

MAKE THE MOST OF MYCHART

Overview	2
Navigate the Home Page.....	2
Making the Most of MyChart User Guide	3
Manage a Patient’s Health	3
Test Results	4
Medications.....	6
Health Summary.....	9
Patient Overview.....	11
Pregnancy Information.....	12
School Health Summary Report	13
Visits	14
Questionnaires	16
Social Assistance	17
Schedule an Appointment.....	18
Messaging	22
View a Message.....	23
Upload Pictures or Documents	23
Send a Message.....	25
Billing and Insurance	26
Make a Payment	27
Set up a Payment Plan	28
Sign Up for Paperless Billing.....	29
Update Insurance Information.....	30
Manage Your Account.....	31
Personal Information	31
Security Settings.....	32
Personalize	32
Linked Apps and Devices.....	33
Communication Preferences.....	34
MyChart Sharing Hub	34

Overview

MyChart is Epic's patient portal that provides you with online access to your medical record and allows you to actively participate in your healthcare.

With MyChart you can:

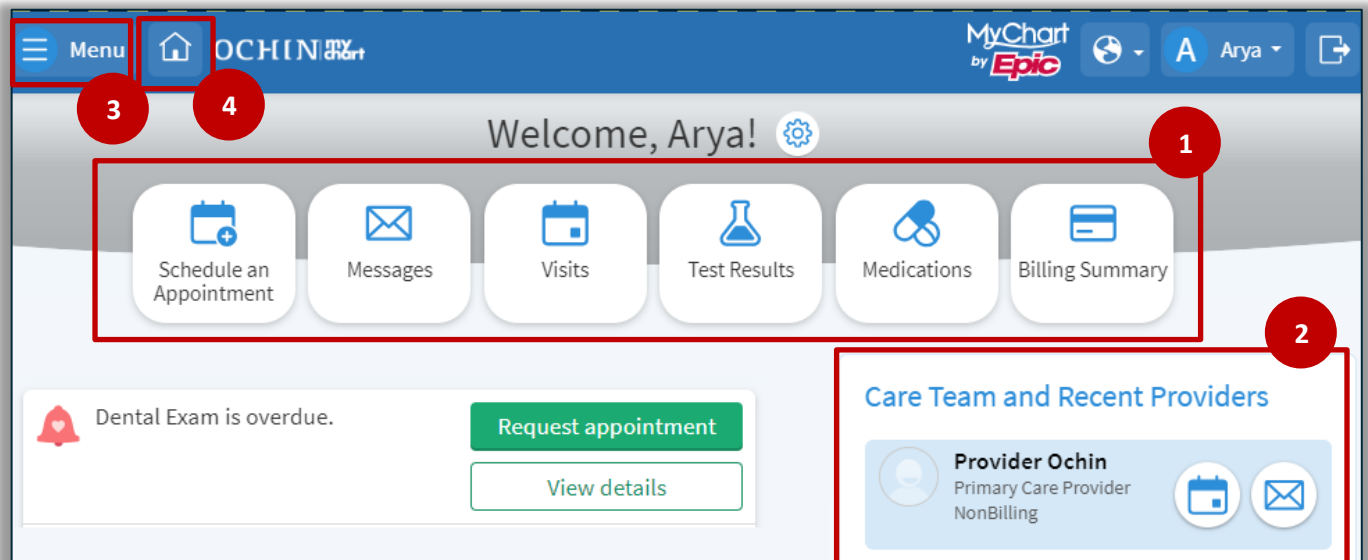
- View test results
- Request and manage appointments
- Pay medical bills
- Communicate with the doctor
- Request prescription refills

This guide provides an overview of many of MyChart's features and how to use them.

Navigate the Home Page

When first logging into MyChart, the **Welcome!** Page will display.

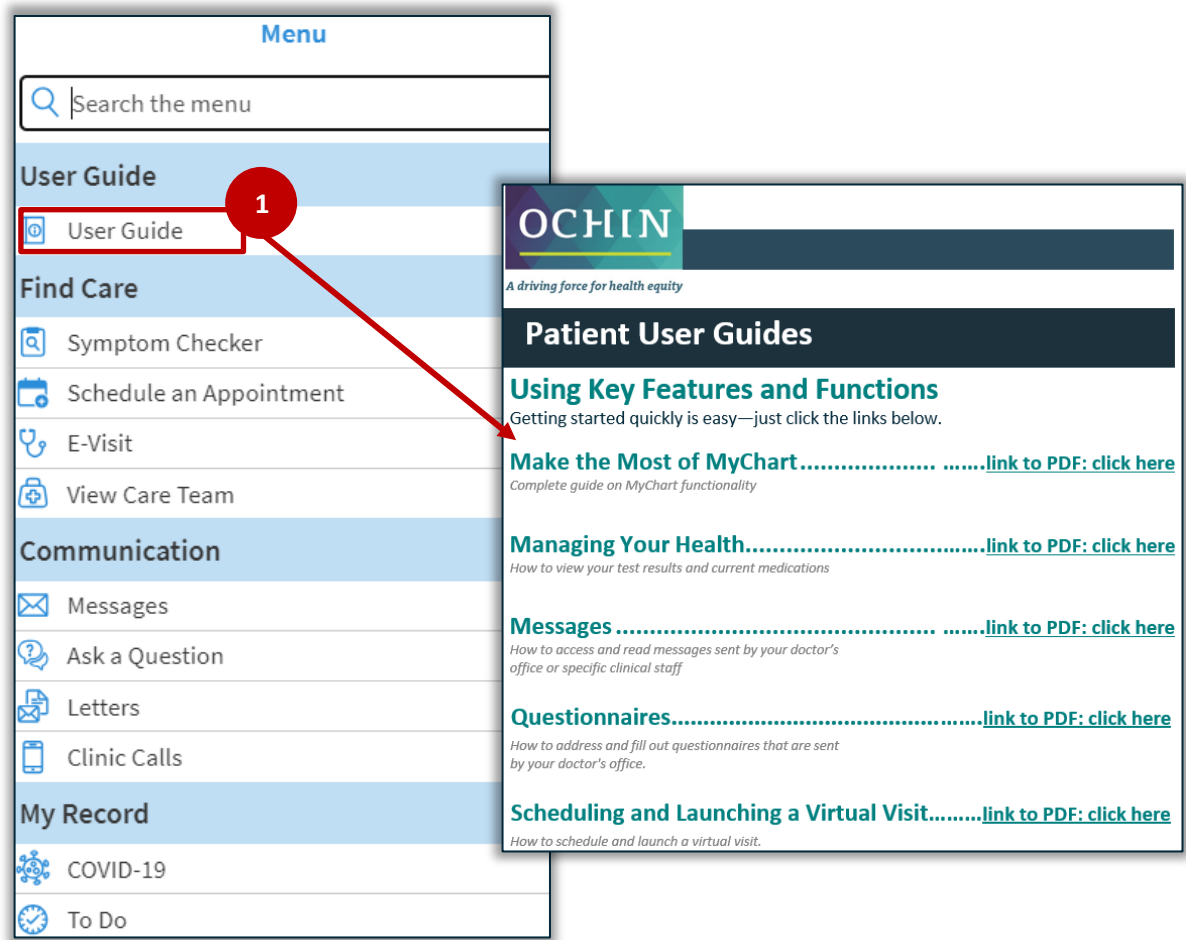
1. At the top of the page, are six shortcut tiles that allow you to navigate to the desired activity.
2. A viewing pane shows the **Care Team** and **Recent Providers** you have seen.
3. The **House** icon at the top of each page returns you to the home page.
4. Use the **Menu** dropdown to see other available functionality.



Making the Most of MyChart User Guide

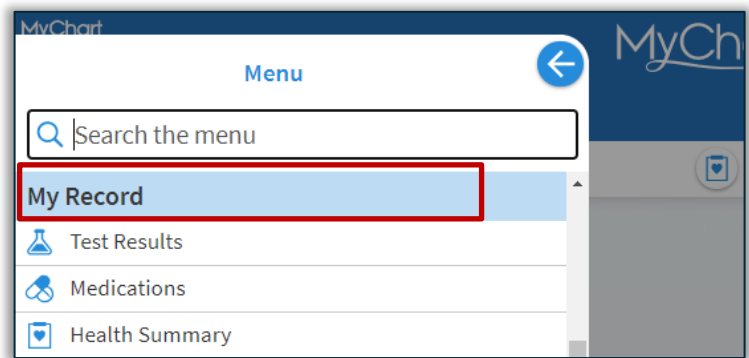
From **Menu**:

1. Click **User Guide** to open a downloadable PDF file on various patient user guides.



Manage a Patient's Health

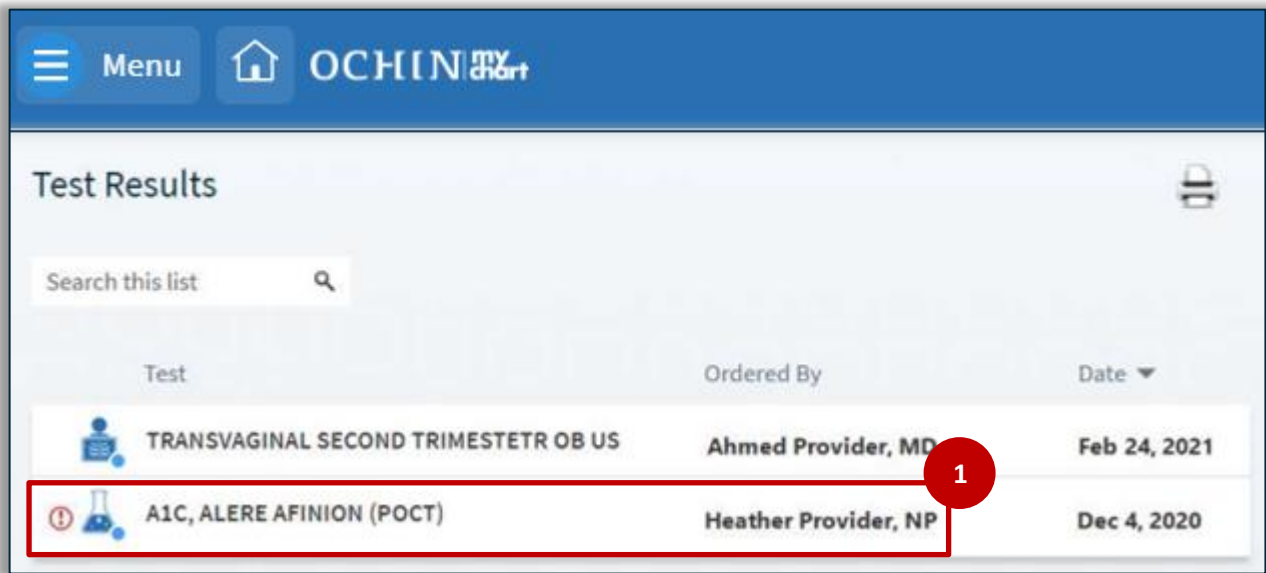
The health information is under the **My Record** section of the Menu. Select an option from the menu to see more details.



