



# PrimePATIENT Patient User Guide

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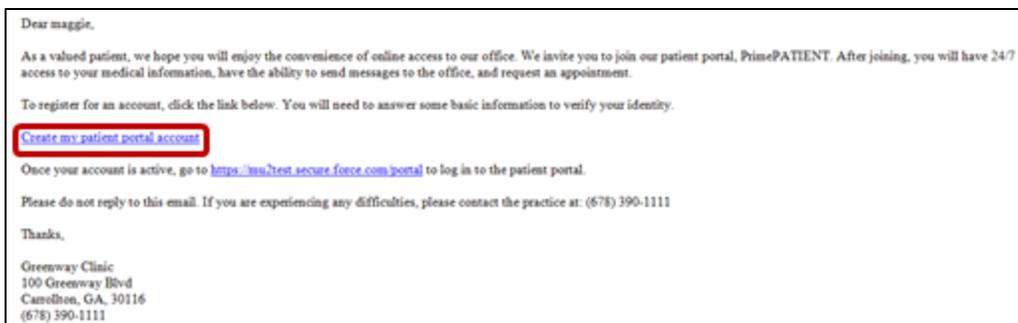
The PrimePATIENT® user guide provides information on how to use Greenway Medical’s consumer platform PrimePATIENT. The PrimePATIENT patient portal is a convenient and secure health-management tool you can use anywhere you have internet access. Through PrimePATIENT, you can: send secure messages to your provider, request an appointment, check on your lab results, pay your bill, view your health record, request a prescription refill, complete registration and health information forms, and read patient education.

## Getting Started

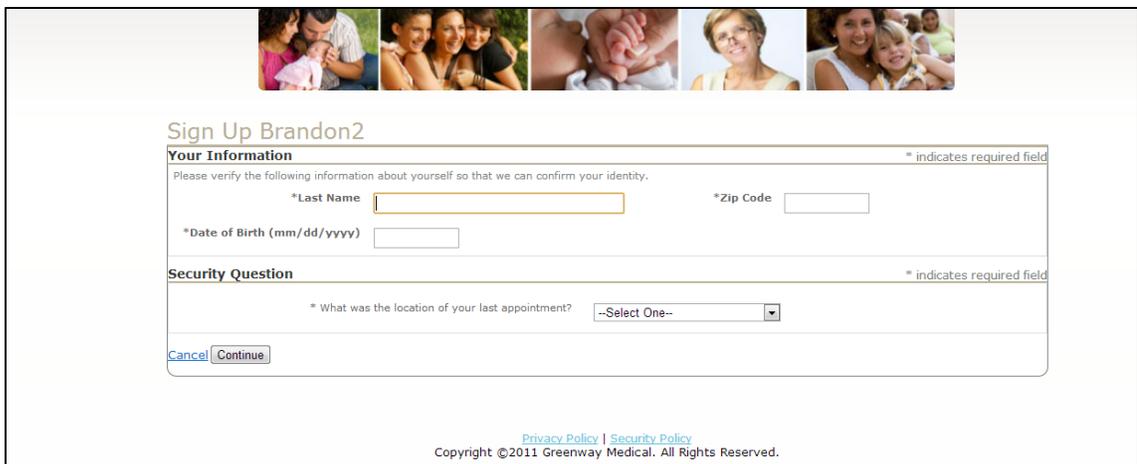
First, you should contact your medical provider’s office to request access to PrimePATIENT. As soon as your provider’s office has processed your request, you will receive an e-mail invitation to create your account.

### Accept PrimePATIENT Invitation

1. When you receive your e-mail invitation, click on the **Create My Patient Portal Account** in the e-mail.

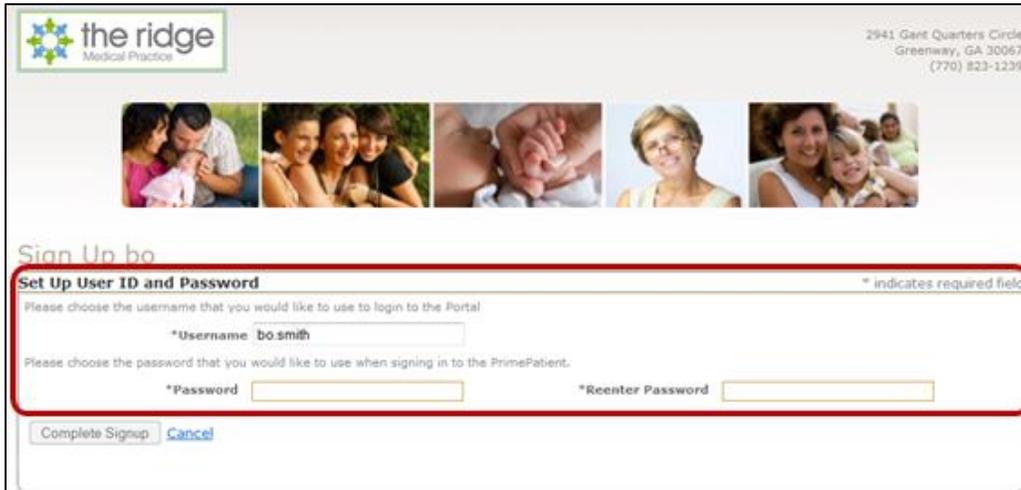


2. The Patient Portal Signup page will open in your browser.
3. Answer all the security questions to verify your identity and click **Continue**. (The questions below may be different than the questions you are asked to confirm.)



If you are a responsible party signing up for an account for a patient you are responsible for, the information requested and the security questions will be about you, not the patient.

4. Review and agree to the terms of service and click **Continue**.
5. Verify your **username** and create your **password**. Click on **Complete Signup**.



The screenshot shows the 'Set Up User ID and Password' form for 'the ridge Medical Practice'. The form is titled 'Set Up User ID and Password' and includes a red border around the input fields. It contains the following elements:

- Logo for 'the ridge Medical Practice' and contact information: 2941 Gent Quarters Circle, Greenway, GA 30067, (770) 823-1239.
- A row of five small images showing people in various settings.
- A 'Sign Up' button.
- A section titled 'Set Up User ID and Password' with a red border around the input fields.
- Instructions: 'Please choose the username that you would like to use to login to the Portal.'
- A text input field for the username, containing 'bo.smith'.
- Instructions: 'Please choose the password that you would like to use when signing in to the PrimePatient.'
- Two text input fields for the password, labeled '\*Password' and '\*Reenter Password'.
- A 'Complete Signup' button and a 'Cancel' link.
- A note: '\* indicates required field'.

6. You will now have access to your Patient Portal account.

## Login to PrimePATIENT

After you have completed the initial setup process, you can then log in to the patient portal using your username and password. Some practices will provide a link to the portal on their website. Clicking this link will take you to the Patient Portal Login page.

To access the practice's patient portal:

1. Go to the **Login** page and enter your **Username** and **Password**.

**the ridge**  
Medical Practice

The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
7708231239

Login

Username

Password

Login

[Forgot Your Password?](#)

[Forgot Username?](#)

[Terms of Service](#)

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**GREENWAY**

2. Click the **Login** button.
3. The Home Page will appear.

**the ridge**  
Medical Practice

The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
7708231239

Hello, Elisha Bell  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages Appointments Patient Profiles Health Information Prescriptions Billing Education

Home

**To Dos & Reminders**  
You currently have no reminders.

**Messages** [See All Messages](#)

**News and Announcements** [See All Clinic News](#)

[Follow us on Twitter](#) [Visit us on Facebook](#)

**Patient Education** [See All Health News](#)

Home | Messages | Appointments | Patient Profiles | Health Information | Prescriptions | Billing | Education |

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**GREENWAY**

Your session will remain active for 15 minutes after the last activity. If you leave the portal open but it is inactive for 15 minutes or more, your account will automatically be logged at and you will be taken to the login screen.

## If You Forget Your Password

You can reset your password from the login page at any time by clicking the **Forgot Your Password** link located below the Login button. You will then receive an email with a temporary password.

To reset your password:

1. Go to the **Login** page.
2. Click the **Forgot Your Password** link.



The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
7708231239

the ridge  
Medical Practice

Login

Username

Password

Login

**Forgot Your Password?**

[Forgot Username?](#)

[Terms of Service](#)  
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**GREENWAY**

3. Enter your **Username** and click the **Submit Name** button.



The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
7708231239

the ridge  
Medical Practice

Forgot Password

Username

Submit Name

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**GREENWAY**

4. Select the correct option for the security question and then click **Answer**.

5. Check the email you have associated with your account to obtain your temporary password.
6. Return to the **Login** page.
7. Enter your Username.
8. Enter your temporary password. (Be sure to enter your temporary password exactly as it appears.)
9. Change your password by entering a new password in the **New Password** field and in the **Verify New Password** field. (Both passwords must match or you will receive an error message.)
10. Click the Change Password button.
11. You will now have access to your Patient Portal account.

### If You Forget Your Username

You can request to have your username sent to you via email at any time by clicking the **Forgot Username** link located below the Login button.

To reset your password:

1. Go to the **Login** page and click the **Forgot Username** link.

The Ridge Practice  
2941 Saint Quarters Circle  
Greenway, GA 30545  
7708331238

the ridge  
Medical Practice

Login

Username

Password

Login

[Forgot Your Password?](#)

[Forgot Username?](#)

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GREENWAY

2. Enter the email address you have associated with your account and answer any security questions asked.



The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
(770) 823-1239

**Forgot Username**

If you would like to have your Username sent to your email address, please fill out the form below.

Email  **Find Username**

First Name

Last Name

Birthdate

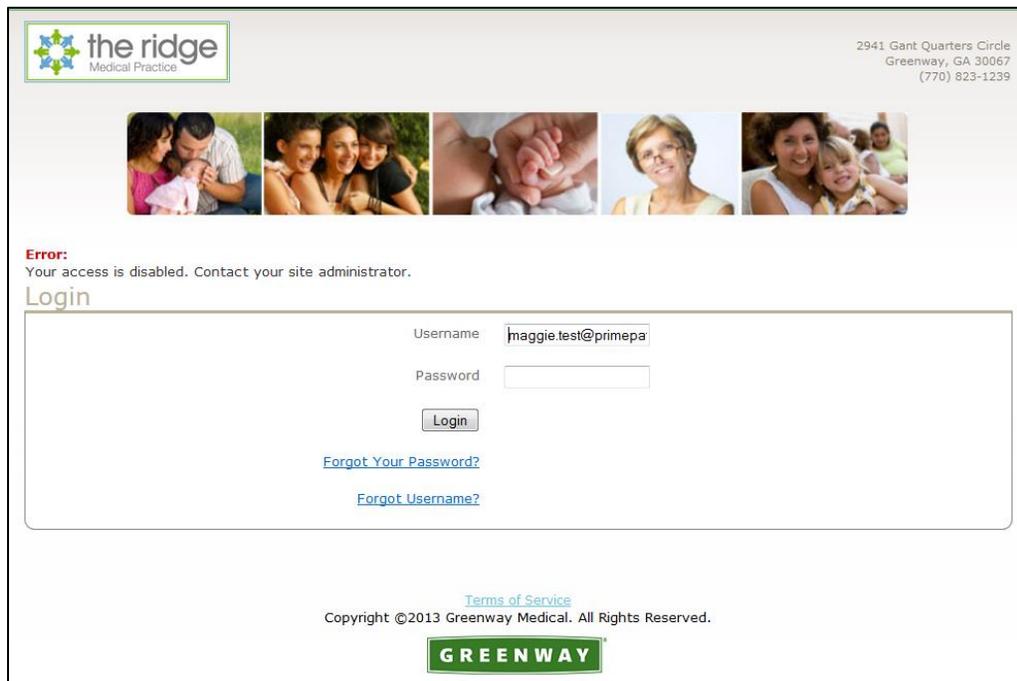
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**GREENWAY**

3. Click the **Find Username** button.
4. You will receive an email with your username.

## Access Disabled

The doctor's office can choose to temporarily disable your portal login for different reasons. If you receive the below notification when you try to login to your portal account, please contact your doctor's office.



