OCHIN

A driving force for health equity

MAKE THE MOST OF MYCHART

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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.

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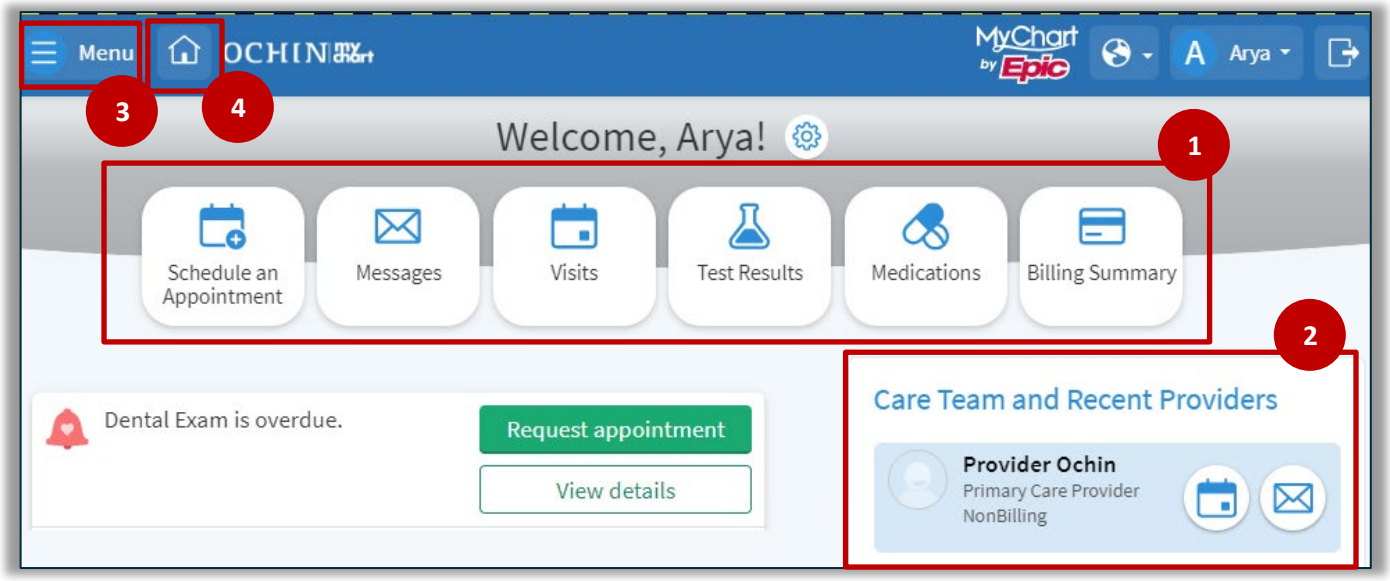

Making the Most of MyChart User Guide

From **Menu**:

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

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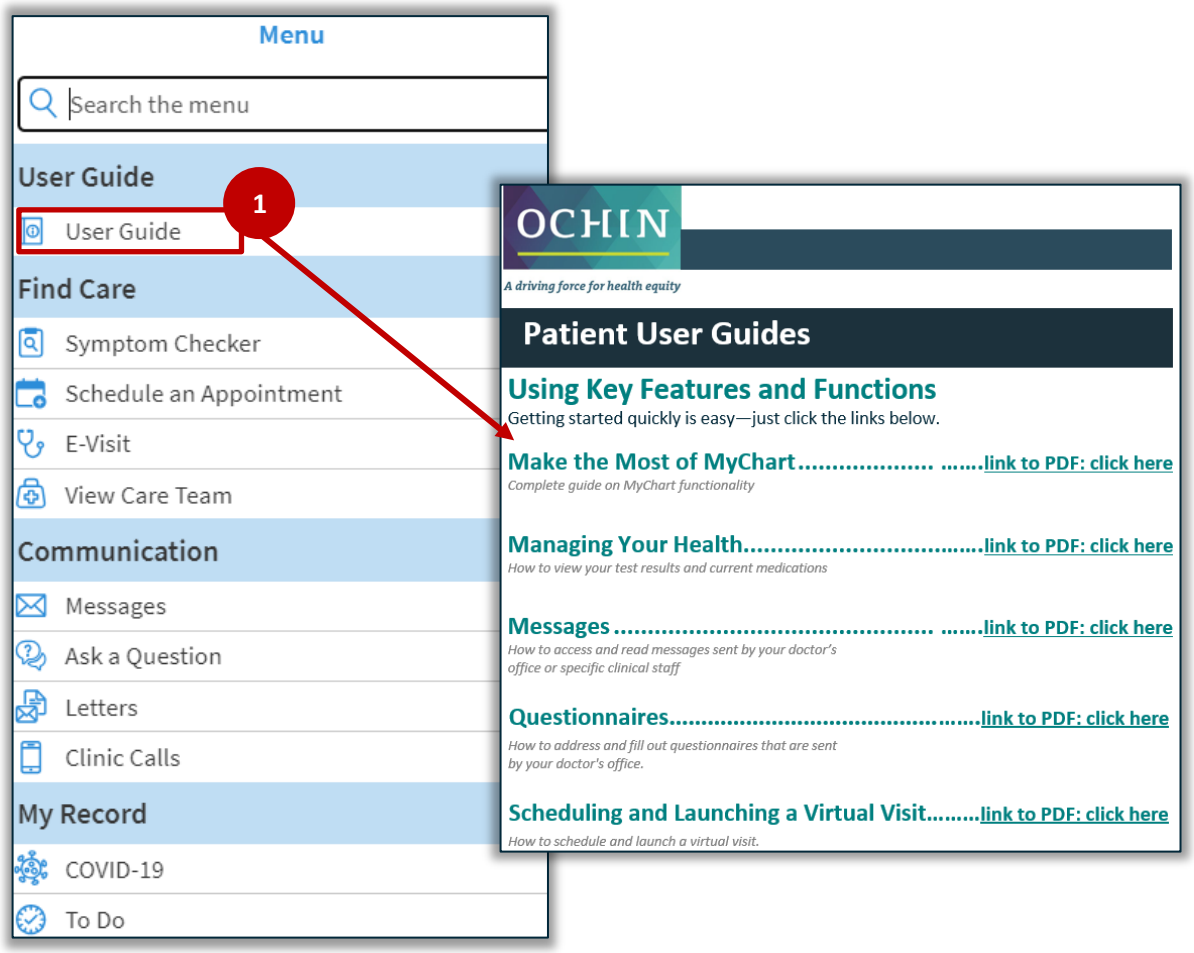
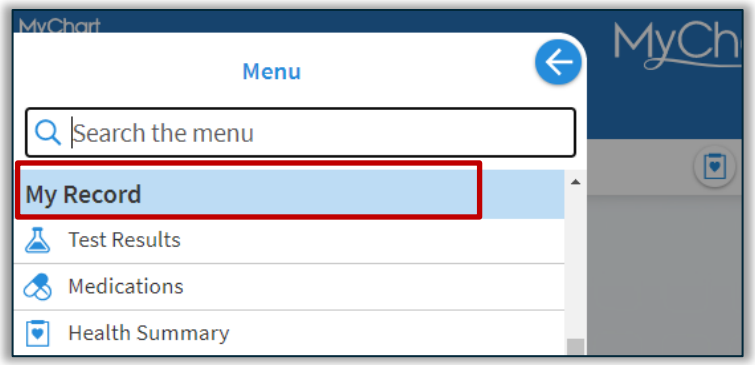


Manage a Patient's Health

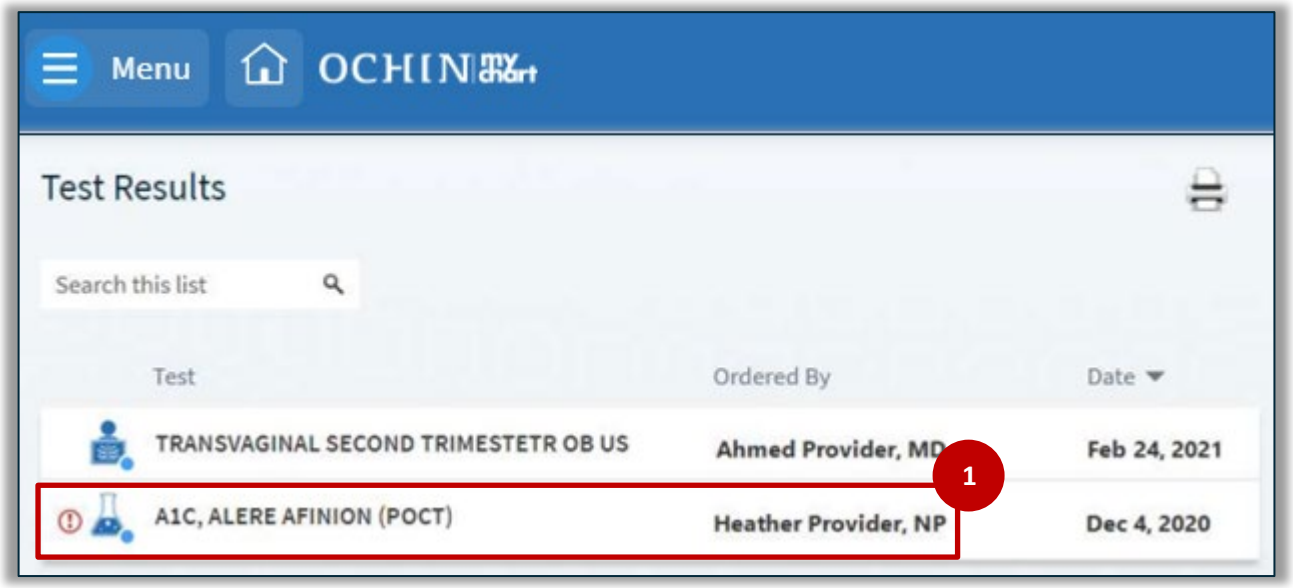
The health information is under the **My Record** section of the Menu. Select an option from the menu to see more details.



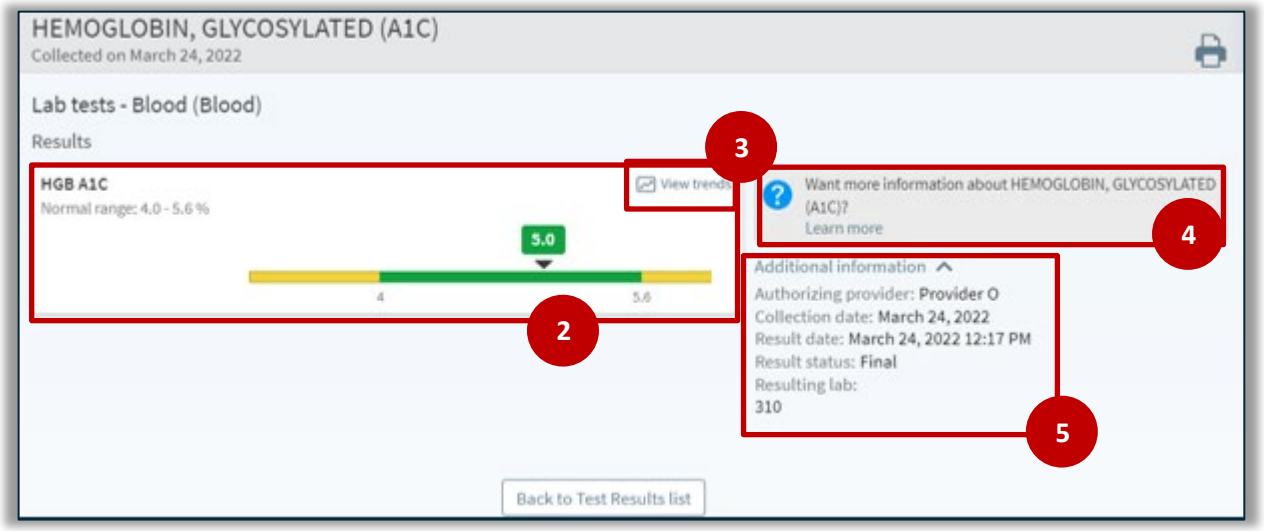
Test Results

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.



6. Providers who are set up to receive messages in response to test results will have a **Ask a question** button available for the patient.

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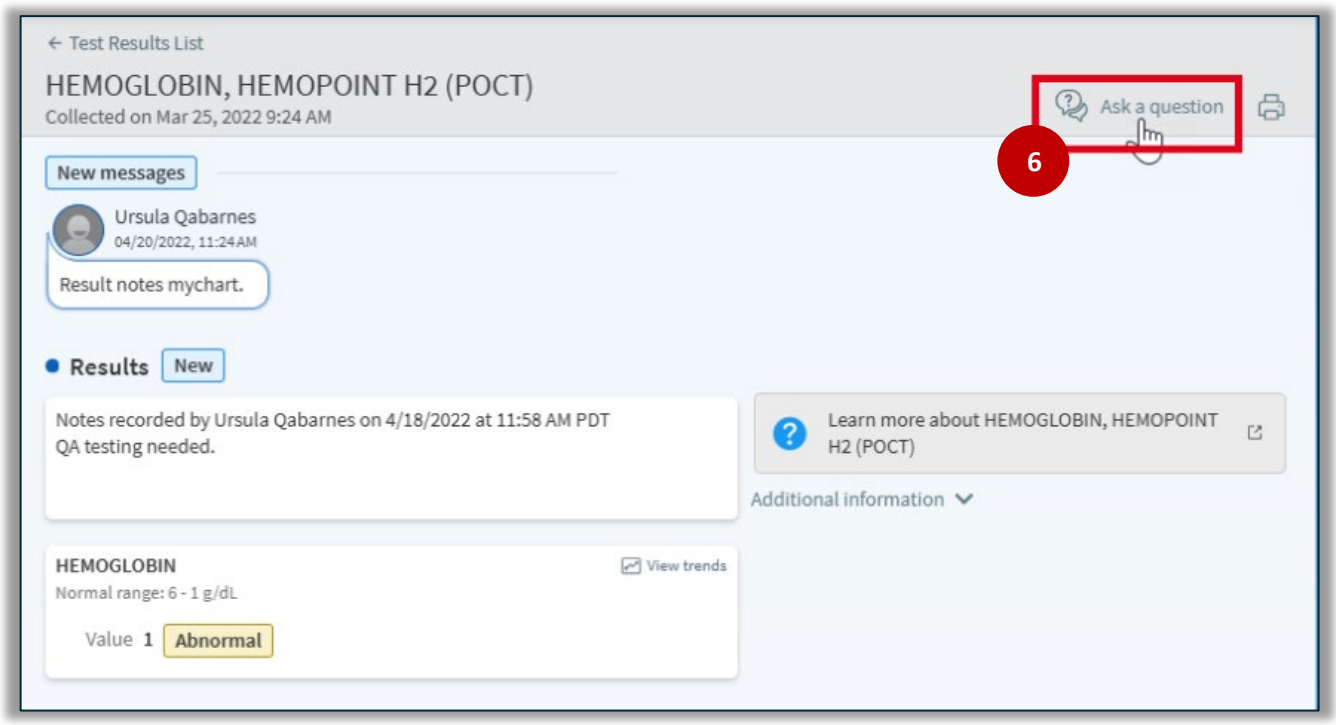
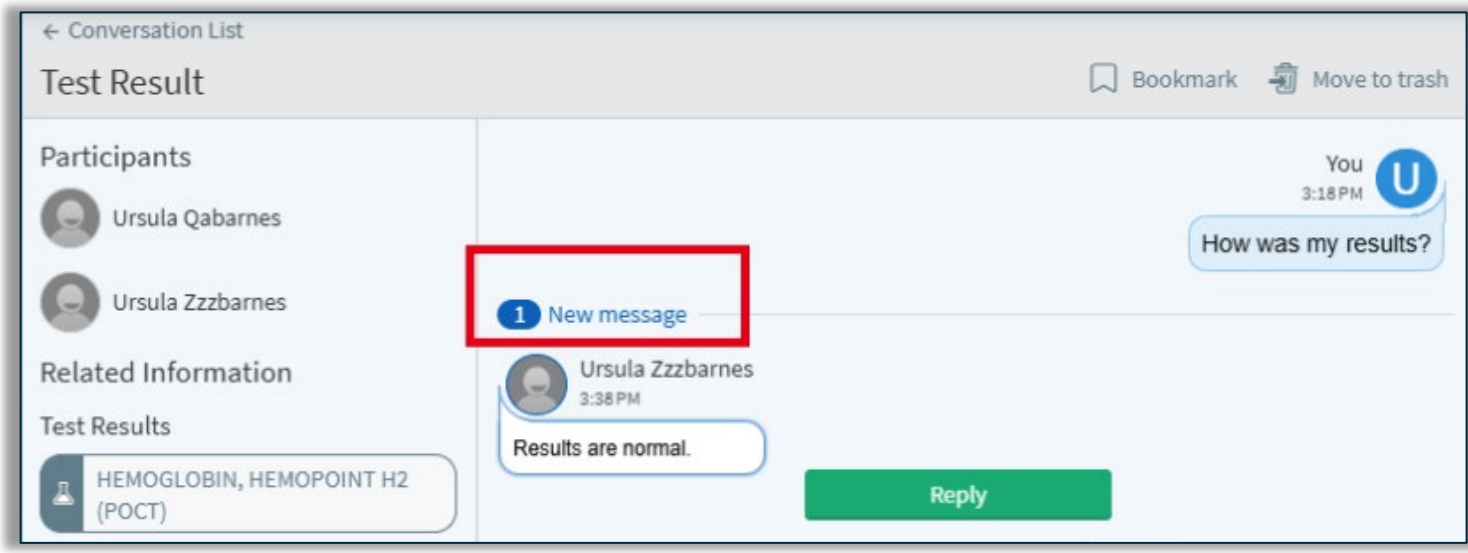
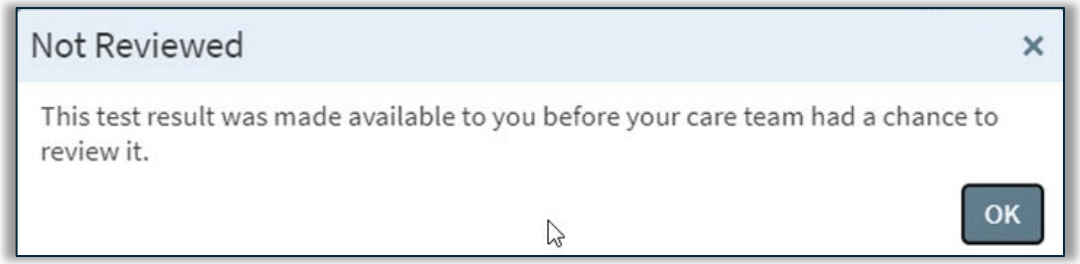


7. Responses to questions will attach to the result and be available under the Messages Activity.



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



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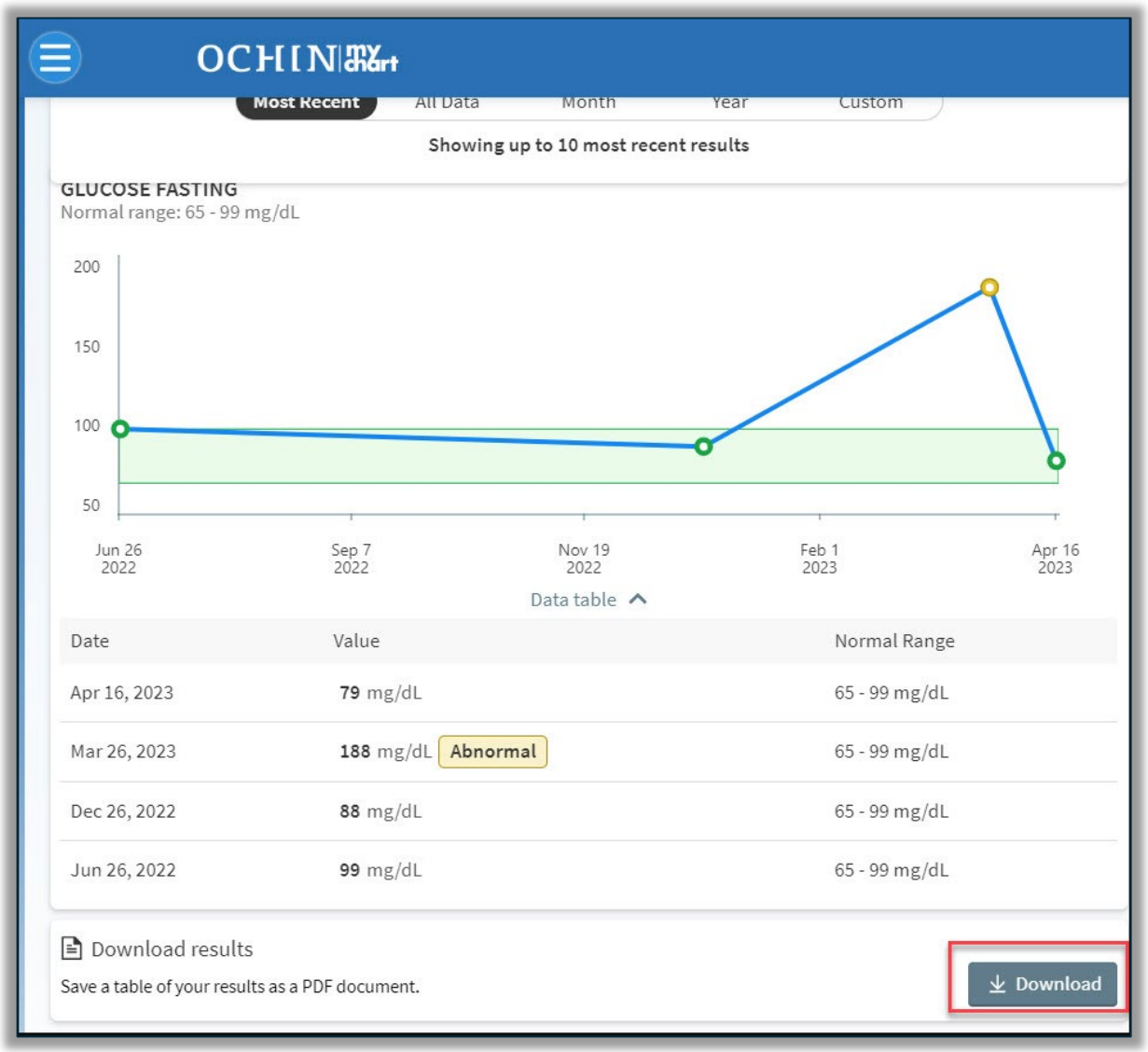
8. MyChart Test Results **Download** button downloads the patient's last 75 test results as a PDF document and displays results in a trending graph with data table below graphs. Test results from outside sources using Happy Together display as part of the last 75 test results.

