

innovative imaging™



My MergePortal

USER'S GUIDE

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For application support, please contact your My MergePortal provider.

Part	Date	Revision	Description
PPTL-326	May 2015	1.0	Initial version

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Chapter 1 Introduction

My MergePortal provides patients with secure web-based access to their health records, including lab results, medications, recorded drug allergies, etc. My MergePortal is typically installed on a database or communication server.

NOTE: If the main Merge RIS Application Server is unavailable, patients will not be able to access My MergePortal.

NOTE: Some of the features described in this guide may not be available in earlier versions of the software.

About this Guide

This section describes various conventions and visual cues that are used throughout this guide.

NOTE: Cross-references that appear in blue text are hyperlinks.

Screen Captures

This guide uses screen captures to help illustrate various steps and procedures. The screen captures are used as examples only and may differ somewhat from what you see on your monitor.

Drive Letter Conventions

When referring to drive letters, we make the assumptions listed below. If your drive letters are different, then use yours instead.

- Hard Drive = C:
- Floppy Drive = A:
- CD Drive = D:

The examples provided throughout this guide assume the application is installed under the default path.

Notes, Cautions, and Warnings

NOTE: Note messages are used to indicate information which may be helpful or of special interest to you.

CAUTION: Caution messages indicate procedures which, if not observed, could result in a loss of data or damage to the equipment. Do not proceed beyond a CAUTION message until the indicated conditions are fully understood and met.

WARNING: Warning messages indicate procedures or practices which, if not observed, could result in personal injury. Do not proceed beyond a WARNING message until all of the indicated conditions are fully understood and met.

Chapter 2 Using My MergePortal

This section describes the features available to patients in My MergePortal.

Topics covered include:

- [“Patient Login” on page 8](#)
- [“Demographics” on page 9](#)
- [“Patient and Visit Summary” on page 24](#)
- [“My Messages” on page 28](#)
- [“Reminders” on page 30](#)
- [“Education Documents” on page 31](#)
- [“Bill Pay” on page 33](#)
- [“Audit Trail” on page 34](#)
- [“Settings” on page 36](#)

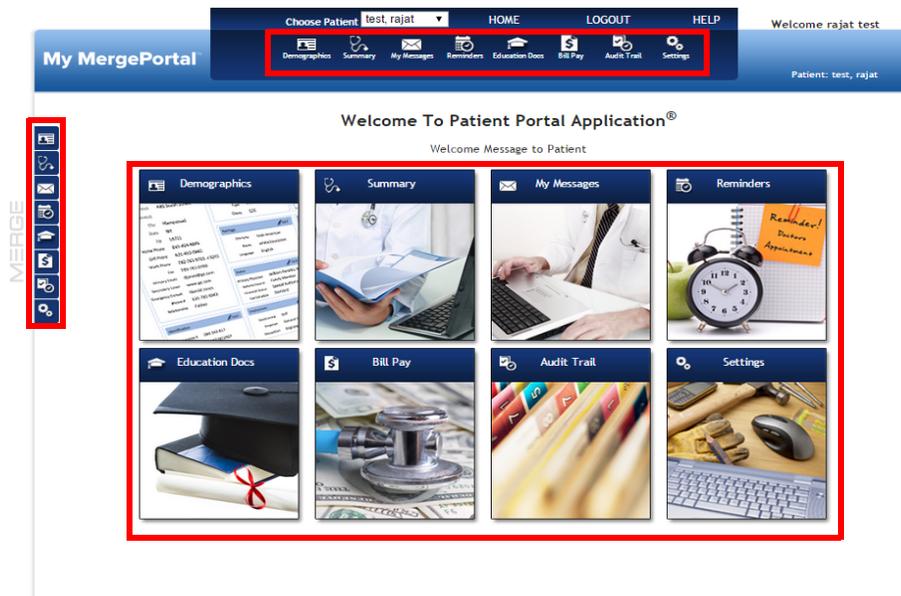
Patient Login

To log in

1. Navigate to the portal address. The Portal Login page opens.



2. Type your **User Name** (email address) and **Password**.
3. Click **Log On**. The portal home page opens.



Each of the staff features can be accessed from three different areas:

- the main icon
- the top menu icon
- the left menu icon

NOTE: The first time you log in, the User Details tab on the Settings page opens.

SETTINGS

Change Password | User Details | Visit Summary Settings | Reminder Settings

Current Email (User Name) : craig.irvine@merge.com

User Display Name : rajat test

Secret Question : In what city did you meet your spouse/significant

Secret Answer : Miami

Save changes

Select a **Secret Question** from the drop-down list and type an answer in the **Secret Answer** field. Click **Save Changes** and the portal home page opens.

Demographics

The Demographics feature of My MergePortal allows patients and patient authorized representatives to view and edit patient demographics.

My MergePortal

Welcome rajat test

Choose Patient test, rajat HOME LOGOUT HELP

Demographics Summary My Messages Reminders Education Docs Bill Pay Audit Trail Settings

Welcome To Patient Portal Application®

Welcome Message to Patient

Demographics Summary My Messages Reminders Education Docs Bill Pay Audit Trail Settings

From the Demographics feature, users can perform the following:

- View and manage patient information such as name and address. See **“Patient Information”** on page 10.
- View and manage insurance plans. See **“Insurance Plans”** on page 11.

- View exams (and view the report of the exam if it is available). See [“Exams” on page 13](#).
- View and manage appointments. See [“Appointments” on page 14](#).
- View and manage medications, and submit refill requests. See [“Medications” on page 15](#).
- View and manage allergies and drug reactions. See [“Allergies” on page 18](#).
- View and manage patient conditions. See [“Conditions” on page 20](#).
- View and manage patient and family health history details. See [“Health History” on page 21](#).
- Download and upload template forms. See [“Forms” on page 23](#).

Patient Information

To view and edit patient information

1. Navigate to the Demographics feature. The Demographics tab opens.

DEMOGRAPHICS

Demo Insurance Exams Medications Allergies Diagnosis Health History Forms

Basic Information *Required

First Name* merge Middle Name Last Name* healthcare
Date of Birth* 01/01/2001 Suffix Gender

Demographics and Vitals

Race Language
Ethnicity Marital Status

Information will be collected during your next visit

Weight 0.0 lbs
Height 0 feet 0 inches
Blood Pressure
Smoking

Contact Information

Address1 Home Ph. Country United States
Address2 Work Ph. Fax
City Mobile Ph. Email ! craig.irvine@merge.com
State Zip. Contact Administrator to change email

Save

2. View and edit the patient information as required.
3. Click **Save** when finished.

Insurance Plans

To manage insurance plans

1. Navigate to the Demographics feature and click the **Insurance** tab to view the plans associated with the patient. The Insurance tab opens.

The screenshot shows the 'DEMOGRAPHICS' section with the 'Insurance' tab selected. A table displays the following data:

Plan	Carrier	Policy No.	Relationship	Insured Name	status	
BLUE CROSS BLUE SHEILD	BCBS	789	Stepfather	Dawn Blue	Active	DeActivate
BLUE CROSS BLUE SHEILD	BCBS	0000000	Self	Beth Test	Active	DeActivate
AETNA	AETNA	877	Self	Beth Test	Active	DeActivate

Below the table is a 'Display' dropdown menu set to 'Active' and a pagination indicator '1 - 3 of 3 items'. An 'Add' button is located at the bottom left.

