



# Updox Patient's Guide

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May 2021

**CGM eMDs**

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EHR and Practice Management

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## **Publication date**

May 2021

## **Product**

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# Chapter 1 - Updox Patient's Guide

The Patient Portal provides a convenient and secure communication link between you and your healthcare providers. Instructions for using the Portal are provided in this document.

## Home Tab

When you log in to your Patient Portal, the Home tab will be selected. (Example shown below.)

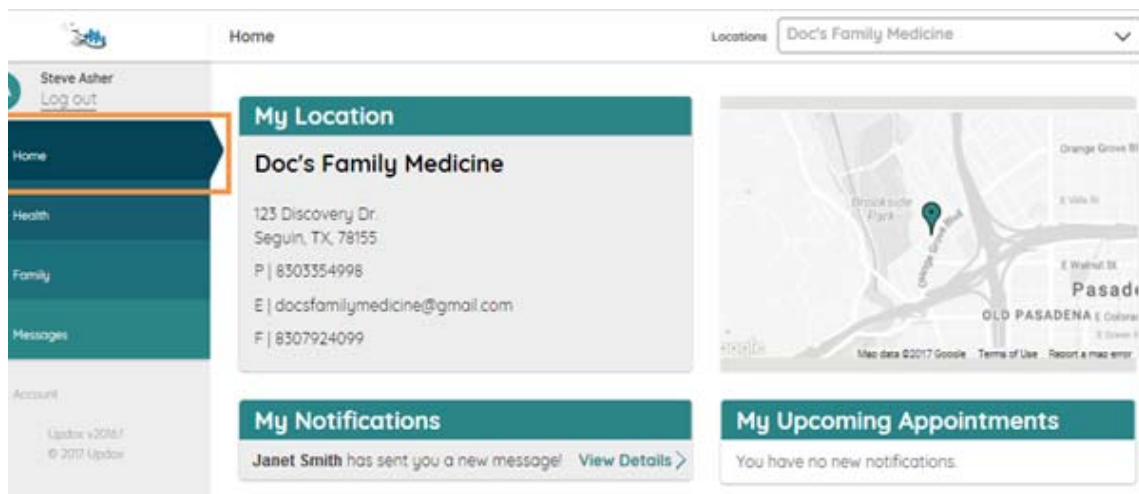


Figure 1. Updox window

## My Location

The My Location section on the Home tab provides information about the clinic that is currently selected in the Locations field in the upper right corner of the Portal.

If you see healthcare providers at another location associated with this clinic, you can display information about that location by clicking the drop-down button in the Locations field and then selecting the facility name.

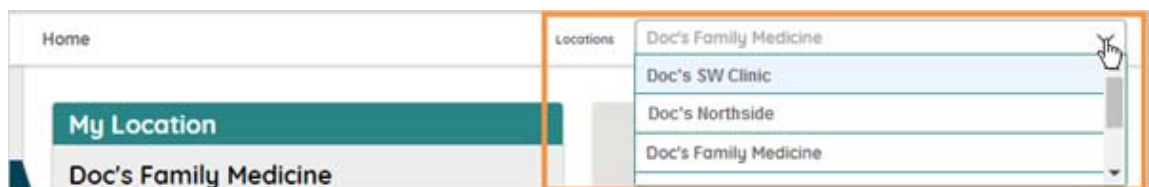


Figure 2. Home tab

## My Notifications

When a new message or health record is sent to your Patient Portal, the sender's name will be listed in the My Notifications section on the Home tab.

To display the contents of a new message or health record, click the View Details link.

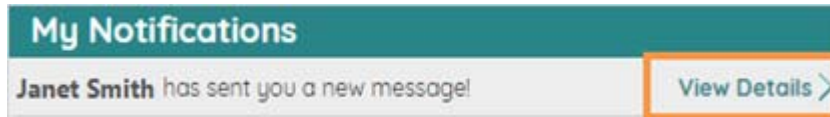


Figure 3. My Notifications

## Health Tab

On the Health tab of the Patient Portal, there are two sections: My Records and My Medications. Instructions for using each section are provided below.

(Note that the My Medications section will be displayed only if your provider allows medication refill requests to be submitted through the Patient Portal.)

### My Records

When you click the Health Tab, the My Records section will display a list of the health records that have been sent to your Patient Portal. The records will be listed by date, as shown in the example below.