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

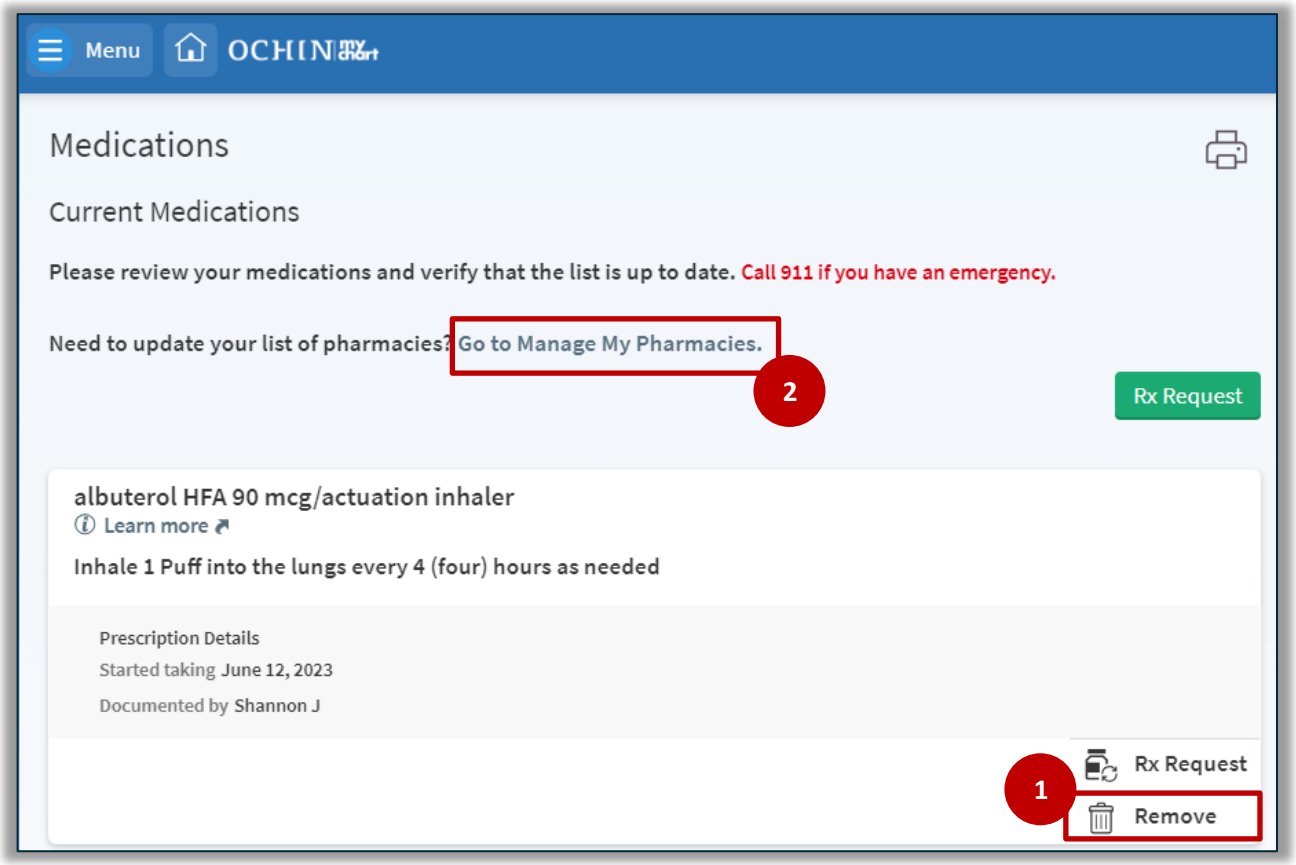


Medications

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.**



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).

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.

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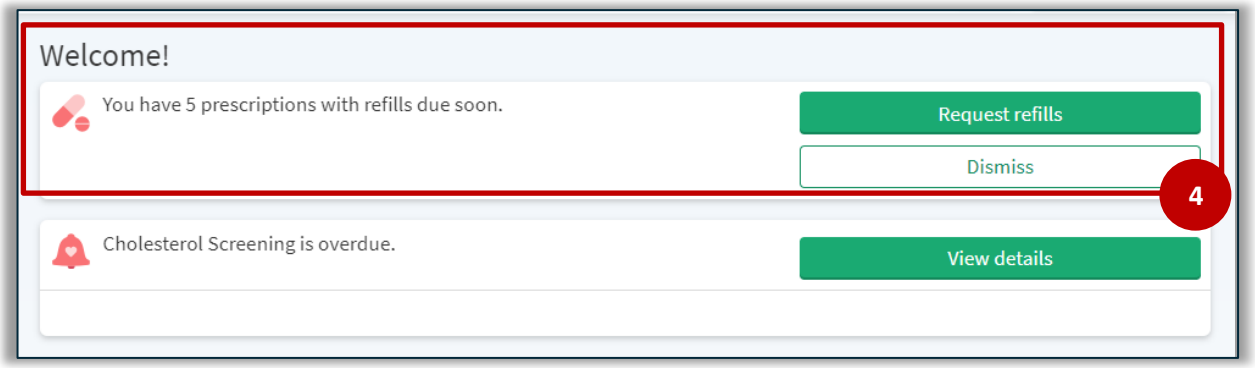
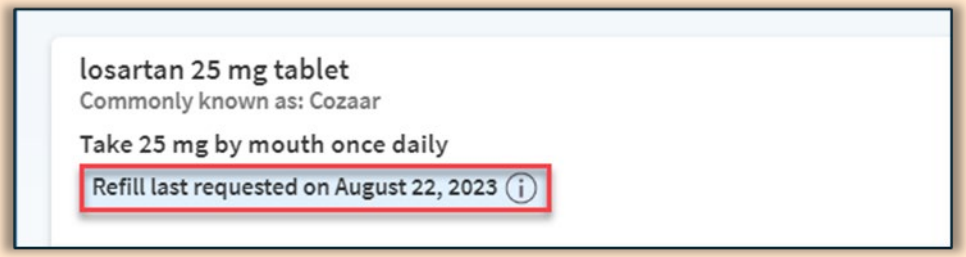
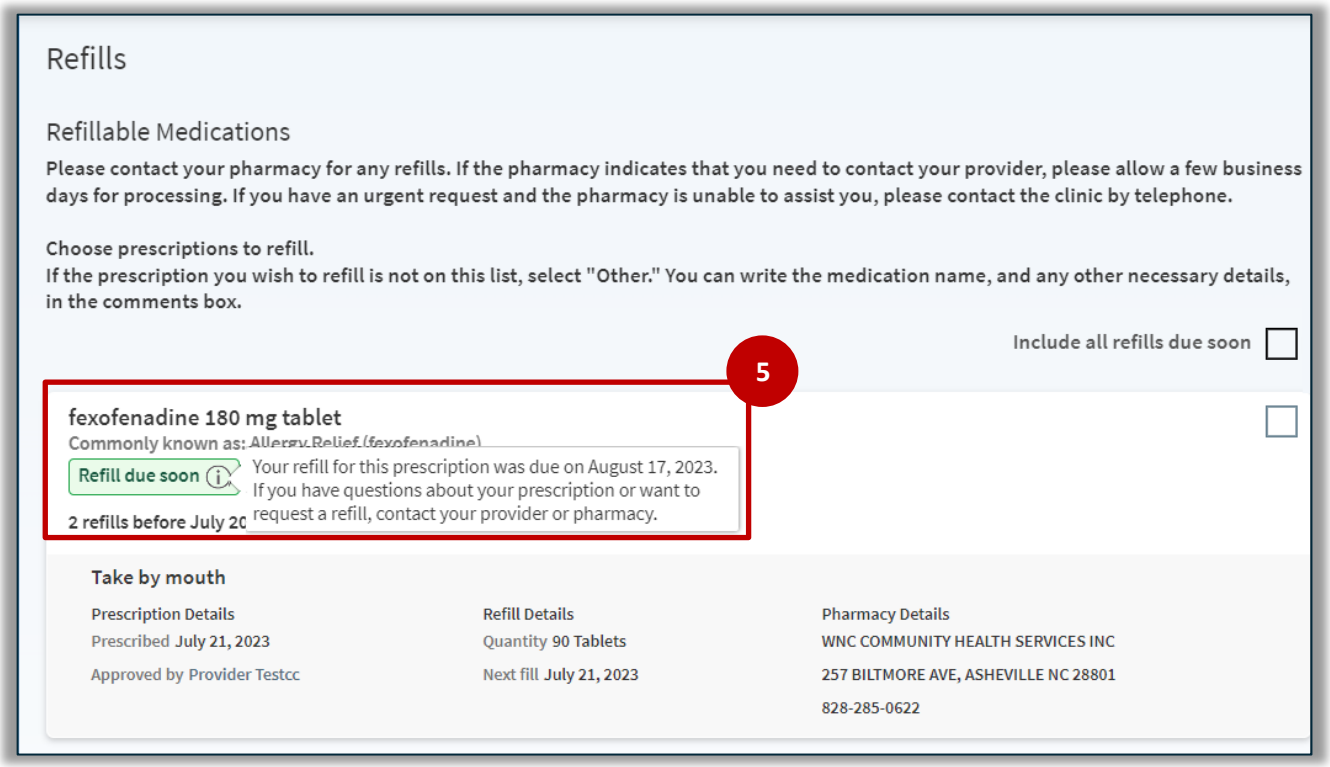


5. Each medication that has a refill due soon has its own badge with the expected refill date in the tooltip.

Refill requests in MyChart have a 48-hour wait time before patients can submit a duplicate request.





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

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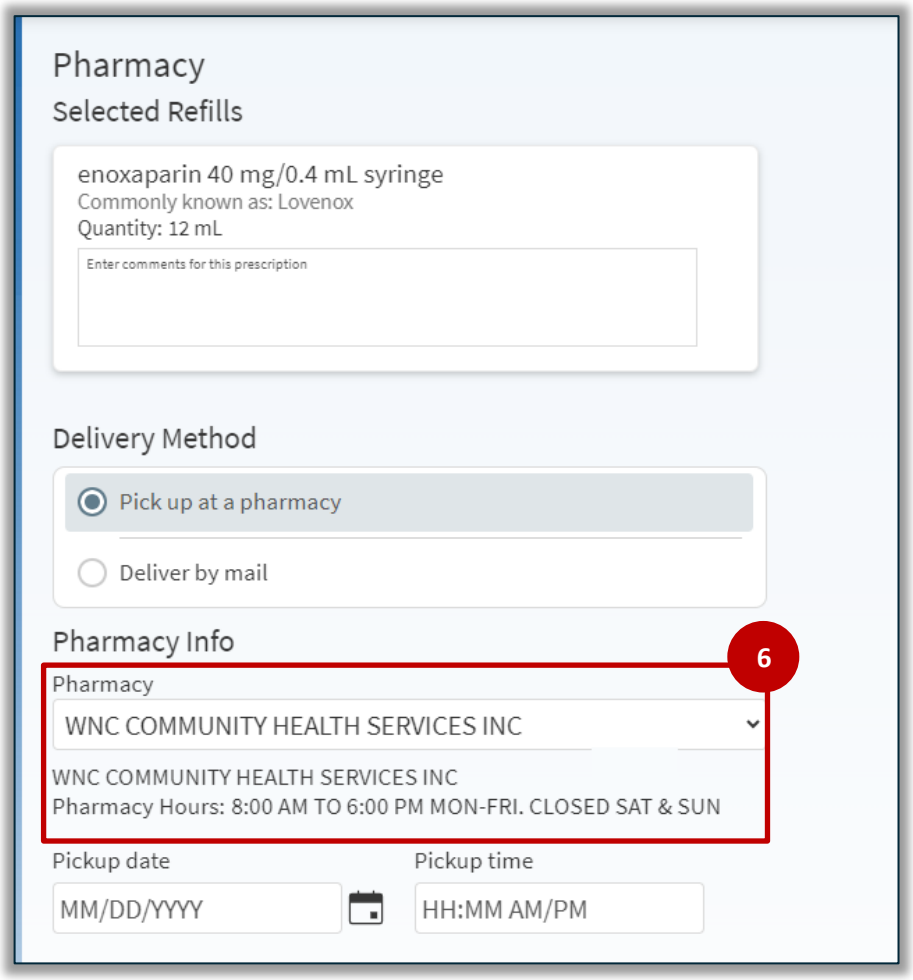
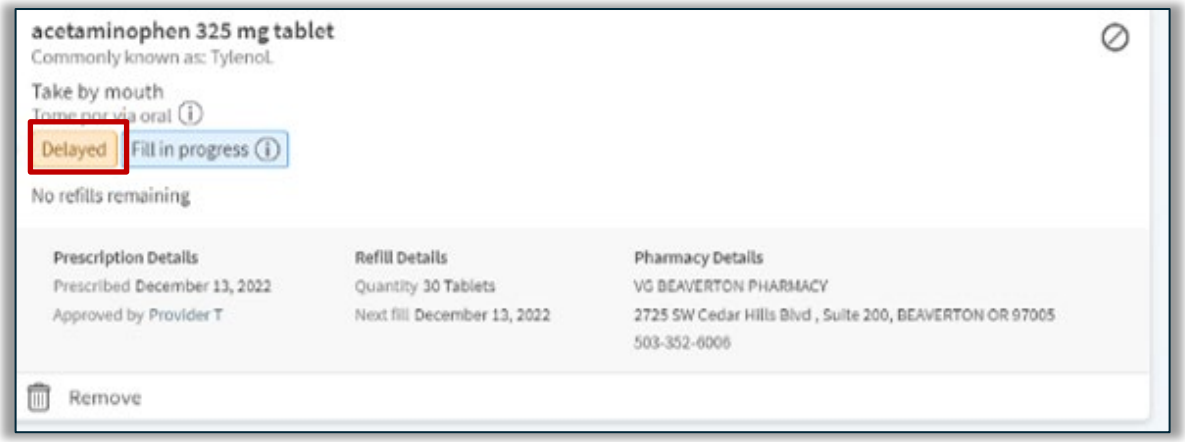
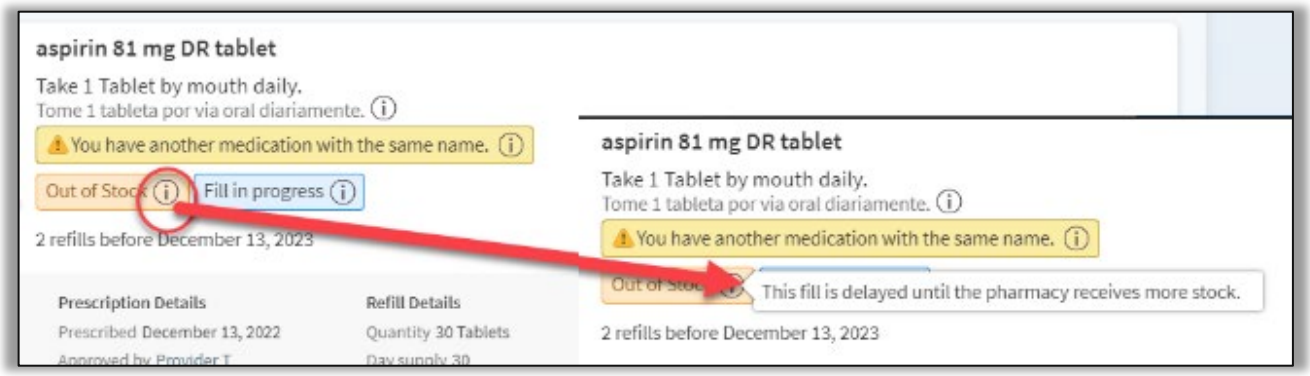


If requesting a refill and the pharmacy is not able to process the request, patients may see flags entered on the request.

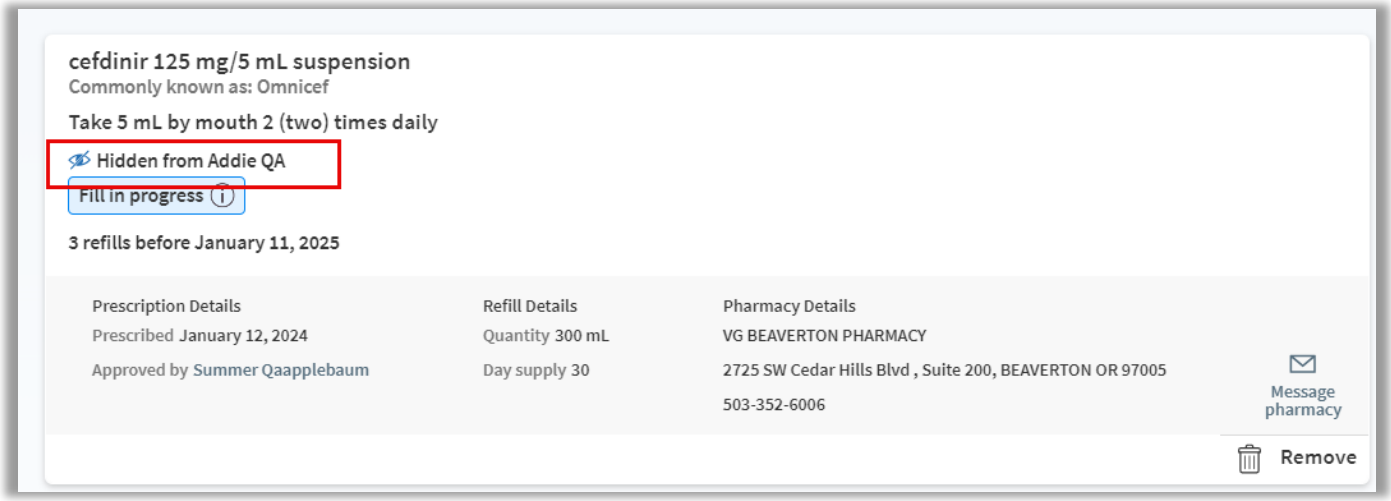
- **Delayed** – When Pharmacy staff uses the Prescription Delayed notification the system automatically adds a Prescription Delayed Flag and patients see it on the prescription in MyChart. This also Includes sending an email notification.



- **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.

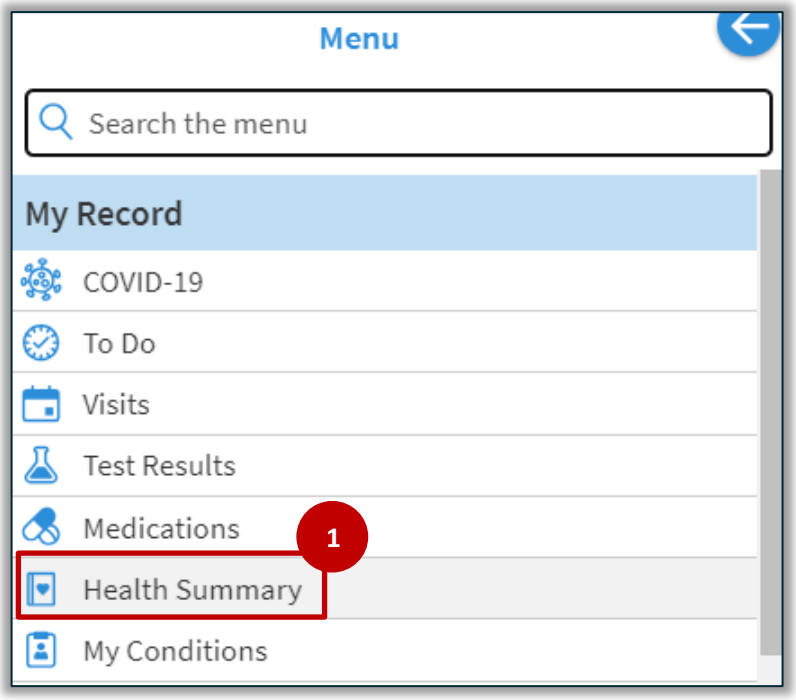


- All medications appear on the **MyChart Medications** page and **MyChart AVS Report** for the patient in their MyChart account (even if the medication is set to hidden for proxies). If the medication is set to be hidden for the proxy, then a "Hidden From..." indicator appears in the medication card.



