

Patient Portal – Patient Access 2015 Edition CEHRT Promoting Interoperability



Promoting Interoperability (Meaningful Use) Stage 3 Related Objective:

- **Objective 5:** Patient Electronic Access
- **Measure 1:** For more than 80 percent of all unique patients seen by the EP:
 - (1) The patient (or the patient-authorized representative) is provided timely access to view online, download, and transmit his or her health information; and
 - (2) The provider ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the Application Programming Interface (API) in the provider's CEHRT

Promoting Interoperability (Advancing Care Information) Related Objective:

- **Objective:** Patient Electronic Access: Provide Patient Access
- **Measure:** For at least one unique patient seen by the MIPS eligible clinician:
 - (1) The patient (or the patient-authorized representative) is provided timely access to view online, download, and transmit his or her health information; and
 - (2) The MIPS eligible clinician ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the Application Programming Interface (API) in the MIPS eligible clinician's CEHRT.

In order for a patient (or the patient's authorized representative) to receive an invitation email to access the portal, the patient's email address must be entered on the patient's account within the Person Profile prior to the visit being created. **Pathway:** Thrive UX > System Menu > Profile Listing > Select Patient > Enter Email.

The screenshot shows the 'Accounts Receivable - Person Profile' form in the Thrive UX system. The patient's name is SMITH ELLA KATHERINE. The email field is highlighted with a green circle. Below the form is a 'Visit Listing' table.

Visit#	From Date	Thru Date	Service	Balance	Bad Debt
C00570	03/22/2017		EMPLOYEE	.00	.00
C00572	03/29/2017		CLINIC	3.00	.00

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The patient may choose to allow an authorized representative access to the specific visit as well. The authorized representative can be linked to the visit when the visit is being created. **Pathway:** Thrive UX > System Menu > Profile Listing > Select Patient > Create New Visit > Select lookup for Patient Portal Authorized Rep

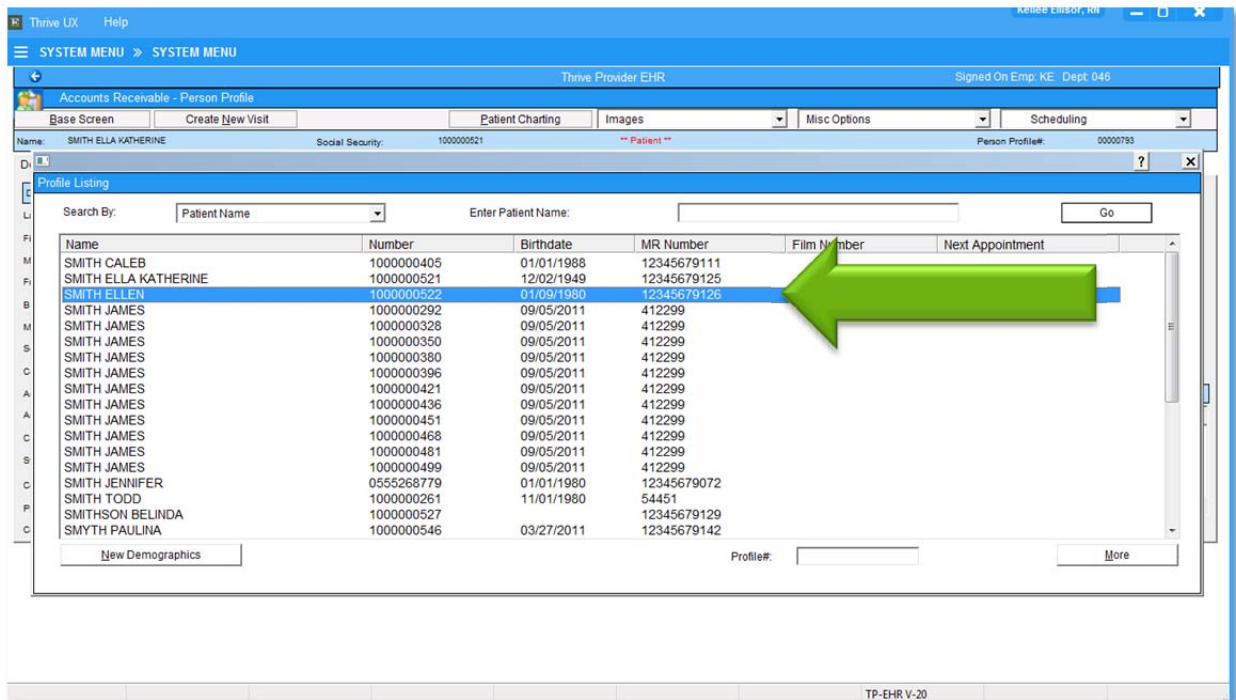
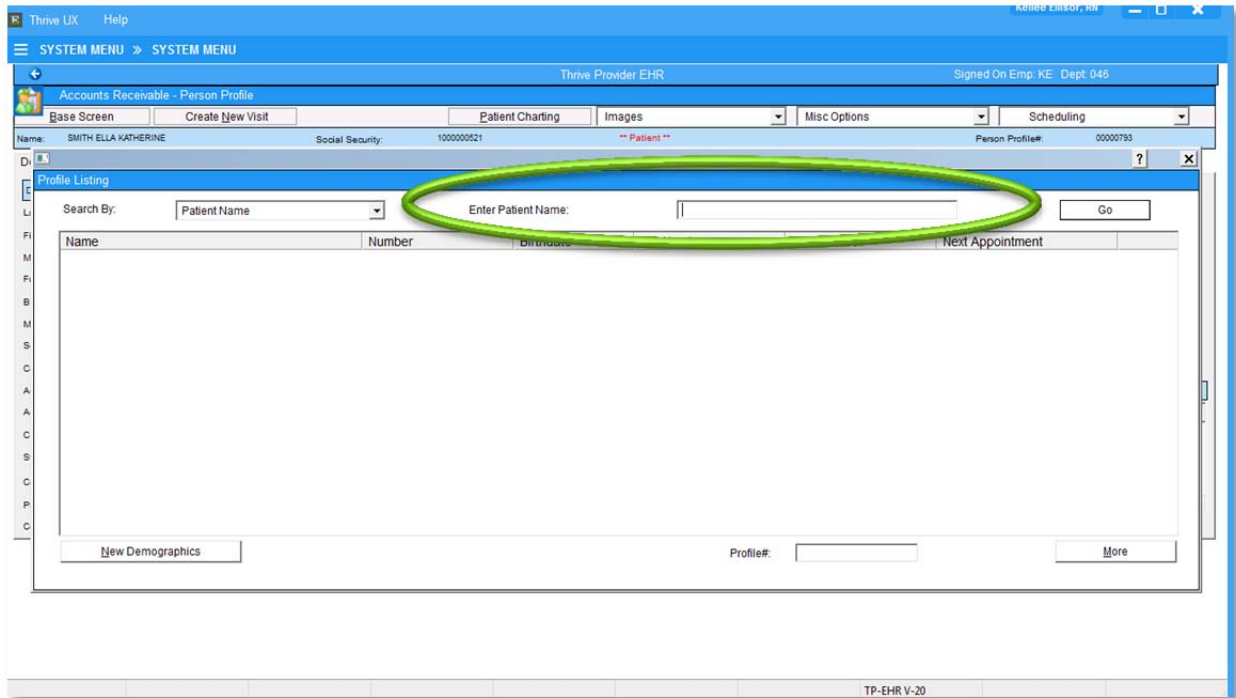
The screenshot shows the 'Create New Visit' form in the Thrive UX software. The form is titled 'Accounts Receivable - Person Profile' and includes a 'Visit Information' tab. The 'Patient Portal Authorized Rep.' field is highlighted with a green circle. The form also includes fields for 'Physician', 'Service Code', 'Guarantor', and 'Restrict Payer Disclosure'. A table at the bottom of the form allows for selecting insurance coverage for the visit.

