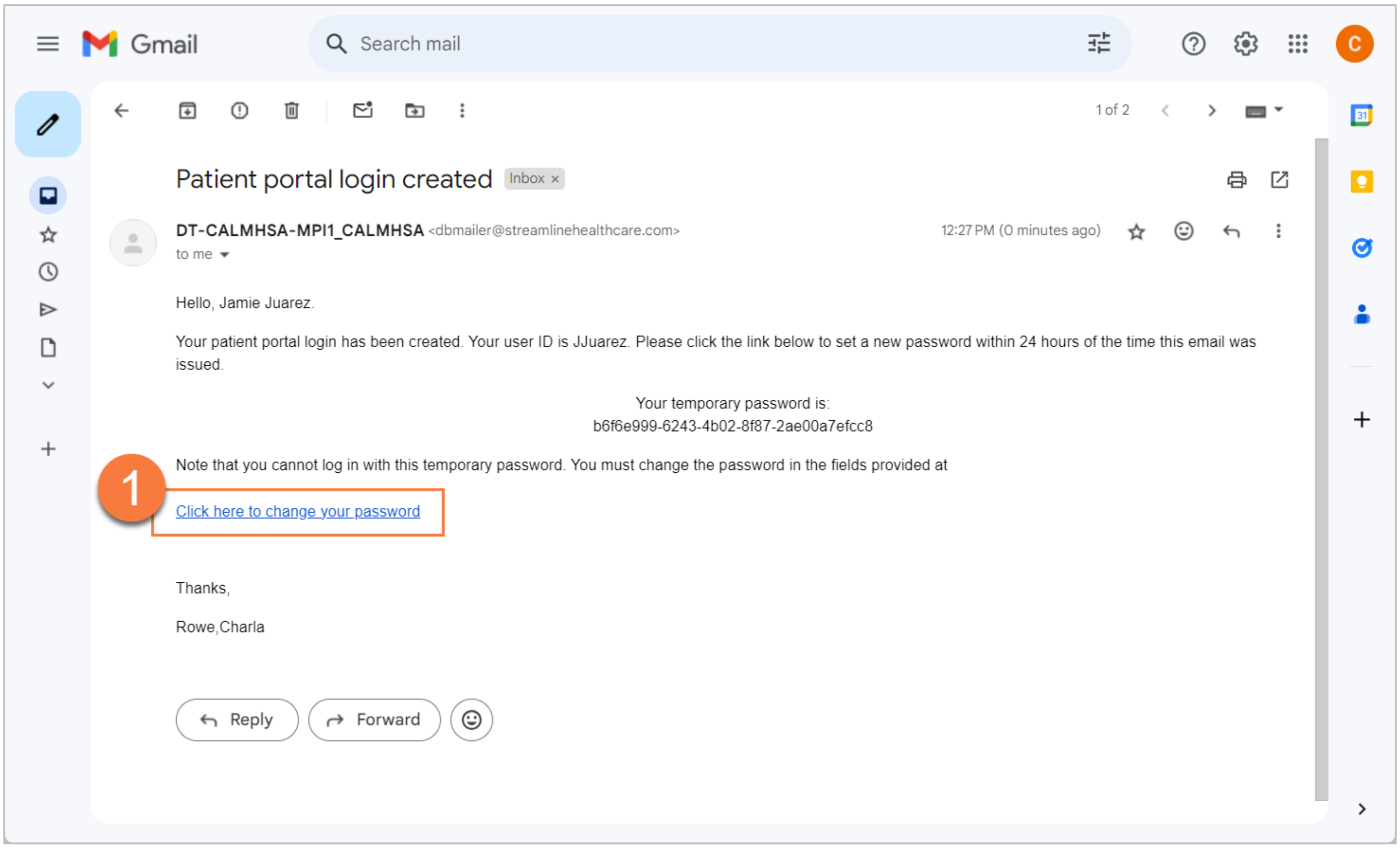
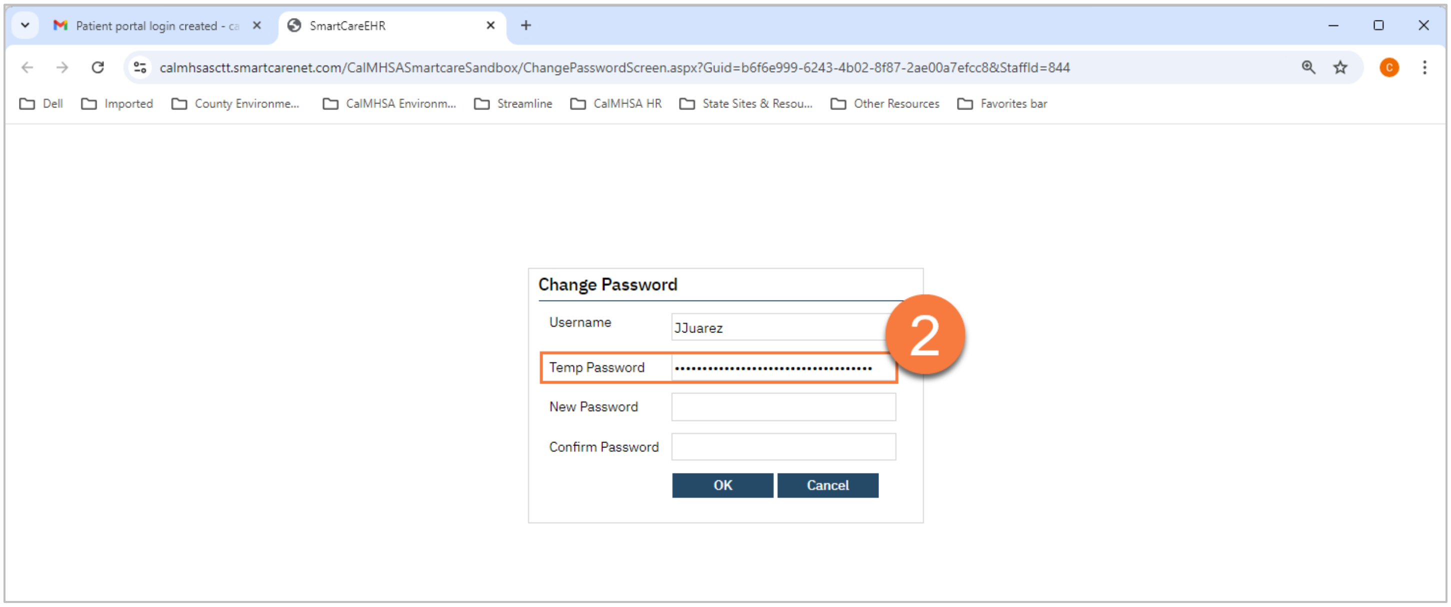
What Happens When You Get a Patient Portal Account