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.

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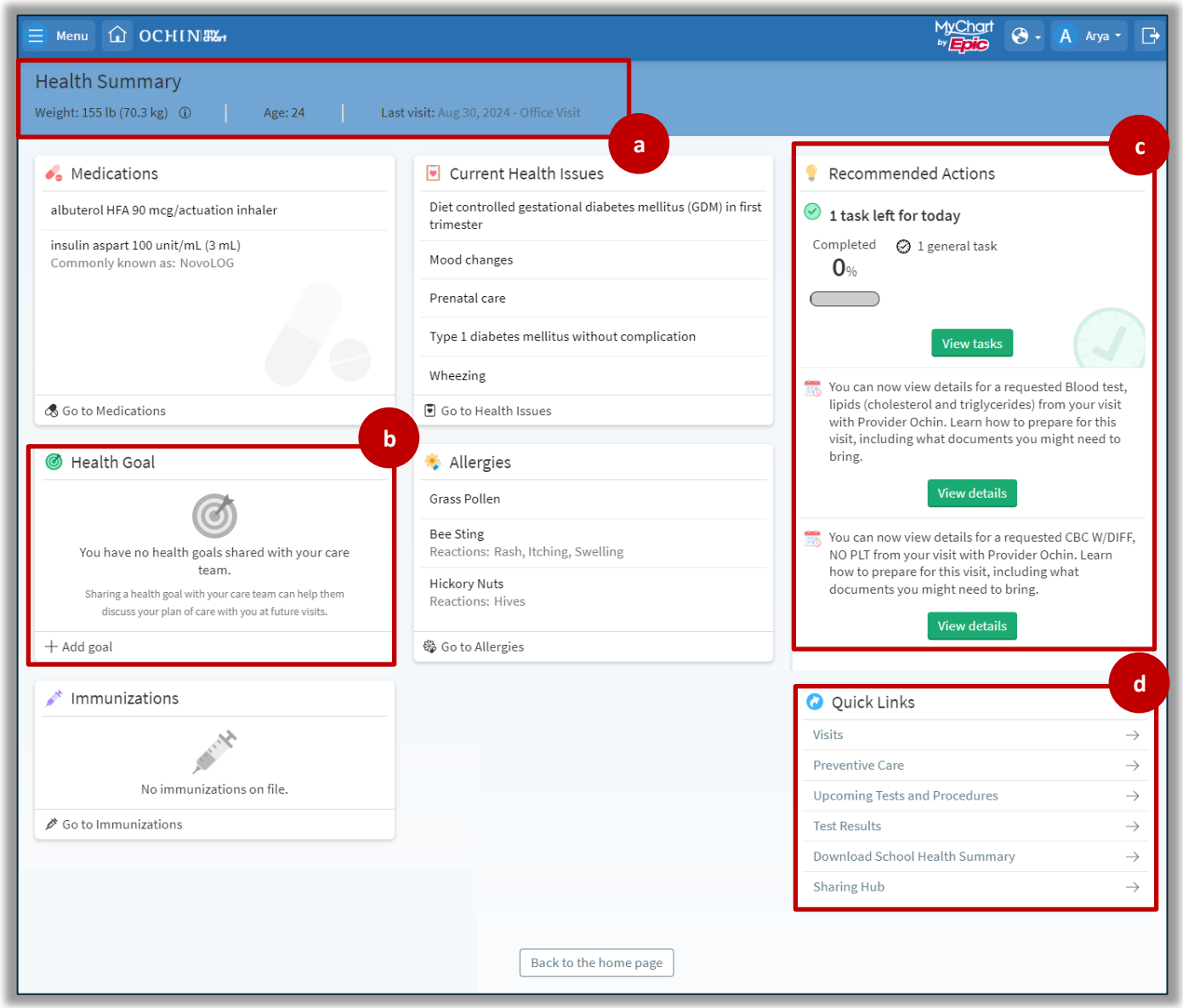

The same features found in the web application are available in the mobile app. ***Note:*** *To see updates in the mobile app, patients must update the app to version 10.9 or higher.*

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).

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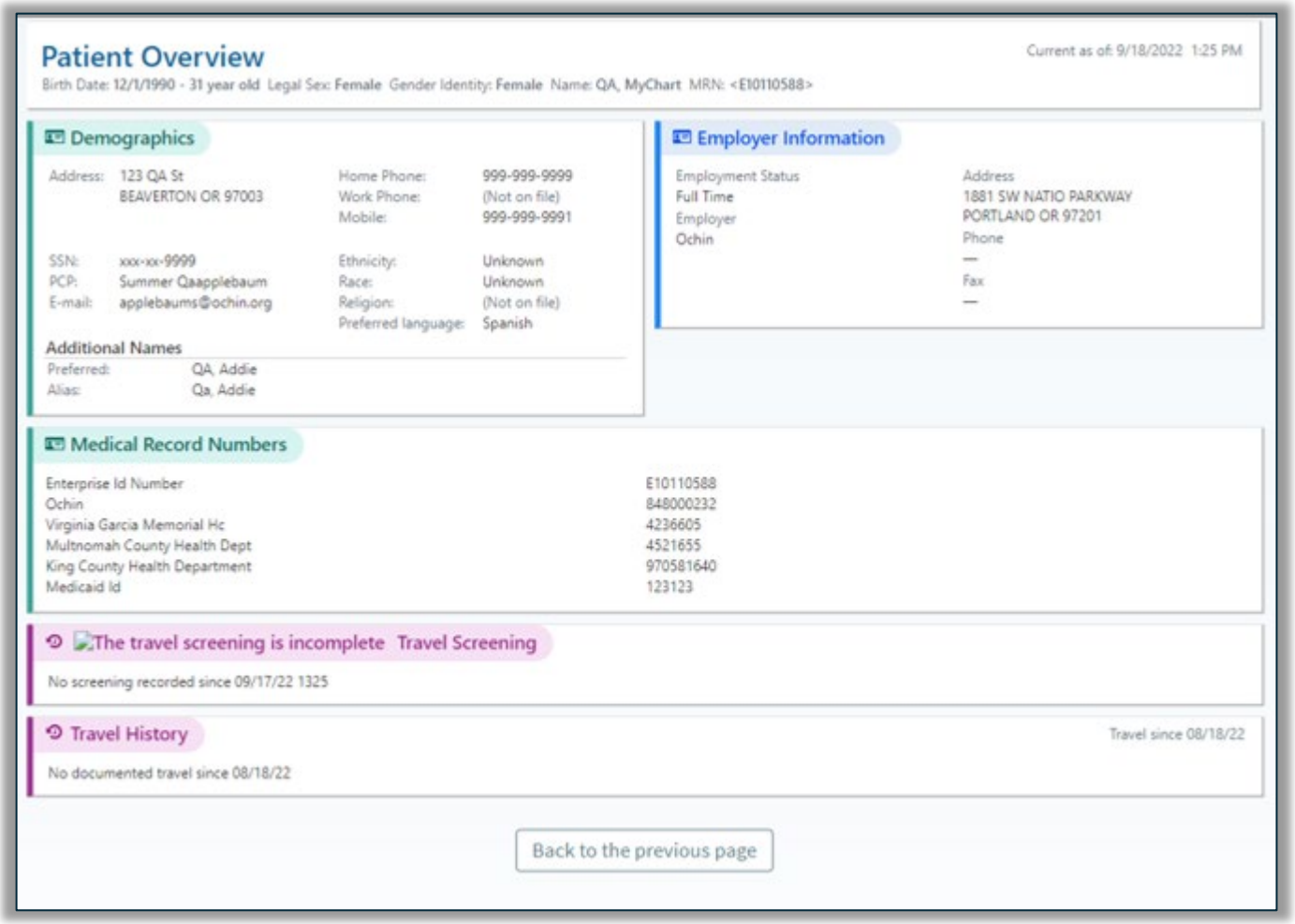
- **Travel History -** displays the patient's last documented travel history within the last 30 days.

MyChart Menu > My Record > Patient Overview



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

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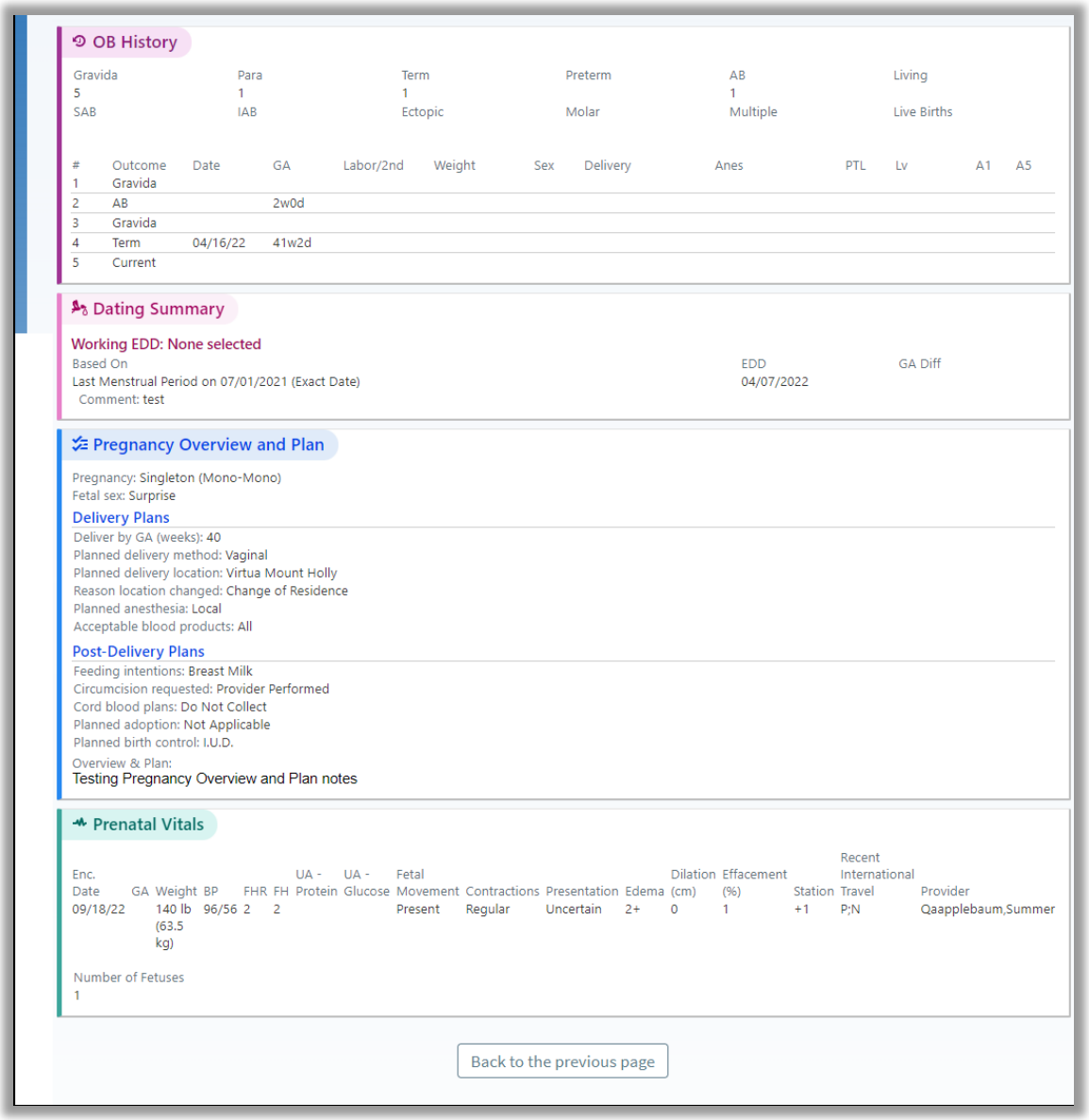

Note: The Dating Summary, Pregnancy Overview and Plan, and Prenatal Vitals only display information if the patient has an active pregnancy episode.

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."

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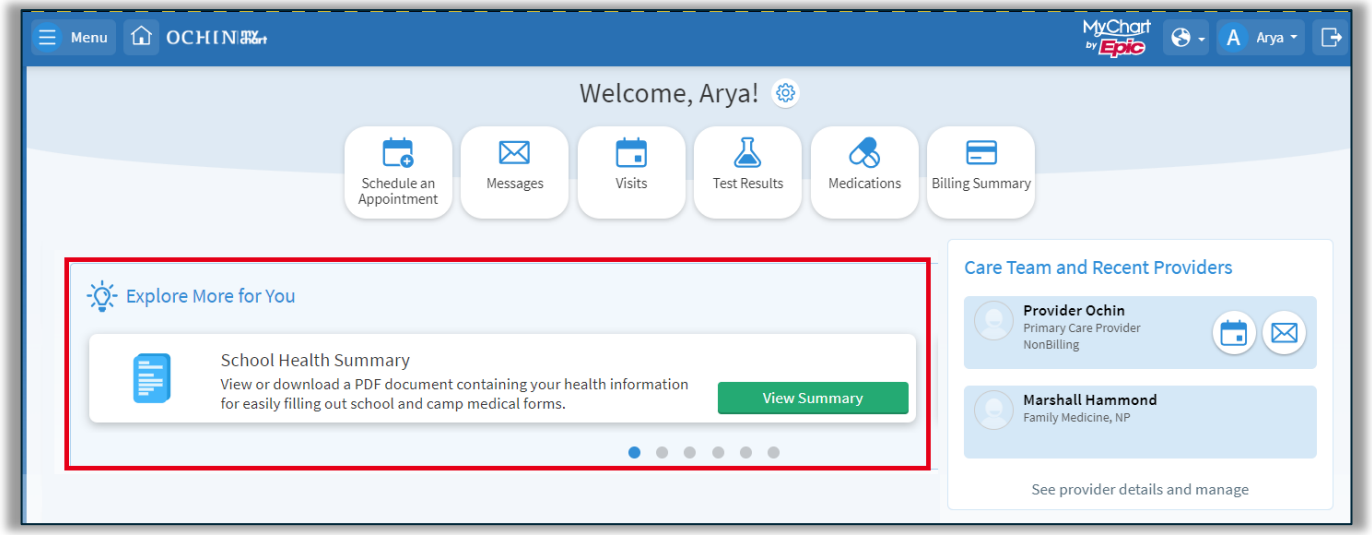

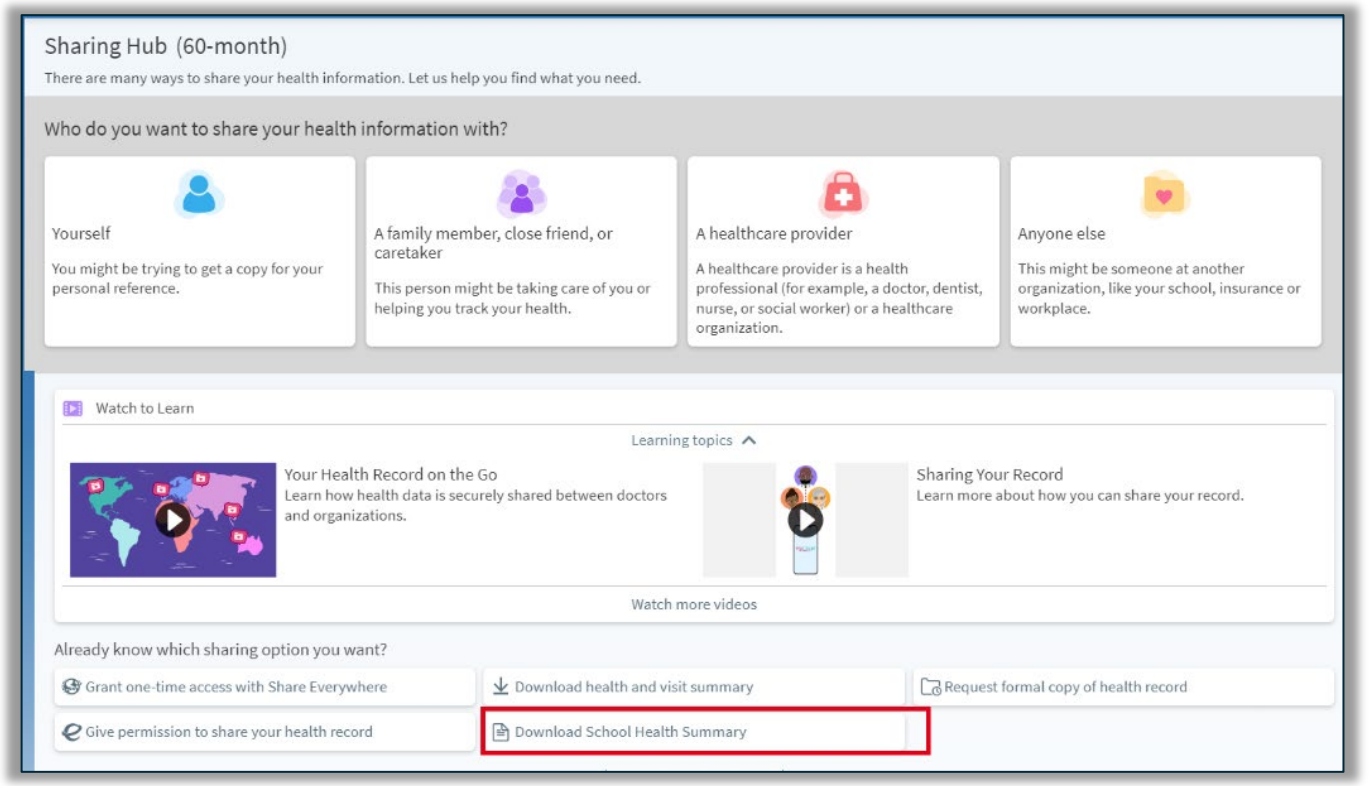

Visits

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.

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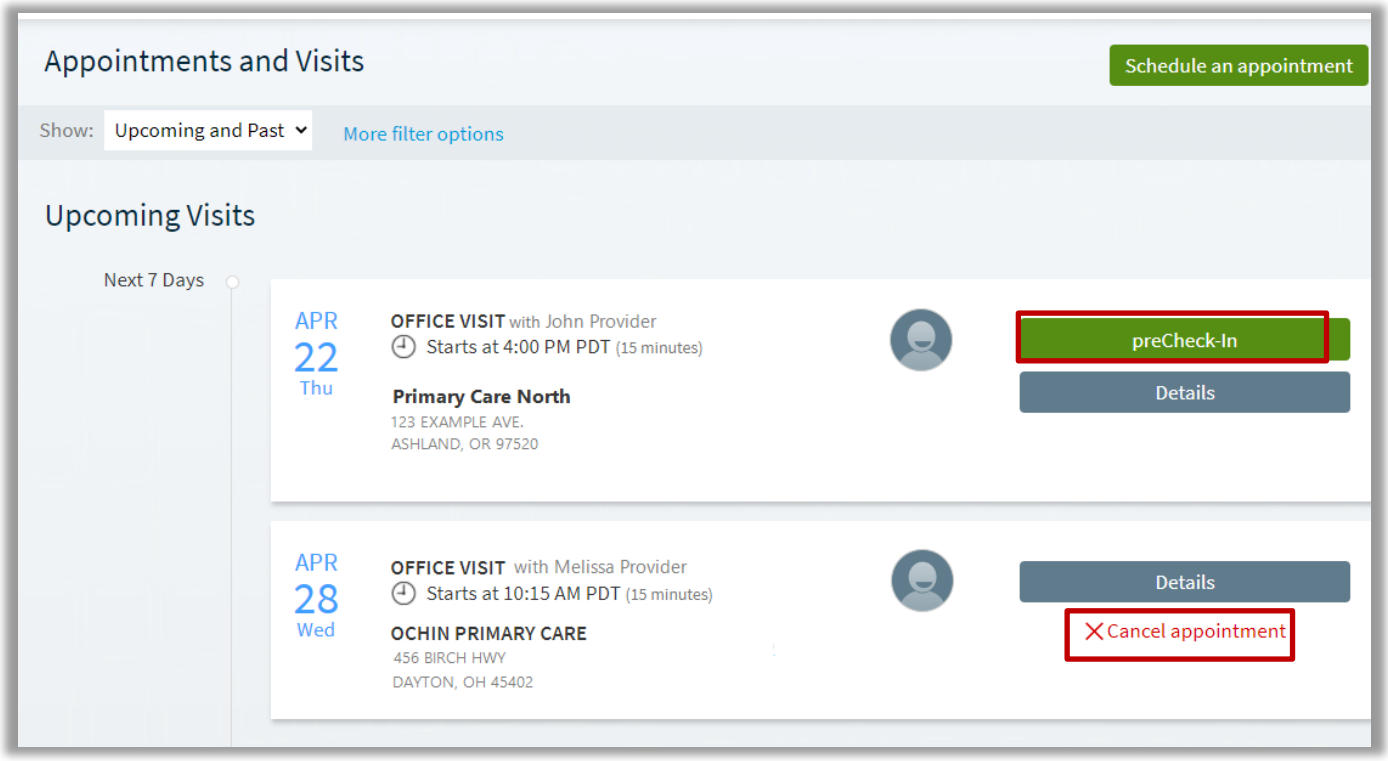
- Verify or update medications, allergies, and health issues.
- Answer appointment-related questionnaires.
- Verify guarantor information.

