service Provider**.<br>To make this time type available only when defining clinic schedules (for example, holidays or office closed), choose **Clinic**. |
| **Reason** | In the list, choose the default appointment reason to display on appointments booked in these time slots. For example, you can have the appointment reason default to Office Visit – Online.<br>**Note:** This list contains appointment reasons that are defined in the Appointment Reason Maintenance window. You can add or edit appointment reasons as needed. See "Enabling specific types of appointments to be booked online" on page 83. |
| **Bookable** | Select this check box (if it is not selected already). |
| **Non-Billable** | To ensure that appointments booked on these time slots are billed, leave this check box clear. |
| **Default Appt Length** | In the list, click the default length for appointments booked on these time slots.<br>**Note:** The appointment length should be compatible with the provider's time slot intervals. For example, if a provider's schedule is set to 10-minute intervals, then the set the interval to 10-minute or a multiple of 10-minute (for example, 20 minutes). |
| **Set Color** | To display a background color on these time slots, click **Set Color** and choose the color you want. |
| **Print on Daysheet** | Select to print the schedule time type on your daysheets.<br>**Note:** Most clinics cleat this option, as they want only appointments to display on their daysheets. |
| **Exclude From Reports** | Leave this check box clear, unless you want appointments booked on these time slots to be excluded from trend reports. |
| **Warn if appts are within new definition** | Clear this check box (if it is not clear already). |
| **Priority area** | |

| | |
|---|---|
| **Priority** | Enter the default priority level (usually 6 or 7) for the time type.<br>The priority determines what layer on the schedule that a time definition displays. The larger the priority number, the lower the layer on the appointment schedule.<br>9 = lowest layer (displays behind all other layers)<br>1 = highest layer (displays in front of all other layers)<br>Click the icon to view recommendations for assigning priorities to time types. |
| **From**<br>**To** | Enter the range of priority levels you can apply to the time type.<br>For example, if you want the default priority level to be 7, but you want to be able to customize it between 5 and 9, type 7 in the **Priority** field, type 5 in the **From** field, and type 9 in the **To** field. |
| **Web Booking** area (located at the bottom of the window) | |
| **Web Bookable** | Select to enable patients to book their own appointments online on these appointment slots.<br>**Note:** You must select this check box to enable appointments to be bookable from the patient portal. |
| **Bookable from** | Enter the minimum number of minutes, hours, or days ahead of time patients can book online appointments on these appointment slots. |
| **Prior to** | Enter the maximum number of minutes, hours, or days ahead of time a patient can book an online appointment for. |
| **Appt Type Label** | Enter a label for the appointment type. The label typically matches the name entered in the Type field. |
| **Web booking instructions** | Enter any booking instructions for the patient. |

4. To save the time type, click **Save** ( ).
5. When you are done, click **Close** ( ).

## Enabling specific types of appointments to be booked online

When a patient books an appointment online, they must select a reason for the appointment.

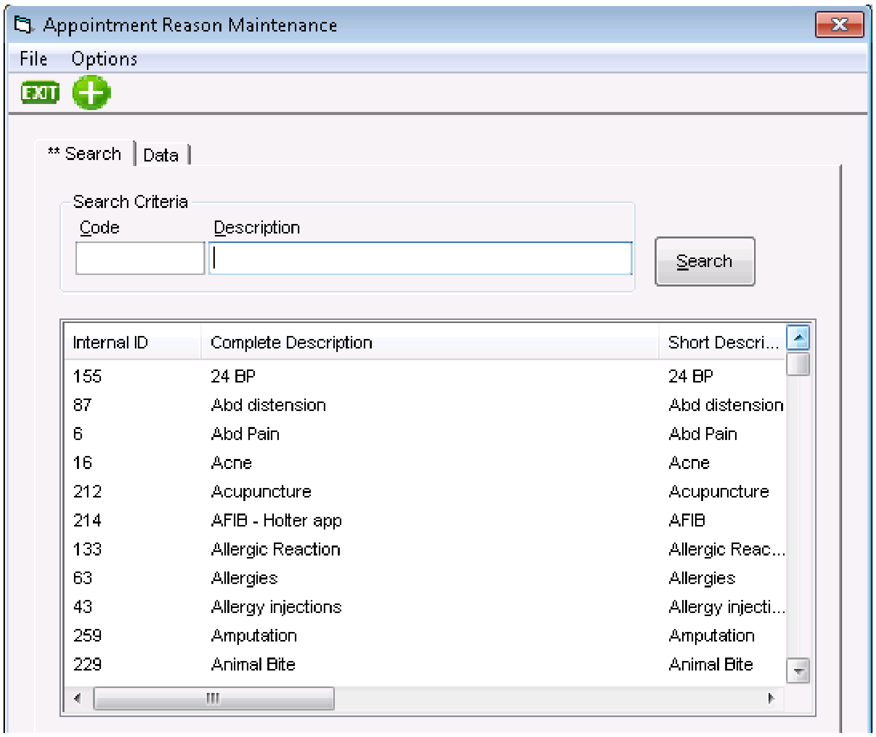



You can customize this list of reasons, thereby specifying what types of appointments patients can book online.

**Tip:** To enhance the user experience, we recommend that you enable as many appointment types as possible for web booking.

### Steps

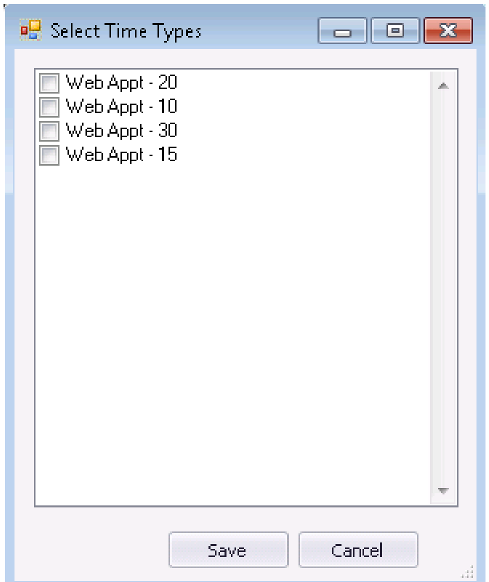
1. From the **Appointment Scheduler**, click **Configure** > **Appointment Reasons**. The **Appointment Reason Maintenance** window opens with a list of your current appointment reasons displayed.




2. In the list of appointment reasons, click the **Internal ID** of an appointment reason for which you want to enabled online booking. The EMR displays the Data tab for the appointment reason.
3. If the appointment reason you want is not on the list, then add an appointment reason.
4. In the **Web Booking** area, select the **Display in Web Appointment Reasons** check box.
5. In the **Web Appt Reason Label** field, type the appointment reason text that will display on the patient portal.

   **Note:** Your patients will see the **Web Appt Reason Label**. Avoid using abbreviations or words that a patient may not understand. For example, use “Complete Physical” instead of “CPX”.

6. Click **Select Time Types**. The **Select Time Types** window opens, with a list of "web bookable" schedule time types.




**Tip:** The **Select Time Types** button displays only when you select the **Display in Web Appointment Reasons** check box.

7. Select the check box beside the time type(s) you want patients to be able to book this type of appointment.

**Tip:** Ensure that you select a time type(s) that matches the appointment length required for the **Appointment Reason**. For example, if the appointment reason is "Complete Physical", and physicals require a 20-minutes appointment, ensure you associate the "Complete Physical" with the Web Appt – 20 time type.
If one provider spends a longer amount of time with their patients than another in the clinic, you can associate an appointment reason with multiple time types that are set for different appointment lengths.

8. Click **Save** ().

9. When you are done, click **Close** ().

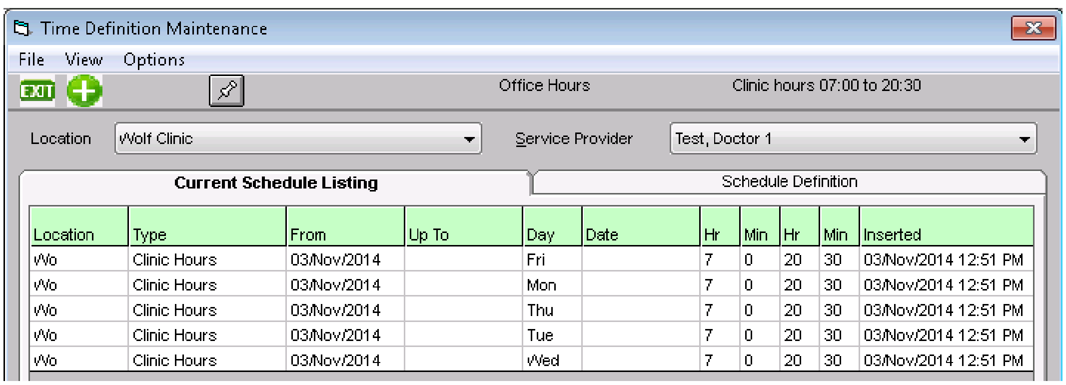
## Enabling specific days and time slots for online booking

On your clinic's appointment schedule, you can select what time slots your patients can book online. For example, you can choose to allow online appointment bookings only for times slots where your clinic typically sees fewer walk-in patients and is less busy.

**Tip:** To encourage your patients to book their appointments online, consider making as many of your appointment slots "web bookable" as possible. This will make it easier for patients to find appointment times that work for them.

### Steps

1. Create scheduling time types that are defined as "web bookable" (see "Creating "web-bookable" schedule time types" on page 78").
2. Apply the "web bookable" time types to a provider's schedule, or to all providers' schedules at once in the **Time Definition Maintenance** window.
3. To enable specific days and or time slots for online booking:
4. From the **Appointment Scheduler** menu, choose **Configure** > **Physician and Clinic Hours (Schedule Setup)**. The **Time Definition Maintenance** window opens.



