

# MyChart

## Patient Guide



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# Getting Started

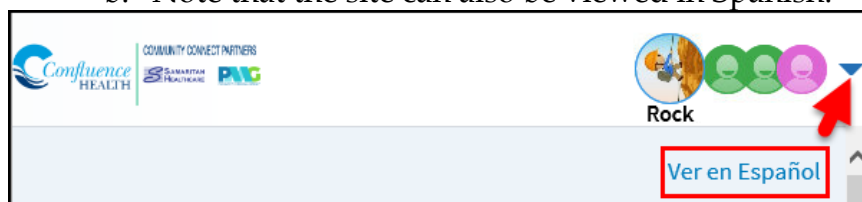
Congratulations on signing up for MyChart! You now have access to your medical records, your care team, and much more. Now that you have signed up, you need to know how to access and navigate MyChart.

## Important Contact Information:

Patient Services: 1 (888) 499-4801

## Access MyChart





1. To access MyChart's log-in page, type <https://mychart.confluencehealth.org/MyChart> in the address bar of your internet browser.
2. Enter the username and password that you selected when signing up for MyChart. If you are unable to login for any reason, contact our Patient Services department at **1-888-499-4801**.
3. The Home Page has buttons across the top to access different activities.
  - a. Circular buttons are patients that you have Proxy Access for.
  - b. Note that the site can also be viewed in Spanish.



## General

In the center of your home page is your notification area as well as your To Do events.

### Welcome!

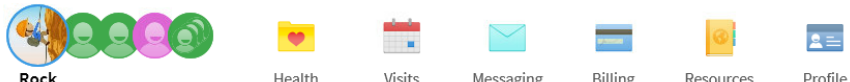
-  Read your messages. You have 50 new messages.
-  Schedule appointments for your current health reminders. 5 reminders need your attention.
-  View your 2 accounts with a payment due.
-  View the After Visit Summary from your recent visit on 4/4/2019.

### To Do

|                           |                               |   |            |   |   |    |    |    |    |   |
|---------------------------|-------------------------------|---|------------|---|---|----|----|----|----|---|
| Overdue health reminders  | <a href="#">REQUEST APPT</a>  | < | April 2019 |   |   |    |    |    |    | > |
| Mammogram                 |                               |   | S          | M | T | W  | T  | F  | S  |   |
| <b>Mammogram</b>          |                               |   |            |   | 1 | 2  | 3  | 4  | 5  | 6 |
| Annual Diabetic Foot Exam | <a href="#">SCHEDULE APPT</a> |   | 7          | 8 | 9 | 10 | 11 | 12 | 13 |   |
| <b>Overdue</b>            |                               |   |            |   |   |    |    |    |    |   |

## What is the main toolbar?

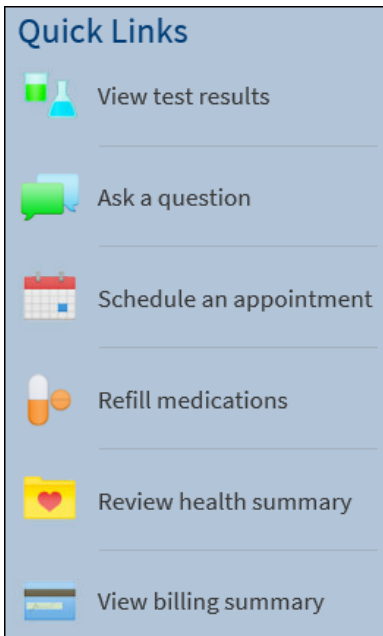
At the top of the screen is your main toolbar. Click on the different profiles to view that account if applicable. Access more in-depth information by clicking the icons to the right of the profile picture.