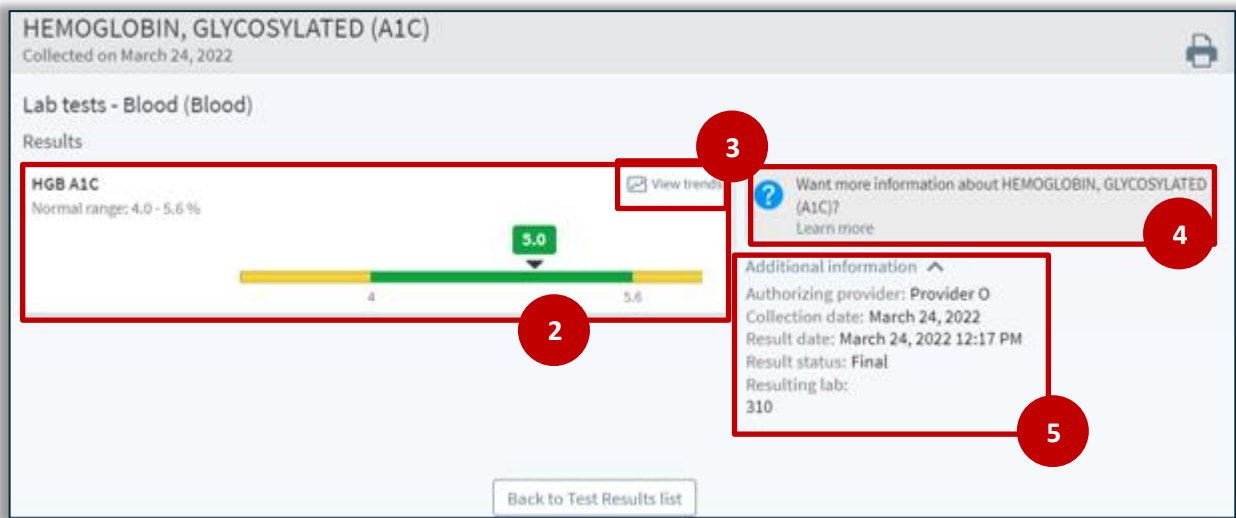
Test Results

From the Test Results activity see results as soon as they become available:

1. Click the test result to view details.



2. The result will display the results and the Normal range for the test.
3. Select **View trends** to see results over differing timelines.
4. Information is available about the test by selecting **Learn more**.
5. Click **Additional information** to view Provider, Collection information and the Result status.



If the Care Team has not reviewed the results of the test, a message will appear under the test name:

Not Reviewed

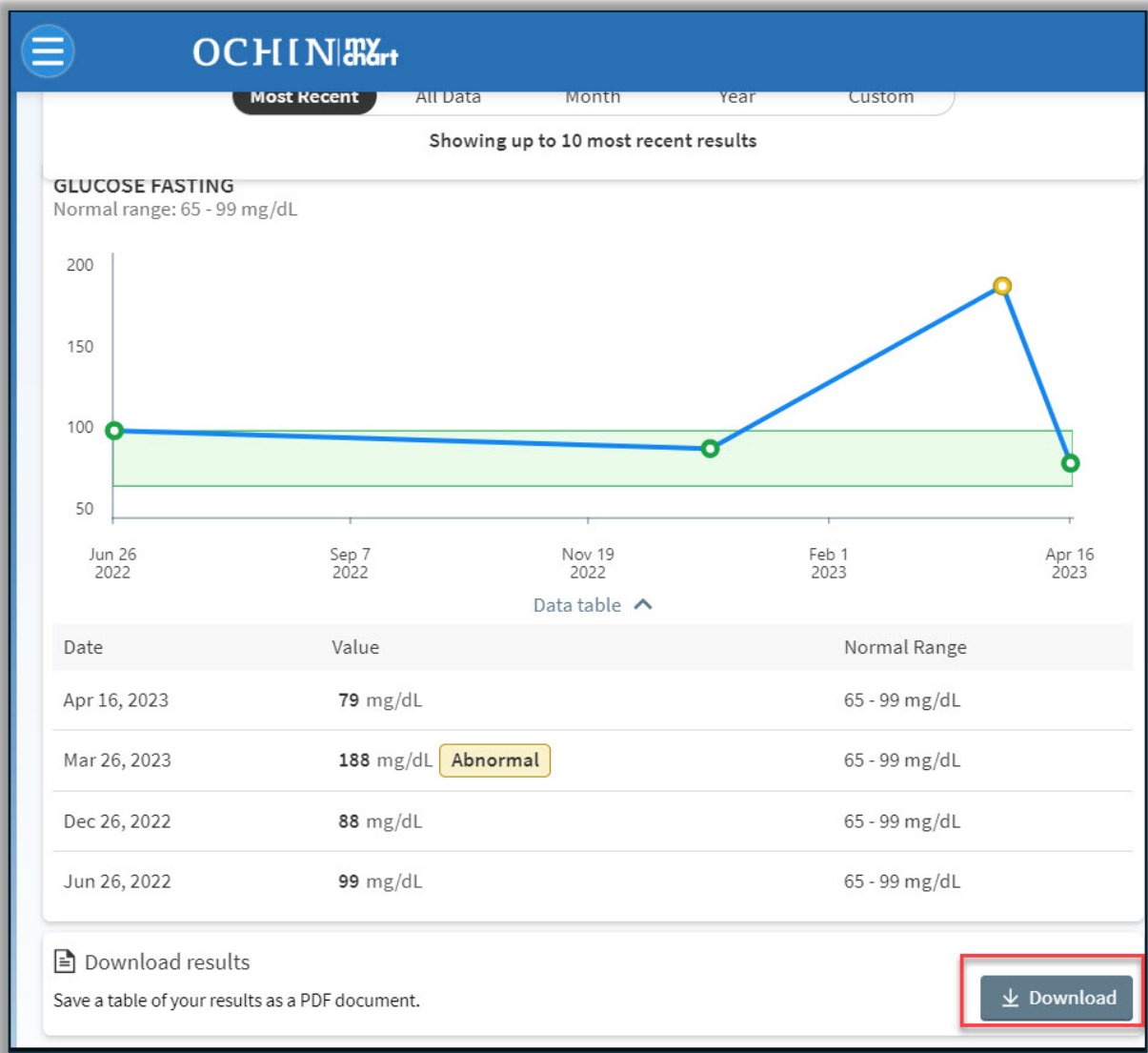
This test result was made available to you before your care team had a chance to review it.

OK

6. MyChart Test Results **Download** button downloads the patient's last 75 test results as a PDF document and displays results in a trending graph with data table below graphs. Test results from outside sources using Happy Together display as part of the last 75 test results.



MyChart mobile application must updated to version 10.4 or higher for test result download functionality to work.



Medications

From the Medications activity the details for each medication are displayed, including the prescribed dosage, instructions, and the physician who prescribed the medication.

Keep the provider updated about changes to medications and pharmacies:

- 1. If no longer taking the medication, click **Remove**.
- 2. To update the preferred pharmacies, click **Go to Manage my Pharmacies**.

Menu

OCHIN

Medications

Current Medications

Please review your medications and verify that the list is up to date. Call 911 if you have an emergency.

Need to update your list of pharmacies? Go to Manage My Pharmacies.

Rx Request

albuterol HFA 90 mcg/actuation inhaler

Learn more

Inhale 1 Puff into the lungs every 4 (four) hours as needed

Prescription Details

Started taking June 12, 2023

Documented by Shannon J

1

Rx Request

Remove

- 3. If a refill is needed on a medication, click **Rx Request** (it is only possible to request refills on prescriptions that were placed by the provider at the clinic).

fexofenadine 180 mg tablet

Commonly known as: Allergy Relief (fexofenadine)

Take by mouth

Refill due soon

2 refills before July 20, 2024

Prescription Details	Refill Details	Pharmacy Details
Prescribed July 21, 2023	Quantity 90 Tablets	WNC COMMUNITY HEALTH SERVICES INC
Approved by Provider Testcc	Next fill July 21, 2023	257 BILTMORE AVE, ASHEVILLE NC 28801
		828-285-0622

3

Rx Request

Remove

4. In addition, when first logging into MyChart, a health card reminder for patients to refill their medications displays. The card takes patients directly to the refill workflow, with all refills due soon selected automatically.

Welcome!

 You have 5 prescriptions with refills due soon.

Request refills

Dismiss

 Cholesterol Screening is overdue.

View details

5. Each medication that has a refill due soon has its own badge with the expected refill date in the tooltip.



losartan 25 mg tablet

Commonly known as: Cozaar

Take 25 mg by mouth once daily

Refill last requested on August 22, 2023 

Refills

Refillable Medications

Please contact your pharmacy for any refills. If the pharmacy indicates that you need to contact your provider, please allow a few business days for processing. If you have an urgent request and the pharmacy is unable to assist you, please contact the clinic by telephone.

Choose prescriptions to refill.

If the prescription you wish to refill is not on this list, select "Other." You can write the medication name, and any other necessary details, in the comments box.

Include all refills due soon ☐

fexofenadine 180 mg tablet

Commonly known as: Allegra Relief (fexofenadine)

Refill due soon 

Your refill for this prescription was due on August 17, 2023. If you have questions about your prescription or want to request a refill, contact your provider or pharmacy.

2 refills before July 20

Take by mouth

Prescription Details

Prescribed July 21, 2023

Approved by Provider Testcc

Refill Details

Quantity 90 Tablets

Next fill July 21, 2023

Pharmacy Details

WNC COMMUNITY HEALTH SERVICES INC

257 BILTMORE AVE, ASHEVILLE NC 28801

828-285-0622

© 2024 OCHIN. This material contains confidential and copyrighted information of Epic Systems Corporation.

Page 7 of 36

6. Pharmacy hours appear in the Prescriptions Ready for Pickup section of the Medications page.

Pharmacy

Selected Refills

enoxaparin 40 mg/0.4 mL syringe
Commonly known as: Lovenox
Quantity: 12 mL

Enter comments for this prescription

Delivery Method

☒ Pick up at a pharmacy

☐ Deliver by mail

Pharmacy Info

Pharmacy

WNC COMMUNITY HEALTH SERVICES INC

WNC COMMUNITY HEALTH SERVICES INC
Pharmacy Hours: 8:00 AM TO 6:00 PM MON-FRI. CLOSED SAT & SUN

Pickup date

MM/DD/YYYY

Pickup time

HH:MM AM/PM

If requesting a refill and the pharmacy is not able to process the request, patients may see flags entered on the request.

- **Delayed** – When Pharmacy staff uses the Prescription Delayed notification the system automatically adds a Prescription Delayed Flag and patients see it on the prescription in MyChart. This also Includes sending an email notification.

acetaminophen 325 mg tablet
Commonly known as: Tylenol

Take by mouth
Take orally via oral ⓘ

Delayed

Fill in progress ⓘ

No refills remaining

Prescription Details	Refill Details	Pharmacy Details
Prescribed December 13, 2022	Quantity 30 Tablets	VG BEAVERTON PHARMACY
Approved by Provider T	Next fill December 13, 2022	2725 SW Cedar Hills Blvd , Suite 200, BEAVERTON OR 97005
		503-352-6006

Remove

- Out of Stock** – When the pharmacy does not have enough stock to fill the prescription, an automatic notification is sent to patients to let them know the medication is out of stock. There is also an information icon available to select to see more information.

[illegible]

- All medications appear on the **MyChart Medications** page and **MyChart AVS Report** for the patient in their MyChart account (even if the medication is set to hidden for proxies). If the medication is set to be hidden for the proxy, then a "Hidden From..." indicator appears in the medication card.