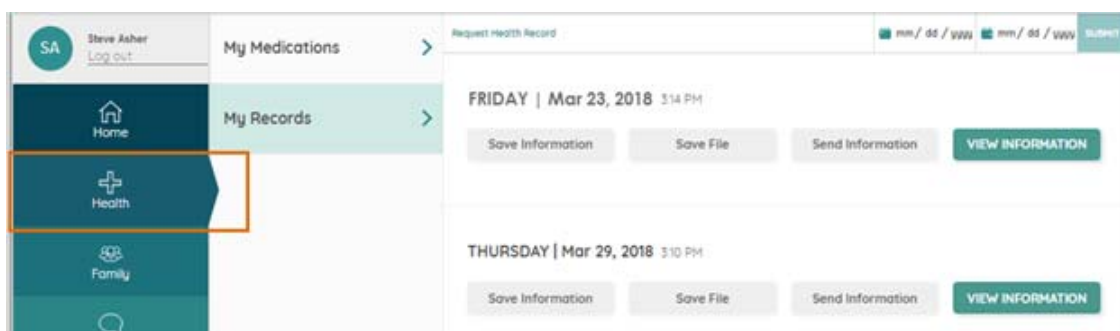


Figure 4. My Records tab

If no records are listed, click the green “Request Health Record” text located at the top of the Health tab. A copy of the most current health information in your chart will then be sent from the clinic to your Patient Portal. (It might take a few minutes for the health record to be transmitted to the Portal - light gray ellipses will be displayed in place of the “Request Health Record” text while the request is processing.)

### Save or Send a Health Record

If you want to save an HTML version of one of your health records to your computer, click the Save Information button.

- If you want to save an XML version of a health record to your computer, click the Save File button.
- If you want to send a health record to someone via email, click the Send Information button.

## Display Your Health Record

To display a health record, click the View Information button. The health record will be displayed on the Health tab, as shown in the example below.

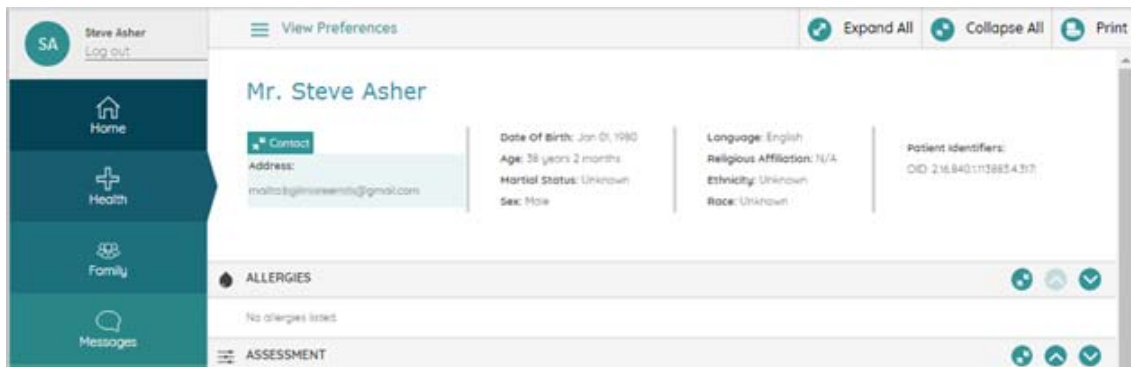


Figure 5. Health Record

- Before each section of the record, there will be a gray title bar containing the name of the section. In the example above, you can see the title bars for the Allergies section and the Assessment section.
- To quickly find a particular section of the health record, click the Collapse All button located at the top of the record and then use the Expand button in a section header to display that section.



Figure 6. Diagnostic Test Results

- To choose the sections that you want to see each time you view your health record, click View Preferences. If there is a check in the check box next to a section title, that section will always be displayed when you view your health record. To hide a section, remove the check mark. (Click the check box to remove a check mark - click again to add it back.) You can also move

sections up or down using the arrows to the right of the section title. Be sure to click the Save Preferences button.