The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
(770) 823-1239

**Error:**  
Your access is disabled. Contact your site administrator.

**Login**

Username

Password

**Login**

[Forgot Your Password?](#)

[Forgot Username?](#)

[Terms of Service](#)  
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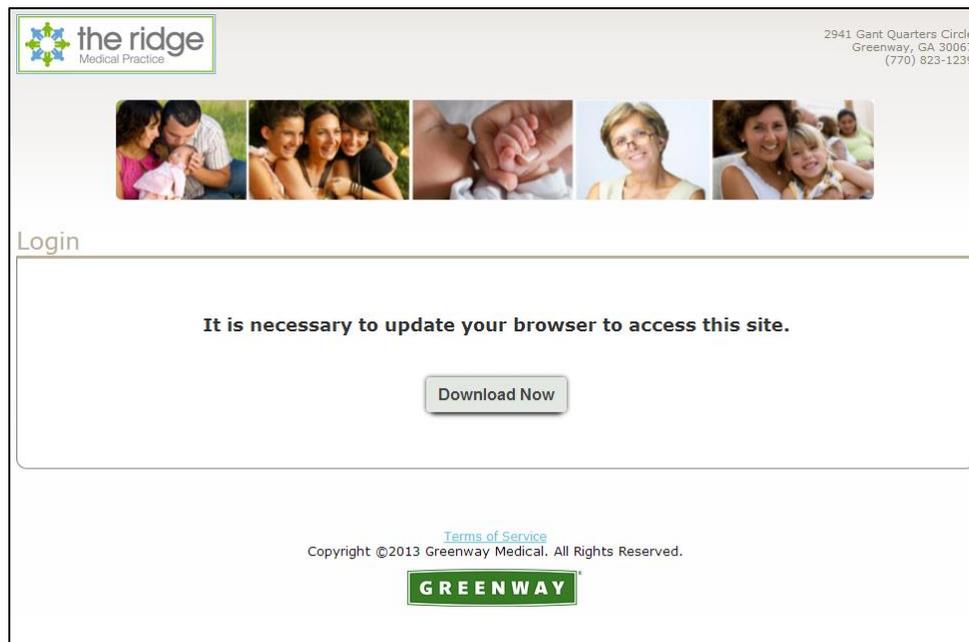
**GREENWAY**

## Browser Requirements

The portal is not supported in all browser types or browser versions. If your browser is not supported, a message will notify you along with a link to a webpage where you can update your browser.

To check if your browser is supported:

1. Go to the portal login page.
  - a. If your browser is supported, you will be able to login without receiving a message.
  - b. If your browser version does not meet the minimum browser version supported, you will receive this message:



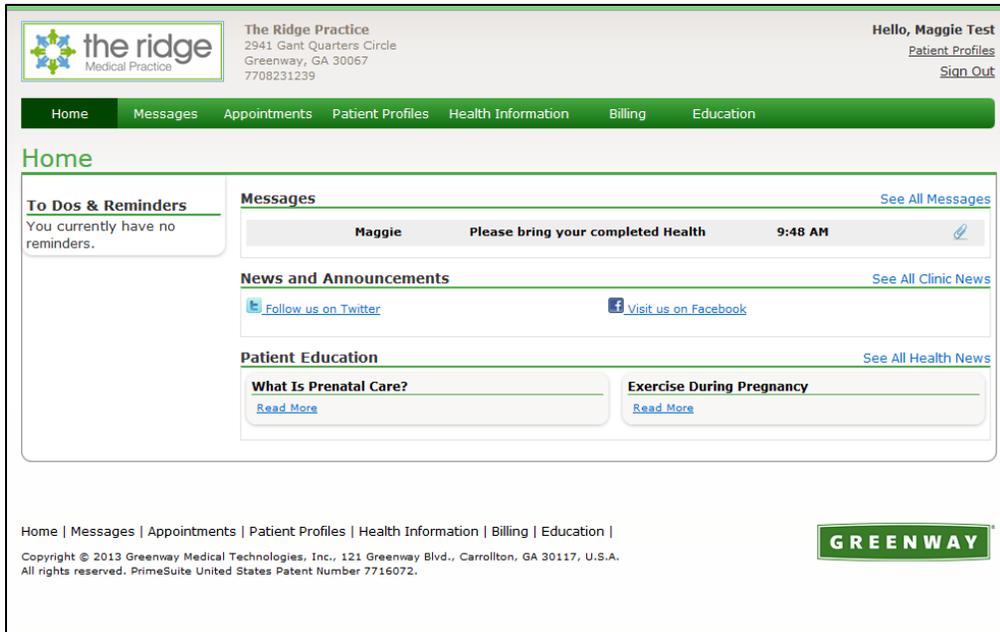
- c. If your browser is not fully supported, you will receive a message stating that the portal might not function correctly:



2. Click the “Download Now” button. This will take you to a webpage that will allow you to update your browser. Follow the steps provided on this webpage to upgrade your browser.
3. Go back to the login page. You will now be able to access the portal.

## Home

The **Home Page** is where you are taken after logging in to the portal. The **Home Page** shows your To Do List and Reminders, new Messages received, News and Announcements relating to your doctor’s office, and Educational items.



## To Do's & Reminders

The To Do's & Reminders section will show any forms that need to be completed, upcoming appointments, or lab/scans that need to be reviewed.

## Messages

The most recent messages received from the practice will be shown on the homepage.

## News and Announcements

This section will include news and announcements related to the doctor's office. There might also be links to the physician's Twitter account or Facebook page in this section.

## Patient Education

Links to educational material regarding your health will be shown in this section.

## Messages

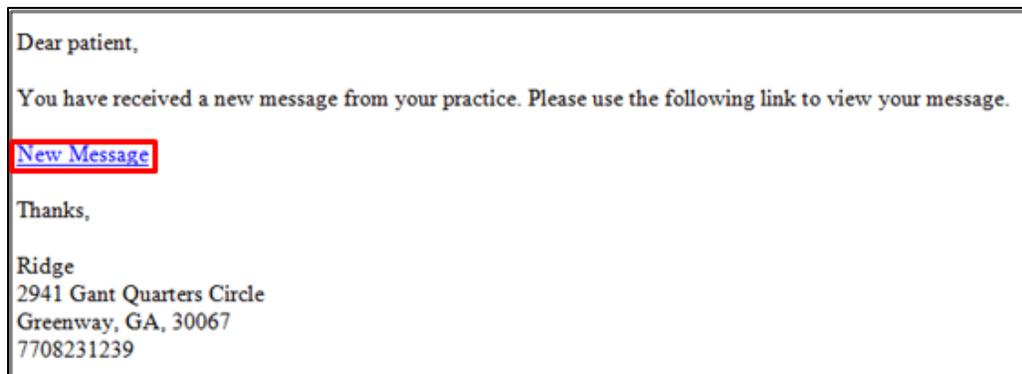
The **Messages** tab allows you to send and receive secure messages to and from the practice. For example, you might use the portal to send a message to the nurse or doctor, send a billing or insurance question, request a prescription refill, request an appointment, or send a general message to the office.

Your doctor's office may send you a secure message to the portal. These messages may include lab results and visit summaries, responses to messages you send to the office, messages requesting additional information, etc. You can view all communications from the practice through your patient portal.

## Notification Email

When your doctor's office sends you a message on the portal, an email will be sent to the email address your doctor's office has on file notifying you that you have a new message. The email subject will be **You have a new message from your practice.**

The body of the email will look like this:

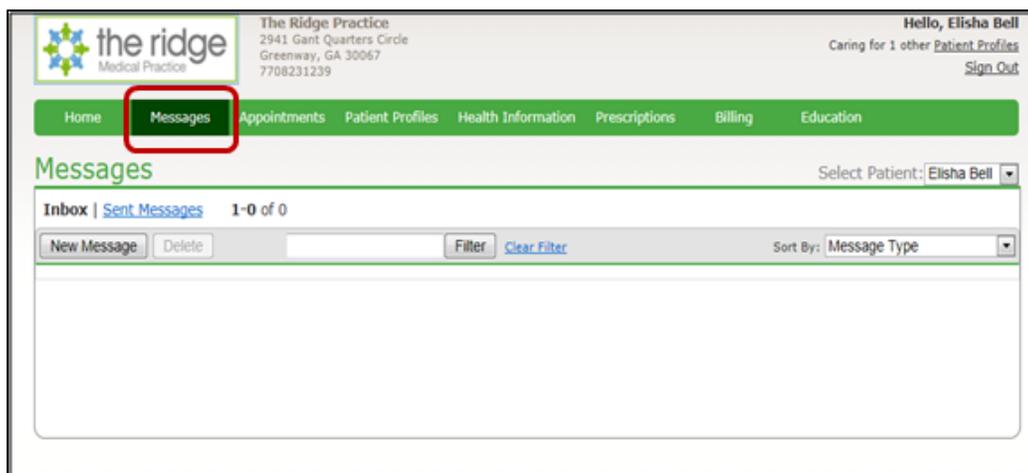


Clicking the **New Message** link should take you to the login page for your portal.

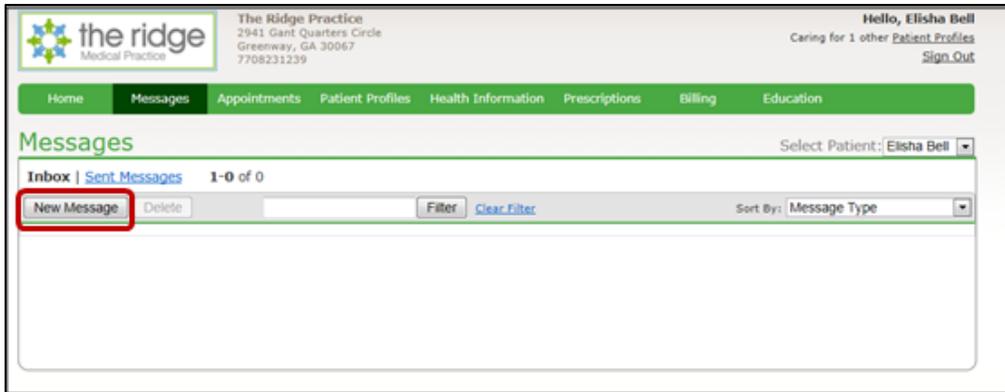
### Send New Message to Practice Staff

To send a new message to your doctor's office:

1. **Login** to the portal.
2. Click the **Messages** tab on the navigation bar.

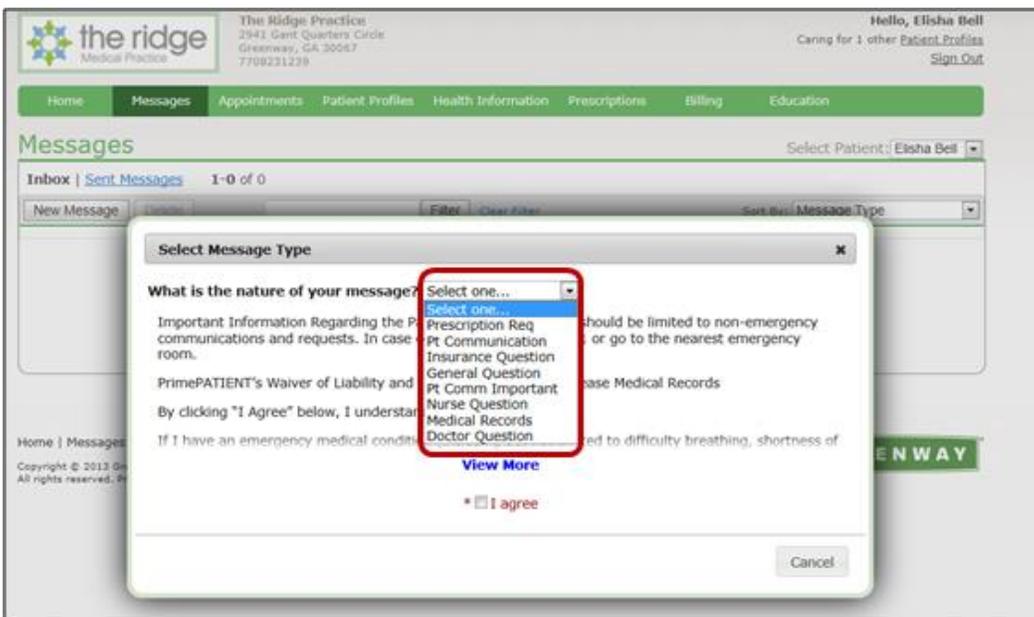


3. By default, the Inbox will appear.
4. Click the **New Message** button.



5. Select the type of message you would like to send.

**Note:** Your doctor's office may have message types that are different than the types shown.



6. After selecting the Message type, read the Consent form and select **I Agree**.

7. Click **Continue**.
8. A New Message box will appear.

9. Complete each section and enter your message to the office. If a field is required, a red asterisk will appear.

**Note:** Your doctor's messages may have different sections than the fields shown.

10. After you type in your message, click the **Send** button.
11. A copy of the message you sent will now appear in the **Sent Messages** folder.

