



# **Greenway Patient User Help Guide**

Greenway Patient Portal  
Greenway Patient Messaging  
version 3.21

# Using the MyHealthRecord.com Patient-Facing Portal

## 22 | Using the Portal

This section gives practices using Greenway Patient Portal an overview of the MyHealthRecord.com patient-facing portal.

### How to Get Here

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To see these sections in action, you will need to log into MyHealthRecord.com as a Patient.

### Sections

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The MyHealthRecord.com patient-facing portal is divided into the following sections:

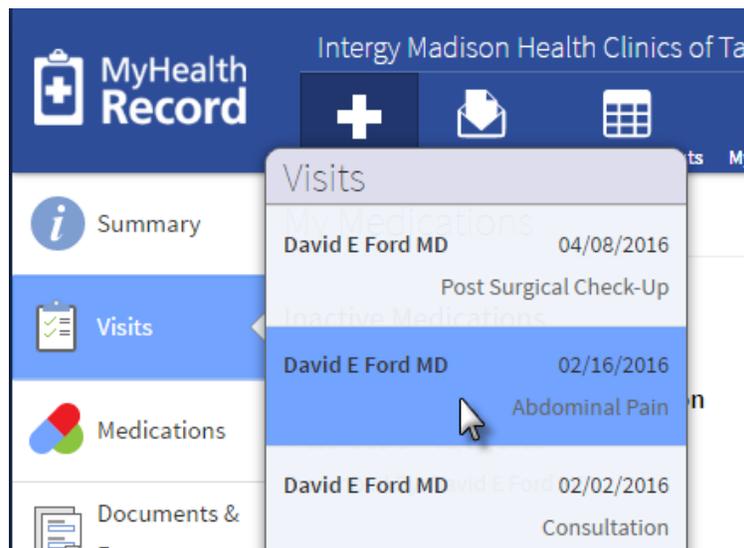
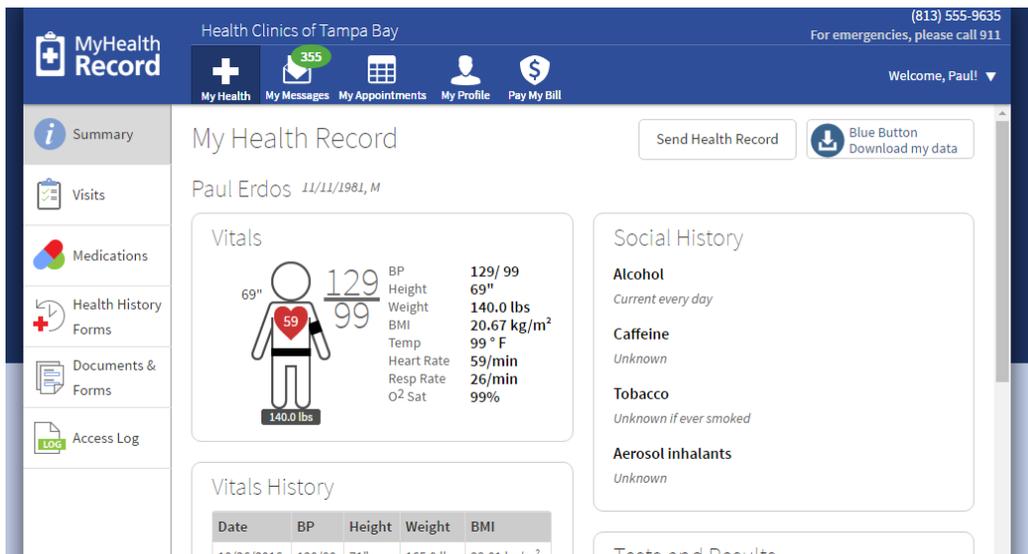
- **[My Health](#)**: This is the main section of the site, and includes all patient medical information, including medication requests and health record (CCD) downloads.
- **[My Messages](#)**: Where patients can send and receive secure communications to and from the practice.
- **[My Appointments](#)**: Where patients can see a list of upcoming appointments, and request appointments.
- **[My Profile](#)**: Information about the patient, including demographics and insurance.
- **[Pay My Bill](#)**: Allows patients to securely send their payments via the portal or third party payment options.

Greenway Patient Portal users with Admin rights can shape the look and feel for much of the patient portal by using the [Portal Configuration](#) widget.

