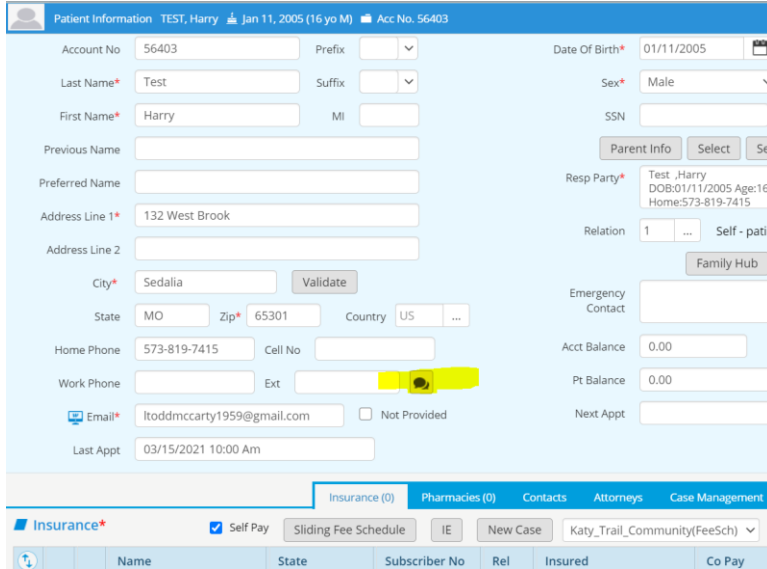


Procedure for setting up patient in patient portal

- Look up patient.
- Click on Info tab.
- Click on the highlighted icon below:



Patient Information TEST, Harry Jan 11, 2005 (16 yo M) Acc No. 56403

Account No 56403 Prefix [dropdown] Date Of Birth* 01/11/2005 [calendar icon]

Last Name* Test Suffix [dropdown] Sex* Male [dropdown]

First Name* Harry MI [dropdown] SSN [input]

Previous Name [input] Parent Info [button] Select [button] Set [button]

Preferred Name [input] Resp Party* Test ,Harry
DOB:01/11/2005 Age:16Y
Home:573-819-7415

Address Line 1* 132 West Brook Relation 1 ... Self - patie
Family Hub [button]

Address Line 2 [input]

City* Sedalia [button] Validate [button] Emergency Contact [input]

State MO Zip* 65301 Country US ... Acct Balance 0.00

Home Phone 573-819-7415 Cell No [input] Pt Balance 0.00

Work Phone [input] Ext [input] [highlighted icon] Next Appt [input]

Email* Itoddmccarty1959@gmail.com [checkbox] Not Provided

Last Appt 03/15/2021 10:00 Am

Insurance (0) Pharmacies (0) Contacts Attorneys Case Management

Insurance* [checkbox] Self Pay Sliding Fee Schedule [checkbox] IE [checkbox] New Case Katy_Trail_Community(FeeSch) [dropdown]

Name	State	Subscriber No	Rel	Insured	Co Pay

- The user name will autofill with first name, last name year of birth (JaySmith1990) Fill out the information like below. Make sure to click web enable and choose some generic password – Portal123.

How To Set up a Patient on Patient Portal

Patient Communication Settings TEST, Amy Feb 5, 1990 (31 yo F) Acc No. 55457 660-826-4774 821 WESTWOOD DR SEDALIA MO-65301-2102

Communication Types Status: Not Web Enabled

Patient Portal Login Credentials (Primary)

Username * amytest1990
 Email * ltodd-mccarty@katytrail.org

Account Type & Accessibility

Type Self Managed Proxy Managed

Reminder Types More

Select All

Appointments
 Lab Results
 Health Maintenance
 Rx Confirmation
 General Notification

Web Enable

Note: Self Manage has complete access rights

Voice Enabled English Spanish
 Home (660-826-4774) Morning

Text Enabled English Spanish
 Cell (660-826-4774)

Notes

Max 255 characters (255 characters remaining) Patient opts out all practice communication

Log Send Message Now OK Close

Communication Types Status: Web Enabled

Set Password

Username * amytest1990

Set Password * [masked]
 Confirm Password * [masked]