Cefdinir 125 mg/5 mL suspension

Commonly known as: Omnicef

Take 5 mL by mouth 2 (two) times daily

Hidden from Addie QA

Fill in progress

3 refills before January 11, 2025

Prescription Details

Prescribed January 12, 2024

Approved by Summer Qapplebaum

Refill Details

Quantity 300 mL

Day supply 30

Pharmacy Details

VG BEAVERTON PHARMACY

2725 SW Cedar Hills Blvd , Suite 200, BEAVERTON OR 97005

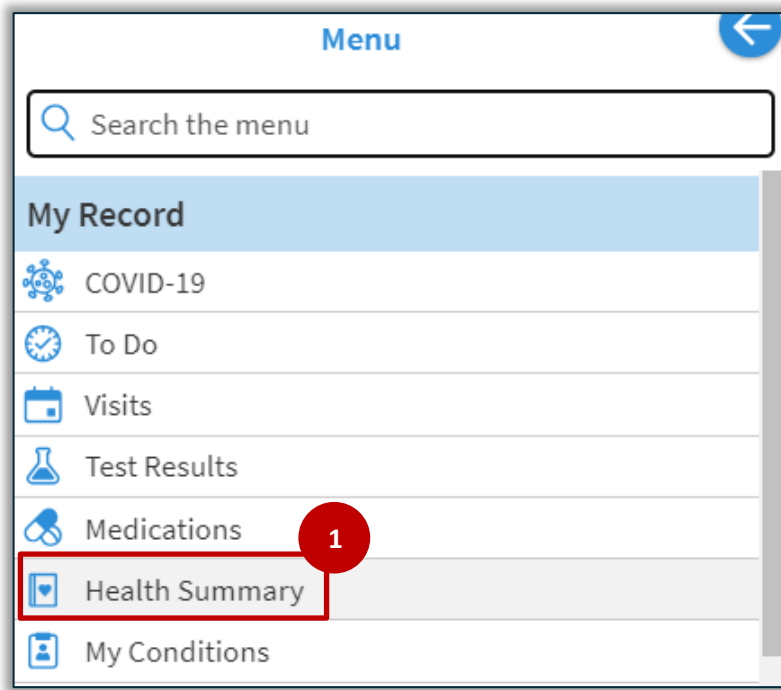
503-352-6006

Message pharmacy

Remove

Health Summary

1. From the Menu select **Health Summary** under the My Record section.



The Health Summary in MyChart's Patient Overview offers a comprehensive snapshot of essential information, allowing patients to view everything at a glance on a single, easily accessible page.

- a. **Header**- Shows your last and next visits, blood type, height, and weight.
- b. **Health Goal**- Lets patients enter personal health goals.
- c. **Recommended Actions**- Displays recommended tasks related to immunizations, allergies, current health issues, and preventive care topics.
- d. **Quick Links**- Easy navigation to related activities, such as preventive care, test results, and school health summary.

Health Summary
 Weight: 155 lb (70.3 kg) | Age: 24 | Last visit: Aug 30, 2024 - Office Visit

Medications
 albuterol HFA 90 mcg/actuation inhaler
 insulin aspart 100 unit/mL (3 mL)
 Commonly known as: NovoLOG

Current Health Issues
 Diet controlled gestational diabetes mellitus (GDM) in first trimester
 Mood changes
 Prenatal care
 Type 1 diabetes mellitus without complication
 Wheezing

Recommended Actions
 1 task left for today
 Completed 0%
 1 general task
 View tasks

Health Goal
 You have no health goals shared with your care team.
 Sharing a health goal with your care team can help them discuss your plan of care with you at future visits.
 Add goal

Allergies
 Grass Pollen
 Bee Sting
 Reactions: Rash, Itching, Swelling
 Hickory Nuts
 Reactions: Hives

Immunizations
 No immunizations on file.

Quick Links
 Visits
 Preventive Care
 Upcoming Tests and Procedures
 Test Results
 Download School Health Summary
 Sharing Hub

Back to the home page



The same features found in the web application are available in the mobile app. **Note:** To see updates in the mobile app, patients must update the app to version 10.9 or higher.

Patient Overview

The Patient Overview activity provides view-only demographic information that has been documented in their chart. This activity consists of four sections:

- **Patient Overview** - provides legal and referred information, such as birth date, legal sex, gender identity, name, and medical record number.
- **Patient Demographics** - includes additional detailed demographic information, such as an address, social security number, phone numbers, additional names, preferred language, etc.
- **Employer Information** - provides documented employment information, such as employment status, employer, employment date, employee ID, occupation, industry, employer's address, phone, and fax number.
- **Medical Record Numbers** - displays the patient's Service Areas they are associated with and the corresponding Medical Record Number (I EPT 2060).

- **Travel History** - displays the patient's last documented travel history within the last 30 days.

MyChart Menu > My Record > Patient Overview

Patient Overview

Birth Date: 12/1/1990 - 31 year old Legal Sex: Female Gender Identity: Female Name: QA, MyChart MRN: <E10110588>

Current as of: 9/18/2022 1:25 PM

Demographics

Address: 123 QA St BEAVERTON OR 97003	Home Phone: 999-999-9999
	Work Phone: (Not on file)
	Mobile: 999-999-9991
SSN: xxx-xx-9999	Ethnicity: Unknown
PCP: Summer Qaapplebaum	Race: Unknown
E-mail: applebaums@ochin.org	Religion: (Not on file)
	Preferred language: Spanish

Additional Names

Preferred:	QA, Addie
Alias:	Qa, Addie

Employer Information

Employment Status	Address
Full Time	1881 SW NATIO PARKWAY
Employer	PORTLAND OR 97201
Ochin	Phone
	—
	Fax
	—

Medical Record Numbers

Enterprise Id Number	E10110588
Ochin	848000232
Virginia Garcia Memorial Hc	4236605
Multnomah County Health Dept	4521655
King County Health Department	970581640
Medicaid Id	123123

The travel screening is incomplete Travel Screening

No screening recorded since 09/17/22 1325

Travel History

No documented travel since 08/18/22

Travel since 08/18/22

[Back to the previous page](#)

Pregnancy Information

The Pregnancy Information activity shares view-only obstetrics information that has been documented in the patient's chart:

- **OB History** - shows the information on pregnancy history counts, outcomes, dates, gestation age, weight, sex, delivery, etc.
- **Dating Summary** - provides information on the patient's working Estimated Date of Delivery (EDD) based on different events.
- **Pregnancy Overview and Plan** - provides key information about a patient's pregnancy, such as her delivery plans, the number of fetuses, and feeding intentions.
- **Prenatal Vitals** - provides documented notes and vital signs information related to a specific patient's pregnancy.

MyChart Menu > My Record > Pregnancy Information

OB History

Gravida	Para	Term	Preterm	AB	Living
5	1	1		1	
SAB	IAB	Ectopic	Molar	Multiple	Live Births

#	Outcome	Date	GA	Labor/2nd	Weight	Sex	Delivery	Anes	PTL	Lv	A1	A5
1	Gravida											
2	AB		2w0d									
3	Gravida											
4	Term	04/16/22	41w2d									
5	Current											

Dating Summary

Working EDD: None selected

Based On

Last Menstrual Period on 07/01/2021 (Exact Date)

Comment: test

EDD

04/07/2022

GA Diff

Pregnancy Overview and Plan

Pregnancy: Singleton (Mono-Mono)

Fetal sex: Surprise

Delivery Plans

Deliver by GA (weeks): 40

Planned delivery method: Vaginal

Planned delivery location: Virtua Mount Holly

Reason location changed: Change of Residence

Planned anesthesia: Local

Acceptable blood products: All

Post-Delivery Plans

Feeding intentions: Breast Milk

Circumcision requested: Provider Performed

Cord blood plans: Do Not Collect

Planned adoption: Not Applicable

Planned birth control: I.U.D.

Overview & Plan:

Testing Pregnancy Overview and Plan notes

Prenatal Vitals

Enc.	GA	Weight	BP	FHR	FH	UA - Protein	UA - Glucose	Fetal Movement	Contractions	Presentation	Edema	Dilation (cm)	Effacement (%)	Station	Recent International Travel	Provider
09/18/22		140 lb (63.5 kg)	96/56	2	2			Present	Regular	Uncertain	2+	0	1	+1	P;N	Qaapplebaum, Summer

Number of Fetuses

1

[Back to the previous page](#)

Note: The Dating Summary, Pregnancy Overview and Plan, and Prenatal Vitals only display information if the patient has an active pregnancy episode.

School Health Summary Report

Review and download a School Health Summary report from the Explore More for you of the MyChart home page or from the Sharing Hub's Download School Health Summary section. The report includes health information commonly requested by schools, daycares, summer camps, and other related organizations (demographic information, allergies, current medications, current immunizations, health issues, and a current care team list) in a printable format.



The Request Download button downloads the information once the disclaimer check box is selected, "I understand and acknowledge that this document might include sensitive information. If I share this document with someone else, they can see all of this information."

Visits

From the Visits activity, see information about future and past appointments, including the date, time, and location of the visit, any pre-visit instructions, and directions to the clinic.

If an upcoming appointment is eligible for **preCheck-In**, use it to take care of tasks such as the following before arriving at the clinic:

- Pay visit copays.
- Verify or update insurance and demographic information.

- Verify or update medications, allergies, and health issues.
- Answer appointment-related questionnaires.
- Verify guarantor information.

If an upcoming appointment falls with a certain time range, **Cancel** the appointment.

Appointments and Visits

Schedule an appointment

Show: Upcoming and Past

More filter options

Upcoming Visits

Next 7 Days

APR 22 Thu

OFFICE VISIT with John Provider

Starts at 4:00 PM PDT (15 minutes)

Primary Care North

123 EXAMPLE AVE.
ASHLAND, OR 97520

preCheck-In

Details

APR 28 Wed

OFFICE VISIT with Melissa Provider

Starts at 10:15 AM PDT (15 minutes)

OCHIN PRIMARY CARE

456 BIRCH HWY
DAYTON, OH 45402

Details

Cancel appointment

For past appointments:

- Click **View After Visit Summary** to see a summary of the care received during the visit.
- See any of the doctor's visit notes that are shared by clicking **View notes**.

Past Visits

1 Year Ago

JUL 13 2020

Telemedicine Visit

William Doctor

Health Downtown Center

View notes

View After Visit Summary®

MAY 21 2020

BH/MH Visits

Jenny Therapist

East Behavioral Health

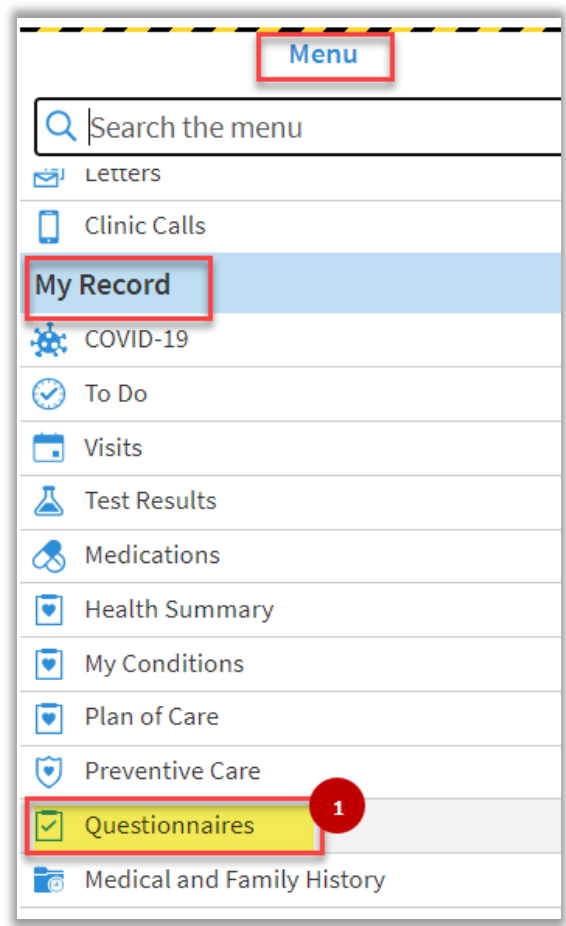
View notes

View After Visit Summary®

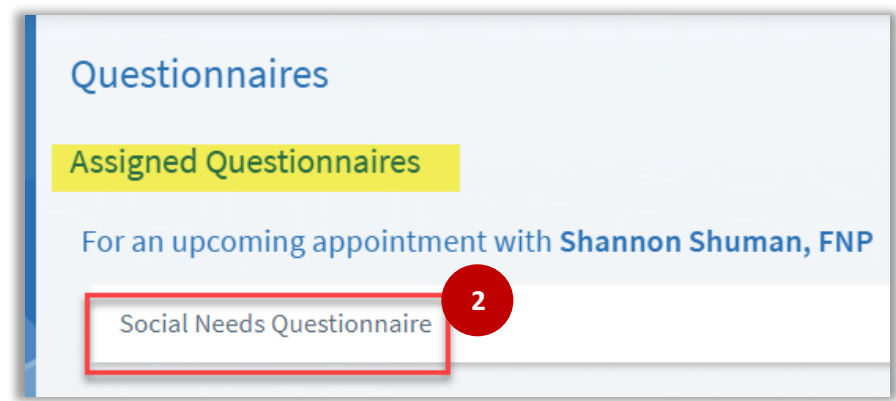
Questionnaires

The clinic might make questionnaires available from MyChart so they can be completed online instead of filling out a form at the clinic.