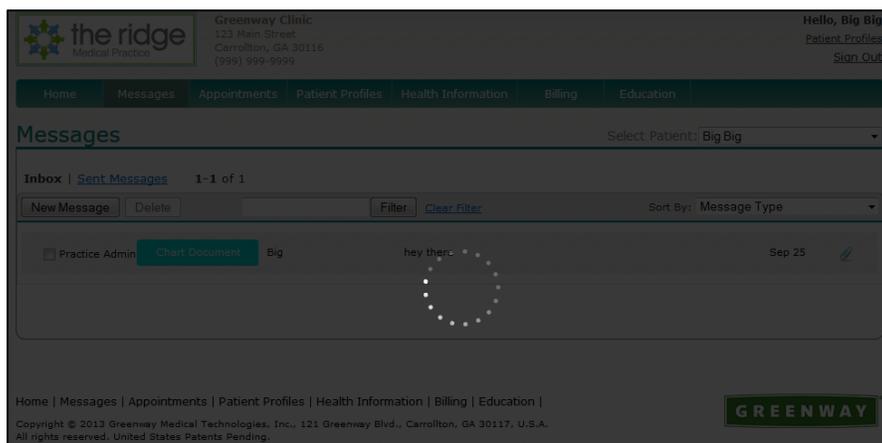
### View and Reply to a Message from Practice Staff

To view a received message and/or reply to a message:

1. **Login** to the portal.
2. Click the **Messages** tab on the navigation bar.



3. A loading box will appear while the portal connects to the doc server.

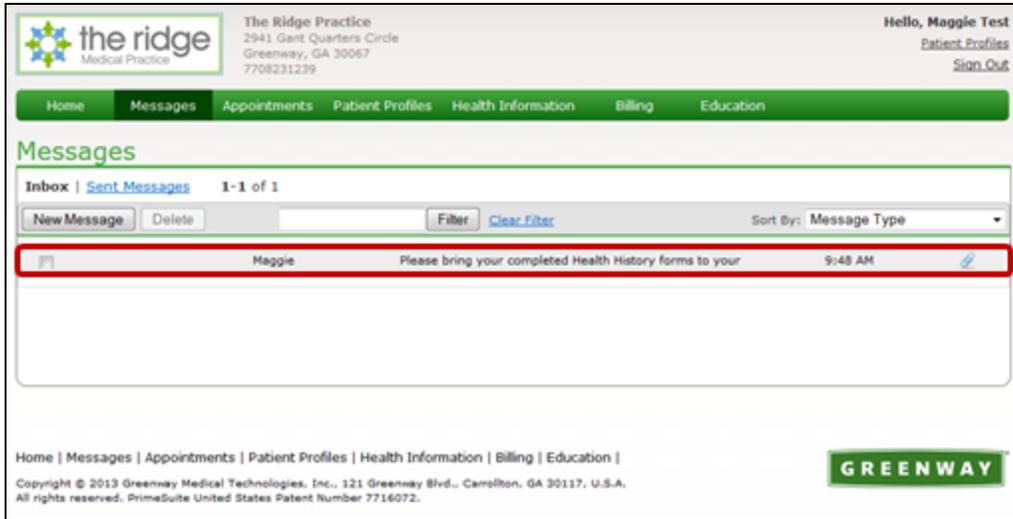


4. By default, the Inbox will appear. All messages received from the practice will be displayed in the Inbox unless a message has been deleted.

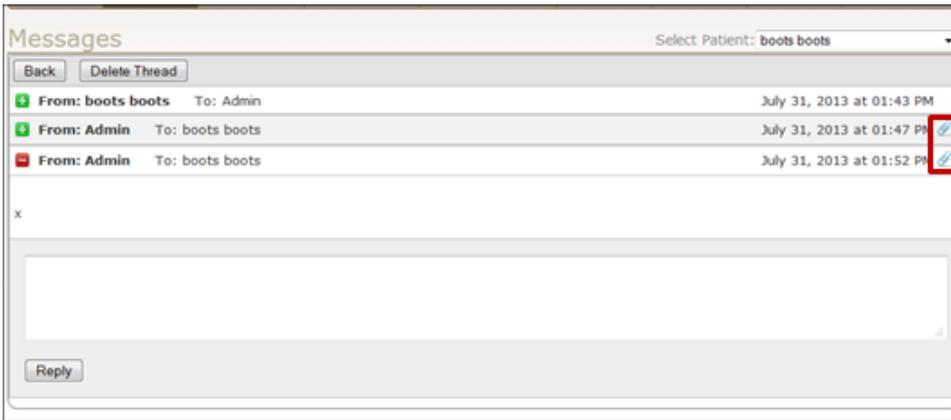


- a. The **Sender, Message Type, Patient, First Line of the Message,** and **Date** of the message or **Time** of the message if sent on the current date should show for all messages in the Inbox, in the Sent messages, and on the Home page.
- b. The **attachment paperclip** should only show on messages that have an attachment.

- c. Ten messages will display per page.
5. To select the message you would like to view, click on the message.



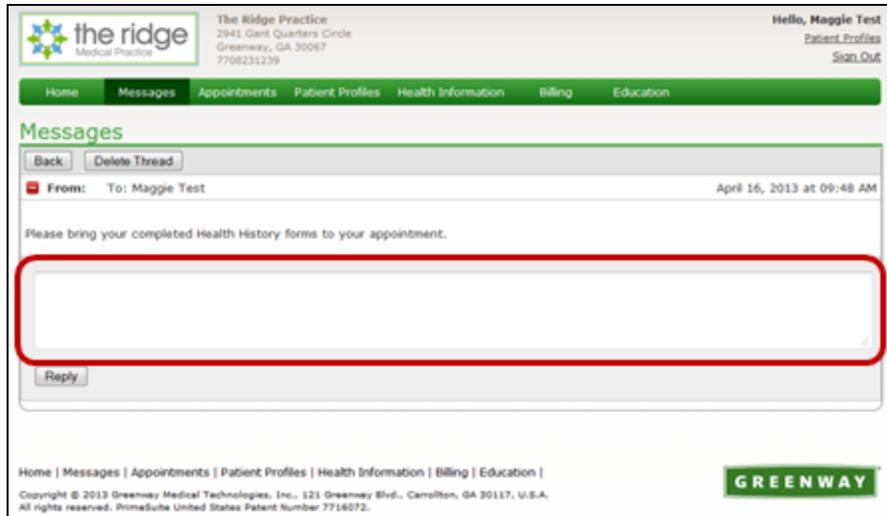
6. The message will appear.



- a. Historical messages will display when a message is opened.
- b. Each individual message with an attachment has a paperclip icon next to it. Click on the paperclip to open the attachment.

**Note:** If a connection to the document server cannot be established, a message will appear stating that the attachment cannot be viewed at this time.

7. To **reply**, type your message in the message text box below the incoming message.

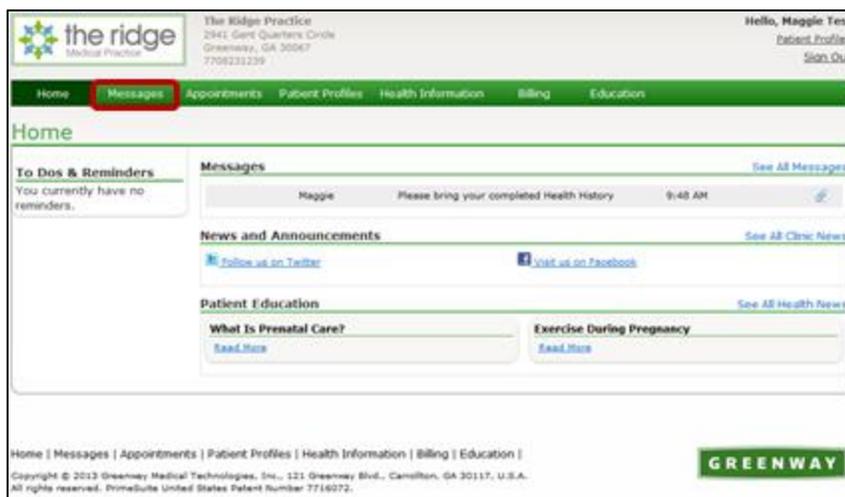


8. Click the **Reply** button to send the message. Your reply has been sent and will be saved in the Sent Messages folder until you delete it.

## View Sent Messages

To view messages you sent to the doctor's office:

1. **Login** to the portal.
2. Click the **Messages** tab on the navigation bar.



3. By default, the Inbox will appear.
4. Click the **Sent Messages** link.



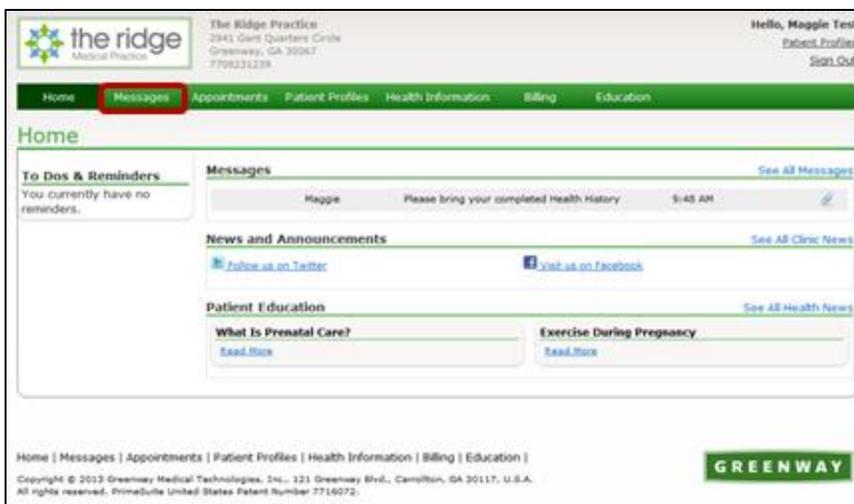
5. The sent messages will appear.

### Sort Messages

After having a portal account for some time, your message list might grow large and it will be difficult to find a message. In this instance you can sort the message list by Message Type, Message Sender, Date Received Ascending, Date Received Descending, and Has Attachments.

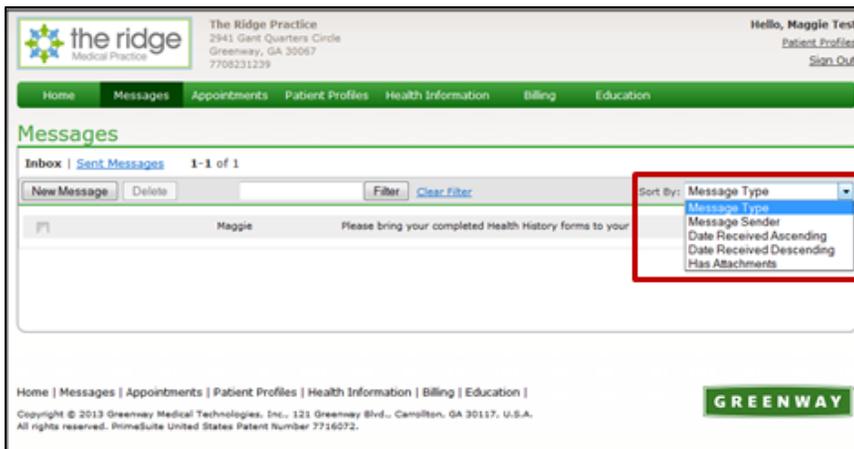
To sort the message list:

1. **Login** to the portal.
2. Click the **Messages** tab on the navigation bar.



3. By default, the Inbox will appear. You can sort messages in the Inbox or in the Sent Messages list.

- Hit the dropdown box next to **Sort By** and select the way you would like to sort the messages.



- The messages will now be sorted.

### Filter Messages

After having a portal account for some time, your message list might grow large and it will be difficult to find a message. In this instance you can filter the message list to find a message containing a certain word or phrase.