**Rock**    Health    Visits    Messaging    Billing    Resources    Profile

## Quick Links

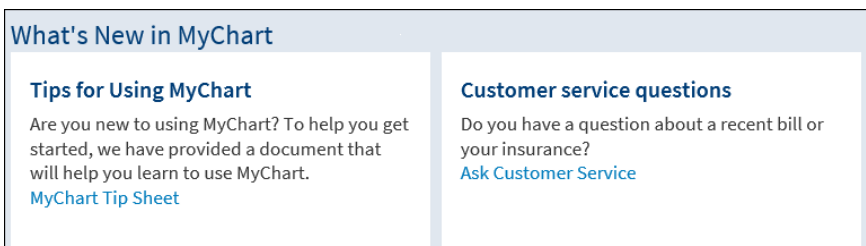
Along the right of your screen are your **Quick Links** to common activities.



## Care Team

A list of providers you've seen appears along the right side of the screen. Directly message or schedule with a provider by clicking the  or the  icons.

## What's New in MyChart

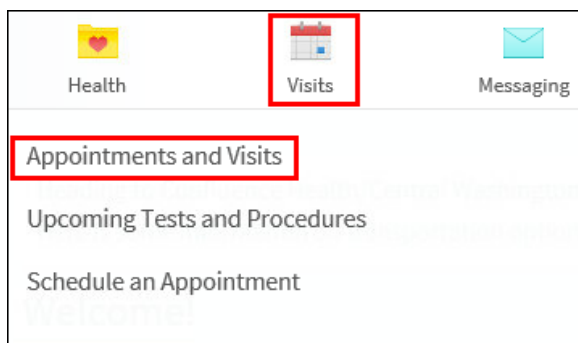
A screenshot of the 'What's New in MyChart' section. It features a light blue header with the title 'What's New in MyChart'. Below the header, there are two columns of text. The left column is titled 'Tips for Using MyChart' and contains the text: 'Are you new to using MyChart? To help you get started, we have provided a document that will help you learn to use MyChart. [MyChart Tip Sheet](#)'. The right column is titled 'Customer service questions' and contains the text: 'Do you have a question about a recent bill or your insurance? [Ask Customer Service](#)'.

# Documents

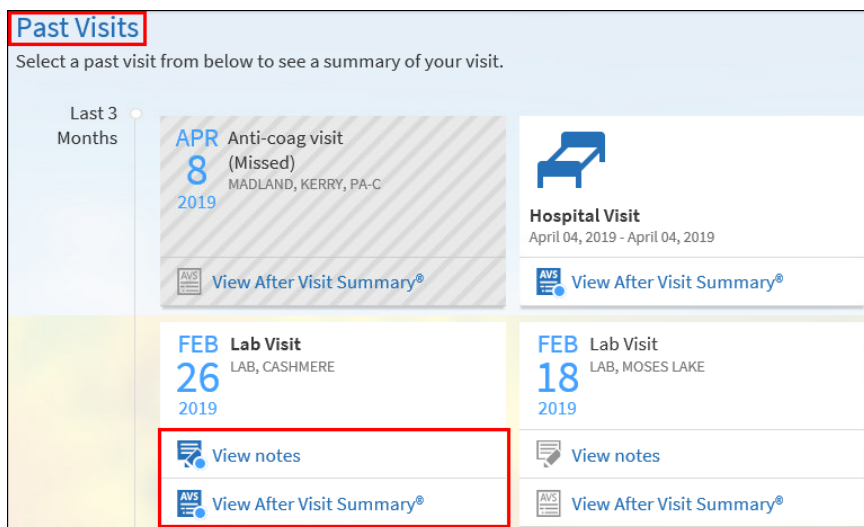
## View a Visit's Note

Some providers may elect to share their progress note from your visit with you. You will access these notes with the Visits button.