## 23 | My Health

The My Health section is where patients can:

- Get an overview of the most up-to-date medical information in the **Summary** view, see a specific visit's information using the **Visits** view.



- Use **Send Health Record** to email their CCD to themselves or another care provider (via Direct Address) directly from the portal, or download their **Blue Button** data as PDF or XML. This can be done for a specific visit (from the **Visits** page) or for all visits (from the **Summary** page).

Send Health Record

Blue Button  
Download my data

To (required)  
Example: johndoe@email.com

Check only if this is a Direct Address.  
Tip: A Direct address is a special email address with enhanced security that often has the word "direct" in it.  
Example: doctor@direct.practice.com

My Health Record  
Message

You are about to send personal health data outside our secure portal. Please ensure that you know the recipient.

Send Cancel

Blue Button Disclaimer

I understand that by downloading and saving a copy of my medical summary to my computer, I am now responsible for securing the information and protecting it from access by unauthorized entities.

PDF  
 XML

I Accept I Decline

- **Prime Suite Practices only:** Access and complete **Health History Forms**. (This does not show up for practices using Greenway Intergy.)

MyHealth Record

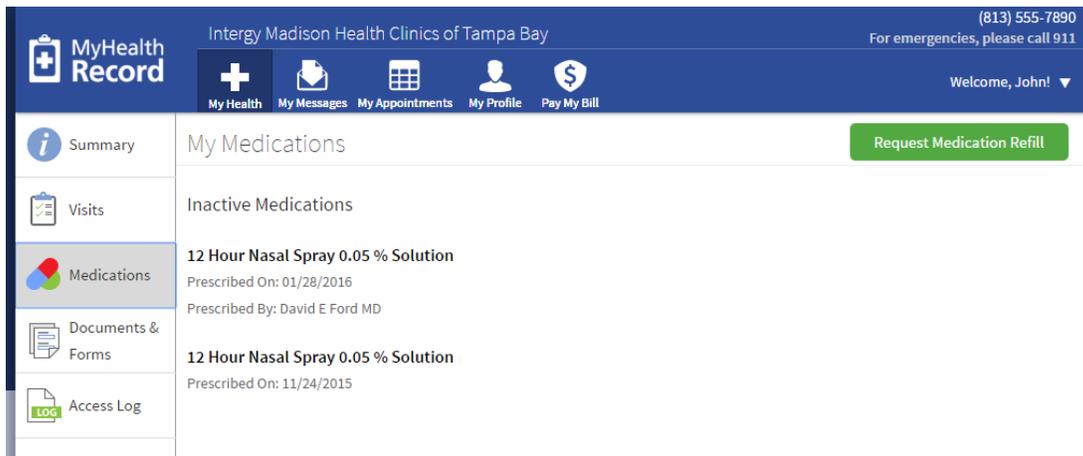
Health Clinics of Tampa Bay

Summary  
Visits  
Medications  
Health History Forms  
Documents &

Health History Forms

- Allergies Start New
- Family Medical History 10/20 Start New
- Medications Start New
- Past Medical History Start New
- Social History Start New
- Surgical History Form Start New

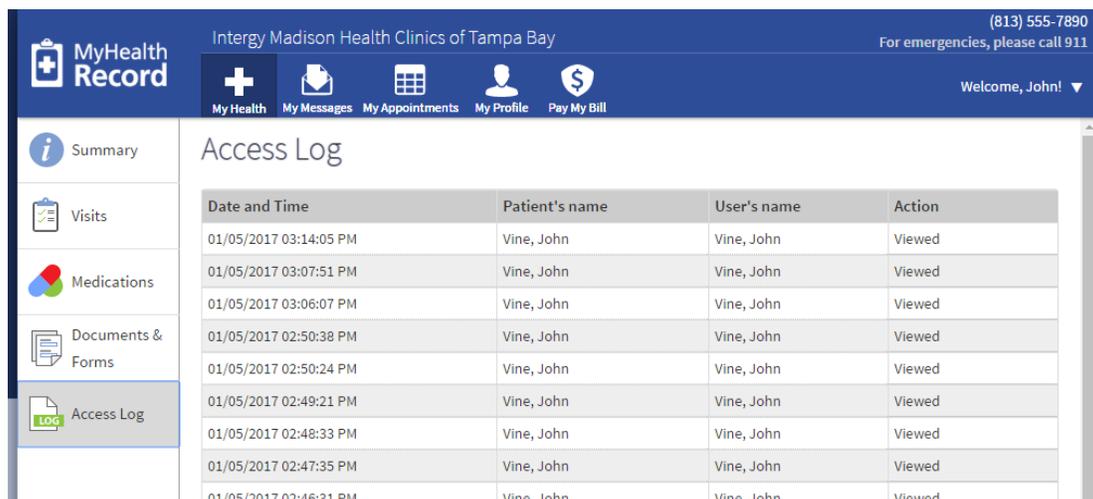
- See a list of all current **Medications** and, if the practice allows it, [request refills online](#).