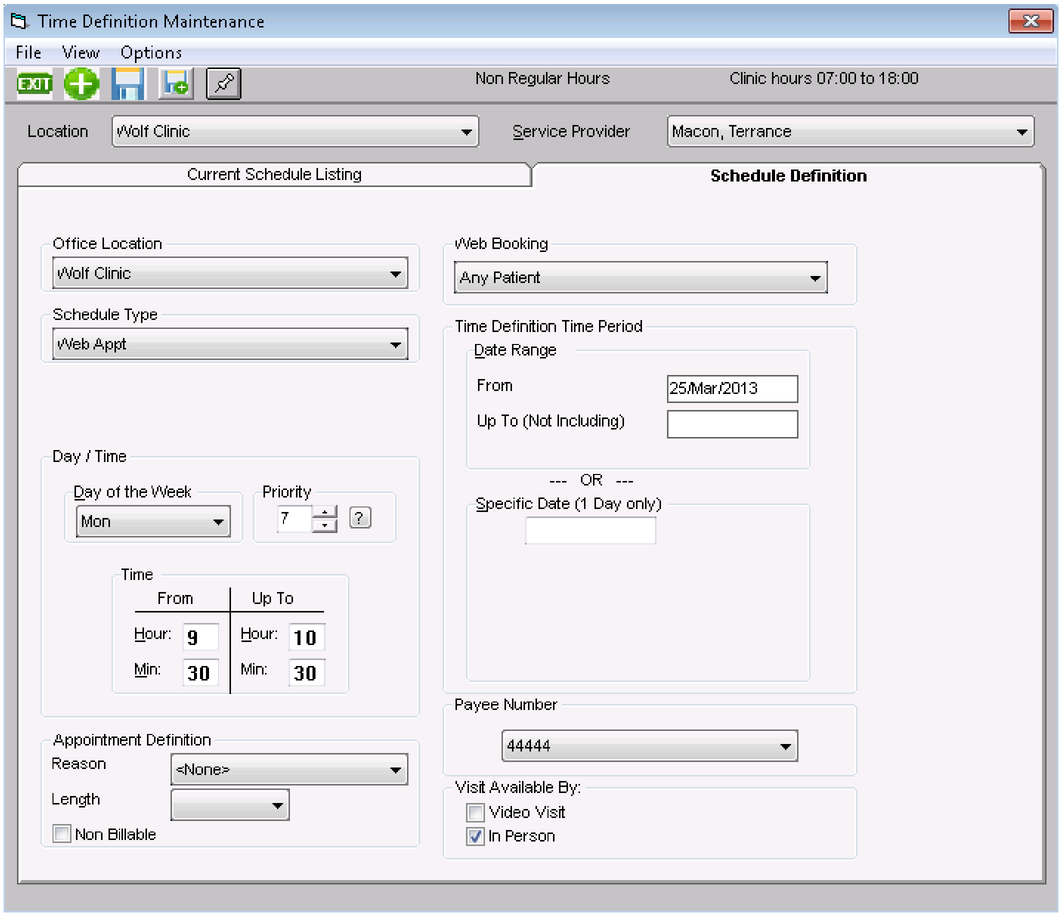

5. If your clinic has multiple locations, in the **Location** list click the location you are enabling online appointments for.

   **Tip:** To enable online appointments for the same time slots for all locations, choose **<All>**.

6. In the **Service Provider** list, choose the provider you want to enable online appointments for.

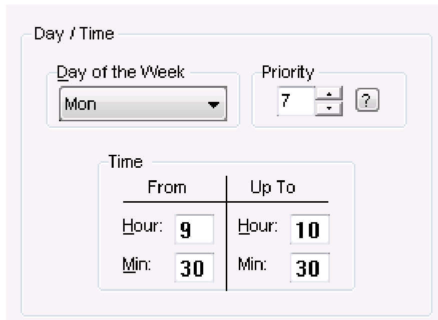
   **Tip:** To enable online appointments for the same time slots for all providers, choose **<Entire Office>**.

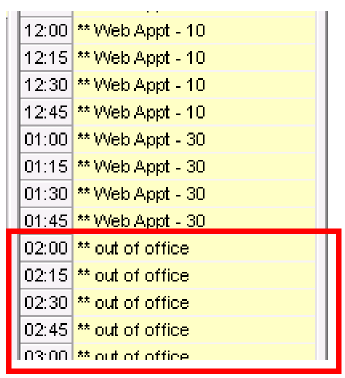
7. At the top of the window, click **New** ( ). The **Definition Maintenance** window opens.




8. Using the following table, enter information for the web bookable time.

| Entry label | Instructions |
|---|---|
| **Schedule Type** | In the list, click a schedule time type that is configured to be "web bookable". See "Enabling specific types of appointments to be booked online" on page 83. |
| **Day of the Week** | To input a time definition for each day of the week individually, click a day of the week. For example, Monday.<br>To input a time definition all days of the week at once, click **<All>**. |
| **Web Booking** | In the list, select what patients can book appointments with this provider. |

| | |
|---|---|
| **Time** | In the **From** and **Up To** fields, enter the start and end times for web-bookable time slots for the day selected (or for the week, if **<All>** is selected).<br><br><br>For example, if you only want web-bookable appointments starting from 1 PM with the last web-bookable appointment ending at 3 PM, then enter 1 in the From Hour field and 00 in the From Min field, and then enter 15 in the Up to Hour field and 00 in the Up to Min field. |

| | |
|---|---|
| **Priority** | In the Priority field enter the priority level for the time definition.<br><br>The priority determines what layer on the schedule the time definition displays. The larger the priority number, the lower the layer on the appointment schedule.<br><br>■ 9 = lowest layer (displays behind all other layers)<br>■ 1 = highest layer (displays in front of all other layers)<br><br>**Recommendation:** For setting web-bookable time definitions set the priority to be a higher than the number you use for holidays, and provider Out of Office time definitions. A priority of 6 or 7 is used most often for web-bookable appointments.<br><br>**Important:** Appointment slots are only web bookable if a web-bookable Time Type is visible on the schedule. If you "hide" a web-bookable Time Type with another Time Type, for example, "Out of Office", then that appointment slot is no longer web-bookable.<br><br><br>Web-bookable slot is covered by "out-of-office", therefore the slot is no longer web-bookable. |
| **Appointment Definition** | In the **Reason** list, choose the default appointment reason to display on appointments booked in these time slots. For example, the appointment reason can default to Office Visit – Online.<br><br>**Note:** Choose an appointment reason that is configured to "display in web appointment reasons". See ""Enabling specific types of appointments to be booked online" on page 83".<br><br>In the **Length** list, click the default length for appointments booked on these time slots. |

| | |
|---|---|
| **Time Definition Time Period** | In the **From** and **Up To (Not including)** fields, enter the date range you want the hours you defined to be in effect.<br>**Note:** The **From** field defaults to today's date. If you leave the **Up To** field blank, the time definition remains on the provider(s) schedule indefinitely.<br>If this time definition is to be in effect for only one day, enter the date in the **Specific Date (1 Day Only)** field. |

9. Click **Save** ( ).

10. If you are adding time definitions for each day of the week individually, repeat these steps for each day of the week.

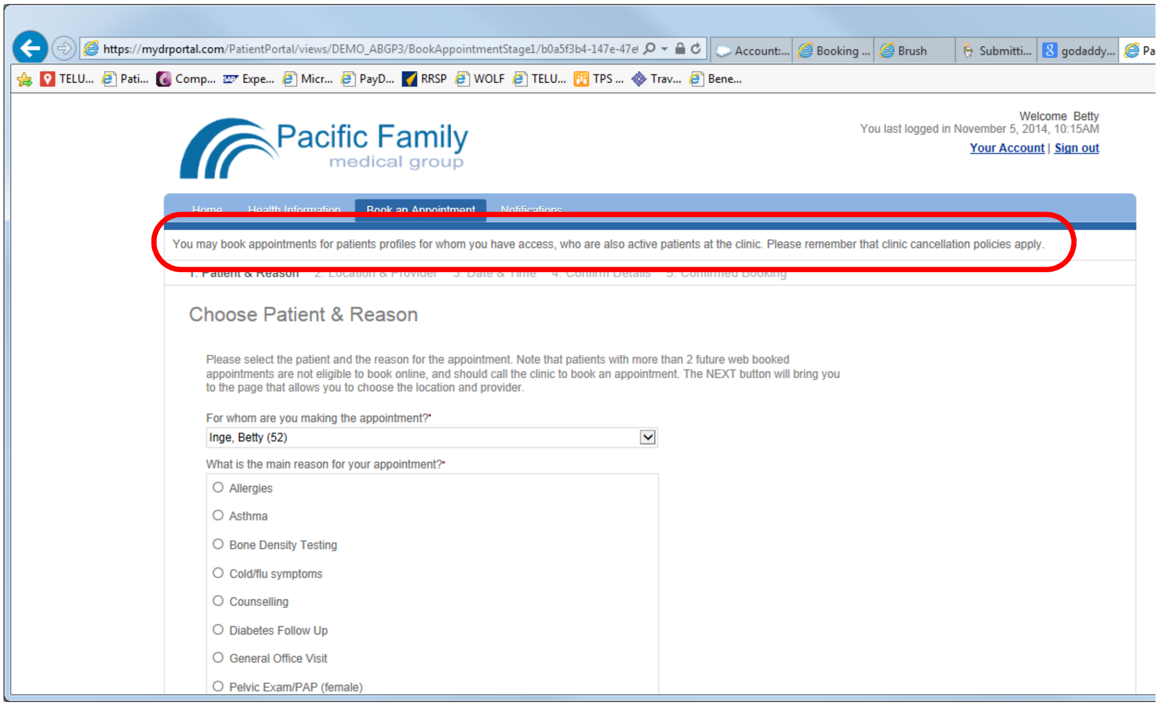
11. When you are done, click **Close** ( ).