Select	Code	Insurance Name	Primary
<input type="checkbox"/>			

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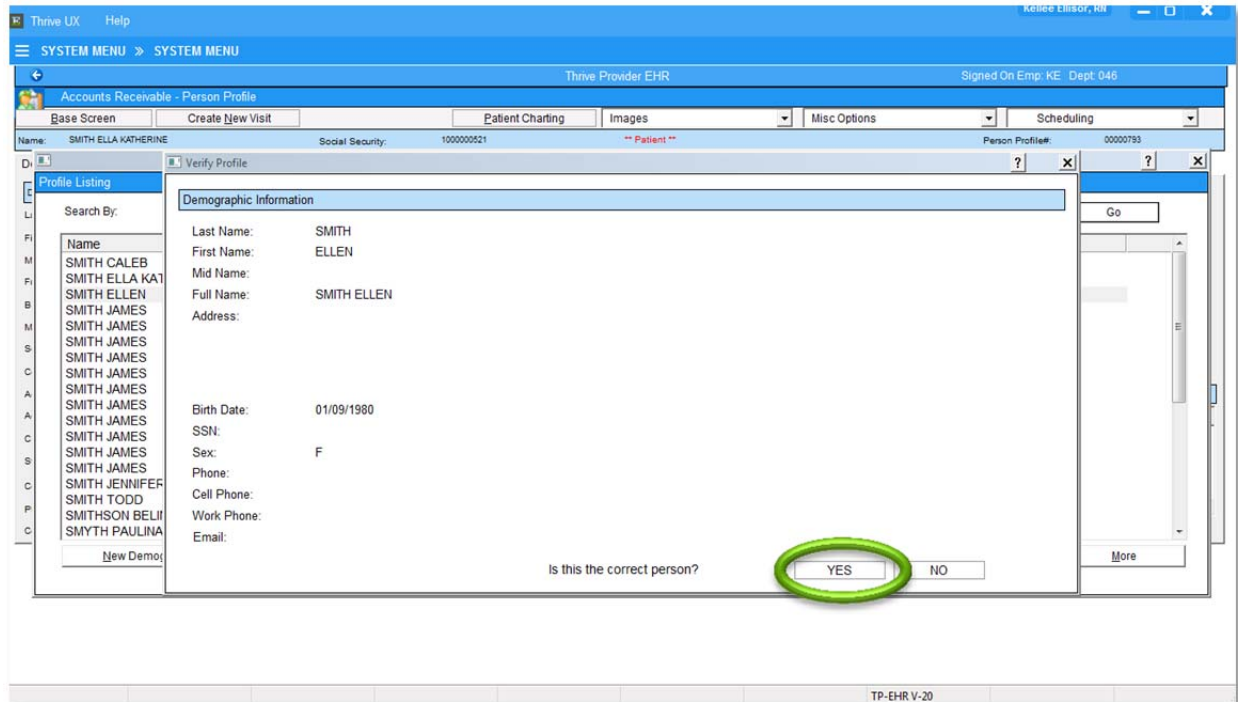
Search for and select the Authorized Representative's Profile.



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Verify that this is the correct patient and select **Yes**.



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Verify the authorized representative's email is entered and then select the back arrow.

Thrive UX Help Kellie Ellison, RN

SYSTEM MENU > SYSTEM MENU

Thrive Provider EHR Signed On Emp: KE Dept 046

Accounts Receivable - Person Profile Images

Name: SMITH ELLEN Social Security: 1000000522 ****Authorized Rep**** Person Profile#: 00000794

Demographics | Contact/Billing Info | Clinical Info

Date Created: 03/29/2017

Demographic Information

Email: ellensmith@evident.com

Last Name: SMITH Birth Place: [Field]

First Name: ELLEN Language: [Field]

Mid Name: [Field] Expired Date: [Field]

Full Name: SMITH ELLEN Maiden Name: [Field] Confidential: [Field]

Birth Date: 01/09/1980 37 YEARS Religion: [Field] Marital: [Field]

MedRec #: 12345679126 New Church: [Field] Smokeless Tobacco: [Field]

Sex: F Female Race: W WHITE Smoker: [Field]

Country: US USA Ethnicity: N Not Hispanic or Latino Smoke SID: [Field]

Address1: [Field] Military: [Field] Smoke EndDt: [Field]

Address2: [Field]

City: [Field]

State/Zip: [Field]

County: [Field]