Type & Accessibility

Self Managed Proxy Managed

Voice Enabled English Spanish
 Home (660-826-4774) Morning

Text Enabled English Spanish

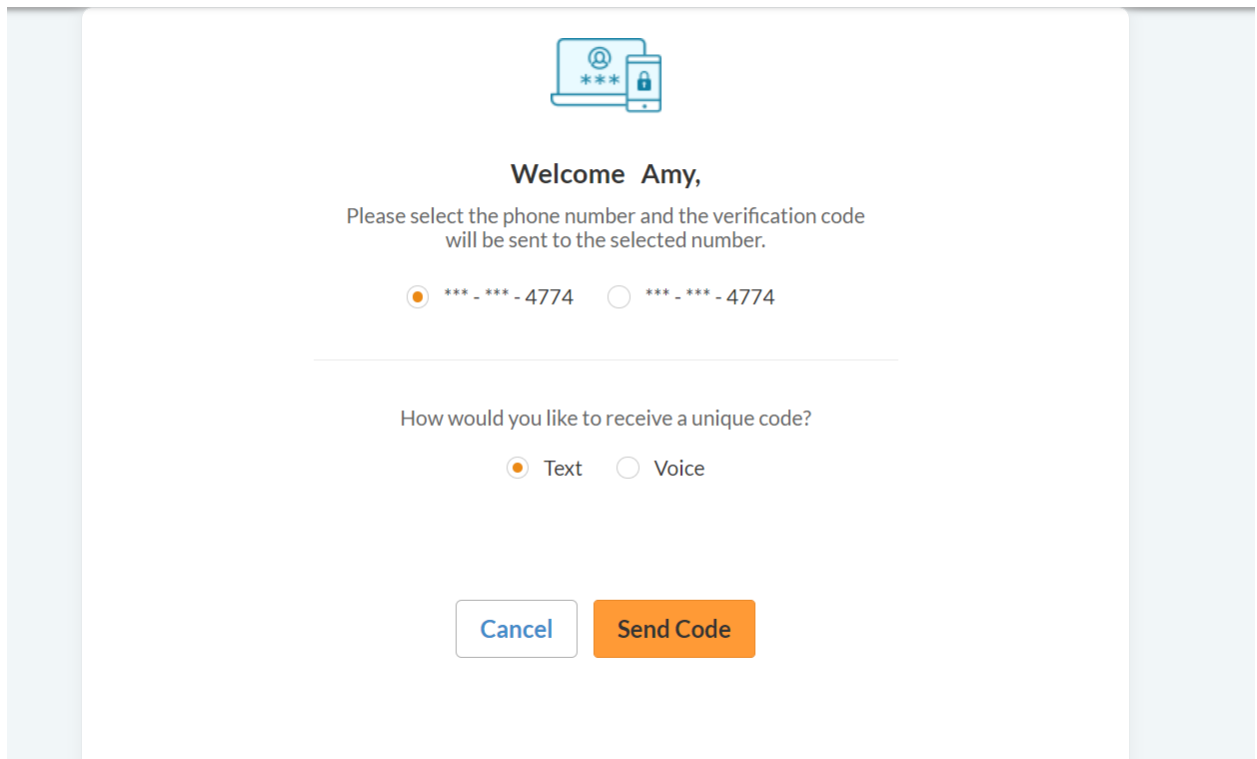
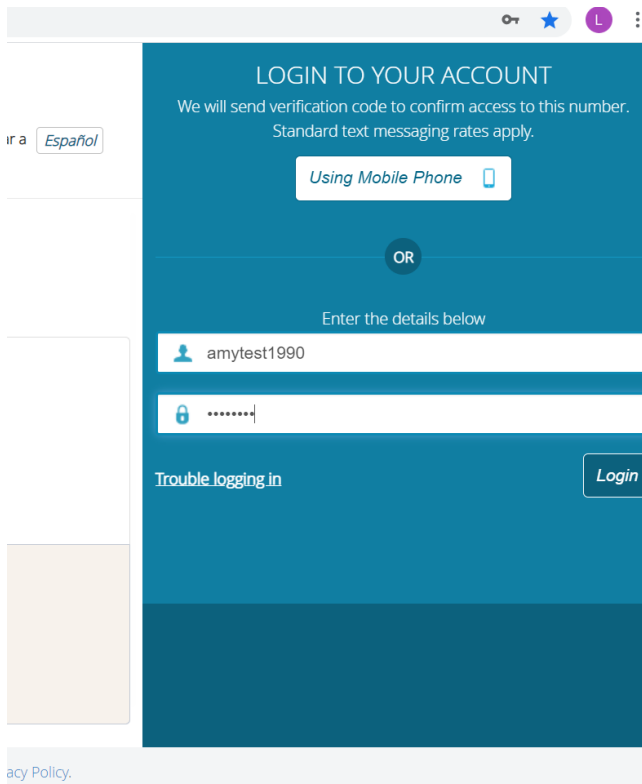
Save & Print Save Cancel