1. Hover over **Visits** and select **Appointments and Visits**.

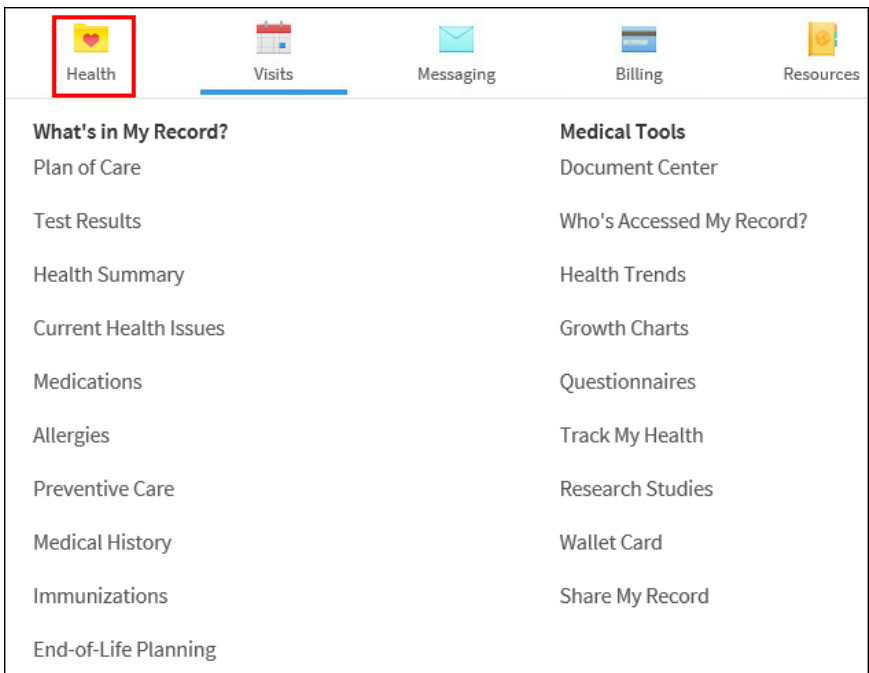


2. Scroll down to the **Past Visits** section to view the available options.



# Health

Under **Health**, you have access to everything from test results to your allergies. **Most – not all – results will now be sent via MyChart and will no longer be sent in the mail.** You will receive an email directing you to check your MyChart for your test results.



The screenshot shows the MyChart interface with the 'Health' tab selected. The 'Health' tab is highlighted with a red box. Below the navigation bar, there are two columns of menu items. The left column is titled 'What's in My Record?' and includes: Plan of Care, Test Results, Health Summary, Current Health Issues, Medications, Allergies, Preventive Care, Medical History, Immunizations, and End-of-Life Planning. The right column is titled 'Medical Tools' and includes: Document Center, Who's Accessed My Record?, Health Trends, Growth Charts, Questionnaires, Track My Health, Research Studies, Wallet Card, and Share My Record.

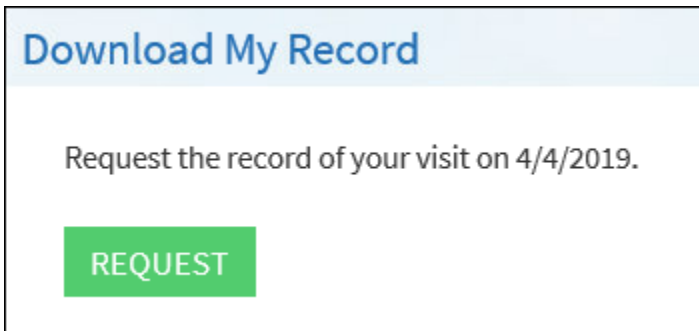
| What's in My Record?  | Medical Tools             |
|-----------------------|---------------------------|
| Plan of Care          | Document Center           |
| Test Results          | Who's Accessed My Record? |
| Health Summary        | Health Trends             |
| Current Health Issues | Growth Charts             |
| Medications           | Questionnaires            |
| Allergies             | Track My Health           |
| Preventive Care       | Research Studies          |
| Medical History       | Wallet Card               |
| Immunizations         | Share My Record           |
| End-of-Life Planning  |                           |

## Request Records for Download

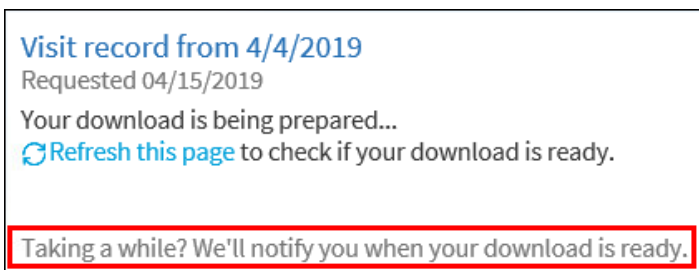
You can request to download certain copies of your medical record. You can view these by clicking Document Center.

