

# Using the Patient Portal

## Activating Patient Portal

First, you must ask ICANotes to enable the Patient Portal functionality on your account. Call Support at 443-569-8778 or email [ticket@icanotes.com](mailto:ticket@icanotes.com) to request that these rules be enabled: **Patient Portal Sync**, **Direct Messaging**, and **Always Generate CCDs**. *Note: If you do not want patients having access to their medical record, please specify that you only want portal messaging enabled.*

Second, for each patient seen, you will need to do the following:

- Enter the patient's **Email** in Demographics.
- Make sure you are listed as the Assigned Provider.
- Check the **Enable** box directly below the Email field to enable the patient's access to the portal.

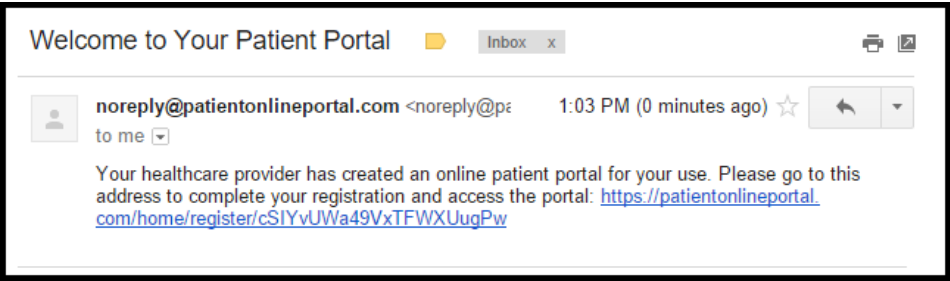
This screenshot shows the 'Demographics' form for a patient named John Smith. The form is divided into several sections: Patient Information, Insurance Information, Other Contacts, Patient Status, Patient's Condition, and Assigned Providers. The 'Patient Information' section includes fields for Name (John Smith), Date of Birth (6/18/1986), Age (29), Gender (man), and Email (johnsmith@gmail.com). The 'Patient Status' section has a 'Portal' checkbox checked. The 'Assigned Providers' section at the bottom shows 'Joy Testa' as the assigned provider. A red box highlights the 'Email' field and the 'Portal' checkbox.

This is a screenshot from the new demographic user interface:

This screenshot shows the 'Demographics' form for a patient named Shirley Winters. The form is divided into several sections: Patient Information, Episodes of Care, Insurance Information, Other Contacts, Patient Status, Patient's Condition, and Assigned Providers. The 'Patient Information' section includes fields for Name (Shirley Winters), Date of Birth (2/27/1958), Age (60), Gender (woman), and Email (patient@email.com). The 'Patient Status' section has a 'Portal' checkbox checked. The 'Assigned Providers' section at the bottom shows 'Jane Moody, LMFT' as the assigned provider. A red box highlights the 'Email' field and the 'Portal' checkbox.

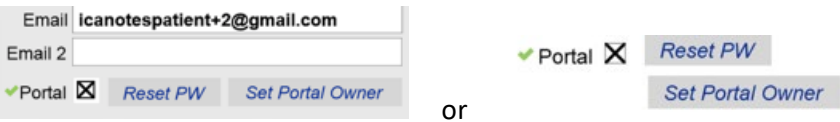
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The patient will receive the following email invitation to register for an account on the patient portal:

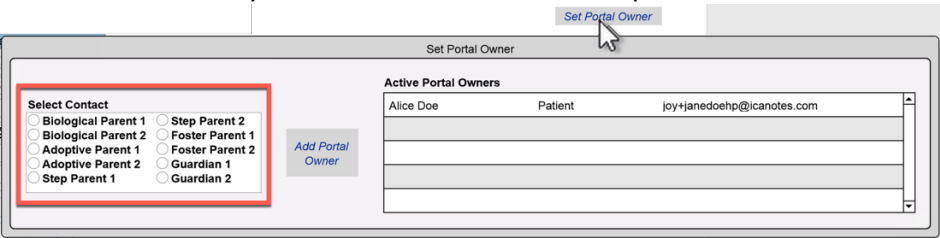


Note that the email invitation does not identify the name of your practice. This is to protect the patient’s privacy. You will want to make sure the patient is aware of the portal and how to use it. Please provide patients with the Patient Portal Instructions and encourage them to register and login.

You will be able to monitor whether or not a patient has accessed the portal from the Patient Information screen in Demographics. If the patient has registered and logged in successfully, a green check mark will appear by the Portal checkbox. A **Reset PW** button will also appear. If the patient needs to have their portal password reset, you can do that for them by clicking the **Reset PW** button.



Set Portal Owner is where you can set up additional portal owners. This is commonly used for parents of patients. Remember that every email address needs to be unique.



Portal Owners can be set up here:

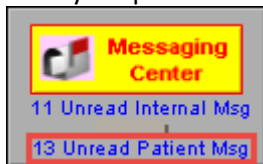
Medical Contacts		Family Contacts		Insurance Information		Other Contacts	
Name	Phone	Name	Phone	Name	Phone	Name	Phone
Biological Parent # 1		Step Parent # 1		Family History Entry			
Biological Parent # 2		Step Parent # 2					
Adoptive Parent # 1		Foster Parent # 1					
Adoptive Parent # 2		Foster Parent # 2					
Spouse		Guardian # 1					
Mother's Maiden Name First		Guardian # 2					

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**NOTE: CCDAs will only be generated for notes created AFTER you have enabled portal access for the patient in Demographics.**

Regularly check the **Patient Portal** section of the Messaging Center for secure messages from your patients.



**Messaging Center**

Internal Messages **Patient Portal**

Patient Portal For:  
**Joy Test4**

Create a New Message  
Select / Unselect Messages  
Delete Selected Messages

Unread messages are highlighted in BLUE

Select	Patient	Subject	Sent	Print
<input type="checkbox"/>	Eric Cartman	Is this a side effect of my medication?	1/14/2016 1:40:57 PM	
<input type="checkbox"/>	<b>Alphabet Test</b>	<b>Appointment Confirmed</b>	<b>12/23/2015 4:36:22 PM</b>	
<input type="checkbox"/>	Jane Doe	Appointment Cancellation Requested	12/23/2015 2:59:08 PM	

When you reply to a secure message from a patient, they will receive an email at their regular email address notifying them to check the portal for a secure message from their provider.

