

Confluence Health

MyChart - Patient Quick Start Guide



Teamwork • Trust • Compassion • Respect

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Welcome to MyChart

MyChart provides you with online access to your medical record. It can help you participate in your healthcare and communicate with your providers.

With MyChart, you can:

- View all your health information in one place. See your medications, test results, appointments, medical bills, estimates, and more all in one place, even if you have been seen at multiple healthcare organizations.
- Quickly schedule appointments and find care. Make appointments at your convenience, complete previsit tasks from home, and find the nearest urgent care or emergency room when you need it.
- Connect with a doctor no matter where you are. Send a message, get online diagnosis and treatment, talk face-to-face over video, or arrange to follow up in person, depending on the level of care you need.
- Take care of your children and other family members. Stay on top of everyone's appointments and check in on family members who need extra help, all from your account.

This guide provides an overview of many of MyChart's features and how to use them.

Access MyChart

- On your computer, go to <https://mychart.confluencehealth.org/MyChart>
- On your mobile device, download the MyChart app.

Sign up for a MyChart account

To sign up for MyChart, there are several different methods of MyChart signup that might be used by different departments across the organization:

- Clinic staff might sign you up directly while you are at the front desk or in the exam room.
- You might receive a MyChart activation code on your After Visit Summary.
- You might receive a text or email with an activation code when you come in for a visit.
- You might be able to use self-signup online to create a MyChart account by matching your information against what is on file in your medical record or with third-party identity verification.

Request an activation code if you do not already have one

If you do not have an activation code, you can request one online. To request an activation code online:

1. On the MyChart login screen on the MyChart website or mobile app, click **Sign Up Now**.
2. Click **Sign Up Online**.

3. Click **Match Yourself with Our Records** or **Verify with a Third Party** to supply personal verification items, such as the last four digits of your Social Security number and your date of birth and have an activation code sent to your email address or mobile phone.

Use your activation code to sign up

1. From the MyChart login screen on the MyChart website or MyChart mobile app, select **Sign Up Now**.
2. Enter your activation code and other personal verification items, such as the last four digits of your Social Security number and your date of birth. Select **Next**.
3. On the next page, choose the following:
 - **MyChart username**. Choose something that others would not be likely to guess but is easy for you to remember. It cannot be changed at any time.
 - **Password**. Choose a unique combination of numbers and letters, using both uppercase and lowercase letters. Your password must be different from your MyChart username. Choose a password that you do not use for other websites.
 - **Security question**. Choose a question you can use to verify your identity if you forget your MyChart password. The answer you enter cannot include your MyChart password.
4. On the next screen, choose whether you want to receive a notification message in your personal email when there is new information available in your MyChart account. If you opt to receive email alerts, enter your email address.

Log in to MyChart

1. In your web browser, enter <https://mychart.confluencehealth.org/MyChart> and access the login page.
2. Enter your MyChart username and password, and click **Sign In**.

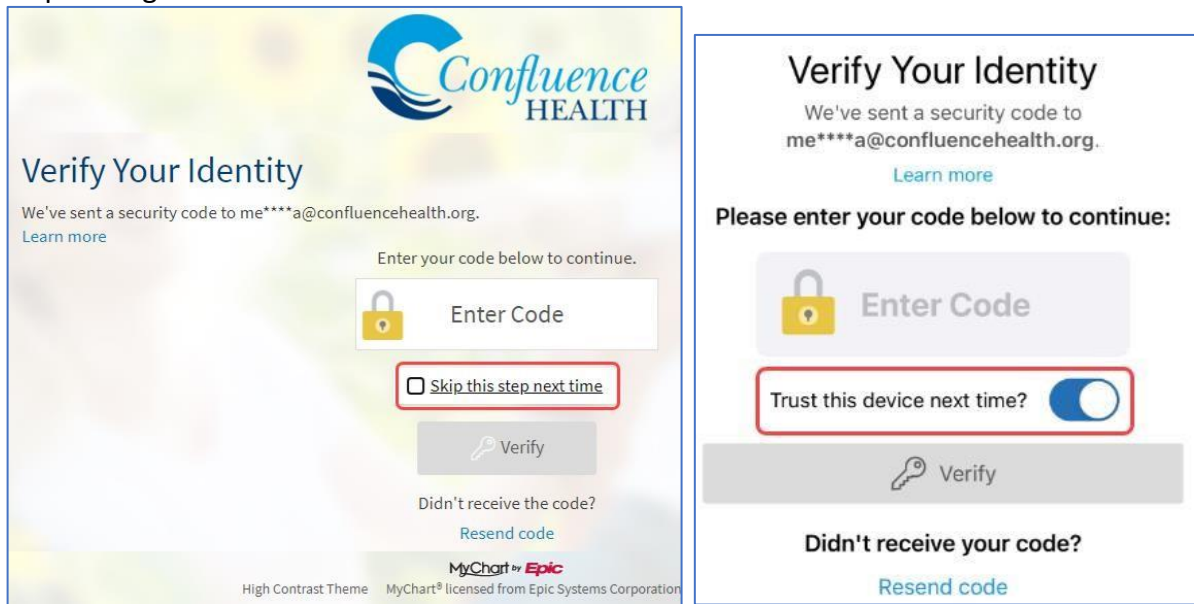
Your account is protected with two-factor authentication

To improve the security of patient's accounts Two Factor Authentication is defaulted on automatically and cannot be turned off. Follow the below steps to complete the two-factor authentication process.