When you decide to get a patient portal account, you can expect the following:

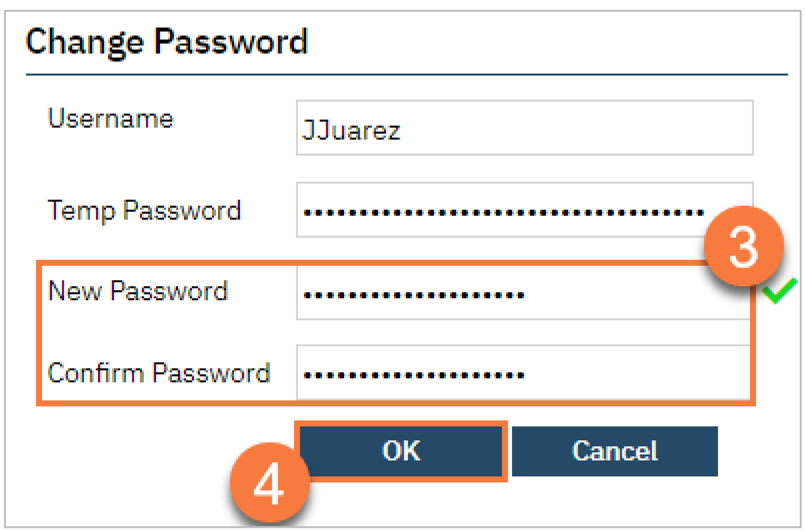
1. You will receive an email to the email address on file. You will be automatically given a temporary password and will be asked to change your password. **Click the link** to do so.



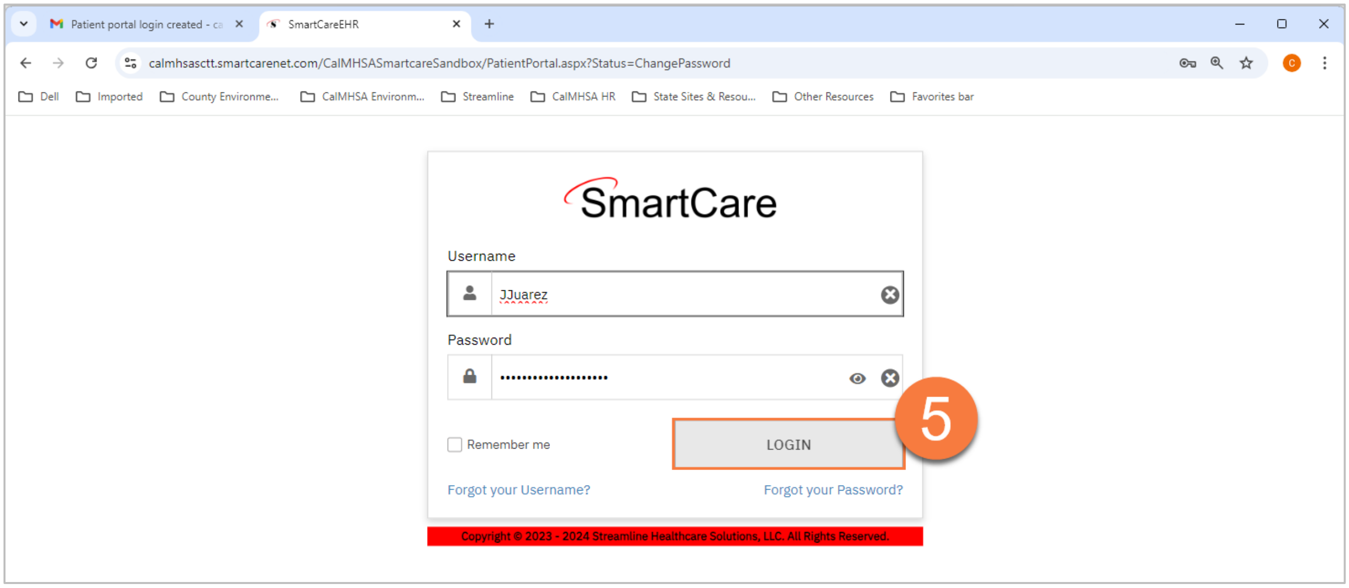
2. This takes you to a “Change Password” page. The temporary password will already be entered in the “Temp Password” field, so you don’t need to re-enter it.



