Connect2Care Patient Portal

User Guide
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1. Patient Log In

Navigate to the Portal Address. The Portal Log in page is displayed.

The user enters their e-mail address in the ‘User Name’ field, their password in the ‘Password’ field and clicks the ‘Log On’ button.

The User Details tab in Settings will be displayed the first time the user logs in to the Patient Portal.

The patient selects a ‘Secret Question’ from the drop down, enters an answer in the ‘Secret Answer’ field and clicks the ‘Save Changes’ button.

The patient is then brought to the home screen if their security answer was saved successfully. If not it will show that there was an error saving.

The next time this patient logs into the Patient Portal, the Home page will be displayed.
2. Patient Portal

2.1 Demographics

The Demographics feature of the Patient Portal allows patients and patient authorized representatives to view/edit the patient information, view/edit/add/activate/inactivate insurance plans, and view exams (and view the report of the exam if it is available).

The Demographics feature can be accessed in three different areas:

- Main ‘Demographics’ icon
- Top menu ‘Demographics’ icon
- Left menu ‘Demographics’ icon.
2.1.2 Patient Information

1. Clicking on Demographics will bring you to the ‘Demographics’ tab:
2. From this screen you can edit/update the patient information that is shown as editable (any white textbox) for yourself (or anyone you are an authorized representative of).

3. Clicking the save button will update the information stored in the Patient Portal as well as the information stored at the practice.

2.1.3 Insurance Plans
1. Clicking on the ‘Plans’ tab will bring you to a screen where you can see the plans associated with your patient (or a patient you are an authorized representative of) account:
2. The ‘Display’ filter allows the user to select between viewing ‘Active’, ‘Inactive’ or all plans associated with this account.

3. Clicking ‘Add’ will pop open a screen where you can add an insurance plan.
4. Clicking the ‘Search’ link will bring up another window to search for insurance carriers.

5. Select one of these plans to use for the plan you are currently adding (for this example we have chosen the top one).
6. Enter the details in the ‘Plan Information’ section (any field with a red asterisk (*) after it is a required field. When you are finished adding all the necessary information for the plan, click save. Or you can click cancel to cancel adding the plan.

7. Clicking on a plan will pop open a screen that will allow you to edit the details of the plan you selected:
8. Edit the details in the ‘Plan Information’ section you wish you update, and click save when you are finished (or cancel if you wish to cancel any changes made).

9. Clicking ‘DeActivate’ will make the respective plan no longer active for the patient’s account.

10. Clicking ‘Activate’ will mark the respective plan as active for the patient’s account.
2.1.4 **Patient Exams**

1. Clicking the ‘Patient Exams’ tab will bring you to a list of exams completed by your practice (as well as any reports that may be associated with those exams)

2. Clicking ‘View Report’ will bring up the patient’s report for that visit (sample report below).
3. To add a new appointment, the Patient can click on ‘New Appointment Request’ as shown below

4. The Add Appointment Request dialog will display
5. The Patient can fill in the required information (Appointment Date, Appointment Time, and Reason)

6. Upon completing the required information, the Patient can click Send Request and the request will be sent to the provider for this new appointment.

7. To send a request for an appointment change, the Patient can click on the Change Appointment Request icon ( ) as shown below. **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 in a Scheduled status.
8. The Change Appointment Request dialog appears

![Change Appointment Request Dialog](image)

9. The Patient can enter the required information (the desired new Appointment Date and Time, and Comments).

10. Upon completing the required information, the Patient can click Send Request and the request will be sent to the provider for this new appointment.

11. To view appointment requests, the Patient can click the “Show Appointment Requests” link

![Show Appointment Requests](image)

12. This will display the Patient’s New/Change Appointment requests, as well as the status of the request (in the Visit Status column) as shown below
13. To hide the Appointment Requests, the Patient clicks the “Hide Appointment Requests”

2.1.5 Medications

1. Clicking on the Medications Tab will show you a list of medications and you will be able to view the Medication Name, Start Date, Quantity, Days Of Supply, Number of Refills, and Electronic Order (Yes/No) as shown below.
2. Clicking ‘Print’ will prompt you with a print preview dialog.