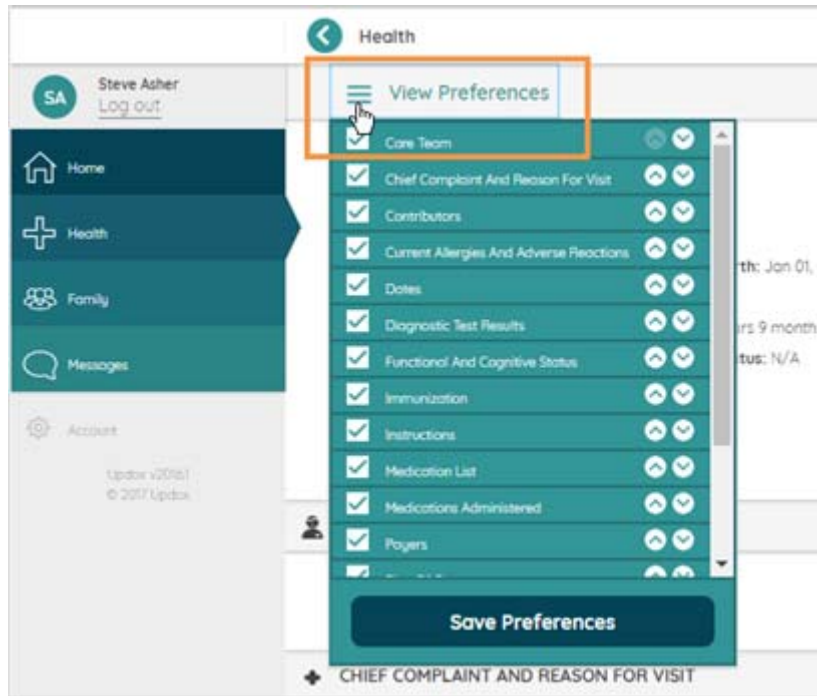


Figure 7. Health Record - Preferences

## Search for a Health Record from a Specific Date

You can use the date range buttons at the top of the Health Tab to search for a record within a specific time frame.



Figure 8. Date Range

## My Medications

In the My Medications section you can see a list of your medications, and you can request refills. To request a refill, click the check box next to the medication and then click the Request Refills button.

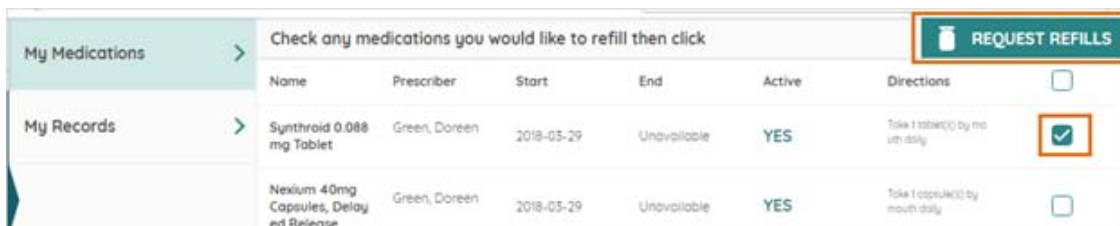


Figure 9. My Medications tab



# Messages Tab

Click the Messages tab to view a list of all the messages that you have sent or received.

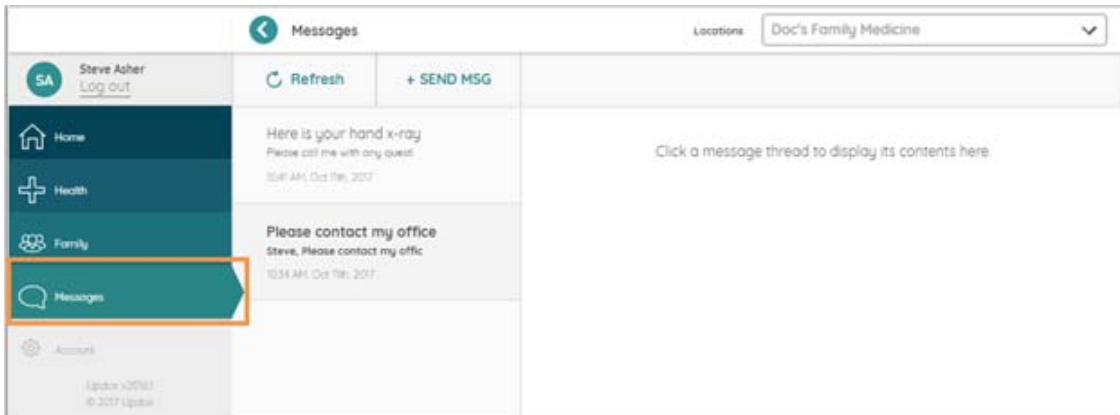


Figure 10. Messages tab

## View or Reply to a Message

- To view the contents of a message, click the message.