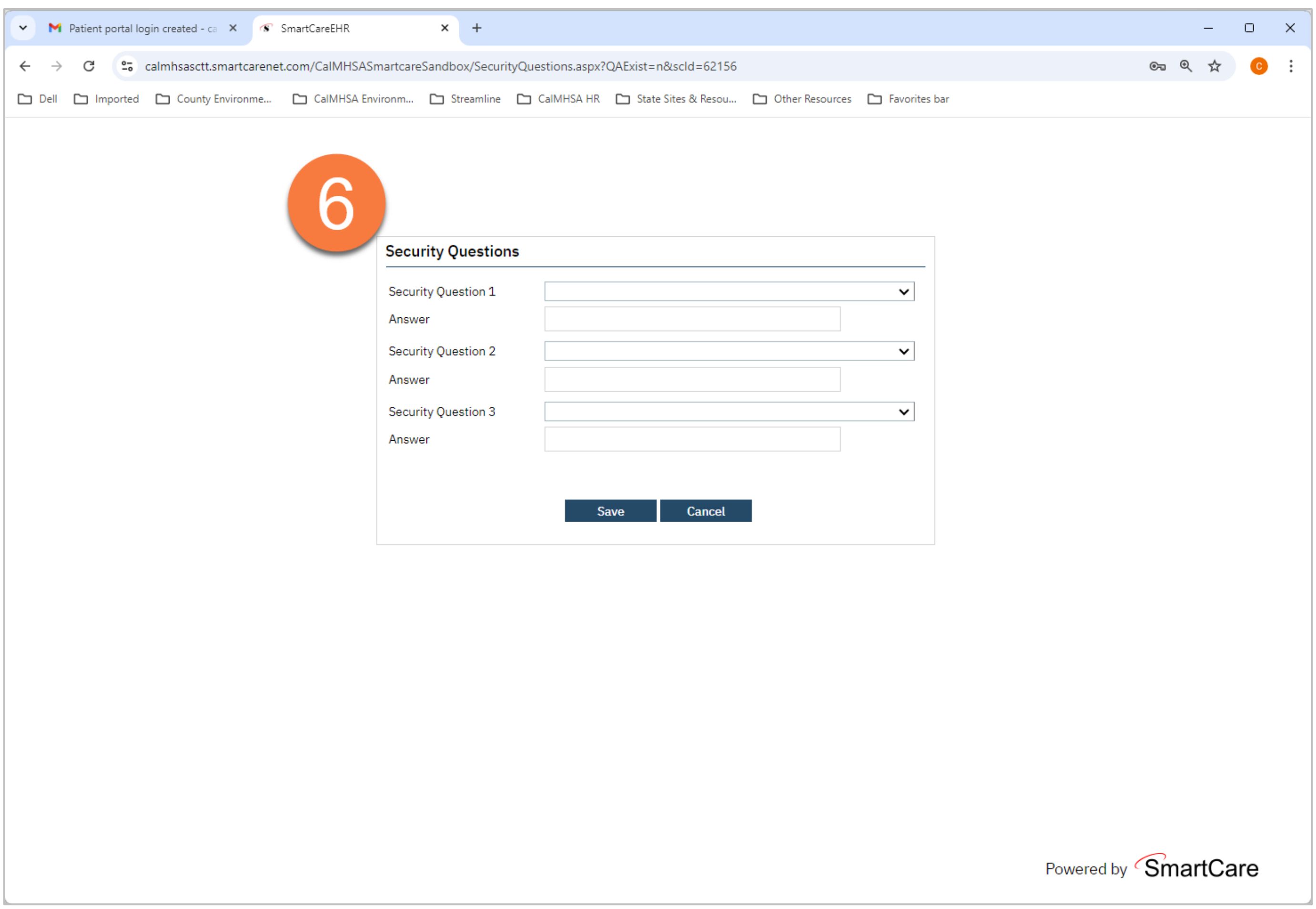
3. **Create a new password** by typing it in the “New Password” field. Then type it again in the “Confirm Password” field.
4. **Click OK**.



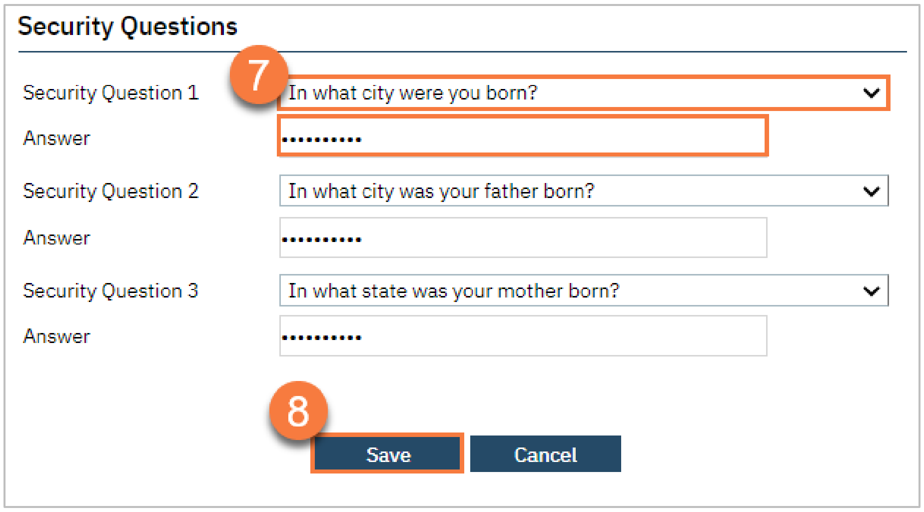
5. This will take you to a login screen. Your username and your new password will be entered automatically, so you don’t have to enter them again. **Click Login** to log in to the Patient Portal. We recommend that you bookmark this page and take note of your username.