3. Clicking ‘Print’ on this page will then print the document as displayed in the preview.
Patients can add medications by clicking ‘Add’.

The Add Medication dialog appears and the Patient clicks search to search for their medication as shown below.
6. The user then searches for their medication and is able to view the matching medications as shown below.

7. The user then selects their medication and fills out the Add Medication Form. Upon saving, Medication Dialog will close and their medication list will contain the new medication.

8. The patient can click on the medication they wish to edit as shown below.
9. The Patient then enters their changes within the Edit Medication Dialog.

10. The patient can click on the remove link to the right of the medication they wish to remove as shown below.

11. Upon confirming when presented with the ‘Are you sure’ dialog, the medication will be removed and the Medication List will be refreshed. The removed medication will no longer be present.
12. To see refill requests, click the 'Show Refill Requests' button.

13. Refill Requests will now be displayed as shown below:

<table>
<thead>
<tr>
<th>Medication</th>
<th>Provider</th>
<th>Status</th>
<th>Requested Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>acetylsalicylic acid 325 mg</td>
<td>John Smith</td>
<td>Pending Approval</td>
<td>01/01/2023</td>
</tr>
<tr>
<td>acetylsalicylic acid 325 mg</td>
<td>John Smith</td>
<td>Pending Approval</td>
<td>01/01/2023</td>
</tr>
<tr>
<td>ibuprofen 300 mg</td>
<td>Dr. Johnson</td>
<td>Pending Approval</td>
<td>01/01/2023</td>
</tr>
<tr>
<td>ibuprofen 300 mg</td>
<td>Dr. Johnson</td>
<td>Pending Approval</td>
<td>01/01/2023</td>
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</tr>
<tr>
<td>ibuprofen 300 mg</td>
<td>Dr. Johnson</td>
<td>Pending Approval</td>
<td>01/01/2023</td>
</tr>
</tbody>
</table>

14. The Patient can click 'Hide Refill Requests' to hide this list as shown below:

15. To request a refill, the Patient clicks on New Refill Request icon (Rx) for a qualifying medication on the Patient’s Medication List as shown below:
16. The New Refill Request dialog will appear as shown below

17. The Patient can change their set pharmacy by clicking the Change Pharmacy button as shown below
18. The Pharmacy Search dialog will appear and the user can enter the search location information for the pharmacy they are looking for as shown below (Zip code only entered for example)

19. When the user finds the pharmacy they are looking for, they select that pharmacy and the Pharmacy Search dialog will close. The New Refill Request form will show this selected pharmacy

20. The Patient fills out the rest of the New Refill Request form and clicks save

21. The Refill Request is sent to the provider
2.1.6 **Allergies**

1. Clicking the Allergies Tab displays a list of Allergies, Reactions and Allergy Types as shown below.

2. The Patient can then click the print button as shown below.

3. The user is presented with a print preview dialog.

4. The user clicks Print as shown below.
5. The document will be printed as displayed in the preview.

6. To add a drug allergy, the patient can click on the ‘Add’ button as shown below.

7. The Add Allergy dialog appears and the Patient selects drug as their Allergy Type and clicks search to search for their Allergies as shown below.

8. The user then searches for their allergy and is able to view the matching results as shown below.
9. The user then selects their Allergy and fills out the rest of the Add Allergy Dialog.

10. Upon saving, the Add Allergy Dialog will close and their Allergy list will contain the new Allergy's details.

11. To add a drug class allergy, the patient clicks on the Add button as shown below.

12. The Add Allergy dialog appears and the Patient selects Drug Class as their Allergy Type and clicks search to search for their Allergies as shown below.

13. The user then searches for their allergy and is able to view the matching results as shown below.
14. The user then selects their Allergy and fills out the rest of the Add Allergy Dialog.