- Download patient education, financial, administrative, and medical **Documents and Forms**.

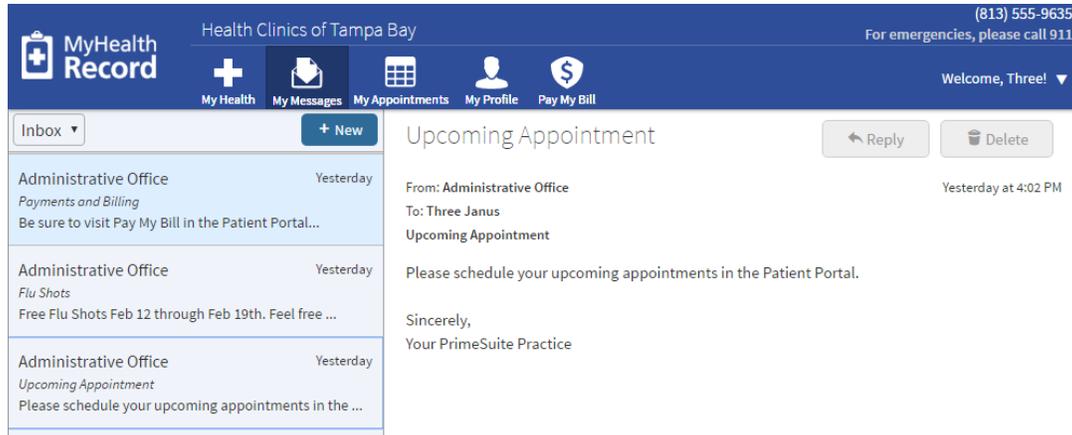


- Track when health data is viewed, downloaded, or sent to another care provider via the **Access Log**.