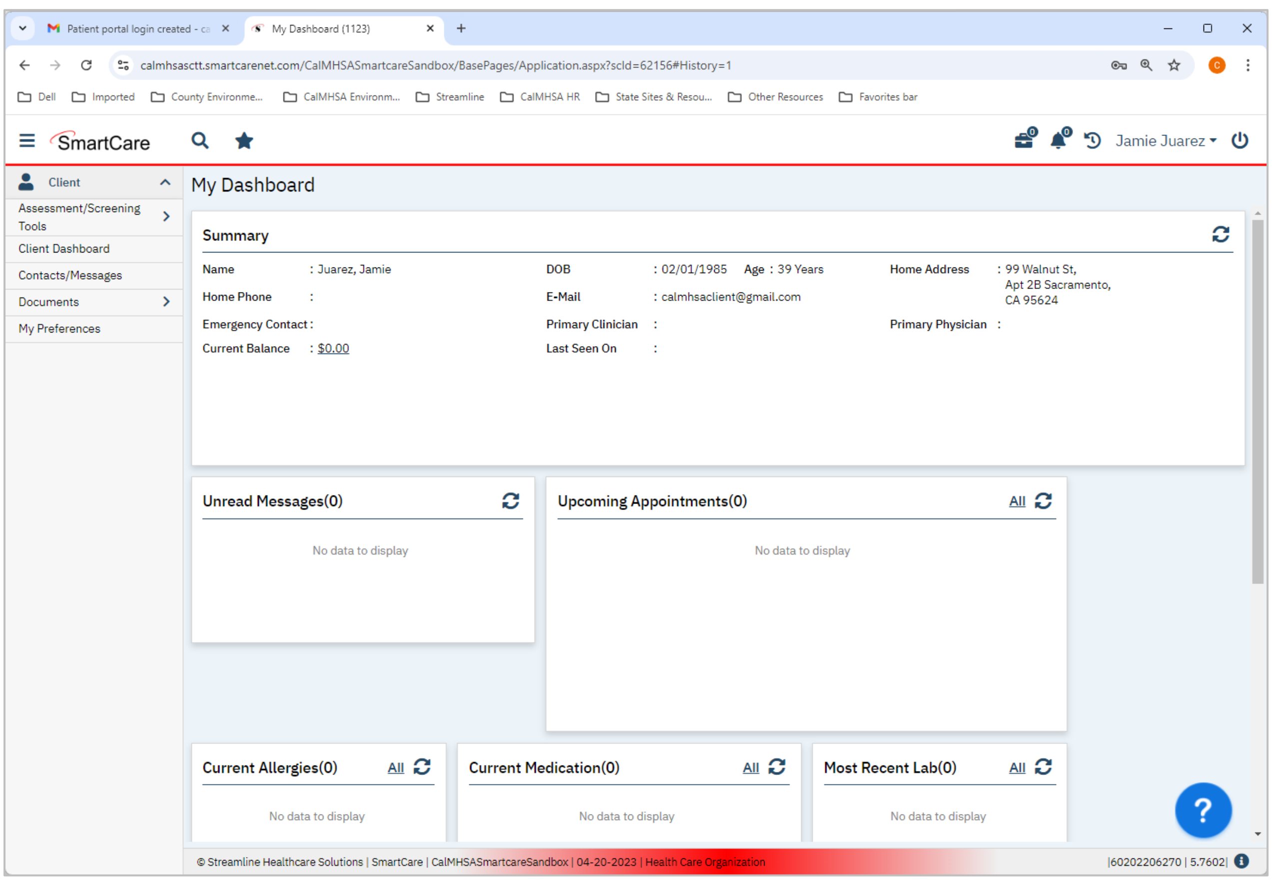
6. This will take you to the Security Questions setup screen.



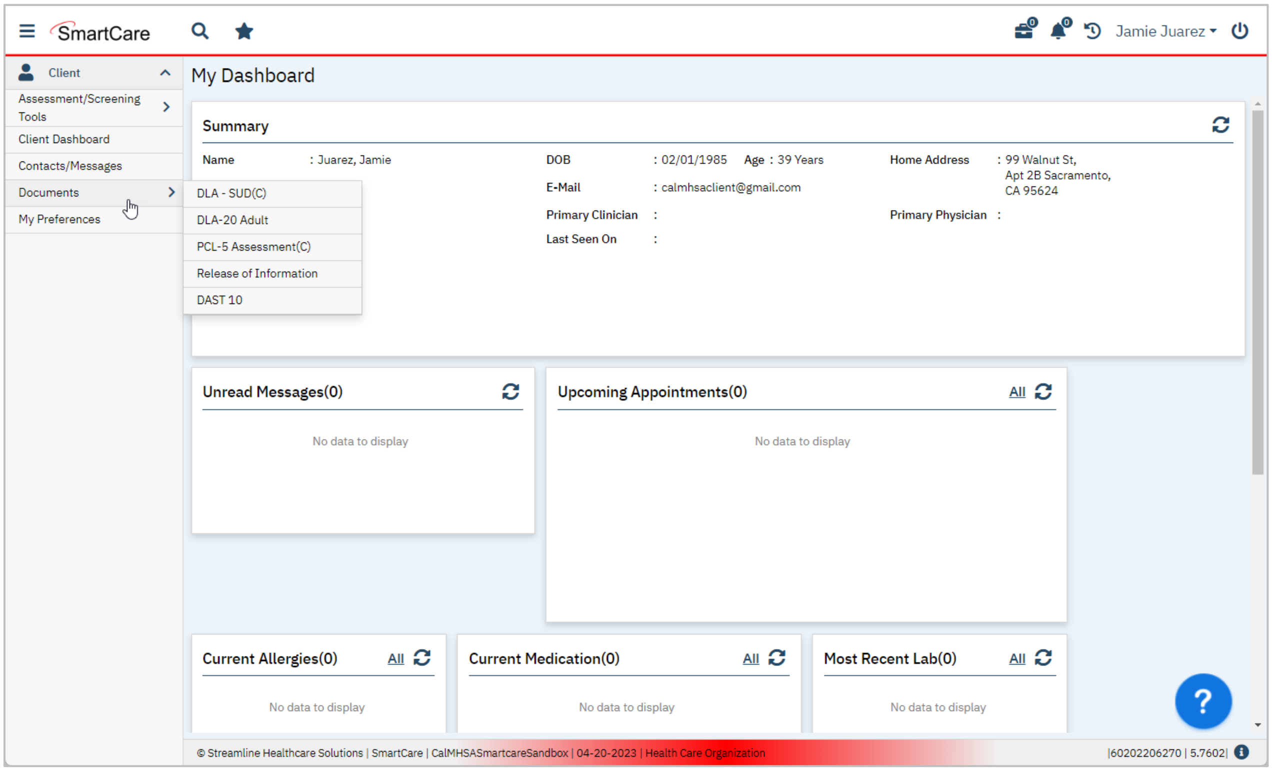
7. **Set up your security questions**. Select a security question from the drop-down list. Then type in the answer to that question. Repeat until you have 3 question and answer pairs. When you next log in, after entering your username and password, you'll be asked one of these questions to confirm your identity.
8. **Click Save**.