15. Upon saving, the Add Allergy Dialog will close and their Allergy list will contain the new Allergy's details.

16. To create an ‘other’ allergy, the patient clicks on the add button as shown below.

17. The Add Allergy dialog appears and the Patient selects Other as their Allergy Type and clicks search to search for their Allergies as shown below.
18. The user then searches for their allergy and is able to view the matching results as shown below.

19. The user then selects their Allergy and fills out the rest of the Add Allergy Dialog.

20. Upon saving, the Add Allergy Dialog will close and their Allergy list will contain the new Allergy’s details.

21. To edit an allergy, the patient clicks on the Allergy they wish to edit as shown below.

22. The Patient then enters their changes within the Edit Allergy Dialog.
23. Upon saving, the dialog closes and the Allergy Details are updated within the List.

24. To remove an allergy, the patient clicks on the remove link to the right of the Allergy they wish to remove as shown below.

25. Upon confirming when presented with the “Are you sure” dialog, the Allergy will be removed and the Allergy List will be refreshed.

2.1.7 Conditions

1. Clicking on the Conditions Tab allows you to view the Condition and Diagnosed Date as shown below.
2. Clicking print will present you with a print preview dialog.

3. Clicking Print from the print preview dialog as shown below will print the document as displayed in the preview.
4. To add a condition, the patient clicks on the add button as shown below.

5. The Add Condition dialog will appear and the patient can click ‘Search’ to search for their condition as shown below.
6. The user then searches for their condition and is able to view the matching results as shown below.

7. The user then selects their Condition and fills out the Add Condition Form.

8. Upon saving, the Add Condition Dialog will close and their Condition list will contain the new Condition’s details.

9. To remove a condition, the patient then clicks on the remove icon to the right of the Condition they wish to remove as shown below.
10. Upon confirming when presented with the ‘Are you sure’ dialog, the Condition will be removed and the Condition List will be refreshed.

2.1.8 Health History

1. Clicking the Health History Tab allows you to view the History Code, Description and Relationship Status for you and family members as shown below. The page will default to the patient tab.

2. Selects the Family Tab allows you to view the History Code, Description, and Relationship of family member as shown below.
3. To print, the Patient can click the print button as shown below.

4. The user will be presented with a print preview dialog, which shows both Patient and Family History.

5. The user can click ‘Print’ as shown below and the document will be printed as shown in the preview.
6. To add Health History, you can click the Add button as shown below.

7. The Add Health History dialog appears and if the Patient wants to add one Health History Item, the Patient can click the search button as shown below.
8. The user can search for the history and is able to view the matching results as shown below.

9. The user can select the History they wish to add to their Health History and fill out the Add Health History Form.

10. If the Patient wants to add multiple Health History Items, the Patient clicks ‘Add Multiple’ as shown below.
11. The Add Health History dialog will pop up for selecting multiple items as shown below

12. The user checks the check box next to each desired item to add

13. When the user is done selecting, they click Save as shown below
14. Upon saving, the Add Health History dialog will close and the Patient Health History list will contain the new History chosen with details.

15. To add health history for a family member, click on the Family tab and click the Add button as shown below.

16. The Add Health History dialog will appear and if the Patient is interested in adding a single item, they can click search for the History to add as shown below.

17. The user will be able to view the matching results as shown below.
18. The user then selects the History they wish to add to their Health History and fills out the Add Health History Form, including selecting the Relationship field as shown below.

19. If the Patient wants to add multiple Family Health History Items, the Patient clicks Add Multiple as shown below.
20. The Add Health History dialog will pop up for selecting multiple items as shown below.

21. The user checks the check box next to each desired item to add and selects a Relationship.

22. When the user is done selecting, they click Save as shown below.
23. Upon saving, the Add Health History dialog will close and the Family Health History list will contain the new History chosen with details.

24. To remove a Health History item for the patient, they can click on the Patient tab and then click the Remove icon for the respective item they wish to remove, as shown below.

25. Upon confirming when presented with the ‘Are you sure’ dialog, the Health History item will be removed and the Patient Health History List will be refreshed.

