

## 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:

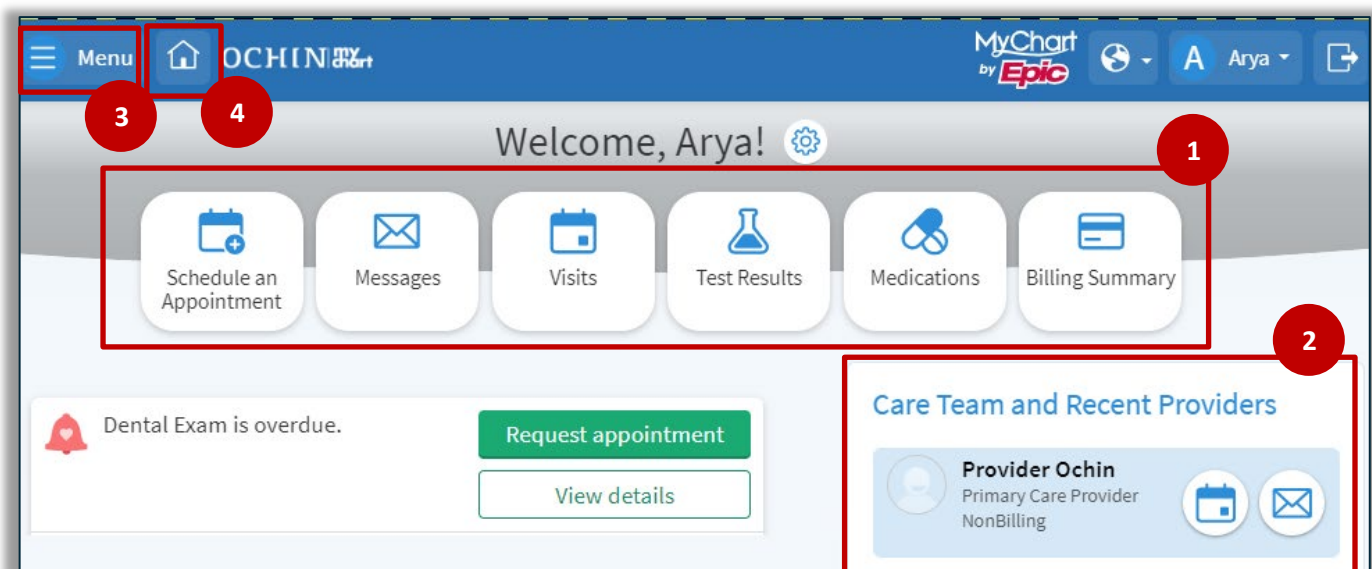
- View test results
- Request and manage appointments
- Pay medical bills
- Communicate with the doctor
- Request prescription refills

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.

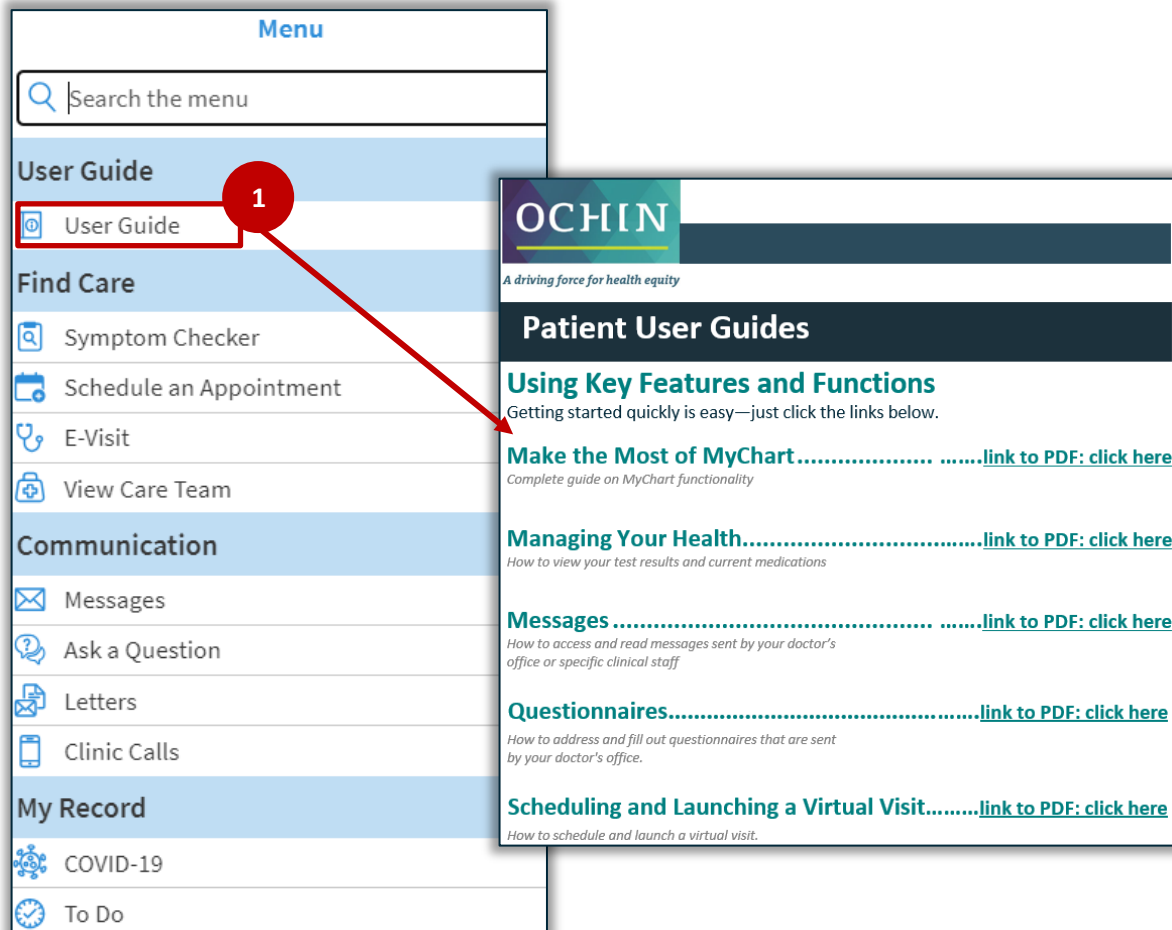
1. At the top of the page, are six shortcut tiles that allow you to navigate to the desired activity.
2. A viewing pane shows the **Care Team** and **Recent Providers** you have seen.
3. The **House** icon at the top of each page returns you to the home page.
4. Use the **Menu** dropdown to see other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



## Making the Most of MyChart User Guide

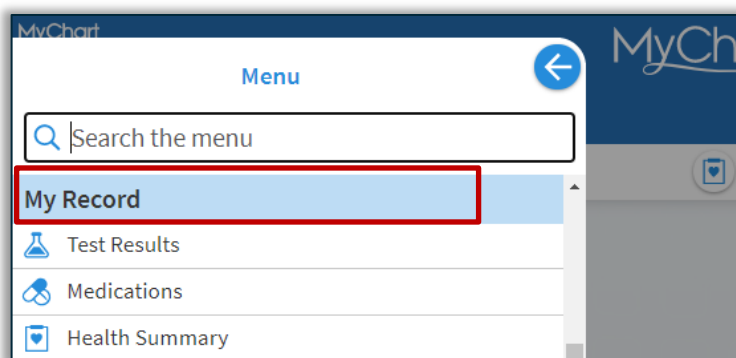
From **Menu**:

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.

Menu OCHIN MyChart

## Test Results

Search this list

| Test                                | Ordered By           | Date         |
|-------------------------------------|----------------------|--------------|
| TRANSVAGINAL SECOND TRIMESTER OB US | Ahmed Provider, MD   | Feb 24, 2021 |
| A1C, ALERE AFINION (POCT)           | Heather Provider, NP | Dec 4, 2020  |

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

HEMOGLOBIN, GLYCOSYLATED (A1C)  
Collected on March 24, 2022

Lab tests - Blood (Blood)

Results

**HGB A1C**  
Normal range: 4.0 - 5.6 %

5.0

4 5.6

View trends

Want more information about HEMOGLOBIN, GLYCOSYLATED (A1C)?  
Learn more

Additional information

Authorizing provider: Provider O  
Collection date: March 24, 2022  
Result date: March 24, 2022 12:17 PM  
Result status: Final  
Resulting lab: 310


Back to Test Results list

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

← Test Results List


## HEMOGLOBIN, HEMOPOINT H2 (POCT)

Collected on Mar 25, 2022 9:24 AM

 Ask a question


6

**New messages**


 Ursula Qabarnes  
 04/20/2022, 11:24 AM  
 Result notes mychart.

**Results** **New**

Notes recorded by Ursula Qabarnes on 4/18/2022 at 11:58 AM PDT  
QA testing needed.

 Learn more about HEMOGLOBIN, HEMOPOINT H2 (POCT)

Additional information ▼

**HEMOGLOBIN**  View trends  
 Normal range: 6 - 1 g/dL  
 Value 1 **Abnormal**



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

← Conversation List

## Test Result


Bookmark Move to trash


**Participants**


 Ursula Qabarnes  
 Ursula Zzzbarnes


**Related Information**

**Test Results**

 HEMOGLOBIN, HEMOPOINT H2 (POCT)

 New message

 Ursula Zzzbarnes  
 3:38 PM  
 Results are normal.

 You  
 3:18 PM  
 How was my results?