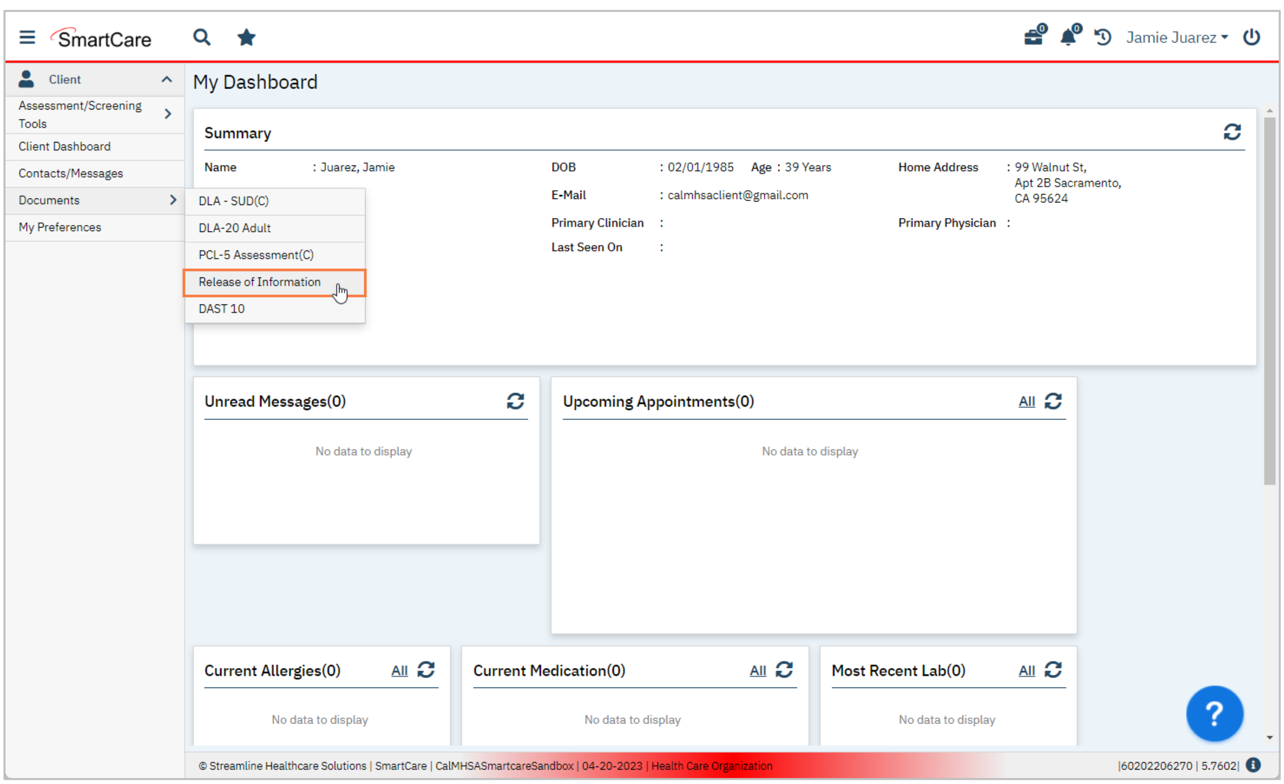
9. This will log you into the Patient Portal. You'll start on the Dashboard screen. Here, you can see things like upcoming appointments, unread messages from your providers, and a summary of your current contact information.



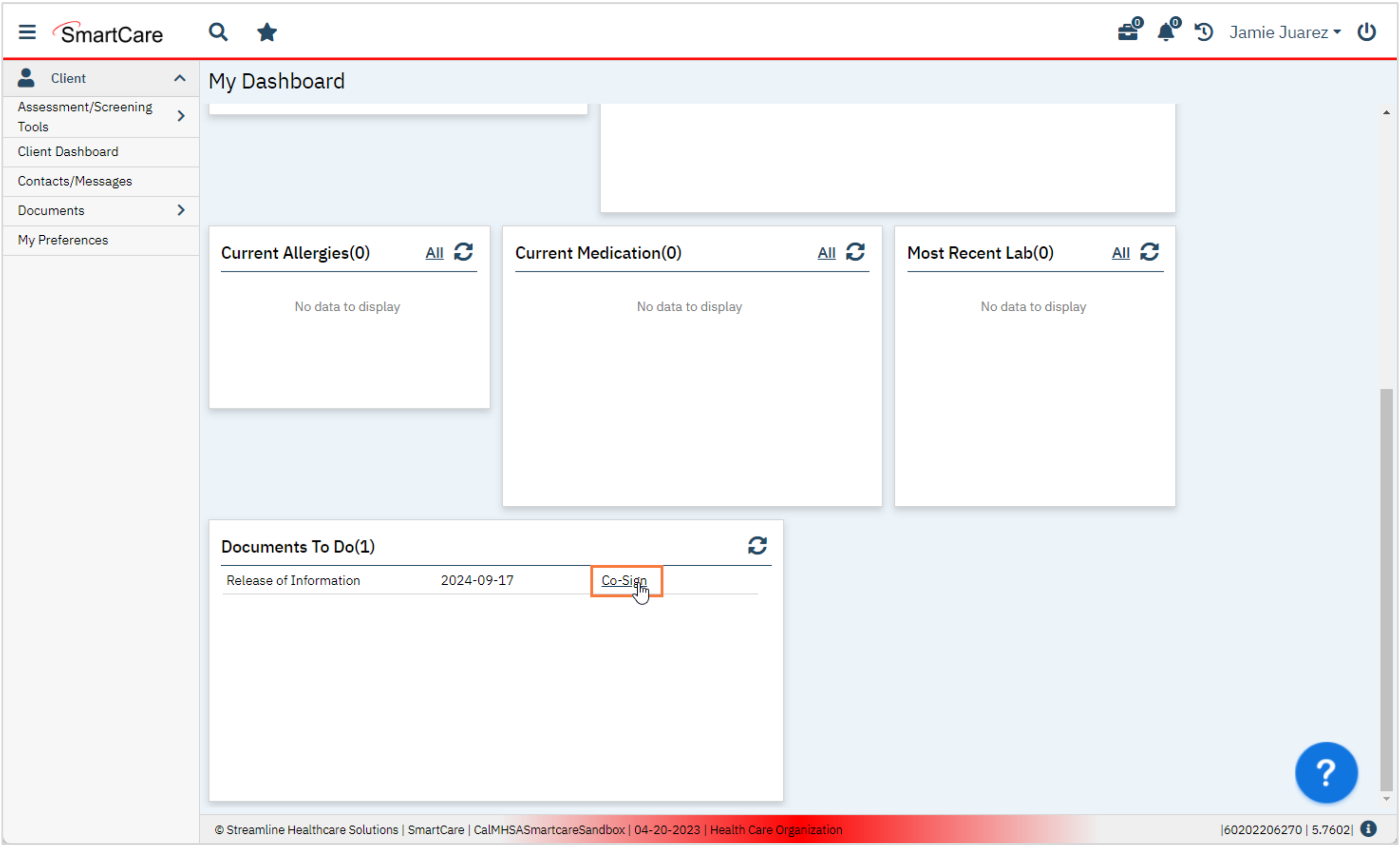
10. On the left side of the screen is a menu. You can hover over options, which will create a fly-out menu.



