Introduction

The FollowMyHealth™ Patient Portal provides a patient with timely access to their electronic medical record.
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# Table of Contents

- **Settings** .................................................................................................................. 4
  - Communication Preferences .................................................................................. 4
  - Account Access ........................................................................................................ 5
  - Deleted Items .......................................................................................................... 6
  - Deactivate Account ............................................................................................... 6
  - Add Authentication Methods .................................................................................. 6

- **Support** .................................................................................................................... 7

- **Home Screen** .......................................................................................................... 8
  - Healthcare Apps ...................................................................................................... 8

- **Messages** ................................................................................................................ 10

- **My Health** ............................................................................................................... 11
  - Summary .................................................................................................................. 11
  - Conditions ............................................................................................................... 11
  - Medications ............................................................................................................. 12
  - Allergies .................................................................................................................. 12
  - Immunizations ........................................................................................................ 13
  - Procedures ............................................................................................................... 13
  - Results ...................................................................................................................... 14
  - Vitals ......................................................................................................................... 14
  - Social History .......................................................................................................... 15
  - Documents .............................................................................................................. 15
  - Chart View ................................................................................................................ 16
  - Search View ............................................................................................................. 16
  - Patient Banner Icons ............................................................................................. 17

- **My Doctors** ............................................................................................................ 18

- **Appointments** ........................................................................................................ 20

- **Billing** ..................................................................................................................... 21

- **My Info** ................................................................................................................... 22
  - General ..................................................................................................................... 22
  - Emergency Contact .................................................................................................. 24
**Settings**
The ‘Settings’ hyperlink allows you to manage your account.

**Communication Preferences**
The ‘Change Communication Preference’ hyperlink allows you to choose how you would like to be notified when important changes are made to your health record and appointment list.

- Please note you must enter your cell phone number in the ‘My Info’ tab for your cell phone number to appear in this ‘Communication Preferences’ window. This is needed to set the SMS communication preferences.

- Once you have entered your cell phone number in the ‘Edit Demographics’ window, it will display in the ‘Communication Preferences’ window.
  - Click the ‘Cell Phone Carrier’ dropdown to select your cell phone carrier.
  - Once you have selected your carrier, click the ‘Validate Cell Phone’ button.
    - You will then receive a text message with your validation code.
      - Enter the 4-digit code into the ‘Validate Cell Phone’ window.
  - You are now able to select the text messaging options.
    - By checking a text message box, you will be prompted to agree to a ‘Release of Information Disclaimer’.
**Account Access**

The ‘Change Account Access’ hyperlink allows you to manage who can access your account, and view which accounts you have access to.

- Enter in the email address of the individual you would like to grant proxy access.
- You can grant ‘Read Only’ access or ‘Full Access’.
  - ‘Read Only’ access allows the Healthcare Proxy to view the contents of the account they have been given access to.
  - ‘Full Access’ allows the Healthcare Proxy full control of the account they have been given access to.

- Enter the ‘Proxy Name’.
- Click the ‘Proxy Relationship’ drop down menu to select the relationship the proxy has with you.

- Enter a security passcode. The proxy must enter your exact passcode to have access to your account.
- Click the ‘Grant Proxy Access’ button to send the invite to the Healthcare Proxy.
  - If you are granting ‘Full Access’ you will be prompted with the ‘Proxy Contact Information’ window.
    - Enter in the proxy’s contact information and review the ‘Terms of Service’.

  - Click the ‘I Accept’ button if you agree to the Terms of Service.
    - The ‘Grant Proxy Request’ will then be sent.

**Deleted Items**

The ‘Restore Deleted Items’ hyperlink allows you to restore items you have delete from your health record.
• Click the ‘Restore’ icon to restore the deleted item back to your health record.
  
  o Click the ‘Save’ button after you have restored your items.

**Deactivate Account**

The ‘Delete Account Permanently’ hyperlink allows you to remove all of your connections and deletes your FollowMyHealth™ account. This includes any data you have downloaded from clinical organizations as well as manually added items.

• If you delete your account and wish to recreate it, you will need to re-register for FollowMyHealth™ and request another invite in order to retrieve your health record.

**Add Authentication Methods**

The ‘Add Authentication Methods’ allows you to either change or use multiple authentication methods. Supported methods are: Microsoft Live ID, Yahoo, Google Mail and Facebook.