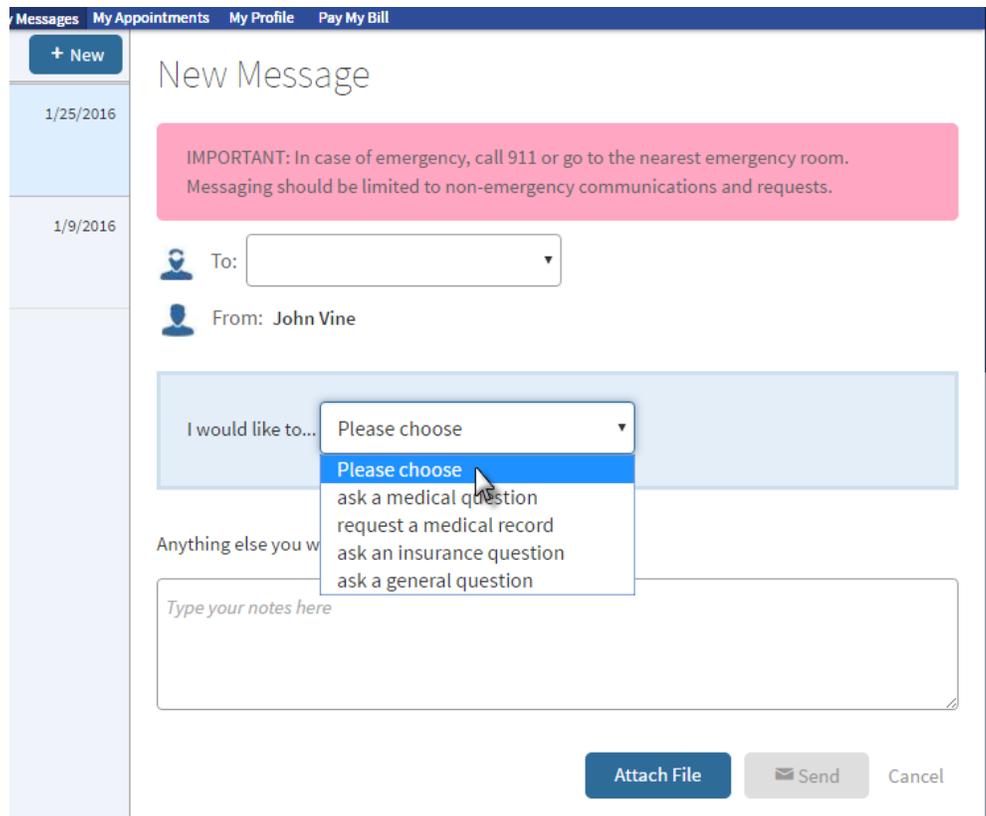
## 24 | My Messages

Using the My Messages function, patients can send and receive secured communication to and from the practice. Messages are divided between the *Inbox* and *Sent*.



When sending a **New** message, users can:

- Select the care provider to communicate with. (Includes only providers marked in the [Providers](#) page.)
- Ask questions and request records. The message fields are required to fill out will change according to what users want to do.

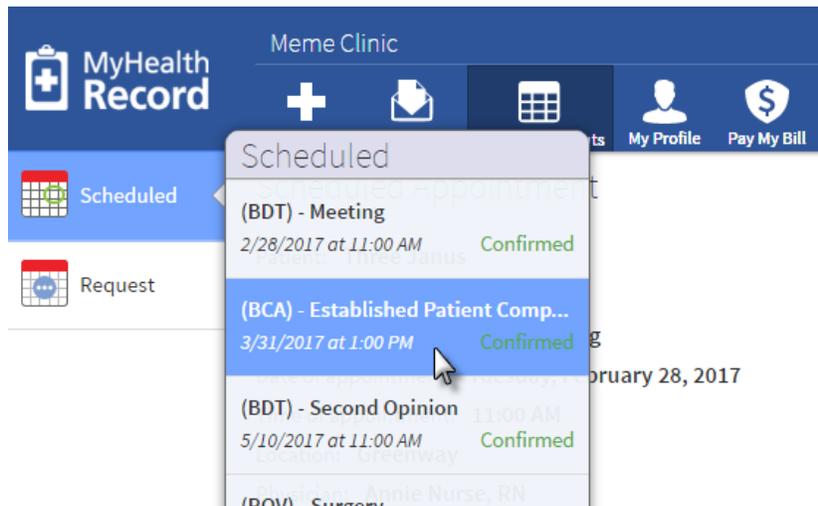


Users can also **Reply** to and **Delete** messages. Deleted messages will be removed from the user's message list, but will not be removed from the practice's internal records.

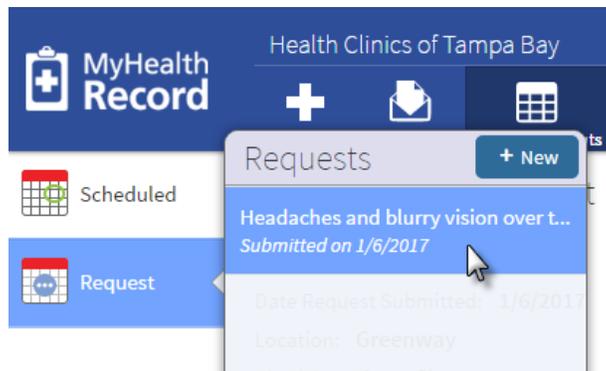
## 25 | My Appointments

In the My Appointments page, users can:

- Review their upcoming, **Scheduled** appointments. Clicking on an appointment from the Scheduled list will show its details on the page.



- See a list of appointment **Requests** which have not yet been scheduled. (This is not visible if appointment requests are turned off in the [Appointment Preferences](#) page.)



- Request a new appointment, if allowed in the [Appointment Preferences](#) page.

MyHealth Record Health Clinics of Tampa Bay (813) 555-9635 For emergencies, please call 911

Welcome, Three!

Scheduled Request

### Request Appointment

**Patient** Three Janus

**Location**

**Physician (required)**

**How soon?**

**Preferred Day(s)**  
 Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

**Time**  
 No preference  Morning  Afternoon

**What is most important to you?**

**Reason for visit (required)**  
 Please give us a little more information about your visit.

IMPORTANT: Appointment requests should be limited to non-emergency communications. In case of emergency, call 911 or go to the nearest emergency room.

**Note** - Patients can only choose the options allowed in the [Appointment Preferences](#) page.

**Note** - Physician and Location are only visible if there are some selected in the [Providers](#) and [Appointment Locations](#) pages, respectively.