Reply

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

**Not Reviewed** ✕

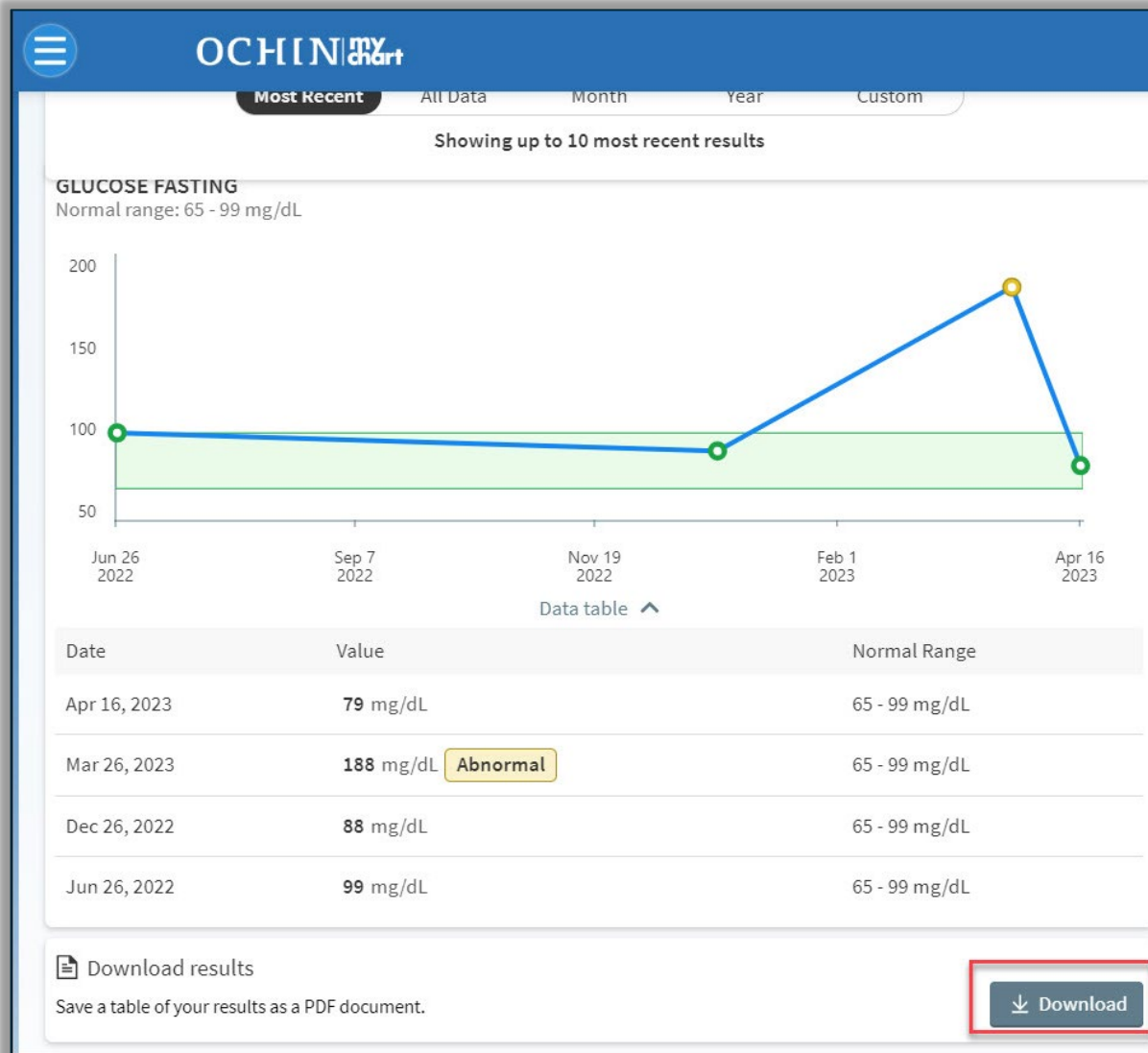
This test result was made available to you before your care team had a chance to review it.

OK

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 be 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.](#)

**2**

**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.





**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

Pickup time

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 (i)

**Delayed** Fill in progress (i)

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.

aspirin 81 mg DR tablet

Take 1 Tablet by mouth daily.  
Tome 1 tableta por via oral diariamente. ⓘ

You have another medication with the same name. ⓘ

Out of Stock ⓘ

Fill in progress ⓘ

2 refills before December 13, 2023

Prescription Details

Prescribed December 13, 2022  
Approved by Provider T

Refill Details

Quantity 30 Tablets  
Day supply 30

aspirin 81 mg DR tablet

Take 1 Tablet by mouth daily.  
Tome 1 tableta por via oral diariamente. ⓘ

You have another medication with the same name. ⓘ

Out of Stock ⓘ

This fill is delayed until the pharmacy receives more stock.

2 refills before December 13, 2023

- 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 Qaapplebaum

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

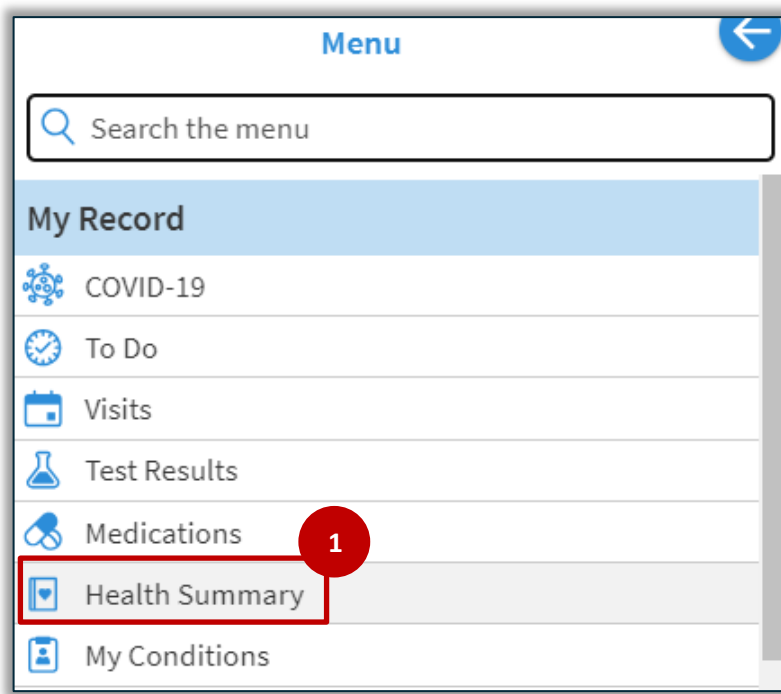
Remove

## Health Summary

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

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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<br>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

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## 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. | Date     | 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

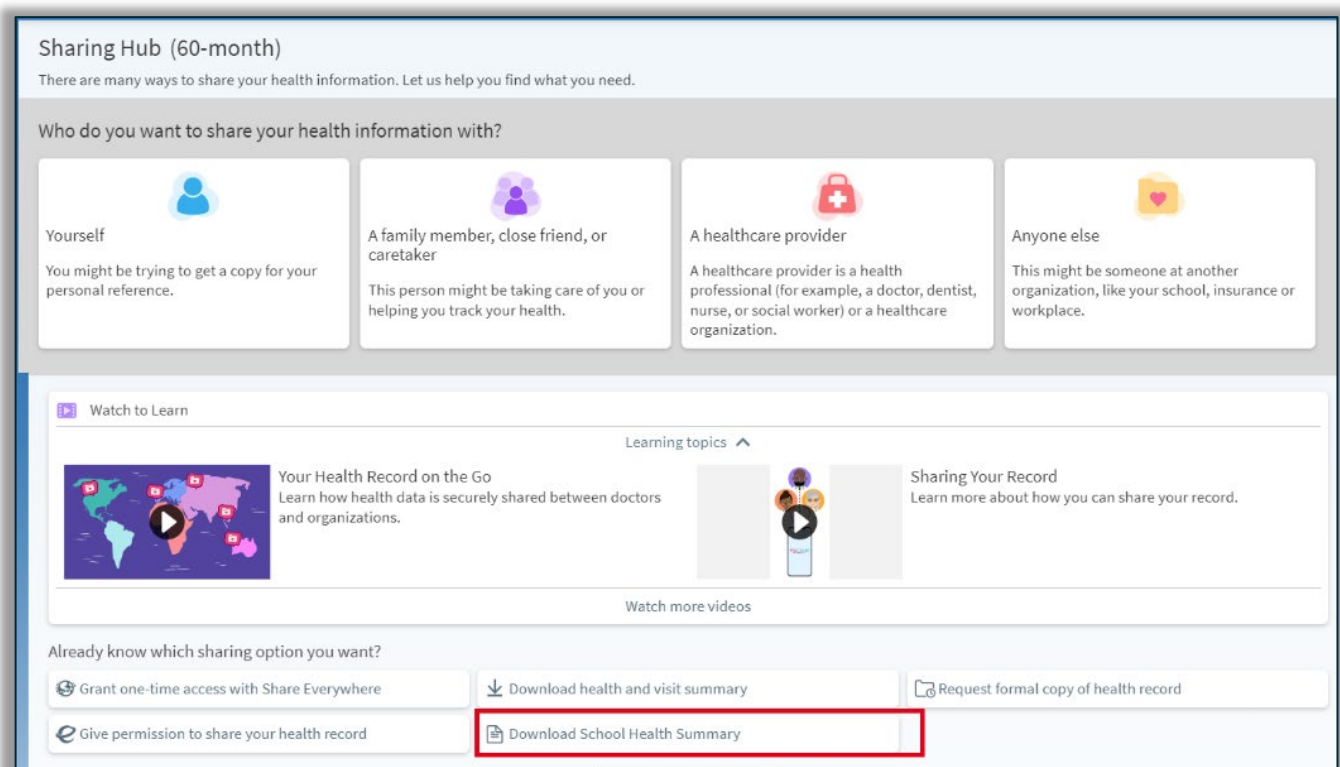
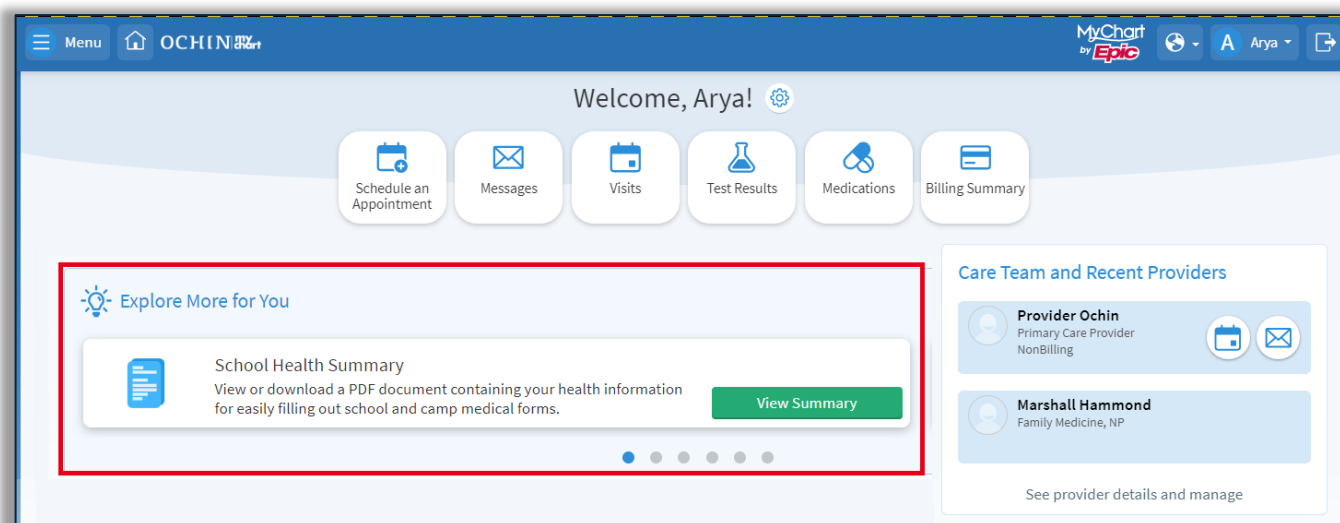
**Note:** The Dating Summary, Pregnancy Overview and Plan, and Prenatal Vitals only display information if the patient has an active pregnancy episode.