2. Use the **Display** drop-down list to filter the list by **Active**, **Inactive**, or **All** plans associated with this account.
3. Do one of the following:
 - Click **Activate** or **Deactivate** to activate or deactivate a plan for the patient's account.
 - Click the plan link to open an existing plan.
 - Click **Add** to open the Add Insurance page.

The 'Add Insurance' form contains the following sections and fields:

- Add a new Plan** *Required: Plan* (text input), Search (button)
- Address Information**: Address1, Address2, City, State, Country, Zip Code, Phone (text inputs)
- Plan Information**: Policy No * (text input), OHIP Group No (text input), Status (dropdown menu, currently 'Active'), Deductible Amount * (text input), Group No (text input), Relationship (text input, currently 'Self'), Start date (text input), End Date (text input), Coinsurance Amount (text input), Member No (text input), Co-pay Amount * (text input)

Buttons for 'Save' and 'Cancel' are located at the bottom right.

- Click **Search** to search for insurance carriers.

Search Insurance ✕

Plan

Insurances

Plan	Address1	Address2	City	State	Zip	Phone
AETNA	Testing	Validation	WASHINGTON	DC	20036	
AETNA	P.O. BOX 14089		LEXINGTON	KY	40512	
AETNA CT	PO BOX 981106		EL PASO	AL	79998	
AETNA	PO Box 11679		DAYTONA BEACH	FL	32114	
AETNA	P.O. BOX 14089		LEXINGTON	KY	40512	

1 - 5 of 10 items

- Select a plan. You are returned to the Add Insurance page.
- Enter the details in the Plan Information section (any field with a red asterisk (*) is required). When you are finished, click **Save**.

Appointments

To add a new appointment

1. Click **New Appointment Request**. The Add Appointment Request page opens.

2. Complete the appointment request.
3. Click **Send Request** to send the request to the provider.

To edit an appointment

1. To send a request for an appointment change, the click the corresponding Change Appt icon. The Change Appointment Request dialog opens.

NOTE: The practice decides the time-span of how close to the day of the appointment it can be rescheduled. This icon will only appear next to those appointments that fall within that time period, and are in a Scheduled status.

2. Enter the required information (the desired new appointment date and time, and comments).
3. Click **Send Request**. The request is sent to the provider for this new appointment.

To view appointment requests

1. You can view appointment requests by clicking the **Show Appointment Requests** link. The Appointment Requests list is displayed.

Provider	Requested Date	Created Date	Comments	Visit Status
Test, Dawn2	07/25/2014 10:30:00 AM	07/22/2014 02:23:00 PM	new	Scheduled
Test, Dawn2	07/30/2014 10:00:00 AM	07/22/2014 02:17:00 PM	ee	Responded
Test, Dawn2	07/30/2014 09:30:00 AM	07/22/2014 02:16:00 PM	qq	Cancelled
Test, Dawn2	07/31/2014 09:30:00 AM	07/22/2014 02:12:00 PM	change	Rescheduled
Test, Dawn2	07/24/2014 08:30:00 AM	07/08/2014 12:13:00 PM	test	Received

2. Click **Hide Appointment Requests** to hide the list.

Medications

To manage medications

1. Navigate to the Demographics feature and click the Medications tab to display a list of medications, including the Medication Name, Start Date, Quantity, Days Of Supply, Number of Refills, and Electronic Order (Yes/No).

Medication	Start Date	Quantity	Days of Supply	No. of Refills	Electronic Order	Provider	Pharmacy
naproxen 500 mg oral tablet	06/01/2015	30	15	1	No		
acetaminophen 325 mg oral tablet	06/01/2015	42	14	2	No		

2. Do one of the following:
 - Click **Add** to add a medication. See [“To add a medication” on page 16](#).
 - Click the name of a medication to edit the medication. See [“To edit a medication” on page 17](#).
 - Click **Print** to open a print preview page from which you can print the medications list.
 - Click **Show Refill Requests**. See [“To view and submit refill requests” on page 17](#).
 - Click a trash can icon located to the right to remove the corresponding medication.

To add a medication

1. In the Medications tab, click **Add**. The Add Medications dialog opens.

2. Click **Search** to search for the medication. The Search Medication dialog opens. Type a search term and click **Search**. A list of matches is displayed.

Name	Matched Name	Generic Product Name
(G) esomeprazole-naproxen	naproxen-esomeprazole	(G) esomeprazole-naproxen 20 mg-375 mg oral delayed release tablet
(G) esomeprazole-naproxen	naproxen-esomeprazole	(G) esomeprazole-naproxen 20 mg-500 mg oral delayed release tablet
(G) naphazoline ophthalmic	naphazoline 0.012% ophthalmic gel forming solution	(G) naphazoline 0.012% ophthalmic gel forming solution
(G) naphazoline ophthalmic	naphazoline 0.012% ophthalmic solution	(G) naphazoline 0.012% ophthalmic solution
(G) naphazoline ophthalmic	naphazoline 0.012% with glycerin ophthalmic solution	(G) naphazoline 0.012% with glycerin ophthalmic solution

3. Click the medication and then complete the remaining fields in the Add Medication dialog.

4. Click **Save**. The medication is added to the list.

To edit a medication

1. In the Medications tab, click the name of the medication that you want to edit. The Edit Medication dialog opens.

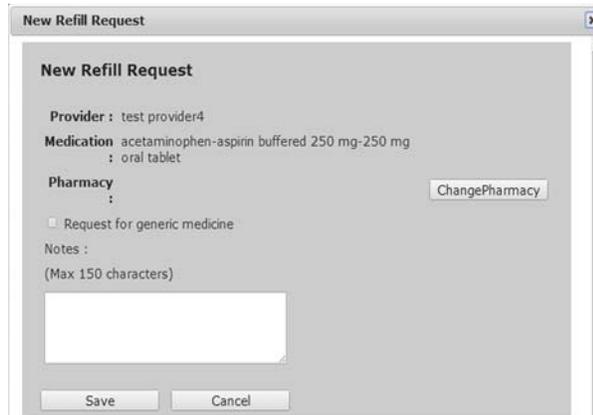
2. Edit the values as required and click **Save**.

To view and submit refill requests

1. In the Medications tab, click **Show Refill Requests**. The Refill Requests are displayed.

Medication	Provider	Status	Requested Date *
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Denied	06/20/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	06/20/2014
acetaminophen-pseudoephedrine 500 mg-30 mg oral tablet	Smith Jones	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014
dextromethorphan-pseudoephedrine 7.5 mg-15 mg/5 mL oral liquid	Test Prescriber	Pending Approval	04/01/2014

- You can request a refill by clicking  . The New Refill Request page opens.

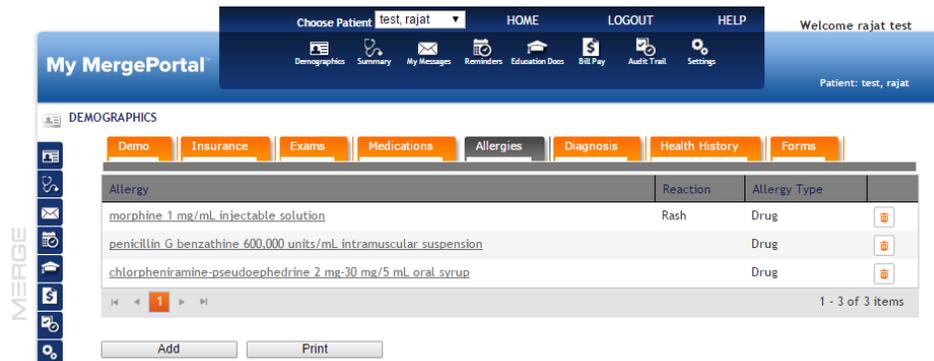


- Optionally change the pharmacy by clicking **Change Pharmacy**. You can then search for and select the pharmacy that you want to use for this refill.
- Optionally request a generic medicine or enter notes and click **Save**. The refill request is sent to the provider.