11. Click on the item you want to view.



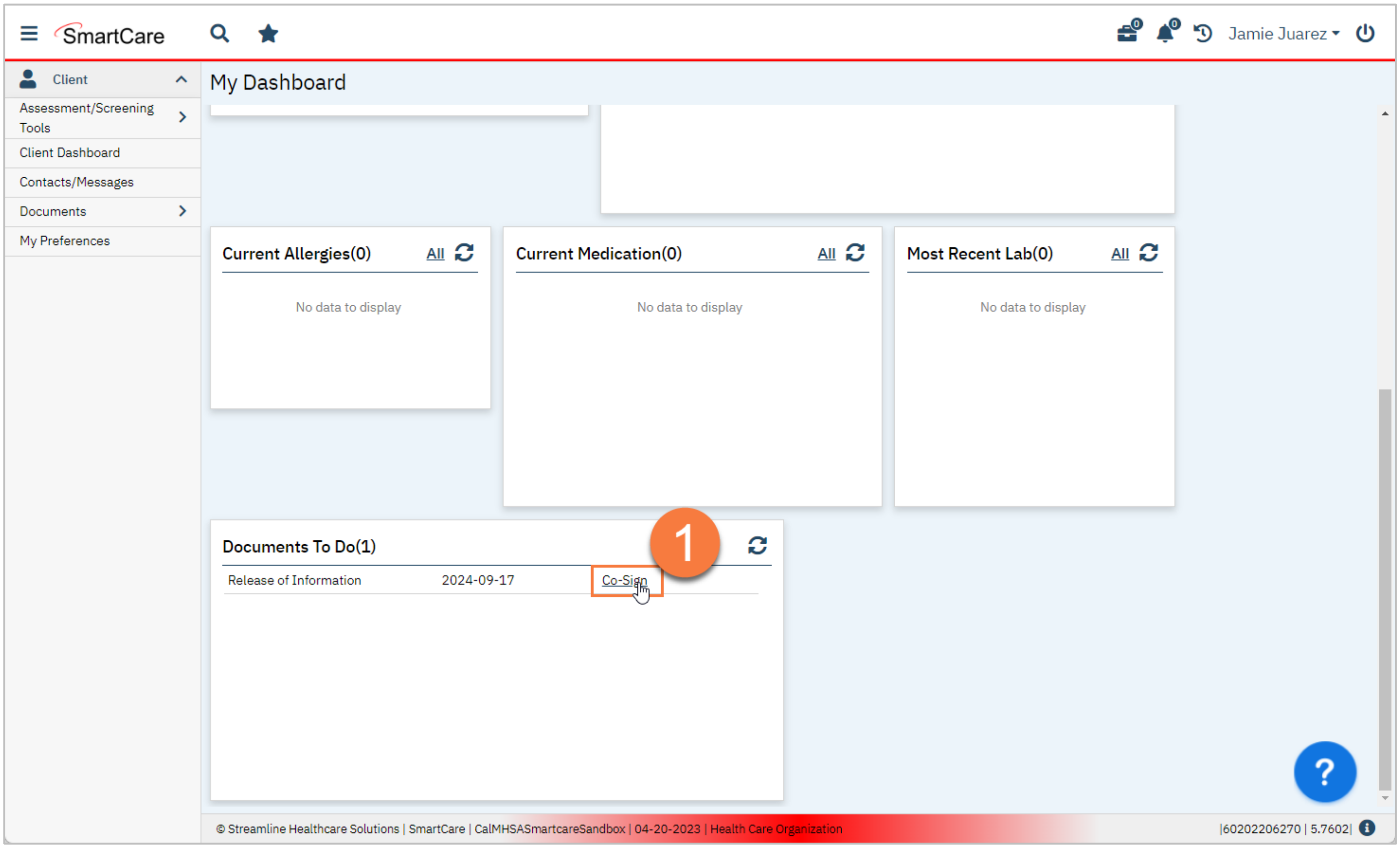
12. There's also a "Documents To Do" section on the dashboard. This will show any documents that you may need to co-sign. Click on the "Co-Sign" link to open that document.