## 26 | My Profile

The My Profile section is divided into the following:

- **My Information:** Shows personal and contact information for the user. Default view.

Family Medical Clinic (877) 931-6301  
For emergencies, please call 911

Welcome, Ricki

**My Information** Edit

Please update any incorrect or outdated information

Personal Information	Additional Information
First Name: Rick	Gender: Male
Middle Name:	Race: Other Race
Last Name: Garcia	Ethnicity: Hispanic or Latino
Preferred Name:	Marital Status: Married
Date of Birth: 02/13/1934	Primary Language: English
SSN: *-*-* *-*	
Driver's License:	
Contact Information	Address
	Address Line 1: 121 Main Street
	Address Line 2:

- **My Insurance:** Shows insurance information for the user.

Family Medical Clinic For emergencies, please call 911

Welcome, Ricki

**My Insurance** Edit

Current Insurance Plan(s)

Please update any incorrect or outdated information about your current insurance plan.

Primary
Policy Holder: Garcia, Rick
Insurance Company: Medicare
Insurance Plan: Medicare Part B
Policy Number: 410410410
Group Number: 4104107
Start Date: 2/10/2014

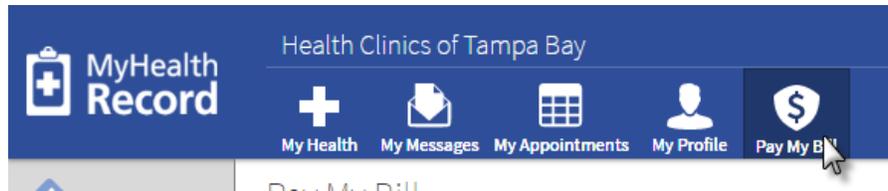
You can choose whether or not to allow patients to edit this information using the [Patient Profile](#) page. Patients can make changes by selecting **Edit** (or **Add** if no insurance plan information was entered).

**Note** - Changes will not show up on the portal until approved and reconciled by the practice. Changes are approved and reconciled using your EHR. For details on doing this, see your EHR's documentation.

Patients can see a summary of changes submitted in the [My Messages Sent](#) list.

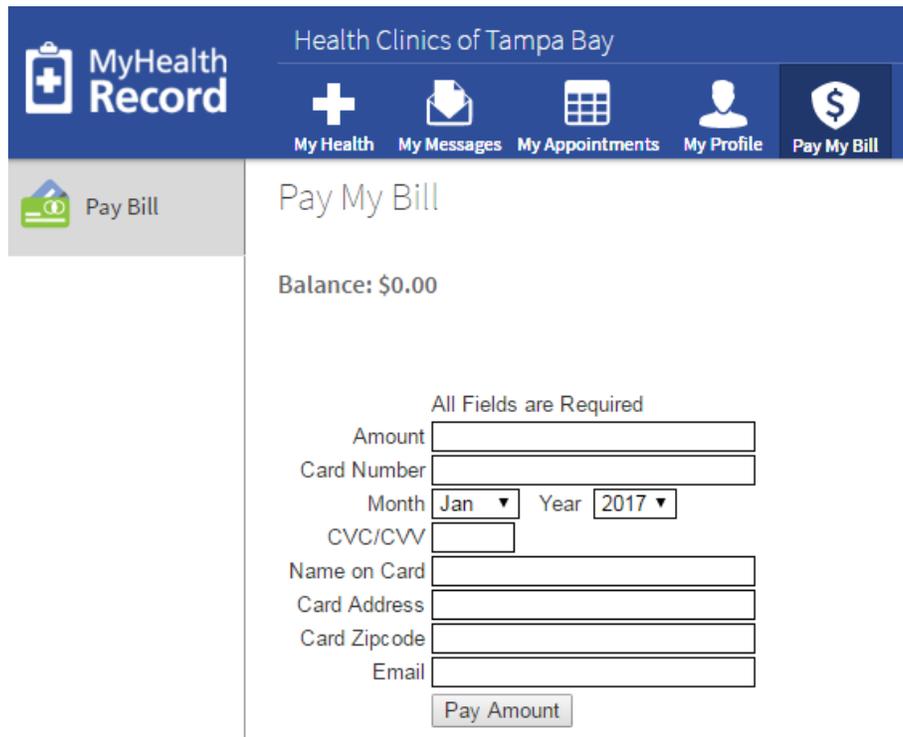
## 27 | Pay My Bill

The **Pay My Bill** option only shows up for patients if set up in the [Enable Connections](#) page.