## 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.



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.

**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

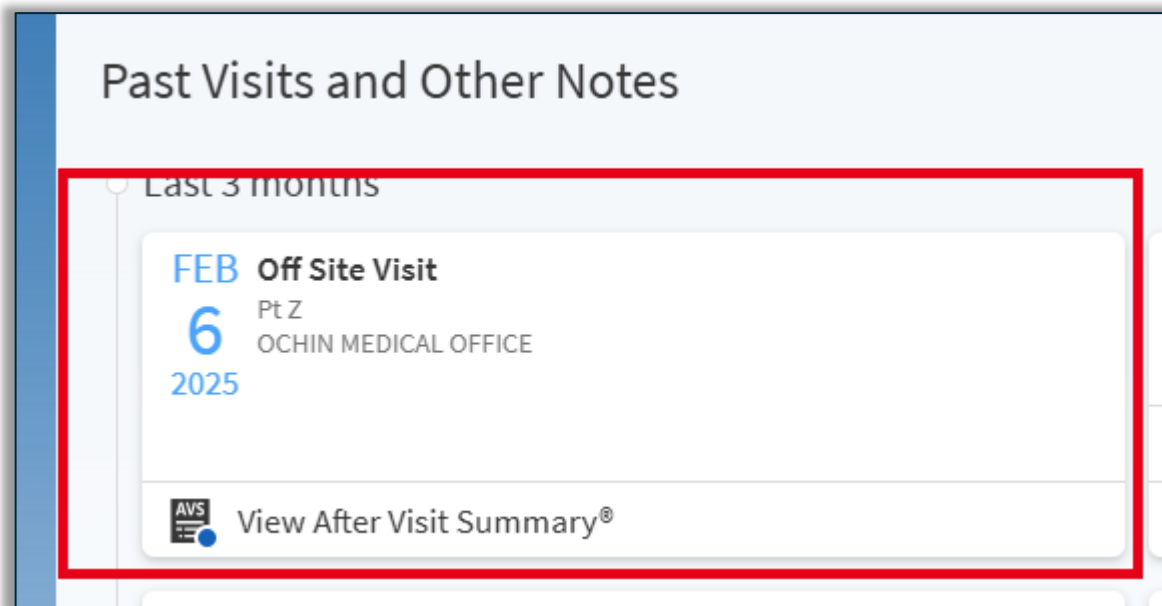
View notes  
 View After Visit Summary®

**MAY 21**  
2020

**BH/MH Visits**  
 Jenny Therapist  
 East Behavioral Health

View notes  
 View After Visit Summary®

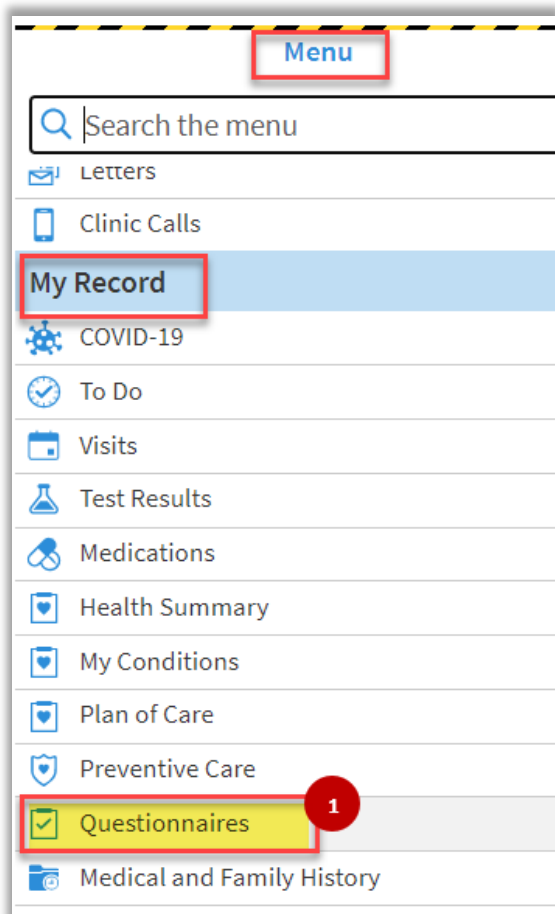
- This feature is available for Off Site Visits as well.



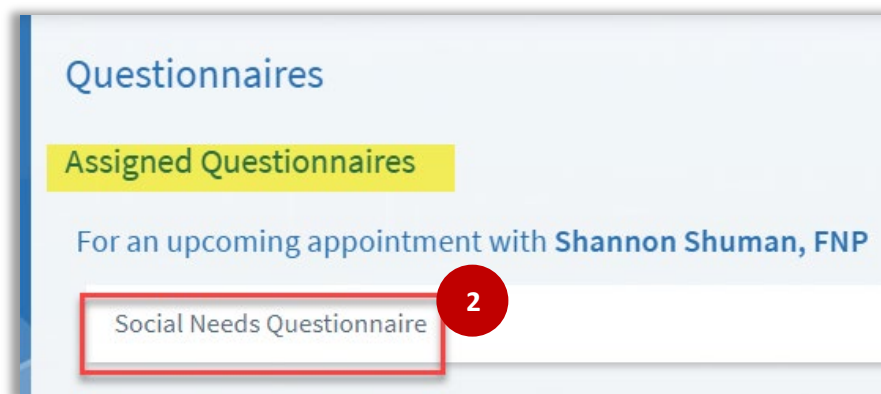
## Questionnaires

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

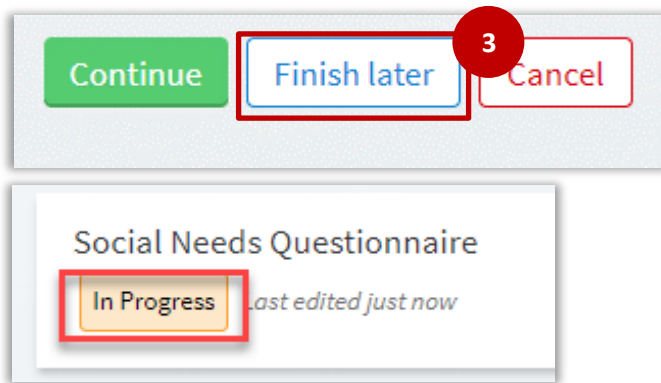
1. To see if a questionnaire has been sent to fill out prior to your visit, from the **Menu > My Record > Questionnaires**.



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.

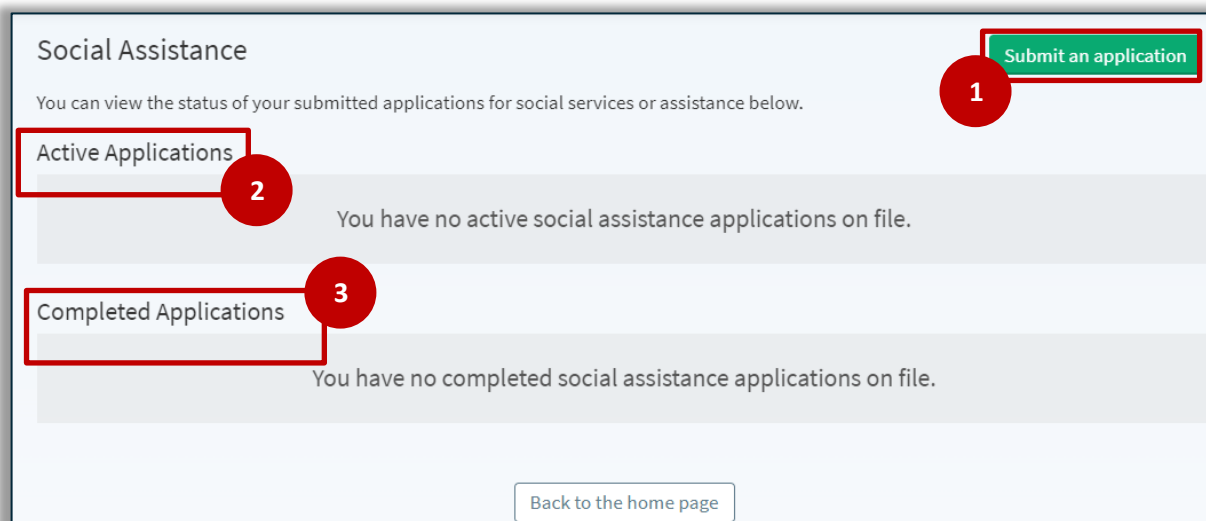


## Social Assistance

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.

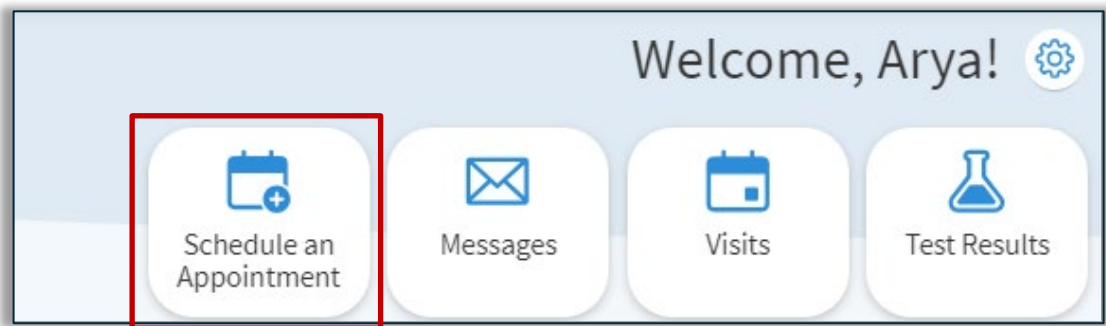


An application for social assistance can only be submitted once every 30 days. If a request is submitted before that timeframe, an error message will display in MyChart.