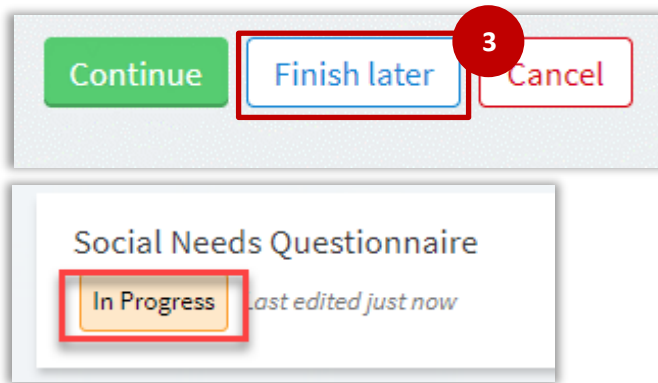
1. To see if a questionnaire has been sent to fill out prior to your visit, from the **Menu > My Record > Questionnaires**.



2. Click the questionnaire link to launch the questionnaire.



3. If it's necessary to close a questionnaire before completed, click **Finish Later** to save the progress. The link updates to an **In Progress** button.

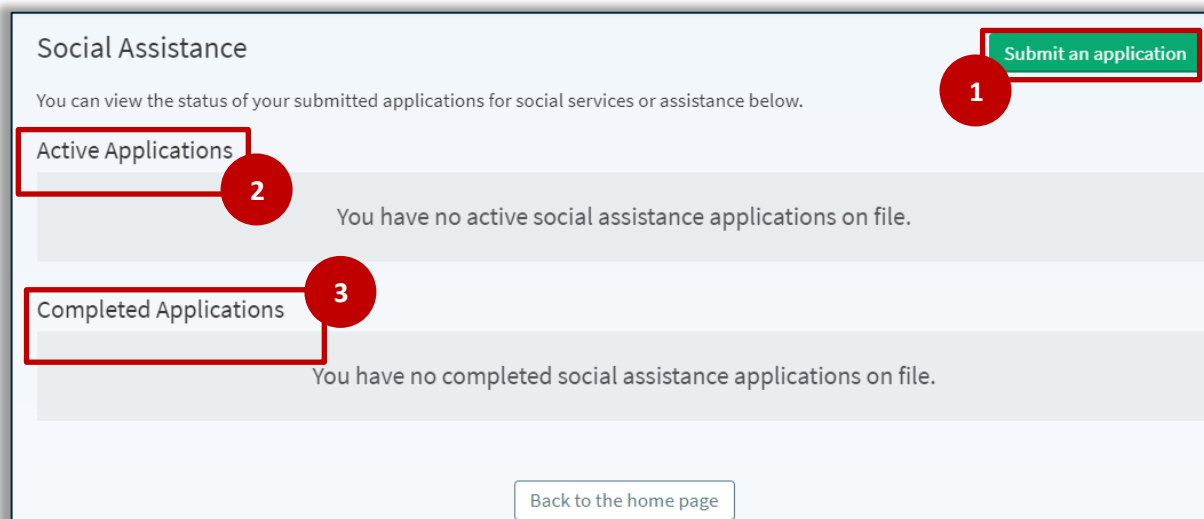


Social Assistance

Social Assistance is available in MyChart through the Menu. It helps Care Managers prioritize contacting patients that qualify, and who are interested in participating in a Compass Rose program.

Follow this path: **MyChart > Menu > Social Assistance**

1. The Social Assistance screen will display, click **Submit an application**, this will allow the patient to answer a yes or no question.
2. **Active Applications** are applications that have been submitted and a Referral is in the workqueue.
3. **Completed Applications** will display after contact has been made with the patient and the Referral is closed.

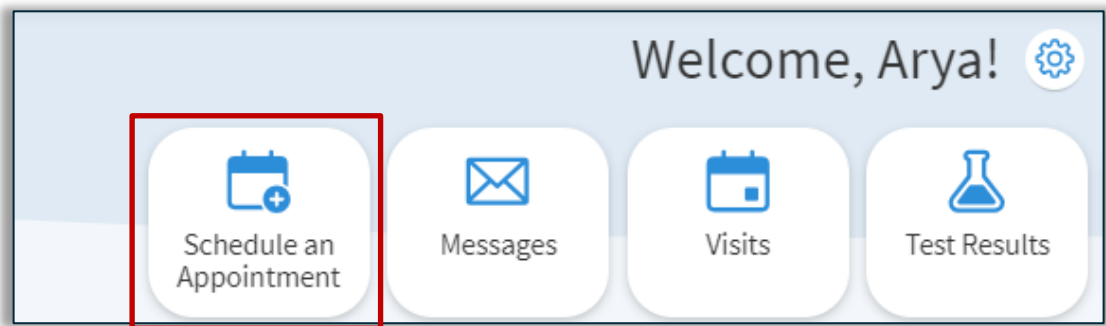


An application for social assistance can only be submitted once every 30 days. If a request is submitted before that timeframe, an error message will display in MyChart.

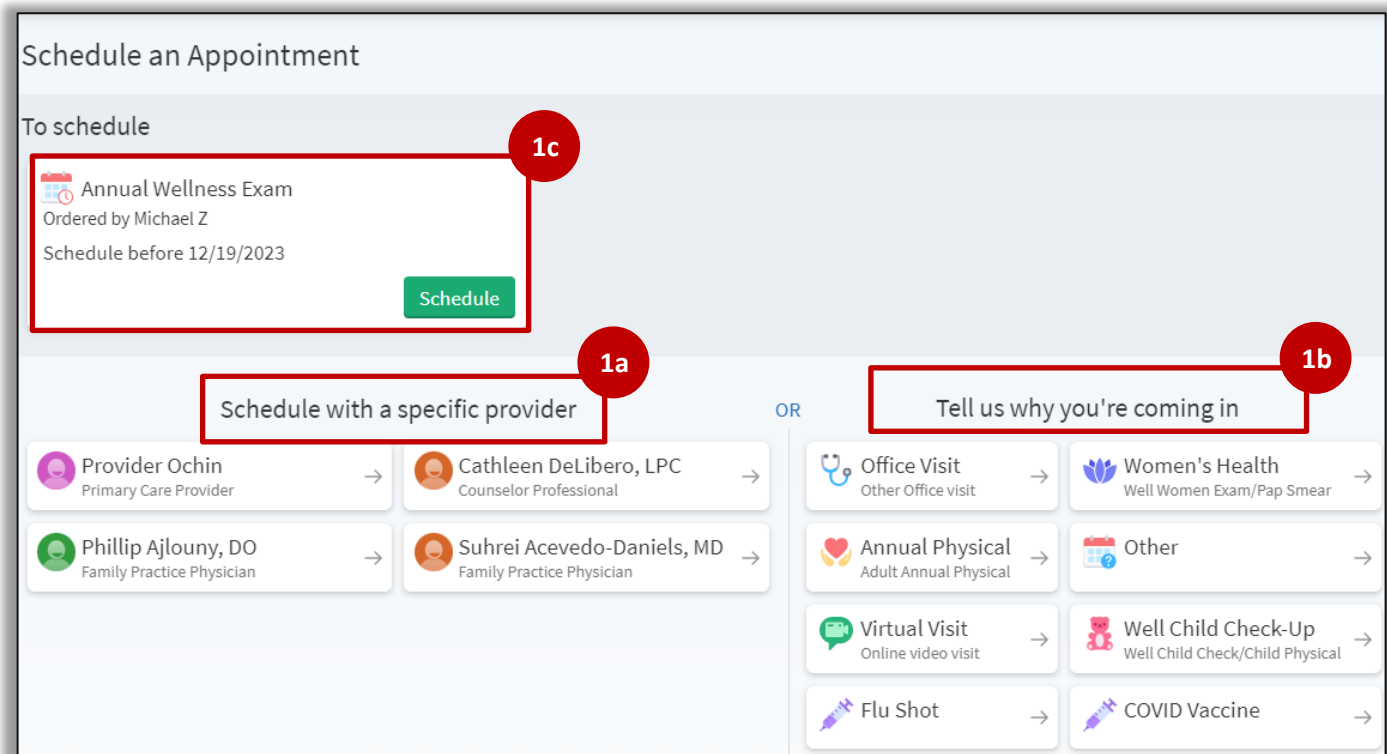
Patients who do not meet the qualifications receive a message displaying "There was a problem placing your application. Please contact your local social services office for assistance."

Schedule an Appointment

If any provider seen in the last two years is schedulable on MyChart, select the **Schedule an Appointment** button from the Home page.



1. The '**Schedule an Appointment**' function in MyChart has filters that allow patients the options to schedule:
 - a. With a specific provider.
 - b. By visit reason.
 - c. If a provider has ordered an appointment for the patient to schedule.



- From this screen, the patient can either select a specific provider or can use the provider filters by selecting a visit type. Once they select a visit type they are presented with a list of providers (with whom they have a relationship) that have schedules available.
- Additional filtering options are listed on the sidebar. The patient can select the gender, Language, provider type, and date and time they prefer, and the results are filtered automatically.
- If the patient wants to start over there is a red '**Start over**' button available for them to select.

The screenshot shows the 'Schedule an Appointment' interface. At the top, there are tabs for 'Reason for visit' (Women's Health), 'Locations' (OCHIN PRIMARY CARE), 'Time', and 'Verify and schedule'. A red circle with the number '4' highlights a 'Start over' button in the top right corner. Below the tabs, there are buttons for 'In Person' and 'Telephone'. A red circle with the number '2' highlights a grid of appointment times for 'Tuesday August 9, 2022' for two providers: 'Tevor Gamble' and 'Laura Qa-Bunsen, MD'. A red circle with the number '3' highlights the 'Search Criteria' sidebar on the right, which includes options for 'Providers: Any provider', 'Start search on: 08/09/2022', 'Refine Search' with 'Gender' (Female, Male) and 'Language' (English, Arabic, Chinese) filters.

- If the patient selects a provider first, they are presented with the '**What kind of appointment are you scheduling?**' (**Reason for visit**) screen. Once the kind of appointment is selected, the times that the provider has available are shown, and only date filtering is offered.

The screenshot shows the 'What kind of appointment are you scheduling?' screen. At the top, there are tabs for 'Providers' (Provider Ochin), 'Reason for visit', 'Locations', 'Time', and 'Verify and schedule'. A red circle with the number '5' highlights a grid of appointment types: 'Office Visit' (Other Office Visit), 'Women's Health' (Well Women Exam/Pap Smear), 'Annual Physical' (Adult Annual Physical), 'Other', 'Virtual Visit' (Online video visit), and 'Well Child Check-Up' (Well Child Check/Child Physical). A red circle with the number '5' highlights the 'Start over' button in the top right corner.

6. A 'What time works for you?' prompt screen is shown to the patient where they can select the time they would like to be seen.

Schedule an Appointment

✓ Providers Edit
Laura Qa-Bunsen, MD

✓ Reason for visit Edit
Annual Physical

✓ Locations Edit
OCHIN PRIMARY CARE

🕒 Time

What time works for you? 6

In Person Telephone

Tuesday August 9, 2022
Laura Qa-Bunsen, MD

3:00 PM 3:15 PM 3:30 PM 3:45 PM 4:00 PM

Wednesday August 10, 2022
Laura Qa-Bunsen, MD

7:00 AM 2:00 PM 2:15 PM 2:30 PM 2:45 PM

7. Once the desired appointment is selected, click the "Schedule it" button to complete the appointment request.

OFFICE VISIT with Laura Zzzbunsen, MD

Monday August 15, 2022 8:30 AM (15 minutes) Edit

OCHIN PRIMARY CARE
1881 SW NAITO PARKWAY
PORTLAND OR 97201
608-839-7128

*What is the most important thing you want addressed during this visit?