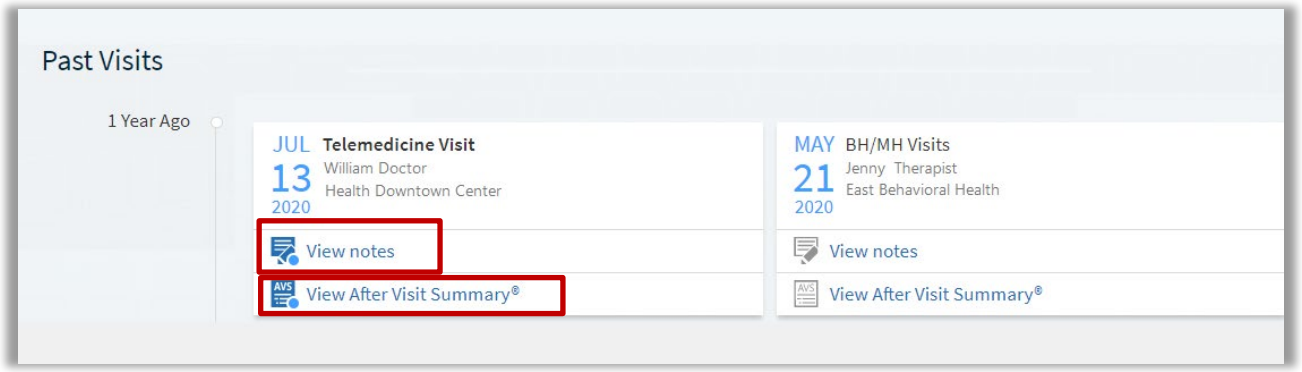
In MyChart, upcoming Off-site visits can be viewed in the Appointments and Visits page when the Service Area is configured for offsite encounter.

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

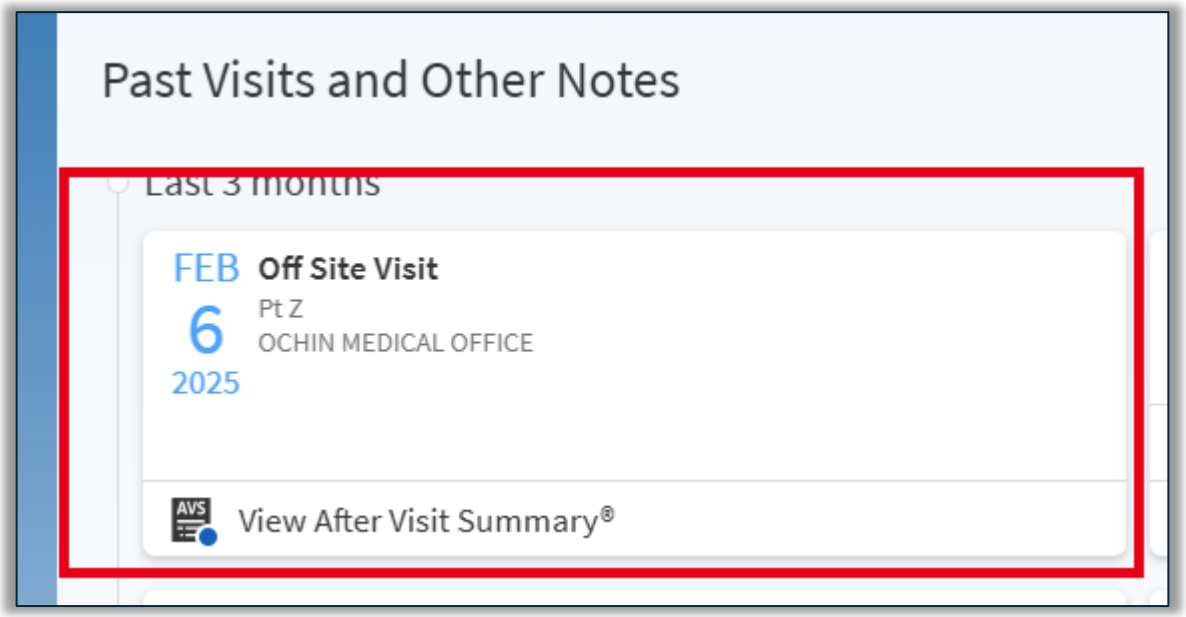


For past appointments:

- 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**.



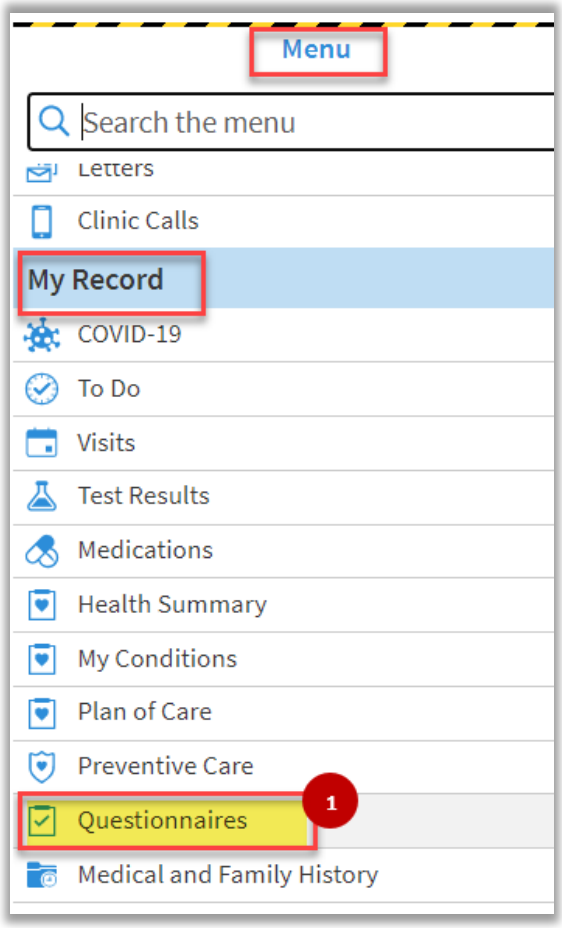
- This feature is available for Off Site Visits as well.



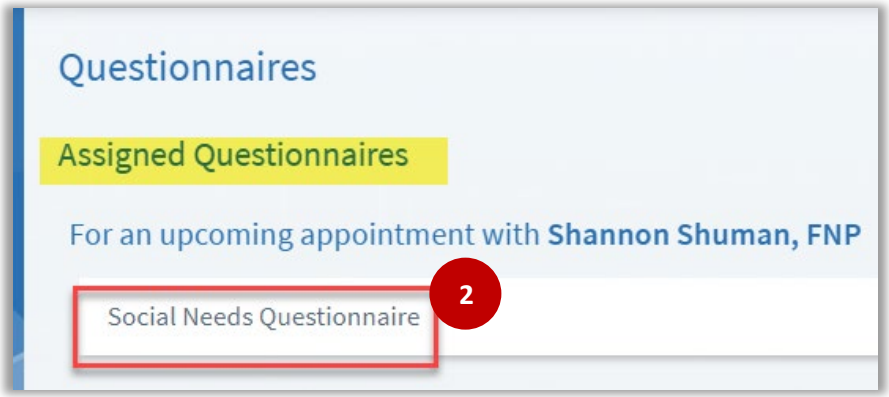
Questionnaires

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.

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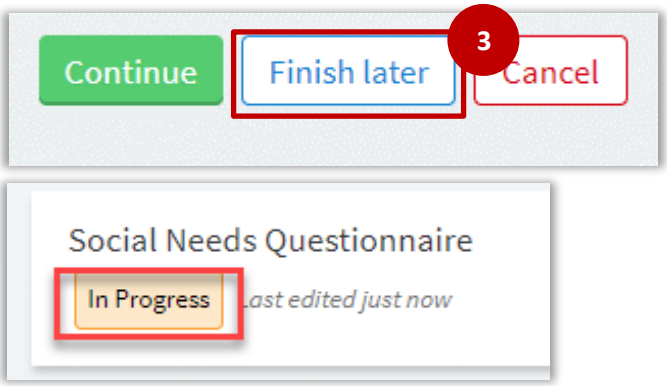
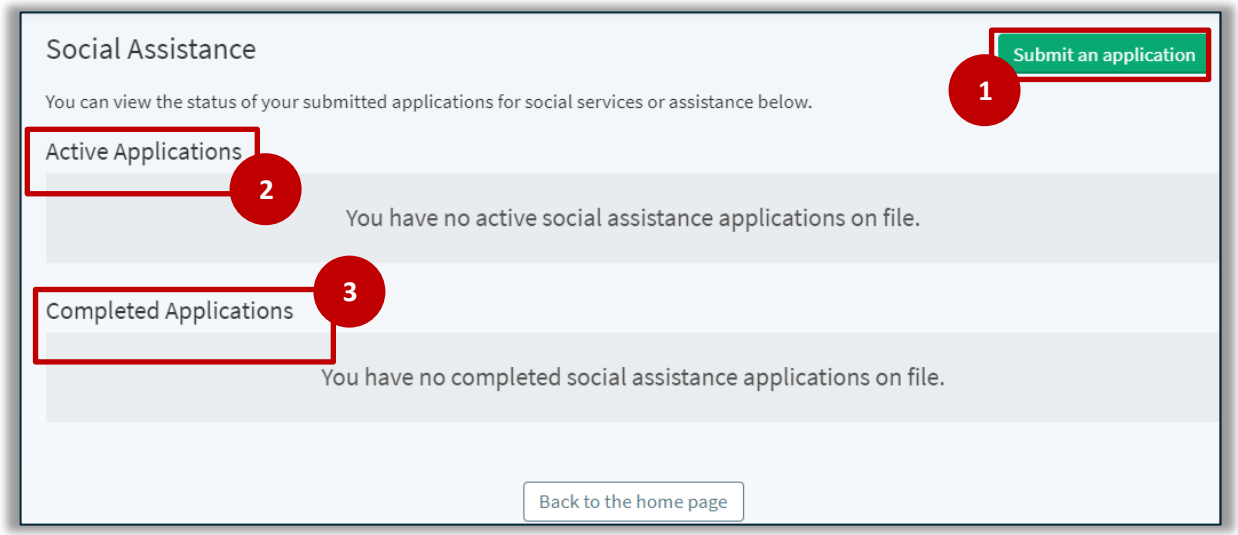


Social Assistance

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.”

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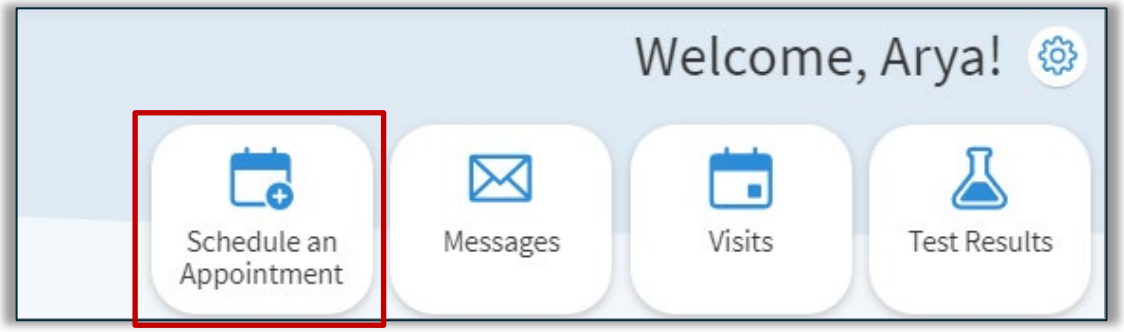
Schedule an Appointment

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

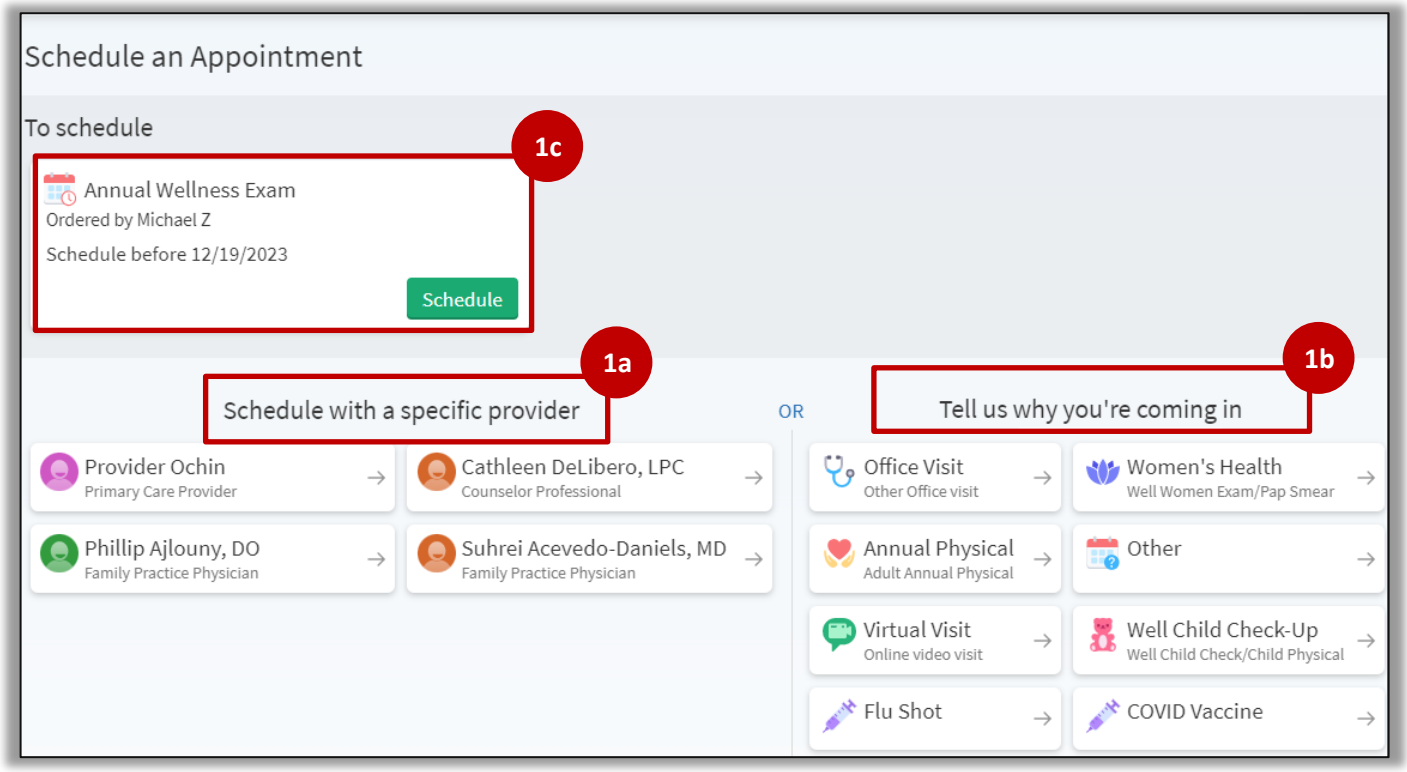


1. The **'Schedule an Appointment'** function in MyChart has filters that allow patients the options to schedule:

    a. With a specific provider.

    b. By visit reason.

    c. If a provider has ordered an appointment for the patient to schedule.



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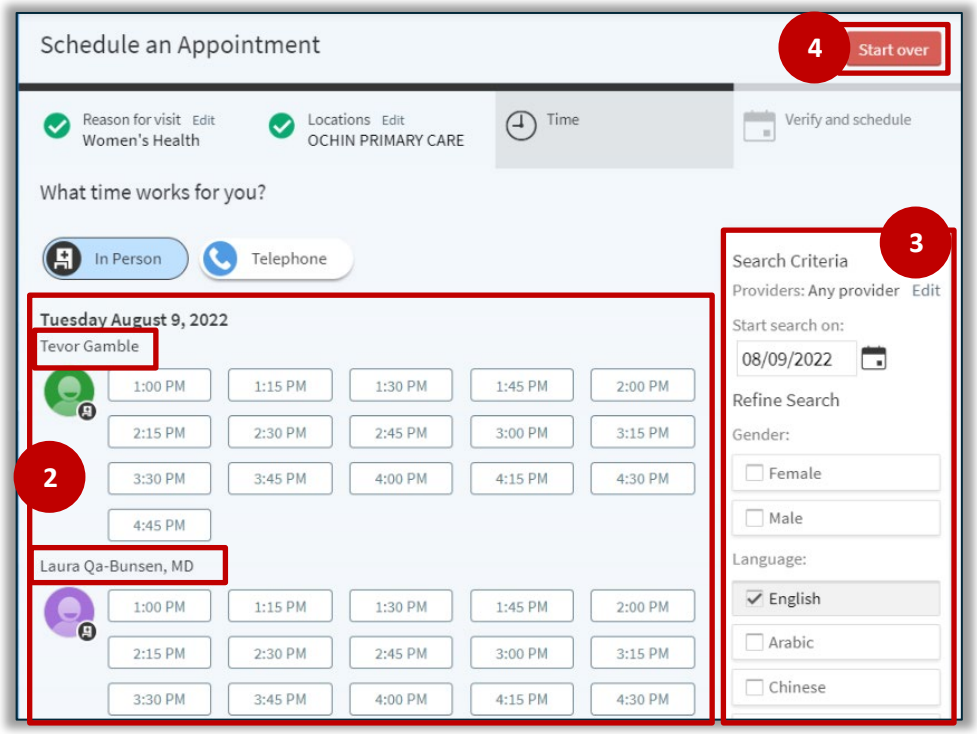
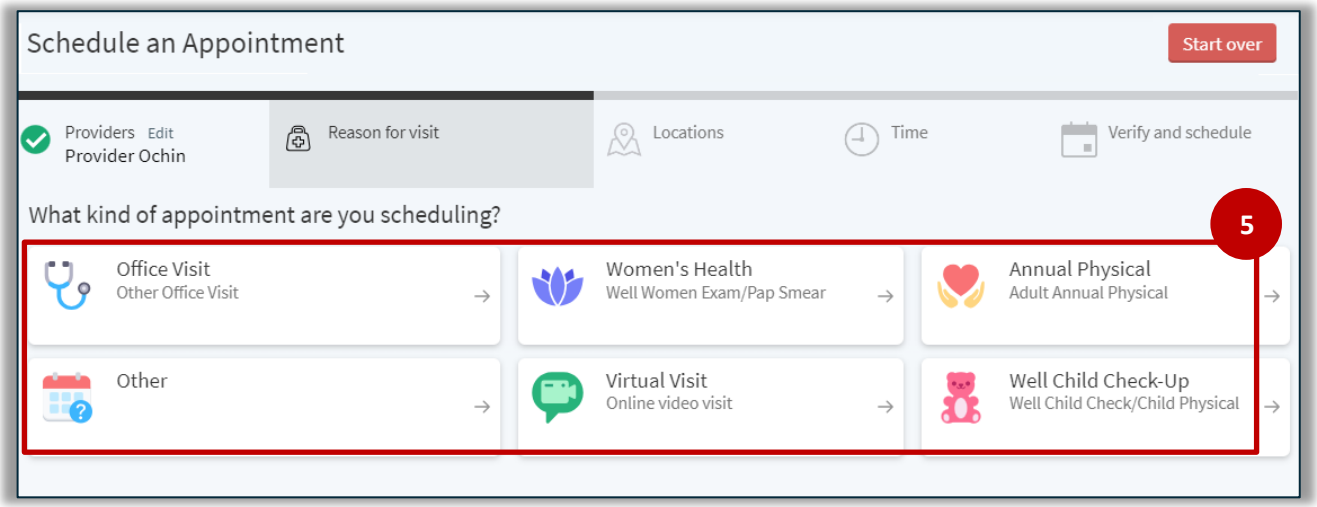
2. From this screen, the patient can either select a specific provider or can use the provider filters by selecting a visit type. Once they select a visit type they are presented with a list of providers (with whom they have a relationship) that have schedules available.

3. 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.

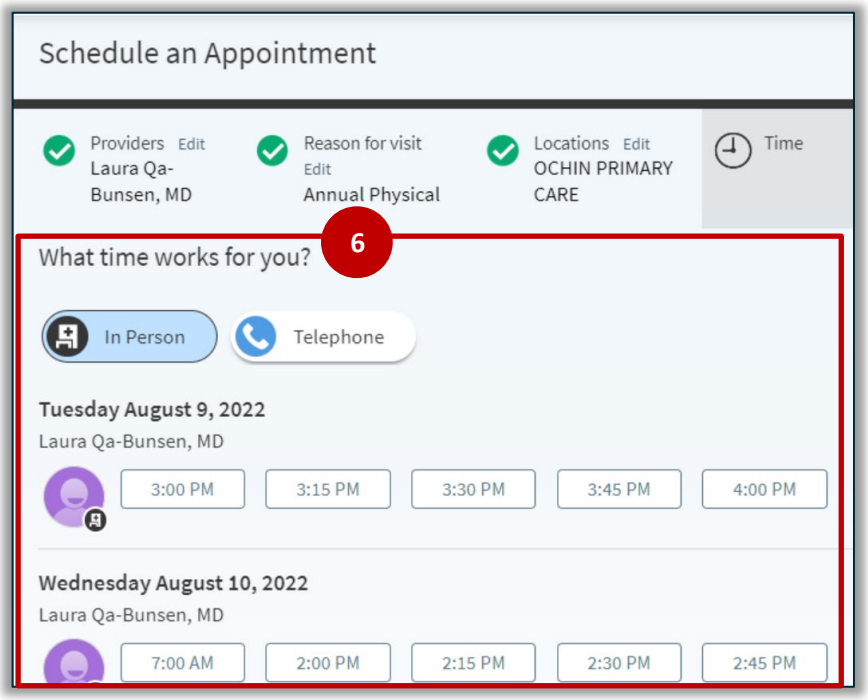
4. If the patient wants to start over there is a red '**Start over**' button available for them to select.