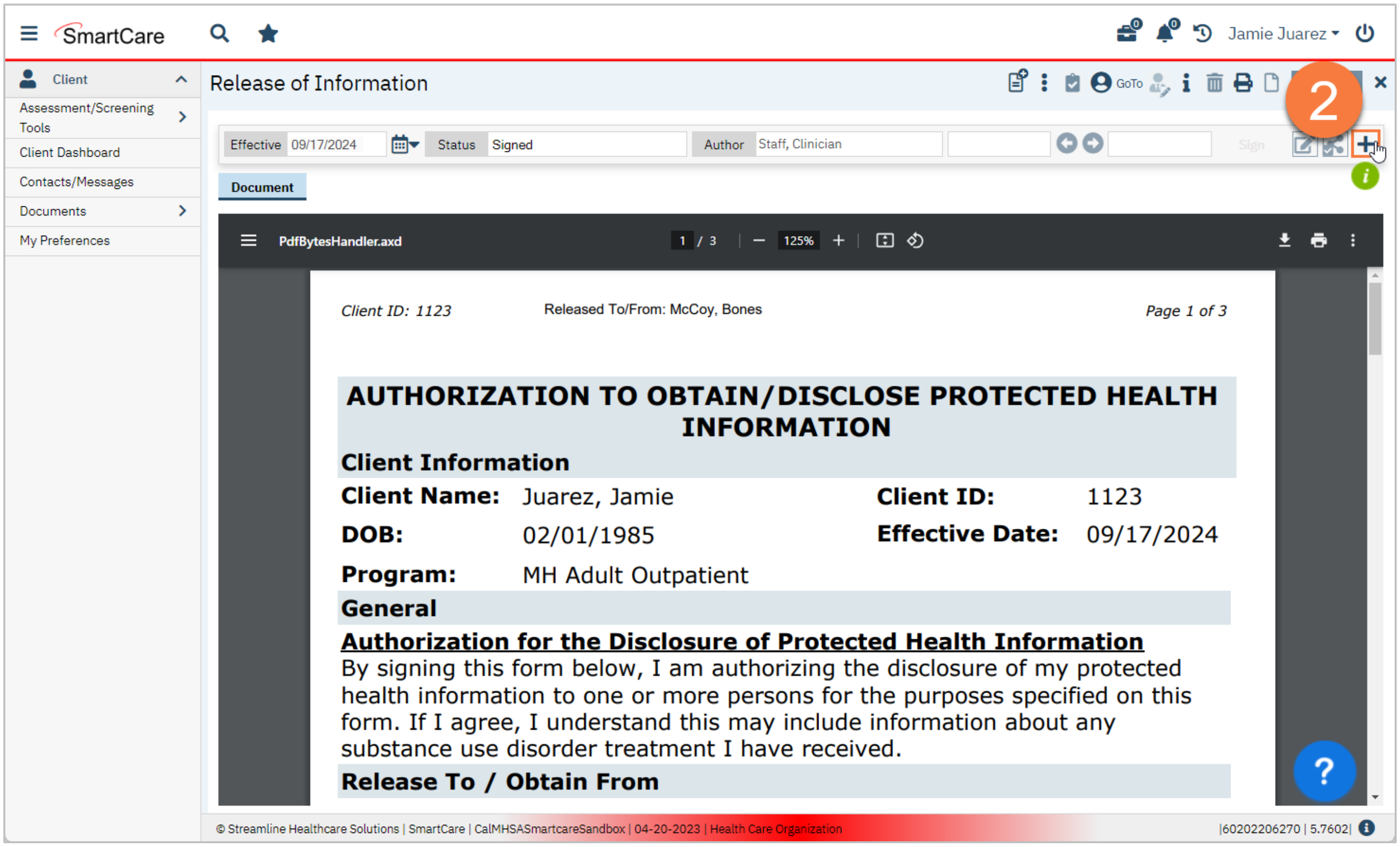
13. This will bring you to the document you are meant to sign.

How to Sign a Document

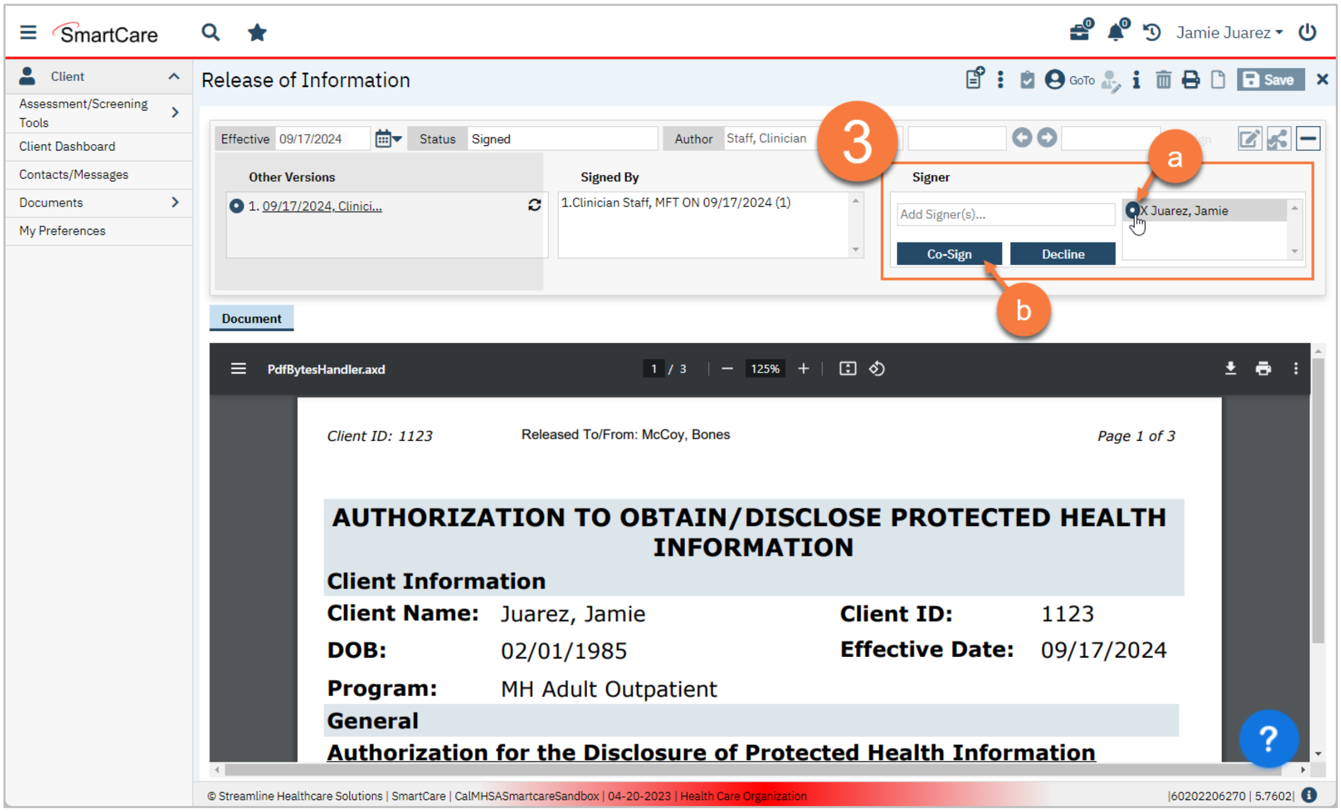
1. On your dashboard, **find the “Documents To Do” section**. This will show any documents that you may need to co-sign. **Click on the “Co-Sign” link** to open that document.