### If Your Practice Uses TSYS

Selecting **Pay My Bill** opens the payment page within MyHealthRecord.com. Users can enter payment information there. When a payment is made, you will receive a message about this in your EHR's tasks list.



Health Clinics of Tampa Bay

MyHealthRecord

My Health My Messages My Appointments My Profile Pay My Bill

Pay Bill

Pay My Bill

Balance: \$0.00

All Fields are Required

Amount

Card Number

Month  Year

CVC/CVV

Name on Card

Card Address

Card Zipcode

Email

Pay Amount

**Note** - All communications will be secured and handled by TSYS.

After a successful payment, you will also receive an email from MyHealthRecord.com.

### If Your Practice Uses a Third Party for Payments

Selecting **Pay My Bill** opens a new window or tab to the address entered in the **URL** box in the [Enable Connections](#) page.

## TSYS Payment Workflow

Through our partnership with TSYS, Greenway is able to provide an integrated payment environment for patients. This topic describes that process and what you should expect.

### Step 1: User Payment

A MyHealthRecord.com user will go to the [Pay My Bill](#) page. After reviewing their account balance, they can fill out their credit card payment information in the TSYS fields.

- **Prime Suite Practices** will only see one account balance, since the system requires that there be a single balance per patient.

The screenshot shows the 'Pay My Bill' page for Prime Suite Health Clinics of Tampa Bay. The header includes the MyHealthRecord logo, navigation icons for My Health, My Messages (354), My Appointments, My Profile, and Pay My Bill, and contact information: (813) 555-9645 and 'For emergencies, please call 911'. The user is identified as 'Paul!'. The main content area displays 'Pay My Bill' with a balance of \$126.00. Below the balance is a form titled 'All Fields are Required' with the following fields: Amount, Card Number, Month (dropdown menu set to Jan), Year (dropdown menu set to 2017), CVC/CVV, Name on Card, Card Address, Card Zipcode, and Email. A 'Pay Amount' button is located at the bottom of the form.

- **Intergy Practices** will see a balance for every account they're a part of within the practice, since the system allows for multiple people on the same account.

The screenshot shows the 'Pay My Bill' page for Intergy Madison Health Clinics of Tampa Bay. The header includes the MyHealthRecord logo, navigation icons for My Health, My Messages, My Appointments, My Profile, and Pay My Bill, and contact information: (813) 555-7890 and 'For emergencies, please call 911'. The user is identified as 'John!'. The main content area displays 'Pay My Bill' with an account for 'Account #365 (John James Vine)' and a balance of \$0.00. Below the balance is a form titled 'All Fields are Required' with the following fields: Amount, Card Number, Month (dropdown menu set to Jan), Year (dropdown menu set to 2017), CVC/CVV, Name on Card, Card Address, Card Zipcode, and Email. A 'Pay Amount' button is located at the bottom of the form.

This assumes that TSYS was correctly configured using the [Enable Connections](#) page.

## Step 2: Success Message and Receipt

After a successful payment, the user will see a success message, including a copy of the submitted information.

### Pay Bill

*IMPORTANT: We recommend you use Microsoft Internet Explorer or Google Chrome from your computer for paying your bill. If you're using another browser, a phone, or a tablet, you may not be able to complete your payment. Support for other browsers and platforms is coming soon.*

#### Success!

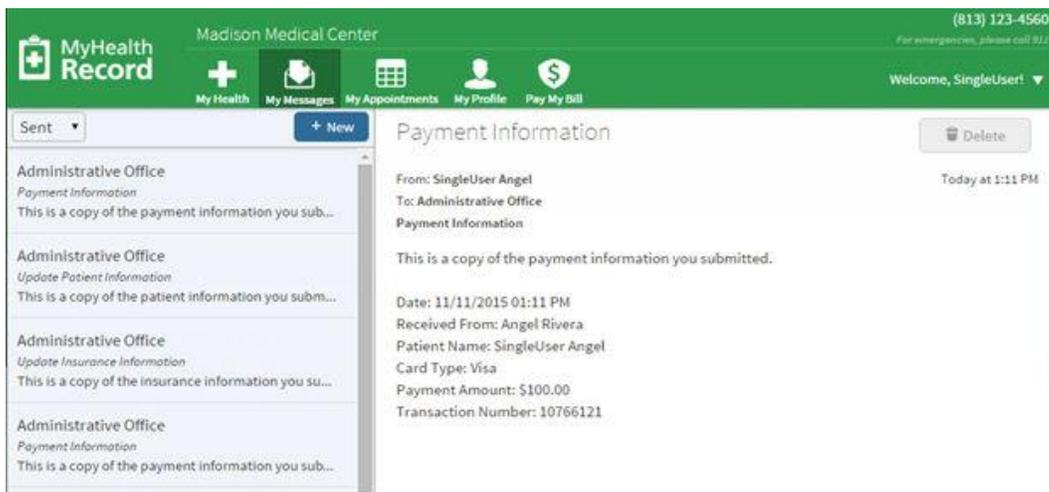
Your payment went through. A copy of this information was added to your sent messages folder.

