

Resolving Login Problems

1. Verify identity of the patient. (Confirm an address, SSN, DOB, or all three.)

From the patient's Patient Portal Account Management window (Info > Options > Web-enable

2. Confirm the patient's username by having the patient read the name he/she is using.
3. If they are getting a message stating that their account has been locked, check the "Unlock Account" box.

The screenshot shows a web-based interface for managing a patient's account. The main window is titled "Patient Information (TEST, LAB T)". It contains several sections: "Personal Info" with fields for Account No (127523), Last Name (TEST), First Name (LAB), Address Line 1 (123 MyA), Address Line 2 (456 MyA), City (Bryan), State (TX), Home Phone (000-000), and Work Phone (-). It also lists "Responsible Party" (TEST, LAB T) and "Insurances" (MEDICAID MEDICAL, BVCAA). A "Patient Portal Account Management" dialog box is open, showing "Status: Web Enabled" and "Change portal access credentials" with fields for User Name (LABTEST2001), Password, Confirm Password, and Email (dfowler@bvcaa.org). Below this, there is an "Unlock the patient account" section with a checked "Unlock Account" checkbox and a note: "Check this in order to unlock patients who have been locked out of the portal incorrect password more than 3 times. [Old username and passwords are retained]." There is also a "Disable patient's portal account" section with an unchecked checkbox. Buttons for "Reset Password", "Print", "OK", and "Cancel" are visible at the bottom of the dialog.

4. Ask if they have tried the "forgot password?" feature on the patient portal login screen. If not, ask them to try this feature while on the phone with you if possible.

The screenshot shows the HealthPOINT patient portal login screen. The URL is "medicalweb.com/porta2497/jsp/100mp/login.jsp". The page has a header with "Sign Pre-Register" and "Forgot Password?" links. Below the header is a login form with a username field, a password field with a lock icon, and a "Login" button. The main content area features the HealthPOINT logo, a "Welcome to HealthPOINT" message, and a "Pre-Register" button. A "Full of Travel" badge is visible in the bottom left corner.

If further help is needed, see the following eCW suggestions, from Seven Steps to Patient Sign-on Success with the Patient Portal :

2. Assign a temporary user-friendly password.
3. Change the User Name for the patient.
4. Change the E-mail address of the patient.
5. Assign a new owner to the account

eClinicalWorks

SEVEN STEPS TO PATIENT SIGN-ON SUCCESS WITH THE PATIENT PORTAL

2 - Assign a Temporary User Friendly Password

After patients have used this temporary password the first time they sign in, they will be prompted to choose their own password.

To assign a user friendly password:

1. On the Patient Portal Account Management window, type a password into both password fields.
2. Read the password you just typed aloud to the patient.

Note: At no time will the passwords display.

3. Click OK:



The screenshot shows a window titled "Patient Portal Account Management". It has a status bar at the top that says "Status: Web Enabled". Below that is a section titled "Change portal access credentials" which contains four input fields: "User Name" (ConnorPortal1980), "Password" (masked with asterisks), "Confirm Password" (masked with asterisks), and "Email" (connor@gmail.com). Below this is a section titled "Unlock the patient account" with a checkbox "Unlock Account" and a paragraph of text explaining that this option is for patients who have locked themselves out. At the bottom is a section titled "Disable patient's portal account" with a checkbox "Disable patient's portal account". At the very bottom are four buttons: "Reset Password", "Print", "OK", and "Cancel". The "OK" button is highlighted with a red box.

4. Remind the patient that the changes will take effect in about five minutes.

Patients will then be asked to choose their own password after they sign in with this temporary user friendly password.

3 - Change the User Name for a Patient

To change a patient's user name:

1. On the Patient Portal Account Management window, type the new name into the User Name field.
2. Click OK:



The screenshot shows a window titled "Patient Portal Account Management" with a status of "Web Enabled". It has three main sections: "Change portal access credentials" with fields for "User Name" (containing "ConnorKid"), "Password", "Confirm Password", and "Email" (containing "connor@gmail.com"); "Unlock the patient account" with an unchecked checkbox "Unlock Account" and explanatory text; and "Disable patient's portal account" with an unchecked checkbox "Disable patient's portal account". At the bottom are buttons for "Reset Password", "Print", "OK", and "Cancel". The "User Name" field and the "OK" button are highlighted with red boxes.

Remind the patient that the changes will take effect in about five minutes.

4 - Change the E-mail Address of a Patient

To change a patient's e-mail address:

1. On the Patient Portal Account Management window, type the new e-mail address into the e-mail field.
2. Ask the patient if he/she would like to update their user name to their e-mail address at the same time.

If so, go to Step 3 for instructions in changing the user name.

3. Click OK:

Seven Steps to Patient Sign-On Success with the Patient Portal

4 - Change the E-mail Address of a Patient



The screenshot shows the same "Patient Portal Account Management" window. In this view, the "Email" field in the "Change portal access credentials" section is highlighted with a red box and contains the text "connor@gmail.com". The "OK" button at the bottom is also highlighted with a red box.

Remind the patient that the changes will take effect in about five minutes.

Note: Patients can also be initially web enabled from the Appointment menu, though not all clients will see this until an update is available. In these cases, the e-mail address becomes the patient's user name. However, updates to the e-mail address here do not update the Portal user name. Therefore, we recommend following the steps to update the Portal user name from the Web Enable menu when the e-mail address changes in these cases:

The screenshot shows a software window titled "Appointment on Wednesday, January 18, 2012". It contains various fields for appointment details. The "E-mail" field, located next to the patient's name "Portal, Connie", contains the text "wellnessdepot@gmail.com" and is highlighted with a red rectangular box. Other visible fields include Facility (101), Date (1/18/2012), Provider (Wills MD, Sam O), and Start/End Time (2:00 PM).

5 - Assign a New Owner to the Account

Account owners may need to be changed, for example, when a patient turns 18.

To assign a new owner to an account:

1. Type the new user name.
2. Type and confirm the password
3. Type the new e-mail address into the e-mail field.
4. Click OK:

The screenshot shows a dialog box titled "Patient Portal Account Management". The "Status" is "Web Enabled". The "Change portal access credentials" section is highlighted with a red rectangular box. It contains four input fields: "User Name" (myhealthconnor), "Password" (masked with asterisks), "Confirm Password" (masked with asterisks), and "Email" (your.email@gmail.com). Below this section are two unchecked checkboxes: "Unlock the patient account" and "Disable patient's portal account". At the bottom, there are buttons for "Reset Password", "Print", "OK", and "Cancel". The "OK" button is highlighted with a red rectangular box.