Phone: [Field]

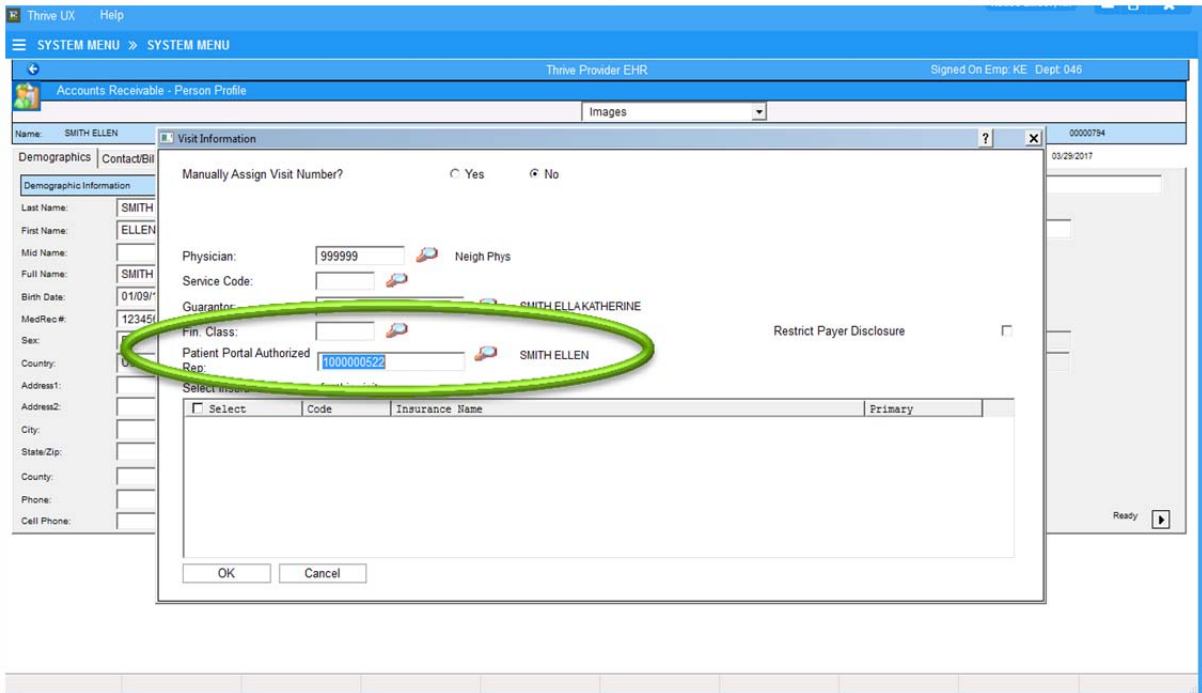
Cell Phone: [Field]

Ready [Next Arrow]

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The authorized representative is now listed.

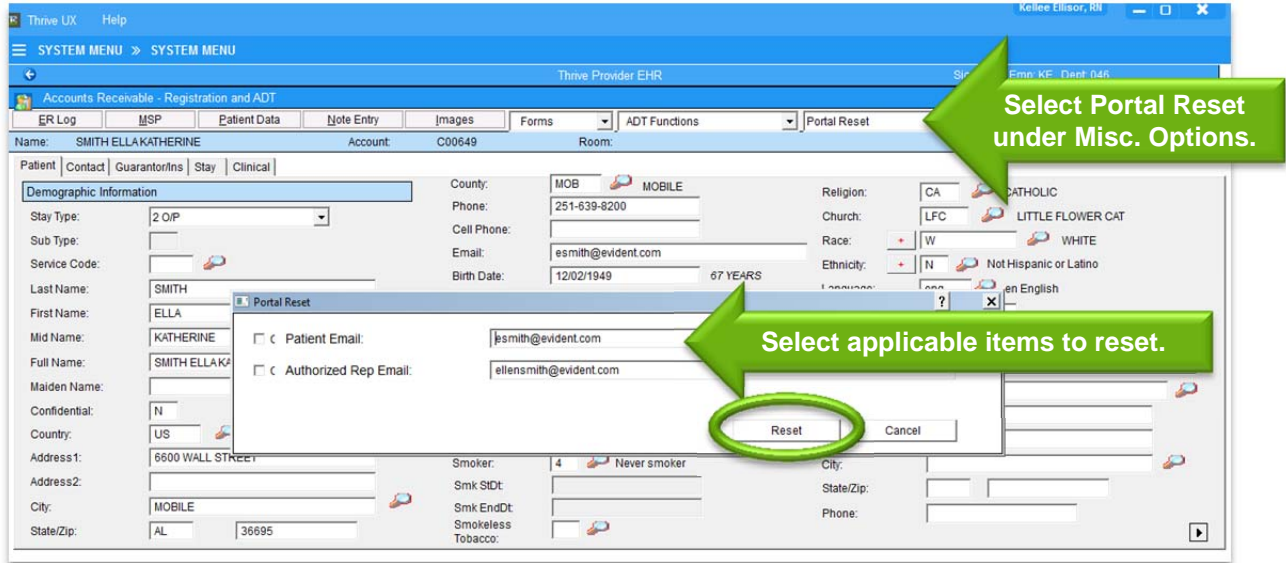


Once the patient's visit is discharged, the patient and/or the authorized representative will be sent an introductory email to create a login name and user password for the Patient Portal.