26. To remove a Health History item for a family member, the patient can click on the Family tab and then click the Remove icon for the respective item they wish to remove, as shown below.
27. Upon confirming when presented with the ‘Are you sure’ dialog, the Health History item will be removed and the Family Health History List will be refreshed.

2.1.9 **Forms**

1. Clicking on the Forms tab displays a list of forms.

2. The Patient clicks Download for the form they wish to download as shown below

3. The patient will select the file location where the form file is saved

4. The patient can navigate to this location and open the downloaded form

5. To upload a form, the Patient clicks on Upload Form as shown below

6. An Upload Form dialog will appear. This is where the user can select the form they have filled out and wish to upload.
7. The user fills out the required information, and any other information on the form after choosing the file.

8. The user clicks ‘Upload’. A confirmation will appear upon successful upload, and the Upload Form dialog will close.

2.2 Summary

The Summary feature of the Patient Portal allows patients and patient authorized representatives to view, download, transmit and print Patient and Visit Summaries.

The Summary feature can be accessed in three different areas:

- Main ‘Summary’ icon
- Top menu ‘Summary’ icon
- Left menu ‘Summary’ icon.
2.2.2 **Patient Summary**

Patients can view their Patient summary by following the below steps:

1. Click the ‘Summary’ Icon from the Home page.
2. Next, click the ‘Patient Summary’ tab. The Patient’s Summary will be displayed.
3. Clicking a category in the ‘Table of Contents’ area will cause the Patient Summary to jump to display that section.

At this point the patient can choose to download, print or transmit their Patient Summary. The details of which are displayed below:
4. To download the summary, click on the ‘Download’ button. The Password window will be displayed.

5. Enter a password into both password fields and click the ‘Download’ button.
6. A ZIP file will be created containing three files: CCD XML document, CCD XSL Stylesheet and a TXT file.
7. This file can be unzipped using ‘7 zip’. The user will be prompted to enter the password specified during download to unzip the files.
8. To print, click on the ‘Print’ button. The Print preview and set up options will be displayed.
9. The user can select their printer settings and print the Patient Summary.
10. To transmit, click on the ‘Transmit’ button. The Transmit Your Health Record window will be displayed.

11. Select the appropriate recipient from the ‘To’ field drop-down list.
12. Clicking the ‘View’ link will display a preview of the Patient Summary that will be sent to the recipient selected in the ‘To’ field.
13. Enter a message in the ‘Message’ field and click the ‘Send’ button. The Patient Summary will be transmitted to the selected recipient.
14. A message will be displayed letting the patient know that the Patient Summary has been sent successfully.

2.2.3 Visit Summary

1. Clicking the ‘Visit Summary’ Tab will display a list of the patient’s visits.

<table>
<thead>
<tr>
<th>Visit Date</th>
<th>Provider Name</th>
<th>Location</th>
<th>Visit Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/28/2013 01:30 PM</td>
<td>JOHN DOE</td>
<td>DAYTONA BEACH</td>
<td>Annual Exam</td>
</tr>
<tr>
<td>01/31/2013 04:00 PM</td>
<td>JOHN DOE</td>
<td>DAYTONA BEACH</td>
<td>Annual Exam</td>
</tr>
<tr>
<td>12/10/2012 05:00 PM</td>
<td>JOHN DOE</td>
<td>DAYTONA BEACH</td>
<td>Annual Exam</td>
</tr>
<tr>
<td>12/10/2012 05:00 PM</td>
<td>JOHN DOE</td>
<td>DAYTONA BEACH</td>
<td>Annual Exam</td>
</tr>
</tbody>
</table>

2. Select one of the Visit Summaries to view. The selected Visit Summary will be displayed.

Visit Summary Settings

Patients can choose to include or exclude portions of the Visit Summary to view, download or transmit.

3. Click the ‘here’ link located just above the Visit Summary. The Visit Summary Settings page will be displayed.
4. Check or uncheck the sections of the visit summary that should be displayed and click the ‘Save’ button.
5. Next, navigate back to the Visit Summary and view the results. The sections that were unchecked will now show with no data displayed.