• Click the ‘Plus’ icon to add a new method to log in with.
  
  o Select the method you wish to add.

  ❖ Click ‘Ok’.
  
  o You will then be prompted to login with your existing account.

  o Once you enter your login credentials, the method will display.

  ❖ You can add all four authentication methods if you have an account for each.
  
  ❖ You are only allowed one account for each method.

• The ‘X’ icon allows you to delete a method from your list.
  
  o Highlight the method you wish to delete.

  ❖ Click the ‘X’ icon.
  
  o You are prompted with a ‘Remove Authentication Provider’ window.
Click ‘Yes’ to remove this authentication method.

Support
If you have a question about your Patient Portal, please consult the ‘Support’ hyperlink.

- If you have basic questions about how the product works or your question is related to your medical information or care, please contact the applicable clinical organization listed.

- If you would like to report an issue or suggest improvements to FollowMyHealth™, please contact Jardogs at our support e-mail address.
**Home Screen**
The ‘Home’ tab displays different widget based programs that can be installed, moved and deleted from your home screen.

**Healthcare Apps**
The ‘Add Healthcare Apps’ hyperlink allows you to install or uninstall a widget.

- Click the ‘Add Healthcare Apps’ hyperlink.
- To uninstall a widget that is already displaying on your Home screen, click the ‘Uninstall’ button.

- To install a widget click on the ‘Install’ button.
  - You must then specify which side you want the widget to be displayed.
  - Click the ‘Save’ button when you have finished.
    - To change the view within the Healthcare Apps click the drop down arrow. You have 3 options to display the healthcare apps: List, Details, and Large Icons.

- Each widget can be moved or deleted from the Home screen.
  - Highlight a widget to reveal the move and remove icons.
  - The ‘Move this widget’ icon allows you to move a widget to a different spot within the Home screen.
  - The ‘Remove from this screen’ icon allows you to remove a widget from your Home screen.
The widgets currently available through FollowMyHealth™ are:

- **News Feed**: This application displays news concerning your health record and organizations you are connected to.
  - Each item in your News Feed is hyperlinked. Clicking on a hyperlink will navigate you to that corresponding section within FollowMyHealth™.

- **Appointments**: This application displays your upcoming appointments.

- **Health Reminders**: This application displays automated health maintenance reminders, based on information your doctor has entered in to their electronic medical record, to help you achieve the best care and results possible.

- **Health News**: This application returns the top results from Google’s Science Daily, Health.

- **Profile**: This application guides you to use all the features of your personal health record.

- **Health Summary**: This application shows a snapshot of your health profile, including latest height, weight, and blood pressure.

- **Contact Information**: This application shows contact information associated with your health record.

- **My Profile**: This application shows basic information tied to your profile, such as name, address, and contact information.

- **My Charts**: This application charts results you have highlighted in your health record. This application may also display results which occur frequently within your record.
**Messages**

The ‘**Messages**’ tab is similar to any e-mail.

The inbox contain messages related to your medical record. This includes private messages between you and your provider.

- The “Add a Category” icon allows you to create a personalized folder to store your important messages.
  - Name the folder.

- The “Remove a category” icon allows you to remove a folder that you have created.

- The “Move To…” drop down allows you to move a highlighted message from your inbox to the trash or a folder.

- The “Compose a new message” icon allows you to send a message to your provider.
  - You are able to choose a provider that you have had an encounter with and that allows messaging from the drop down menu.
**My Health**
The ‘My Health’ tab contains your Electronic Medical Record. The tabs are intuitive and contain information directly related to their label.

- The ‘Tab View’ contains ten tabs related to your health record.

**Summary**
The ‘Summary’ tab displays different widgets that can be installed, moved and deleted from your summary screen. The Summary tab is similar to the Home screen.

- Please refer to the ‘Home’ screen section for more information.

**Conditions**
The ‘Conditions’ tab allows you to view, add and resolve health conditions.

- To add a health condition, type the condition in the text box provided.
  - Select your health condition from the list that populates.
  - Click “Add Health Condition”.
  - Enter the Onset date. The Resolved, Identified By, and Notes are all optional fields.
  - Click on the “Save” button when you are finished.