There is a mole I would like you to check

Before scheduling...

☒ Join the wait list and be notified if earlier appointments open up

☒ Favorite this appointment to easily schedule again later

If everything looks correct, click the button below to schedule.

✓ Schedule it 7

When due for your influenza vaccine appointment, you can schedule from the MyChart Preventive Care activity.

Preventive Care

Preventive medicine plays an important part in your health and overall well-being. The following procedure is based on your age, sex, and medical history.

Overdue

Cholesterol Screening

Overdue

Learn more

Hide reminder from home page

Request appointment

Diabetes Screening

Overdue

Learn more

Hide reminder from home page

Request appointment

Breast Cancer Screening

Overdue

Learn more

Hide reminder from home page

Request appointment

Zoster, Recombinant Vaccine

Overdue

Learn more

Hide reminder from home page

Request appointment

Influenza (Flu) Vaccine

Overdue

Learn more

Hide reminder from home page

Mark as complete

Schedule

Falls Prevention

Learn more

Hide reminder from home page

Request appointment

You'll be able to schedule with a specific provider or select a reason from the available options to request an appointment.

Schedule an Appointment

Schedule with a specific provider

Provider Ochin

Primary Care Provider

Cathleen DeLibero, LPC

Counselor Professional

Phillip Ajlouny, DO

Family Practice Physician

Suhrei Acevedo-Daniels, MD

Family Practice Physician

OR

Tell us why you're coming in

Office Visit

Other Office visit

Women's Health

Well Women Exam/Pap Smear

Annual Physical

Adult Annual Physical

Other

Virtual Visit

Online video visit

Well Child Check-Up

Well Child Check/Child Physical

Flu Shot

COVID Vaccine

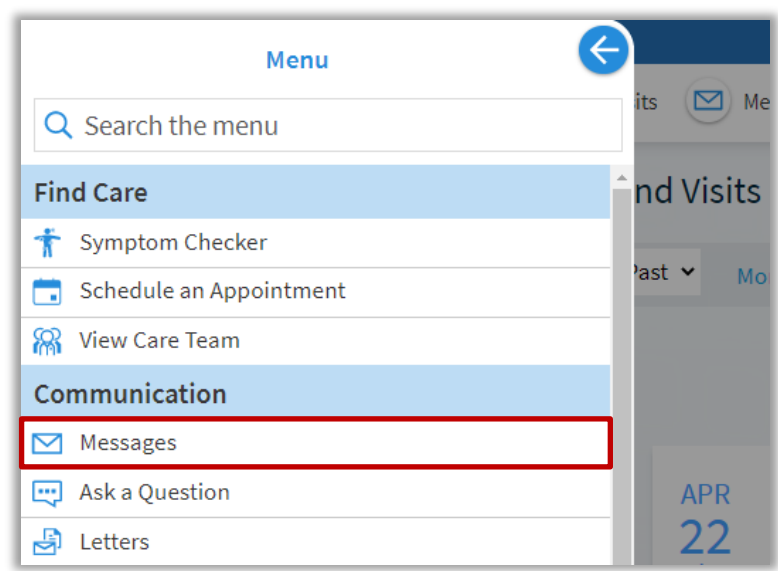
E-Visits

© 2024 OCHIN. This material contains confidential and copyrighted information of Epic Systems Corporation.

Page 21 of 36

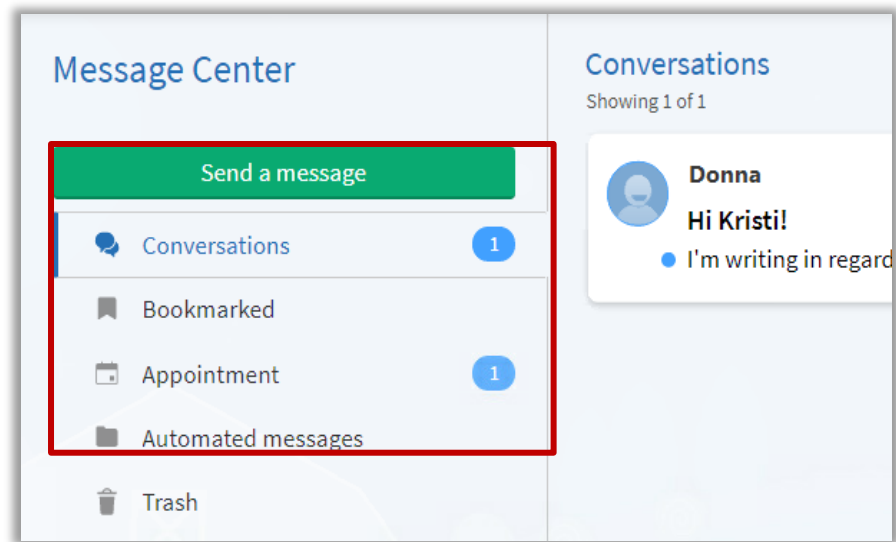
Messaging

You can read any messages sent by your doctor or other clinic staff by going to your Message Center.



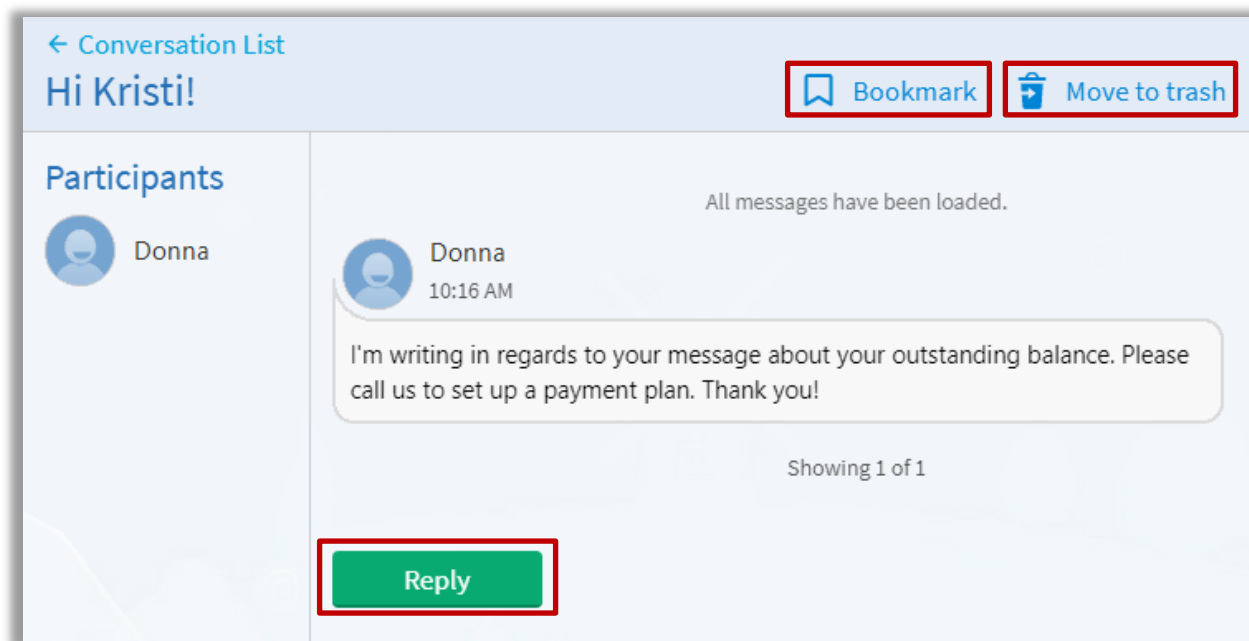
The Message Center includes five folders, displayed on the left sidebar:

- The **Conversations** folder is the primary folder and includes messages between you and your care team or other clinic staff.
- The **Bookmarked** folder includes conversations flagged for easy access in the future.
- The **Appointment** folder includes appointment reminders and confirmations.
- The **Automated Messages** folder includes system messages automatically sent to and from your account, like payment confirmations and questionnaire submissions.
- The **Trash** folder includes any conversations you've deleted from your main folders.



View a Message

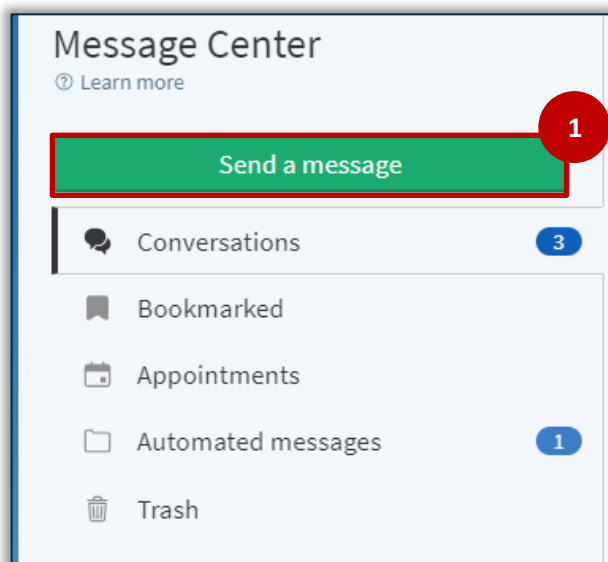
- Click a message from the Conversation List to view the details of the message.
- Click the **Reply** button to respond to the message.
- To flag a conversation for easy access in the future, click **Bookmark**. The conversation is flagged and appears in the Bookmarked folder.
- Click **Move to trash** to remove the conversation from the Conversation List.



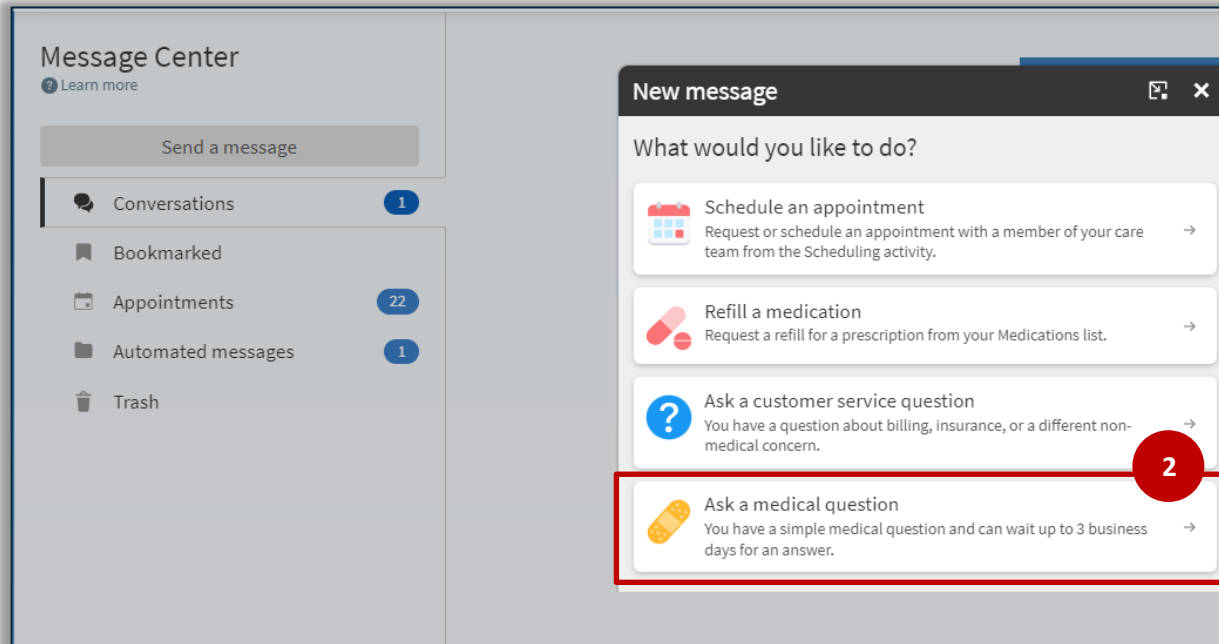
Upload Pictures or Documents

Patients can upload pictures and documentation to MyChart by attaching them to a MyChart Medical Advice Request Message.