When you log in you will be asked for your email address and password. You will then be asked to Verify Your Identity by entering the security code that was sent to your email address.

1. Open your email to receive the verification code.
2. Open MyChart:
 - A. If you are using a cell phone, open a new window and log into your MyChart account.
 - B. If you are using a computer, click the link to open your MyChart account.
3. The Verification code may take between 5-7 minutes to arrive in your email (make sure to check your email Spam folder).

4. If you have not received the code after 10 minutes, return to the Verify Your Identity window and click **Resend Code**.
5. To bypass two factor authentication for up to 365 days:
 - A. For PC users check **Skip this step next time**.
 - B. For Mobile users slide the **Trust this device next time?** to the on position.
 - I. Hint: If you clear your browser cookie history or log from a different browser, two factor authentication will be required again.
 - II. During signup, password reset, and password expiration, two factor authentication will be required again.



Recover a lost username or password

If you are having trouble logging in, click the **Forgot Username?** or **Forgot Password?** link below the login fields for assistance. Complete the questions on the Recover Your MyChart Username/Password screen to receive an email with your forgotten information. You will be prompted to answer some security questions to verify your identity so you can recover your username or password. If you fail to recover your password after 5 unsuccessful attempts, you will be directed to reset your password. If you have five unsuccessful attempts at resetting your password, your account will be deactivated, and you will need to contact Customer Service.

Learn how to navigate MyChart

When you first log in to MyChart, you will see the MyChart home page.

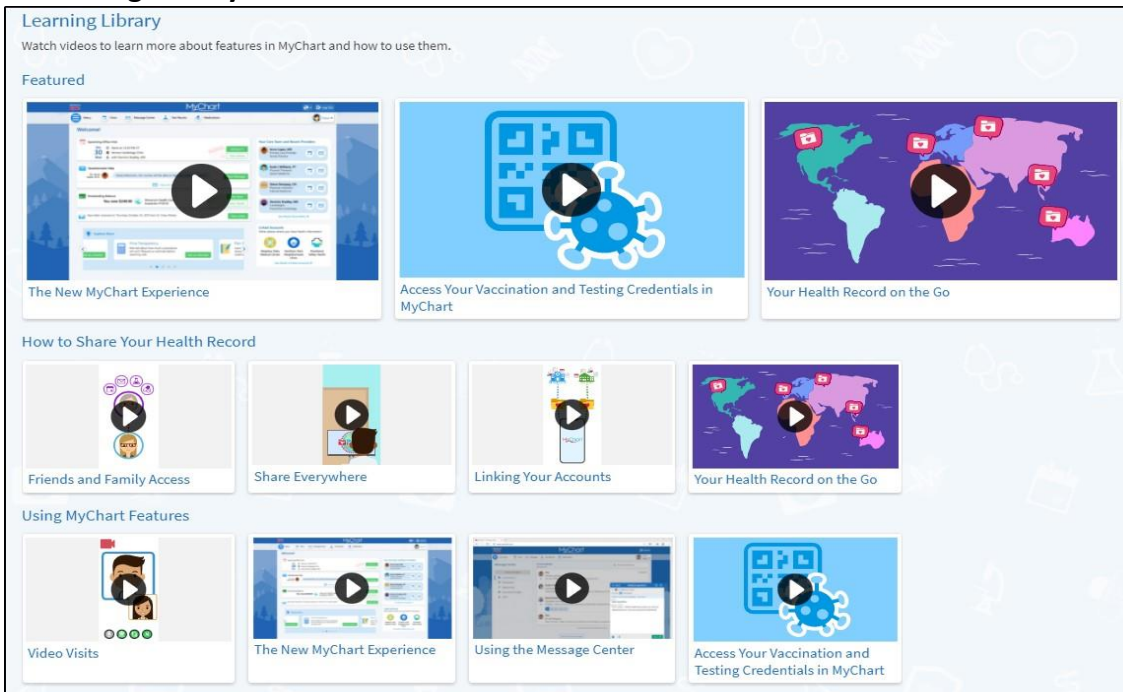
- At the top of the home page are shortcuts you can use to get to the most used activities.

i You can customize the shortcuts by selecting your account in the top right corner and then ★ Change tour shortcuts.

- Below the shortcuts is the health feed, which shows the most important alerts and information for you and any family member you care for, like a new message from your care team and reminders for an upcoming appointment.
- You can use the searchable menu to easily find any other activities you need to get to.