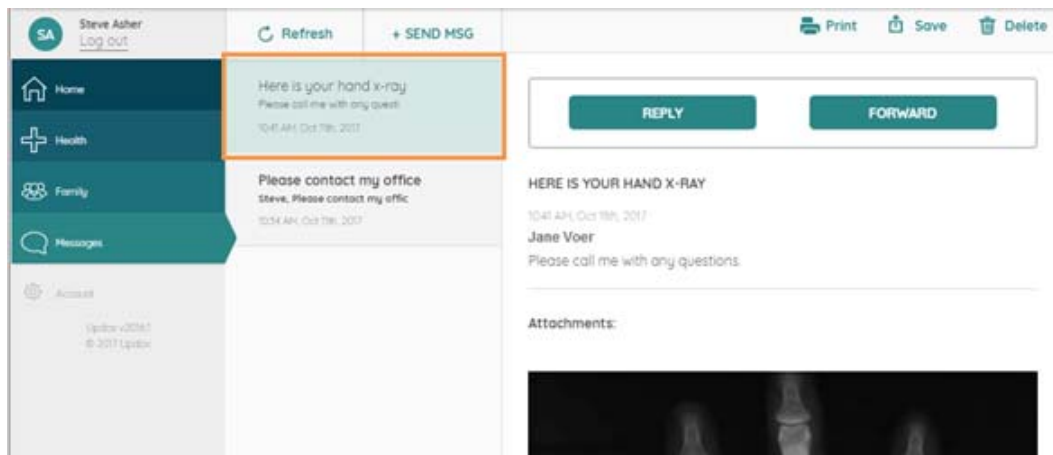


Figure 11. Messages tab

- Clicking the Reply button will display a field in which you can type a response to the message.

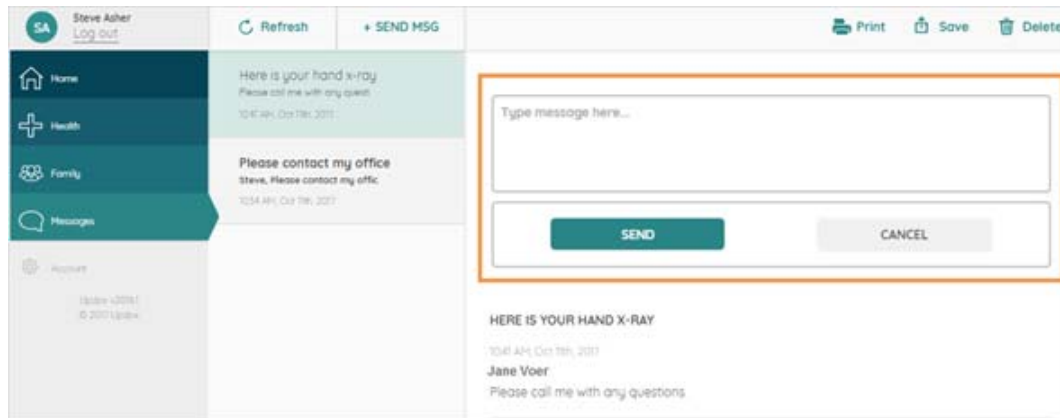


Figure 12. Messages tab

## Create a New Message

If you want to send a new message to your doctor or to clinic staff, click the SEND MSG button to display fields in which you can select the recipients and type a subject and a message.

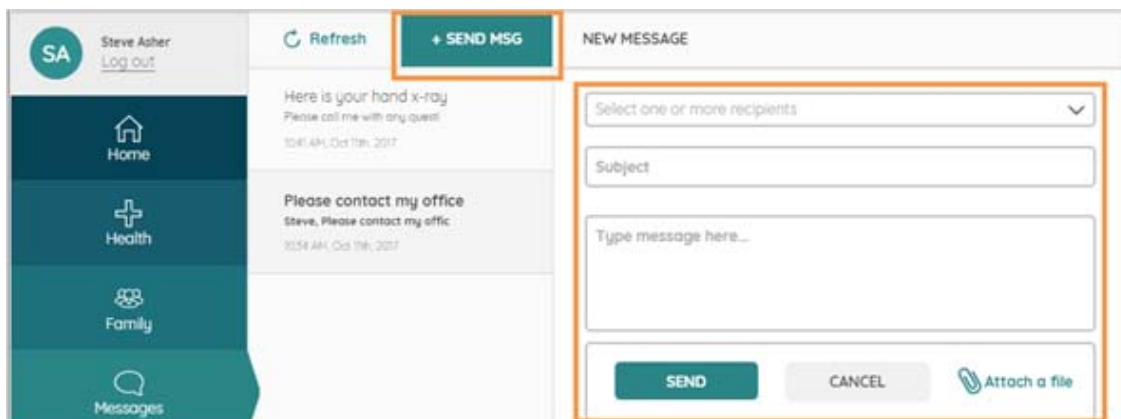


Figure 13. Messages tab

(You can add recipients by clicking the drop-down button and then selecting a recipient.)