## Modifying the booking pages' legal messages and instructions

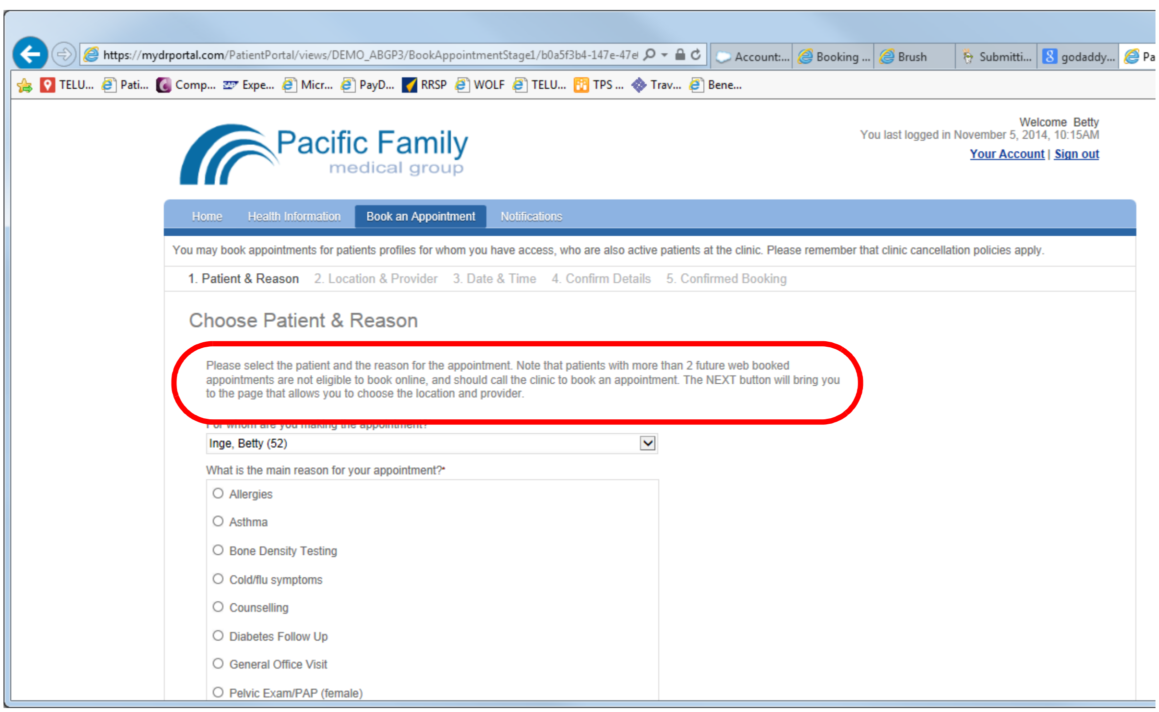
At each step of the online appointment booking process, your patients are presented with an instructional and/or legal message. When your clinic is set up with the patient portal, these instructional and legal messages are customized by TELUS Health to reflect your clinic's current policies.

If you later want to modify the booking instructional and legal messages, you can modify the following messages as needed.

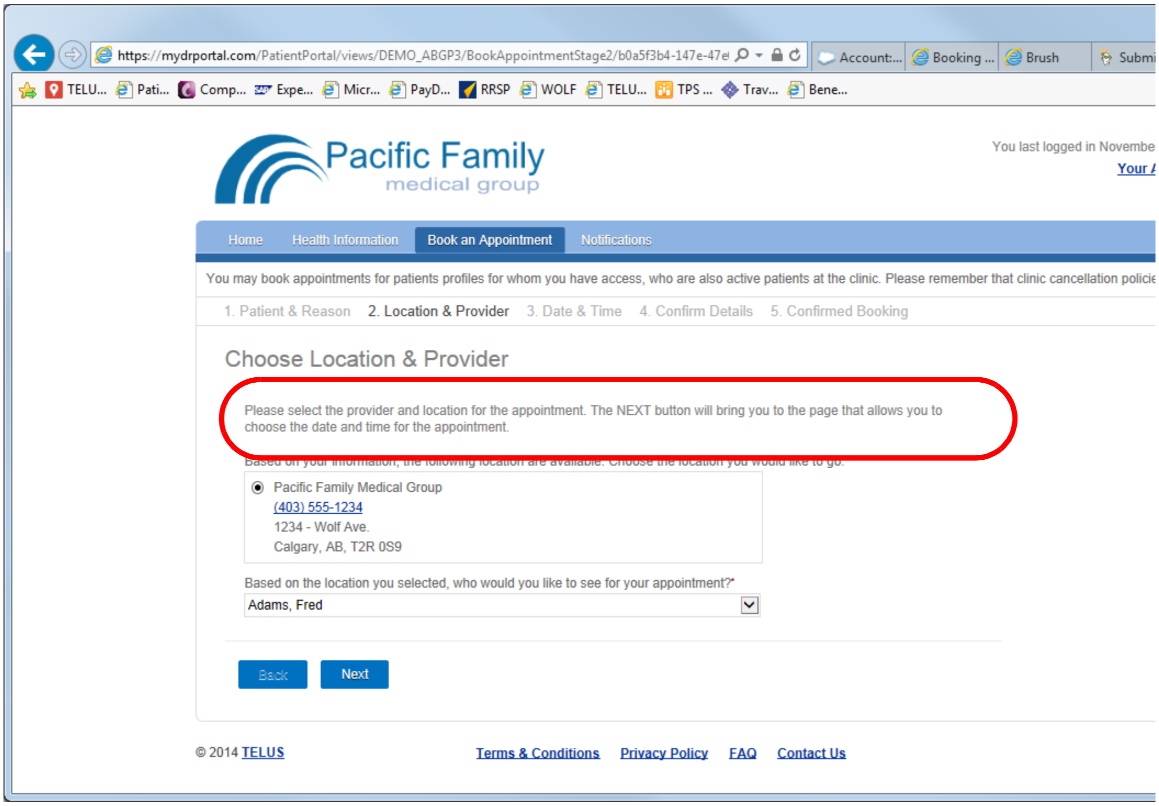
## Book appointment legal message (Located at the top of all booking windows)



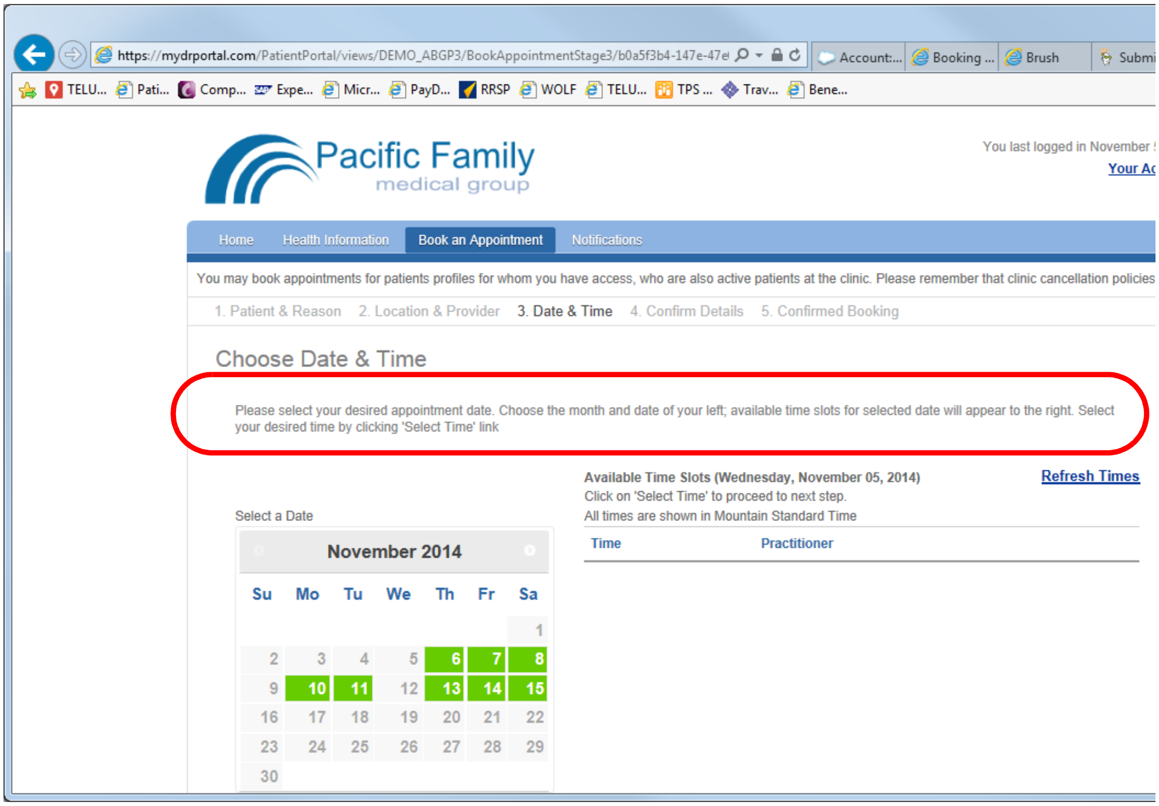

## Book Appointment Screen 1 Instructions



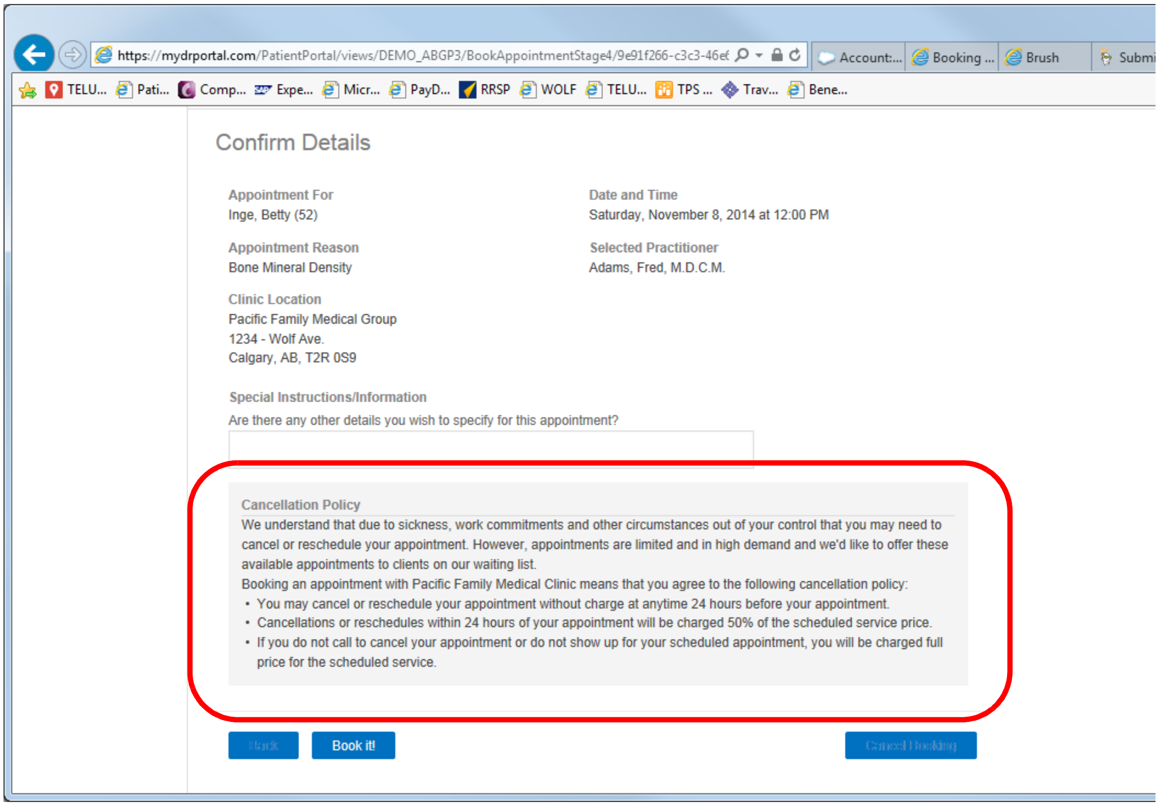
## Book Appointment Screen 2 Instructions - Location & Provider