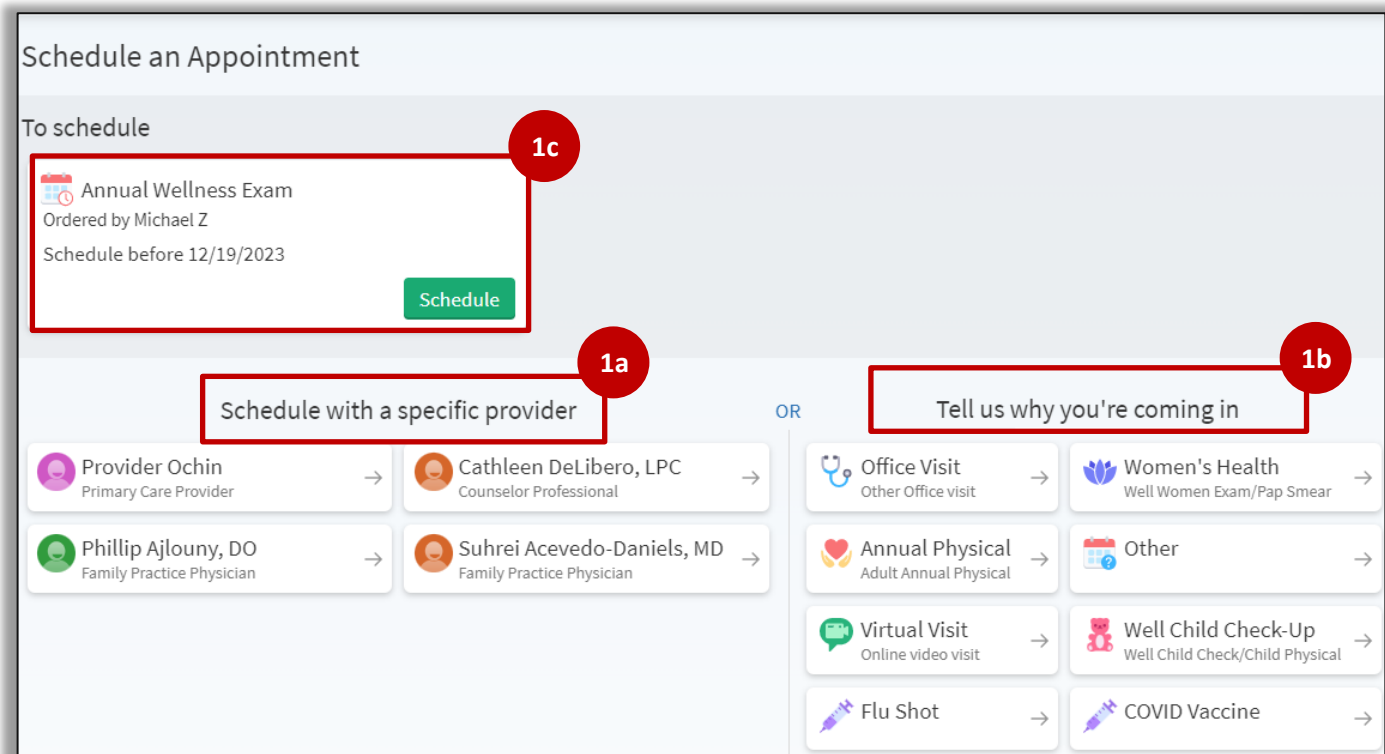
Patients who do not meet the qualifications receive a message displaying “There was a problem placing your application. Please contact your local social services office for assistance.”

# 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'. Each provider has a list of time slots from 1:00 PM to 4:45 PM. 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 checkboxes for 'Gender' (Female, Male) and 'Language' (English, Arabic, Chinese).

- 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. The grid includes: '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). Each option has a corresponding icon and a right-pointing arrow.

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](#)

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 Ochir  
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

Annual Physical  
Adult Annual Physical

Virtual Visit  
Online video visit

Flu Shot

E-Visits

Women's Health  
Well Women Exam/Pap Smear

Other

Well Child Check-Up  
Well Child Check/Child Physical

COVID Vaccine

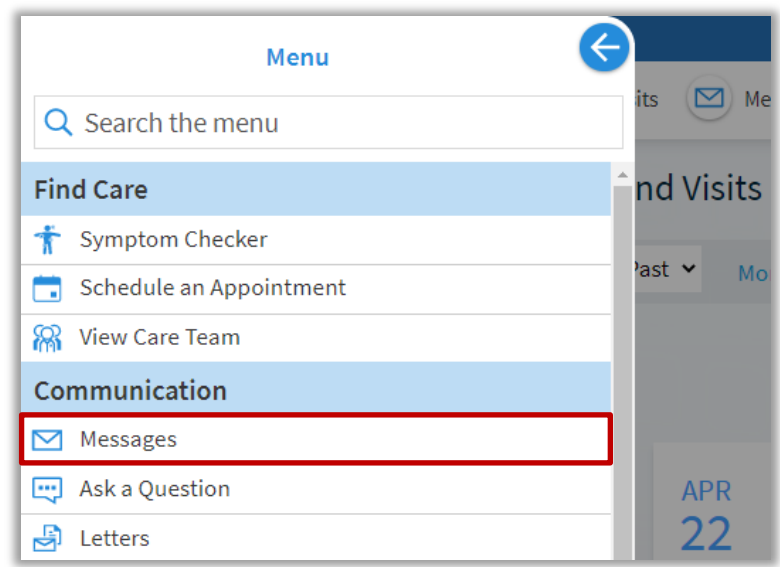
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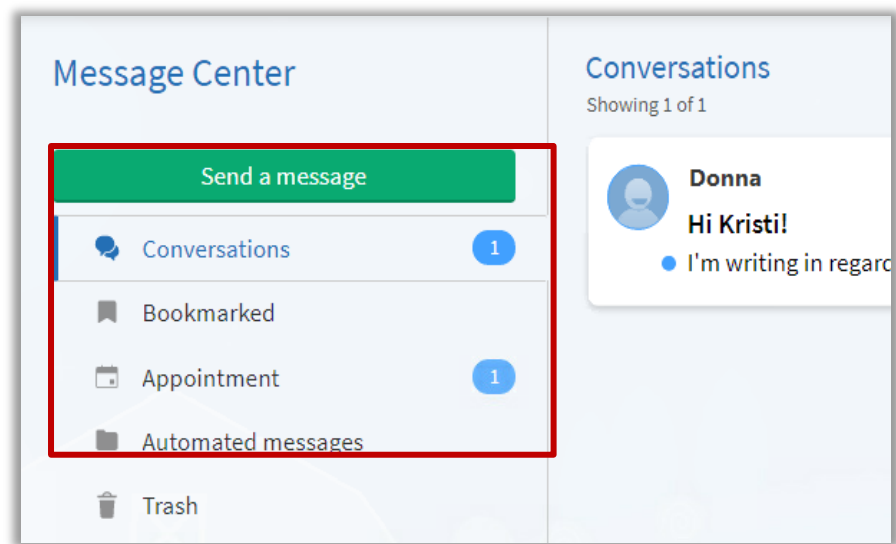
# Messaging

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



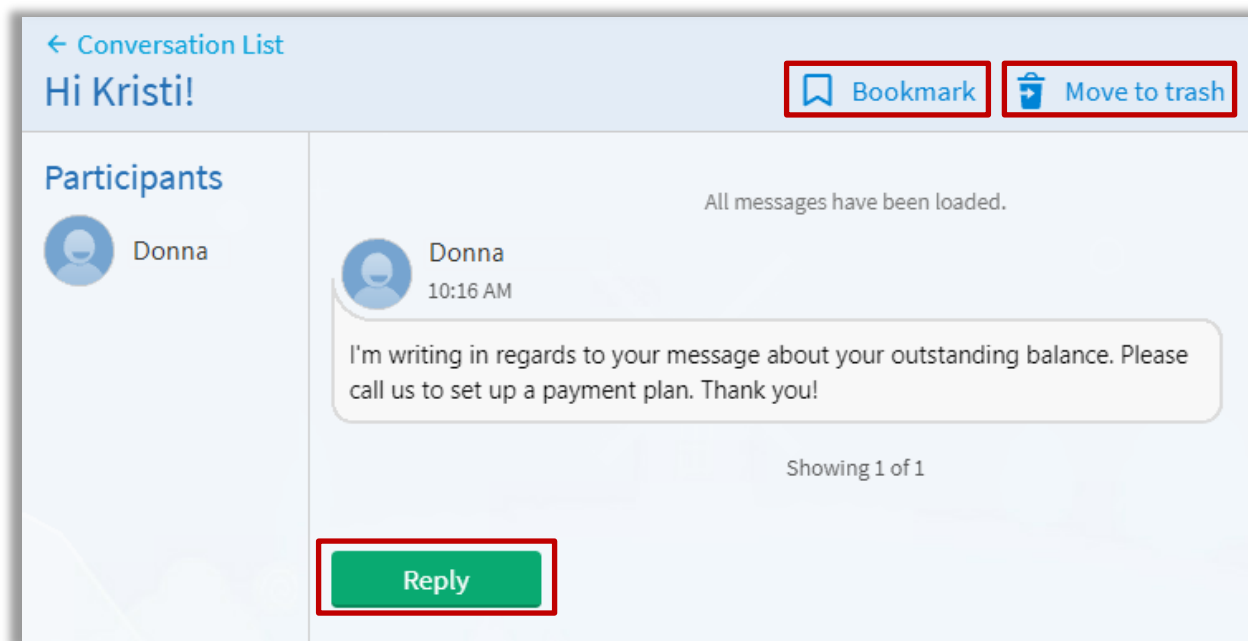
The Message Center includes five folders, displayed on the left sidebar:

- 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

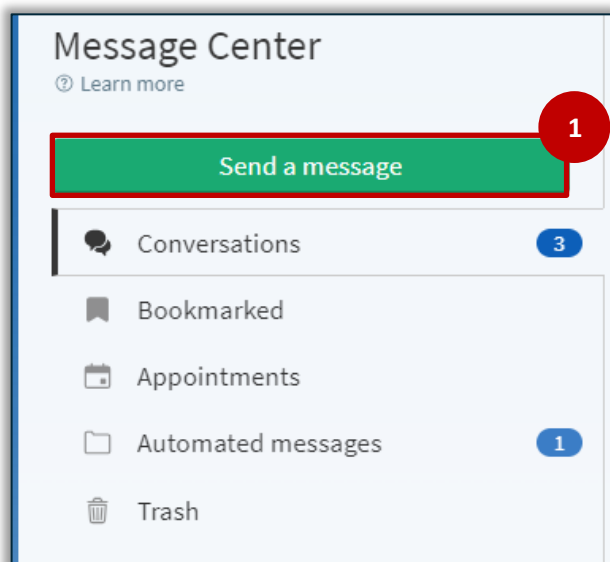
- Click a message from the Conversation List to view the details of the message.
- Click the **Reply** button to respond to the message.
- To flag a conversation for easy access in the future, click **Bookmark**. The conversation is flagged and appears in the Bookmarked folder.
- Click **Move to trash**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