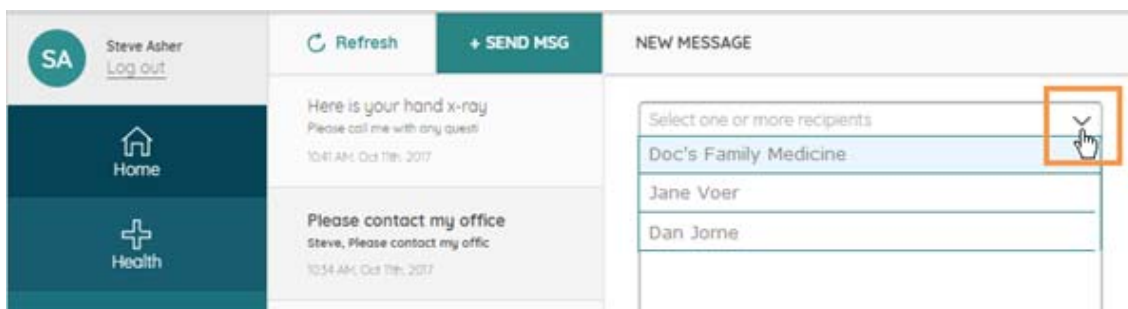


Figure 14. Messages tab

## Family Tab

If you log in to your Patient Portal and click the Family tab, you will see your name at the top of the tab, and there will be a check mark to the right of your name.



Figure 15. Family tab

You may also see a family member's name, with a SWITCH button to the right of their name. If you see a family member's name, that means they have granted you access to their Portal. (Instructions for granting access are provided in the Account Tab section of this document.)

The check mark to the right of a name tells you that person's health records and messages are currently being displayed in your Patient Portal, and the SWITCH button to the right of a name tells you that you can display that person's health records and messages in your Portal.

So, if you click the SWITCH button to the right of a family member's name, several things will happen:

- The Home, Health, and Messages tabs in your Patient Portal will display information pulled from the *family member's* Patient Portal. (In other words, if you click the SWITCH button and then click the Health tab, you will see the family member's health records instead of yours.)
- The SWITCH button next to the family member's name will change to a check mark to indicate that *their* health records are currently being displayed on the Home, Health, and Messages tabs.
- And the check mark to the right of your name will change to a SWITCH button.



Figure 16. Family tab

- To display *your* information on the Home, Health, and Messages tab again, click the SWITCH button next to your name.

## Appointments Tab

If your provider allows online scheduling, an Appointments Tab will be displayed. On the Appointments tab, you can schedule an appointment for a specific date and time - or you can request the first available appointment or an appointment within a particular timeframe. You can also view upcoming and past appointments.

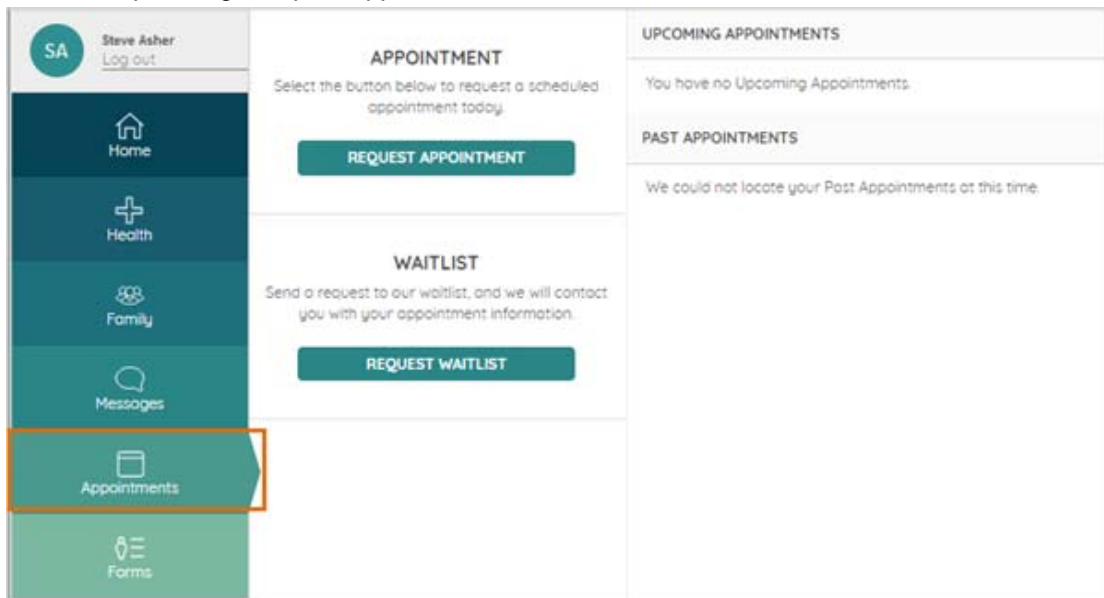


Figure 17. Appointments tab

## Schedule an Appointment

If you want to schedule an appointment with a specific provider on a specific date and time, click the REQUEST APPOINTMENT button to display the form shown below.

The screenshot shows a form for requesting an appointment. It contains four dropdown menus labeled 'Where:', 'With:', 'Reason:', and 'When:', each with a 'Select...' option and a downward arrow. Below these fields is a large, light gray button labeled 'REQUEST APPOINTMENT'.