## Book Appointment Screen 3 Instructions - Date & Time

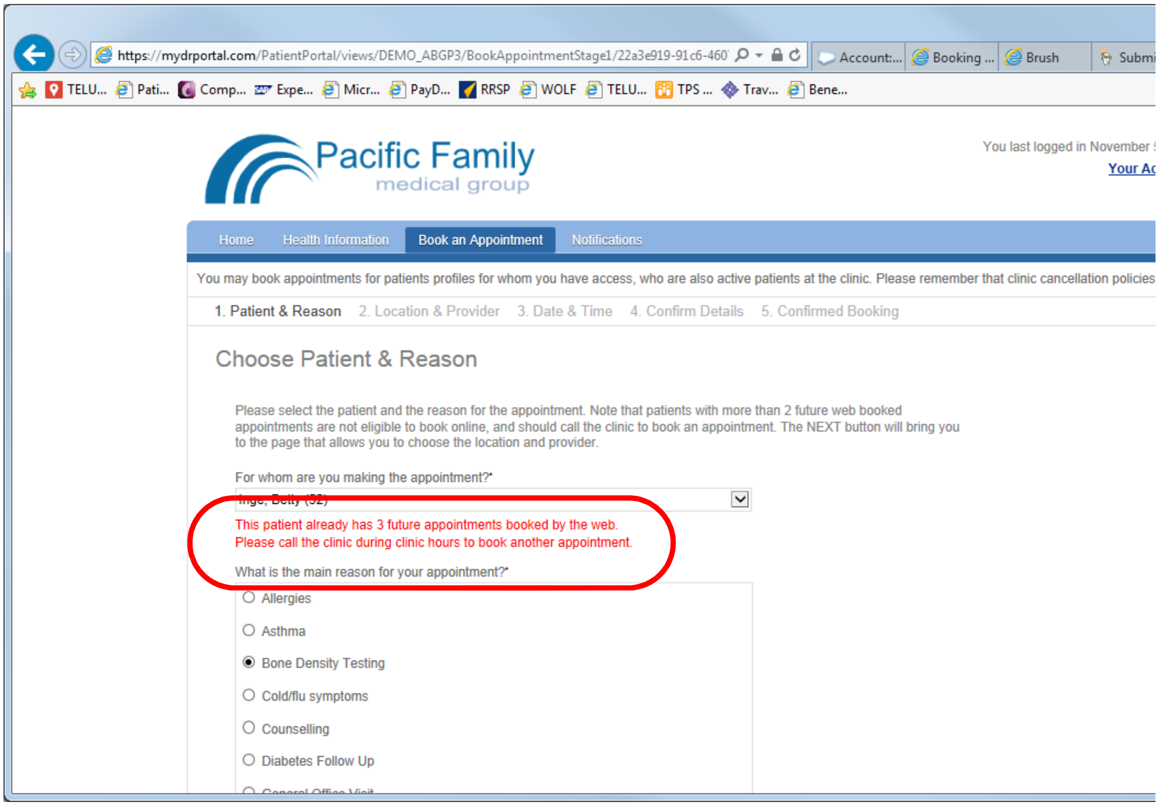


### Book/Cancel Appointment Cancellation Policy - Confirm Details




### Max booking reached message (when patient exceeds the max number of online

## bookings

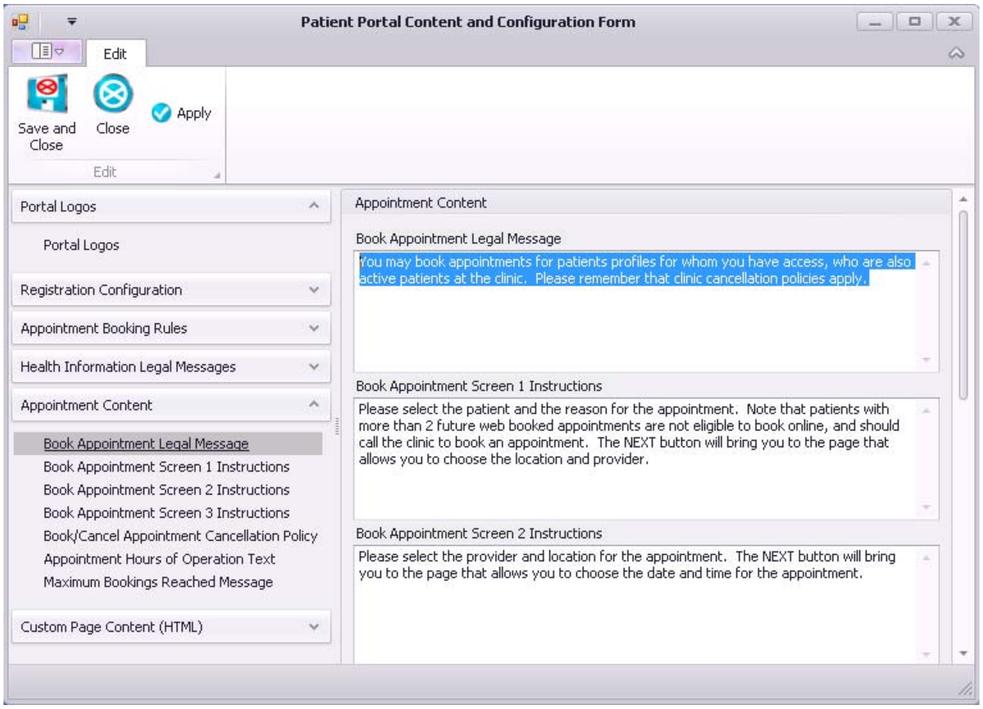



## Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.

2. In the **Patient Portal** area, click **Configure Web Content** ( ).

3. In the left column, choose **Appointment Content** and then choose the book appointment message you want to modify. The EMR displays all current appointment messages on the right side of the window, with the selected page's message highlighted.




4. Edit the **Book Appointment** page message as needed. You can review and modify all your informational and legal messages at once by scrolling down and reviewing all legal messages displayed.

5. Perform one of the following actions:

   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Configuring patient portal registration rules

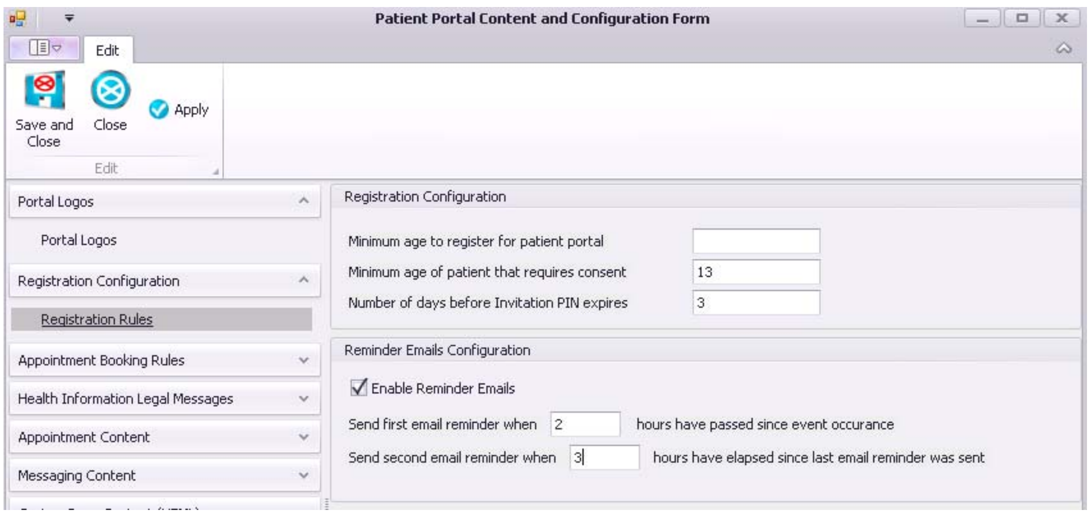
You can set patient registration rules for the patient portal. Registration rules include:

- The minimum age a patient must be to register for the patient portal.
- The age of consent: Determines at what age a patient must consent (by signing a consent form) to enable another individual to view their health information on the patient portal. For

example, if a mother has access to her son's health information, she can no longer access his health information when he reaches the age of consent, unless he signs a consent form. For more information, see "Giving other people access to a patient's data" on page 11.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** ( ).The **Patient Portal Content and Configuration Form** window opens.
3. In the left pane, choose **Registration Configuration** > **Registration Rules**.




4. Use the following table to enter information in the **Registration Configuration** area:

| Field | Description |
|---|---|
| **Minimum age to register for patient portal** | Enter the minimum registration age in years. If you do not want to set an age restriction, then leave the field blank. |
| **Minimum age of patient that requires consent** | Enter the age of consent in years. |
| **Number of days before invitation PIN expires** | Enter the number of days a patient's registration PIN is valid. |
| **Enable Reminder Emails** | Select to send a reminder email when a patient was invited to register for the patient portal but has not yet registered. |
| **Send first/second email reminder…** | Enter how long after the initial invitation to send the first and second reminder. We recommend 25 hours. |

5. Perform one of the following actions:
   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Configuring patient messaging

If your clinic sends messages to individual patients via the patient portal, you can choose if patients can send messages back to the clinic, how many message they can send, and the length in characters of their messages.