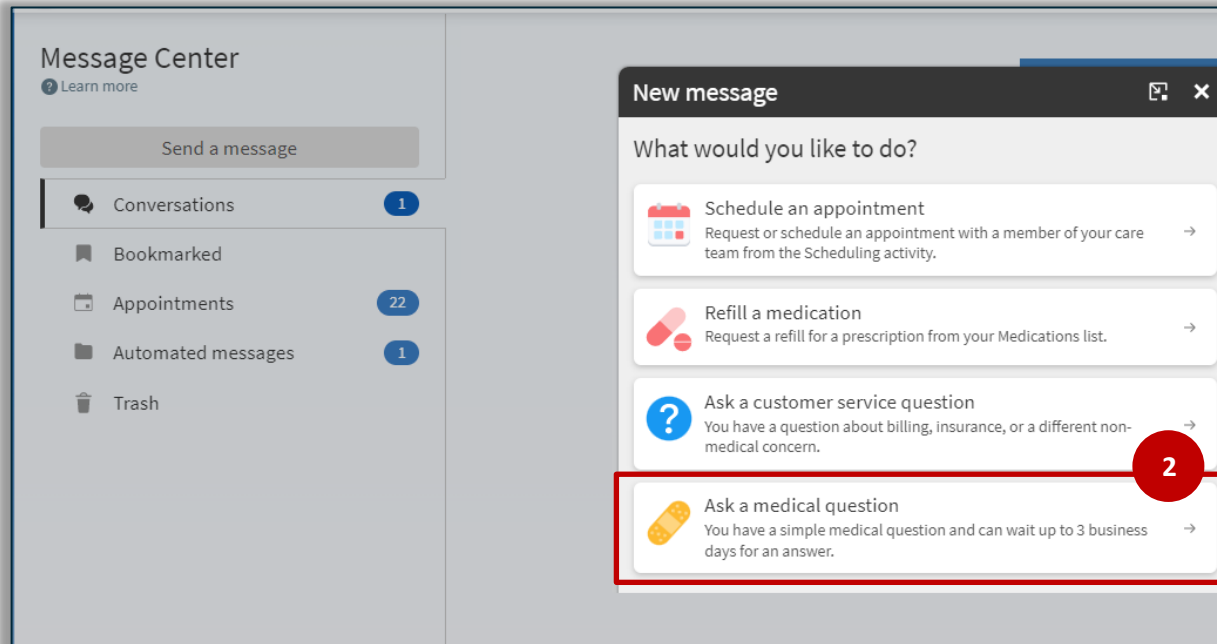
## Upload Pictures or Documents

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.



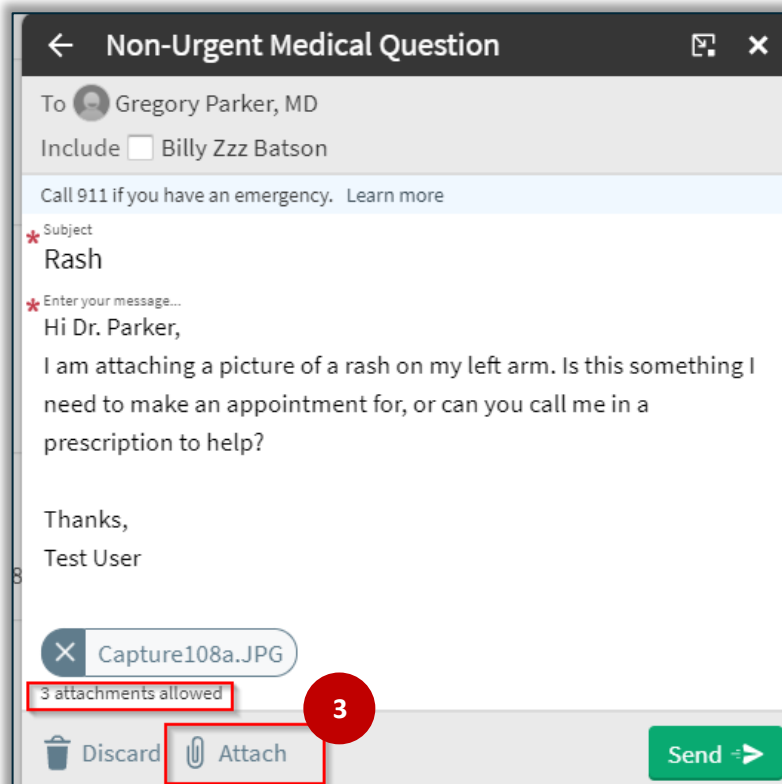
2. Click **Ask a medical question**.



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.



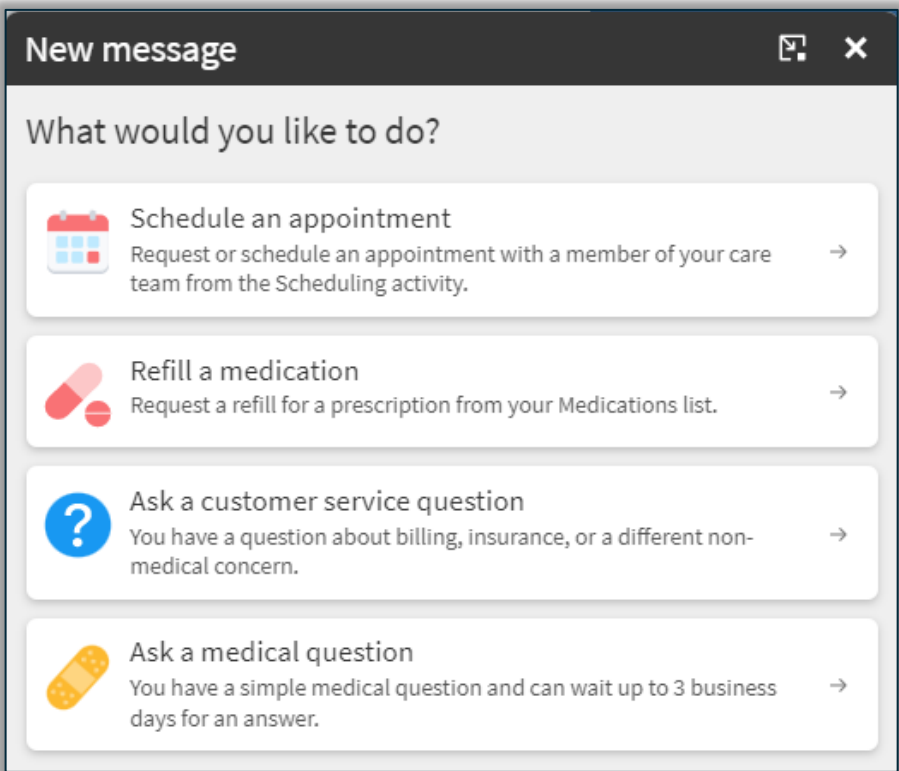
# Send a Message

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.

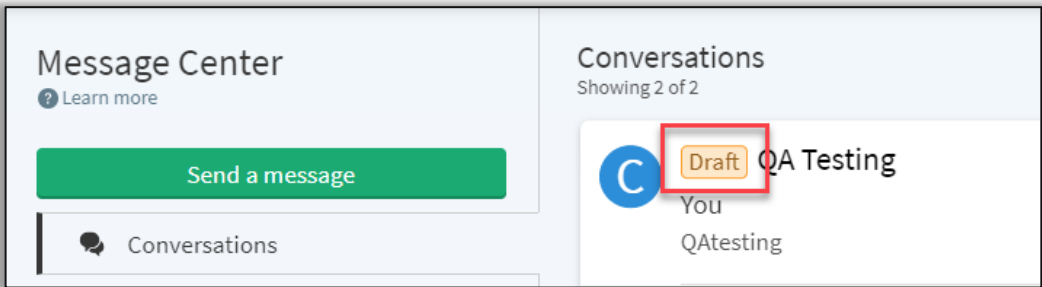
MyChart messages are secure, meaning your information stays private as it is sent over the Internet.

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

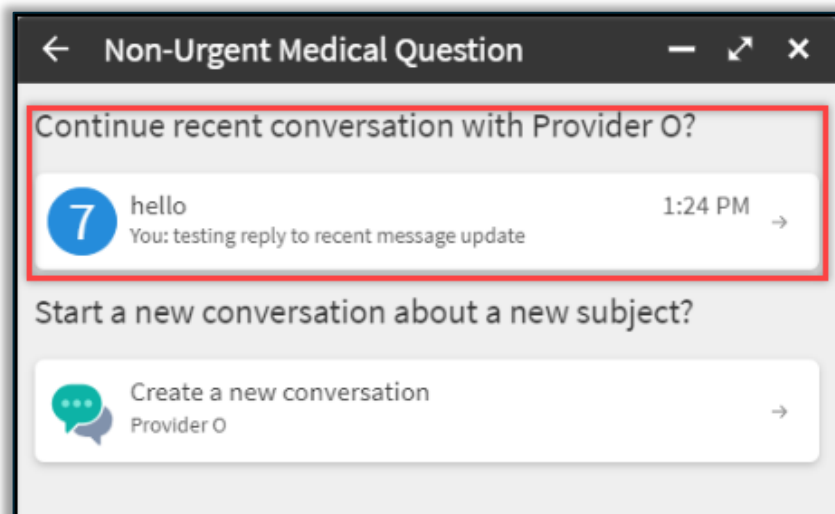
- **Medical Question:** allows you to send a message about non-urgent medical concerns, prescriptions, test results, and visit follow-up questions.
- **Customer service question** allows you to send a message about billing, insurance, referrals, website issues, or complaints.



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.