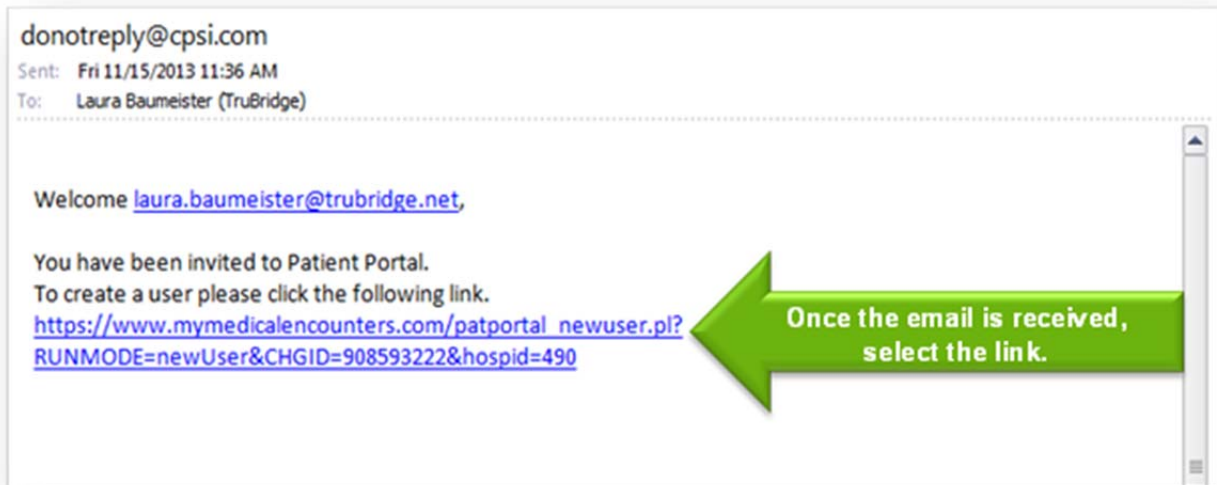
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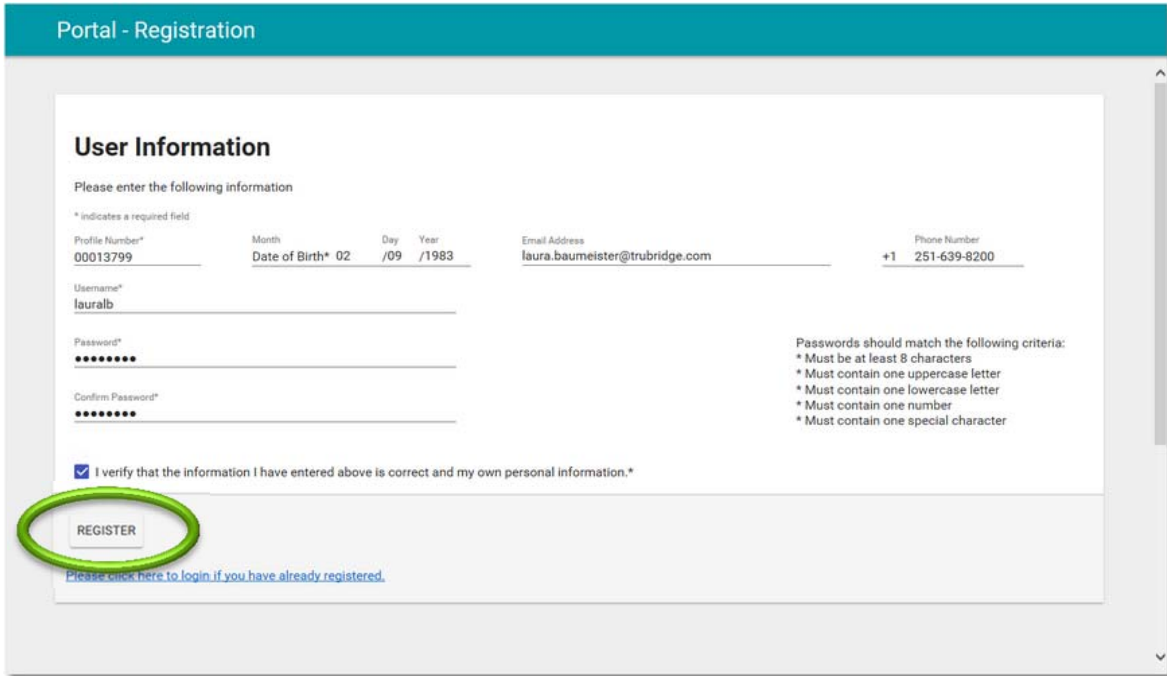
If the patient or authorized representative did not receive an email invite, then a “Portal Reset” can be performed to send a new email. Pathway: **Thrive UX > System Menu > Enter Account Number > Census > Select Portal Reset from the Misc. Options dropdown > Select to reset the patient email and/or the authorized rep email > Reset**



The invitation email will include a link to register for Thrive Patient Portal access.



Enter the Date of Birth, Email Address and Phone Number. The Profile Number will pull from the link. Next, create a Username and Password. Select the checkbox to verify the information is correct and then select Register.



Portal - Registration

User Information

Please enter the following information

* indicates a required field

Profile Number*	Month	Day	Year	Email Address	Phone Number
00013799	Date of Birth* 02	/09	/1983	laura.baumeister@trubridge.com	+1 251-639-8200

Username*
lauralb

Password*
●●●●●●

Confirm Password*
●●●●●●

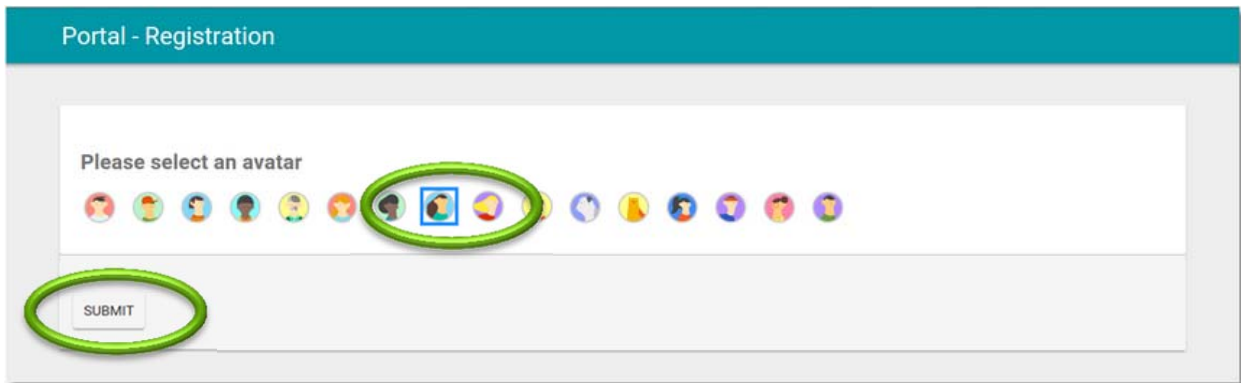
Passwords should match the following criteria:
* Must be at least 8 characters
* Must contain one uppercase letter
* Must contain one lowercase letter
* Must contain one number
* Must contain one special character

I verify that the information I have entered above is correct and my own personal information.*

REGISTER

[Please click here to login if you have already registered.](#)

Next, the user will select an avatar and submit.