You can configure these settings for the entire clinic or per provider.

You can also temporarily disable your patients' ability to send messages, for example, if your clinic is closed for a week.

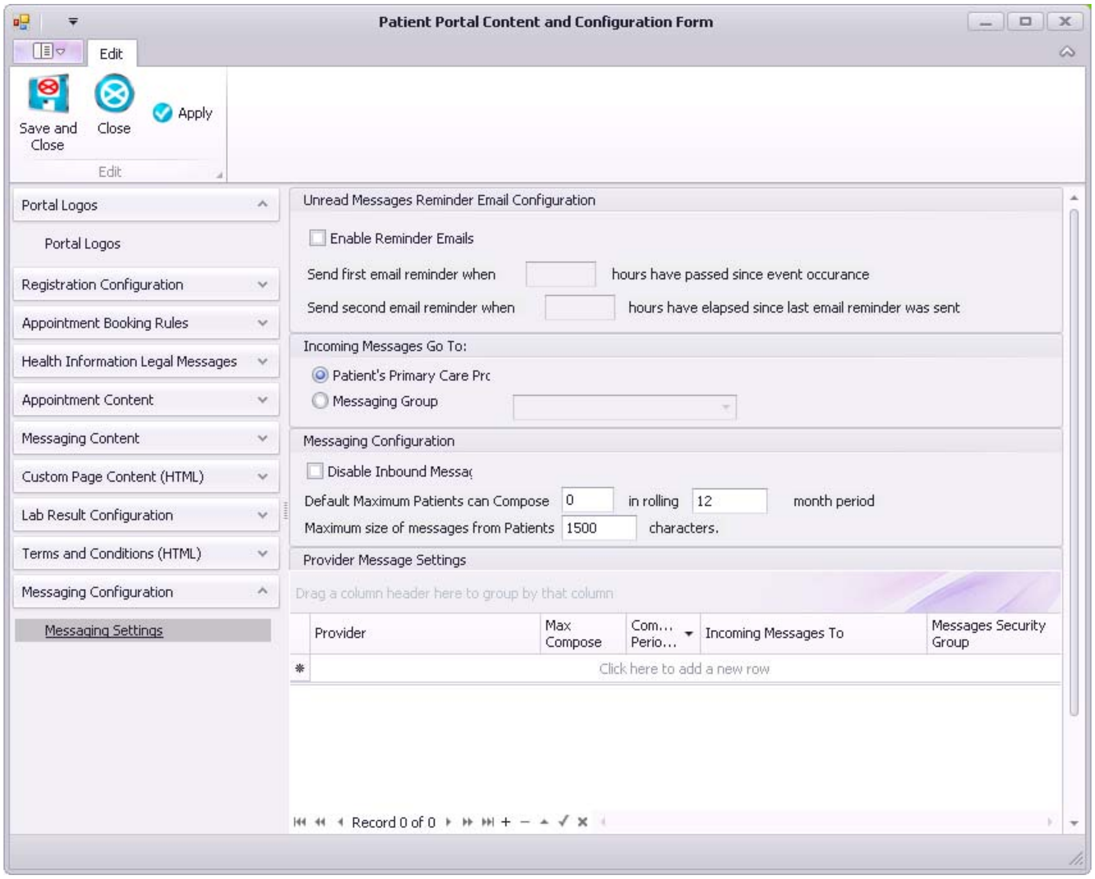
You can also restrict how many messages a specific patient can send (see "Registering patients for the patient portal" on page 7).

**Note:** If you prevent a patient from sending messages to a provider, but the patient has access to another provider's patient data (such as their son) and this other provider does enable inbound patient messages, this patient will still be able to send messages to their provider.

### Steps

1. On the Wolf EMR **Home** page, click the **Maintenance** tab.
2. In the **Patient Portal** area, click **Configure Web Content** ( ).

3. In the left pane of the **Patient Portal Content and Configuration Form** window, click **Messaging Configuration** > **Messaging Settings**.




4. Use the following table to enter information in the **Messaging Configuration** area:

| Field | Description |
|---|---|
| **Enable Reminder Emails** | Select to enable sending reminder emails. |
| **Send first/second email reminder…** | Enter how long after the initial email to send the first and second reminder. We recommend 25 hours. |
| **Incoming Messages Go To** | Select the clinic default for who will receive incoming messages from patients. |
| **Disable Inbound Messages** | Select to prevent all patients from sending messages to the clinic. |

| | |
|---|---|
| **Default Maximum Patients can Compose** | To restrict the number of messages patients can send, type the maximum number of messages each patient can send over a specified number of months.<br>To enabled unlimited messages, type 999.<br>The maximum number of messages can also be customized for each patient. See “Registering patients for the patient portal” on page 7. |
| **Maximum size of messages from Patients** | To restrict the length of messages patients can send, type the maximum number of characters. |
| **Provider Messaging Settings** | To specify the messaging settings for a specific provider, select the provider and choose the settings. |

5. Perform one of the following actions:

   - To apply your changes to the patient portal and leave the window open, click **Apply** ( ).
   - To apply your changes to the patient portal and close the window, click **Save and Close** ( ).
   - To close the window without saving your changes, click **Close** ( ).

## Configuring automated notifications (Rules)

Through the patient portal, your patients can receive automated notifications for a variety of preventive care, or disease management reminders, including notifications for:

- Mammograms
- Pap smears
- Colonoscopies
- HbA1C tests
- Follow-up appointments

When a patient receives a notification on the patient portal, they are informed by email. This email does not contain any personal or medical information, it only prompts the patient to log into the patient portal to view the notification.

You create automated patient portal notifications using the **Rules** feature of Wolf EMR practice search. When you configure a rule to display in the patient portal, the EMR identifies all patient portal-registered patients meeting the rule criteria and sends those patients a notification automatically.

### Steps

1. On the Wolf EMR **Home** page, click **Practice Search** (  ).

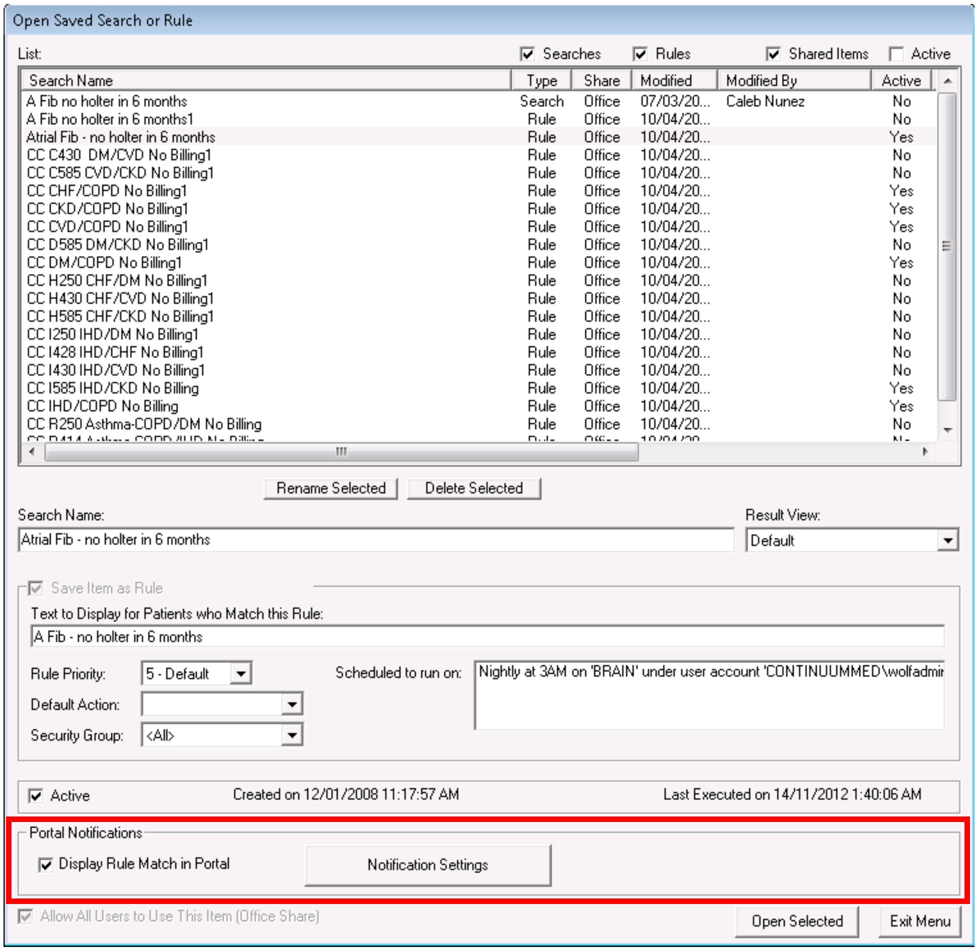
2. At the top of the **Practice Search** window, click **Open a saved search** ().

   A list of pre-configured searches and rules opens. Rules are indicated by the word **Rule** in the **Type** column.

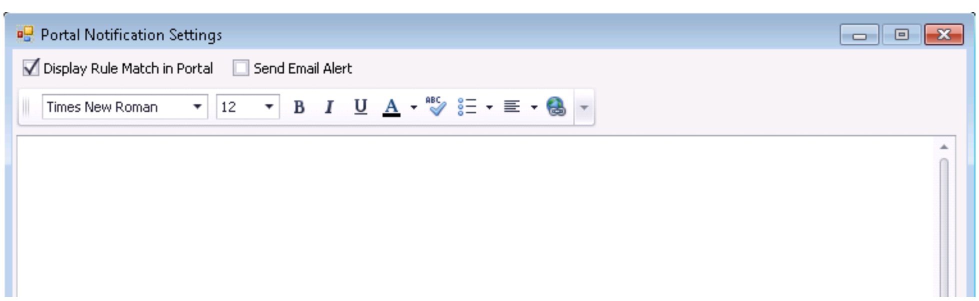
3. In the list of searches and rules, click a rule you want to configure as a patient portal notification.