At this point the patient can choose to download, print or transmit their Visit Summary. The details of which are displayed below:

6. Click the ‘Download’ button. The Password window will be displayed.

7. Enter a password into both password fields and click the ‘Download’ button.

8. A ZIP file will be created containing three files: CCD XML document, CCD XSL Stylesheet and a TXT file.

9. This file can be unzipped using ‘7 zip’. The user will be prompted to enter the password specified during download to unzip the files.

10. Click the ‘Print’ button. The Print preview and set up options will be displayed.
11. The user can select their printer settings and print the Visit Summary.

12. Click the ‘Transmit’ button. The Transmit Your Health Record window will be displayed.

13. Select the appropriate recipient from the ‘To’ field drop-down list.

14. Clicking the ‘View’ link will display a preview of the Visit Summary that will be sent to the recipient selected in the ‘To’ field.

15. Enter a message in the ‘Message’ field and click the ‘Send’ button. The Visit Summary will be transmitted to the selected recipient.

16. A message will be displayed letting the patient know that the Visit Summary has been sent successfully.

2.3 My Messages

The My Messages feature of the Patient Portal allows patients and patient authorized representatives to send and receive emails from and to Patient Portal Staff Users.

The My Messages feature can be accessed in three different areas:

- Main ‘My Messages’ icon
- Top menu ‘My Messages’ icon
- Left menu ‘My Messages’ icon
The below steps detail the My Messages feature:

1. Navigate to the My Messages feature. The My Messages page is displayed containing a list of messages sent to the patient from Staff users. Unread emails will be bold.

2. Click a message line item to view the message. Three action buttons are displayed on the Message Details window, ‘Reply’, ‘Archive’ and ‘Close’.
3. Click the ‘Reply’ button to send a message back to the Staff user that sent the message.

4. Click the ‘Archive’ button to remove the message from the Inbox.

5. Click the ‘Close’ button to close the Message Details screen and display the My Messages screen.

6. Click the ‘Sent Messages’ link on the My Messages page to view sent messages.

7. To create a new message, click the ‘Create’ link at the bottom of the My Messages screen. The Create Message window is displayed.
8. Select a staff user from the ‘To’ field drop-down list.
9. Enter a subject in the ‘Subject’ field.
10. Type a message in the Message field and click the ‘Send’ button to send the message. The message will be sent to the specified Staff user.
11. You can look at archived messages by clicking on the ‘Archive Messages’ link.
12. A list of archived messages will be available to view. A user can click on a message to view message details.
2.4 Reminders

The Reminders feature of the Patient Portal allows patients to view a list of health reminders.

The Reminders feature can be accessed in three different areas:

- Main ‘Reminders’ icon
- Top menu ‘Reminders’ icon
- Left menu ‘Reminders’ icon

1. To view reminders, click on any ‘Reminders’ icon. The user will be presented with the Health Reminders screen as shown below.
2. The user can change Reminder settings by clicking on the ‘Settings’ feature.

3. The user then clicks on the ‘Reminder Settings’ tab.

4. The user can check the checkbox to disable the Reminder e-mails from being sent to the e-mail address associated with their account. Leaving this unchecked will allow the reminders to be sent.

2.5 Education Documents

The Education Documents feature of the Patient Portal allows patients to view documents that could be informative in the categories of Exams, Medications, Conditions and Lab.

The Education Documents feature can be accessed in three different areas:
1. Clicking on the Education Docs icon bring the user to the Education Docs page which defaults to the Exam tab.

2. Clicking on the Exam tab allows the user to view each of the education documents pertaining to their past exams. This includes the Document Name, Document Title, a link to the doc source and the date the document was provided to the patient.

3. The patient can click the link in the course column to view the document as shown below.
4. Clicking the link will cause a new browser tab to appear containing the document as shown below.

5. Clicking the Medication tab allows the patient to view each of the education documents pertaining to their past medications. This includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient.