Allergies

To view and print a patient's list of allergies

- Navigate to the Demographics feature and click the **Allergies** tab to display a list of allergies, reactions, and allergy types.

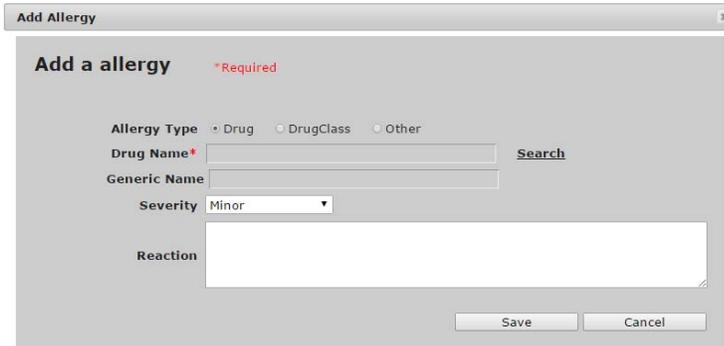


Allergy	Reaction	Allergy Type
morphine 1 mg/mL injectable solution	Rash	Drug
penicillin G benzathine 600,000 units/mL intramuscular suspension		Drug
chlorpheniramine-pseudoephedrine 2 mg-30 mg/5 mL oral syrup		Drug

- Do one of the following:
 - Click **Add** to add a new allergy.
 - Click **Print** to open a print preview page from which you can print the allergies list.
 - Click a trash can icon located to the right to remove the corresponding medication.

To add an allergy

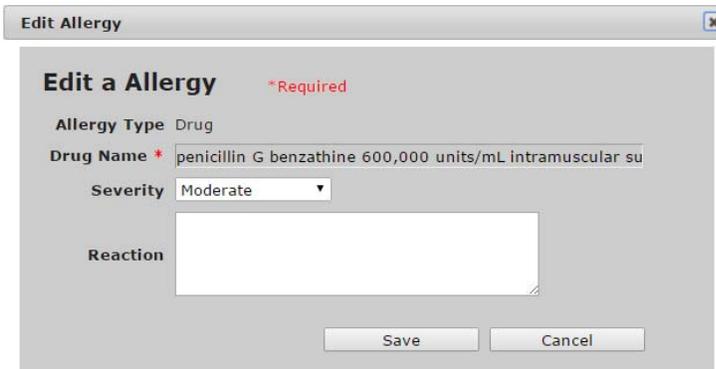
1. In the Allergies tab, click **Add**. The Add Allergy dialog opens.



2. Select the **Allergy Type** and then click **Search** to search for the **Drug Name**
3. Select the cause of the allergy from the search results and complete the rest of the fields in the Add Allergy dialog.
4. Click **Save**.

To edit an allergy

1. In the Allergies tab, click the name of the allergy that you want to edit. The Edit an Allergy dialog opens.

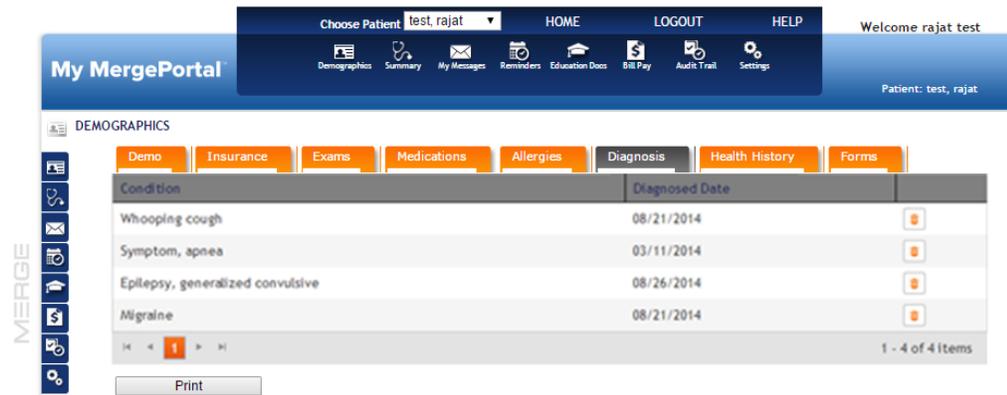


2. Edit the fields as required and click **Save**.

Conditions

To view conditions

1. Navigate to the Demographics feature and click the **Conditions** tab to view a list of patient conditions and the date of the diagnosis.



The screenshot shows the My MergePortal interface. At the top, there is a navigation bar with 'Choose Patient' set to 'test.rajat', and links for HOME, LOGOUT, and HELP. Below this is a secondary navigation bar with icons for Demographics, Summary, My Messages, Reminders, Education Docs, Bill Pay, Audit Trail, and Settings. The main content area is titled 'DEMOGRAPHICS' and has several tabs: Demo, Insurance, Exams, Medications, Allergies, Diagnosis (selected), Health History, and Forms. The 'Diagnosis' tab displays a table with the following data:

Condition	Diagnosed Date	
Whooping cough	08/21/2014	
Symptom, apnea	03/11/2014	
Epilepsy, generalized convulsive	08/26/2014	
Migraine	08/21/2014	

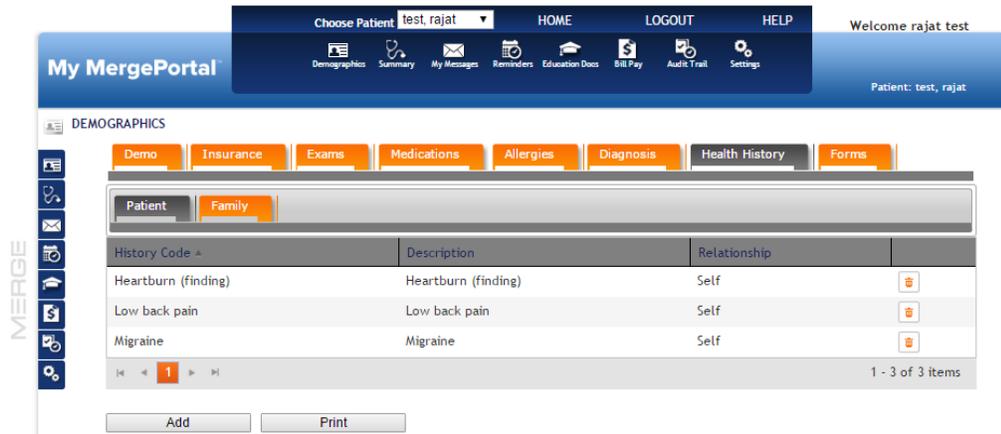
At the bottom of the table, there is a pagination control showing '1 - 4 of 4 items' and a 'Print' button.

2. Do one of the following:
 - Click **Print** to open a print preview page from which you can print the conditions list.
 - Click a trash can icon located to the right to remove the corresponding condition.