Learn how to use MyChart

In the Learning Library, you can watch videos about MyChart's features. To view these videos, go to **Resources > Learning Library**.



Personal Information



Add demographic information in MyChart so your healthcare provider can provide you with the best care. For example, if you are most comfortable speaking Spanish, this lets them know to have an interpreter available for your visit. Including this information helps providers identify trends in healthcare outcomes based on different demographic groups, which allows them to proactively address and find solutions to healthcare disparities.

Keep in mind that your answers are confidential and are visible only to your healthcare provider and anyone with access to your MyChart account.

1. Under **Account Settings** click on **> Personal Information**.
2. In the **Details About Me** section, click **Edit**.
3. Select your race, ethnicity, and language from the lists of options.
4. Click **Save changes**.

Health

View your test results



With MyChart, you can view test results as soon as they become available, rather than waiting for a phone call or letter from your physician. To view test results, from  Menu go to **My Record** >  **Test Results**. Select a test to see more information about it, such as:

- The standard range for the result
- Any additional comments your provider entered about the result





If you are looking for a specific result, enter key words in the search field on the Test Results page.

Receive email or text messages when new results are available



1. From the  Menu, go to **Account Settings** >  **Communication Preferences**.
2. Expand the Health section and select a notification option next to Test Result.
3. Update your email address and mobile phone number if needed at the bottom of the page.
4. Click **Save changes**.

Manage your medications


View your current medications

From the  Menu, go to **My Record** >  **Medications** to see all your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the physician who prescribed the medication. You can view additional information about a medication, such as precautions to consider when taking the medication and potential side effects, by clicking the **Learn more** link.



- Remove a medication you are no longer taking by clicking  **Remove** and then adding comments about why you are no longer taking that medication.
- Add a new medication by clicking  **Report a Medication** and then adding comments about why you are taking the new medication.
- Your chart will be updated after your healthcare provider reviews the change with you at your next visit.

Request a medication refill

1. From the medication list, click  **Request Refills**.
2. Select the check box next to the medication you need refilled and enter any comments. Click **Next**.

3. Select a delivery method, pharmacy, and pickup date and time that is convenient for you, if applicable. Click **Next**.
4. Review the details of your refill request and click **Submit**.

You will receive a message in your MyChart Inbox when your prescription refill is processed.



You can request refills only for prescriptions that were filled at a pharmacy within your healthcare organization. If you need a medication refill for a prescription at an external pharmacy (for example, Walgreens or CVS), you will have to contact that pharmacy to request a refill.

View a summary of your health information

To get a summary of your medical record, from the  **Menu** go to **My Record** >  **Health Summary**. This summary includes:

- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care

Track your COVID-19 testing and vaccination status

The COVID-19 activity pulls together helpful information and resources for you, including:





- Your COVID-19 testing status and recent results.
- Your COVID-19 vaccination status and details about the vaccine you received.
- Links to educational resources provided by the Centers for Disease Control and Prevention (CDC).

Click  to quickly access the activity from the MyChart home page. You can also access the activity from the COVID-19 health feed card or by going to **My Record** >  **COVID-19**.

Respond to questionnaires from your clinic

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

You might be able to respond to questionnaires in three different places:

- Open available questionnaires from the  **Menu**, go to **My Record** >  **Questionnaires**.
- If your doctor wants you to complete a questionnaire for an upcoming appointment, from the  **Menu** go to **My Record** >  **Visits**. Locate the upcoming appointment and click **Details**. Open the questionnaire by clicking its name in the Questionnaires section of the appointment details.



- If your doctor sends you a MyChart message with an attached questionnaire, open it by clicking the questionnaire link near the top of the message.

If you need to close a questionnaire before you finish it, click **Finish Later** to save your progress.

Track your daily health readings online

Your physician might request that you record information such as your daily glucose or blood pressure readings in MyChart. When you enter the information in the Track My Health feature, your physician automatically receives the readings so he can monitor your progress between visits.

Record a new reading in Track My Health

1. If your provider has assigned a flowsheet, you can enter your reading in the  Track My Health feature.
2. Go to the  Menu, go to **Communication > Messages**. Open the message from your physician about a new flowsheet. The flowsheet is what you use to enter your readings in the Track My Health feature.
3. Click the flowsheet's name to open it, and then click **Add New Data** to start recording your readings.
4. Enter your reading with the date and time and click **Continue**.
5. Verify that you have entered your reading correctly and click **Submit**.
6. If you need to change or remove a reading after you have submitted it, you can do so by clicking **edit** or **delete**.



If you have a fitness tracking device, such as a Fitbit or a Withing's smart scale, you can link your device to MyChart to automatically fill in your flowsheet with relevant data. Click **Connect My Account** on the Track My Health page to get started.



Track your readings over time in a table or graph

1. On the Track My Health page, click a flowsheet's name to view previous readings in a table.
2. From this page, you can:
 - Change the orientation of the table. Click the **More Options** link to choose whether dates appear as rows or columns.
 - View the readings in a graph. Click **Graph** to change the display.
 - Customize the date range or the number of readings that appear. Change the **From** and **to** fields or the **latest values** field and click **Apply** to update the display.