   **Note:** Your Wolf EMR comes with a large set of pre-defined rules, including
   Rules for preventive care initiatives, including monitoring of BP, and immunizations.
   Rules to manage patients with chronic diseases such as diabetes, COPD, asthma, hypertension, and depression.
   To learn how to create a new rule, or to modify an existing rule, refer to the Wolf EMR Help menu.

4. In the **Portal Notifications** area, select the **Display Rule Match in Portal** check box, and then click **Notification Settings**.




The **Portal Notification Settings** window opens.




5. To have patients receive an email indicating that they have a notification waiting on the patient portal, select the **Send Email Alert** check box.

6. In the text area, type the notification message that patients will see in the patient portal. For example, “Our records show that you are due for a routine Mammogram. Please contact our clinic to set up an appointment”.

**Tip:** Use the formatting tools located above the text area to modify the font, add bullets or numbers, align the text, and add hyperlinks.

7. Click **Save**.
8. To exit the **Open Save Search or Rule** window, click **Exit Menu**.
9. To exit the **Practice Search** window, click **Close** ( ).

## Tracking cancelled appointments

When patients cancel their appointments online, Wolf EMR does not notify you of the cancellations.

This can be problematic if your clinic charges patients for canceling their appointments less than 24 hours prior to their appointment. Instead, you must manually track canceled appointments.

For appointments canceled online, you can:

- Track what patients have canceled their appointments in the last 24 hrs, or in a specified date range, using the **Customized Appointment Report**. See "Producing a report of cancelled appointments" on page 103.
- Set your appointment scheduler to show cancelled appointments. See "Setting your appointment scheduler to show cancelled appointments" on page 105.

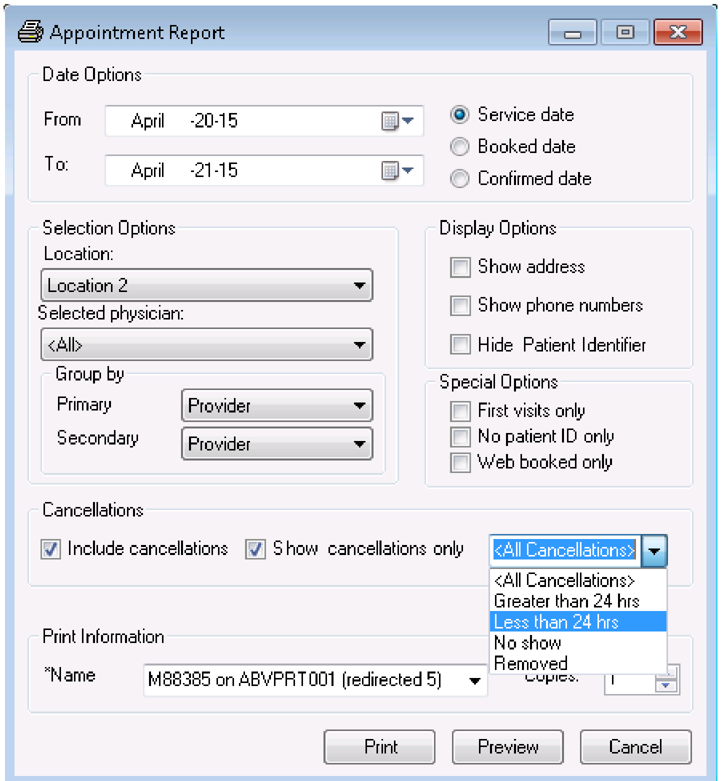
## Producing a report of cancelled appointments

You can produce a report of patients who have canceled their appointments less than 24 hours prior to their appointment. You can run this report as often as you want, for any time range you want.

Most clinics prefer to run the report daily.

## Steps

1. On the **Appointment Scheduler** menu, choose **Report** > **Customized Appointment Report**. The **Appointment Report** window opens.




1. To select what information you want to display in the report, using the following table as a reference:

| Field | Description |
|---|---|
| **Date Options** | Choose **Service date**. In the **From** field, leave the date as today's date. In the **To** field, enter tomorrow's date.<br><br>This creates a report that includes cancelled appointments that would have taken place today or tomorrow. |
| **Selection Options** | ■ **Location**: If your clinic has more than one clinic location, choose the location you want to view cancelled appointments for,.<br><br>■ **Selected Physician**: Choose the provider you want to view cancelled appointments for.<br><br>■ **Group by Primary**: Choose an option for grouping (ordering) patients on the report.<br><br>■ **Group by Secondary**: Choose an option for grouping patients within the primary groups. |

| | |
|---|---|
| **Display Options** | ■ **Show address**: (Optional) Select to display patient addresses on the report.<br>■ **Show phone numbers**: (Optional) Select to display patient phone numbers on the report.<br>■ **Hide Patient Identifier**: (Optional) Select to hide the patient's Wolf EMR ID number. |
| **Special Options** | To view only canceled appointments that were originally booked on the patient portal, select the **Web booked only** check box. |
| **Cancellations** | ■ **Include cancellations**: Select this check box.<br>■ **Show Cancellations only**: Select this check box.<br>Choose one of the following options:<br>■ **Less than 24 hrs**: (Most Common) to view cancellations that occurred less than 24 hrs before the appointment time/day.<br>■ **Greater than 24 hrs**: To view cancellations that occurred more than 24hrs prior to the appointment time/day.<br>■ **<All Cancellations>**: To view all cancellations that occurred for appointments booked for dates specified in the **Date Options** area. |

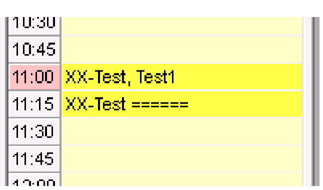
2. Complete one of the following actions:
   - To view the report (without printing), click **Preview**. The EMR displays the report in a new window in the format of a PDF document.
   - To print the report, in the **Name** list, choose a printer. In the **Copies** field, type the number of copies and then click **Print**.

## Setting your appointment scheduler to show cancelled appointments

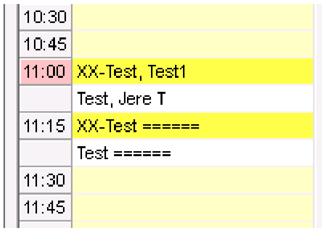
You can show cancelled appointments on the appointment scheduler.

### Steps

1. On the **Appointment Scheduler** menu, choose **User Preferences** > **Appointment Display Settings** > **Show Cancels**. T
   Cancelled appointments appear on the schedule with XX to the left of the patient names.



If an appointment is booked on the same time slot as a cancelled appointment, the EMR adds additional appointment lines to show both.




2. To view detailed information about a canceled appointment, right-click the appointment, and choose **Edit**.

## Patient portal reports

Using a practice search and Wolf EMR reports, you can track and manage patients who are using the patient portal. For example, you can track:

- Which patients are enrolled or registered for the patient portal
- Which patients have been actively using the patient portal
- What patient portal features each registered user has access to
- Which patients have unread messages

Statistics for enrolled patients, appointments booked, and automated notifications

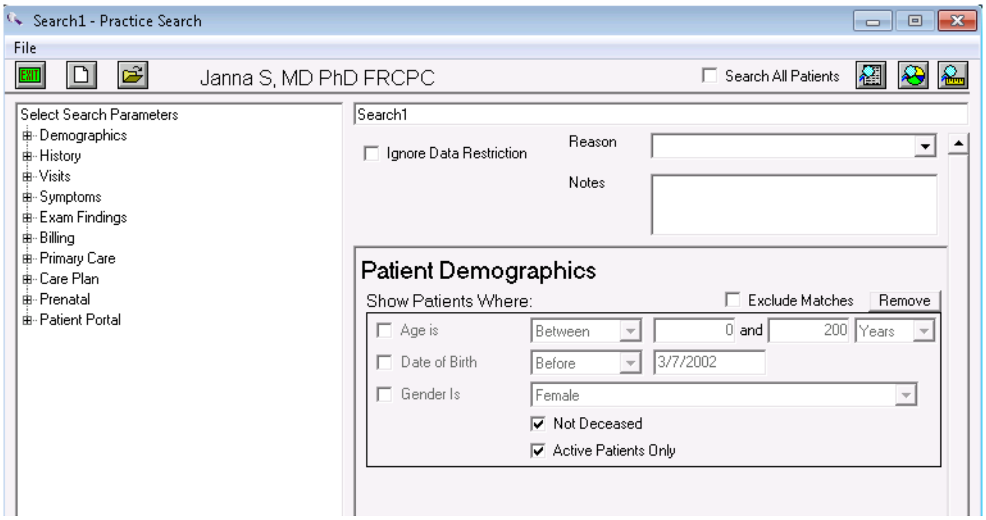
### Viewing patients who are registered for the patient portal

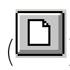
Using a practice search, you can produce a list of patients who are enrolled and/or registered for the patient portal. You can further filter the report to include only patients who:

- Logged in during a specified time period
- Have access to specific features of the patient portal (for example, online appointment booking, and video visits)
- Have a status of inactive