This is a copy of the payment information you submitted to Madison Medical Center.

Date: 11/11/2015 04:14 PM  
Received From: Angel Rivera  
Patient Name: SingleUser Angel  
Card Type: Visa  
Payment Amount: \$100.00  
Transaction Number: 10767561

Thank you for your payment.

This information will also show up as a 'Sent' message in the user's [My Messages](#) page.



Greenway Patient Portal will also send a receipt to the patient via email.

## Greenway Patient

Dear SingleUser,

This is a copy of the payment information you submitted.

Date: 11/11/2015 04:14 PM  
Received From: Angel Rivera  
Patient Name: SingleUser Angel  
Card Type: Visa  
Payment Amount: \$100.00  
Transaction Number: 10767561

Thank you for your payment.

Thank You,

Madison Medical Center

Note: Please do not reply to this email. If you have any questions or concerns, please contact our office. You received this email because you are registered on <https://sso.viterahealthcare.com> with the email address: [angel.rivera@greenwayhealth.com](mailto:angel.rivera@greenwayhealth.com). If you believe you received this message in error, please contact us immediately.

**Note** - When you were first set up with TSYS, the receipt functionality at TSYS's end should have been turned off. If a patient mentions that they received two receipts for the same visit, contact TSYS Merchant Support at 800-654-9256 and ask to have the receipt functionality turned off.

### Step 3: Tasks

After a successful payment, the practice will receive a Task in the EHR containing with the payment information.

**Note** - See your EHR's help documentation for information on the Tasking functionality.



# MyHealthRecord.com and Greenway Patient Portal Frequently Asked Questions

## 28 | Greenway Patient Portal FAQ for Practice Users

- **How do I invite new users to the portal?**  
Users can only be invited directly from your EHR. See your EHR's help documentation for details.
- **How do I edit a user's information?**  
User information is edited using your EHR. Users can submit a change request through the portal, but all changes must be approved using your EHR. See your EHR's help documentation for details.
- **How do I link patients together? For example, a parent (who isn't a patient) and a child (who is a patient)?**  
Patient linking and unlinking can only be done using your EHR. See your EHR's help documentation for details.
- **How do I prevent a user or patient from accessing the portal? How do I remove a user's portal access?**  
Removing a user's or patient's portal access can only be done using your EHR. See your EHR's help documentation for details.
- **How do I change my password?**  
Select your initials in Greenway Patient Admin Dashboard then **My Account** from the menu. In the page that opens, select **Password**. Remember, too, that any user with Admin rights can change another practice user's password using the [Practice Users](#) details view.
- **As a practice user, what if I forget my user name or password for MyHealthRecord.com?**  
Please contact Greenway support for a password reset.
- **Why can't my patients choose locations when requesting an appointment?**
  - Verify that the [Appointment Locations](#) page is set up correctly, with more than one location selected.
  - Verify that 'Show Location Options' in [Appointment Preferences](#) is checked.If you have done this and locations still aren't showing up, please contact technical support.
- **Why can't my patients choose a care provider when requesting an appointment, or when sending a secure message?**
  - Verify that the [Providers](#) page is set up correctly, with more than one location selected.
  - Verify that 'Show Provider Options' in [Appointment Preferences](#) is checked.If you have done this and care providers still aren't showing up, please contact technical support.
- **What if I can't see the location or physician selection sections of the [Providers](#) or [Appointment Locations](#)?**  
If you don't see the Location Selection or Physician Selection sections, it may mean that the portal hasn't yet been completely connected to your EHR.
- **How do I contact TSYS?**  
You can contact TSYS Merchant Support at 800-654-9256.