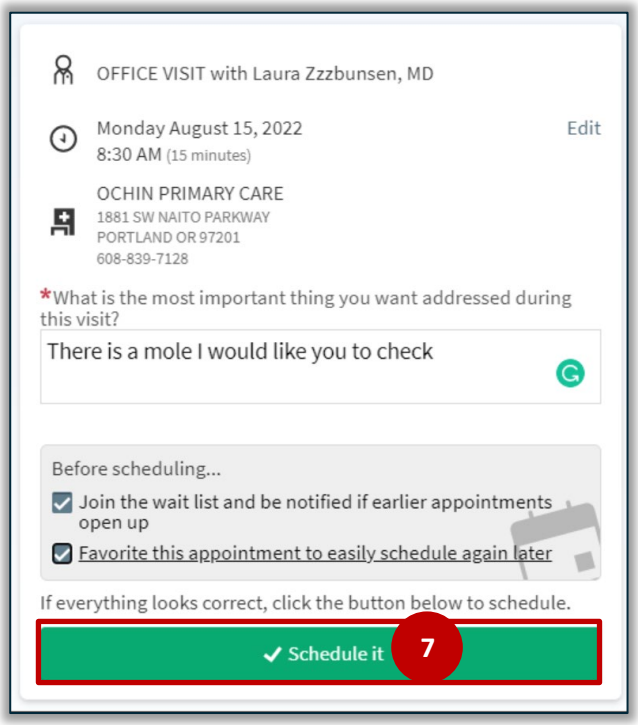
5. If the patient selects a provider first, they are presented with the '**What kind of appointment are you scheduling?**' (**Reason for visit**) screen. Once the kind of appointment is selected, the times that the provider has available are shown, and only date filtering is offered.



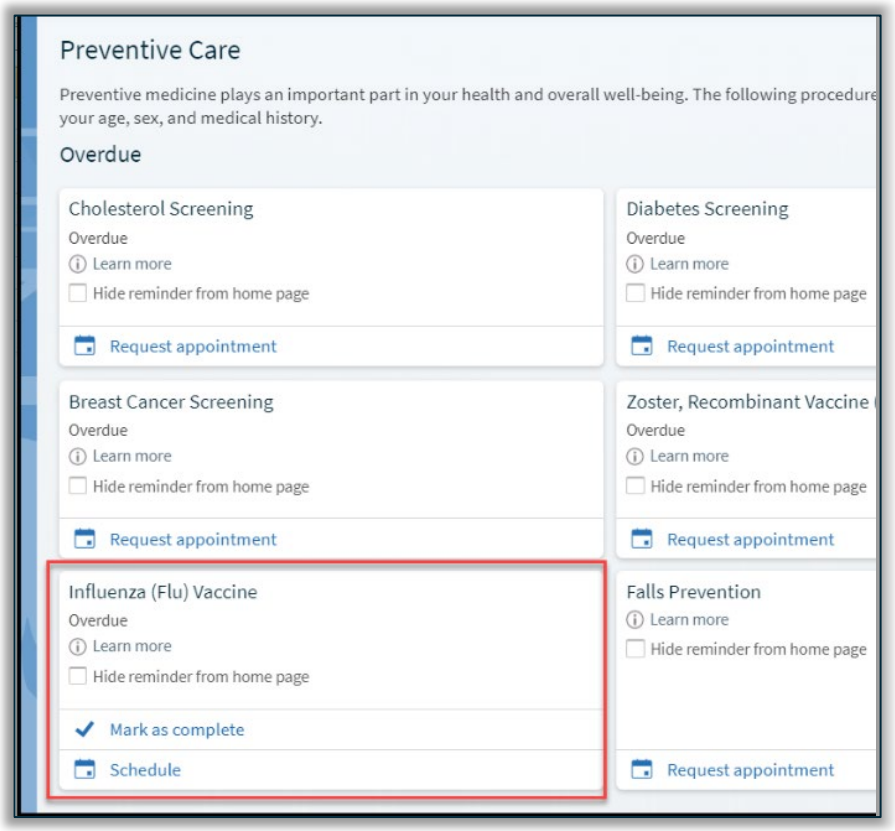
6. A **'What time works for you**?' prompt screen is shown to the patient where they can select the time they would like to be seen.



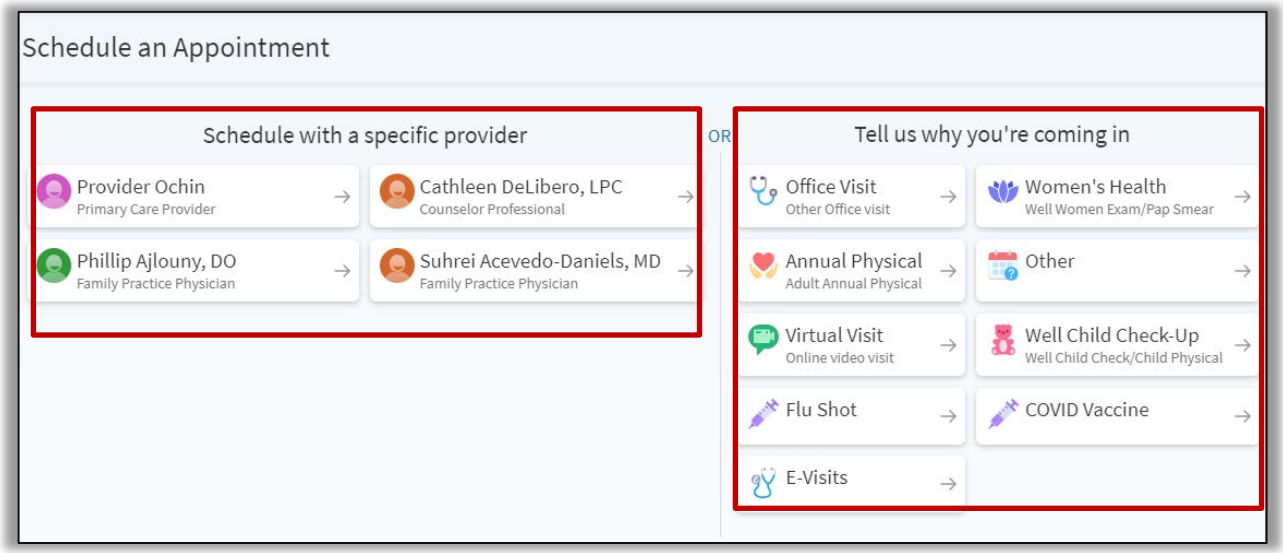
7. Once the desired appointment is selected, click the "**Schedule it**" button to complete the appointment request.



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



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



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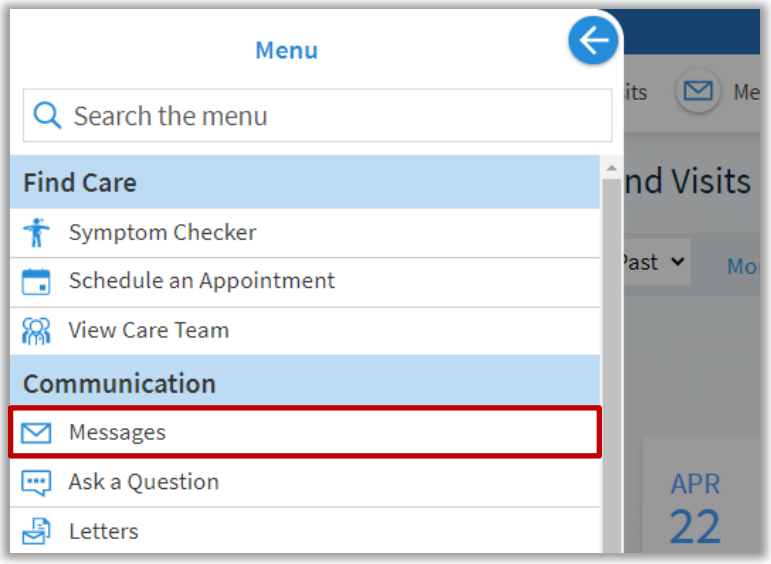
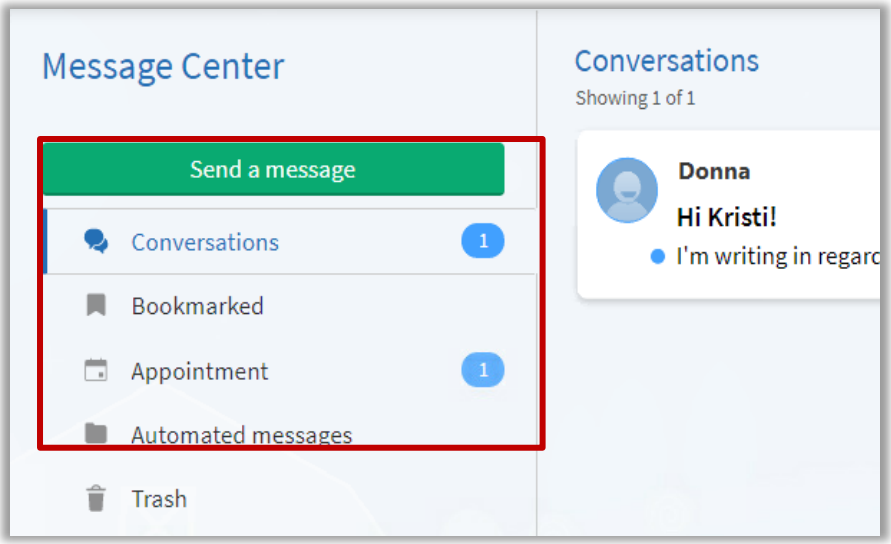
Messaging

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



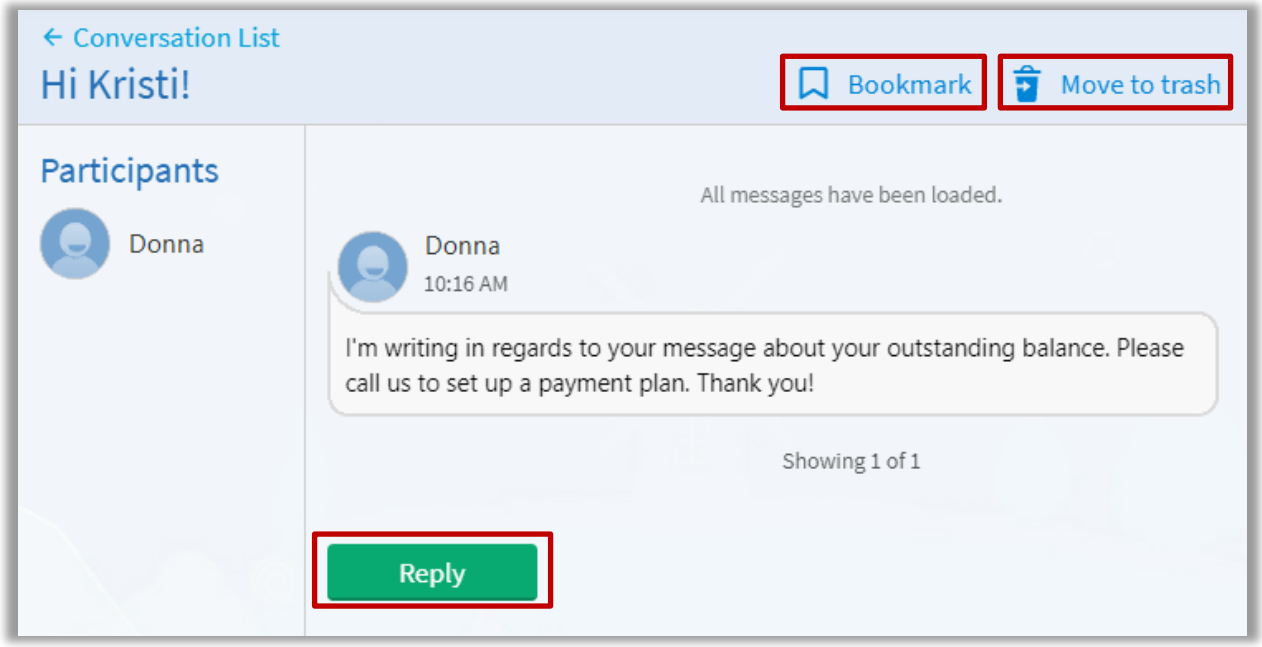
The Message Center includes five folders, displayed on the left sidebar:

- 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

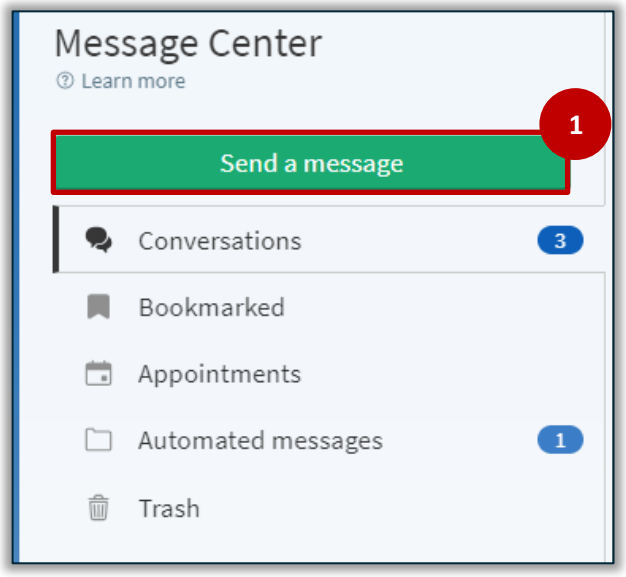
- Click a message from the Conversation List to view the details of the message.
- Click the **Reply** button to respond to the message.
- To flag a conversation for easy access in the future, click **Bookmark**. The conversation is flagged and appears in the Bookmarked folder.
- Click **Move to trash**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



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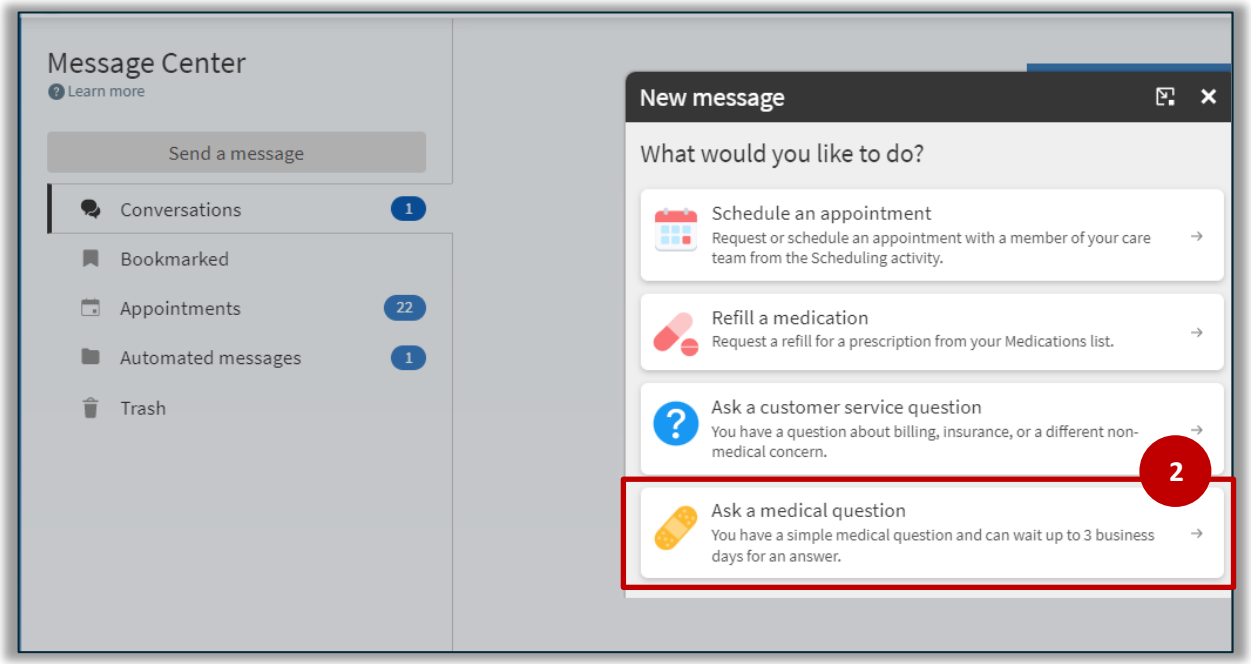
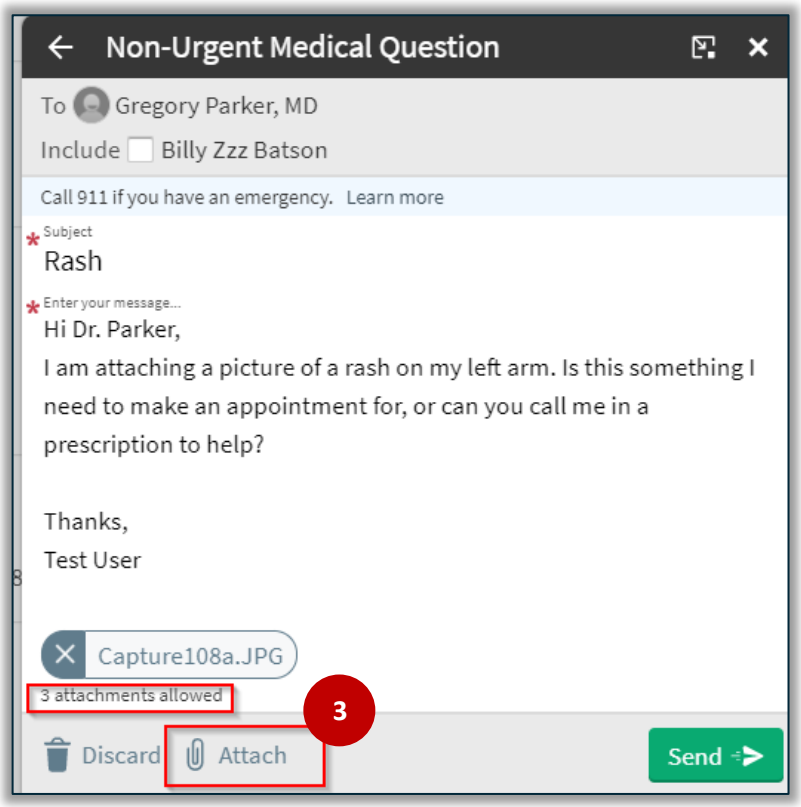
2. Click **Ask a medical question**.



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.



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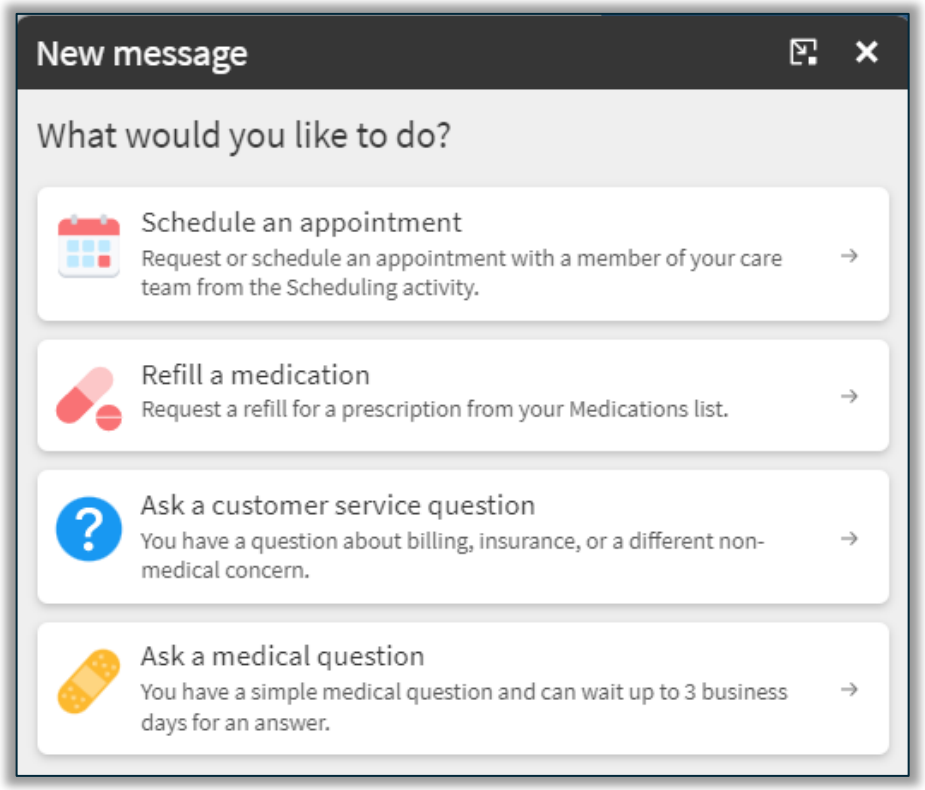
Send a Message

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**.**

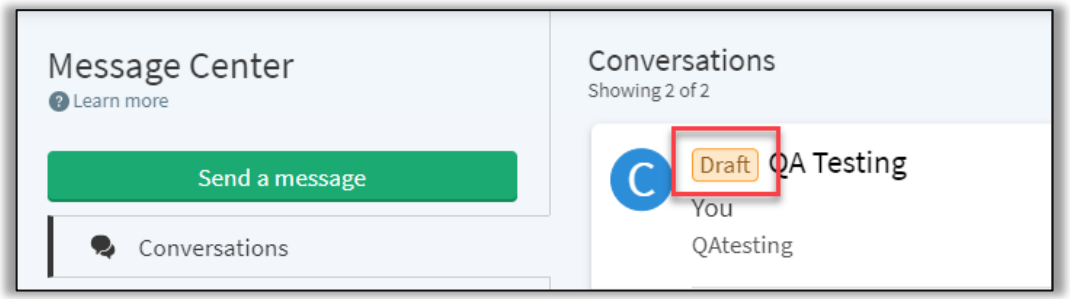
MyChart messages are secure, meaning your information stays private as it is sent over the Internet.