Advance Care Planning



Planning for care later in life can be difficult for you and your loved ones. Accessing our Advance Care Planning page allows you to set health care agents and add any relevant documents. There are also many different sources of information to help you set up a plan, including how to reach out to trained staff for hands on help.

Adding a Planning document

1. From the  Menu, click on **Advance Care Planning**.
2. Click  **Add a document**.
3. Select the document you would like to add.


Messaging




View messages from your clinic

You can read any messages sent by your doctor or other clinic staff by going to your Message Center ( **Menu** > **Communication** >  **Messages**). The Message Center includes four folders:

- The **Conversations** folder is the primary folder and includes messages between you and your care team or other clinic staff. The list of messages in this folder is organized by conversation to keep messages and replies together.





To flag a conversation for easy access in the future, open the conversation and bookmark it. The conversation then appears in the  **Bookmarked** folder.

- The  **Appointment** folder includes appointment reminders and confirmations.
- The  **Automated Messages** folder includes system messages automatically sent to and from your account, like payment confirmations and questionnaire submissions.
- The  **Trash** folder includes any conversations you have deleted from your main folders. If you realize you need a message again, you can restore it to its original folder.



If you are looking for messages about a specific topic in a particular folder, you can enter key words in the **Search conversation** field to find them.


Receive email or text messages when new MyChart messages are available


1. From the  **Menu**, go to **Account Settings** >  **Communication Preferences**.
2. Expand the Messages section and select a notification option.
3. Update your email address and mobile phone number if needed at the bottom of the page.
4. Click **Save changes**.

Ask your doctor for medical advice


If you have a non-urgent medical question, you can send a message to care team. This message is secure, meaning your information stays private as it is sent over the Internet.


You might send a message if you are not sure whether you should come in for an appointment, if you need clarification on the dosage of one of your medications or something that was discussed in a recent visit, or if you just want advice about a common illness.

1. Go to  **Messages**.
2. Click **Send a message**.

3. Select  **Ask a medical question.**
4. Choose the applicable type of medical question.
5. Select a recipient from the list. This list might include your primary care provider, another doctor with whom you have recently had an office visit, or the general nursing staff at the clinic.
6. Select a subject for your message and enter your question. A. All messages are saved as a draft.
7. When you are finished, click **Send**.

If you have opted to receive notification for new messages in your MyChart account, you will receive a message or push notification letting you know that the clinic has responded to your request.







To view a message after you have sent it, go to **Communication** >  **Messages** and find your message in the **Conversations** folder.

Attach Images/Video to MyChart Messages



Patients can attach images/videos to the Medical Advice Request messages that they send to their clinician. Some things to keep in mind:

Any images/videos attached to the message become a permanent part of your medical record.	Messages can only be sent to providers that you have seen before.
You can attach up to 3 files	Allowed file types are: BMP, JPEG, JPG, PDF, PNG, TIF, TIFF Allowed file size is 10240 KB for images and PDFs Allowed Video Attachment Extensions are: MOV, AVI,6, MPG, MP4, WMV, 3GP. Video Attachment max size is 65536

1. Go to **Messages**, click on **Send a message**.
2. Select  **Ask a medical question.**
3. Click on **Non-Urgent Medical Question**.
4. After reviewing the guide, click **Next**.
5. Select **Non-Urgent Medical Question**.
6. Select the provider to send the question and image to.
7. Fill out the message window:
 - A. Subject:
 - B. Message:
 - C. Click .
7. Use the Choose File to Upload window to locate the image/video on your device. Once selected, click **Open/Send**, depending on if you are using a desktop computer or a mobile device.

8. The image/video title will populate below the message. A. You can also delete the image by clicking the .
9. Click **Send** .

Request a referral to see another provider

1. Go to  **Messages**.
2. Click on **Send a message**.
3. Select  **Ask a medical question**.
4. Click on **Referral Request**.
5. Choose the provider you want to send the request to, a reason for the referral, and a brief message explaining your request.
6. When you are finished, click **Send**.

Someone at your clinic should respond to you within two business days. If you have opted to receive email or text notification for new messages in your MyChart account, you will receive a message letting you know that the clinic has responded to your request.



To view a message after you have sent it, go to **Communication** >  **Messages** and find your message in the **Conversations** folder.

Visits

View your past or upcoming appointments



You can view your past or future appointments by going to the  **Appointments and Visits** page.

Select a scheduled future appointment or click **Details** to see info such as:



- The date, time, and location of the visit
- Any pre-visit instructions from the clinic • Directions to your clinic

If an upcoming appointment is eligible for eCheck-in, you can use it to take care of tasks such as the following before you arrive at the clinic:

- Pay visit copays
- Pay pre-payments and balance payments
- Verify or update insurance and demographics information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires
- Verify guarantor information

For past appointments, you can click  **View Details**[®] to see a summary of the care you received during your visit. You can also view any of your doctor's visit notes that are shared with you by clicking  **View notes**.