Figure 18. Appointment

Use this form to provide the following information:

- **Where** - Click the drop-down button and select the location of the facility you wish to visit.
- **With** - Click the drop-down button and select the provider you want to see.
- **Reason** - Click the drop-down button and select the reason you want to see the doctor.
- **When** - Click the drop-down button and select a timeframe.

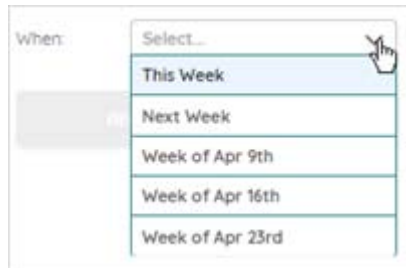


Figure 19. Timeframe selection

After you select a timeframe, the appointments available for that week will be displayed, as shown below. Click any appointment to select it.

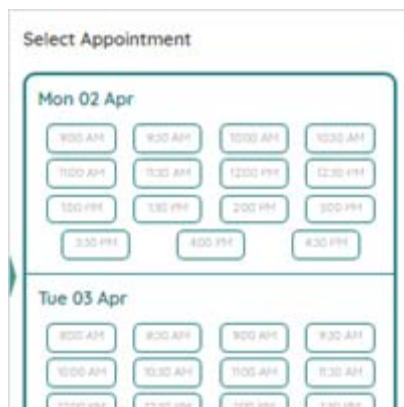


Figure 20. Select Appointment window

After you enter all the appointment information, click the REQUEST APPOINTMENT button again to schedule the appointment.

## Submit a Waitlist Request

This option allows you to request the first available appointment or request an appointment within a particular timeframe. If you want to use this option, click the REQUEST WAITLIST button to display the request form. (See example below.)

The screenshot shows a mobile application interface for submitting a waitlist request. On the left is a navigation menu with icons for Home, Health, Family, Messages, Appointments, and Forms. The main content area is titled 'WAITLIST' and contains the following fields:

- Where:** A dropdown menu with 'Select...' as the placeholder.
- Reason:** A dropdown menu with 'Select...' as the placeholder.
- When:** A section with a checked checkbox for 'First Available' and an 'OR' option. Below the 'OR' is a date field with a calendar icon and the format 'mm/ dd / yyyy'. Below the date field is a dropdown menu with 'between' selected.
- Time:** Two time selection fields, each with a dropdown menu showing 'AM'.
- Notes:** A text input field with the placeholder 'Add a message to your provider...'.

At the bottom of the form is a large blue button labeled 'REQUEST WAITLIST'.

Figure 21. Waitlist window

Use this form to provide the following information:

- **Where** - Click the drop-down button and select the location of the facility you wish to visit.
- **Reason** - Click the drop-down button and select the reason you want to see the doctor.
- **When** - If you want the first available appointment, you don't have to enter anything here - the First Available check box is automatically selected.

But if you want the appointment within a particular timeframe, you must *remove* the check mark in the First Available check box. (Click the check box to remove the check mark.) After you remove the check mark, you will be able to enter a date and timeframe for the appointment.

You can enter a date by clicking the calendar icon and selecting the date - or you can just click in the field and type the date in the format indicated (month/day/year). You can request that the appointment be scheduled between certain hours or before or after a certain hour. To select the timeframe in which you want the appointment, click the drop-down button and select between, before, or after, and then enter the time(s).

- **Notes** - If you want to include a message to your doctor, type the message in the Notes box.

After you have entered all appointment information, click the REQUEST WAITLIST button to send the request to the clinic. Someone will contact you to confirm the specific appointment date and time.

## Forms Tab

On the Forms tab, you can complete forms provided by your clinic and submit them for review.

The screenshot shows the 'Forms' tab interface. On the left is a navigation sidebar with options: Home, Health, Family, Messages, Appointments, Forms (highlighted), and Account. The main area is titled 'Forms' and contains a list of forms: 'Blood Pressure' and 'New Patient Inform...'. The 'Blood Pressure' form is selected and shown on the right. It has a 'Print' button, a 'Systolic Reading' field with the value '170', a 'Diastolic Reading' field with the value '80', and a 'Comments' field with the text 'Taken in left arm while sitting down.' Below the form are three buttons: 'CLEAR FORM', 'FINISH LATER', and 'SUBMIT'. An asterisk (\*) indicates a required field.

Figure 22. Forms tab

Click the form title (i.e. Blood Pressure) to display the form on the right-hand side. Required data fields will be noted with an asterisk (\*).

- **Clear Form** will clear all the data you've entered so you can start over.
- **Finish Later** will save your work and allow you to finish the form later.
- **Submit** sends the form with your data to the clinic.

# Account Tab

On the Account tab, you can change the information in your Portal profile, and you can give family members access to your Patient Portal.