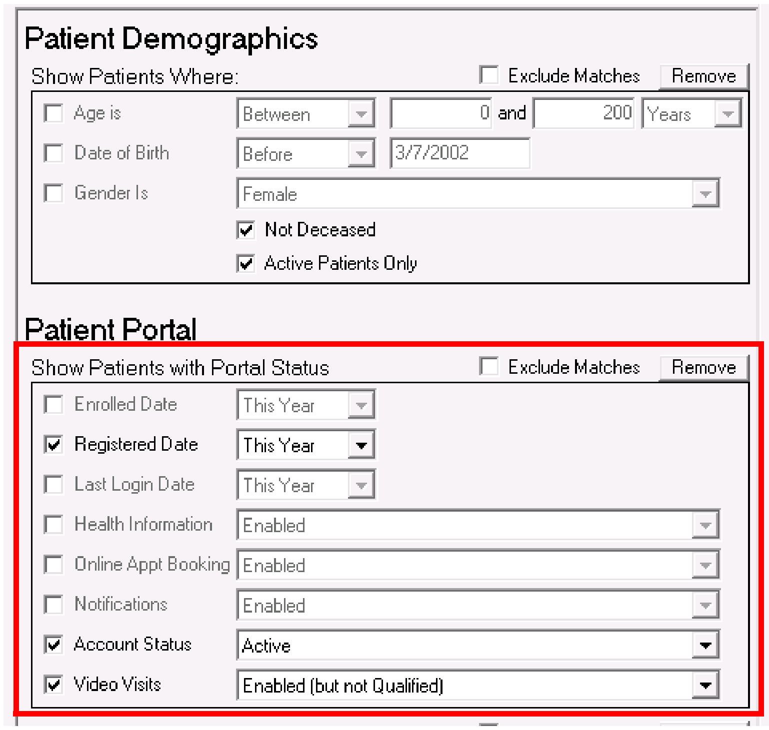
## Steps

1. On the Wolf EMR **Home** page, click **Practice Search** (  ). The **Practice Search** window opens.



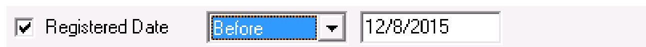
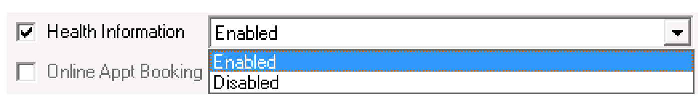

2. At the top of the window, click **Make New Search (Remove all parameters)** ().
3. In the top field, enter a name for the report, such as Registered patient portal Patients.
4. In the left pane, under **Select Search Parameters**, expand patient portal.

5. In the list of patient portal parameters, click **Portal Status**. The **Show Patients with Portal Status** area appears in the right pane.

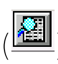


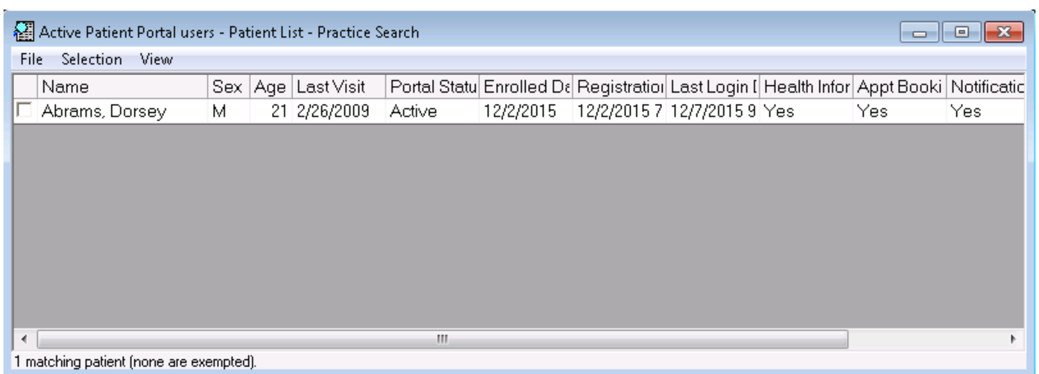

6. Using the following table, select the specific parameters patients must meet to display in the report.

| Field | Description |
|---|---|
| **Enrolled Date** | To include only patients who were enrolled for the patient portal before, following, or around a specific date or time frame:<br>1. Select the **Enrolled Date** check box.<br>2. In the list, select a time frame option. The EMR displays additional entry fields specific to the time frame option you select.<br><br><br>3. Enter a date or time frame as required. |

| | |
|---|---|
| **Registration Date** | To include only patients who registered for the patient portal before, following, or around a specific date or time frame:<br>1. Select the **Registered Date** check box.<br>2. In the list, select a time frame option. The EMR displays additional entry fields specific to the time frame option you select.<br><br><br>3. Enter a date or time frame as required. |
| **Last Login Date** | To include only patients who logged into the patient portal before, following, or around a specific date or time frame:<br>1. Select the **Last Login Date** check box.<br>2. In the list, select a time frame option. The EMR displays additional entry fields specific to the time frame option you select.<br><br><br>3. Enter a date or time frame as required. |
| **Health information** | To include only patients who have their health information (Medical Summary information) enabled or disabled:<br>1. Select the **Health information** check box.<br>2. In the list, select to include only patients who have health information Enabled or Disabled.<br><br> |
| **Online Appt Booking** | To include only patients who have online appointment booking enabled or disabled:<br>1. Select the **Online Appt Booking** check box.<br>2. In the list, select to include only patients who have online appointment booking Enabled or Disabled. |
| **Notifications** | To include only patients who have automatic notifications enabled or disabled:<br>1. Select the **Notifications** check box.<br>2. In the list, select to include only patients who have notifications **Enabled** or **Disabled**. |

| | |
|---|---|
| **Account Status** | To include only patients who have a status of active or inactive:<br>1. Select the **Account Status** check box.<br>2. In the list, select to include only patients who are **Active** or **Inactive**. |
| **Video visits** | To include only patients who have been enabled or disabled for video visits:<br>1. Select the **Video Visits** check box.<br>2. In the list, select to include only patients who are **Enabled (but not Qualified)**, **Qualified**, or **Disabled** for video visits.<br>**Note:** Patients are qualified for video visits only after they have passed video device testing. |

7. To exclude patients who meet the criteria defined in step, above the **Show Patients with Portal Status** area, select the **Exclude Matches** check box.
8. To include all providers' patients in the report, at the top of the window, select the **Search All Patients** check box.
9. Click **Show Search Results as a Patient List** (). A list of matching patients appears.

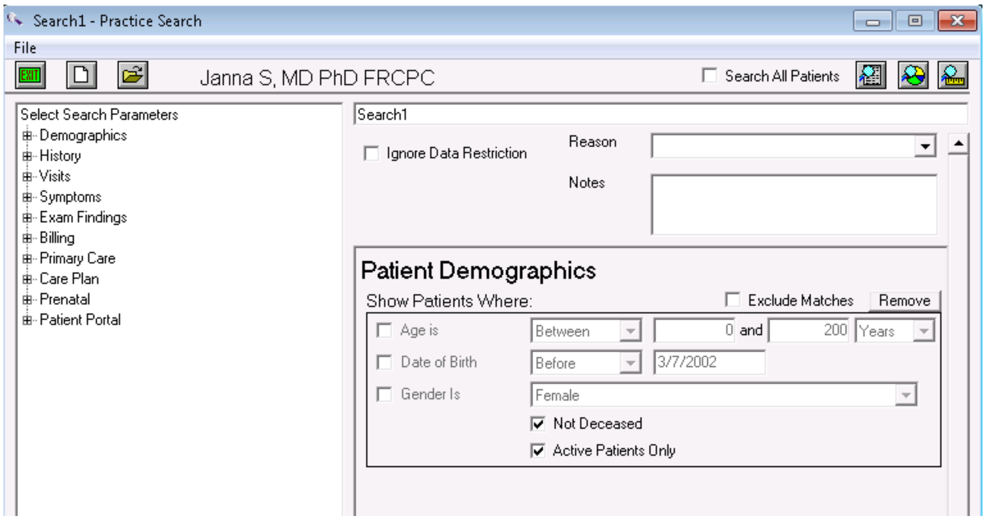


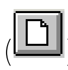

## Viewing patients who have read or unread patient portal messages

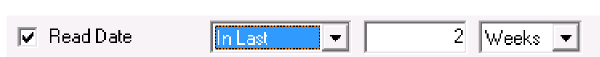
Using Practice Search you can produce a list of patients who have received messages via the patient portal. You can further filter the report to display only patients who have unread messages.

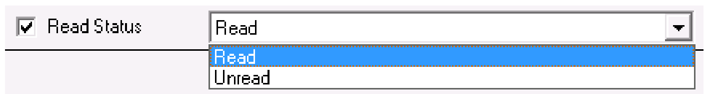
## Steps

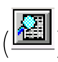
1. On the Wolf EMR Home page, click **Practice Search** (  ). The **Practice Search** window opens.




2. At the top of the window, click **Make New Search (Remove all parameters)** ().
3. In the left pane, under **Select Search Parameters**, expand **Patient Portal**.
4. In the list of patient portal parameters, click **Published Messages**. The **Show Patients with Published Messages** area appears in the right pane.
5. Using the following table, select the specific parameters patients must meet to display in the report.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Read Date</td><td>To include only patients who read a message before, following, or around a specific date or time frame:<br>1. Select the Read Date check box.<br>2. In the list, select a time frame option, the EMR displays additional entry fields specific to the time frame option you select.<br><br><br>3. Enter a date or time frame as required.</td></tr>
</table>

| | |
|---|---|
| **Read Status** | To include only patients who have read or unread messages:<br>1. Select the **Read Status** check box.<br>2. In the list, select to include only patients that have **Read** or **Unread** messages.<br> |

6. To exclude patients who meet the criteria defined in the above table, above the **Show Patients with Published Messages** area, select the **Exclude Matches** check box.
7. To include all providers' patients in the report, at the top of the window, select the **Search All Patients** check box.
8. Click **Show Search Results as a Patient List** (). A list of matching patients appears.