1. From the Message Center, click on the **Send a message** button.



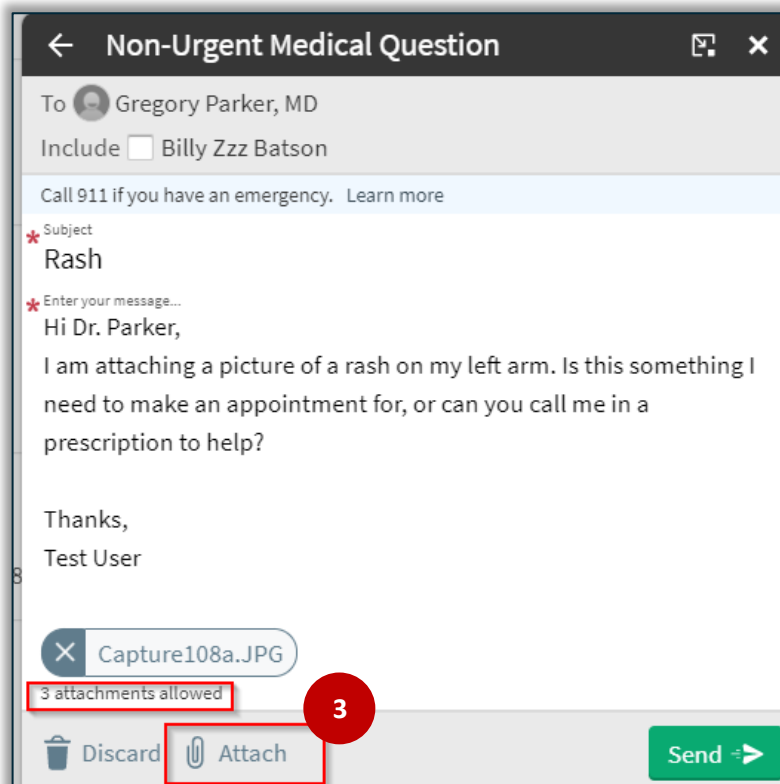
2. Click **Ask a medical question**.



3. Click the **Attach** button and upload pictures or documents.



Patients may upload three items per message. The allowed file types for attached images, patient photo, and document uploads are as follows: **GIF, JPG, PNG, TIFF, BMP, PDF** with a limit size of 11MB and for video files **MP4, MOV, MPG** with a limit size of 65MB.



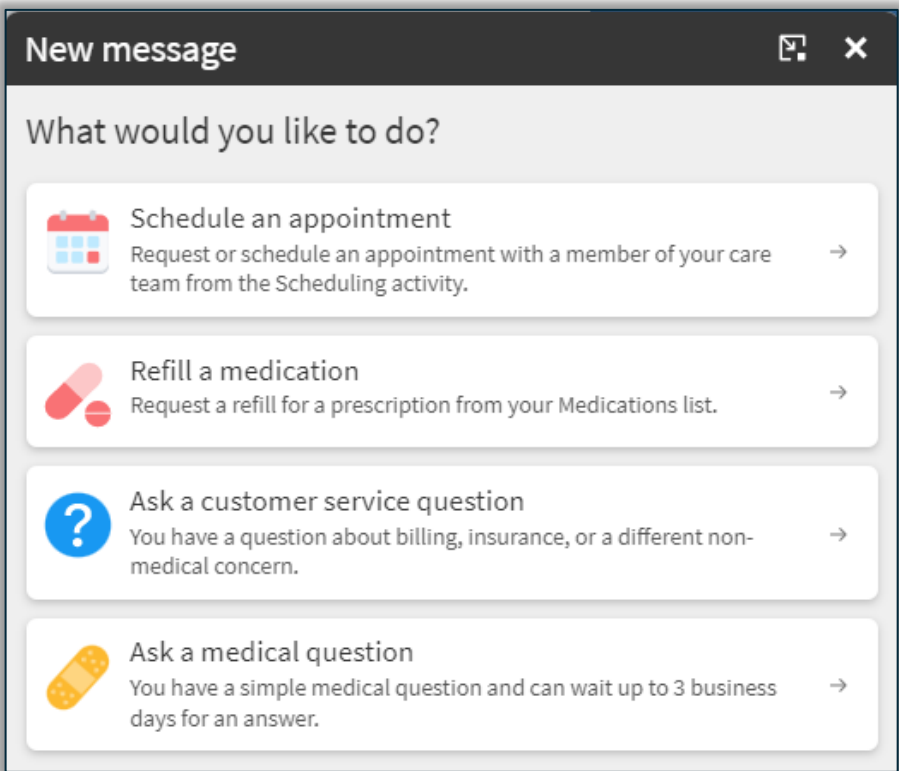
Send a Message

If you have a non-urgent medical question, you can send a message to your care team by clicking **Send a Message** above the folder list.

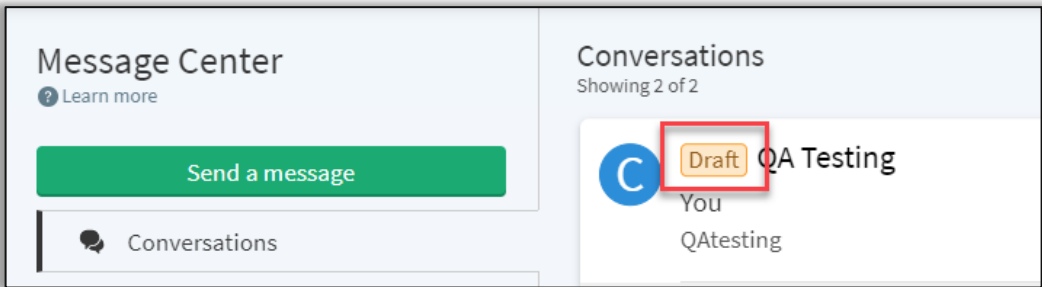
MyChart messages are secure, meaning your information stays private as it is sent over the Internet.

When sending a new message, select the option that matches your question:

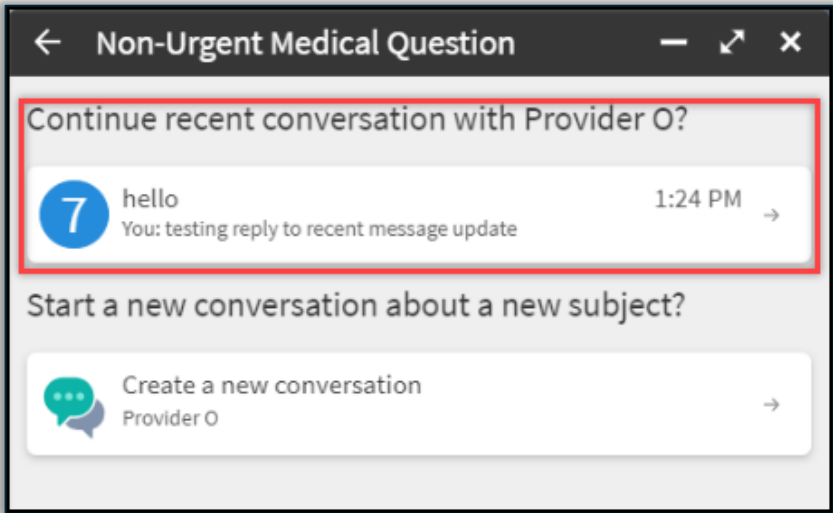
- **Medical Question:** allows you to send a message about non-urgent medical concerns, prescriptions, test results, and visit follow-up questions.
- **Customer service question** allows you to send a message about billing, insurance, referrals, website issues, or complaints.



If you are interrupted while composing a message in the Message Center before you have a chance to send it, the draft is now automatically saved allowing you to return to it later.

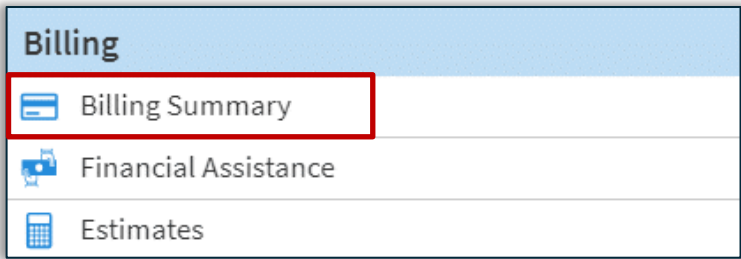


In addition, Medical Advice Requests from MyChart display a continue recent conversations option when a patient selects the same message type and provider within the past five days of a new conversation.

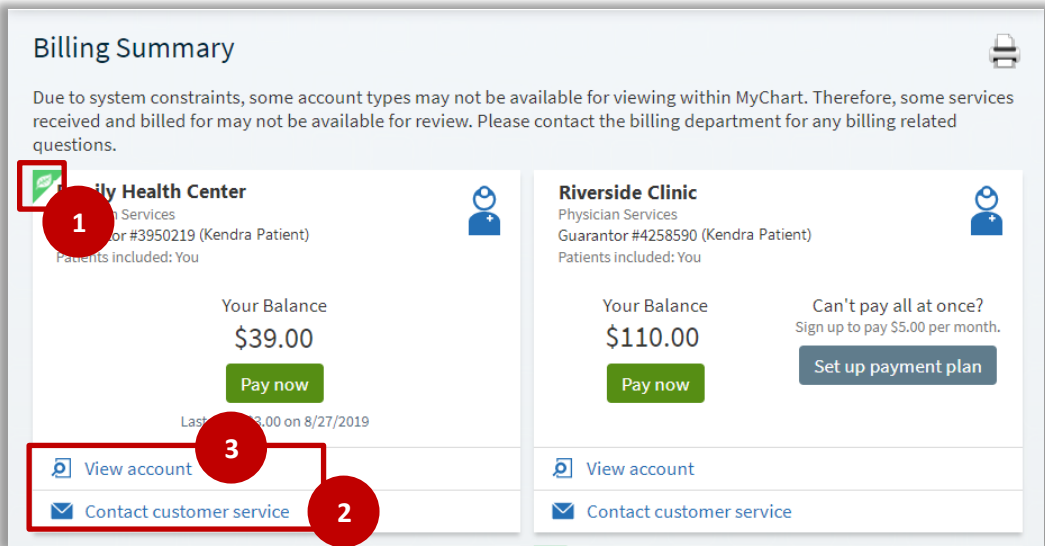


Billing and Insurance

You can see the outstanding balance for any of any accounts in the **Billing Summary**.



- 1. Accounts signed up for paperless billing are shown with the  leaf icon.
- 2. If you have a question about the balance or other information for a billing account, you can use the **Contact customer service link** to send a message.
- 3. To view additional information about an account, including past statements, click the **View account** hyperlink.



4. The account **Overview** tab will display any current Balances and/or Recent Payments.

Billing for Duck Ochindaisy
Physician Services for Guarantor #6313760

Overview Details Payments Communications

Balances

Amount Due
\$0.00

\$20.00 of your payments has not yet been applied to your balance

Recent Payments

Oct 25 2021 Co-Pay Payment (Cr Acc)
\$20.00 Cash

5. The **Details** tab will display all **Active accounts**.

6. You can view accounts with or without balances, and filter for a specific **Date range**.

Billing for Duck Ochindaisy
Physician Services for Guarantor #6313760

Overview Details Payments Communications

Visit Accounts View all details

Currently viewing: Active accounts

Active accounts Year to date Last year **Date range**

From To 01/17/2024 Apply

Make a Payment

Click **Pay now** for the account you want to make a payment towards.