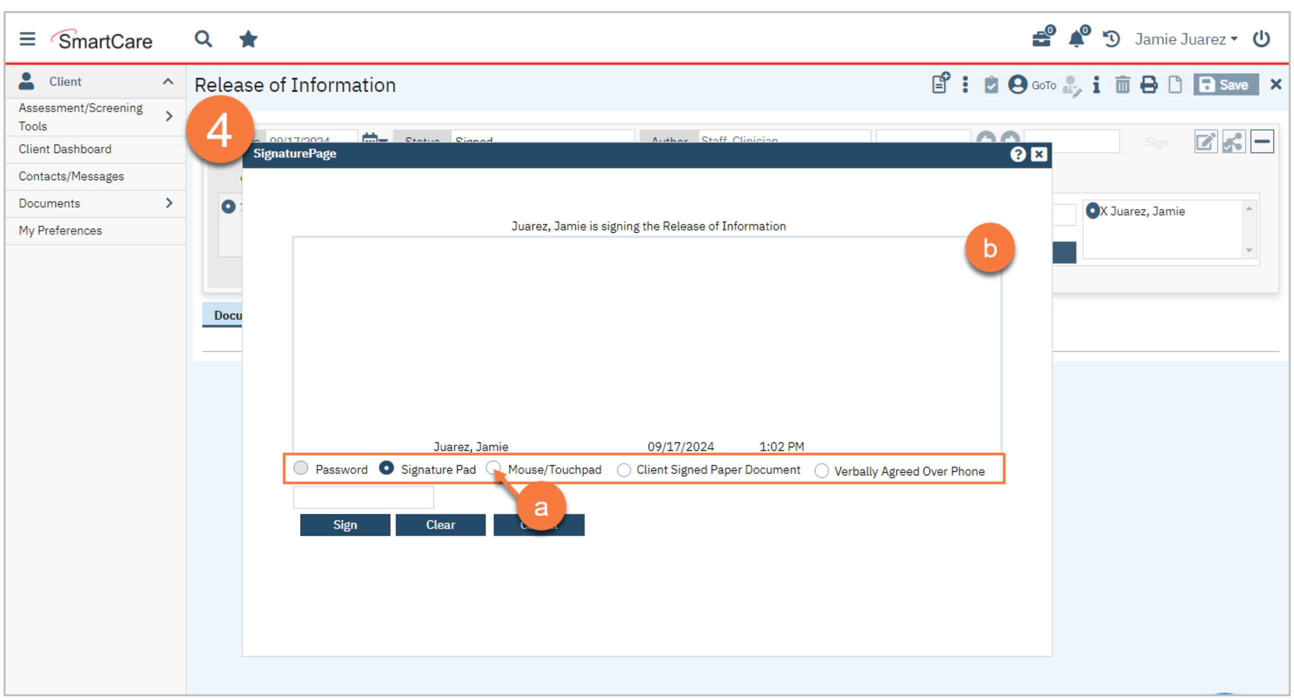
2. This will bring you to the document you are meant to sign. In the upper right corner of the screen, **click on the Plus icon**.



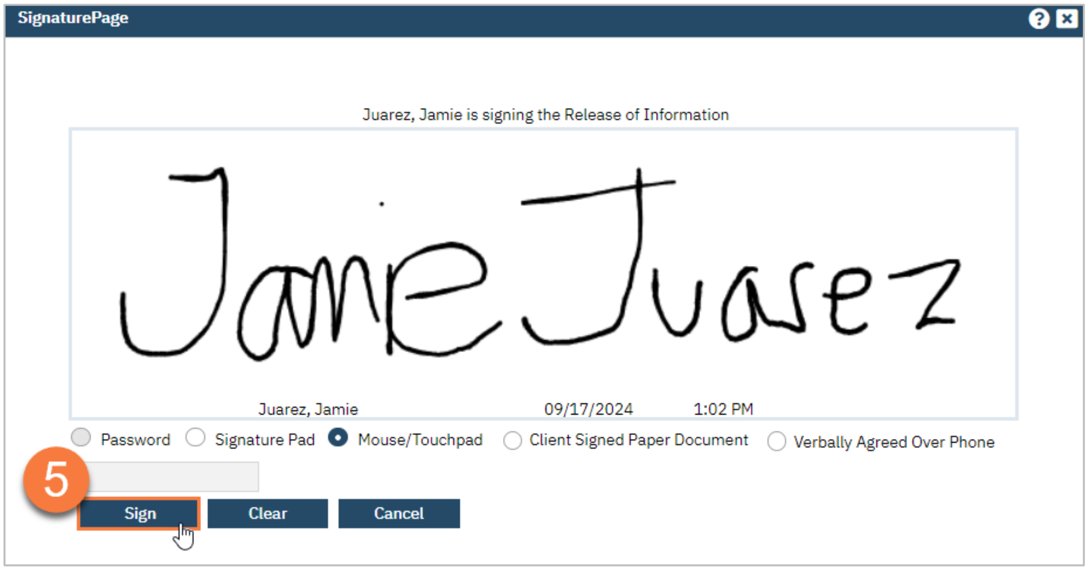
3. This will expand out the document ribbon. **In the Signer section, select your name** by clicking on the circle next to your name (a). **Then click the Co-Sign button** (b).



4. This will bring up a popup window. **Select how you're going to sign**. We recommend selecting "Mouse/Touchpad" (a). That will allow you to **draw your signature in the box** provided (b).



5. Once you're happy with your signature, **click the "Sign" button**. If you want to erase your signature and try again, click the "Clear" button. If you want to cancel your signature, click the "Cancel" button.



6. This will take you back to the document. You can now see that you've signed the document in the "Signed By" section. This will remove the document from your "Documents To Do" section on your dashboard.
7. You can **close the document by clicking on the Close (X)** icon in the upper right corner of the screen.
8. You can also **go back to your dashboard by clicking on the SmartCare icon** in the upper left corner of the screen.