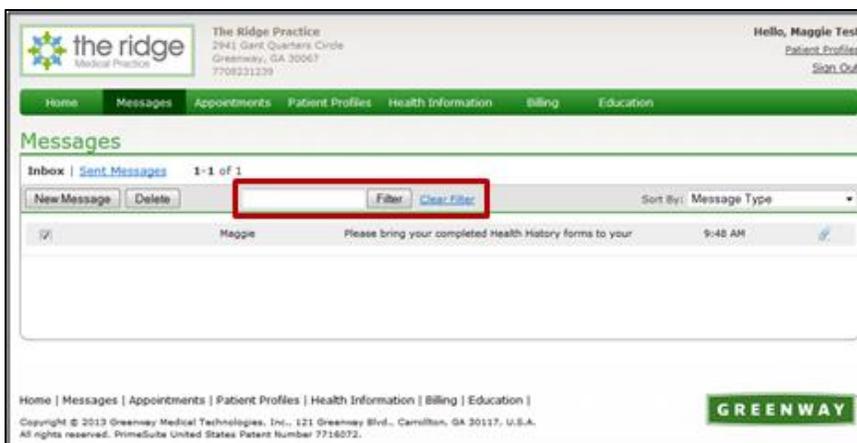
To filter the message list:

- Login** to the portal.
- Click the **Messages** tab on the navigation bar.



- By default, the Inbox will appear. You can filter messages in the Inbox or in the Sent Messages list.

4. Type in a word or phrase in the **Filter Box** and hit **Filter**. Only messages containing the entered word or phrase will show in the Inbox or Sent Messages list.

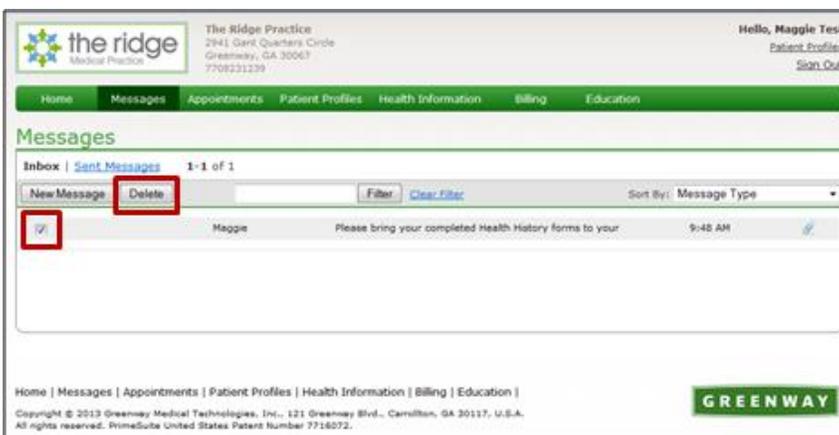


5. To clear the filter and show all messages again, hit **Clear Filter**.

## Delete a Message

To delete a message received from your doctor's office or a message you sent to the office:

1. **Login** to the portal.
2. Click the **Messages** tab on the navigation bar.
3. By default, the Inbox will appear.
4. Select the check box beside the message you would like to delete. You can select multiple messages.
5. Click the **Delete** button.



Your messages have now been deleted.

## **Reminders**

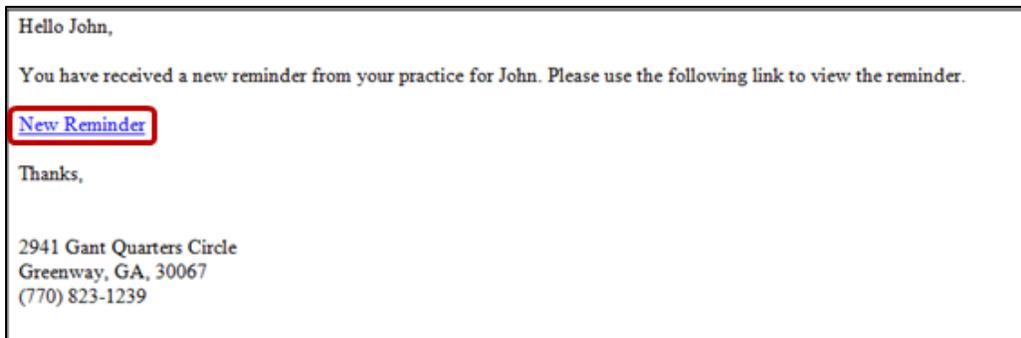
The **Reminders** tab allows you to view reminders sent to you or your dependents from the doctor's office. You can receive reminders about appointments and custom reminders. Custom reminders will be reminders asking you to take a certain action, such as setting up an annual check-up.

You can customize how long the reminders will be available for review and whether or not you receive an email when a new reminder is sent to the portal in the section titled "Account Preferences."

## **Notification Email**

When your doctor's office sends you a reminder on the portal, an email will be sent to the email address your doctor's office has on file notifying you that you have a new reminder. The email subject will be **You have a new reminder from your practice.**

The body of the email will look like this:

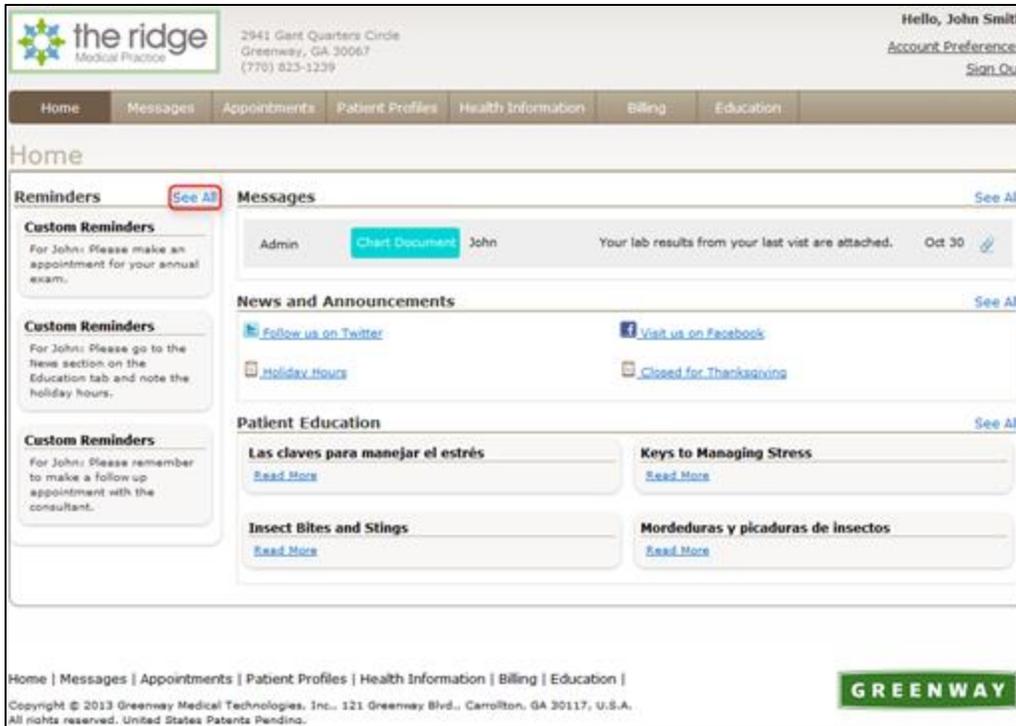


Clicking the **New Reminder** link will take you to the login page for your portal.

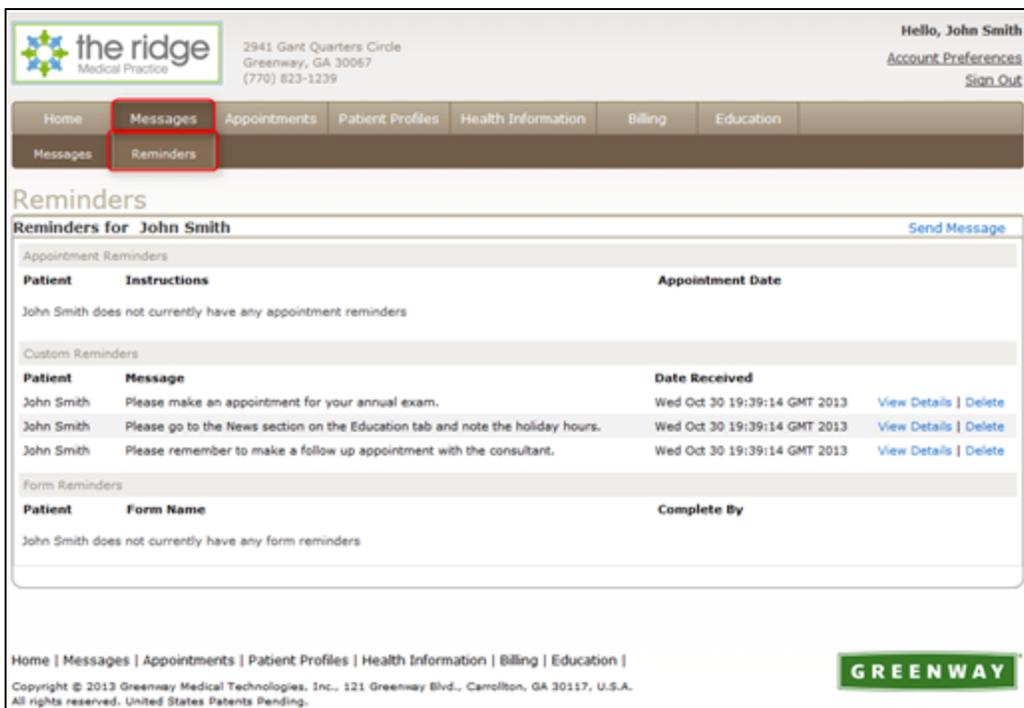
## **View & Delete Reminders**

To view a reminder and/or delete a reminder that has already been viewed and completed:

1. **Login** to the portal.
2. Click **See All** or go to the **Messages** tab, and then click on the **Reminders** sub tab.



Or



- The reminders displayed are based on the patient selected in the patient picker. To view a different patient’s reminders, change the patient in the dropdown box, or select View All to view all patients’ reminders.

- To view more information for each reminder, click **View Details**.
- Once you no longer want the reminder displaying on the screen, you can click **Delete** to remove the reminder.

## Send a Message Inquiring About a Reminder

To send a new message to your doctor's office:

- Login** to the portal.
- Click **See All** or go to the **Messages** tab, and then click on the **Reminders** sub tab.
- Click the **Send Message** button.

The screenshot shows the patient portal interface for 'the ridge Medical Practice'. The user is logged in as John Smith. The main content area is titled 'Reminders for John Smith' and includes a 'Send Message' button. Below this, there are three sections: Appointment Reminders, Custom Reminders, and Form Reminders. The Custom Reminders section contains a table with three rows of reminders.

Patient	Instructions	Appointment Date
John Smith does not currently have any appointment reminders		
Custom Reminders		
Patient	Message	Date Received
John Smith	Please make an appointment for your annual exam.	Wed Oct 30 19:39:14 GMT 2013
John Smith	Please go to the News section on the Education tab and note the holiday hours.	Wed Oct 30 19:39:14 GMT 2013
John Smith	Please remember to make a follow up appointment with the consultant.	Wed Oct 30 19:39:14 GMT 2013
Form Reminders		
Patient	Form Name	Complete By
John Smith does not currently have any form reminders		

At the bottom of the page, there is a navigation menu and a copyright notice: Copyright © 2013 Greenway Medical Technologies, Inc., 121 Greenway Blvd., Carrollton, GA 30117, U.S.A. All rights reserved. United States Patents Pending. The Greenway logo is also present.

- Complete each section and enter your message to the office. If a field is required, a red asterisk will appear.

The screenshot displays the PrimePATIENT patient portal interface. At the top, the user is logged in as John Smith, with options for Account Preferences and Sign Out. The navigation bar includes Home, Messages, Appointments, Patient Profiles, Health Information, Billing, and Education. The 'Reminders' section is active, showing a list of reminders on the left. A modal window titled 'General Question' is open, containing the following fields:

- Additional Details:**
  - Patient: John Smith (dropdown)
  - Form in Question: Select One... (dropdown)
  - Symptoms & Complaints: [Text area]
  - Physician: Select One... (dropdown)
  - Upcoming Appointment: Select One... (dropdown)
  - Your Location: Select One... (dropdown)
  - Billing Range: Start Date: [Text field]
  - Billing Range: End Date: [Text field]
- Nature of Message:**
  - Message Body: [Text area]

Buttons for 'Send' and 'Cancel' are located at the bottom of the modal.

**Note:** your doctor's messages may have different sections than the fields shown.

5. After you type in your message, click the **Send** button.
6. A copy of the message you sent will now appear in the **Sent Messages** folder.