## 29 | MyHealthRecord.com Patient-Facing Portal FAQ

The following is a list of common questions about the MyHealthRecord.com patient-facing portal.

### General

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- **How do I request an appointment?**  
Under **My Appointments**, select **Request**, and select **New** to request a new appointment.
- **How do I cancel, or reschedule an appointment?**  
Please contact the practice.
- **How do I fill out health history forms requested by the office?**  
Under **My Health**, select **Health History Forms** and select a form to fill out. (You can only see the online **Health History Forms** if your doctor's office offers them.) Do this for every form you're asked to complete. Remember, if you don't have time to finish a form, click **Finish Later** in the form. This saves your answers for later. Forms that haven't been finished are marked as being 'In Progress' in the Health History Forms list.
- **How do I request a medication prescription refill?**  
Under **My Health**, select **Medications**. There, you can select the **Refill Medications** button. Note that the **Refill Medications** button will only show up if your practice takes online refill requests at this time. If this button is not there, you will need to call the office directly.
- **How do I ask a question of my physician or the office?**  
Under **My Messages**, select **New**, and from the **I would like to...** list, choose the appropriate question.
- **Where do I see my lab results?**  
Lab results will display under **My Health**, in the **Summary** page, under the **Tests and Results** section. If you do not see your lab results, contact your care provider.
- **Two or more of my care providers use MyHealthRecord.com. Do I have to make a different login for each?**  
No. You can access both sets of records using one login to MyHealthRecord.com, and switch between them using the **Welcome** or **Viewing** menu in the Navigation bar ("*Welcome, Jason*" or "*Viewing Jessica's Profile*").
- **Why can't I see attachments on my messages?**  
Make sure that cookies are enabled on your browser.
- **How do I pay my bill?**  
If your provider accepts online payments, you will see a **Pay My Bill** option in the Navigation bar.

### Medical and Health Records

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- **How do I request my medical records?**  
Under **My Messages**, select **New** and from the **I would like to...** list, choose '*request a medical record*'.
- **How can I see my medical summary? How do I send this to another medical practice?**

- You will see your medical **Summary** as soon as you log in to MyHealthRecord.com.
- To send your medical information, use the **Send Health Record** button. Be sure to read the on-page instructions carefully. If you don't know the email address, you will need to ask the physician you are trying to send your records to.
- To download your medical record, use the **Blue Button**. You can save information to an SD card or a thumb drive, and give it to the other practice by hand. You can download data as a PDF and as an XML file.
- **How can I see the records for a specific visit? How do I send this to another medical practice?**
  - After logging into MyHealthRecord.com, select **Visit** from the menu and pick a visit from the list.
  - To send this visit's information, use the **Send Health Record** button. Be sure to read the on-page instructions carefully. If you don't know the email address, you will need to ask the physician you are trying to send your records to.
  - To download this visit's information, use the **Blue Button**. You can save information to an SD card, or a thumb drive, and give it to the other practice by hand. You can download data as a PDF and as an XML file.
- **How do I download my health record?**  
Under **My Health**, in the **Summary** page, select the **Blue Button** to download your health record as shown. You can choose to download it as a PDF or XML file. Choose PDF to make it easy to print. Choose XML to make it easy for the physician's office to import your record into their system.
- **How do I see my child's health record?**  
Click on your name on the main menu. If you have access to your child's health record you will see their name in the list. If not, please contact the office.
- **I am a caregiver. How do I see my loved one's health record?**  
Click on your name on the main menu. If you have access to your loved one's health record you will see their name in the list. If not, please contact the office.

## Updating My Information

- **How do I see and update my contact information?**  
Under **My Profile**, select **My Information** to see your contact information as recorded by the office. If the practice allows you to submit changes via the portal, select **Edit** to do so.
- **Why can't I see or change my social security number?**  
Your practice may not allow this. If you believe this is a mistake, please contact the practice.
- **How do I see and update my insurance information?**  
Under **My Profile**, click **My Insurance** to see your insurance information as recorded by the office. If the practice allows you to submit changes via the portal, select **Edit** to do so.
- **How do I change my password?**  
Select the **Welcome** or **Viewing** menu in the Navigation bar ("*Welcome, Jason*" or "*Viewing*")

*Jessica's Profile*") and select **My Account Settings**. In the page that opens, select the Edit link next to Password.

- **What if I forget my user name or password?**

On the MyHealthRecord.com login page, click **Forgot Username** or **Forgot Password** and follow the steps in the screens that follow.