1. Hover over **Health** and click **Document Center**.
2. Click **Visit Records**. A list of past appointments will appear. Select the visit you wish to download.
3. At the bottom of the page choose to **VIEW**, **DOWNLOAD** or **SEND**.

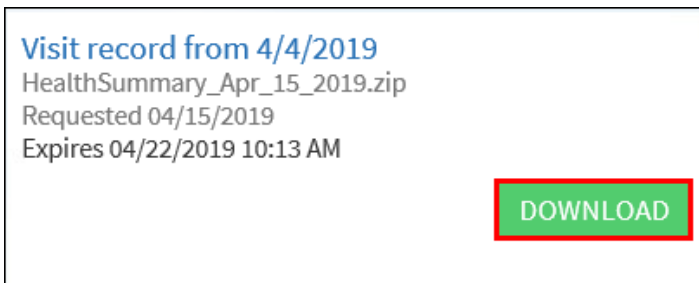
4. If you choose to Download, a pop up will appear, click **REQUEST**.



5. A status box will appear with the date you requested the download noted. Depending on the size of the document, you can also choose to be notified once the record is ready.



6. Once the document is ready, a **DOWNLOAD** button will appear.

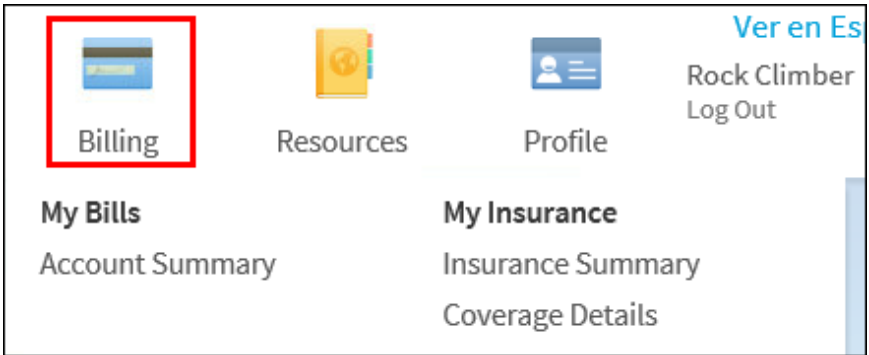




# Billing & Account

## Billing

You have access to your account for billing information under the Billing button. Here you can pay your bills, see your account summary, and what's been billed to insurance. Details about the insurance coverage that we have loaded in our system for you are also available.



Ver en Es  
Rock Climber  
Log Out

Billing Resources Profile

My Bills My Insurance

Account Summary Insurance Summary  
Coverage Details

## Customer Service Request

Use the **CUSTOMER SERVICE REQUEST** for questions regarding your bill or insurance information.

| Member       | Member Number | Date of Birth |
|--------------|---------------|---------------|
| Rock Climber | TJK123456789  | 12/28/1955    |

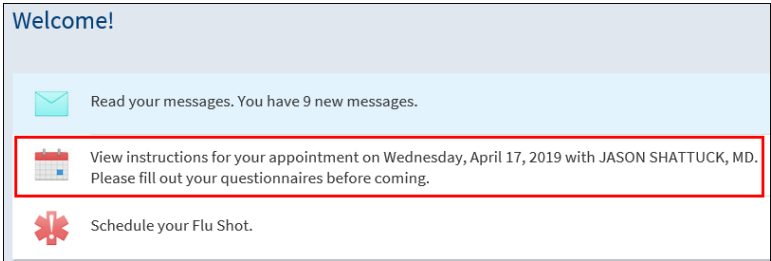
If you have a general question regarding coverages, submit a Customer Service Request.

**CUSTOMER SERVICE REQUEST**


## Co-pays


You can now pay your copay up to 5 days prior to your appointment via MyChart. We wait to charge the credit card until you come in for your visit. Your credit card is not charged before you receive service.