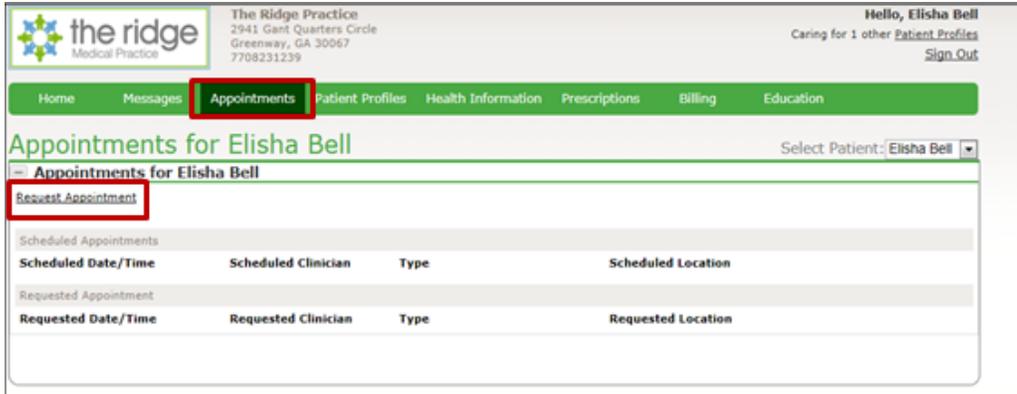
## Appointments

You can use the portal to request an appointment for a particular date and time. Your request will be sent to the practice for confirmation. The practice will either schedule the appointment and send a confirmation, or deny your requested appointment due to availability.

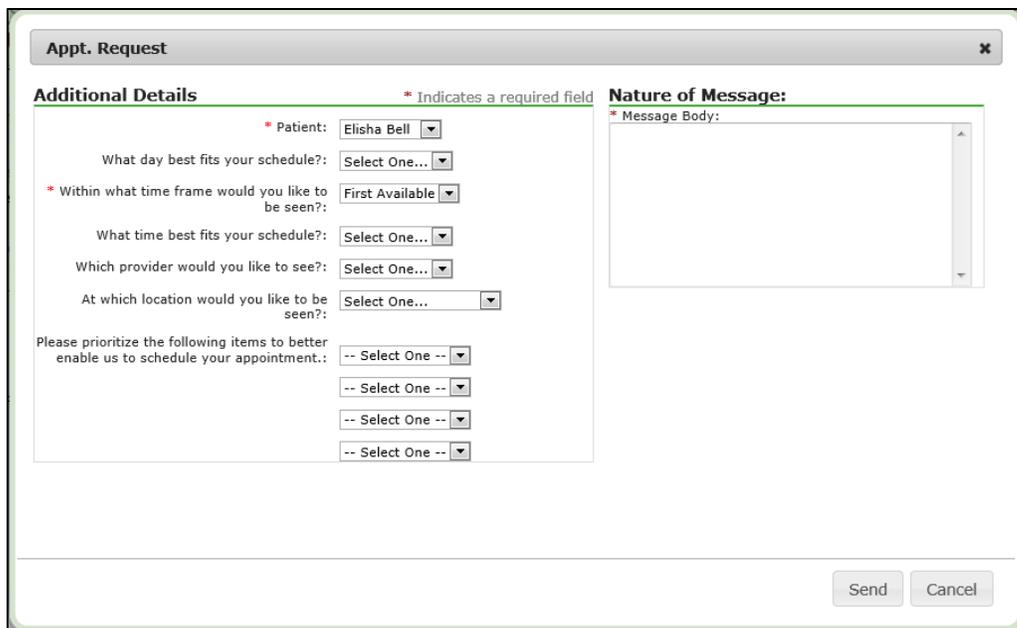
### **Request an Appointment**

To request an appointment with your doctor:

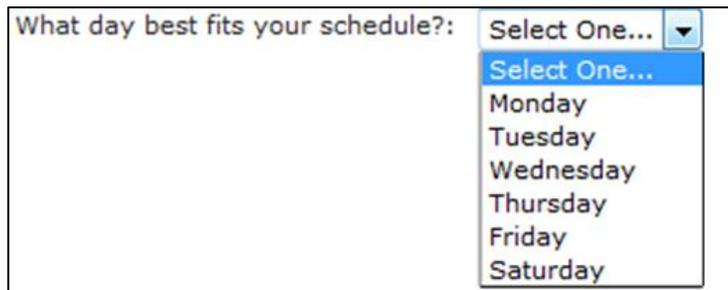
1. **Login** to the portal.
2. Click the **Appointments** tab on the navigation bar.
3. Click the **Request Appointment** button.



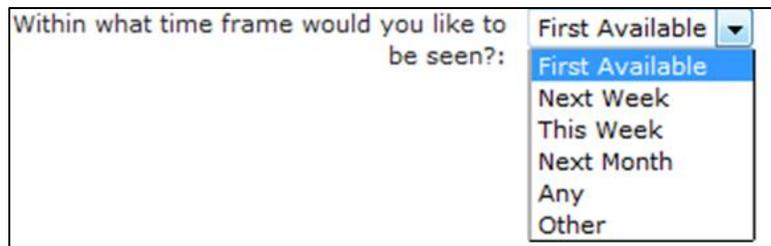
4. The Request Appointment page will appear as a pop up window.



- a. Click the dropdown to select the **Patient** for whom the appointment is for.
- b. Click the dropdown to select which **Day** works best for you



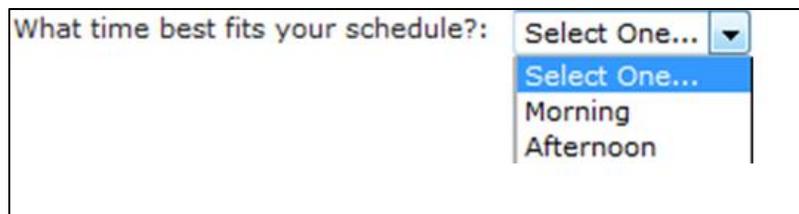
- c. To indicate the **Time Frame** for your requested appointment, click the down arrow then select (click) your choice from the dropdown list. To be seen as soon as possible, click the **First Available** option.



Within what time frame would you like to be seen?:

- First Available
- Next Week
- This Week
- Next Month
- Any
- Other

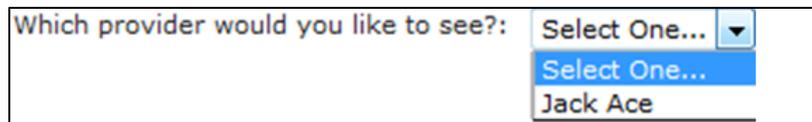
- d. Select the **Time** (morning or afternoon) that will best fit your schedule.



What time best fits your schedule?:

- Select One...
- Morning
- Afternoon

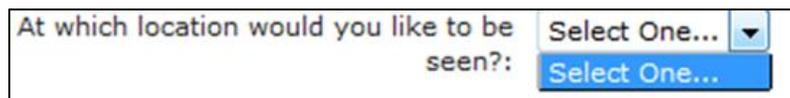
- e. To indicate a **Provider** preference for your appointment request, click the down arrow then select (click) your choice from the dropdown list. (The list of providers you will see will be different from the list you see below.)



Which provider would you like to see?:

- Select One...
- Jack Ace

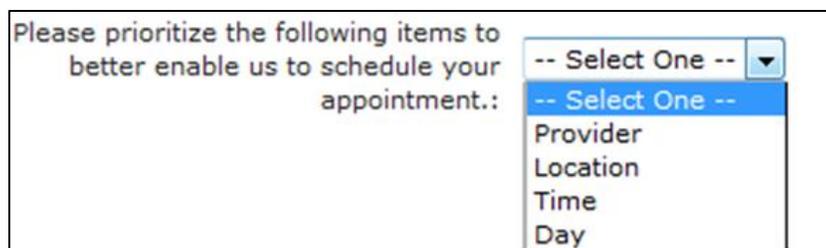
- f. If applicable, select the **Location** for your appointment.



At which location would you like to be seen?:

- Select One...

- g. In order to better fulfill your request, the practice will need to know which of the above choices is most important to you. **Prioritize** the appointment items by choosing the most important item first.

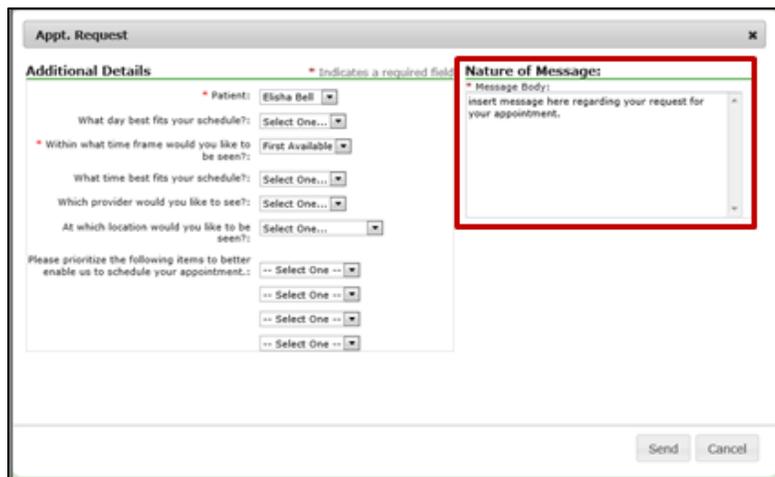


Please prioritize the following items to better enable us to schedule your appointment.:

- Select One --
- Provider
- Location
- Time
- Day

Once a choice is selected, the choice should not display again as a choice for the proceeding priority dropdown boxes.

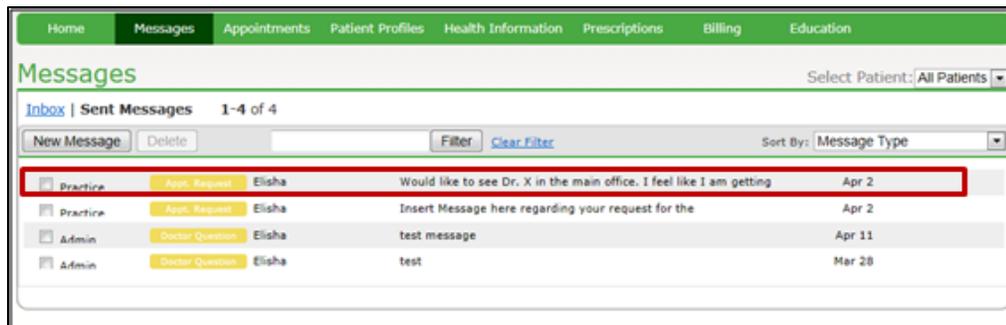
- h. Add any **additional information** about your appointment request that will be helpful for the practice to know. For example, you might describe the symptoms you are experiencing. You will type this information in the **Message Body** text box.



- When all required information has been entered, click the **Send** button. Clicking the **Cancel** button will close the window and you will lose all of your selections.
- If a required field is missing, the missing field will be highlighted when you hit **Send**. Enter the missing information and then hit **Send** again.

Sending an appointment request will send the Appt Request message type to PrimeSUTTE® via taskcreate.

A copy of your appointment request can be found in your Sent Messages page.



The requested appointment will appear in your list of requested appointments on the **Appointments** tab while waiting for practice approval.

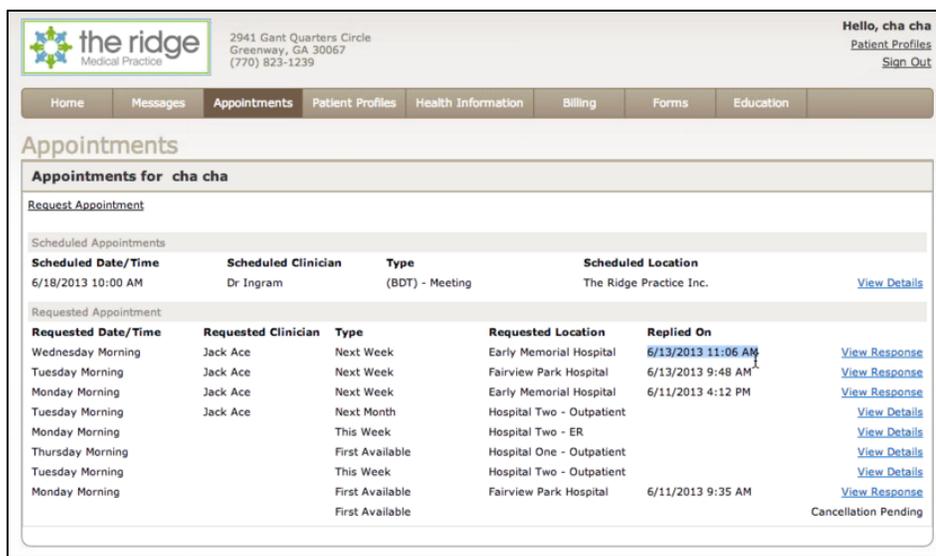
Once the appointment has been scheduled, you will receive an e-mail message confirming your appointment. The scheduled appointment will now move from the **Requested Appointments** list to the **Scheduled Appointments** list with an appointment date and time.