Set Password Reset Password Unlock Disable

Note: Self Manage has complete access rights

- Once you do this they can go to website – Katy Trail Community Health and hit patient portal:

How To Set up a Patient on Patient Portal



- Once they hit send the code a place will open to put the code in:

How To Set up a Patient on Patient Portal

Verification Code

Please enter the verification code we sent to your phone number *** - *** - 7415

Code is valid for 5 minutes or 6 attempts
Didn't receive the code?
[Resend Code](#)

Please enter the verification code you received

-
- Once you put in the code it will prompt them to change the password:

Reset Password

Congratulations, You have authenticated yourself.
Please Select your new Password.
Refer [Password GuideLines](#) to create secure passwords.

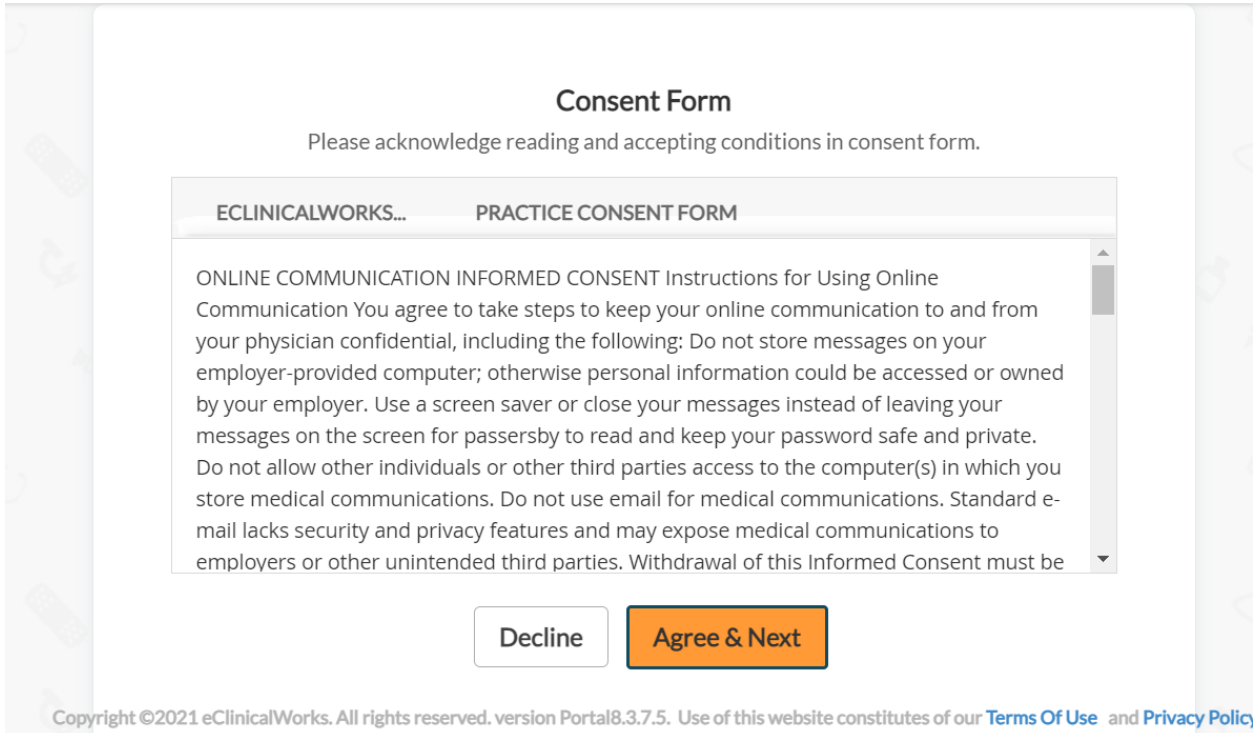
New Password

Confirm New Password

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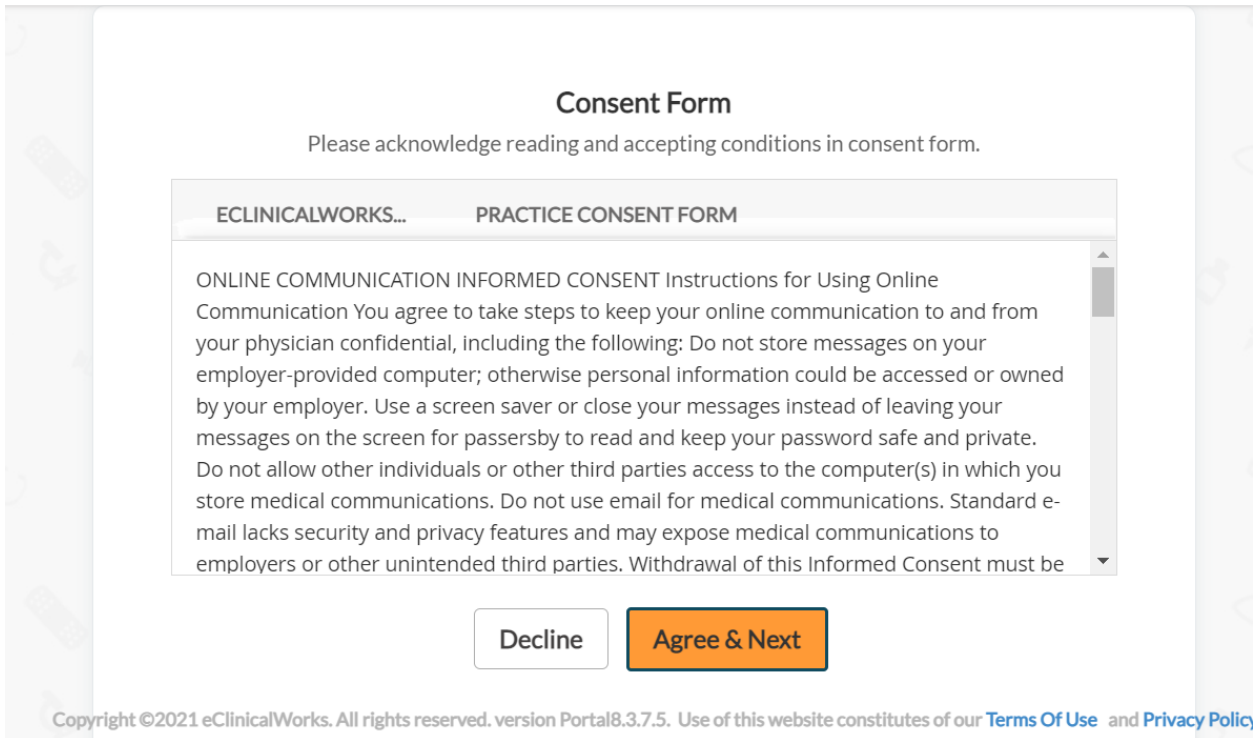
-
- Next the need to agree:
-

How To Set up a Patient on Patient Portal



The screenshot shows a web browser window with a tab titled "ECLINICALWORKS... PRACTICE CONSENT FORM". The page content includes the heading "Consent Form" and the instruction "Please acknowledge reading and accepting conditions in consent form." Below this is a scrollable text area containing the following text: "ONLINE COMMUNICATION INFORMED CONSENT Instructions for Using Online Communication You agree to take steps to keep your online communication to and from your physician confidential, including the following: Do not store messages on your employer-provided computer; otherwise personal information could be accessed or owned by your employer. Use a screen saver or close your messages instead of leaving your messages on the screen for passersby to read and keep your password safe and private. Do not allow other individuals or other third parties access to the computer(s) in which you store medical communications. Do not use email for medical communications. Standard e-mail lacks security and privacy features and may expose medical communications to employers or other unintended third parties. Withdrawal of this Informed Consent must be". At the bottom of the scrollable area are two buttons: "Decline" and "Agree & Next". Below the browser window, there is a copyright notice: "Copyright ©2021 eClinicalWorks. All rights reserved. version Portal8.3.7.5. Use of this website constitutes of our [Terms Of Use](#) and [Privacy Policy](#)".

-
- The portal will open and they can see their information:



This screenshot is identical to the one above, showing the "Consent Form" interface with the same text and buttons. It also includes the copyright notice at the bottom: "Copyright ©2021 eClinicalWorks. All rights reserved. version Portal8.3.7.5. Use of this website constitutes of our [Terms Of Use](#) and [Privacy Policy](#)".