1. Click the Instructions section on your Welcome screen.



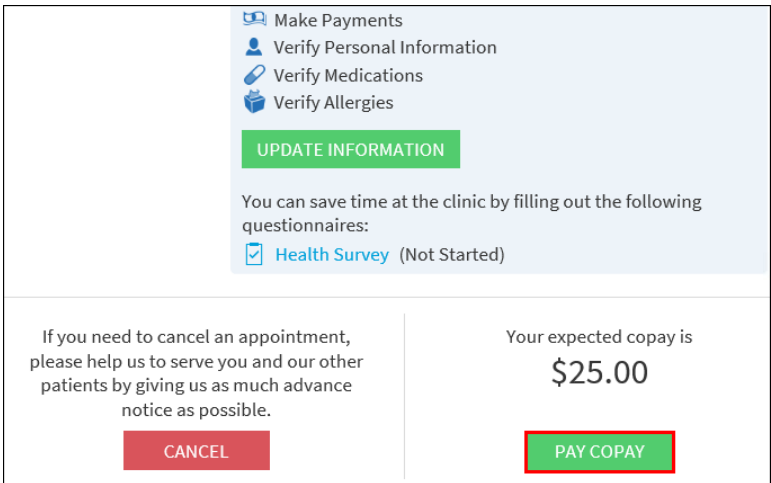
Welcome!





 Read your messages. You have 9 new messages.

 View instructions for your appointment on Wednesday, April 17, 2019 with JASON SHATTUCK, MD. Please fill out your questionnaires before coming.

 Schedule your Flu Shot.

2. Click **PAY COPAY**.



 Make Payments  
 Verify Personal Information  
 Verify Medications  
 Verify Allergies

**UPDATE INFORMATION**

You can save time at the clinic by filling out the following questionnaires:

**Health Survey** (Not Started)

If you need to cancel an appointment, please help us to serve you and our other patients by giving us as much advance notice as possible.

Your expected copay is  
**\$25.00**

**CANCEL** **PAY COPAY**

3. Verify if the visit is for a work-related injury. Click **NEXT**.

4. Click **PAY**.

Payment for This Visit

Copay

\$25.00 (Amount due)

5. Fill out the payment form. Click **NEXT**.

Enter payment information

Indicates a required field

**Name on card**  
ROCK CLIMBER

**Card number (Visa, MasterCard, or Discover)**  
0000000000000000

**Expiration date**  
05 / 20  
mm / yyyy

Save for future use

**Address**  
1234 CONFLUENCE WAY

**City**  
WENATCHEE

**State**  
Washington

**ZIP**  
98801

**Phone**  
5096638711

**Email**  
ROCKCLIMBER.COM

- A verification window will appear. If everything is correct, click **SUBMIT**.

### Payment

You're almost done!

Please verify that the information below is correct before processing your payment.

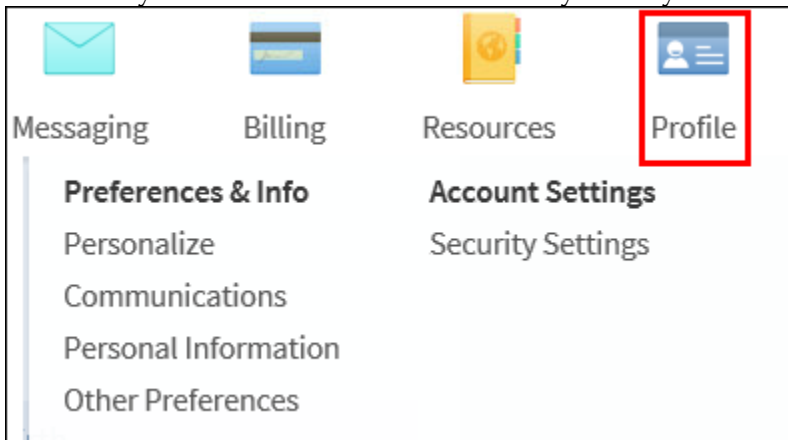
| Payment amount                  | Address   | Payment method                        |
|---------------------------------|---|---------------------------------------|
| <b>\$25.00</b><br>\$25.00 Copay | 1234 CONFLUENCE WAY<br>WENATCHEE, Washington 98801<br>5096638711<br>ROCKCLIMBER.COM | ROCK CLIMBER<br>x0000<br>exp. 05/2020 |

[BACK](#) [SUBMIT](#) [CANCEL](#)

- A confirmation window will appear once the payment has gone through.