- The “Show details for a condition” icon allows you to view your condition information.
- The “Remove a condition” icon allows you to remove a condition from your personal health record.
  - Removing a condition from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Medications**
The ‘Medications’ tab allows you to view, add and renew medications.

- To add a medication, type the medication in the text box provided.
Select your medication from the list that populates.
  ✗ Click “Add Medication”.

Complete the required fields: How Many, Strength, Units and Status.
The Notes field is optional.
  ✗ Click on the ‘Save’ button when you are finished.

- The ‘Show details for a medication’ icon allows you to view your medication information.
- The ‘Request a prescription renewal’ icon sends a renewal request to your provider.
  ➢ Please Note: Prescriptions can only be requested from doctors who have prescribed the medication to you in the past.

- The ‘Remove a medication’ icon allows you to remove a medication from your personal health record.
  ➢ Removing a medication from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Allergies**
The ‘Allergies’ tab allows you to view and add allergies.
- To add an allergy, type an allergy in the text box provided.
  - Select your allergy from the list that populates.
    ✗ Click ‘Add Allergy’.
  - Click the “Non-Medication Allergy” drop down to select between non-medication allergy or medication allergy.
  - Enter to Onset date. The Resolved, Identified By, and Notes are all optional fields. You can even add the Allergy Type and the Allergic Reaction.
    ✗ To add an Allergic Reaction, type the reaction in the text box provided.
      ➢ Click the ‘Add’ icon.
      ➢ Click on the ‘Save’ button.
The ‘Show details for allergy’ icon allows you to update your allergy information.

The ‘Remove an allergy’ icon allows you to remove an allergy from your personal health record.

- Removing an allergy from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Immunizations**

The ‘Immunizations’ tab allows you to view and add immunizations.

- To add an immunization, type the immunization in the text box provided.
  - Select your immunization from the list that populates.
    - Click ‘Add Immunization’.
  - Enter the Administered Date. The Dose, Route of Administration, Manufacturer, Series, and the Notes field are optional.
    - Click on the “Save” button when you are finished.

- The ‘Show details for an immunization’ icon allows you to update your immunization information.
- The “Remove an immunization” icon allows you to remove an immunization from your personal health record.
  - Removing an immunization from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Procedures**

The ‘Procedures’ tab allows you to view and add procedures.

- To add a procedure, type the procedure in the text box provided.
  - Select your procedure from the list that populates.
    - Click ‘Add Procedure’.
  - Enter the Procedure date. The Performed By, and Notes are optional fields.
    - Click on the ‘Save’ button when you are finished.
The ‘Show details for a procedure’ icon allows you to update your procedure information. 
The ‘Remove a procedure’ icon allows you to remove a procedure from your personal health record.  
- Removing a procedure from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Results**
The ‘Results’ tab allows you to view, add, and graph your results.  
- To add a result, type the result in the text box provided.  
  - Select your result from the list that populates. 
    - Click ‘Add Result’.
  - Enter the Result Date, Value and the Units. The Ordered By and Notes are optional fields.
    - Click on the ‘Save’ button when you are finished.
- The ‘Show details for a result’ icon allows you to update your result information.
- The ‘Chart’ icon allows you to chart your result information.
- The ‘Remove a result’ icon allows you to remove a result from your personal health record.  
  - Removing a result from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Vitals**
The ‘Vitals’ tab allows you to view, add, and graph your vitals.  
- Click the drop down arrow and choose the vital you wish to add.  
  - Click ‘Add Vital’.
  - Enter the Value, the Units and the Date Taken. The Notes field is optional.
    - Click on the ‘Save’ button when you are finished.
The “Show details for a vital” icon allows you to update the vital you selected.

The “Chart the value of a vital over time” icon allows you to graph your selected vitals.

- The ‘Pin’ icon allow you to pin this chart to your health record.
- The ‘Print’ icon allows you to print the graph.
- The ‘Remove a vital’ icon allows you to remove a vital from your personal health record.
- Removing a vital from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Social History**
The ‘Social History’ tab allows you to view and add personal and family health conditions.

- To add a personal health condition, type the health condition in the text box provided.
  - Click ‘Add Personal Health Condition’.
  - Enter the Frequency and the Intervals. The Identified By and Notes are optional fields.
    - Click on the ‘Save’ button when you are finished.