Schedule or request an appointment

To schedule or request an appointment, from the  **Menu**, go to **Find Care** >  **Schedule an Appointment**. Depending on the reason for scheduling or type of appointment you choose, you will be directed to the Schedule an Appointment or Request an Appointment page.

- When you schedule an appointment, you make the appointment yourself and do not need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can choose a location and enter preferred dates and times. Pick an appointment from the list of available time slots to schedule it.
- When you send an appointment request, you are asked to enter the provider you want to see, the reason for the visit, preferred dates and times, and any comments regarding why you are requesting the appointment. After you submit your request, someone from the clinic will contact you to verify an appointment date and time. Until the clinic verifies the appointment, the pending appointment request appears under **Requested Appointments** on the **Appointments and Visits** page.



If you do not find the appointment date or time you want when you schedule an appointment, you can add yourself to the wait list to receive notification if earlier appointment times become available. Wait list options are available during scheduling and after you have scheduled when you click **Details** for an upcoming appointment from the Visits list.

You can also favorite an appointment to make it easy to schedule the same type of visit again later with the same provider and department.

Cancel an appointment

Depending on the date and time of your next appointment, you can cancel it through MyChart.

1. Go to **My Record** > **Visits** and select the appointment from the list or click **Details**.
2. Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.

Enter your symptoms to determine the best next steps

Determine the right level of care for your symptoms with limited intervention from a doctor or nurse. By answering questions in Symptom Checker, you can avoid or reduce in-person visits to your healthcare provider.

1. From the **Menu**, go to **Find Care** > **Symptom Checker**.
 - A. You can also search for – self triage – from the **Menu**.
2. Select the symptom you have.
 - A. **Call 911 if you have an emergency or urgent medical question.**
3. Review the Symptom Checker Terms and Conditions.
 - A. You must accept the Terms and Conditions before continuing with Symptom Checker.
4. Click **Accept**.
5. Based on your symptoms, answer the questions that appear.
6. Depending on your answers, you will see one or more of the following options for next steps:
 - A. Schedule a DirectCare visit (in-person)
 - B. Schedule a New Patient visit (in-person)
 - C. Schedule an in-person visit with your PCP
 - D. On-Demand Virtual Visit
 - E. Instructions:
 - i. Home Care
 - ii. For serious symptoms, contact 911 or see medical care at the nearest Emergency Department.
7. To review this advice later, select Symptom Checker from the Menu and click the **Symptom Checker History** link.

Have a video visit with your doctor

Meeting with a provider by video visit is a convenient way to receive care without coming to the hospital or clinic in person.

You can use a web browser on your desktop computer or a mobile application to start a video visit. Mobile devices are preferred because most already have the appropriate camera and microphone setup for video visits.



If your provider is on a mobile device, they cannot access other activities while they are connected to the video because mobile devices will not run the camera in the background. If a provider navigates to a different activity, for example to document information about your visit, the video visit is paused, and you see the provider's initials in a circle instead of a video image until the provider returns to the video visit activity.

Prepare for your video visit

To ensure a smooth connection, complete the following tasks well in advance of your video visit:

- If you will join the video visit on your mobile device, make sure the camera app is up-to-date.
- If you will join the video visit on your desktop computer:
 - Make sure you have a webcam set up. This can be a webcam that's part of a laptop or a separate USB webcam.
 - Make sure you have installed any required browser plug-ins, software, or apps with the most recent updates.




After you have done these things, you can test that everything is working in MyChart. You should complete this test at least 30 minutes prior to your video visit start time.

Medical Record Access and Sharing




Epic offers several unique features through the MyChart patient portal to allow you to access your health records and share them with other people. For more information about giving or getting access to a family member, legal guardian or care takers' records, refer to the [Proxy Access](#) section below.

View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.



1. From the  **Menu**, go to **Sharing** >  **Sharing Hub** and select  **Download health and visit summary**.
2. Select a visit on the **Single Visit** tab or use the **Date Range** tab or **All Visits** tab to select multiple visits. Then:
 - Click **View** to view a copy of the visit summary.
 - Click **Download** to save a copy of the visit summary for your records.
 - Click **Send** to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.

If you need to provide healthcare information to another organization, like your insurance or workplace, you can download a formal copy of your health record that will have your organization's letterhead on it.

1. From the  **Menu**, go to **Sharing** >  **Sharing Hub** and select  **Request formal copy of health record**
2. Select where you want the record sent and enter the contact information of the person or organization who will receive the record.
3. Select the purpose of the record request.
4. Use the **Date Range** tab or **All Visits** options to select how much information you want to share.
5. If your organization has multiple clinics, select how many of them you want information from.
6. Choose what types of information you want included in the record.

Download medical records you have requested

If you have requested a copy of your medical record from your healthcare organization, you can download and view it from MyChart, rather than having to wait for a paper copy to arrive in the mail.