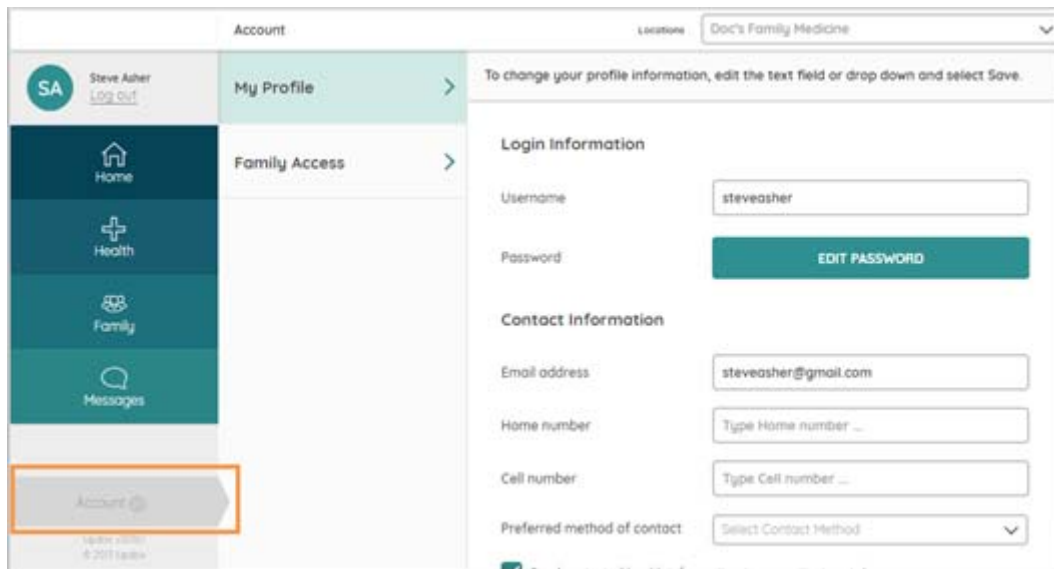


Figure 23. Account tab

## My Profile

In the My Profile section of the Account tab, you can change your Portal username and password, your contact information, and your preferred language, location, and time zone.

You can also stop the clinic from sending any more messages or health information to your Portal by removing the check from the 'Send protected health information to my patient portal' check box. (Click the check box to remove the check; click again if you want to add it back.)

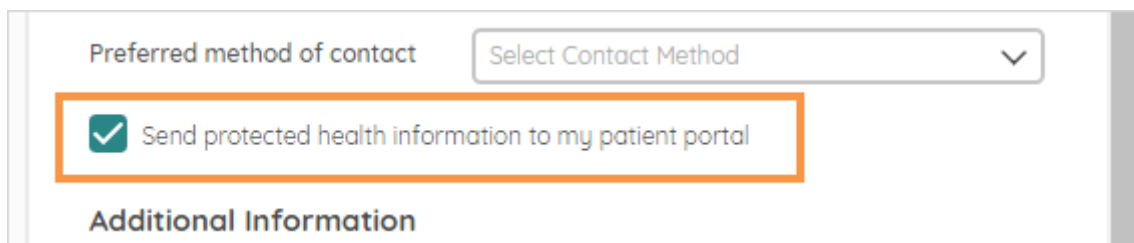


Figure 24. My Profile - Send protected health information check box

When you make changes, be sure to scroll to the bottom and click the SAVE button.

## Family Access

The Family Access section of the Account tab allows you to give family members access to your Patient Portal. There are two ways to provide access to your Patient Portal: You can **create a new**



**user**, or you can **grant access** to someone who already has a Patient Portal account with the clinic where you have your Patient Portal account. Both options are explained below.

- If you **create a new user** account for someone, you must give that person the link to the Patient Portal login page, along with the username and password for the account that you created for them. When the person enters the username and password in the login page for the Patient Portal, *your* Portal will be displayed, and they will be able to see all of your health records and messages.

To create a new user account, type the person's first name, last name, username, and password in the applicable fields. If you want the account to be disabled after a certain amount of time, enter an expiration date (this is optional). Click the CREATE USER button to finish creating the account.