Family Health Center
Physician Services
Guarantor #3950219 (Kendra Patient)
Patients included: You

Your Balance
\$39.00

Pay now

Last paid: \$3.00 on 8/27/2019

[View account](#)

[Contact customer service](#)

- Enter the amount to pay along with your credit card or bank account information.
- Review your payment information and click **Submit**.

Account Payment for Kendra Patient

Guarantor #3950219



You're almost done!

Please verify that the information below is correct before processing your payment.

Payment amount

\$110.00

Account #3950219

Address

469 Example Ln
Sacramento, California 94207

Payment method

Kendra Patient
x4444
exp. 03/2024

Back

Submit

Cancel

Back to Billing Summary

Set up a Payment Plan

If you can't pay your whole bill at once, some organizations may allow you to set up a payment plan to automatically pay a small amount each month.

Riverside Clinic

Physician Services

Guarantor #4258590 (Kendra Patient)

Patients included: You



Your Balance

\$110.00

Pay now

Can't pay all at once?

Sign up to pay \$5.00 per month.

Set up payment plan

 View account

 Contact customer service

- Select the **monthly amount** and **payment day**.
- Click select payment method to enter your credit card information.

Sign Up for a Payment Plan

If you need to end your plan, you will need to call us or send a message to customer service.

Choose a monthly amount

How much do you want to pay per month towards your balance of
\$ 110.00 ?

On which day of the month would you like
your payments to be made?

\$10.00

15

This monthly amount will require you to make **11** payments until you pay off your balance in **April 2022**.

Select payment method

Cancel

Back to Billing Summary

Sign Up for Paperless Billing

From the Billing Summary page, click **Paperless Preferences**.

- Verify your email address.
- Links to Personal Information and Communication Preference pages are available to edit contact information and billing notification preferences.

Menu
OCHIN MyChart
MyChart by Epic
A Aeson

← Billing Summary

Paperless Preferences

Save paper and manage your accounts more easily with paperless billing.

Contact information

Email
mazonn@ochin.org

Mobile phone
304-685-1637

[Review contact information](#)

Save changes

Paperless billing

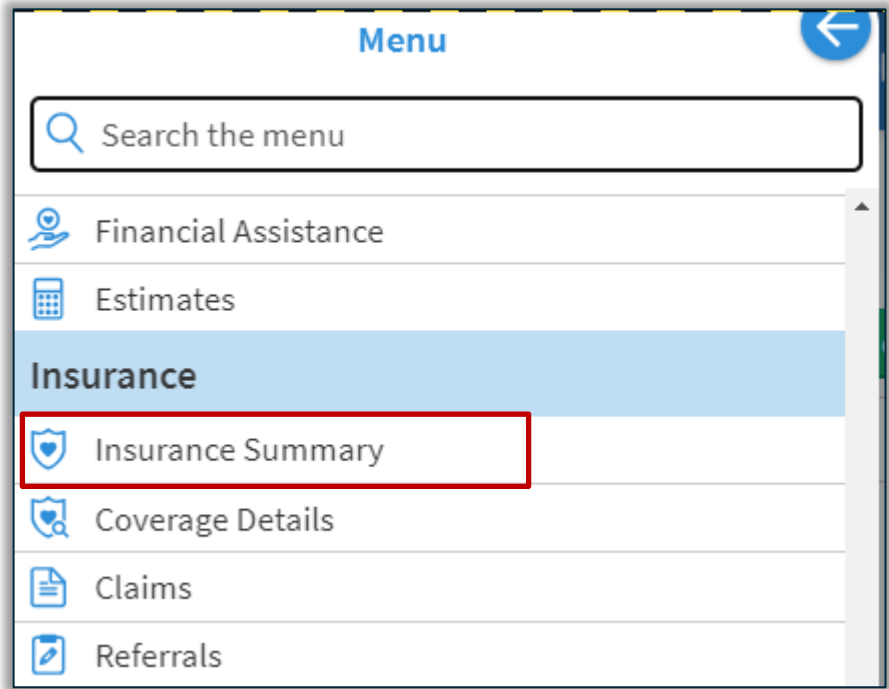
If you sign up for paperless billing, you are opting to receive billing communications electronically. You will be notified of new statements and letters based on your communication preferences. You will still receive bills via mail from locations that do not have paperless billing.

[Review billing notifications](#)

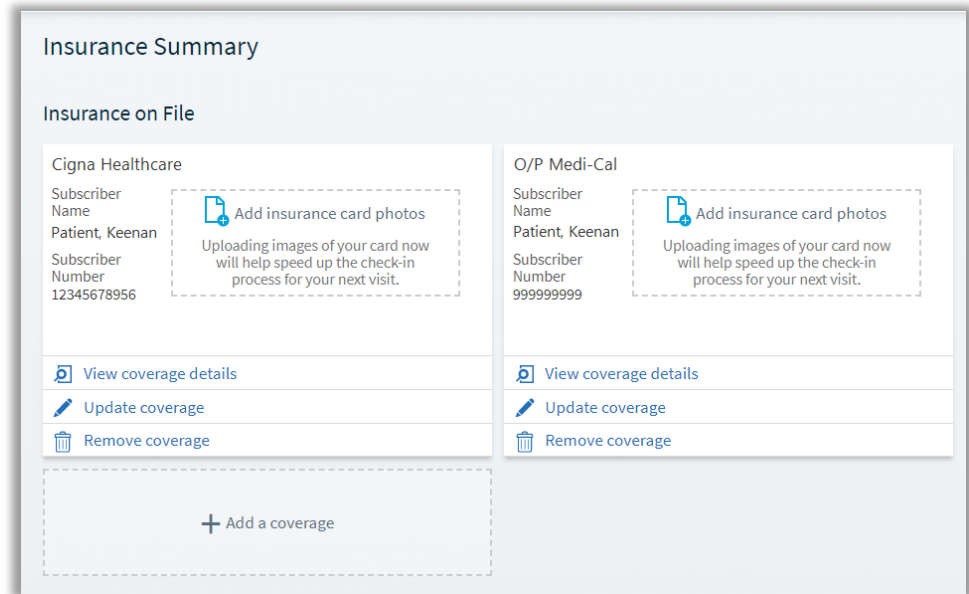
☒

Update Insurance Information

You can review the insurance information your clinic has on file from the Insurance Summary.

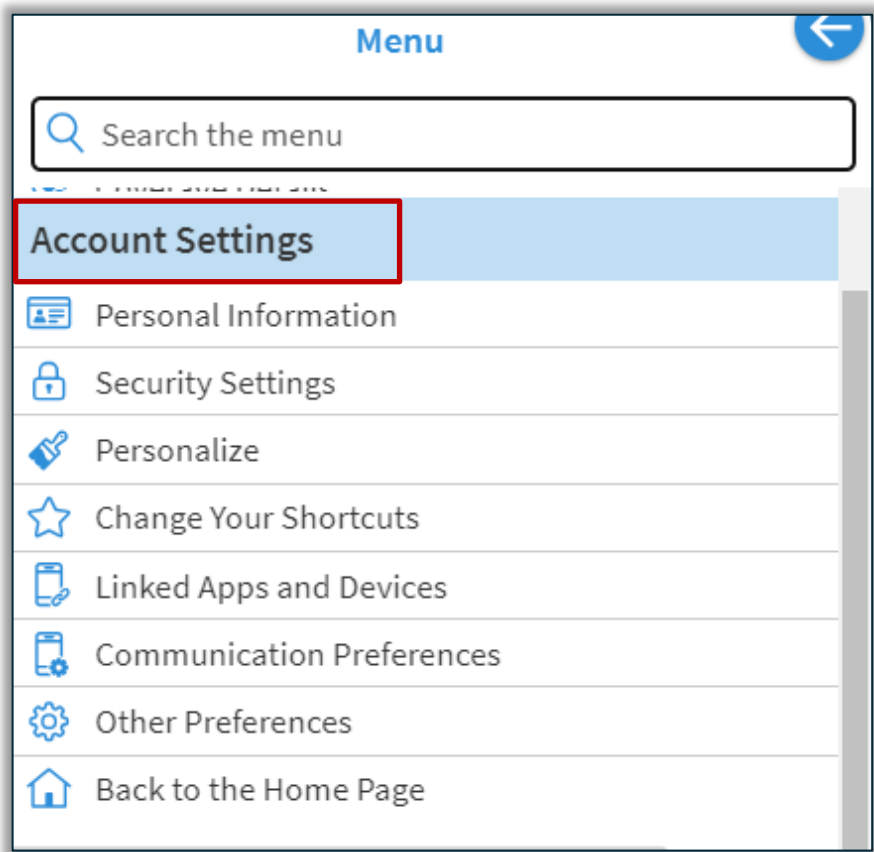


- Click **View coverage details** for the payer or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.
- Click **Update coverage** to request a change to an existing coverage.
- Click **Remove a coverage** to request it be removed.
- Click **Add a new coverage** to submit a plan for verification when you log out of MyChart.



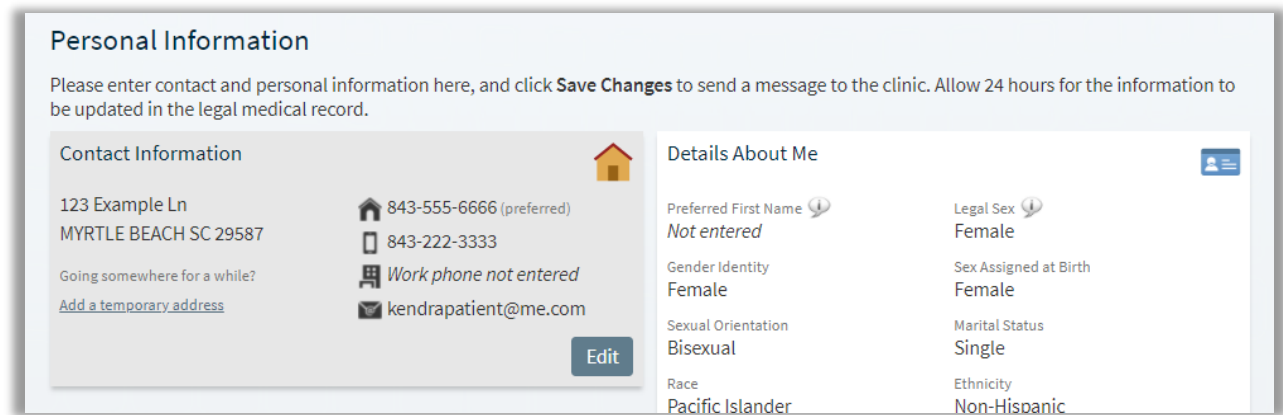
Manage Your Account

The Account Settings menu item contains activities to help you manage your MyChart Account.



Personal Information

This activity allows you to update your contact information and emergency contacts.



Security Settings

You can change your password or turn on two-step verification.

Menu

OCHIN MyChart

MyChart by Epic

A Arya

?

Security Settings

Change Password

Your password must be different than your MyChart Username. For increased security, use a combination of numbers and letters (lowercase and uppercase).

* Current Password:

* New Password:

* Confirm New:

Save password

Two-Step Verification Settings

Two-step verification is an additional level of security to help keep your account secure even if someone has your password.

Verify with email or text message

Disabled

We will send you an email or text message when you log in with a code to verify your identity.

→

Verify with an authenticator app

Disabled

Use a code from a downloaded authenticator app when you log in to verify your identity.

→

Personalize

Use this activity to change your photo, add a nickname, or use a different color scheme.

Personalize

Whose Records Can I View?

Photo

Account Name

Nickname

Access Until

Color Scheme



Kendra Example

Kenzie

14 of 20 characters left

This is your own MyChart account.