### View Requested and/or Scheduled Appointments

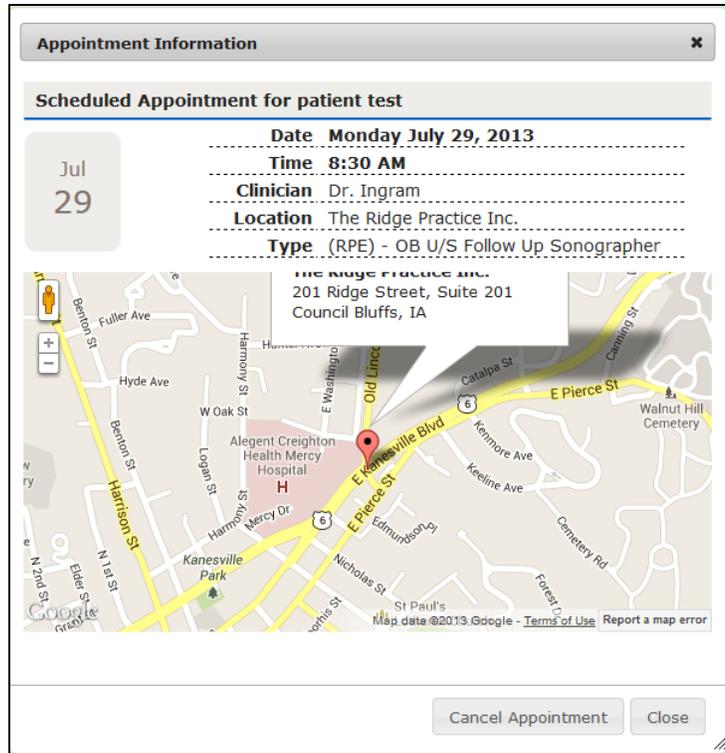
Scheduled Appointments are being run upon selection of the tab in the portal.

To view requested and/or scheduled appointments:

1. **Login** to the portal.
2. Click the Appointments tab on the navigation bar. The scheduled appointments will show under the **Scheduled Appointments** section. The requested appointments will show under the **Requested Appointment** section.



3. To view the details of a scheduled appointment, click the **View Details** link. A new message window will open showing the appointment details.
  - A. The Detail View for scheduled appointments shows the Appointment Date, Time, Clinician, Location, Type of Appointment, and a map to the associated location.



- a. Scheduled Appointment for [Patient Name] should be at the top of the window.
  - b. The correct month and date should be seen in the box to the left of the appointment details.
  - c. The practice name and address should be seen in a message window on the map.
  - d. On the map, dragging the  symbol will change the view to street view at the location the  is dropped. Press the x in the top right corner to exit street view.
  - e. The plus sign zooms in the map. The minus sign zooms out of the map.
  - f. Press  in the lower right corner of the window to expand the window.
  - g. Click **Close** to exit the appointment details window.
- B. To view the details of a requested appointment, click the “View Details” link. A new message window will open showing the requested appointment details.
- a. The Detail View for requested appointments shows the information filled out when requested an appointment: What day best fits your schedule, Within what time frame would you like to be seen, What time best fits your schedule, Which provider would

you like to see, At which location would you like to be seen, and the message entered.

- b. Scheduled Appointment for [Patient Name] should be at the top of the window.
  - c. The correct month and date should be seen in the box to the left of the appointment details.
  - d. The practice name and address should be seen in a message window on the map.
  - e. On the map, dragging the  symbol will change the view to street view at the location the  is dropped. Press the x in the top right corner to exit street view.
  - f. The plus sign zooms in the map. The minus sign zooms out of the map.
  - g. Press  in the lower right corner of the window to expand the window.
  - h. Click **Close** to exit the appointment details window.
4. If the office has replied to the appointment request, the date and time the doctor's office replied to the request will be listed. Click the View Response link to open the message sent by the office.

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Hello, cha cha  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages **Appointments** Patient Profiles Health Information Billing Forms Education

## Appointments

### Appointments for cha cha

[Request Appointment](#)

Scheduled Appointments

Scheduled Date/Time	Scheduled Clinician	Type	Scheduled Location	
6/18/2013 10:00 AM	Dr Ingram	(BDT) - Meeting	The Ridge Practice Inc.	<a href="#">View Details</a>

Requested Appointment

Requested Date/Time	Requested Clinician	Type	Requested Location	Replied On	
Wednesday Morning	Jack Ace	Next Week	Early Memorial Hospital	6/13/2013 11:06 AM	<a href="#">View Response</a>

5. The message sent from the office will open in a window.

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Hello, cha cha  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages **Appointments** Patient Profiles Health Information Billing Forms Education

## Messages

[Back](#) [Delete Thread](#)

**From: cha cha** To: Admin June 13, 2013 at 10:59 AM

can I just have a meeting with you?

**From: Admin** To: cha cha June 13, 2013 at 11:06 AM

cha cha has an appointment with James T. Ingram MD on Tuesday, June 18, 2013, at 10:00 AM for (BDT) - Meeting.

[Reply](#)

Home | Messages | Appointments | Patient Profiles | Health Information | Billing | Forms | Education |

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## Cancel Appointment

To cancel a requested appointment and/or a scheduled appointment with your doctor:

1. **Login** to the portal.
2. Click the **Appointments** tab on the navigation bar.

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7708231239

Hello, patient test  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages **Appointments** Patient Profiles Health Information Billing Education

## Appointments

### Appointments for patient test

[Request Appointment](#)

Scheduled Appointments

Scheduled Date/Time	Scheduled Clinician	Type	Scheduled Location	
7/29/2013 8:30 AM	Dr. Ingram	(RPE) - OB U/S Follow Up Sonographer	The Ridge Practice Inc.	<a href="#">View Details</a>

Requested Appointment

Requested Date/Time	Requested Clinician	Type	Requested Location	Replied On	
Wednesday Morning	Doctor Greenway	Next Week	5010 Service Location		<a href="#">View Details</a>

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- Go to the **Appointments for [Patient Name]** section.
- Locate the appointment you wish to cancel. Click the **View Details** link.

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7708231239

Hello, patient test  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages **Appointments** Patient Profiles Health Information Billing Education

## Appointments

### Appointments for patient test

[Request Appointment](#)

Scheduled Appointments

Scheduled Date/Time	Scheduled Clinician	Type	Scheduled Location	
7/29/2013 8:30 AM	Dr. Ingram	(RPE) - OB U/S Follow Up Sonographer	The Ridge Practice Inc.	<a href="#">View Details</a>

Requested Appointment

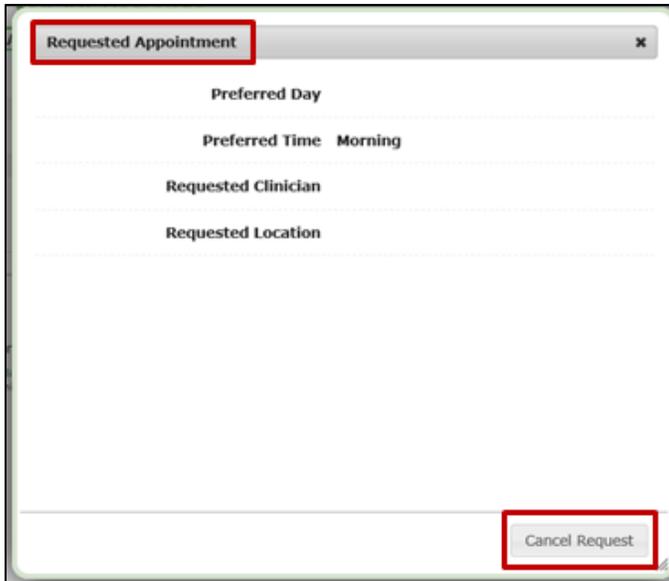
Requested Date/Time	Requested Clinician	Type	Requested Location	Replied On	
Wednesday Morning	Doctor Greenway	Next Week	5010 Service Location		<a href="#">View Details</a>

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- If you are **cancelling a requested appointment**, the Requested Appointment page will appear.



**Requested Appointment** [X]

Preferred Day

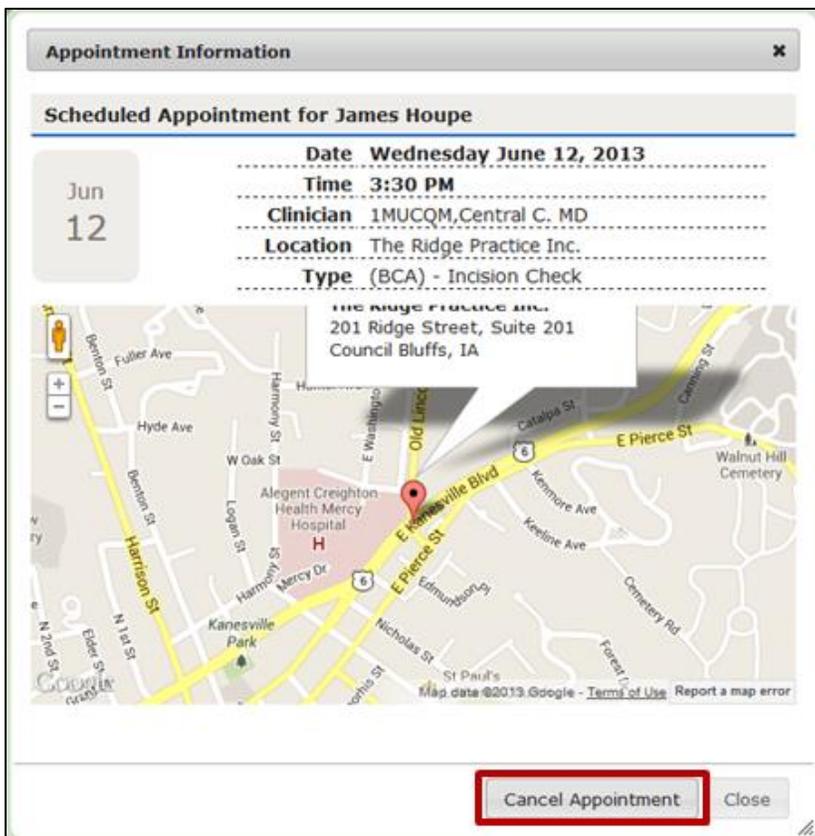
Preferred Time Morning

Requested Clinician

Requested Location

Cancel Request

If you are **cancelling a scheduled appointment**, the Scheduled Appointment page will appear.



**Appointment Information** [X]

**Scheduled Appointment for James Houpe**

Jun 12

Date Wednesday June 12, 2013

Time 3:30 PM

Clinician 1MUCQM, Central C. MD

Location The Ridge Practice Inc.

Type (BCA) - Incision Check

The Ridge Practice Inc.  
201 Ridge Street, Suite 201  
Council Bluffs, IA

Cancel Appointment Close

6. Do one of the following:

A.) Click the **Cancel Request** button to cancel a requested appointment.

- B.) Click the **Cancel Appointment** button to cancel a scheduled appointment.
7. Once a cancellation request has been submitted, Cancellation Pending will show in place of the View Details link.

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Hello, maggie test  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages Appointments Patient Profiles Health Information Billing Forms Education

### Appointments

Appointments for maggie test

[Request Appointment](#)

Scheduled Appointments

Scheduled Date/Time	Scheduled Clinician	Type	Scheduled Location	
6/24/2013 8:30 AM	New Resource	(BOT) - BP Check Only	The Ridge Practice Inc.	<a href="#">Cancellation Pending</a>

Requested Appointment

Requested Date/Time	Requested Clinician	Type	Requested Location	Replied On
Tuesday Morning		This Week	Early Memorial Hospital	<a href="#">Cancellation Pending</a>

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8. If the user decides to cancel the appointment they can select Cancel Appointment and an “Appt Cancel” message type will be sent to PrimeSUITE via taskcreate with all of the appointment information for the appointment that needs to be cancelled.