Health History

To manage a patient's health history

1. Navigate to the Demographics feature and click the **Health History** tab to view your health history, which includes a history code, description and relationships.



The Patient subtab displays your history and the Family subtab displays your family's history.

2. Do one of the following:
 - Click **Add** to add a health history record.
 - Click **Print** to open a print preview page from which you can print the condition history list.
 - Click a trash can icon located to the right to remove the corresponding condition.

To add a health history record

1. Click **Add** in either the **Patient** or **Family** subtabs. The Add Health History dialog opens.

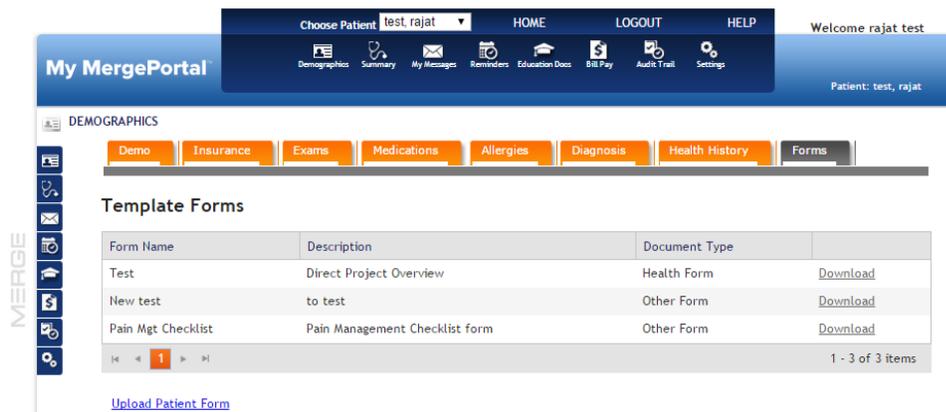


2. Do one of the following:
 - Click **Search** to search for and select the appropriate history code.
 - Click **Add Multiple** to view a list of history codes, from which you can select two or more. Click **Save**.
3. If recording a history entry for yourself, the **Relationship** field is set as **Self**. If recording a history entry for a family member, identify the relationship of the family member from the **Relationship** drop-down list.
4. The **Description** field entered automatically using the description from the History Code.
5. Click **Save**. The Add Health History dialog closes and the Patient Health History list displays the new history entry.

Forms

To download and upload forms

1. Navigate to the Demographics feature and click the **Forms** tab to display a list of available forms.

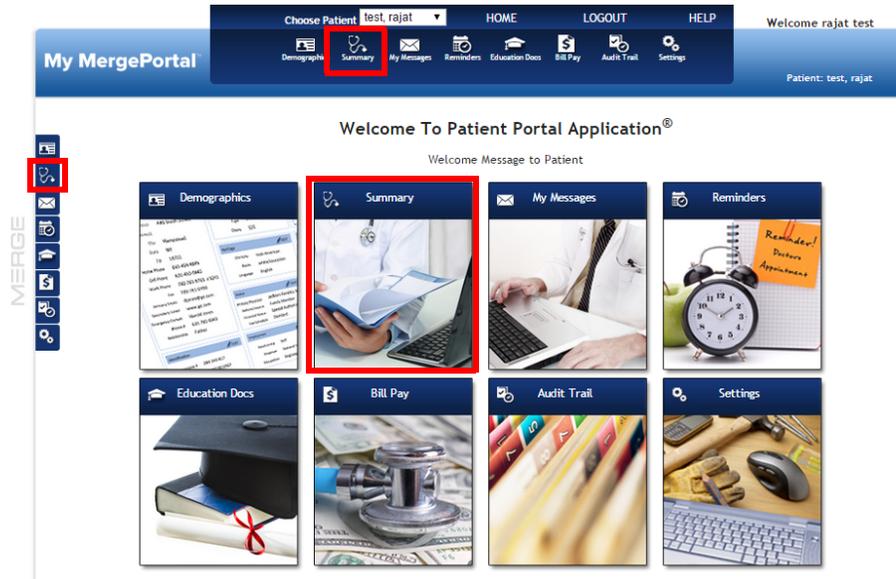


2. Click **Download** for one of the listed forms to download it. When the download completes, open the download from either your browser notification or navigate to your downloads folder and open.
3. Edit the form as required. Save and close the form.
4. To upload the completed form, click **Upload Patient Form**. The Upload Form dialog opens.

5. Type the **File Name** and **Description** and select a **Form Type**. Click **Choose File** to navigate to and select the file that you want to upload.
6. Click **Upload**. A confirmation appears upon successful upload, and the Upload Form dialog closes.

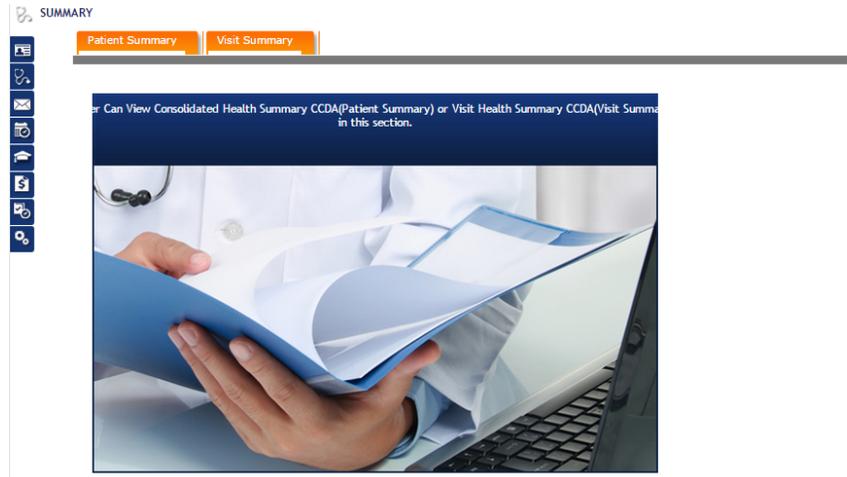
Patient and Visit Summary

The Summary feature of My MergePortal allows patients and patient authorized representatives to view, download, print, and transmit patient and patient visit summaries.



To view the patient and/or patient visit summary

1. Navigate to the Summary feature, the Summary page opens.



2. Click the summary tab you want to open: **Patient Summary** or **Visit Summary**.

Ambulatory Summary	
Patient	rajat test
Date of birth	October 10, 2009, 00:00:00, EST
Sex	Male
Race	
Ethnicity	
Preferred Language	Information not available
Contact info	, USA
Patient IDs	1110011 2.16.840.1.113883.19
Document Id	92JvixIXrL9djh 2.16.840.1.113883.19
Document Created:	June 3, 2015, 09:55:35, EST
Performer (primary care provider)	
Author	NA
Contact info	325 BILL FRANCE BLVD DAYTONA BEACH, FL 32114
Entered by	NA of DAYTONA BEACH
Contact info	325 BILL FRANCE BLVD DAYTONA BEACH, FL 32114
Document maintained by	DAYTONA BEACH
Contact info	325 BILL FRANCE BLVD DAYTONA BEACH, FL 32114 Tel: 1111111111

Table of Contents

- Allergies, Adverse Reactions, Alerts

3. Do one of the following:

- In the Patient Summary tab, scroll to the Table of Contents section to quickly navigate to different sections of the summary.