## MyChart Account

Under **Profile**, you can access your demographics and preferences. You can also select **Notifications** to enter a new email address and set alerts (i.e. notifications when you have a message or test results). You will receive a notification to **Confirm** your contact information every 90 days.



# Appointments

## Request an Appointment

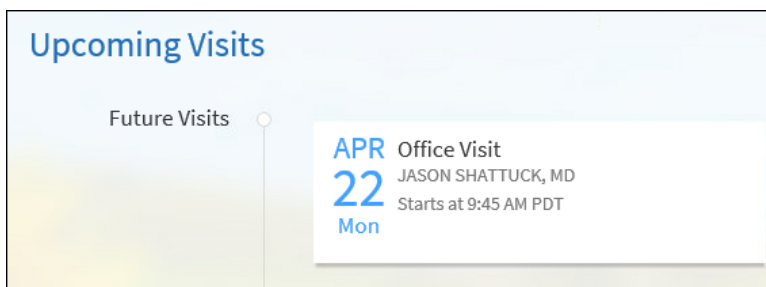
Request an appointment with a provider, hover over Visits and click Schedule an Appointment.

1. Choose from a provider you've seen in the past or from the list of reasons for the appointment. This will queue up different questions.
2. Choose the location you wish to be seen.
3. Set the preferred date range you'd like to be scheduled.
4. Click **Send Request**.

## Cancel an Appointment

If you need to cancel a future appointment, as much time as possible for notification is appreciated. Hover over Visits and click Appointments and Visits.

1. Click the appointment you wish to cancel from the list of **Upcoming Visits**.

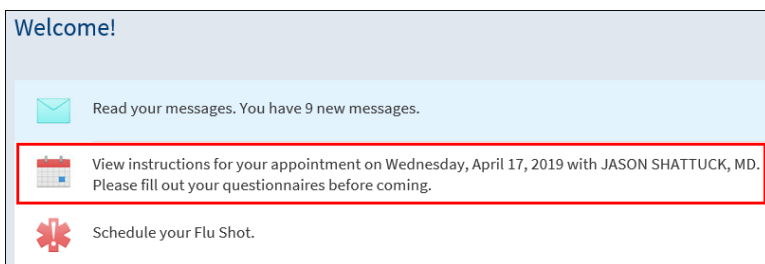


2. Click the **Cancel** button.
3. Enter a note as to the reason for cancellation.
4. Click **SEND**. A confirmation message will appear.


# Questionnaires



Your clinic may make questionnaires available from MyChart, so you can complete them online instead of filling out a form when you get to the clinic.

1. Once your care team sends you a questionnaire, you will receive an alert in your personal email.
2. You can access the questionnaire via the link in your email or from the Welcome screen when you see instructions for your upcoming appointment.



- a. If you'd rather print the form and bring it in, click the Print button.
3. A list of questions will appear, click the appropriate responses. Scroll down the screen to fill it out completely.
  4. As you fill out the pages, click **CONTINUE** at the bottom of the page to fill out the next form.

5. Once you get to the end of the Questionnaire you will have the opportunity to edit any responses by clicking the . When you are ready, click **SUBMIT**.

| Question   | Answer    |   |
|--|-----------|---|
| During your physical your doctor will give you a thorough exam. Are there any other areas of concern that you would like to discuss during your visit? | itchy ear |  |
| Have you been hospitalized since your last visit?  | No        |  |
| <p><a href="#">BACK</a> <a href="#">SUBMIT</a> <a href="#">FINISH LATER</a> <a href="#">CANCEL</a></p>   |           |   |

# Notes

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