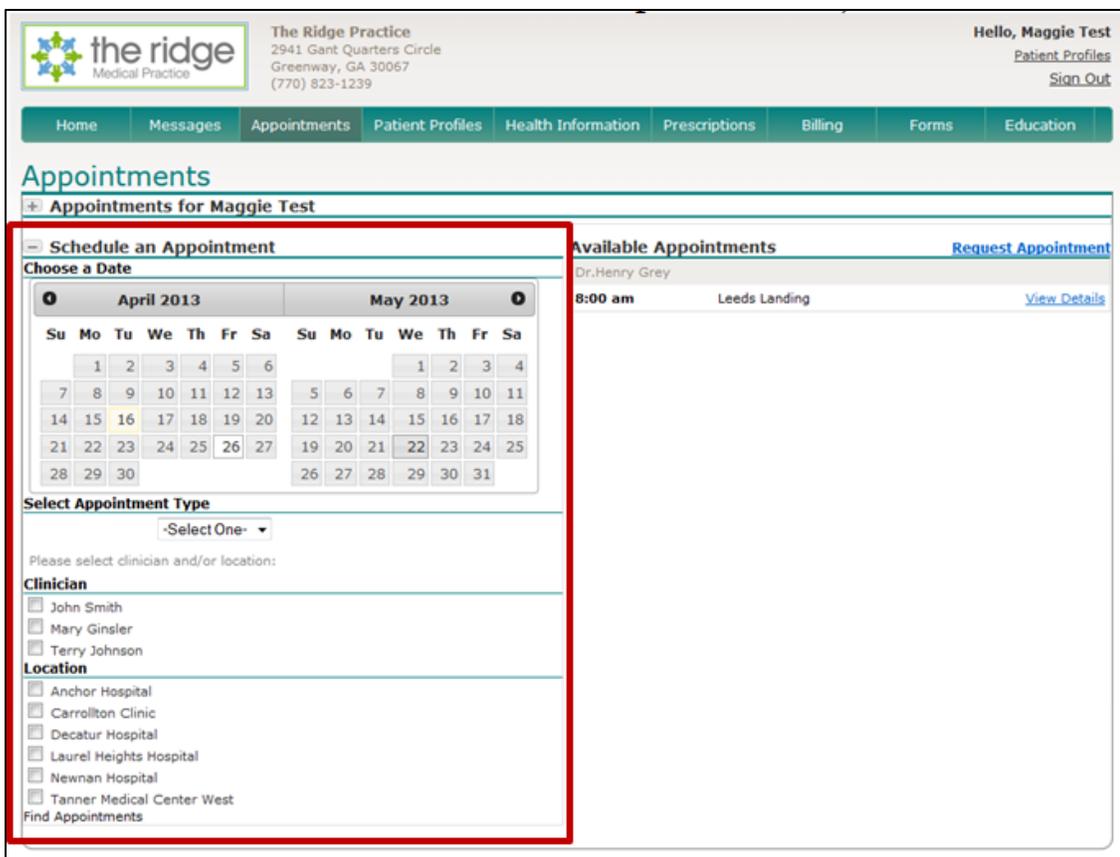
The appointment will not be removed from the Appointments tab until the doctor’s office has removed the appointment in their system.

### Schedule a Real-time Appointment (if available)

Your doctor’s office may allow you to schedule an appointment through the portal directly into their scheduling system. This is called Real-time appointment scheduling. Not all doctor’s offices use this feature.

To schedule a real-time appointment with your doctor:

1. **Login** to the portal.
2. Click the **Appointments** tab on the navigation bar.
3. In the **Schedule an Appointment** section: (**Note:** The options you will see will be different than the options below).



- a. Use the calendar to select the date you wish to come into the office.
  - b. Select the appointment type from the drop-down menu.
  - c. Select the clinician you wish to schedule an appointment with.
  - d. If your practice has multiple locations, select the location you wish to be seen.
  - e. Click the **Find Appointments** button.
4. A list of available appointments will appear in the **Available Appointments** section.

The screenshot shows the 'Appointments' section for Maggie Test. It features a calendar for April and May 2013, a 'Select Appointment Type' dropdown, and a list of available appointments. The 'Available Appointments' section is highlighted with a red box, showing an appointment for Dr. Henry Grey at 8:00 am at Leeds Landing, with a 'View Details' link.

5. Click **View Details** beside the appointment you want to schedule.
6. Click the **Schedule Appointment** button.
7. Your appointment has now been scheduled. The appointment will appear under the Scheduled Appointments section. (**Note:** It might take a few minutes for the appointment to appear.)

If there is not an open appointment during your requested time, you can request an appointment by clicking the Request Appointment link and then following the steps in the section titled "Request an Appointment."

## **Patient Profiles**

The patient portal will allow you to view and update your personal information including basic contact information, employment information, insurance information, preferred doctor, and preferred pharmacy. Any time you add, delete, or update information in the Patient Profiles section, your request will be sent to the practice for confirmation.

### **View a Summary of All My Basic Contact Information**

To view a summary of your patient profile:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. The **Summary** page will automatically load.
4. On this page, you can view a brief summary of the information your doctor has on record for you. If there has been a request to update a field, the updated information or field will not show until the practice accepts it.

The screenshot displays the PrimePATIENT Patient User Guide interface. At the top, the logo for 'the ridge Medical Practice' is shown, along with the address: 2941 Gant Quarters Circle, Greenway, GA 30067, and phone number (770) 823-1239. The user is logged in as 'boots boots' and is viewing the 'Patient Profiles' page. The navigation bar includes tabs for Home, Messages, Appointments, Patient Profiles (highlighted), Health Information, Billing, Forms, and Education. Below the navigation bar, there are sub-tabs for Summary (highlighted), Basic Information, Employment, Insurance, and Preferred Provider. The main content area shows the 'Patient Profiles' section for 'boots boots'. A dropdown menu labeled 'Select Patient: boots boots' is visible. The 'BASIC INFORMATION' section includes fields for Name, Address, Primary Phone, Email, Date of Birth, and SSN. The 'EMPLOYMENT' section shows a table with columns for NAME, STATUS, ACTIVE, and PHONE. The 'INSURANCE' section shows a table with columns for TYPE, NAME, POLICY #, GROUP #, EFFECTIVE DATE, and ACTIVE. The 'PROVIDERS' section shows a field for Preferred providers. A disclaimer at the bottom states: '\*\*The information displayed is a reflection of the information in your doctor's system and may not be editable or reflective of the information you have entered.' The footer includes the Greenway logo and copyright information: Copyright © 2013 Greenway Medical Technologies, Inc., 121 Greenway Blvd., Carrollton, GA 30117, U.S.A. All rights reserved. United States Patents Pending.

To select another patient's information to view or edit, select the patient from the dropdown box.

### Basic Information: View and/or Update

To view and/or update your basic contact information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Basic Information** tab on the navigation bar, OR click the **Update** link in the **Basic Information** section.

**Note:** To select another patient's information to view or edit, select the patient from the dropdown box.

4. You can view your contact information that your doctor has on file for you.
5. If you wish to update this information, go to the field that you need to update.
6. Delete the current information that is in that field.
7. Enter your new information. When a field is updated, the field will turn yellow.

The screenshot displays the 'Patient Profile' form for Elisha Bell. The form is divided into two columns of input fields. The 'Middle Name' field, containing the letter 'L', is highlighted in yellow and enclosed in a red box. The 'Save Changes' button in the top left corner is also highlighted with a red box. The form includes fields for Patient Id, First Name, Middle Name, Last Name, Preferred Name, Date of Birth, SSN, Drivers License, Gender, Race, Ethnicity, Marital Status, Primary Language, Primary Phone, Evening Phone, Day Phone, Cell Phone, Email, Address Line 1, Address Line 2, City, State, Zip Code, County, and Country.

Field	Value
Patient Id	26097
First Name*	Elisha
Middle Name	L
Last Name*	Bell
Preferred Name	Elisha
Date of Birth*	12/30/1980
SSN	541-24-8908
Drivers License	
Gender	Female
Race	White
Ethnicity	Not Hispanic or L
Marital Status	Married
Primary Language	English
Primary Phone	(770) 548-6879
Evening Phone	(770) 548-6879
Day Phone	
Cell Phone	
Email	elishabell@greenwaymedical.com
Address Line 1	121 Greenway Medical Blvd.
Address Line 2	
City	Carrollton
State	Georgia
Zip Code*	30117
County	Carroll
Country	USA

8. Click the **Save Changes** button. This will create a request, with your changes, that is sent to your doctor's office. The updated field will turn grey when the **Save Changes** button is selected.

The screenshot shows the 'Patient Profile' form for a user named 'boots boots'. The form is divided into two columns of input fields. The left column includes fields for First Name, Middle Name, Last Name, Preferred Name, Date of Birth, SSN, Drivers License, Gender, Race, Ethnicity, Marital Status, and Primary Language. The right column includes fields for Primary Phone, Work Phone, Cell Phone, Email, Address Line 1, Address Line 2, City, State, Zip Code, and Country. A 'Save Changes' button is located at the top left of the form area. A note at the bottom of the form states: '\*\*Fields highlighted in gray contain changes pending approval'. Below the form, there is a footer with navigation links and a 'GREENWAY' logo.

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Hello, boots boots  
Caring for 1 other Patient Profiles  
Sign Out

Home Messages Appointments Patient Profiles Health Information Billing Forms Education

Summary Basic Information Employment Insurance Preferred Provider

Patient Profile Select Patient: boots boots

Save Changes \*required field

First Name: boots  
Middle Name:  
Last Name: boots  
Preferred Name: booty  
Date of Birth: 2/2/1965  
SSN: 782-37-8222  
Drivers License:  
Gender: Unknown  
Race: Unknown  
Ethnicity: Unknown  
Marital Status: None  
Primary Language: English

Primary Phone: (555) 555-7777  
Work Phone:  
Cell Phone:  
Email: john@codescience.com  
Address Line 1:  
Address Line 2:  
City:  
State: Georgia  
Zip Code: 37405  
Country: United States

\*\*Fields highlighted in gray contain changes pending approval

\*\*The information displayed is a reflection of the information in your doctor's system and may not be editable or reflective of the information you have entered.

Home | Messages | Appointments | Patient Profiles | Health Information | Billing | Forms | Education |

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9. As soon as your doctor's office reviews and accepts your updated information, the changes you made will show in the patient portal.

### Employment: View and/or Update Employment

To view and/or update my employment information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Employment** tab on the navigation bar, OR click the **View and Edit All Employments** link in the Employment section.

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Hello, cha cha  
Patient Profiles  
Sign Out

Home Messages Appointments Patient Profiles Health Information Billing Forms Education  
Summary Basic Information Employment Insurance Preferred Provider

Patient Profiles Select Patient: cha cha

New Employment Save Changes (\*required field) Delete Employer

**Bath & Body Works**

Status: --- Please Choose a Status ---  
 Employer: Bath & Body Works  
 Phone:

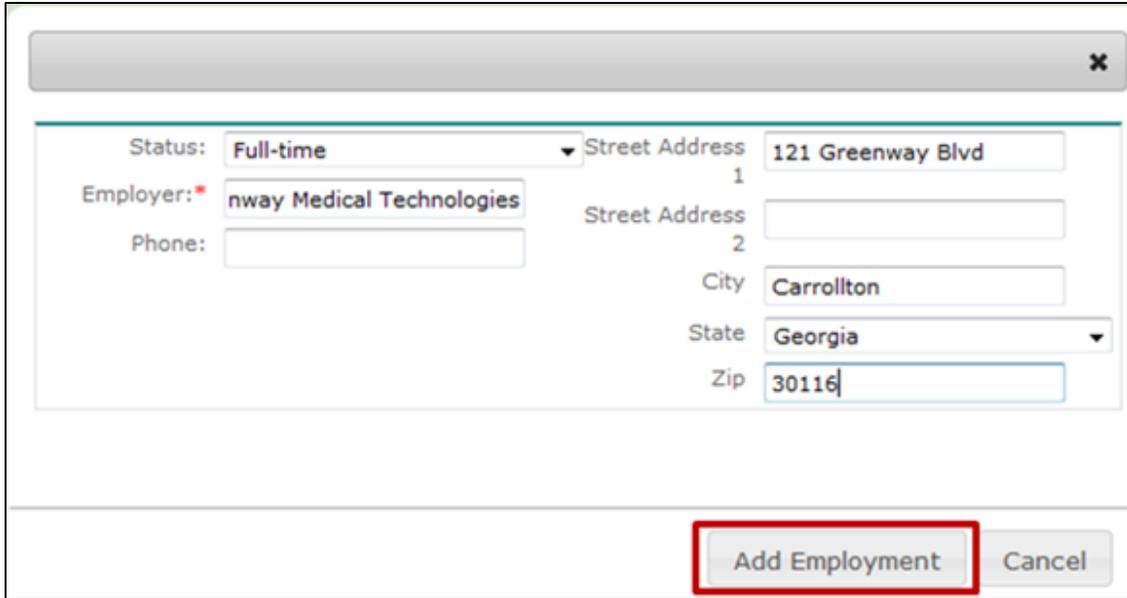
Street Address 1   
 Street Address 2   
 City   
 State: --- Please Choose a State ---  
 Zip

4. You can view your employment information that your doctor has on file for you.
5. If you wish to update this information, go to the field that you need to update.
6. Delete the current information that is in that field.
7. Enter your new information. When a field is updated, the field will turn yellow.
8. Click the **Save Changes** button. This will create a request, with your changes, that is sent to your doctor's office. The updated field will turn grey when the **Save Changes** button is selected.
9. As soon as your doctor's office reviews and accepts your updated information, the changes you made will show in the patient portal.