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

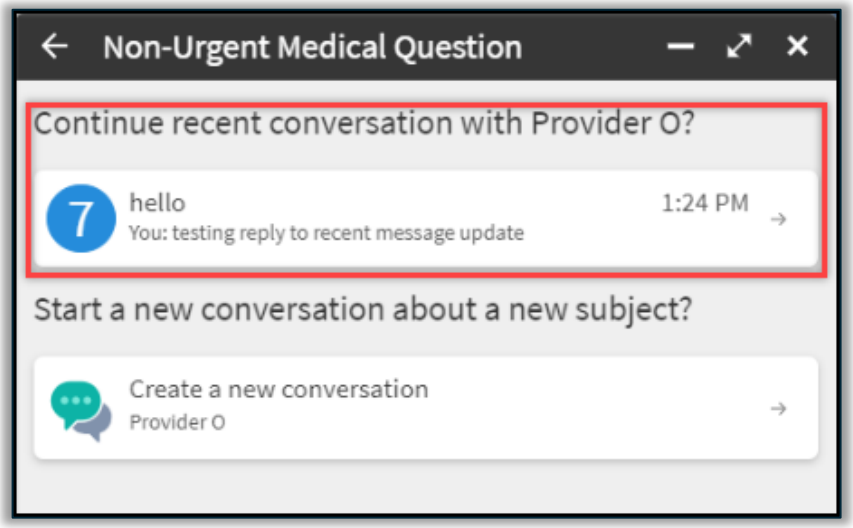
- **Medical Question**: allows you to send a message about non-urgent medical concerns, prescriptions, test results, and visit follow-up questions.
- **Customer service question** allows you to send a message about billing, insurance, referrals, website issues, or complaints.



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.



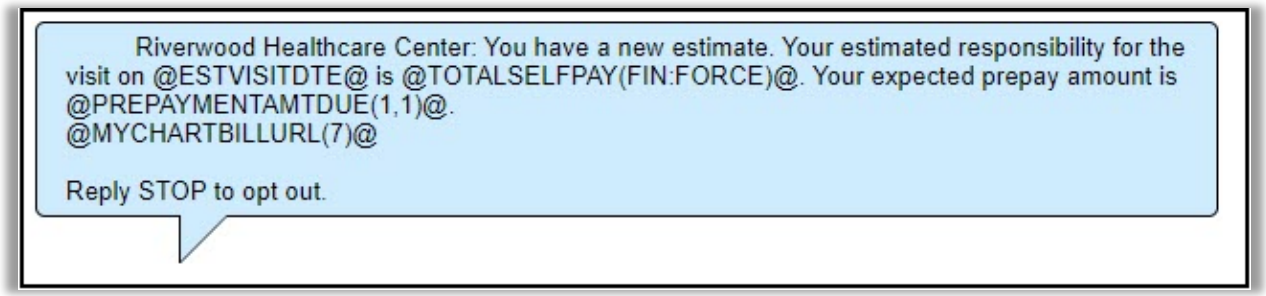
In addition, Medical Advice Requests from MyChart display a continue recent conversations option when a patient selects the same message type and provider within the past five days of a new conversation.



Billing and Insurance

Estimate Notifications

For dental and medical estimates have four New Estimate and seven Replaced Estimate notifications that are automatically sent to the guarantor when a new finalized estimate becomes available. These notifications apply to both medical and dental estimates.



Eligibility for SMS Notifications

Estimate SMS text message notification are automatically sent based on conditions:

- A mobile phone number is on file.
- Opt-In consent for receiving text messages is recorded.
- Communication Preference 'Text Message' is set as for is recorded as the communication method for Billing > Estimate Ready.
- A new finalized estimate is available.

Medical New Estimate Notifications

- **New Estimate - Visit with Prepay Due**: is sent to the guarantor when an estimate is finalized with a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.

- **New Estimate - Visit with Prepay Due and Prepay Discount**: is sent to the guarantor when an estimate is finalized with a prepay amount and prepay discount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **New Estimate - Visit Without Prepay Due**: is sent to the guarantor when an estimate is finalized without a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **New Estimate - Without Visit**: is sent to the guarantor when an estimate is finalized but not linked to a visit. The message contains a hyperlink to the MyChart Billing webpage.

Replaced Estimate Notifications

- **Replaced Estimate - Visit Without Prepay Due**: is sent when a patient's estimate is revised and finalized without a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Estimate - Visit with Prepay Due**: is sent to the guarantor when an estimate is revised and finalized with a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Estimate - Visit with Prepay Due and Prepay Discount:** is sent to the guarantor when an estimate is revised and finalized with linked to a visit. The revised estimate has a prepay amount and a prepay discount for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Estimate - Plan Updated - Visit with Prepay Due:** is sent to the guarantor when an estimate on a payment plan and linked to a visit is revised and finalized. The revised estimate has a prepay amount due for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Estimate - Plan Updated - Visit with Prepay Due and Prepay Discount:** is sent to the guarantor when an estimate on a payment plan and linked to a visit is revised and finalized. The revised estimate has a prepay amount and a prepay discount for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Estimate - Plan Updated - Visit Without Prepay Due:** is sent to the guarantor when an estimate on a payment plan and attached to a visit is revised and finalized without a prepay amount for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Estimate - Without Visit:** is sent to the guarantor when an estimate is revised and finalized without linked to a visit. The message contains a hyperlink to the MyChart Billing webpage.

Dental New Estimate Notifications

- **New Dental Estimate - Visit Without Prepay Due**: is sent to the guarantor when an estimate is finalized without a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **New Dental Estimate - Visit with Prepay Due**: is sent to the guarantor when an estimate is finalized with a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **New Dental Estimate - Without Visit:** is sent to the guarantor when an estimate is finalized but not linked to a visit. The message contains a hyperlink to the MyChart Billing webpage.

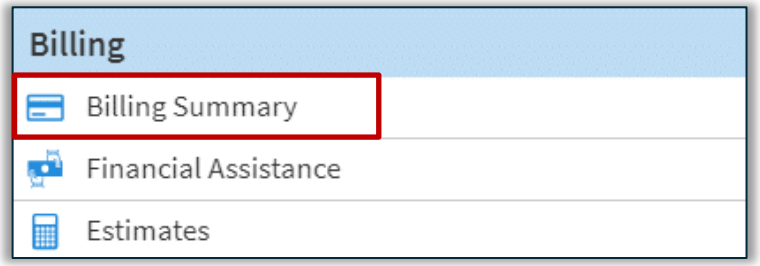
- **New Dental Estimate - Visit with Prepay Due and Prepay Discount**: is sent to the guarantor when an estimate is finalized with a prepay amount and prepay discount for a visit. The message contains a hyperlink to the MyChart Billing webpage.

Dental Updated Estimate Notifications

- **Replaced Dental Estimate - Visit Without Prepay Due**: is sent when a patient's estimate is revised and finalized without a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Dental Estimate - Visit with Prepay Due**: is sent to the guarantor when an estimate is revised and finalized with a prepay amount for a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Dental Estimate - Without Visit**: is sent to the guarantor when an estimate is revised and finalized without linked to a visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Dental Estimate - Visit with Prepay Due and Prepay Discount**: is sent to the guarantor when an estimate is revised and finalized with linked to a visit. The revised estimate has a prepay amount and a prepay discount for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Dental Estimate - Plan Updated - Visit with Prepay Due**: is sent to the guarantor when an estimate on a payment plan and linked to a visit is revised and finalized. The revised estimate has a prepay amount due for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Dental Estimate - Plan Updated - Visit with Prepay Due and Prepay Discount**: is sent to the guarantor when an estimate on a payment plan and linked to a visit is revised and finalized. The revised estimate has a prepay amount and a prepay discount for the visit. The message contains a hyperlink to the MyChart Billing webpage.
- **Replaced Plan Dental Estimate - Plan Updated - Visit Without Prepay Due**: is sent to the guarantor when an estimate on a payment plan and attached to a visit is revised and finalized without a prepay amount for the visit. The message contains a hyperlink to the MyChart Billing webpage.

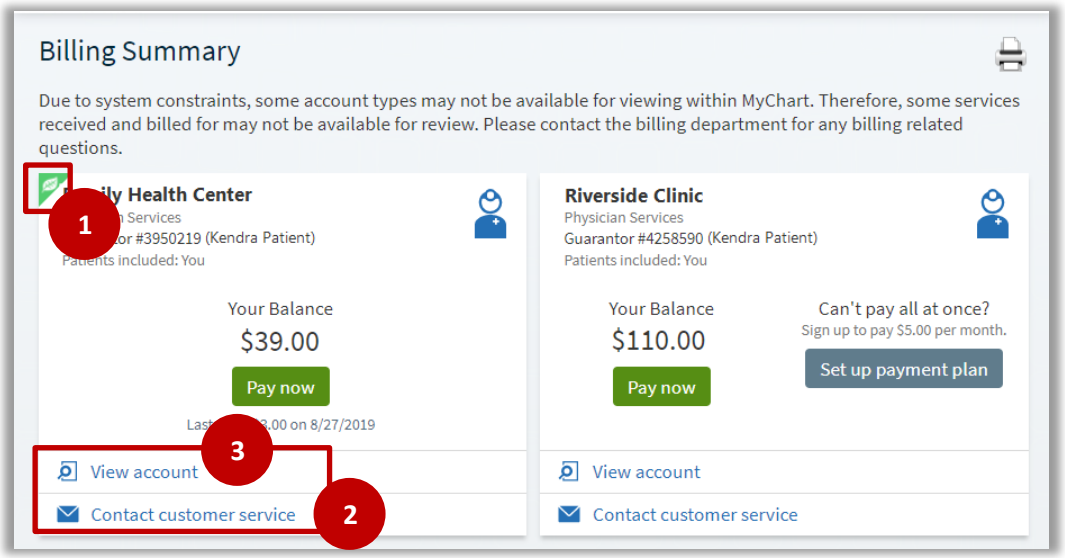
Billing Summary

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

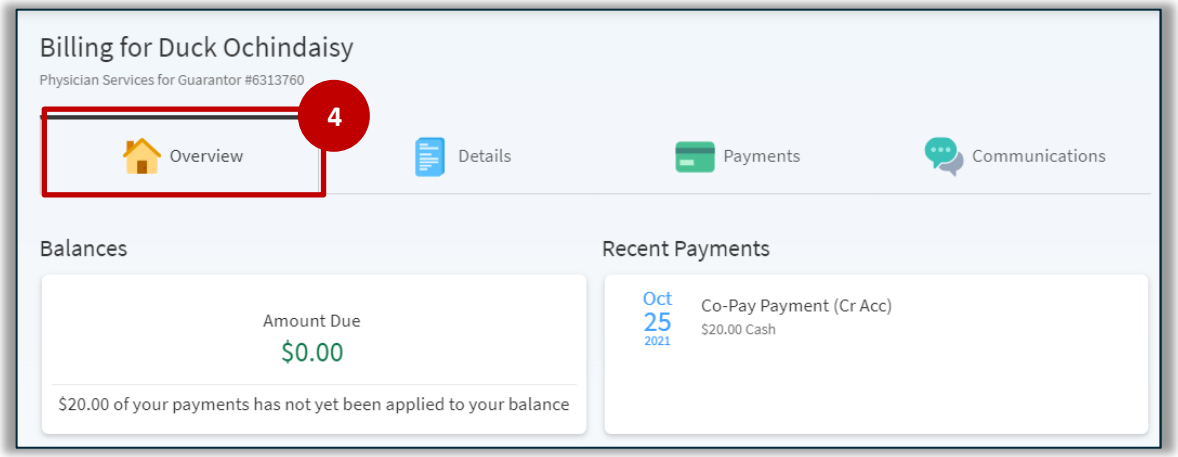


1. Accounts signed up for paperless billing are shown with the leaf icon.
2. If you have a question about the balance or other information for a billing account, you can use the **Contact customer service link** to send a message.

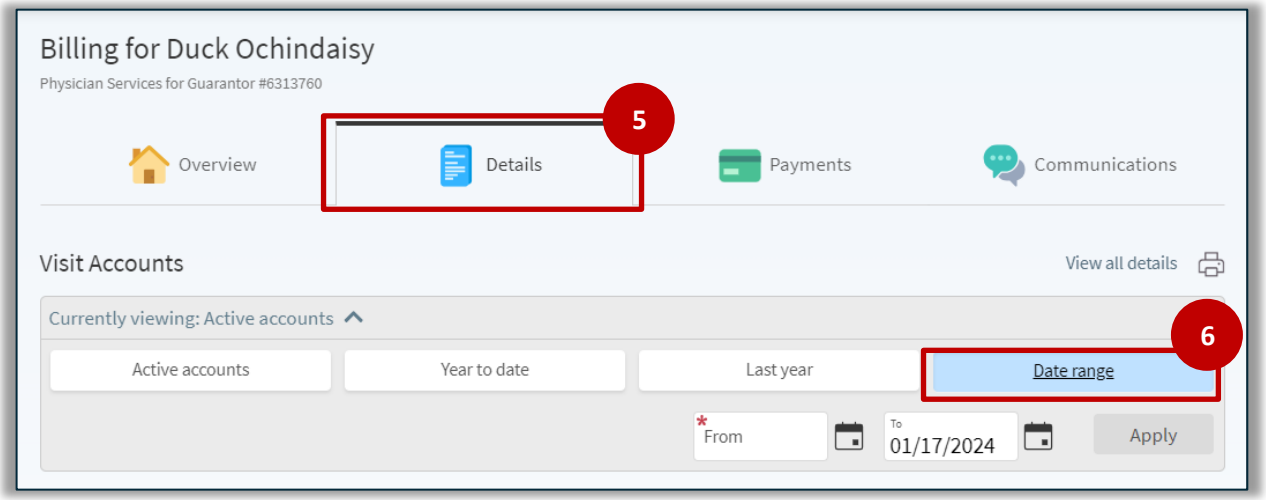
3. To view additional information about an account, including past statements, click the **View account** hyperlink.



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



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**.



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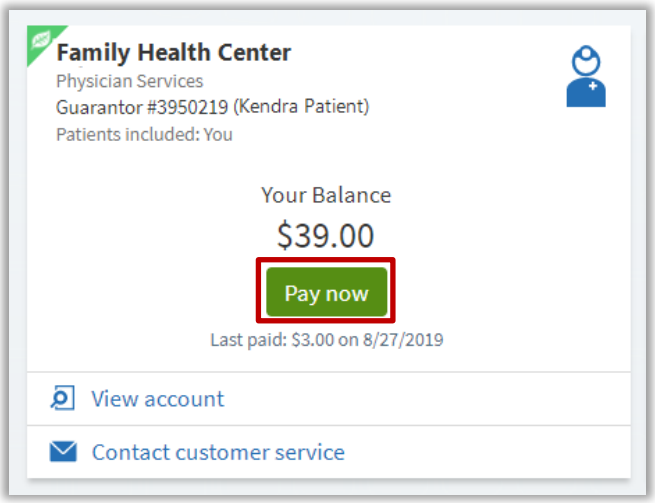
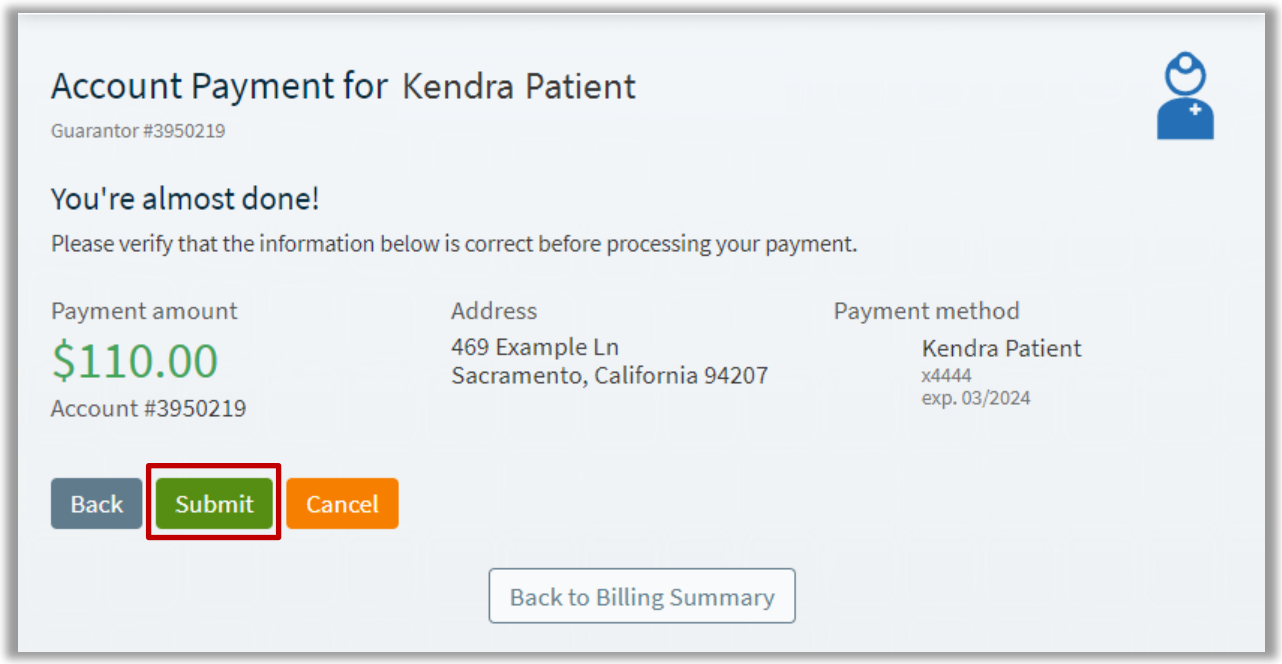
Make a Payment

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



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



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.

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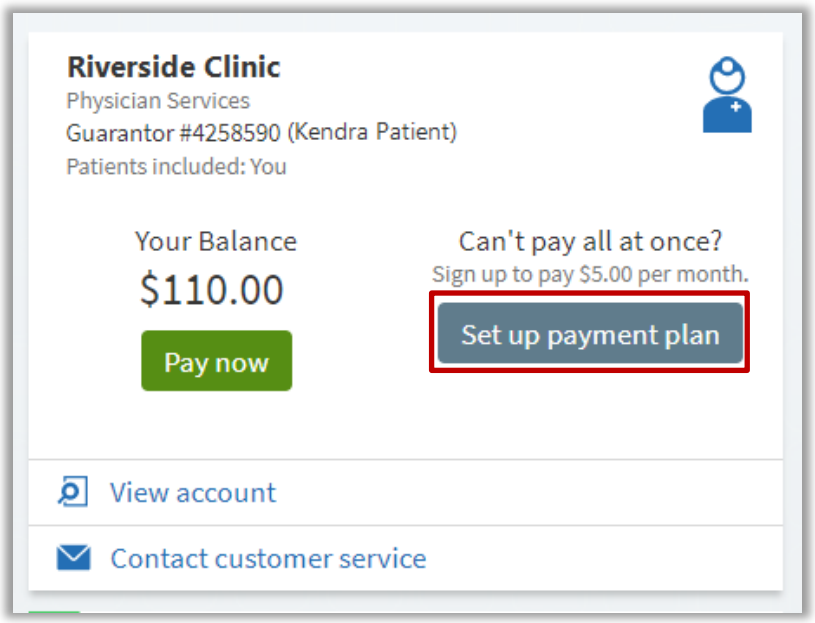
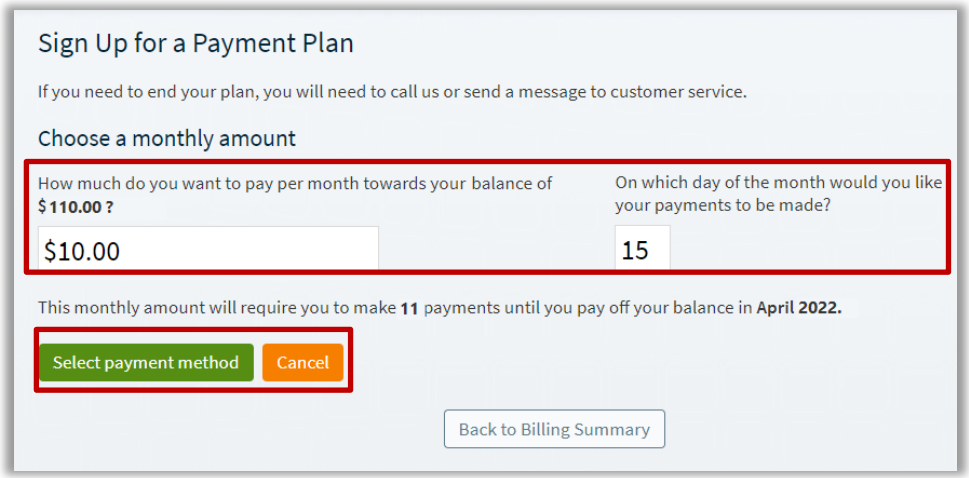


- Select the **monthly amount** and **payment day.**
- Click select payment method to enter your credit card information.