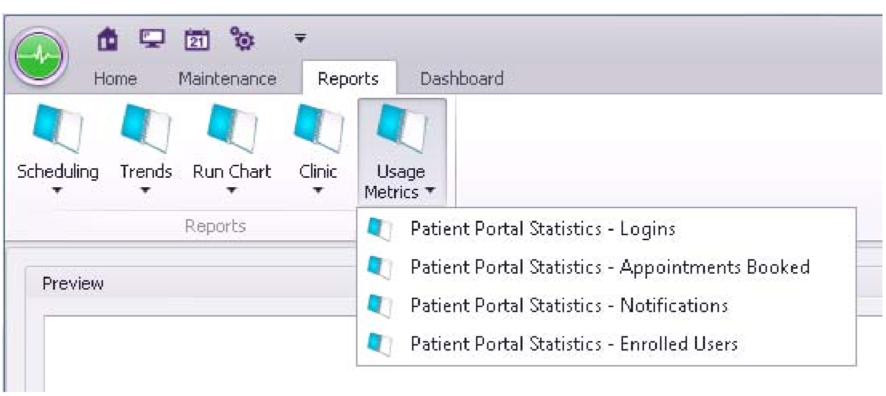
## Monitoring patient portal usage

If you want to know how many of your patients are enrolled on the patient portal, and how your patients are using the patient portal, you can view and save statistics on patient portal usage. You can view reports for:

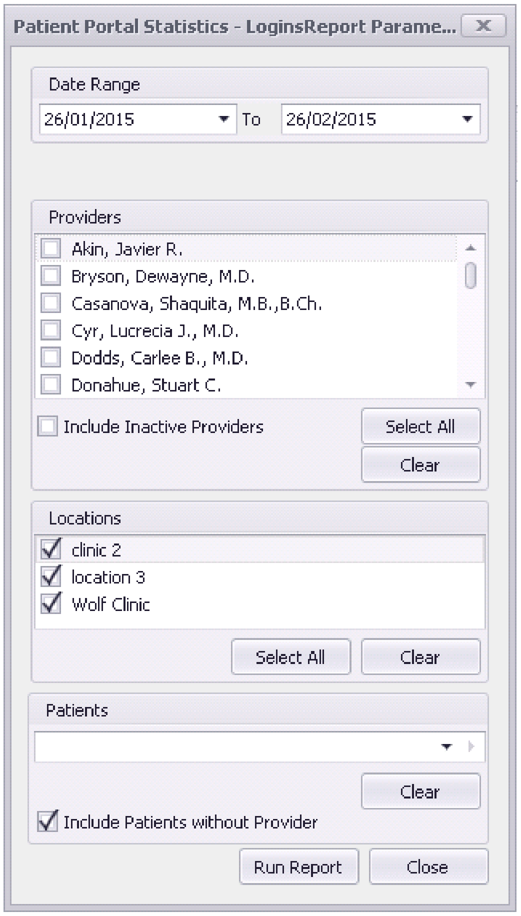
- Logins
- Appointments booked
- Notifications
- Enrolled users

### Steps

1. On the Wolf EMR Home page, click the **Reports** tab.
2. On the **Reports** toolbar, click **Usage Metrics**.



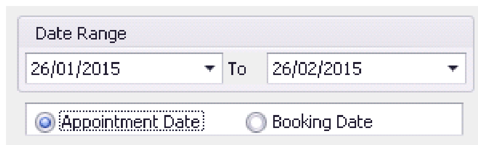
3. From the list of statistics reports, double-click the report you want. A report filtering window opens.

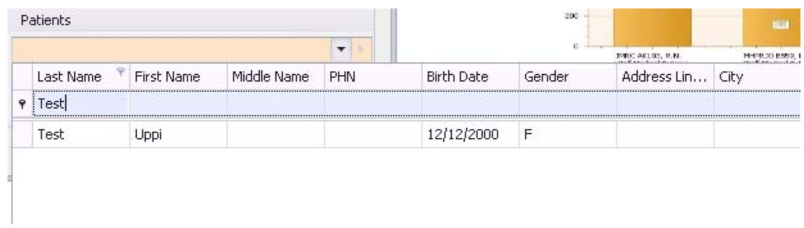



**Note:** The filtering window may have different options depending on the report you are producing.

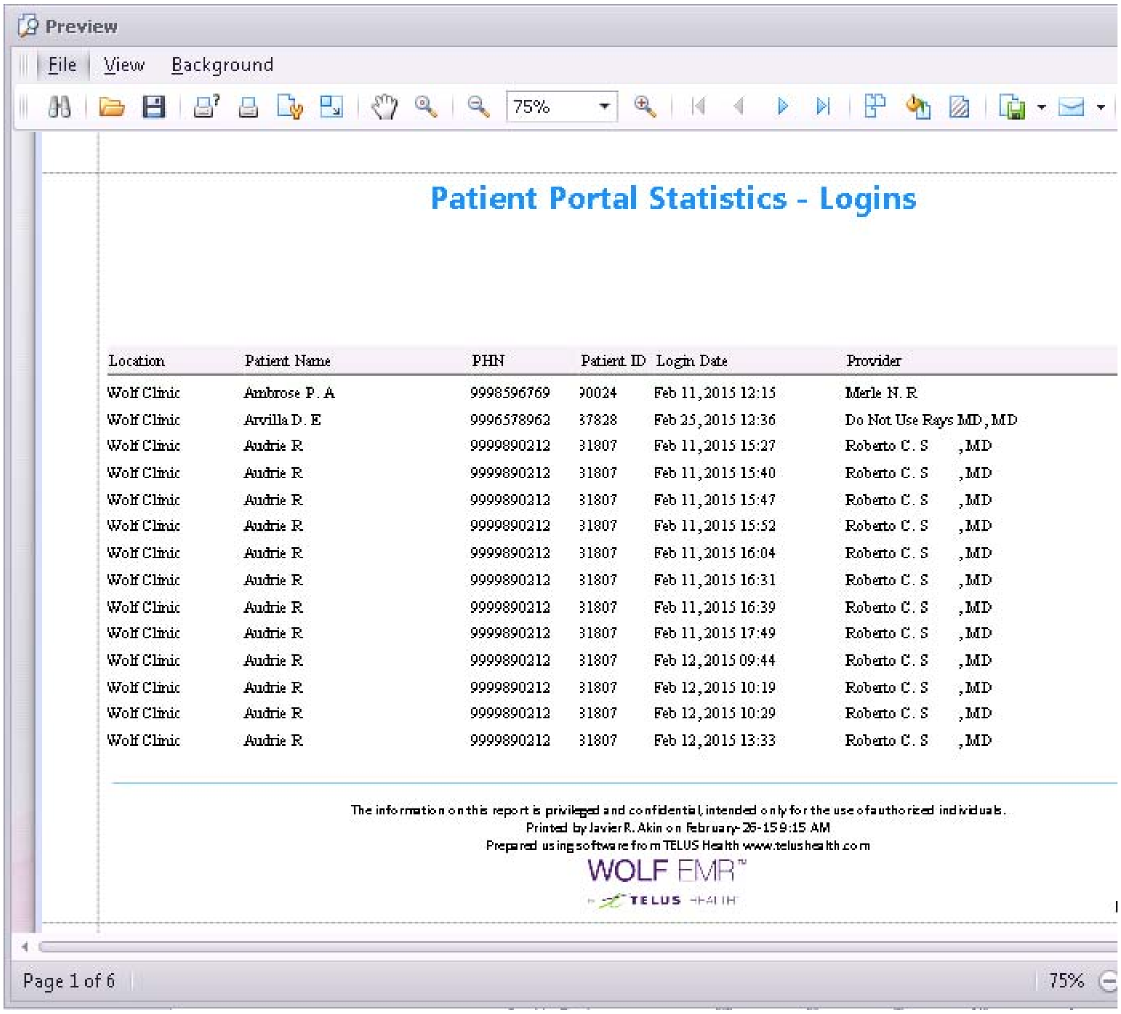
4. Using the following table, select the information you want to view.

| Filtering area | Instructions |
|---|---|
| **Date Range** | Enter the start date and end date for which you want to view statistics for. |

| | |
|---|---|
| **Appointment date**<br><br>**Booking date** | If you are producing a report for **Appointments Booked**, below the **Date Range** area, click one of the following options:<br><br>■ **Appointment Date**: To limit the date range by date of scheduled appointment.<br><br>■ **Booking Date**: To limit the date range by date of appointment booking.<br><br> |
| **Providers** | Select the check box beside the provider(s) whose patients you want to view statistics for.<br><br>To include statistics for patients whose primary provider is now inactive, select the Include Inactive **Providers** check box.<br><br>**Tip**: To view patient portal statistics for all providers at once, in the **Providers** area, click **Select All**. The EMR automatically selects all providers listed.<br><br>If all providers are selected, but you only want to view statistics for one or two, in the **Providers** area, click **Clear**. The EMR automatically clears the check box beside all providers listed. You can now select the check box beside the provider(s) you want. |
| **Locations** | Select the check box beside each location you want to view statistics for.<br><br>**Tip**: To view patient portal statistics for all locations at once, in the **Locations** area, click **Select All**. The EMR automatically selects all locations listed.<br><br>If all locations are selected, but you only want to view statistics for one or two, in the **Locations** area, click **Clear**. The EMR automatically clears the check box beside all locations listed. You can now select the check box beside the location(s) you want.<br><br>**Note:** : This option is not available for the **Notifications** report. |

<table>
<tr>
<td>Patients</td>
<td>To view statistics for only one patient:<br>
1. In the drop-down list in the Patient area, click the patient you want to view statistics for.<br>
2. If the patient list is extensive and you cannot find the patient you want, in the top row of the patient list, enter the patient’s last name. The EMR filters the list to display only matching names.<br>

<br>
3. Click the patient you want to view statistics for.<br>
4. To include patients who do not have a primary provider defined in the Patient Maintenance window, select the Include Patients without Provider check box.</td>
</tr>
</table>

5. Click **Run Report**. The EMR displays a preview of the report.




Patient Portal Statistics - Logins

| Location | Patient Name | PHN | Patient ID | Login Date | Provider |
|---|---|---|---|---|---|
| Wolf Clinic | Ambrose P. A | 9998596769 | 90024 | Feb 11, 2015 12:15 | Merle N. R |
| Wolf Clinic | Arvilla D. E | 9996578962 | 37828 | Feb 25, 2015 12:36 | Do Not Use Rays MD, MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 15:27 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 15:40 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 15:47 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 15:52 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 16:04 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 16:31 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 16:39 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 11, 2015 17:49 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 12, 2015 09:44 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 12, 2015 10:19 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 12, 2015 10:29 | Roberto C. S ,MD |
| Wolf Clinic | Audrie R | 9999890212 | 31807 | Feb 12, 2015 13:33 | Roberto C. S ,MD |

The information on this report is privileged and confidential, intended only for the use of authorized individuals.
Printed by Javier R. Akin on February-26-15 9:15 AM
Prepared using software from TELUS Health www.telushealth.com
WOLF EMR™
TELUS HEALTH

6. To save (export) the report in a specific format, click **File** > **Export Document** and choose a file format. Select the export options you want, and then click **OK**.