SUMMARY

Patient Summary | Visit Summary | Download

Document maintained by: DAYTONA BEACH

Contact info: 325 BILL FRANCE BLVD
DAYTONA BEACH, FL 32114
Tel: 386555121

Table of Contents

- Allergies, Adverse Reactions, Alerts
- Problems
- Procedures
- Results
- Encounters
- Plan of Care
- Social History
- Vital Signs

Allergies, Adverse Reactions, Alerts

Type	Substance	Status	Reaction	Procedure Intervention Code	Medication Intervention Code
Drug Allergy	acetaminophen 325 mg oral tablet	Active	rashes		
Other	EggPlant	Active	NA		
Other	Latex	Active	NA		
Drug Class Allergy	penicillin	Active	NA		

- In the Visit Summary tab, select one of the visit Summaries to view. The selected Visit Summary opens.

Patient Summary | Visit Summary | Download | Print | Transmit

Office Visits

Visit Date	Provider Name	Location	VisitReason
01/20/2011 01:20 PM	JOHN.DOE	DAYTONA BEACH	Annual Exam
01/15/2011 04:00 PM	JOHN.DOE	DAYTONA BEACH	Annual Exam
12/15/2012 05:40 PM	JOHN.DOE	DAYTONA BEACH	Annual Exam
12/01/2012 05:00 PM	JOHN.DOE	DAYTONA BEACH	Annual Exam

Your CCD contains only Sections you saved. Click [here](#) to Change your Clinical Visit Settings

Clinical Summary: Consolidated CDA

Patient	Abe Abraham		
Date of Birth	August 27, 1930, 00:00:00 -0400	Sex	Male
Race	White	Ethnicity	Hispanic or Latino

To select which sections are displayed in the Visit Summary, see [“To select visit summary sections” on page 38](#).

To download a summary

1. Click **Download** from the summary tab you want to download. The Download dialog opens.



Download Health Record

[Why do I need to enter a password?](#)

Password (min 8 chars):

Confirm Password:

2. Type your password in both fields and click **Download**. A ZIP file is created containing three files: a CCD XML document, a CCD XSL Stylesheet, and a TXT file.

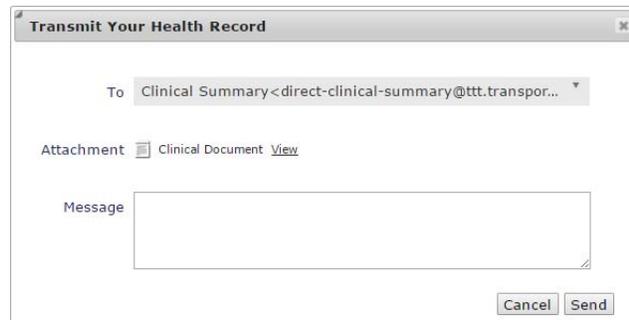
The ZIP file can be unzipped using '7 zip'. You are prompted to type the password specified during download to unzip the files.

To print a summary

1. Click **Print** from the summary tab you want to print. The print preview and set up options are displayed.
2. Select the printer settings and print the summary.

To transmit a summary

1. Click **Transmit** from the summary tab you want to transmit. The Transmit Your Health Record dialog opens.



Transmit Your Health Record

To: Clinical Summary <direct-clinical-summary@ttt.transpor...>

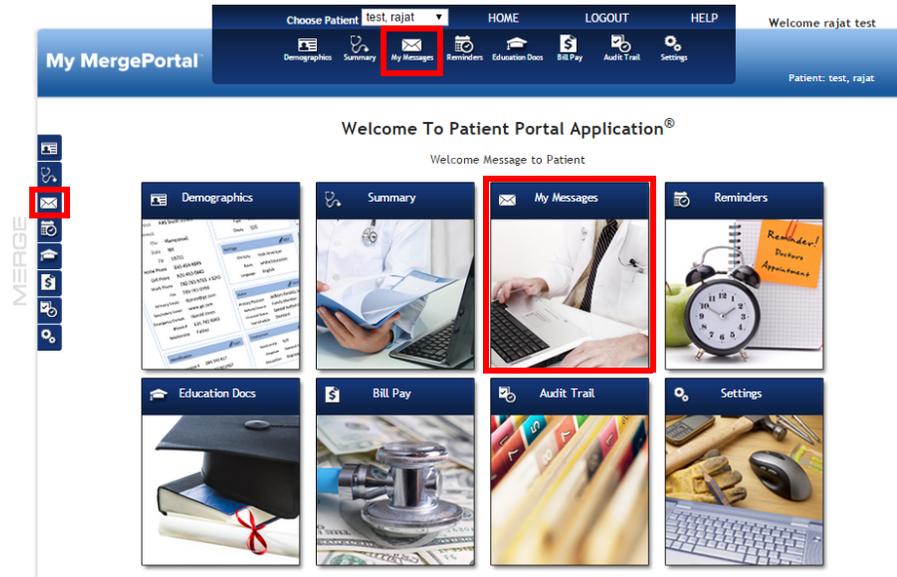
Attachment:  Clinical Document [View](#)

Message:

2. Select the appropriate recipient from the **To** drop-down list.
3. Next to **Attachment**, click **View** to display a preview of the summary that will be sent to the recipient.
4. Type a **Message** to the recipient.
5. Click **Send**. The summary is transmitted to the selected recipient.
6. A message is displayed indicating if the summary has been sent successfully or not.

My Messages

The My Messages feature of My MergePortal allows patients and patient authorized representatives to send and receive emails from and to My MergePortal staff users.



To view My Messages

1. Navigate to My Messages. The My Messages page opens and displays a list of messages sent from staff users. Unread emails appear in bold.

MY MESSAGES

Messages

Inbox(0 unread)

Sent Date	From	Subject	Message
1/15/2014 4:29:46 PM	Joshi,Arin	test	aa
1/15/2014 4:27:30 PM	Joshi,Arin		
12/19/2013 5:04:32 PM	Joshi,Arin	test message	q
12/13/2013 4:06:44 PM	Joshi,Arin	CALJ 1:06 4:06 East	CALJ 1:06 4:06 East
12/13/2013 3:39:45 PM	Joshi,Arin	12:39 california 3:39 East	12:39 calJ 3:39 East
12/4/2013 5:58:37 AM	Joshi,Arin	RE:TEST on 12-04-2013	On Wednesday, December 04...
11/22/2013 10:14:09 AM	Joshi,Arin	TEST ID NOT NAME 9:56	TEST ID NOT NAME 9:56
11/20/2013 11:03:03 AM	Joshi,Arin	Re	On Wednesday, November 20...
11/18/2013 3:53:17 PM	Joshi,Arin	RE:m1	reply to etrans Lalit 134...
11/11/2013 4:53:48 AM	Joshi,Arin	Inbound.in	Inbound.in

1 - 10 of 11 items

[Create](#) [Archived Messages](#) [Sent Messages](#)

- Click the **Sent Messages** link on the My Messages page to view sent messages.



- Click a message line item to view the message. The Message Details dialog opens where you can reply to, archive, or close the message.



To create a new message

- Click the **Create** link at the bottom of the My Messages page. The Create Message dialog opens.