- To add a family health condition, type the health condition in the text box provided.
  - Click ‘Add Family Health Condition’.
  - Select the Family Relationship from the drop down selection. The Identified By and Notes are optional fields.
  - Click on the ‘Save’ button when you are finished.
The ‘Show details for a condition’ icon allows you to update your personal health information.

The ‘Remove a condition’ icon allows you to remove a personal health condition from your personal health record.

- Removing a condition from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Documents**

The ‘Documents’ tab allows you to view Scanned Documents and Notes in your health record. Simply double click to open a document.

- The ‘View the selected document’ icon allows you to view the selected document.
- The ‘Add a document’ icon allows you to add an electronic document to your personal health record.
- The ‘Remove the selected document’ icon allows you to remove a document from your personal health record.

- Removing a document from FollowMyHealth™ only affects your personal health record. It does not impact data in your legal record maintained by your physicians.

**Chart View**

The ‘Chart View’ tab contains the same information as the Tab View, but displays it in a list that is grouped by Data or Provider.

- Click the ‘Sort By’ drop down menu to sort by Date or Provider.

**Search View**

The ‘Search View’ tab allows you to search your record for specific information regardless of time or provider.

- There is also a search box located on the My Health banner.
**Patient Banner Icons**

The ‘Patient Banner Icons’ are located in the top right corner of the My Health window

- The ‘Email health record’ icon allows you to email items from your health record.
- The ‘Fax health record’ icon allows you to fax items from your health records.
- The ‘Print health record’ icon allows you to print your health record.
- The ‘Export health record’ icon allows you to export your health record.
**My Doctors**

The ‘My Doctors’ tab displays all providers with whom you have had an encounter, including appointments. They are listed in order of frequency.

Each provider’s profile gives you basic information about them and shows you what services they have enabled.

- The ‘View provider’s details’ icon allows you to view your providers Specialties, Contact Info, Credentials, and Primary Organization.

- The ‘Schedule a new appointment’ icon allows you to schedule an appointment.
  - Select the Organization and the Provider from the drop down menus.
  - Select the preferred appointment date.
    - Multiple dates may be selected by holding the Ctrl key.
  - Enter a Reason for Appointment and any Special Instructions you may have.
    - Click ‘OK’.

- The ‘Request a referral’ icon allows you to request a referral.
  - Select the Organization and the Provider from the drop down menus.
  - Select the preferred appointment date.
  - Enter a Reason for Referral and any Comments you may have.
    - Click “OK”.

- The “Request a consultation” icon allows you to request a consultation.
Type a message in the Body field and click the Send button.

- The ‘Remove a doctor’ icon allows you to remove a provider from your My Doctors tab.

When a provider is highlighted, the same options are presented by clicking the appropriate button.
Appointments
The ‘Appointments’ tab displays the time, provider, and location of appointments.

- Click on an Upcoming Appointment.
  - The ‘Schedule a new appointment’ icon allows you to schedule an appointment.
  - The ‘Reschedule an appointment’ icon allows you to select an upcoming appointment and reschedule it.
    - Clicking this icon will prompt a Reschedule Schedule box.
    - Click “Yes” to reschedule your appointment.
  - The “Cancel an appointment” icon allows you to cancel an upcoming appointment.
    - Clicking this icon will prompt a cancel appointment box.
    - Click “Yes” to proceed with the cancellation.
  - The “Filter cancelled appointments” icon allows you to display all of your cancelled appointments.
- The ‘Export Appointment’ icon allows you to export your appointment to add to an external device’s calendar.
**Billing**

The ‘Billing’ tab shows any ‘Unpaid’ or ‘Paid’ Invoices and allows you to pay them online. Pending insurance payments are also displayed.

- The ‘Unpaid’ Icon allows you to view and pay for existing charges.

- The ‘Paid’ icon allows you to view all of your paid invoices.

- The ‘Pay All Invoices’ check box allows you to pay all of your displayed charges.

- You can do partial payments by selecting a check box and manually typing the dollar amount you wish to pay.

- ‘Pending with Insurance’ will show the outstanding claims that have been sent to your insurance carrier for payment.
**My Info**

The ‘My Info’ tab allows you to update your basic demographics, emergency contact, responsible party, and insurance information.

