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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

<table>
<thead>
<tr>
<th>Overdue health reminders</th>
<th>REQUEST APPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mammogram</td>
<td></td>
</tr>
<tr>
<td>Mammogram</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Diabetic Foot Exam</th>
<th>SCHEDULE APPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue</td>
<td></td>
</tr>
</tbody>
</table>

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.
Quick Links

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

<table>
<thead>
<tr>
<th>Quick Links</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>View test results</td>
<td></td>
</tr>
<tr>
<td>Ask a question</td>
<td></td>
</tr>
<tr>
<td>Schedule an appointment</td>
<td></td>
</tr>
<tr>
<td>Refill medications</td>
<td></td>
</tr>
<tr>
<td>Review health summary</td>
<td></td>
</tr>
<tr>
<td>View billing summary</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>What’s New in MyChart</th>
<th>Customer service questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tips for Using MyChart</td>
<td>Do you have a question about a recent bill or your insurance?</td>
</tr>
<tr>
<td>Are you new to using MyChart?</td>
<td>Ask Customer Service</td>
</tr>
<tr>
<td>To help you get started, we have provided a document that will help you learn to use MyChart.</td>
<td></td>
</tr>
</tbody>
</table>
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.

### 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.

Customer Service Request

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

<table>
<thead>
<tr>
<th>Member</th>
<th>Member Number</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rock Climber</td>
<td>TJK123456789</td>
<td>12/28/1955</td>
</tr>
</tbody>
</table>

If you have a general question regarding coverages, submit a 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 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.

   ![PAY COPAY Screen]

   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]

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

![Enter payment information]

**Address**

1234 CONFLUENCE WAY

**City**

WENATCHEE

**State**

Washington

**ZIP**

98801

**Phone**

5096638711

**Email**

ROCKCLIMBER.COM
6. A verification window will appear. If everything is correct, click **SUBMIT**.

7. 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.
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**.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>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?</td>
<td>itchy ear</td>
</tr>
<tr>
<td>Have you been hospitalized since your last visit?</td>
<td>No</td>
</tr>
</tbody>
</table>