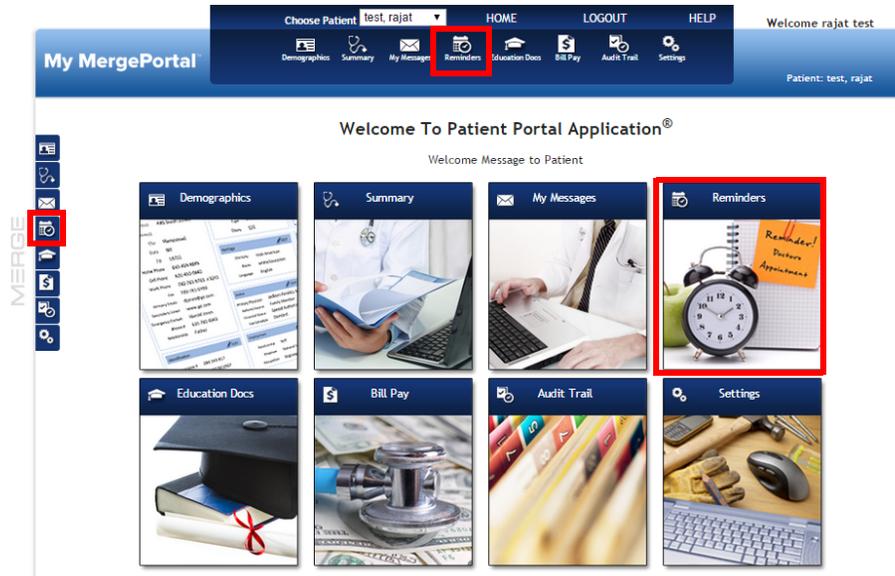


- Select a staff user recipient from the **To** drop-down list.
- Type a message **Subject**.
- Type a **Message** to the recipient.
- Click **Send** to send the message to the specified recipient.

NOTE: You can look at archived messages by clicking the **Archive Messages** link.

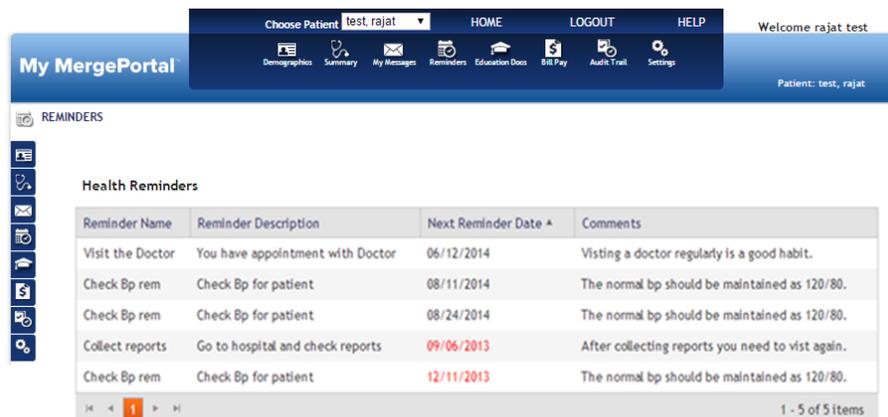
Reminders

The Reminders feature of My MergePortal allows you to view a list of health reminders.



To view reminders

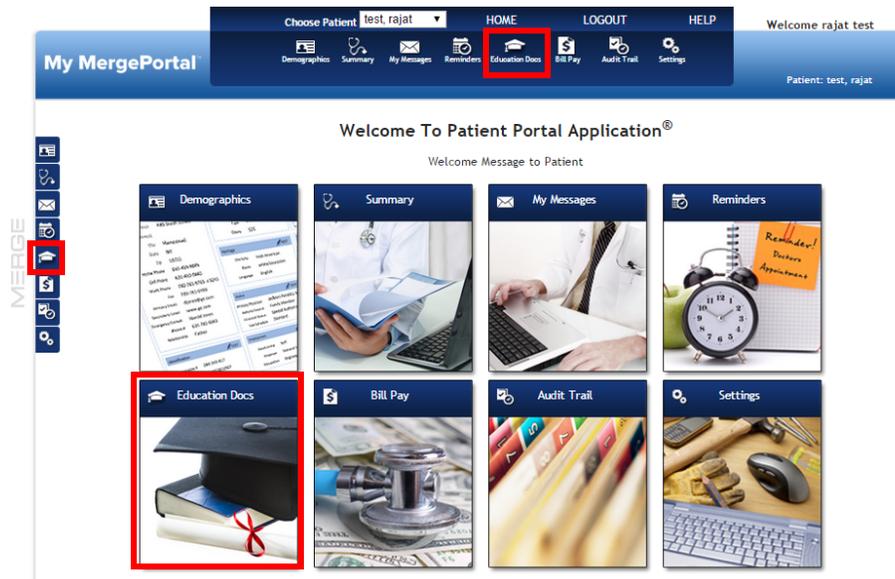
1. Navigate to the Reminders feature. The Health Reminders page opens displaying a list of reminders.



2. For information on disabling reminder emails, see [“To enable or disable reminder emails”](#) on page 38.

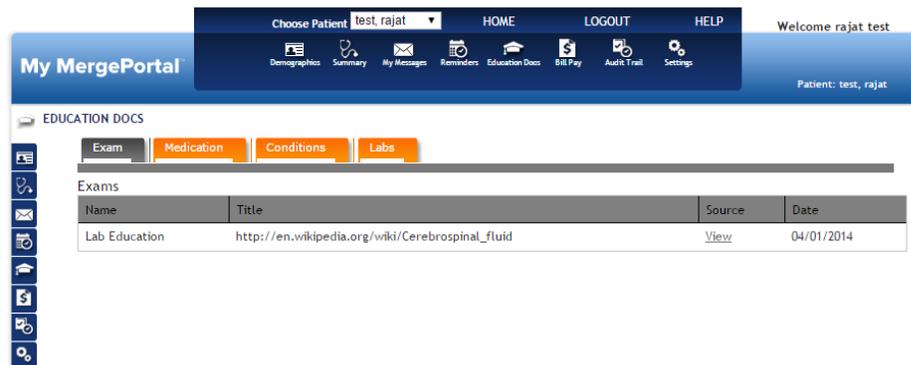
Education Documents

The Education Documents feature of My MergePortal allows patients to view documents that could be informative in the categories of Exams, Medications, Conditions, and Labs.



To view documents

1. Navigate to the Education Docs feature. The Education Docs page opens and defaults to the Exam tab.

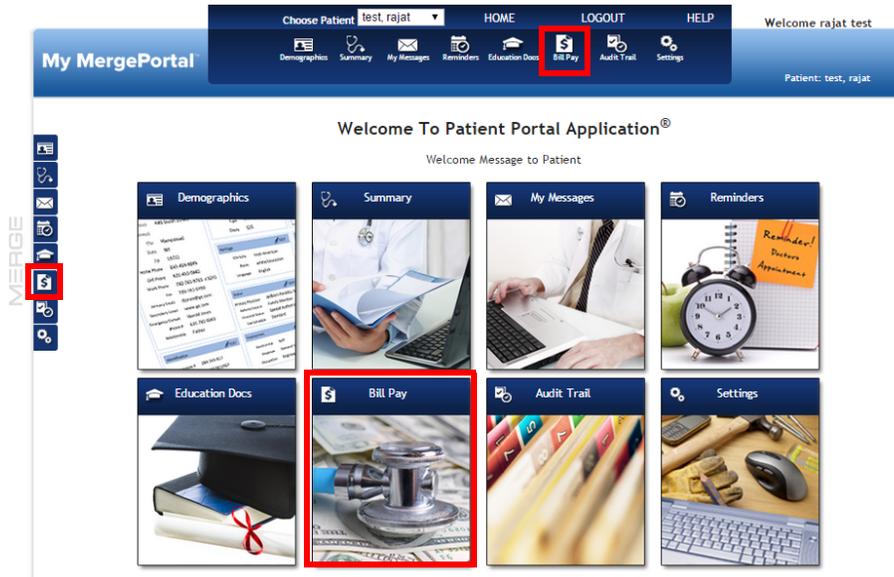


2. Click a document type tab from the following available tabs:
 - **Exam** — enables you to view education documents. Document information includes Document Name, Document Title, a link to the doc source and the date the document was provided to the patient.