- The ‘Save All’ button allows you to save all the information you entered within the four major tabs in ‘My Info’.
- The ‘Send To’ button allows you to send your information to your connected organizations.
  - Click the ‘Send To’ button to display the organizations you are connected with.
  - Check the box next to the organizations you wish send your information and click, ‘Send to Selected Organizations’.

**General**

The ‘General’ tab allows you to update your basic information, social information and preferred pharmacy.

- To update your demographics, click the ‘Edit’ icon next to ‘Basic Information’.
- The ‘Edit’ icon exposes the editable fields.
- The ‘Finish and Save’ icon allows you to save your changes and send the information to an organization you are connected with.
- The ‘Cancel’ icon will cancel any changes you made to your information.
  - Click the ‘Finish and Save’ icon after you have updated your demographics. You will then be prompted with a ‘Send to Organizations’ window.
Click the ‘Yes’ button if you want send your updated information to your connected organizations. You are then prompted with the ‘Select Organizations’ window.

The organizations you are connected with will display. Check the organizations that you wish to send your updated information and click, ‘Send’.
- The organizations will then receive your updated information.

To answer the federal requirement questions, click the ‘Edit’ icon next to ‘Social Information’.
- It is a federal requirement that we ask the next questions. If you are uncomfortable answering any of these, you have the option to decline (by choosing ‘declined to Answer’ in the dropdown).

Highlight any of the ‘drop down’ menus to display a ‘Tool Tip’ with more information.

To answer any of the following questions, click the corresponding ‘drop down’ menu.

When you have finished answering the following questions, click ‘Finish and Save’.

To add a pharmacy, click the ‘Edit’ icon next to ‘Preferred Pharmacy’.

The ‘Find a Pharmacy’ window will display.

Enter your zip code, if the zip code provided is incorrect.
- The zip code field will default to the zip code entered in FollowMyHealth™.
Click the ‘Distance in Miles’ drop down menu to broaden your search.

You also have the option to type in a pharmacy name. Type the name of your pharmacy in the ‘Pharmacy Name’ space.

- You are not allowed to free text your pharmacy. Typing in the name of the pharmacy will populate a list of existing pharmacies.

- Highlight the preferred pharmacy and the click the ‘Connect’ button.
  - To remove your preferred pharmacy, click the ‘Clear’ hyperlink under ‘Preferred Pharmacy’.

**Emergency Contact**
The ‘Emergency Contact’ tab allows you to update your emergency contact information.

- To update your emergency contact information, click the ‘Edit’ icon next to ‘Emergency Contact’.

  - When you have finished updating your emergency contact information, click ‘Finish and Save’.

**Responsible Party**
The ‘Responsible Party’ tab allows you to update your guarantor information.

- To update your guarantor information, click the ‘Edit’ icon next to ‘Responsible Party Information’.
• When you have finished updating your guarantor information, click ‘Finish and Save’.

**Insurance**

The ‘Insurance’ tab allows you to update your primary, secondary and tertiary insurance.

• To update your insurances, click the ‘Edit’ icon next to ‘Insurance Information’.
  
  o The ‘Demote’ icon allows you to demote your insurance policy.
  o The ‘Promote’ icon allows you to promote your insurance policy.
  o The ‘Clear Information’ removes your insurance information entered within the section.

• When you have finished updating your primary, secondary and tertiary insurances, click ‘Finish and Save’.

• You can hide insurance information by collapsing the headers.
  
  o Click on the insurance headers to collapses the insurance information.
Connections
The ‘Connections’ tab displays the Organizations to which your Electronic Health Record is connected.

- The ‘Add a connection to another organization’ icon allows you to connect with another organization.
  - Fill out the ‘Find an Organization’ window.
  - Any organization that fits your criteria will display.
  - Highlight the organization and click the ‘Connect’ button.
    - You will be in Pending status with that organization.

- The ‘Manage’ icon allows you to modify what information is communicated between you and the organization.
  - Detract or add connection by simply clicking on the appropriate type.

- The ‘Schedule a new appointment’ icon allows you to schedule an appointment with the highlighted organization.

- The ‘Remove this connection’ icon allows you to remove the connection with the highlighted organization.

- The remaining buttons will take you to the corresponding material for the organization.
If you have further questions about functionality of an item that is (or is not) listed please contact Jardogs Support via email or by logging a case.

• www.jardogs.com/support.aspx
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