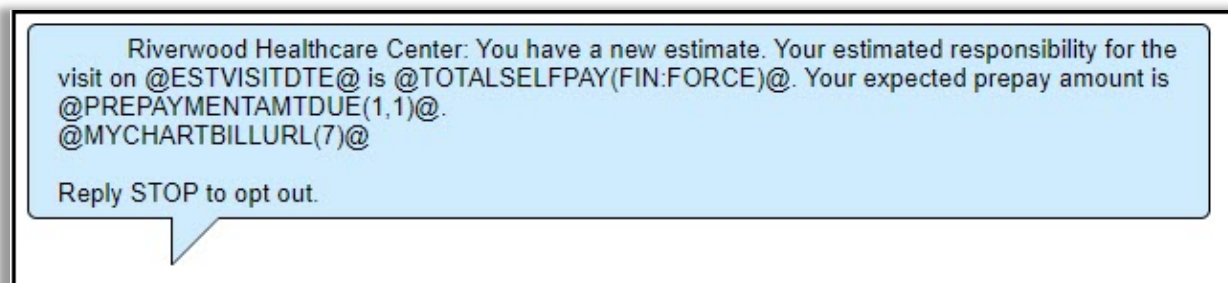
In addition, Medical Advice Requests from MyChart display a continue recent conversations option when a patient selects the same message type and provider within the past five days of a new conversation.



## Billing and Insurance

### 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.

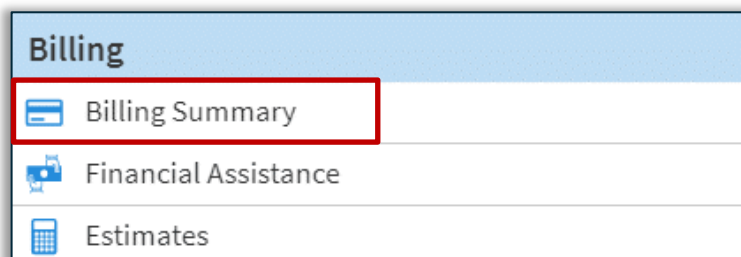
- **New Dental Estimate - Visit with Prepay Due and Prepay Discount:** is sent to the guarantor when an estimate is finalized with a prepay amount and prepay discount for a visit. The message contains a hyperlink to the MyChart Billing webpage.


## 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.

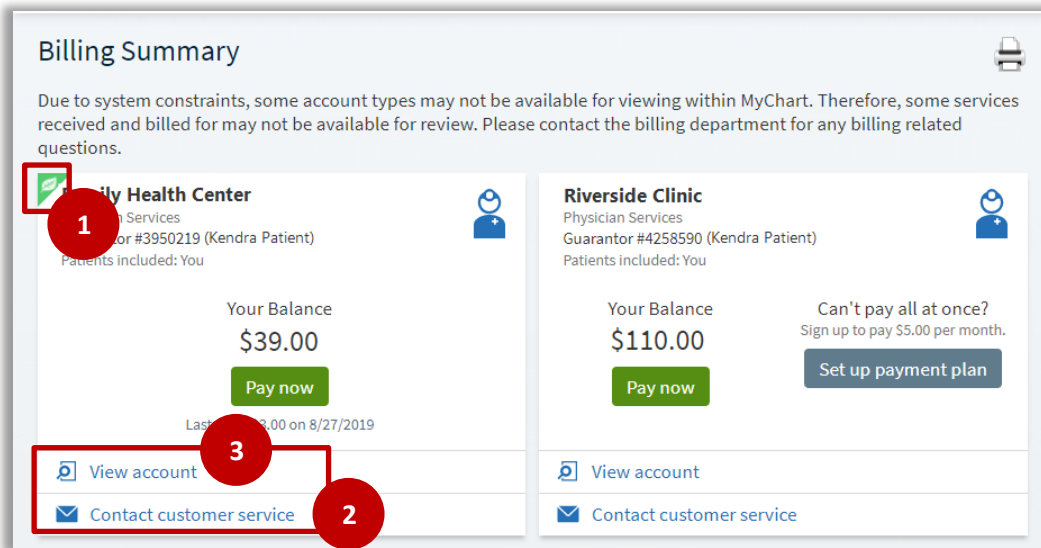
## Billing Summary

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.



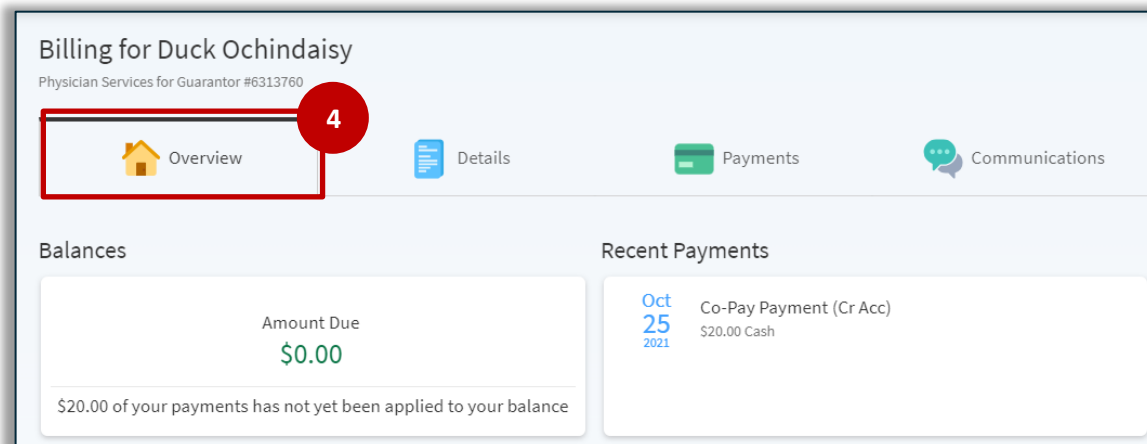
**Billing Summary**

Due to system constraints, some account types may not be available for viewing within MyChart. Therefore, some services received and billed for may not be available for review. Please contact the billing department for any billing related questions.

**1**  
**Family Health Center**  
Physician Services  
Guarantor #3950219 (Kendra Patient)  
Patients included: You  
  
Your Balance  
**\$39.00**  
**Pay now**  
  
Last payment \$9.00 on 8/27/2019  
**3**  
[View account](#)  
**2**  
[Contact customer service](#)

**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](#)

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



**Billing for Duck Ochindaisy**  
Physician Services for Guarantor #6313760

**4**  
 Overview

Details

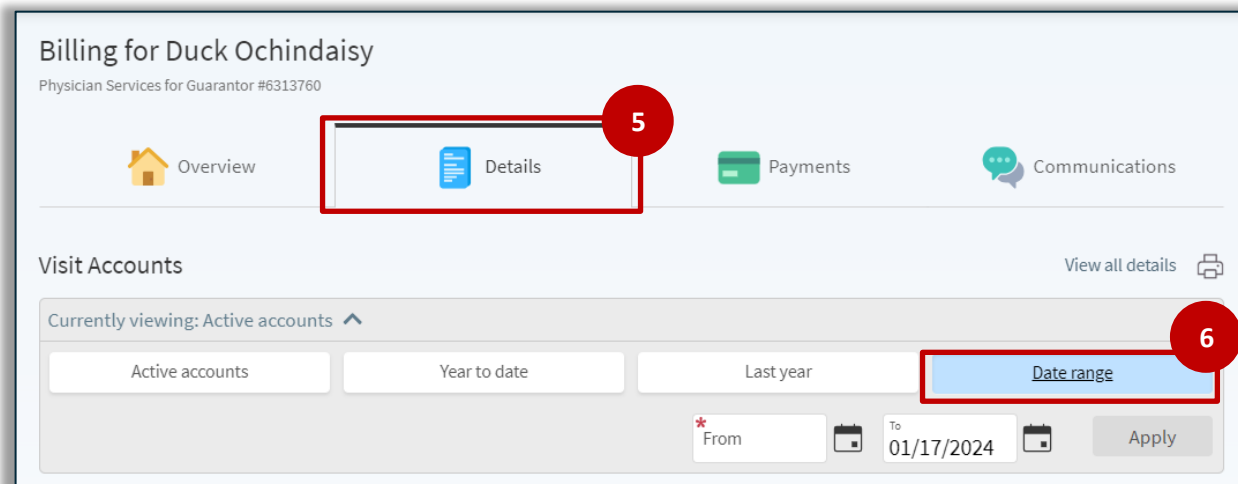
Payments

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

**5**  
 Details

Payments

Communications

**Visit Accounts** [View all details](#)

Currently viewing: Active accounts ^

Active accounts

Year to date

Last year

**6**  
[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?

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](#)

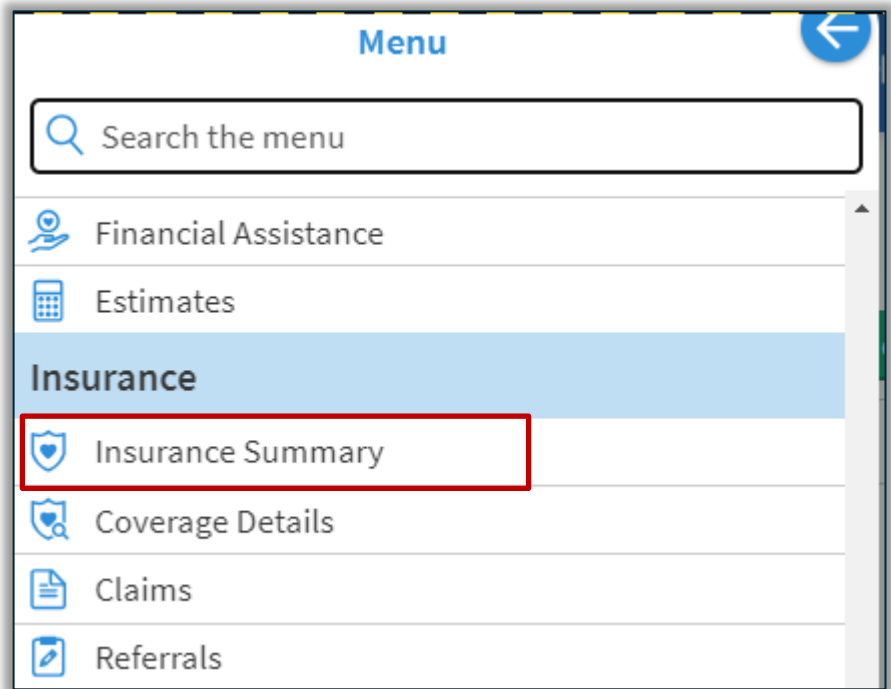
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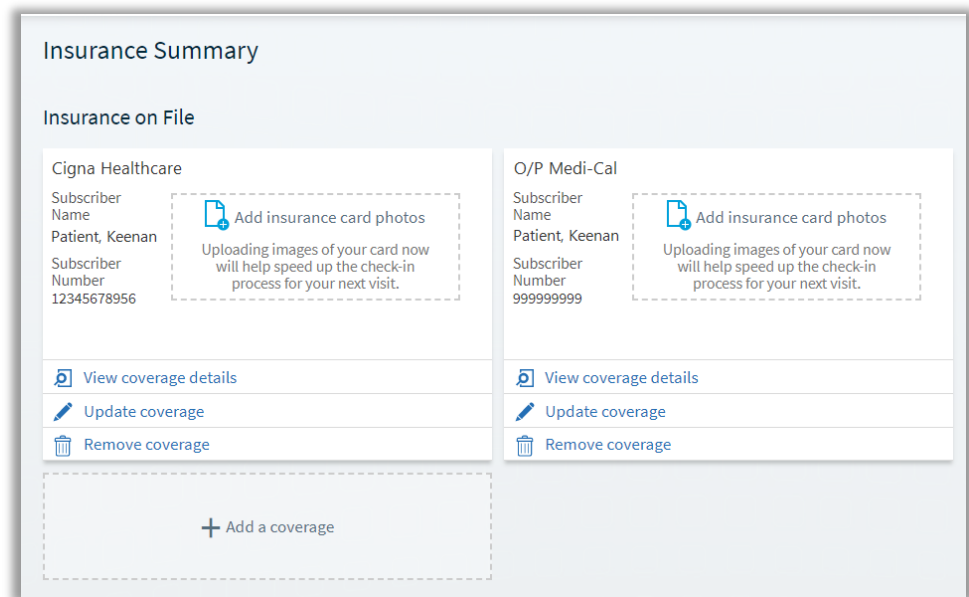
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# Update Insurance Information