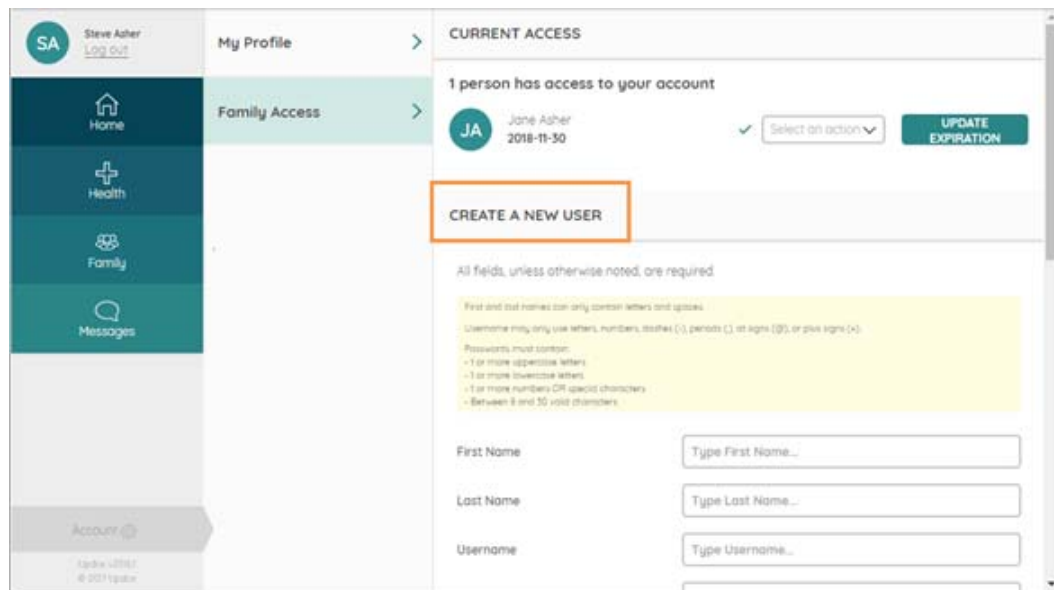
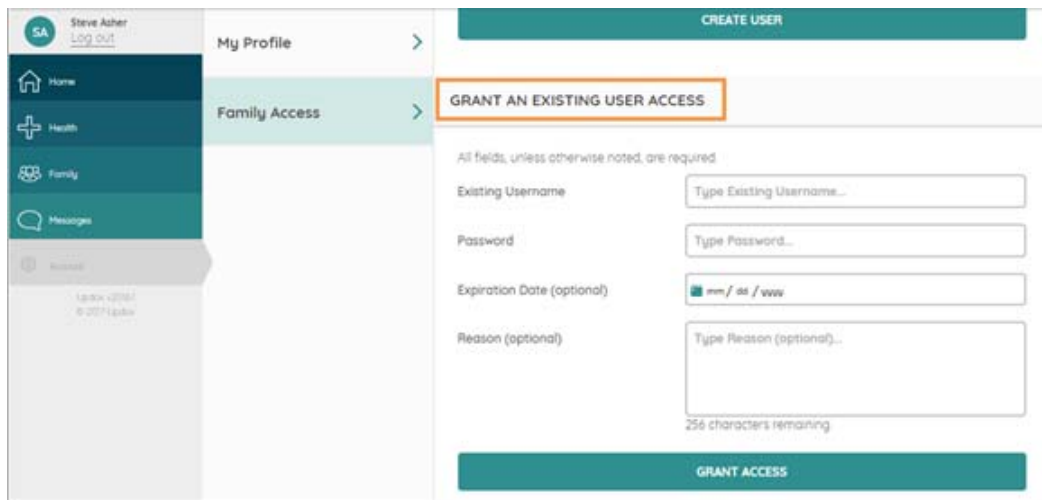


Figure 25. My Profile tab

- You can **grant access** to someone *only* if that person already has a Patient Portal account with the same clinic where you have your Patient Portal account. When you grant access to someone, they will be able to access *your* Portal information from within *their* Portal.

To grant access to someone, you must get the username and password for *their* Portal account, enter *their* username and password into the GRANT AN EXISTING USER ACCESS section of the Account tab on *your* Patient Portal, and click the GRANT ACCESS button.



The screenshot shows the 'Family Access' tab in the Updox Patient Portal. The left sidebar contains navigation options: Home, Health, Family, Messages, and Account. The 'Family Access' section is active, and the 'GRANT AN EXISTING USER ACCESS' option is highlighted with an orange box. Below this, there is a form with the following fields:

- Existing Username: Type Existing Username...
- Password: Type Password...
- Expiration Date (optional): mm / dd / yyyy
- Reason (optional): Type Reason (optional)...

A note above the form states: "All fields, unless otherwise noted, are required." A "GRANT ACCESS" button is located at the bottom of the form. A character count "256 characters remaining" is visible below the Reason field.

Figure 26. Family Access tab

The next time they log in to their Portal, they will see your name on the Family tab in their Portal - and if they click the SWITCH button next to your name, *your* health records and messages will be shown on the Health and Messages tabs in *their* Portal. (See the Family Tab section of this document for more information.)

## Log Out of the Portal

To log out of your Patient Portal, click the LOG OUT link located under your name in the upper left corner of the Patient Portal.