Skylight

Save

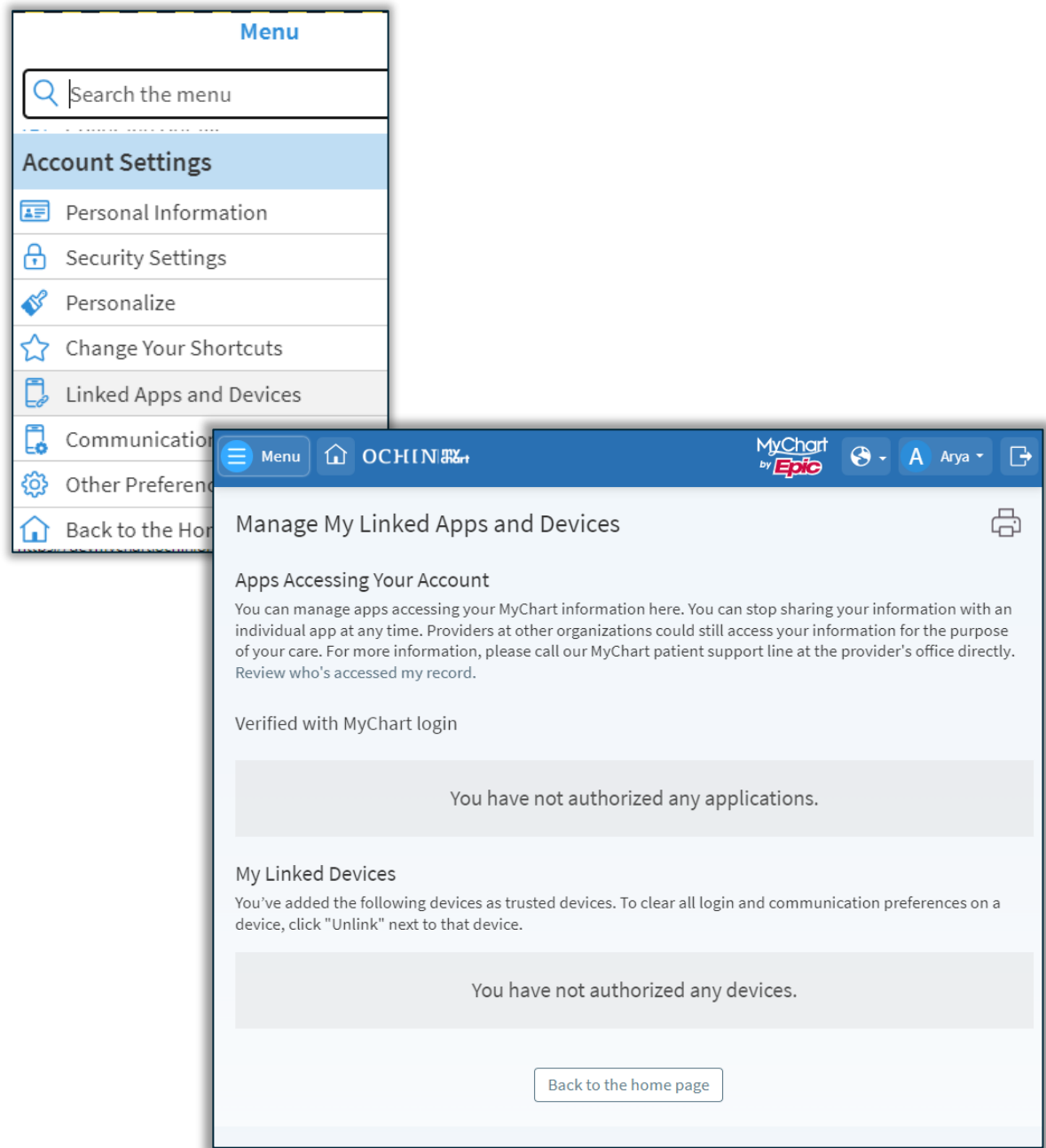
Cancel

© 2024 OCHIN. This material contains confidential and copyrighted information of Epic Systems Corporation.

Page 32 of 36

Linked Apps and Devices

This activity and corresponding menu item are available to all patients and proxies.
Path: **MyChart > Menu > Linked Apps and Devices.**



Communication Preferences

You can change the type of messages and notifications you receive for test results, billing statements, and other notifications.

For each type of notification listed, click the icon to choose if you want to be notified by Email, Text, a phone call, or paper mail.

Communication Preferences

Choose how you would like to receive MyChart notifications. You can manage your settings for push notifications on your mobile device.

EmailTextCallMail

✓Appointments

Alerts and notifications about upcoming or past appointments.

EmailTextCallMail

✓Messages

Receive updates from your healthcare organization.

EmailTextCallMail

^Health

Notifications when new information is available about your care.

End-of-Life Planning

Medical Document Request

Prescription Ready

Research Study Invitation

Test Result

EmailText

✓Billing

Updates about billing and insurance information.

EmailTextMail

✓Questionnaires

Alerts when questionnaires are available or due.

Email

✓Account Management

Receive alerts about account updates.

EmailText

✓Telehealth

Alerts for current telehealth visits

EmailText

Save changes

MyChart Sharing Hub

The MyChart Sharing Hub **Menu>Sharing>Sharing Hub** allows patients to share their health information with a family member, close friend or caretaker, a health care provider (dentist, nurse, or social worker), or a healthcare organization, and even share information with other organizations like their insurance company or workplace.

Menu

OCHIN MyChart

MyChart by Epic

Share

Sharing Hub

There are many ways to share your health information. Let us help you find what you need.

Who do you want to share your health information with?

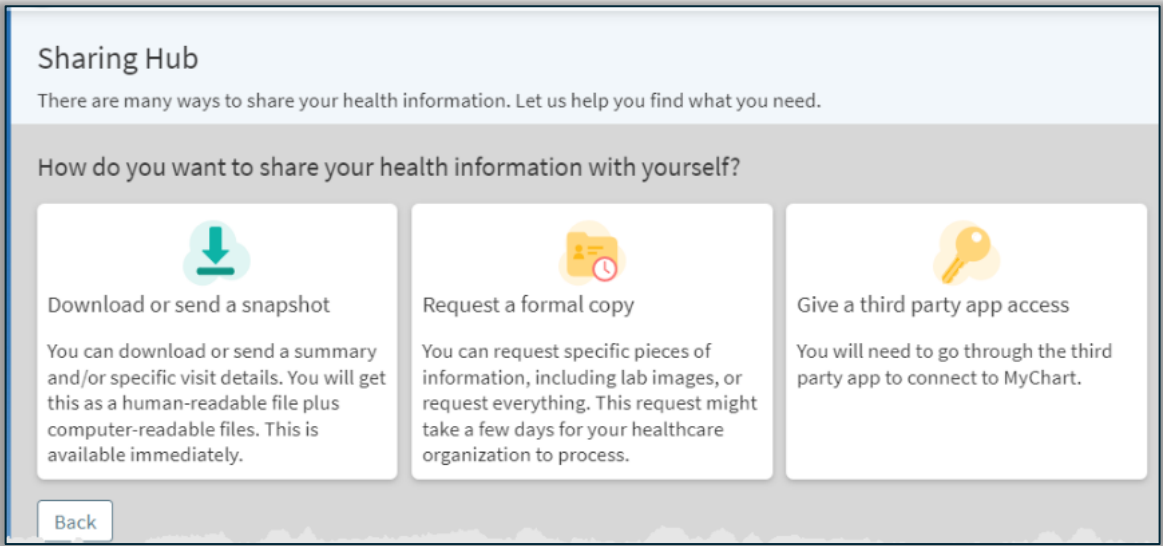
© 2024 OCHIN. This material contains confidential and copyrighted information of Epic Systems Corporation.

Page 34 of 36

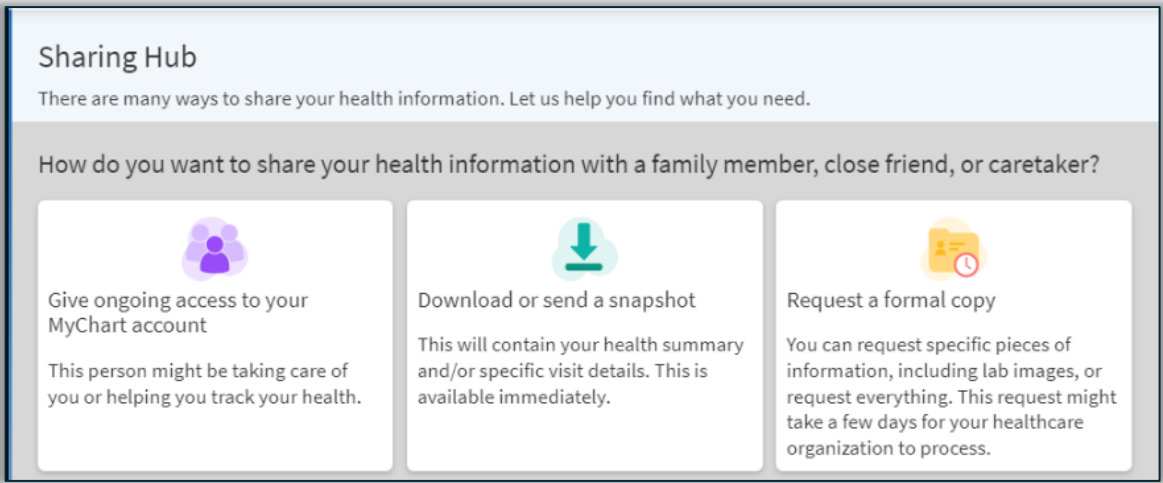
The Sharing Hub offers patients large buttons (cards) to select who and how they would like to share their health information and can select from: 'Yourself', 'A family member, close friend or caretaker', 'A healthcare provider', or 'Anyone else'.

Selecting the **'Yourself'** button displays more options:

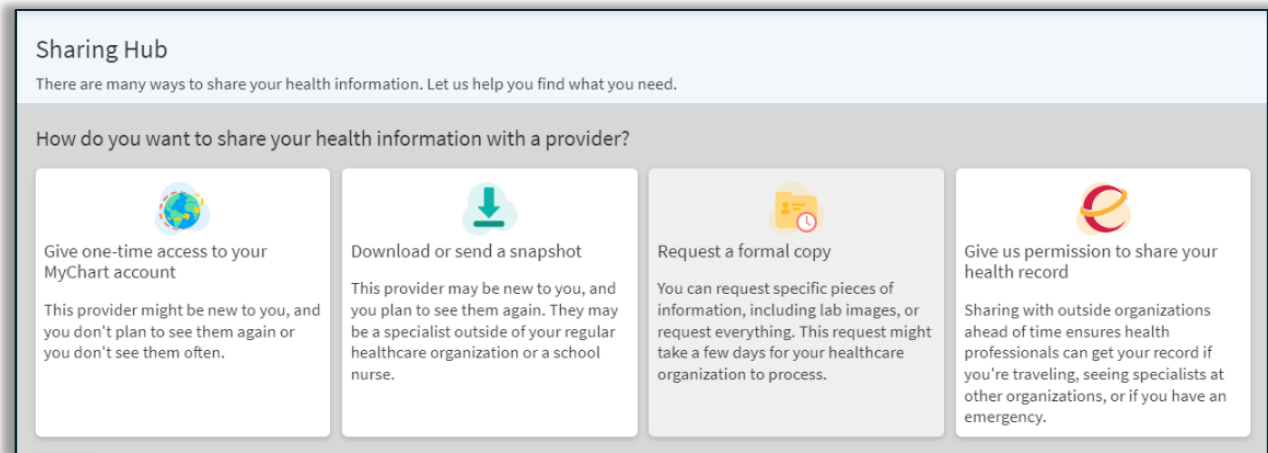
- Download or send a snapshot.
- Request a formal copy.
- Give a third-party app access.



- **'A family member, close friend, or caretaker'** displays more options:
 - Give ongoing access to your MyChart account.
 - Download or send a snapshot.
 - Request a formal copy.



- **'A healthcare provider'** displays more options:
 - Give one-time access to your MyChart account..
 - Download or send a snapshot
 - Request a formal copy.
 - Give us permission to share your health record.



- **'Anyone else'** displays more options:
 - Download or send a snapshot.
 - Request a formal copy.
 - Give a third-party app access.