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

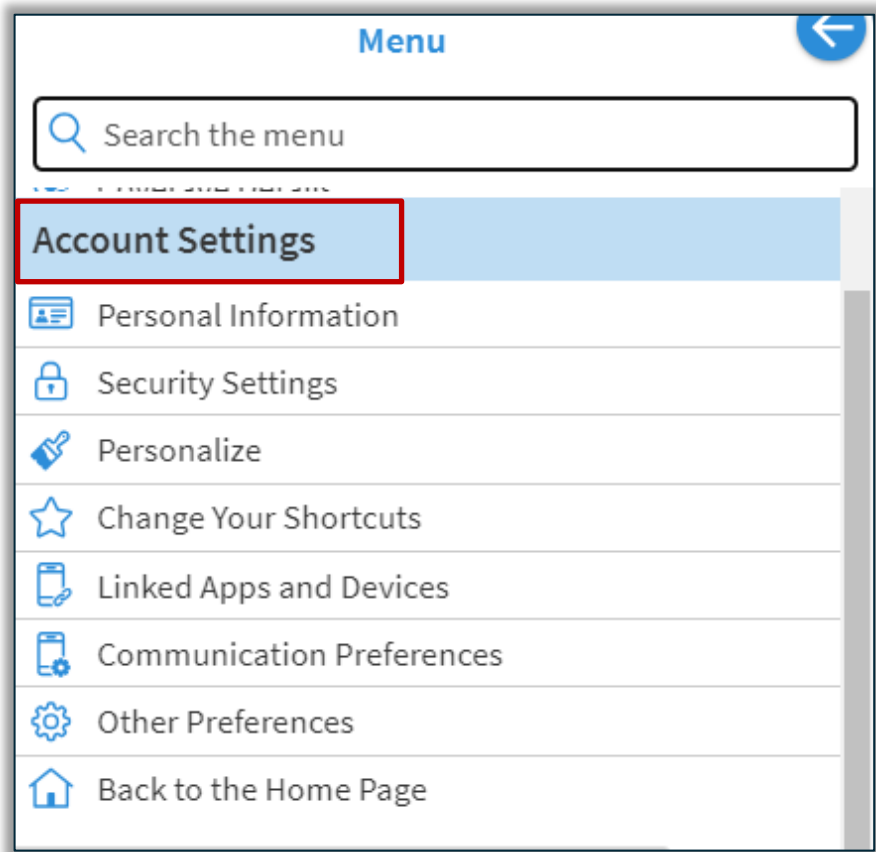


- Click **View coverage details** for the payer or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.
- Click **Update coverage** to request a change to an existing coverage.
- Click **Remove a coverage** to request it be removed.
- Click **Add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

### Personal Information

Please enter contact and personal information here, and click **Save Changes** to send a message to the clinic. Allow 24 hours for the information to be updated in the legal medical record.

#### Contact Information

123 Example Ln  
MYRTLE BEACH SC 29587

Going somewhere for a while?  
[Add a temporary address](#)

843-555-6666 (preferred)

843-222-3333

Work phone not entered

kendrapatient@me.com

Edit

#### Details About Me

Preferred First Name  
Not entered

Gender Identity  
Female

Sexual Orientation  
Bisexual

Race  
Pacific Islander

Legal Sex  
Female

Sex Assigned at Birth  
Female

Marital Status  
Single

Ethnicity  
Non-Hispanic

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# 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

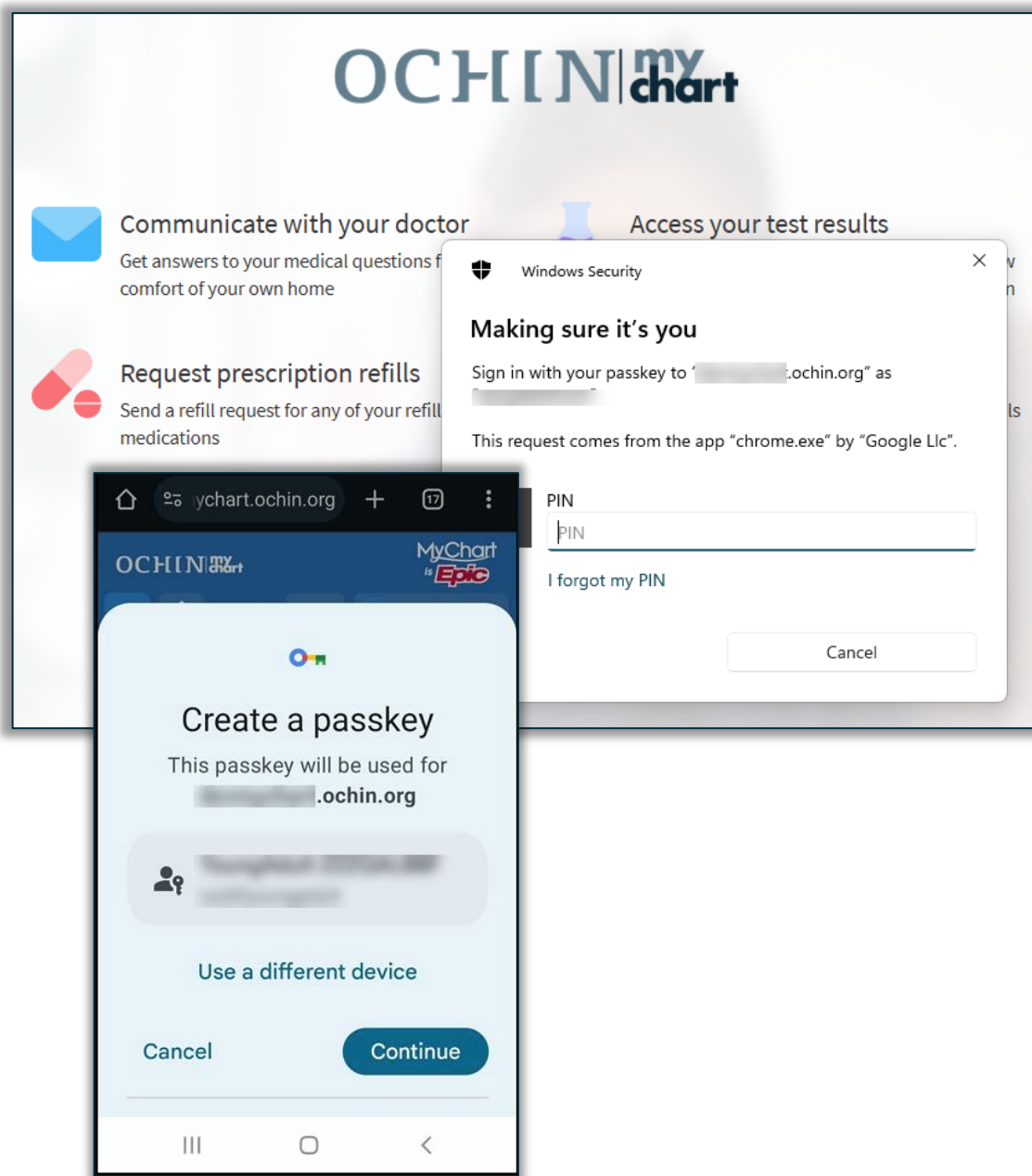
Disabled

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

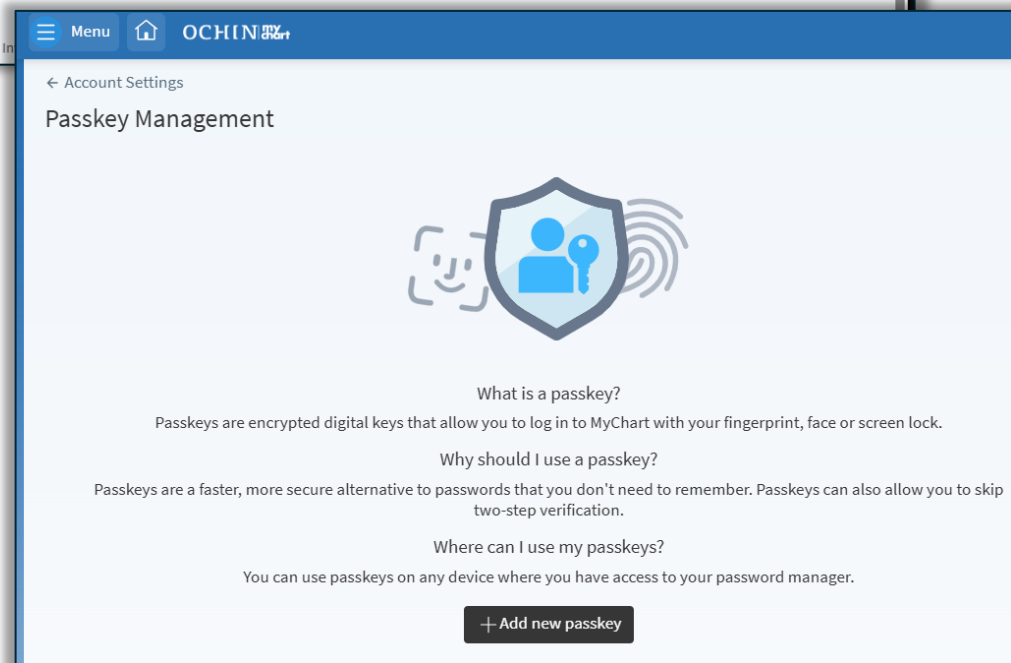
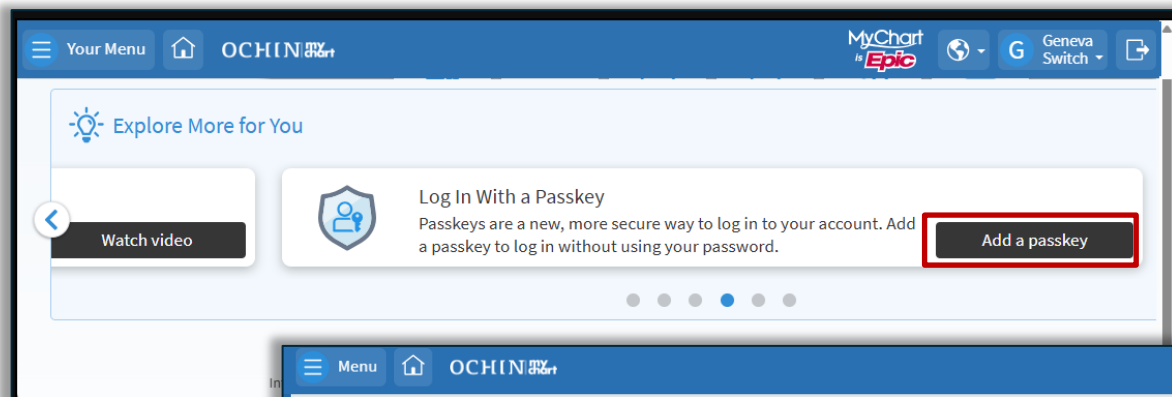
→