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.

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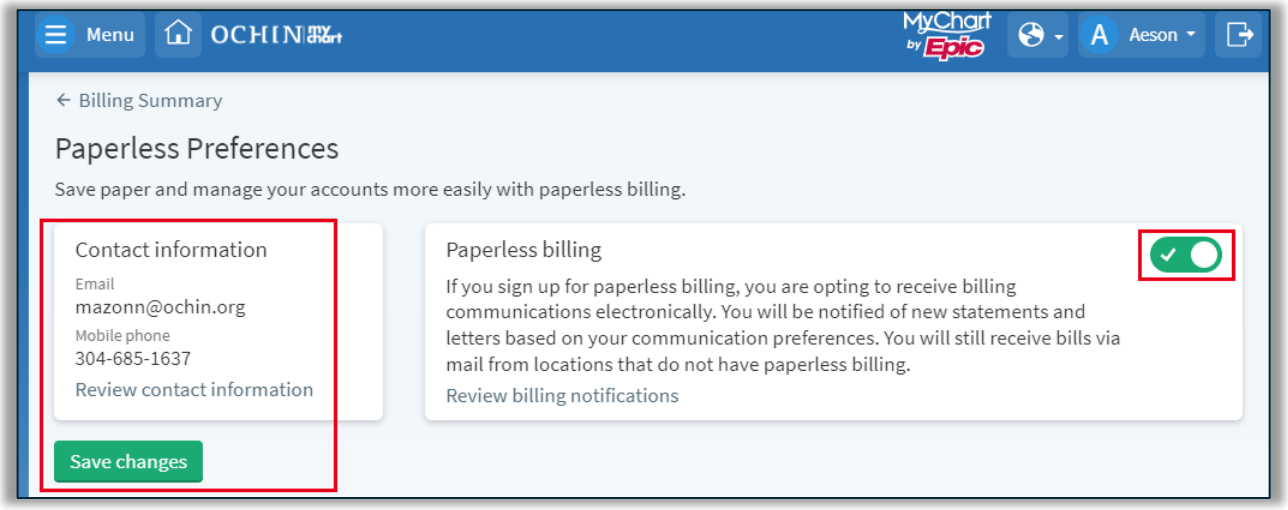
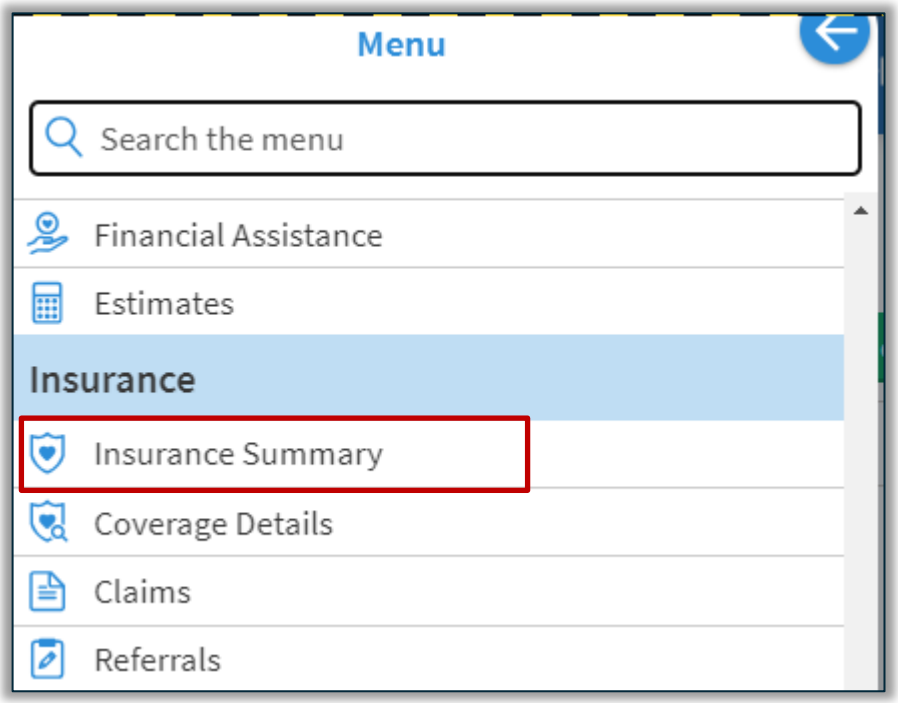
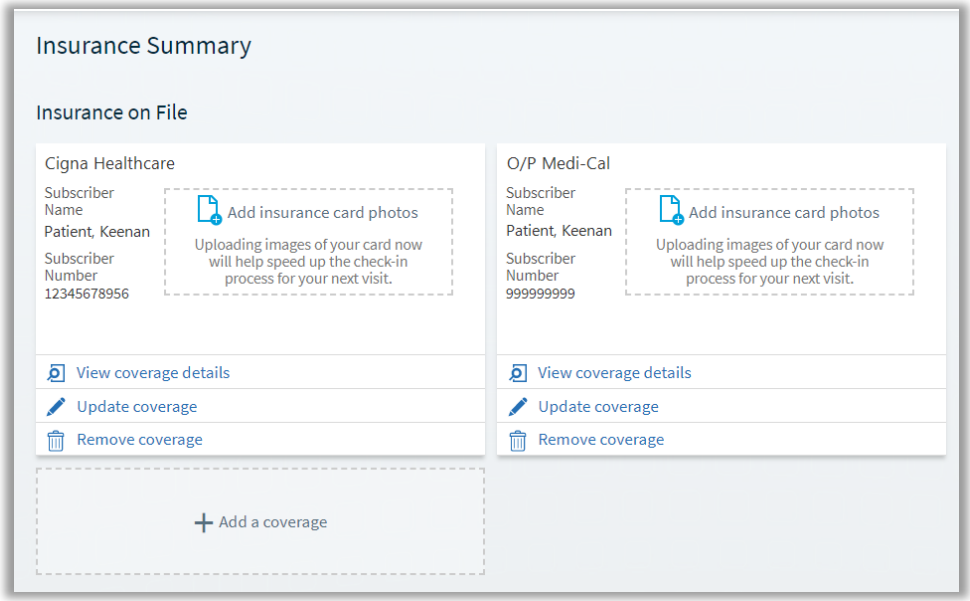

Menu
OCHIN
MyChart by Epic
Aeson
Billing Summary
Paperless Preferences
Save paper and manage your accounts more easily with paperless billing.
Contact information
Email
mazonn@ochin.org
Mobile phone
304-685-1637
Review contact information
Paperless billing
If you sign up for paperless billing, you are 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
Save changes

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.



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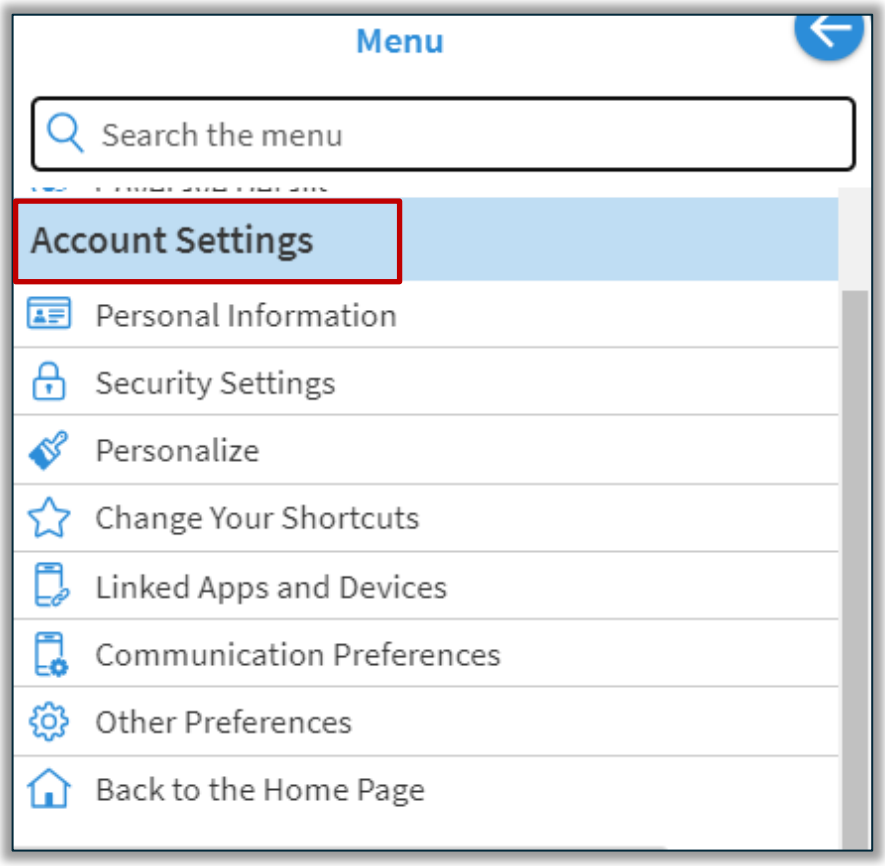
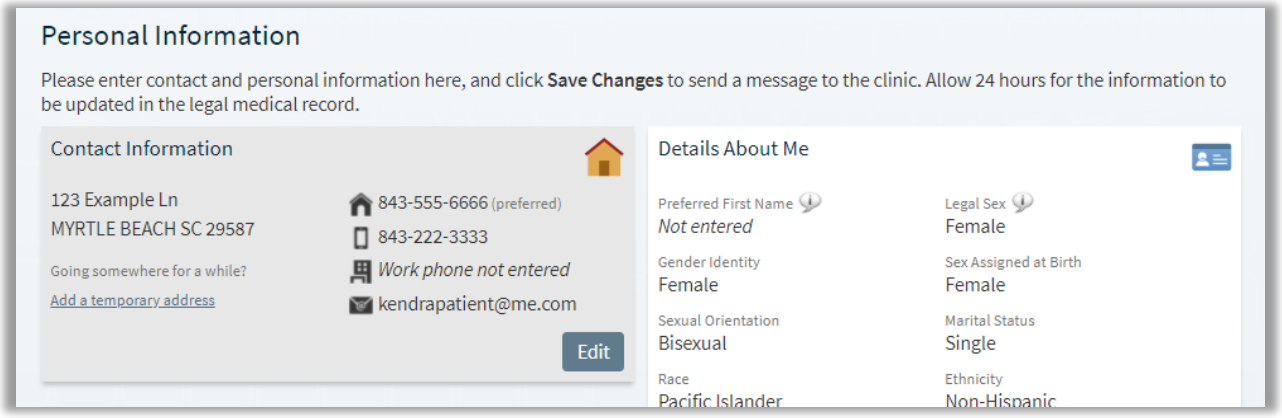
Manage Your Account

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.



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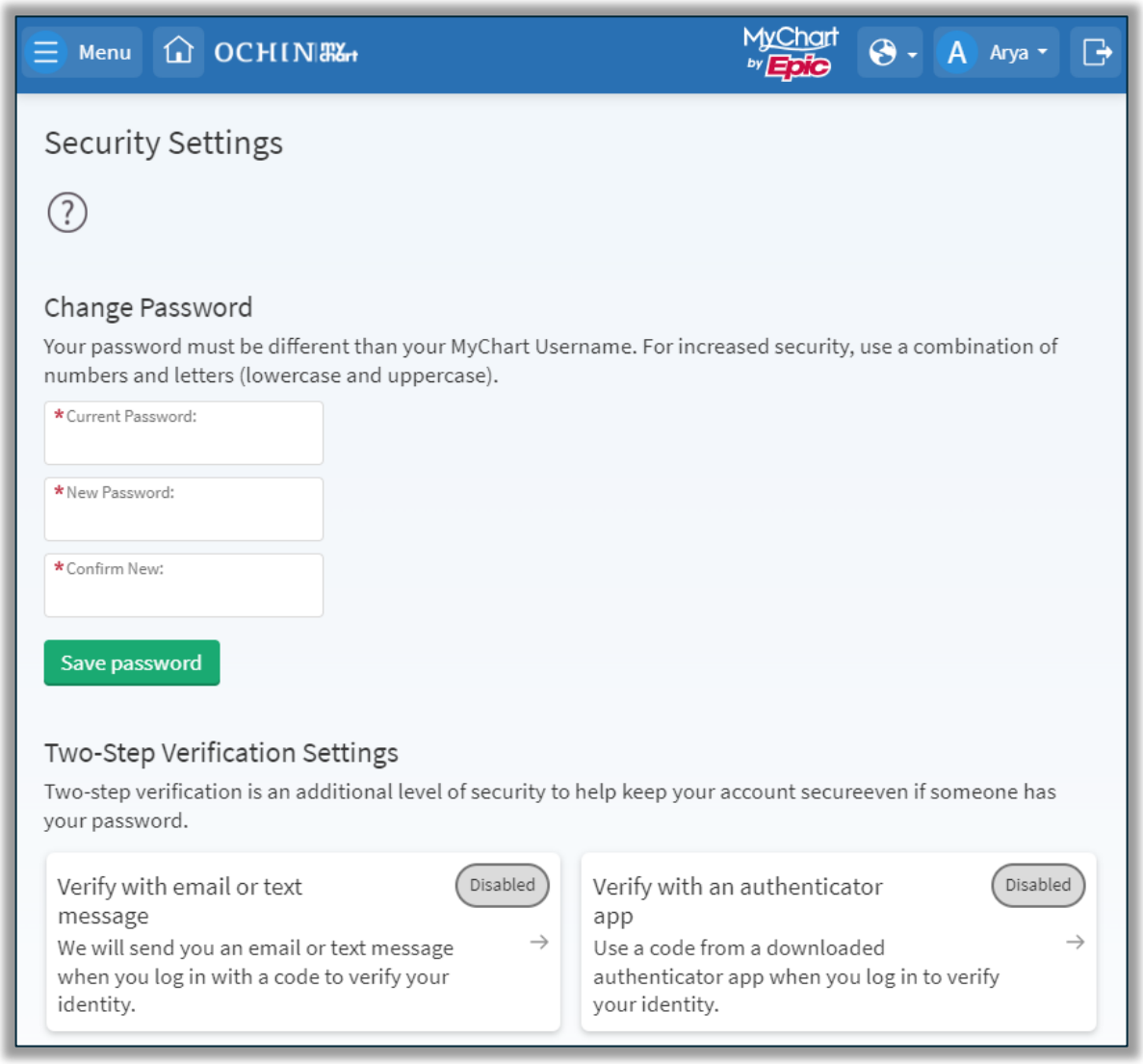
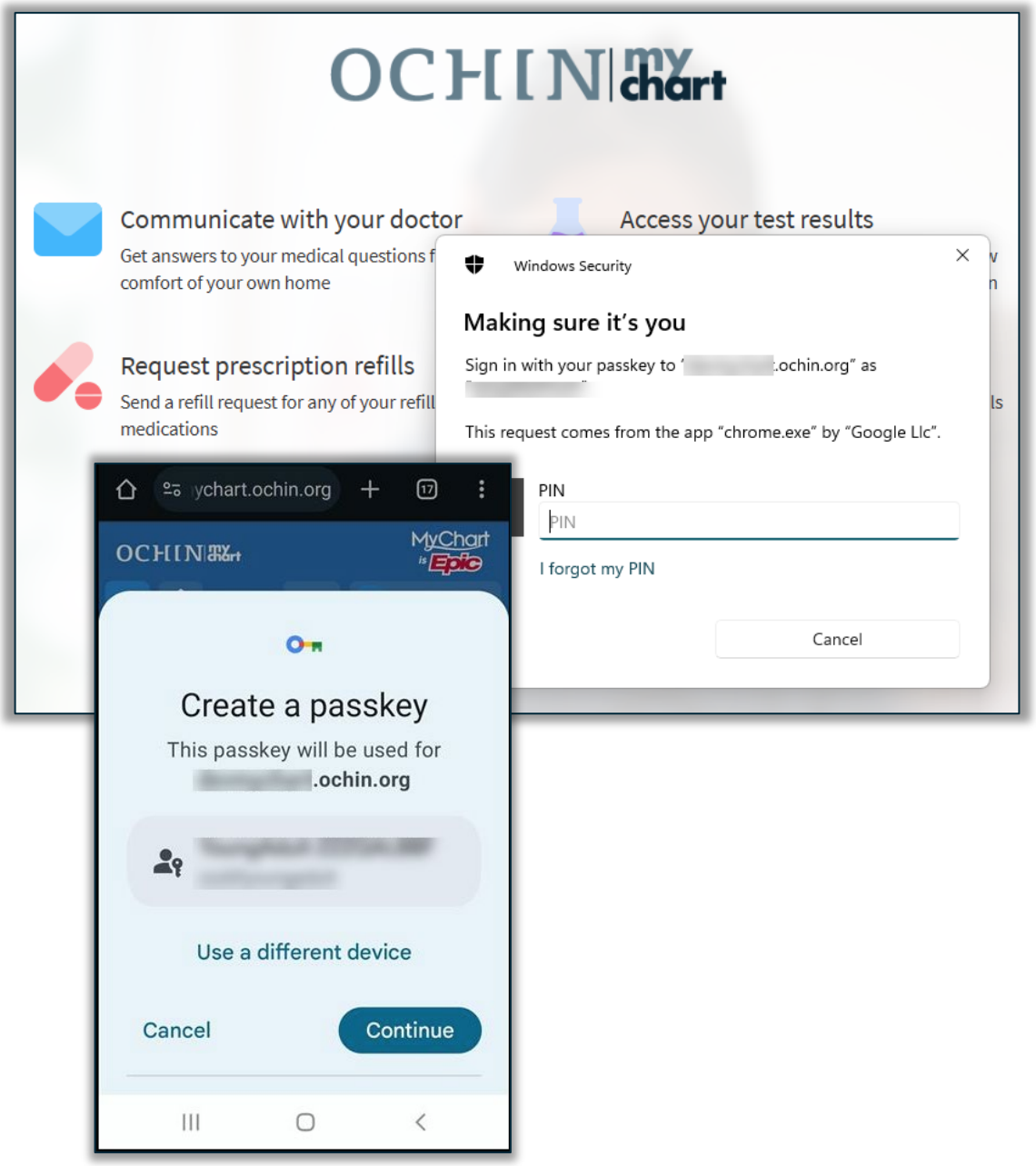
Security Settings

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

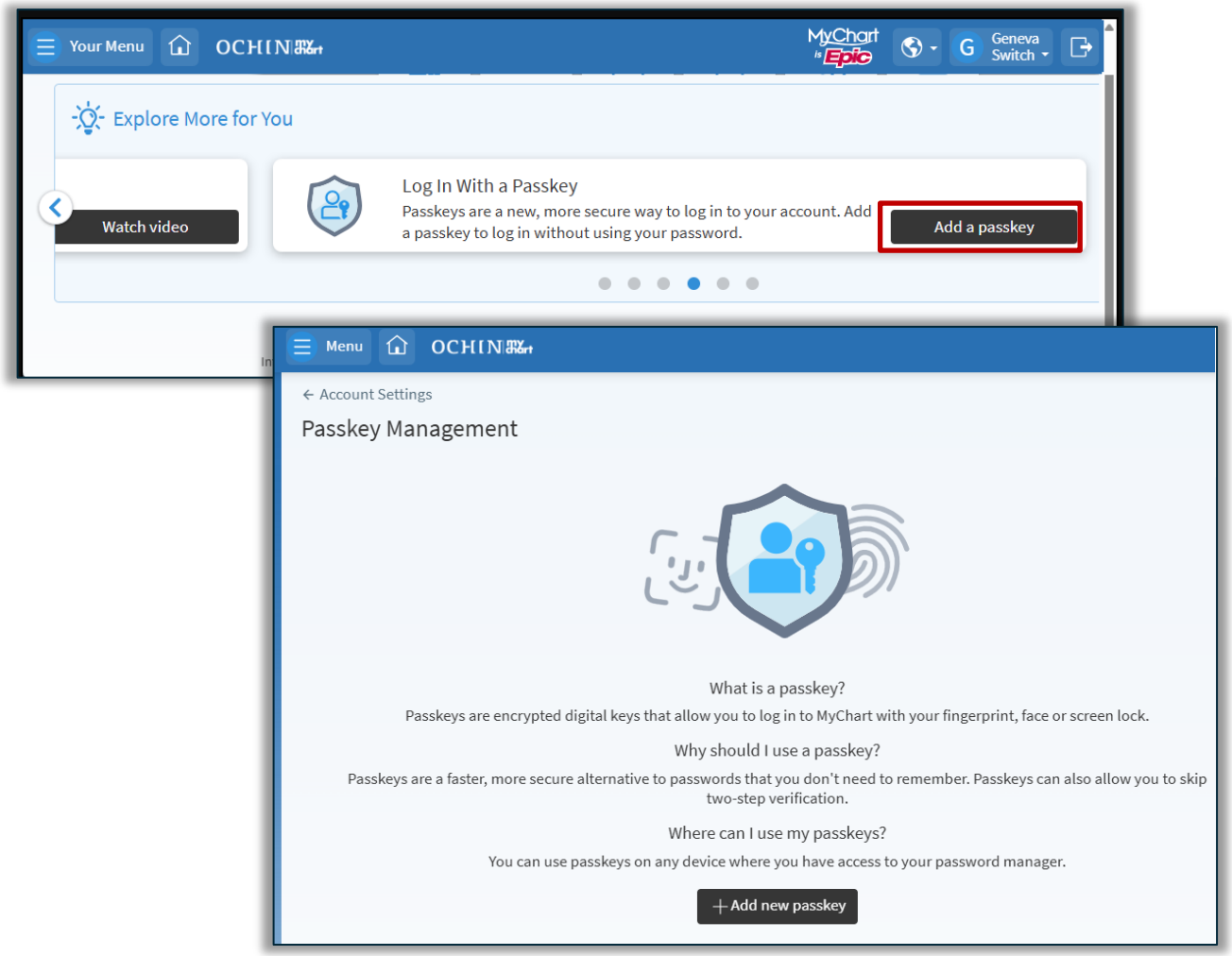


Passkey

A Passkey allows Secure access to the MyChart account by leveraging the security access for the computer or mobile device.