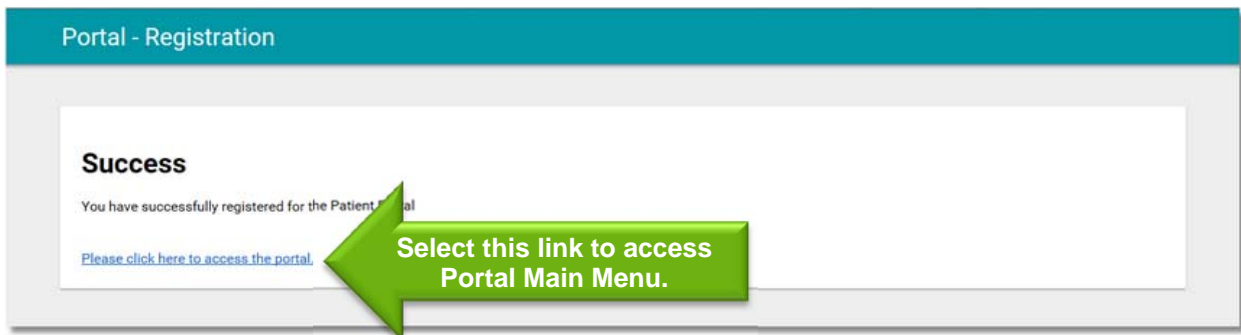
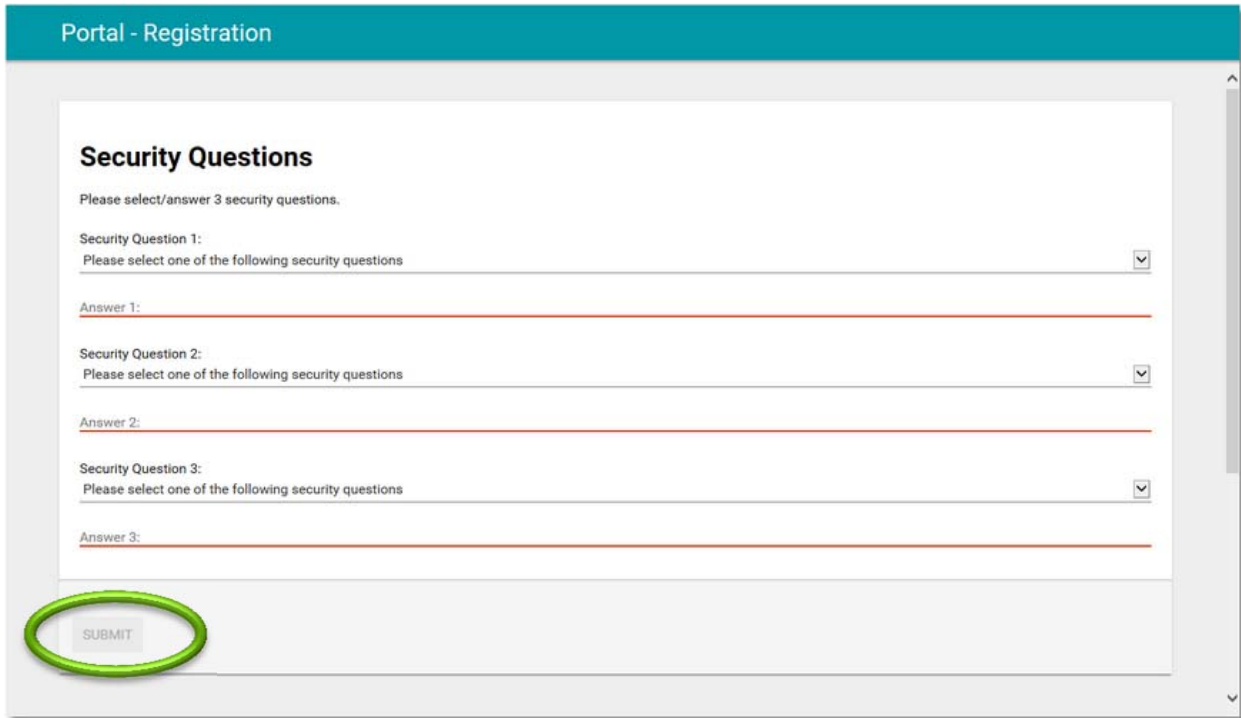
Portal - Registration