1. From the  **Menu**, go to **My Record** >  **Download My Record** and click **Requested Records**.
2. Locate the record you want to view and click **Download**.
3. If the record is password protected, you see a message to warn you. Click **Continue Download**.

4. Click **Save** to save the file to your computer and then open it or click **Open** to open it without saving it to your computer.
5. If the record is password protected, click **Show Password** on the Requested Records page to view the password you need to access the document and enter it to view the document.

Share your medical information with other healthcare professionals

Share Everywhere is a way for you to grant one-time, limited access to the health information you can see in MyChart with the people who are taking care of you.


Using your MyChart or MyChart mobile account, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a clinical note back to your health system to help keep your care team informed of the care they provided.


1. From the  **Menu**, go to **Sharing** >  **Share Everywhere**.
2. Enter the name of the person who will be viewing your record and **Request share code**.
3. Tell that person to go to www.shareeverywhere.com to enter the code along with your date of birth.

See your medical information from other healthcare organizations

If you have been seen at another healthcare organization, you might be able to view information from that medical record right in MyChart. You might have heard this feature referred to as Happy Together. The information you might see from other organizations includes:

- Allergies
- Care Team
- Health issues
- Medications
- Messages
- Test results
- Visits

To view this information, you must link your account. Go to **Sharing** >  **Link My Accounts** to get started. Then, select your account from the list or search for it and click **Link Account**.

After you have linked your accounts, information from the other organization appears in MyChart with an  icon.



For more information about how linked accounts work and what information you can see from each healthcare organization, click the **See our FAQ page** link.





Proxy Access

MyChart Proxy Access enables a parent, legal guardian or other caregiver to access a patient’s medical record. Adults may also grant access to another adult. Different types of Proxy Access are available depending on the patient’s age and circumstances.

If you are a Proxy and have access to your family member or other adults' medical records, you can view most of the information in their records in the same way that you view your own.

Full Proxy Access Includes...


- Message their Care Team
- Request, schedule and cancel appointments
- eCheck-In for appointments, complete questionnaires, and e-sign documents
- Join Video Visits
- Growth charts
- Test results
- Medications
- Past visits and After Visit Summaries
- Provider notes
- Health issues
- Medical, surgical, and social history
- Documents and scans
- Visit summary documents
- View the following:
 - Allergies
 - Immunizations
 - Preventative care reminders
 - Referrals
- View and update the following:
 - Insurance information
 - Contact information



Types of MyChart Proxy Access	
Children aged 0-12	Parents and legal guardians with Proxy Access to children ages 0-12 will have <i>full</i> access to the child's medical record.
	This will automatically transition to <i>limited</i> Proxy Access when the child turns 13 years old.
Teens aged 13-17	If a child is 13 or older, parents and legal guardians with Proxy Access will have <i>limited</i> access unless the teen chooses to grant <i>full</i> Proxy Access through their own MyChart via the  Sharing Hub or the  Get/Give Access (Proxy) menu options.
	Proxy Access will be automatically terminated when the teen turns 18 years old.
	For teen patients with severe cognitive impairment, please discuss the possibility of <i>full</i> Proxy Access with your Primary Care provider at a clinic visit.
Adults	Adult patients may invite another adult, such as a spouse or caretaker, to have full Proxy Access through MyChart via the  Sharing Hub or the  Get/Give Access (Proxy) menu options.
	For adults with limited capacity to manage their own healthcare, Proxy Access may be granted to another adult that has legal documentation that stipulates legal guardianship of the patient.

Parents and legal guardians with Proxy Access to children ages 0-12 will have *full* Proxy Access to the child's medical record. This will automatically transition to *limited* Proxy Access when the child turns 13 and remain in effect until age 17. If child is 13 or older, the teen can choose to grant/give full Proxy access to a parent or legal guardian.

Limited Proxy Access to Teen Patients	
Includes...	Excludes...
<ul style="list-style-type: none"> • Message your teen's Care Team • Request, schedule and cancel appointments • eCheck-In for appointments, complete questionnaires, and e-sign documents • Join Video Visits • Growth charts • View the following: <ul style="list-style-type: none"> ○ Allergies ○ Immunizations ○ Preventative care reminders ○ Referrals • View and update the following: <ul style="list-style-type: none"> ○ Insurance information ○ Contact information 	<ul style="list-style-type: none"> • Test results • Medications • Past visits and After Visit Summaries • Provider notes • Health issues • Medical, surgical, and social history • Documents and scans • Visit summary documents

I want to request/get access to someone else's record

If you are a parent, legal guardian, family member or caretaker and need to request full access to someone else's record via the  Give/Get Access (Proxy) activity.


1. Go to the  **Your Menu** > **Sharing** >  **Give/Get Access (Proxy)**.
2. Click or tap the **I want to request access to another patient's record** hyperlink.
3. Select the appropriate Proxy form based on the patient's age that you are requesting access to and your preferred language, i.e., Child Proxy (English) or Child Proxy (Spanish).
4. Fill out the form and click or tap **Submit**.