- **Medication** — enables you to view documents pertaining to past medications. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.
 - **Conditions** — Enables you to view documents pertaining to past conditions. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.
 - **Labs** — Enables you to view documents pertaining to past lab procedures. This information includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient. You can click the link in the source column to view the document in a new browser tab.
3. Click a **View** link from the **Source** column to view the corresponding document.

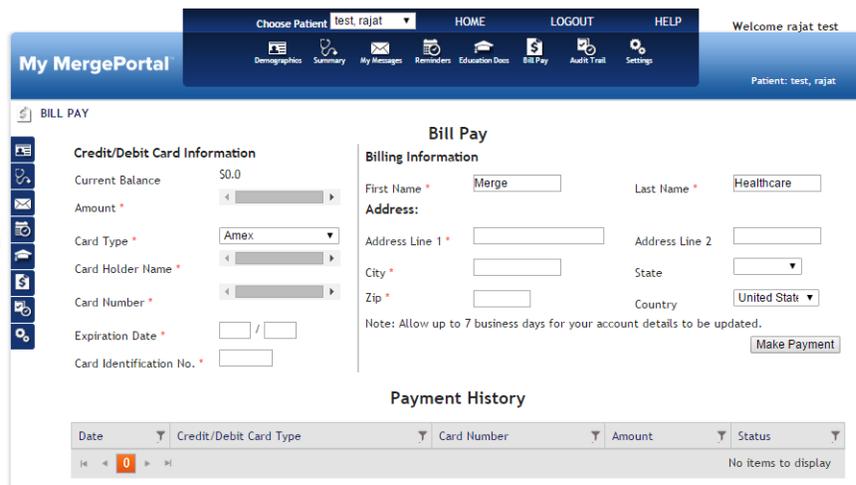
Bill Pay

The Bill Pay feature of My MergePortal enables you to make payments and view payment history.



To enter payment information

1. Navigate to the Bill Pay feature. The Bill Pay page opens.

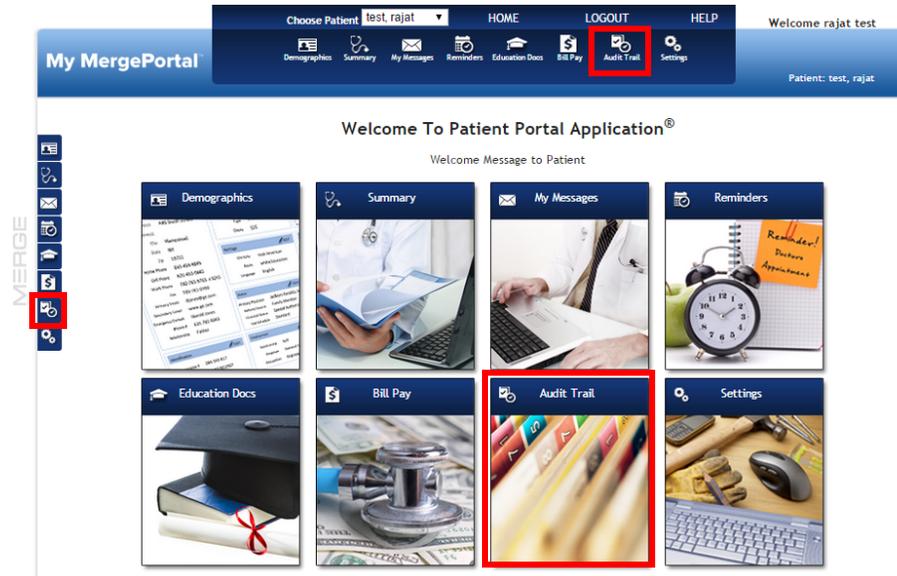


2. Enter payment information in the Bill Pay section. The billing information is automatically populated with information associated with the patient.

3. Click **Make Payment**.
4. View your payment history and payment status in the Payment History section.

Audit Trail

The Audit Trail feature of My MergePortal allows patients to view a report of all of the portal actions they have taken during a specific date range.



To view the audit log

1. Navigate to the Audit Trail feature. The Audit Trail page opens.

The screenshot shows the 'My MergePortal' interface. At the top, there is a navigation bar with 'Choose Patient' set to 'test, rajat', and links for 'HOME', 'LOGOUT', and 'HELP'. Below this is a secondary navigation bar with icons for 'Demographics', 'Summary', 'My Messages', 'Reminders', 'Education Docs', 'Bill Pay', 'Audit Trail', and 'Settings'. The 'Audit Trail' page is displayed, featuring a search area with 'From Date' and 'To Date' both set to '6/3/2015' and an 'ActionType' field. A 'Search' button is present. Below the search area is a table with the following columns: Patient ID, User Name, Patient Name, Log Date, Action Name, and Action Description. The table shows 10 entries, all with Patient ID 1440 and User Name 'craig.irvine@merge.com'. The actions include 'Accessed' for viewing education documents, logging in, and viewing patient messages. The page also includes a 'Show 10 entries' dropdown and a search box within the table area.

Patient ID	User Name	Patient Name	Log Date	Action Name	Action Description
1440	craig.irvine@merge.com	test, rajat	6/3/2015 10:02:58 AM	Accessed	User craig.irvine@merge.com viewed Education Documents of patient: test, rajat
1440	craig.irvine@merge.com	test, rajat	6/3/2015 10:02:52 AM	Accessed	Patient with User Name: 'craig.irvine@merge.com', Logged In.
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:47:48 AM	Accessed	User craig.irvine@merge.com viewed Education Documents of patient: test, rajat
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:47:44 AM	Accessed	Patient with User Name: 'craig.irvine@merge.com', Logged In.
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:33:31 AM	Accessed	User craig.irvine@merge.com viewed Health Reminder Information of patient: test, rajat
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:29:09 AM	Accessed	Viewed Patient Messages
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:29:07 AM	Accessed	Viewed Patient Messages
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:29:02 AM	Accessed	Viewed Patient Messages
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:28:43 AM	Accessed	User craig.irvine@merge.com viewed sent messages of patient : test, rajat
1440	craig.irvine@merge.com	test, rajat	6/3/2015 9:28:43 AM	Accessed	User craig.irvine@merge.com viewed set message for patient : test, rajat messageid 939