Please select an avatar

● ● ● ● ● ● ● ● ● ● ● ●

SUBMIT

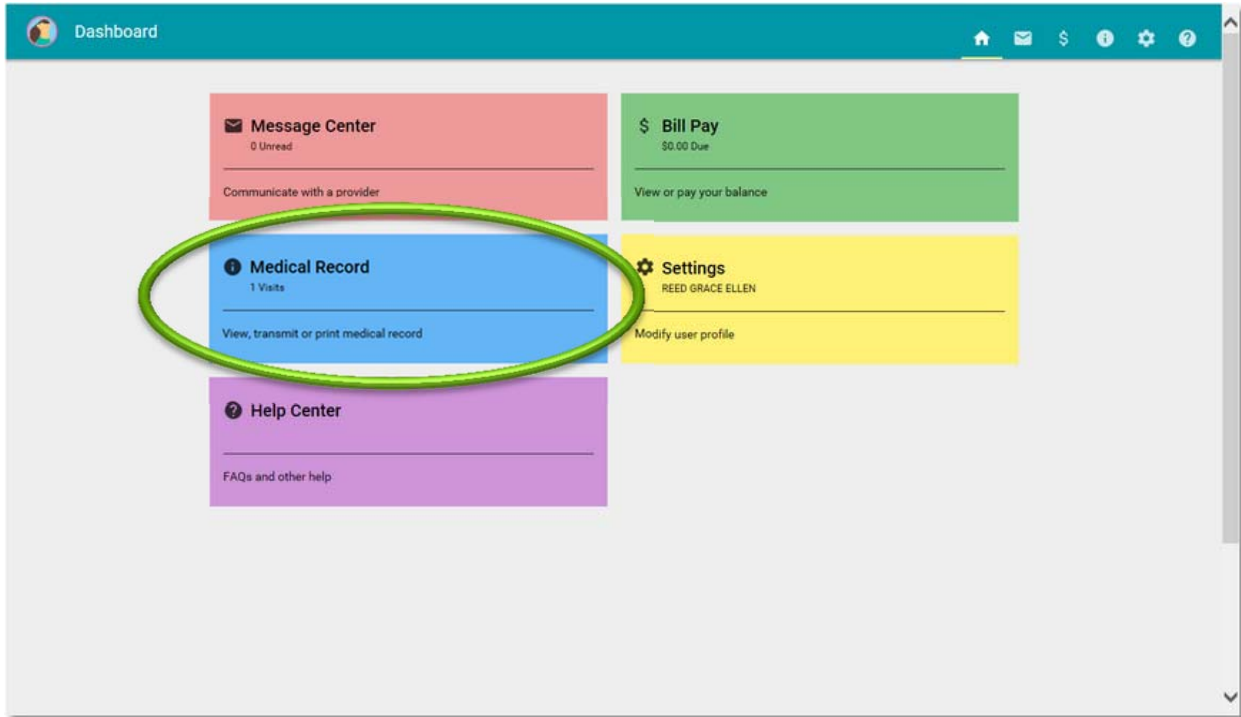
Next, select three security questions and provide the answers. These are needed in case the password is forgotten. Once all questions and answers are entered, select Submit.



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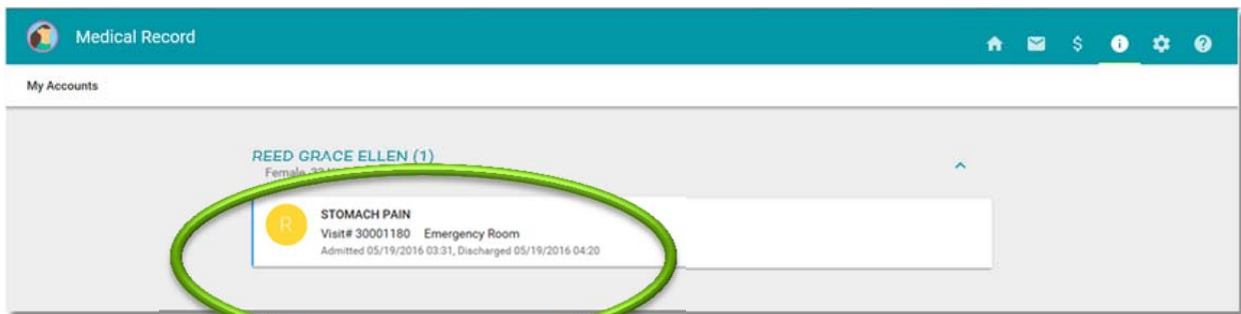


Once the patient or the authorized representative has created a username and password, they will now be able to access their health information on Thrive Patient Portal. To access their health information, the patient will log in and select Medical Record.



Next the patient will select the visit they want to view. If an authorized representative is the authorized representative for multiple patients, the user will first need to select the patient they want to view and then select a visit.

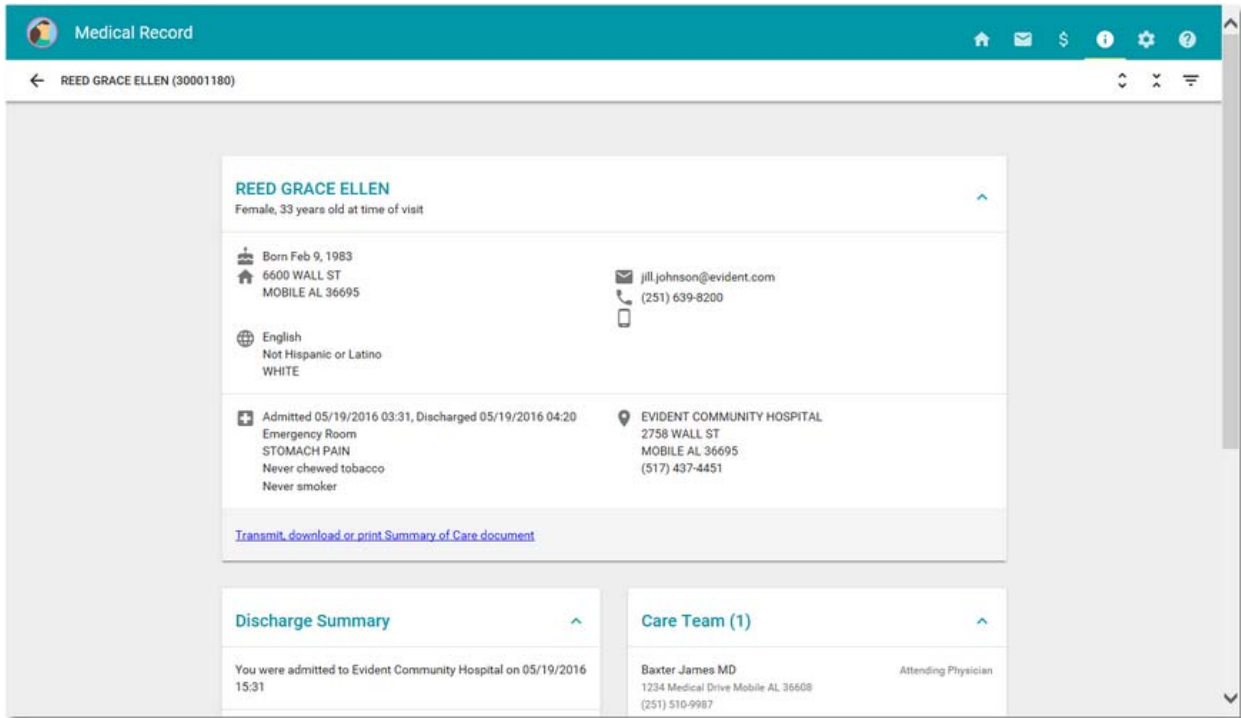
NOTE: If “Exclude from Portal” is checked on the patient account, that visit will not display on the portal.