Once your request has been received by Confluence Health Medical Records staff, they will review and approve or deny the request.


Please allow one week for the request to be reviewed.

I want to invite/give someone else access to my record

If you are age 13 or older, you can invite a family member, close friend or caretaker access to your records via the  Sharing Hub activity.

1. Go to the  **Your Menu** > **Sharing** >  **Sharing Hub**.
2. On the Friends and Family Access page, click  **Invite Someone** under the Who Can See My Record? section.



This can also be done by going to **Sharing** >  **Give/Get Access (Proxy)** > and selecting the **I want to give someone access to my record** hyperlink. This link will redirect you to the Friends and Family Access page where you can follow the steps below.

3. Enter that person's name and email address, confirm the level of access, and click **Send Invite**. The invitation then appears as Pending at the top of the page.
 - After you send the invitation, the recipient receives an email to notify them that you have invited them to have access to your account. From this email, they can click a link that takes them to a page where they must enter your date of birth to confirm that they know you and accept the invitation.
4. After the person you have invited accepts the invitation, you will receive a tickler message to let you know, and the Pending label is removed next to that person's name on the Friends and Family Access page. You can return to this page at any time to edit or revoke that person's access.

Accessing a family member's record


This section explains how to access a family member's record and how to access growth charts and immunizations in a child's record.


After you have received permission, new or timely information for your family member will appear alongside your info in your health feed on the MyChart home page. You can view other information in your family member's record by switching to their chart. From the **Switch** menu, select your family member's name.





You can customize how the names and photos appear for each family member. For more information, refer to [Personalize MyChart](#).

View and print your child's immunization record

When you are in your child's record in MyChart, from the  **Menu**, go to **My Record > Health Summary** and select the immunizations tab. You can see the immunizations your child has received and the dates on which she received them. Click the immunization name to learn more.

To open a printer-friendly summary of your child's immunizations, click .


View your child's growth charts

To view your child's growth charts, open your child's record from the  **Menu**, go to **My Record >  Growth Charts**.

You can customize the view of the growth chart by:

- Choosing a different Chart Set. For example, you can switch between growth charts provided by the Center for Disease Control (CDC) and the World Health Organization (WHO).
- Changing the Chart Type. For example, you can switch the view from length-for-age to weight-for-age or Body Mass Index-for-age.

You can also view the growth chart with a different unit of measure (metric or standard) by selecting the option for that unit of measure.

If you want a copy of the growth chart for your records, click .

Billing and Insurance


View your outstanding balance

To see the outstanding account balance for any of your accounts, go to **Billing > Billing Summary**. To view additional information about an account, including past statements, click the **View account** link.



If you have a question about your balance or other information for a billing account, you can use the **Contact customer service** link to send a message.

Make a payment for an outstanding account balance

1. From the  Menu, go to **Billing > Billing Summary**.
2. Click **Pay Now** for the account on which you want to make a payment.
3. Enter the amount to pay along with your credit card or bank account information. Click **Continue**.
4. Review your payment information and click **Submit Payment**.



If you cannot pay your entire balance all at once, you can set up a payment plan to pay a smaller amount each month.

Make a single payment across multiple guarantor accounts




Patients can pay toward all eligible guarantor accounts all at once, instead of having to make multiple individual payments. Patients can simply select which guarantor accounts they would like to make a payment on and how much they will be paying.

Sign up for paperless billing



1. From the Billing Summary page, click the paperless billing alert.
2. If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number and select the corresponding check box to receive notifications.
3. Select the **I understand that I will no longer receive statements in the mail** check box and click **Sign Me Up**.

Get a price estimate for medical care

To help you plan for upcoming care, such as a surgery or other procedure, you can get an estimate from MyChart. The estimate is based on your insurance and what other patients have been charged in the past.

1. From the  **Menu**, go to **Billing** >  **Estimates** and click  **Create a New Estimate**.
2. Select where you want to have the procedure done and look up the kind of service you want to receive. You can search for the service or look through services by category.
3. After you select the service and see the estimate, you can click **Save** so that you can refer to it later.



Request assistance with your medical bills

If you need help paying your medical bills, you can submit a financial assistance application to see if any resources are available to you. From the  **Menu**, go to **Billing** >  **Financial Assistance** to get started. You will need to provide the following information to complete the application:

- How many people live in your household?
- How much you receive from all sources of income
- Your household expenses (such as mortgage, rent, and auto loan)
- Your assets (such as your bank account and vehicle)
- Supporting documents to verify the information you provide




After you submit your application, a financial counselor will contact you to follow up.

View claims for services covered by insurance

1. From the  **Menu**, go to **Insurance** >  **Claims**.
2. Select a claim to view details for it, such as the servicing provider and claim status.

If you have a question regarding the claim, click **Customer Service Request** to send a message to customer service staff.