# 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.



### Personalize

Whose Records Can I View?

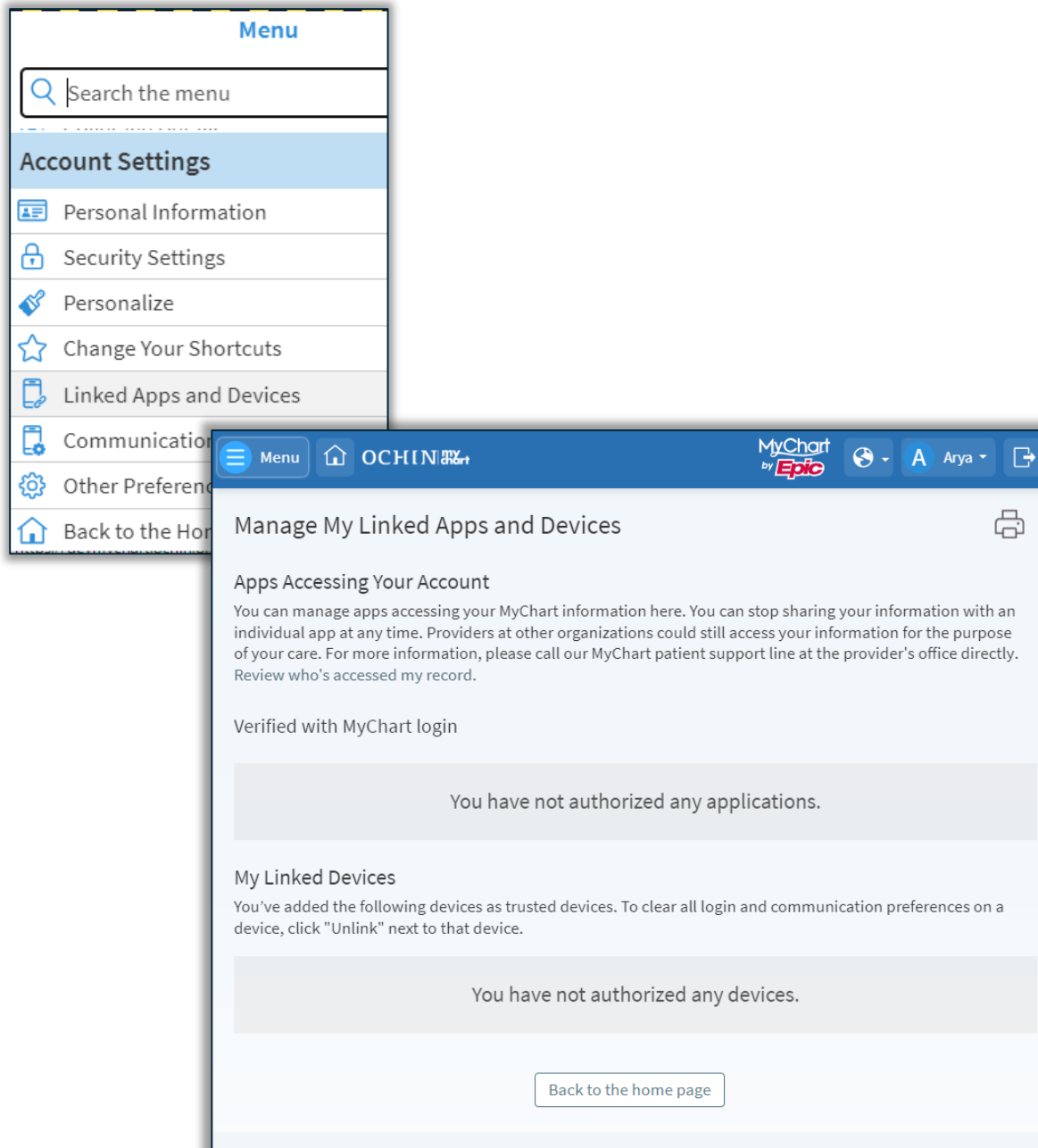
| Photo   | Account Name   | Nickname   | Access Until                      | Color Scheme        |
|---|----------------|--|-----------------------------------|---------------------|
|  | Kendra Example | <input type="text" value="Kenzie"/><br><small>14 of 20 characters left</small> | This is your own MyChart account. | <div>Skylight</div> |

Save

Cancel

## 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.

EmailCallMail

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.

EmailText

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 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

OCHIN and Affiliate Clinics: [redacted] has a visit on [redacted] at [redacted]. Check in online at [redacted]

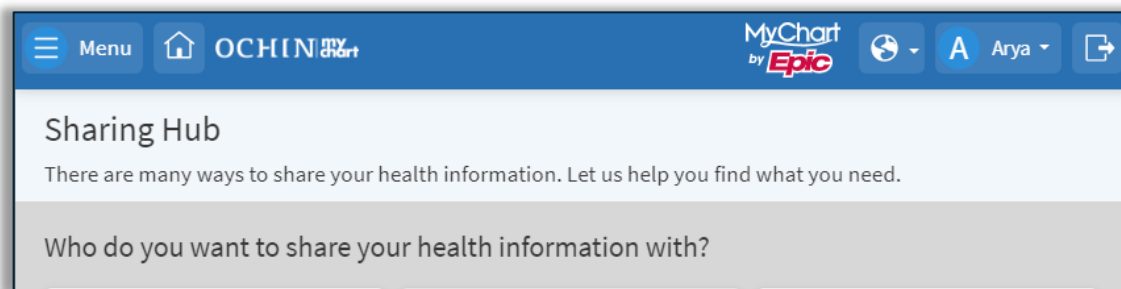
Reply STOP to opt out.

## MyChart Sharing Hub

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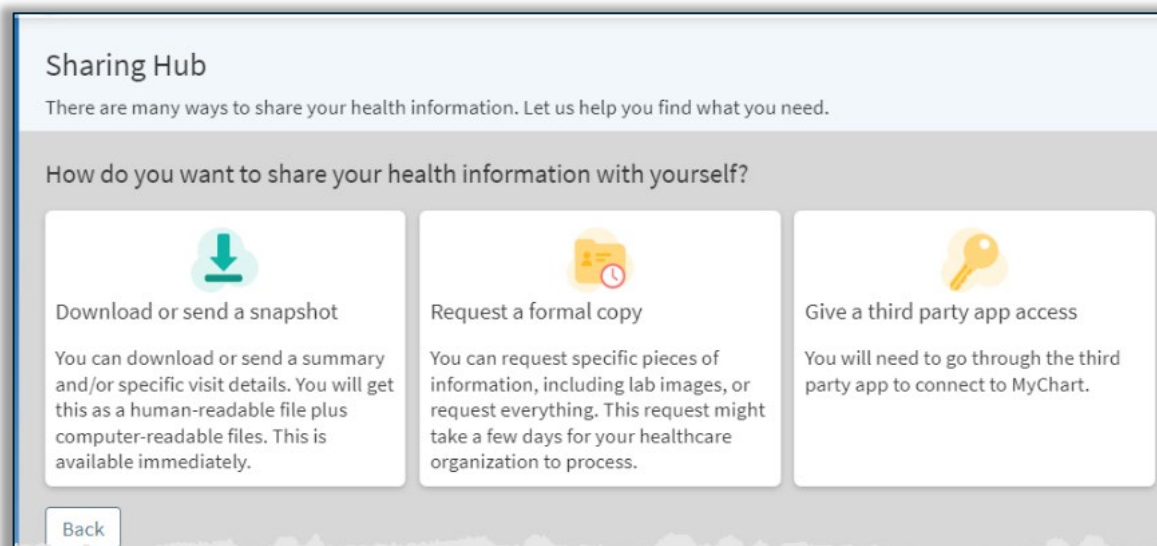
The MyChart Sharing Hub **Menu>Sharing>Sharing Hub** allows patients to share their health information with a family member, close friend or caretaker, a health care provider (dentist, nurse, or social worker), or a healthcare organization, and even share information with other organizations like their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

## 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 with a family member, close friend, or caretaker?




**Give ongoing access to your MyChart account**

This person might be taking care of you or helping you track your health.



**Download or send a snapshot**

This will contain your health summary and/or specific visit details. 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.

- **'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.

## 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 with a provider?




**Give one-time access to your MyChart account**

This provider might be new to you, and you don't plan to see them again or you don't see them often.




**Download or send a snapshot**

This provider may be new to you, and you plan to see them again. They may be a specialist outside of your regular healthcare organization or a school nurse.



**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 us permission to share your health record**

Sharing with outside organizations ahead of time ensures health professionals can get your record if you're traveling, seeing specialists at other organizations, or if you have an emergency.

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

## 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

You can download or send a summary and/or specific visit details. You will get this as a human-readable file plus computer-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.

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