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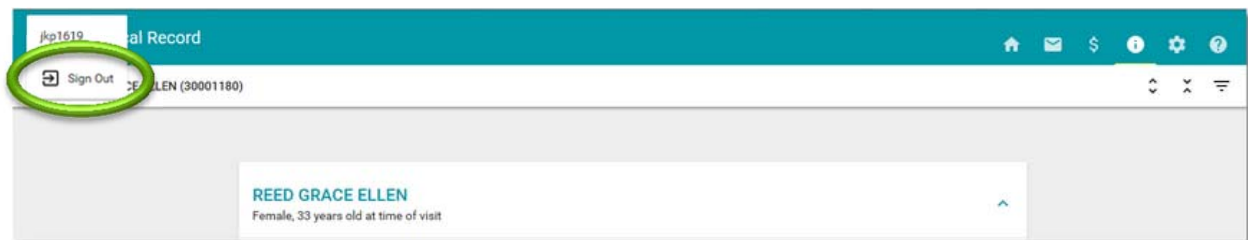
When a visit is select, the user will be able to view the patient summary for that visit. The user can scroll down to view information in each category.



To view another visit summary, select the back arrow to return to the visit selection screen.

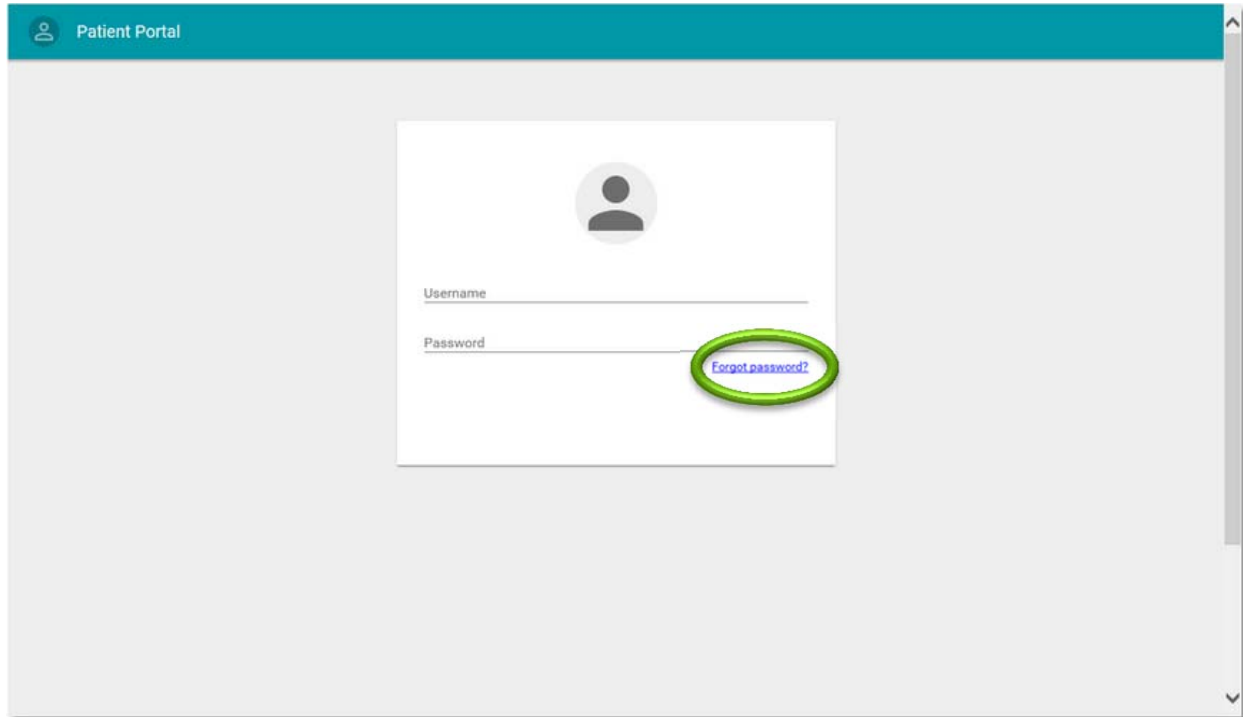


When done, the user will select the avatar and then select Sign Out.

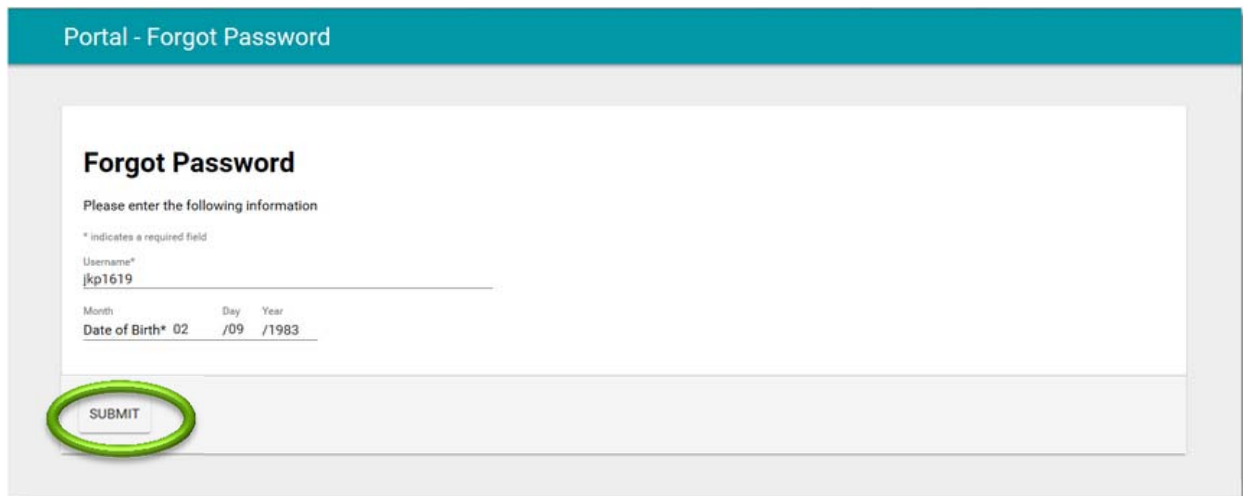


To access the patient portal at a later time, the patient or authorized representative can go to <https://thrivepatientportal.com>.