Select the **Add a passkey** in the Explore More for You section or from the menu, use path **Account Settings > Manage passkeys** to load the Passkey Management Page.

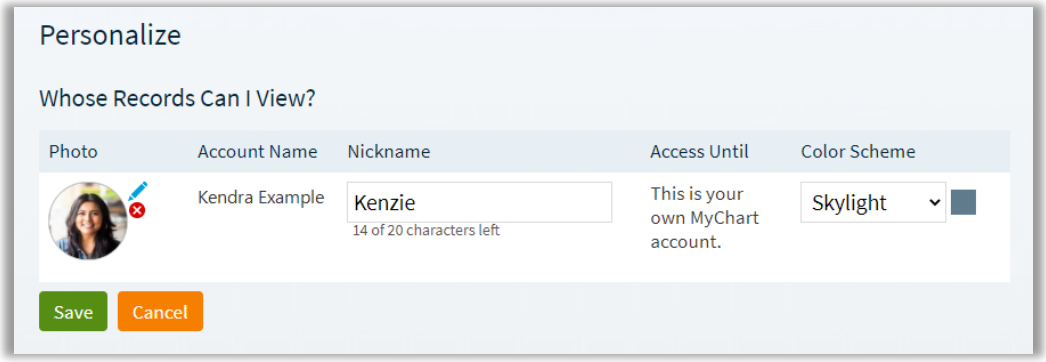


Passkeys for MyChart are unique to the device it is created on. Access from another device requires a Username and Password.

When a passkey is added a message is sent out via email to a computer or an SMS message to a mobile device to ensure the patient knows that they have set the passkey.

Personalize

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



Linked Apps and Devices

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

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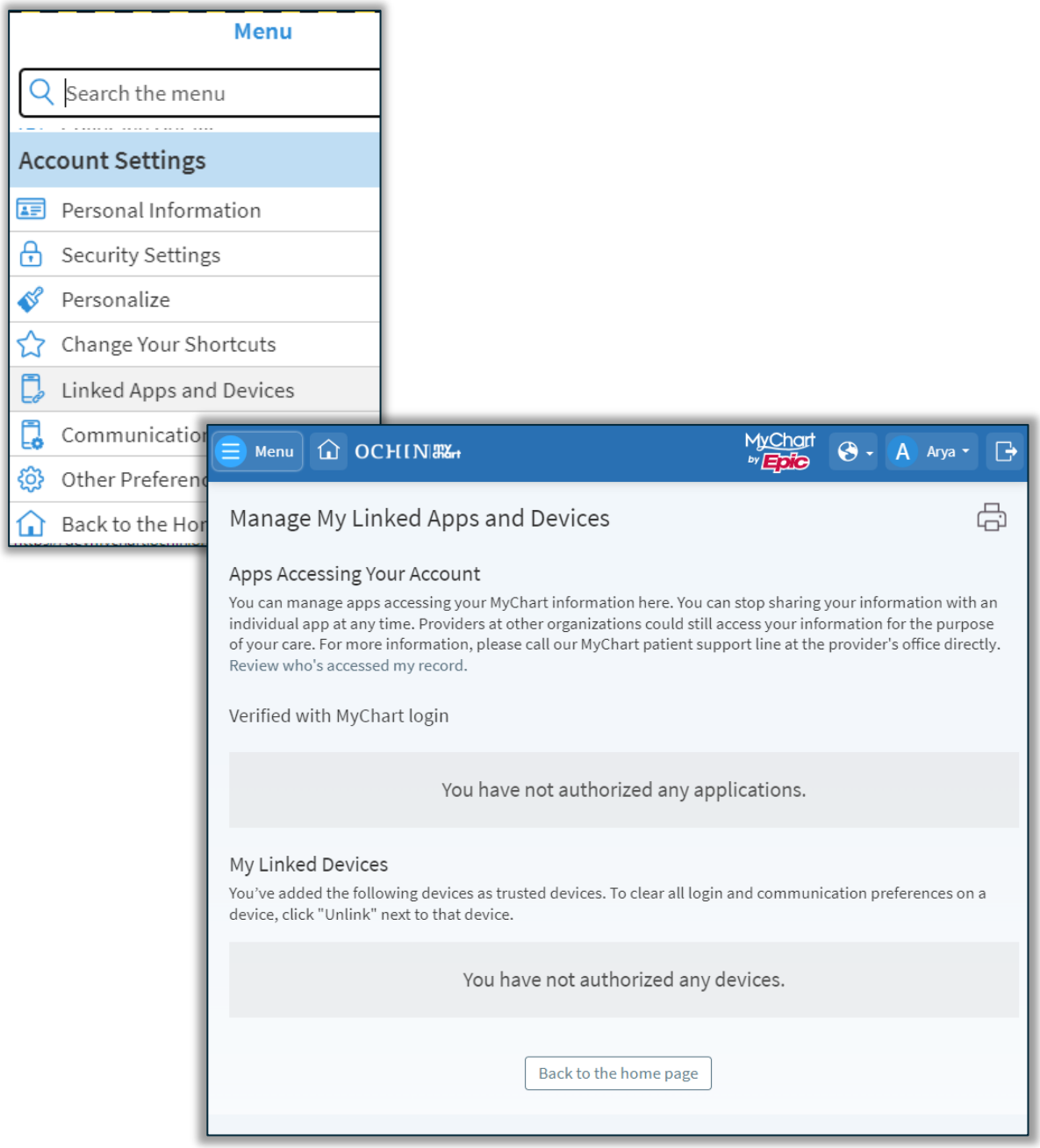
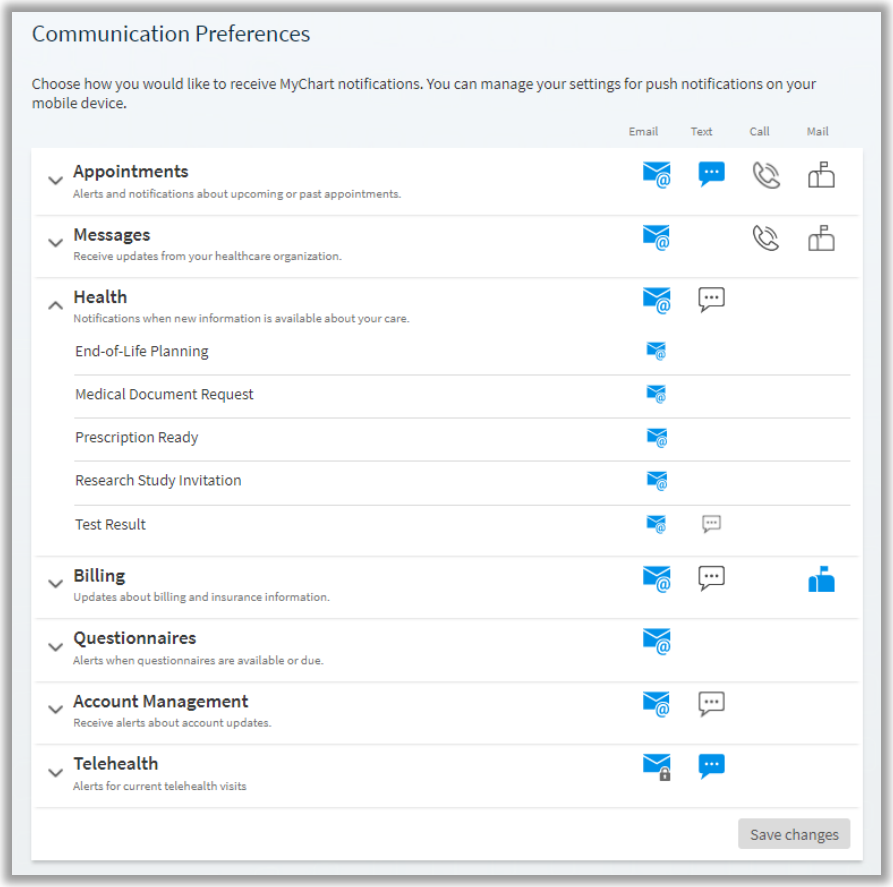


Communication Preferences

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

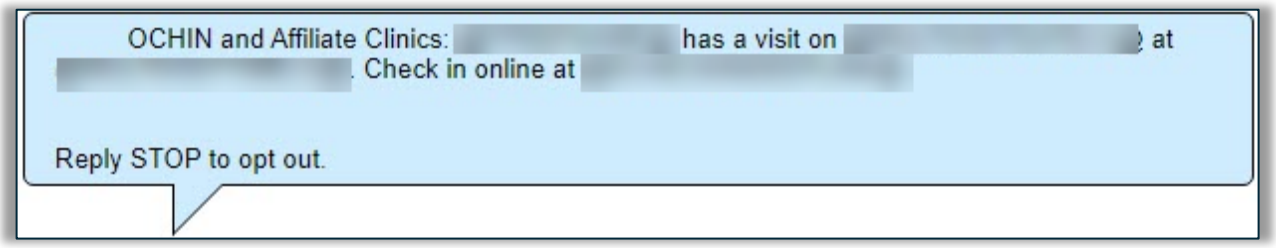
For each type of notification listed, click the icon to choose if you want to be notified by Email, Text, a phone call, or paper mail.



MyChart sends Auto-Instant Activation notifications upon appointment scheduling, check in, or a result release. These notifications are automatically triggered by patient or proxy actions, proximity to the scheduled appointment time, and relevant workflow actions.

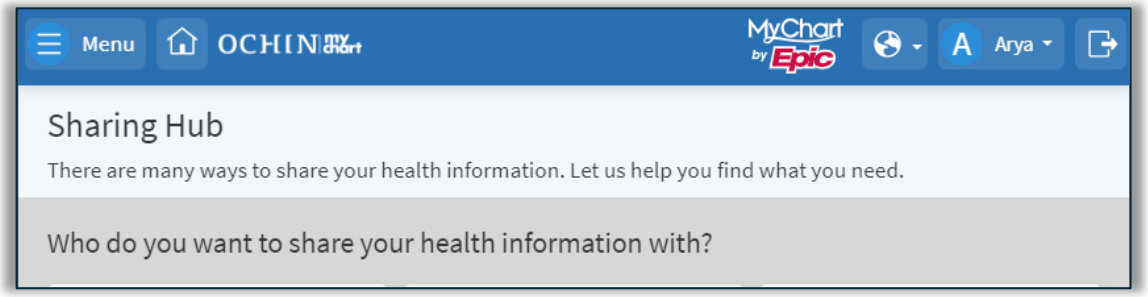
Some of these message types have the opt out feature as shown below.

- Mobile Number Changes
- Email Changed
- Verified Mobile Phone Cleared
- e-Check-In Notifications



MyChart Sharing Hub

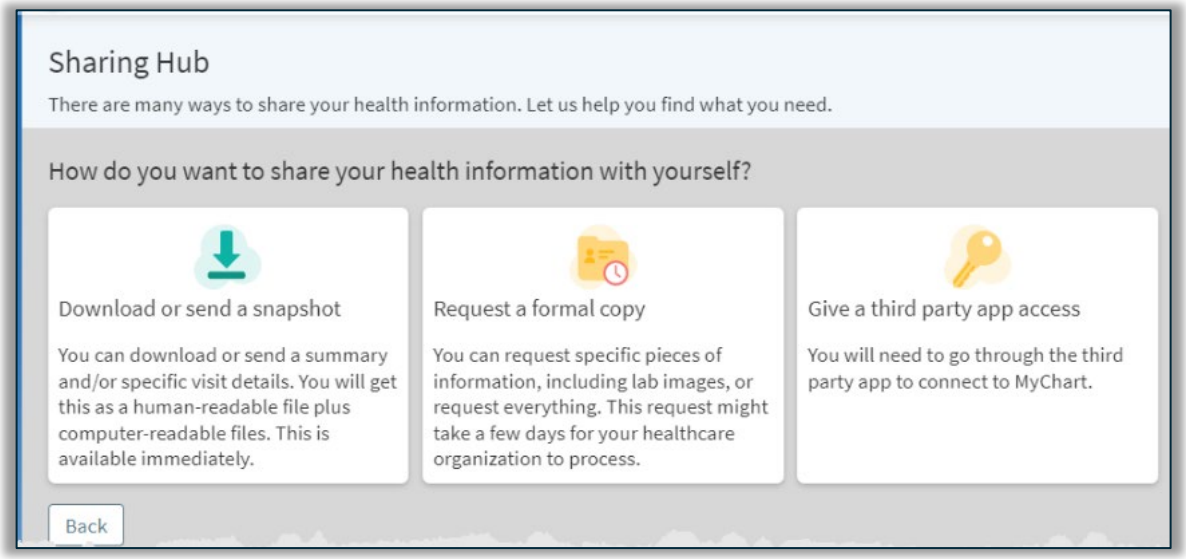
The MyChart Sharing Hub **Menu>Sharing>Sharing Hub** allows patients to share their health information with a family member, close friend or caretaker, a health care provider (dentist, nurse, or social worker), or a healthcare organization, and even share information with other organizations like their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



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.

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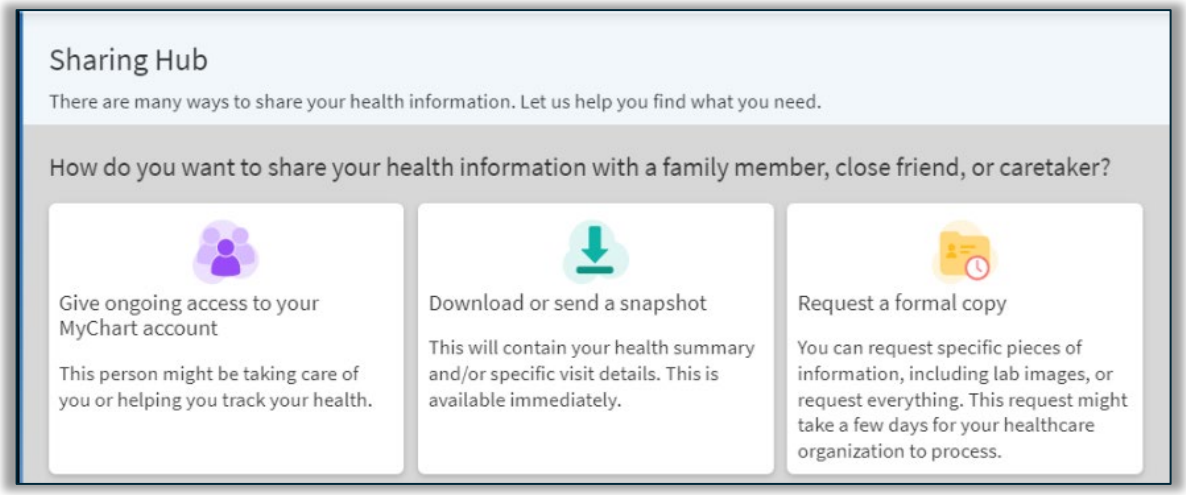
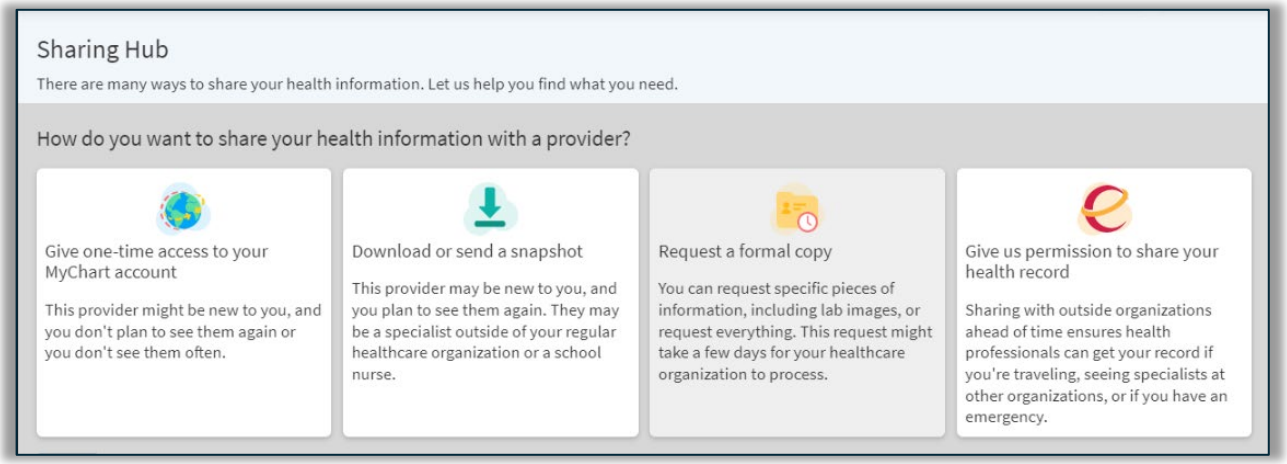


- **'A healthcare provider'** displays more options:
  - Give one-time access to your MyChart account..
  - Download or send a snapshot
  - Request a formal copy.
  - Give us permission to share your health record.



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

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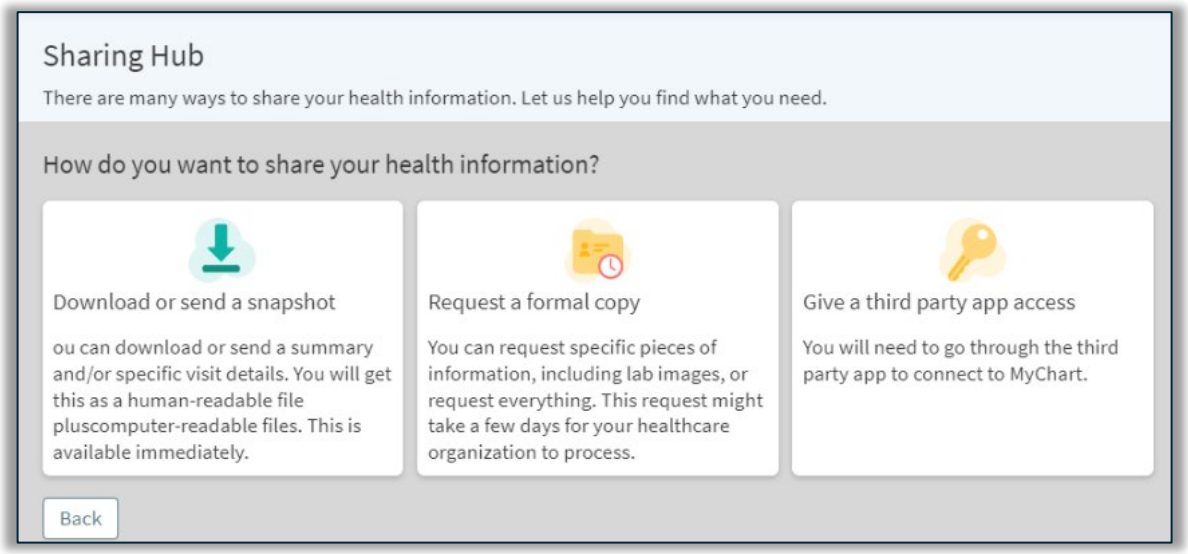
Sharing Hub
There are many ways to share your health information. Let us help you find what you need.
How do you want to share your health information?
Download or send a snapshot
ou can download or send a summary and/or specific visit details. You will get this as a human-readable file pluscomputer-readable files. This is available immediately.
Request a formal copy
You can request specific pieces of information, including lab images, or request everything. This request might take a few days for your healthcare organization to process.
Give a third party app access
You will need to go through the third party app to connect to MyChart.
Back