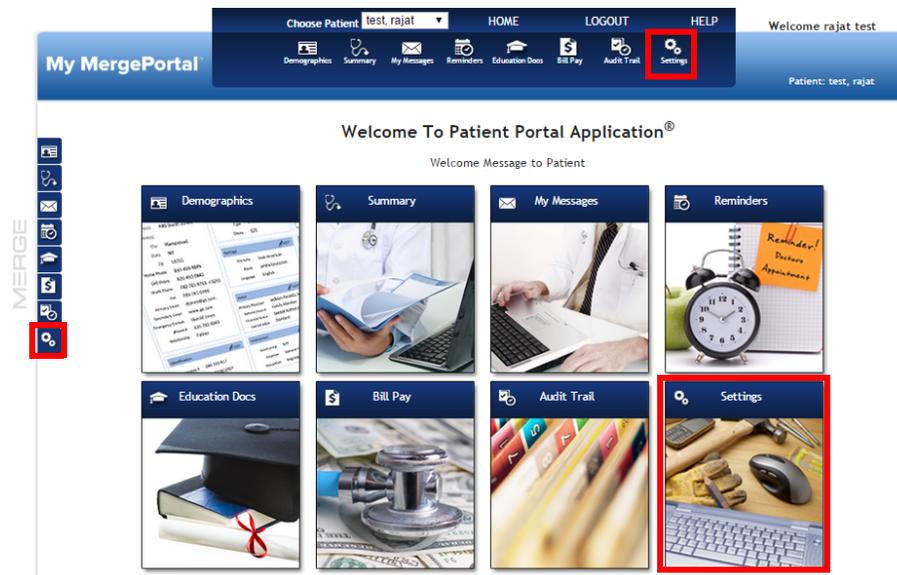
2. The **From** and **To** dates default to the current date. Adjust the dates as required.
3. If desired, type an **ActionType** to narrow the search results.
4. Click **Search**. The list is updated.

NOTE: The **User Name** field indicates the user name of the person who took the action. The **Patient Name** field indicates the patient related to the action that was taken. The values in these fields will only be different if a patient-authorized representative took action in the portal on behalf of a patient.

Settings

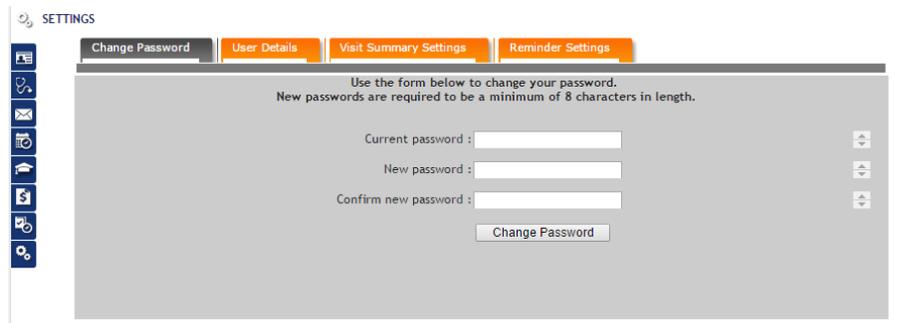
In the Settings feature of My MergePortal you can:

- change your password, see [“To change your password” on page 37.](#)
- edit security questions, see [“To change your secret question” on page 37.](#)
- select which Visit Summary sections to display, see [“To select visit summary sections” on page 38.](#)
- enable/disable reminder emails, see [“To enable or disable reminder emails” on page 38.](#)



To change your password

1. Navigate to the Settings feature and click the **Change Password** tab. The Change Password tab opens.



SETTINGS

Change Password | User Details | Visit Summary Settings | Reminder Settings

Use the form below to change your password.
New passwords are required to be a minimum of 8 characters in length.

Current password :

New password :

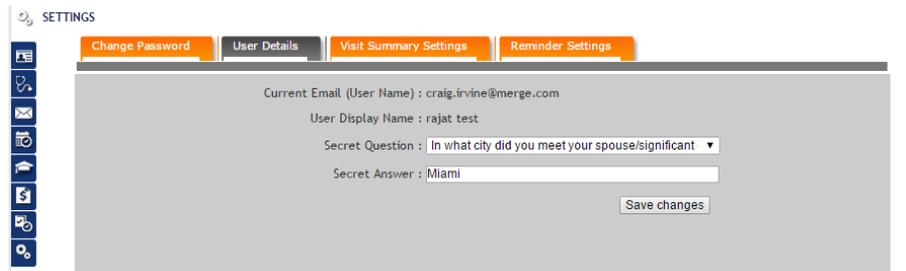
Confirm new password :

Change Password

2. Type your **Current password**. Then type your **New password** and **Confirm new password**.
3. Click **Change Password**. The password change is saved.

To change your secret question

1. Navigate to the Settings feature and click the **User Details** tab. The User Details tab opens.



SETTINGS

Change Password | User Details | Visit Summary Settings | Reminder Settings

Current Email (User Name) : craig.irvine@merge.com

User Display Name : rajat test

Secret Question : In what city did you meet your spouse/significant

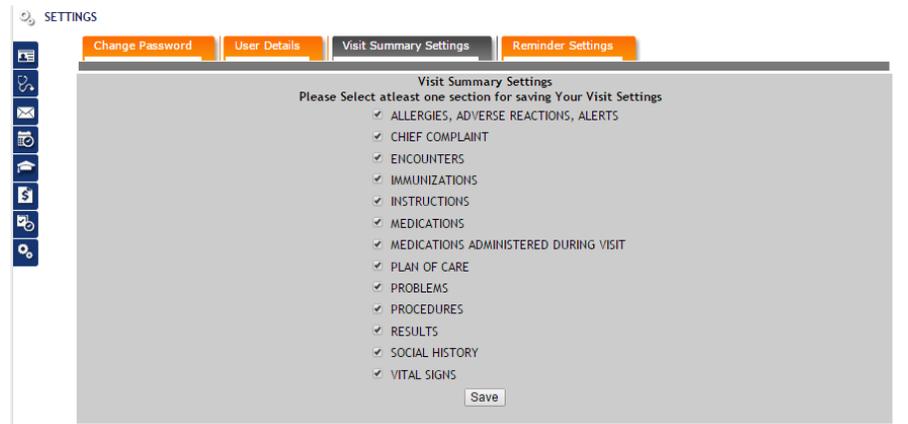
Secret Answer : Miami

Save changes

2. Select a **Secret Question** from the drop-down list.
3. Type the **Secret Answer** to the security question.
4. Click **Save Changes**. The secret question and answer change is saved.

To select visit summary sections

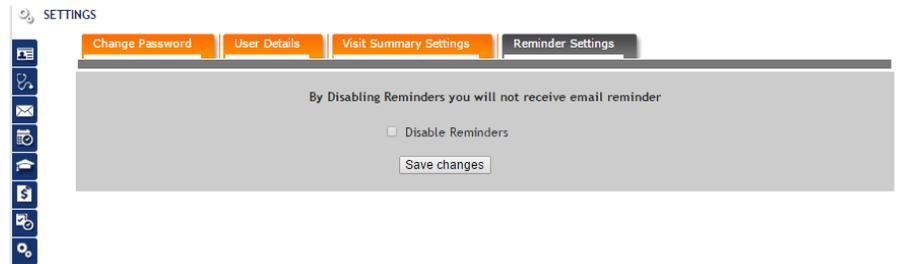
1. You can include or exclude sections of the Visit Summary. Navigate to the Settings feature and click the **Visit Summary Settings** tab. The Visit Summary Settings tab opens.



2. Select or deselect the sections you want to include or exclude in the visit summary.
3. Click **Save**.

To enable or disable reminder emails

1. Navigate to the Settings feature and click the **Reminder Settings** tab. The Reminder Settings tab opens.



2. Select or deselect the **Disable Reminders** option. When selected, **Disable Reminders** prevents reminder emails from being sent to the email address associated to the account.