6. The patient can then click the link in the source column to view the document in a new browser tab.

7. Clicking the Conditions tab allows the patient to view each of the education documents pertaining to their past conditions. This includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient.

8. The patient can then click the link in the source column to view the document in a new browser tab.

9. Clicking the Lab tab allows the patient to view each of the education documents pertaining to their past lab procedures. This includes the Document Name, Document Title, a link to the doc source and the date the document was provided for the patient.

10. The patient can then click the link in the source column to view the document in a new browser tab.
2.6 Bill Pay

The Bill Pay feature of the Patient Portal allows patients to make payments and view payment history.

The Bill Pay feature can be accessed in three different areas:

- Main ‘Bill Pay’ icon
- Top menu ‘Bill Pay’ icon
- Left menu ‘Bill Pay’ icon

1. Clicking on the Bill Pay icon will bring the user to the Bill Pay screen. The user can enter payment information and click Make Payment as shown below. Note the Billing Information is automatically populated with the information associated with the Patient’s information.
2. The user can also view their Payment History and Payments’ status at the bottom of the Bill Pay screen as shown below.

2.7 Audit Trail

The Audit Trail feature of the Patient Portal allows patients to view a report of all of the Patient Portal actions they have taken during a desired date range.

The Audit Trail feature can be accessed in three different areas:

Main ‘Audit Trail’ icon
Top menu ‘Audit Trail’ icon
Left menu ‘Audit Trail’ icon
Follow the below steps to view the Audit Log:

1. Navigate to the Audit Trail using one of the three navigation icons. The Audit Trail is displayed. The From and To dates are defaulted to the current date.
2. To view actions taken in a different date range, click on the ‘From Date’ field and select the date from the calendar that is the start date of the audit actions.

3. Next choose the end date of the audit actions by selecting the ‘To Date’.

4. Click the ‘Search’ button to view the audit trail for those dates.

5. The Audit Trail can be printed by clicking the ‘Print’ button.

Note: The ‘User Name’ field indicates the username of the person who took the action. The ‘Patient Name’ field will indicate the patient related to the action that was taken. This will only be different if a patient authorized representative took action in the portal on behalf of a patient.

2.8 Settings

The Settings feature of the Patient Portal allows patients to change their password, edit security questions and set Visit Summary Settings.

The Settings feature can be accessed in three different areas:

- Main ‘Settings’ icon
- Top menu ‘Settings’ icon
- Left menu ‘Settings’ icon
2.8.2 **Change Password**

The below steps detail how a patient user can change their password:

1. Navigate to the Settings area of the Patient Portal. The Settings page will be displayed containing three tabs: ‘Change Password’, ‘User Details’ and ‘Visit Summary Settings’.
2. Click the ‘Change Password’ tab. The Change Password screen is displayed.

3. Enter the current password in the ‘Current Password’ field.

4. Enter a new password in both the ‘New password’ and ‘Confirm new password’ field.

5. Click the ‘Change Password’ button. A message will display letting the user know that the password was changed successfully.
### 2.8.3 User Details

The following details the steps to change user settings:

1. Navigate to the Settings screen and click the ‘User Details’ tab. The User Details screen is displayed.

2. Select a question from the ‘Secret Question’ drop down.

3. Enter an answer in the ‘Secret Answer’ field and click the ‘Save changes’ button. A message will be displayed letting the user know that the changes have been saved.

### 2.8.4 Visit Summary Settings

The following details the steps to change Visit Summary Settings:

1. Navigate to the Settings area and click the ‘Visit Summary Settings’ tab. The Visit Summary Settings are displayed.
2. Check or uncheck the sections of the visit summary that should be displayed and click the ‘Save’ button. A message will be displayed letting the user know that the changes were saved successfully.

2.8.5 Reminder Setting

The following details the steps to change user settings:

1. Navigate to the Settings area and click the ‘Reminder Settings’ tab. The Reminder Settings are displayed.
2. The user can check the checkbox to disable the Reminder e-mails from being sent to the e-mail address associated with their account. Leaving this unchecked will allow the reminders to be sent.