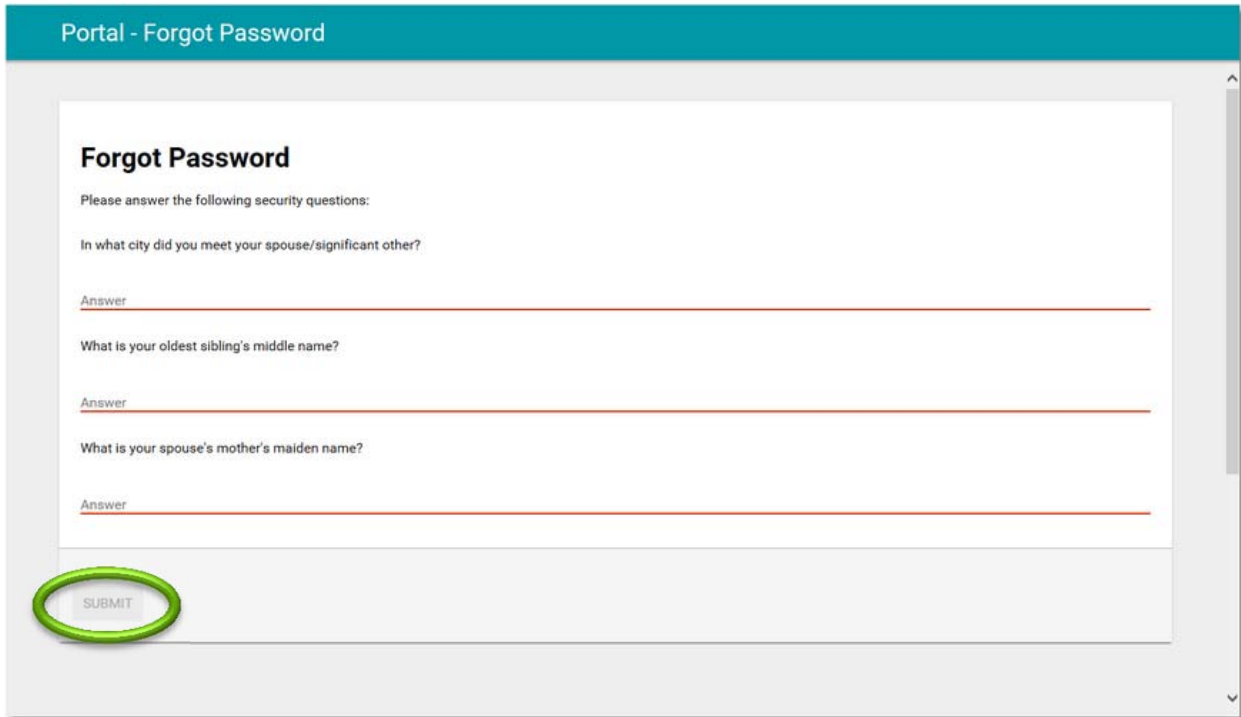
If a user forgets his or her password, it can be reset by selecting [Forgot Password](#).



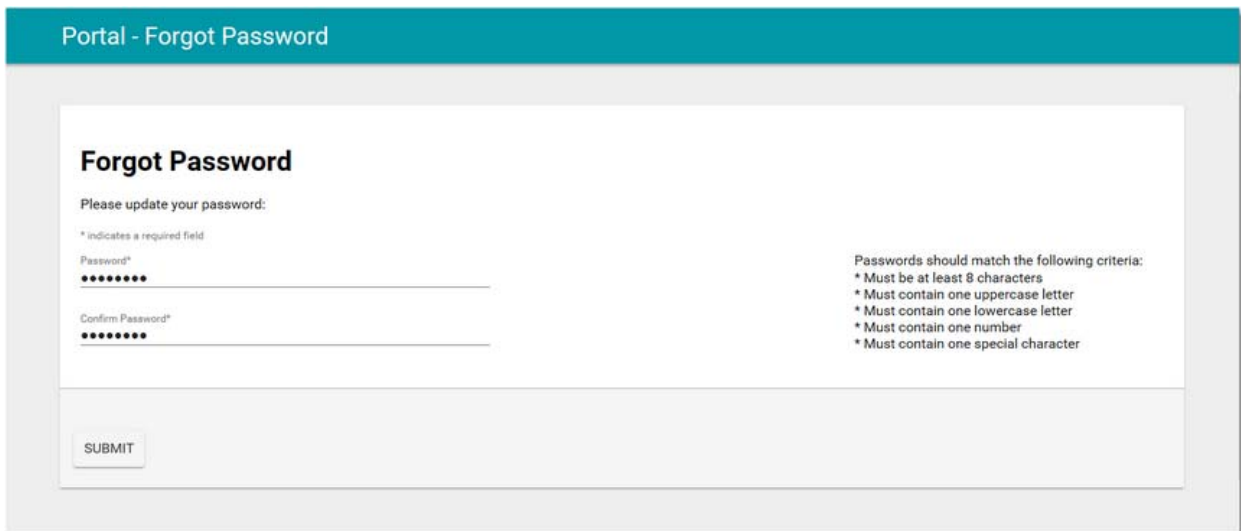
The user will be prompted to enter his or her Username and Date of Birth. Once entered, select [Submit](#).



Next, the user will be prompted to answer the security questions that were set up when the user registered their portal account. Once all questions are answered, the user will select Submit.



Next, the user will create and confirm a new password and select Submit.





Attestation Disclaimer:

Promoting Interoperability attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. Evident and TruBridge Promoting Interoperability certified products, recommended processes and supporting documentation are based on Evident's interpretation of the Promoting Interoperability regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, Evident and TruBridge bear no responsibility for attestation information submitted by the client.