Review and update your insurance information


To review the insurance information your clinic has on file, from the  **Menu**, go to **Insurance** >  **Insurance Summary**. Click  **View coverage details** for the payer or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.

To update your insurance information, make any of the following changes:

- Request a change to an existing coverage.
- Remove a coverage.

- Add a new coverage. New coverages are submitted for verification when you log out of MyChart.

Updating your insurance card pictures



To update the pictures of your insurance card on file, from the  **Menu**, go to **Insurance Summary**, then click **Replace insurance card photos**.



Preferences and Administrative Features

Personalize MyChart

There are three ways you can personalize how MyChart appears for you and each of your family members. For each account you have access to, you can:




Specify the color scheme.	Change the name that appears under that person's photo.	Photos you are visible to medical staff, only use a photo that shows each person's face.
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1. From the  **Menu**, go to **Account Settings** >  **Personalize**.
2. Click **Edit**.
3. Make any of the changes described above and then click **Save**.

 You can also add your photo from the **Switch** menu by selecting  **Add your photo**.

Update your personal information



You can update your address, phone number, email address, and other personal details at any time so that your clinic always has the most up-to-date information in your record.

1. From the  **Menu**, go to **Account Settings** >  **Personal Information**.
2. Click  **Edit** in the section for the information you need to update.
3. Confirm that your updated information is correct, and then click **Save Changes**.


Customize your care team

There may be a time that you change providers and want that provider removed/hidden from showing on your care team list.

Hide Provider:



1. From the home screen in MyChart select the provider you want hidden from the  Care Team and Recent Providers area.
2. Select  **Hide provider**.

Unhide Provider:

1. Click on the **Show hidden providers**.
2. Select the provider you are wanting to show on the patient's care team and click on  **Unhide Provider**.




Customize your notification preferences

MyChart can send you notification by email or text message when there is new information available in your MyChart account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

1. From the  **Menu**, go to **Account Settings** >  **Communication Preferences**. A. This is for both computer and mobile devices.
2. Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive and click **Save Changes**.
3. Update your email address and mobile phone number if needed.

Signing up for appointment reminders




Confluences uses Hello World to send out appointment reminders. Follow the steps below to activate appointment reminders.

1. From the  **Menu**, go to **Account Settings** >  **Communication Preferences**.
2. Under Text message, select **Subscribe**.
3. Select **Appointments**.
4. Select **Advanced settings**  .
5. Under Appointment confirmation, toggle Text message on.
6. Select **Save changes**.





You can sign up for text message alerts by sending start to 29102. This will opt you in to text messaging alerts. You can further set what type of reminders you would like to get by going to communication preferences.

Signing up for Balance Updates



1. From the  **Menu**, go to **Account Settings** >  **Communication Preferences**.
2. Under Text message, select **Subscribe**.
3. Select **Billing**.
4. Select **Advanced settings**  .
5. Under Balance Updates, toggle Text message on.
6. Select **Save changes**.

Deactivate your account!

If you deactivate your MyChart account, you are automatically logged out and cannot log back in. No medical information and associated data is deleted, and if any proxies have access to your chart, they continue to have access. If you change your mind, you can contact your clinic or help desk to reactivate your account.

- On the website, from the  **Menu**, go to **Account Settings** >  **Security Settings** and click the link under Deactivate Your Account. Then, click **Deactivate** on the Deactivate Your Account page.
- On the mobile app, go to the **Account Settings** and click **Deactivate Your Account**. Then, click **Deactivate** on the Deactivate Your Account page.

Change your MyChart password

To ensure that your medical information stays protected, consider changing your MyChart password periodically. To do so, from the  **Menu**, go to **Account Settings** >  **Security Settings**.

Mobile Apps

MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the MyChart website, allowing you to do all the following, and more!

- View test results
- Send and receive messages
- Schedule and confirm upcoming appointments and view visit summaries for past appointments
- View your health summary, including allergies, immunizations, current health issues, and medications
- View preventive care procedures and when they are due
- Request and pay for medication refills
- View billing statements and pay balances due and visit copays
- Access family members' charts

If you have an iOS device, you can pair it with Apple Watch™. With MyChart for Apple Watch, you can:


- See alerts for new information in MyChart
- View upcoming appointments
- Read messages
- Review your medication list

Download the MyChart app

To install the MyChart app, go to the App Store or Google Play Store and search for "MyChart."

1. On your mobile device, open the Apple App Store (if you have an iOS device) or the Google Play Store (if you have an Android device). Look for one of the following icons to find the app store on your device:



2. Search for **MyChart**. Look for the following logo to make sure you have the right app: 
3. Tap **Install**.
4. After you have installed the app, tap **Open** or find the MyChart icon on your device and tap to open it.
5. Select your primary healthcare organization from the list of organizations. If you do not see it right away, you can search for your healthcare organization by name, state, or ZIP code.



You can easily add or switch between your MyChart accounts at different healthcare organizations using the **Switch Organizations** button on the login screen or the **Switch Organization** menu option after you have logged in.