### Employment: Add New Employment

To add your employment information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Employment** tab on the navigation bar, OR click the **View and Edit All Employments** link in the Employment section.
4. Click the **New Employment** button.
5. A New Employment page will open.
6. Enter your employment information
7. When finished, click the **Add Employment** button.



The screenshot shows a web form for adding employment information. The form is contained within a window with a close button (X) in the top right corner. The form fields are as follows:

- Status: Full-time (dropdown menu)
- Employer: Greenway Medical Technologies (text input)
- Phone: (text input)
- Street Address 1: 121 Greenway Blvd (text input)
- Street Address 2: (text input)
- City: Carrollton (text input)
- State: Georgia (dropdown menu)
- Zip: 30116 (text input)

At the bottom right of the form, there are two buttons: "Add Employment" (highlighted with a red box) and "Cancel".

8. Your new employment information will appear on the patient portal in a read-only format.
9. Click the **Save Changes** button. This will create a request, with your changes, that is sent to your doctor's office.
10. As soon as your doctor's office reviews and accepts your new employment, you will be able to edit your new employment information in the patient portal.

If you have more than one employer, you can add multiple employers in this section.

### Employment: Delete Employment

To delete your employment information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Employment** tab on the navigation bar, OR click the **View and Edit All Employments** link in the Employment section.
4. Click the **Delete Employment** link beside the employment you wish to delete.

The screenshot displays the PrimePATIENT Patient User Guide interface. At the top, the logo for 'the ridge Medical Practice' is visible, along with the address: 2941 Gant Quarters Circle, Greenway, GA 30067, and phone number: (770) 823-1239. The user is logged in as 'cha cha' and is viewing the 'Patient Profiles' section. The navigation bar includes tabs for Home, Messages, Appointments, Patient Profiles, Health Information, Billing, Forms, and Education. The 'Patient Profiles' tab is selected, and the 'Employment' sub-tab is active. The main content area shows the 'Patient Profiles' section for 'Bath & Body Works'. The 'Status' dropdown menu is set to 'Please Choose a Status'. The 'Employer' field is filled with 'Bath & Body Works'. The 'Phone' field is empty. The 'Street Address 1', 'Street Address 2', 'City', 'State' (set to 'Please Choose a State'), and 'Zip' fields are also empty. A red box highlights the 'Delete Employer' button in the top right corner of the form.

5. A Delete Employment Confirmation will open.
6. If you want to delete this employment, click **OK**.
7. If you do not want to delete this employment, click **Cancel**.
8. Your employment information will be removed from the patient portal.
9. A request to delete your employment will be sent to your doctor's office.

### Insurance: View and/or Update Insurance

To view and/or update my insurance information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Insurance** tab on the navigation bar, OR click the **View and Edit All Insurance** link in the Insurance section.
4. You can view the insurance information that you have entered on the portal.

**Note:** for GR, insurance will not be updated from PS; insurance will only be displayed if the patient enters insurance information on the portal.

5. If you wish to update this information, go to the field that you need to update.
6. Delete the current information that is in that field.
7. Enter your new information. When a field is updated, the field will turn yellow.
8. Click the **Save Changes** button. The updated field will turn grey when the Save Changes button is selected.

The screenshot shows a web form titled "Primary Insurance" with a "Save Changes" button highlighted in red. The form contains the following fields and values:

Insurance Company: *	Test Insurance Compa	Address Line 1:	<input type="text"/>
Insurance Plan:	<input type="text"/>	Address Line 2:	<input type="text"/>
Policy Holder:	<input type="text"/>	City:	<input type="text"/>
Policy Number:	99999999	State:	-- Choose a State --
Group Number:	9999	Zip:	<input type="text"/>
Start Date:	04/01/2013	Priority: *	-- Choose Priority --

At the bottom of the form, there is a navigation bar with links: Home | Messages | Appointments | Patient Profiles | Health Information | Prescriptions | Billing | Forms | Education |. Below this is the copyright notice: Copyright © 2013 Greenway Medical Technologies, Inc., 121 Greenway Blvd., Carrollton, GA 30117, U.S.A. All rights reserved. PrimeSuite United States Patent Number 7716072. The Greenway logo is also present.

9. A request, with your changes, will be sent to your doctor's office.

As soon as your doctor's office reviews and accepts your updated information, the changes you made will show in the patient portal.

### Insurance: Add Insurance Coverage

To add your insurance information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Insurance** tab on the navigation bar, OR click the **View and Edit All Insurance** link in the Insurance section.
4. Click the **New Insurance** button.
5. A New Insurance page will open.
6. Enter your insurance information.
7. When finished, click the **Create Coverage** button.

The screenshot shows a web form titled "Insurance" with a close button (X) in the top right corner. The form is organized into two columns of input fields. The left column includes: "Insurance Company:" (with a red asterisk), "Insurance Plan:", "Policy Holder:", "Policy Number:", "Group Number:", and a partially visible "Address Line" field. The right column includes: "Address Line 1:", "Address Line 2:", "City:", "State:" (a dropdown menu with "-- Choose a State --"), "Zip:", and "Priority:" (a dropdown menu with "-- Choose Priority --"). At the bottom right of the form, there are two buttons: "Create Coverage" (highlighted with a red rectangular box) and "Cancel".

8. Your new Insurance information will appear on the patient portal in a read-only format.
9. A request, with your new insurance, will be sent to your doctor's office.
10. As soon as your doctor's office reviews and accepts your new insurance coverage, you will be able to edit your insurance information in the patient portal.

If you have more than one health insurance policy, you can add additional insurance policies in this section.

### Insurance: Delete Insurance Coverage

To delete your insurance information:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.
3. Click the **Insurance** tab on the navigation bar, OR click the **View and Edit All Insurance** link in the Insurance section.
4. Click the **Delete Coverage** link beside the insurance you wish to delete.

5. A Delete Insurance Confirmation window will open.
6. If you want to delete this coverage, click **OK**.



7. If you do not want to delete this coverage, click **Cancel**.
8. Your insurance information will be removed from the patient portal.

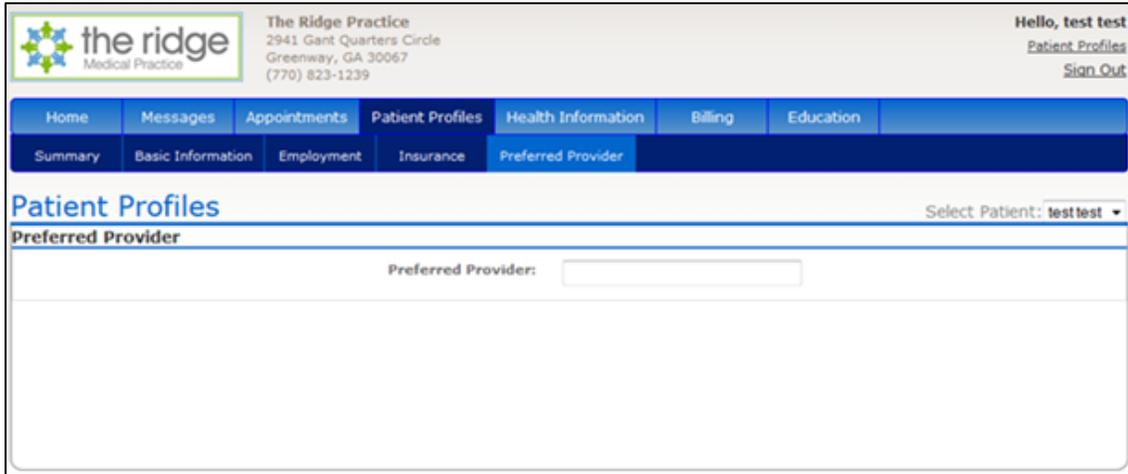
A request to delete your insurance has been sent to your doctor’s office.

### Doctor: Preferred Doctor

Your preferred provider will be displayed on the portal but the information cannot be edited. To view your preferred provider:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar.

3. Click the **Preferred Provider** tab on the navigation bar, OR click the **Update** link in the Providers section.



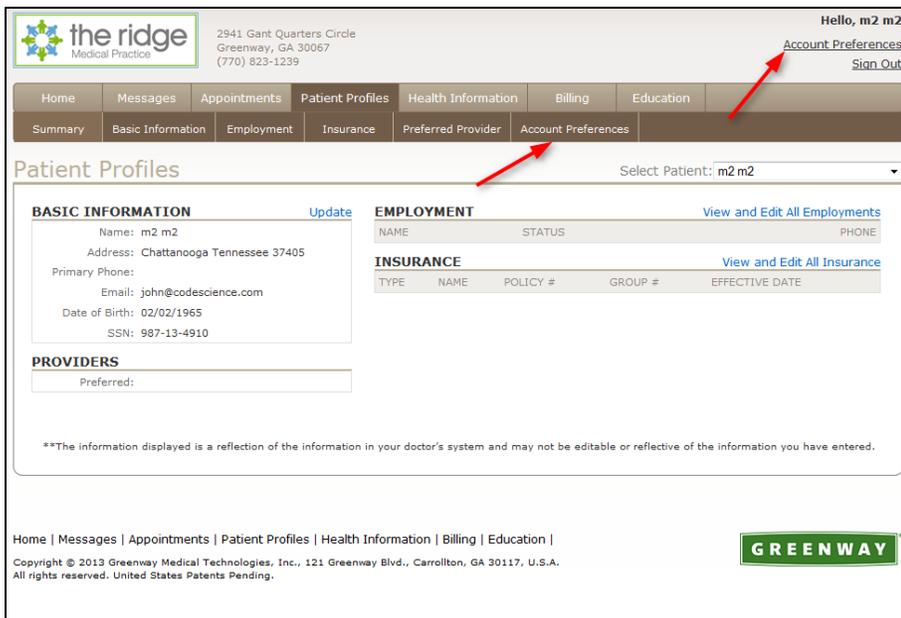
4. You can now view the preferred provider that is selected in your doctor’s system.

### Account Preferences

The account preferences tab allows you to set settings for custom reminders.

To Set Account Preferences:

1. **Login** to the portal.
2. Click the **Patient Profiles** tab on the navigation bar, or the **Account Preferences** link on the top right side of the screen.



3. Click the **Account Preferences** tab on the navigation bar.
4. You can select how many days you want reminders to display on the reminders page and if you want an email sent when a new reminder is available.

the ridge  
Medical Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
(770) 823-1239

Hello, John Smith  
[Account Preferences](#)  
[Sign Out](#)

Home Messages Appointments Patient Profiles Health Information Billing Education  
Summary Basic Information Employment Insurance Preferred Provider Account Preferences

Account Preferences

Save Changes

Reminders Preferences

Days to Display Reminders: Never Stop

Send Reminder Email:  John Smith

Home | Messages | Appointments | Patient Profiles | Health Information | Billing | Education |  
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All rights reserved. United States Patents Pending.

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- a. Select the dropdown box next to **Days to Display Reminders** to select the number of days you want the reminders to display. This field will default to Never Stop.
- b. Check the checkbox next to **Send Reminder Email** if you want to receive reminders; uncheck the checkbox next to **Send Reminder Email** if you do not want to receive reminders. This field will be defaulted as checked.
- c. Click **Save Changes**.

## Health Information

You may view or download a clinical summary concerning your most recent office visit, as well as lab and test results. If the document server is down, an error message will display when the Health Information tab is clicked on notifying the user that this tab is not available at that point in time.

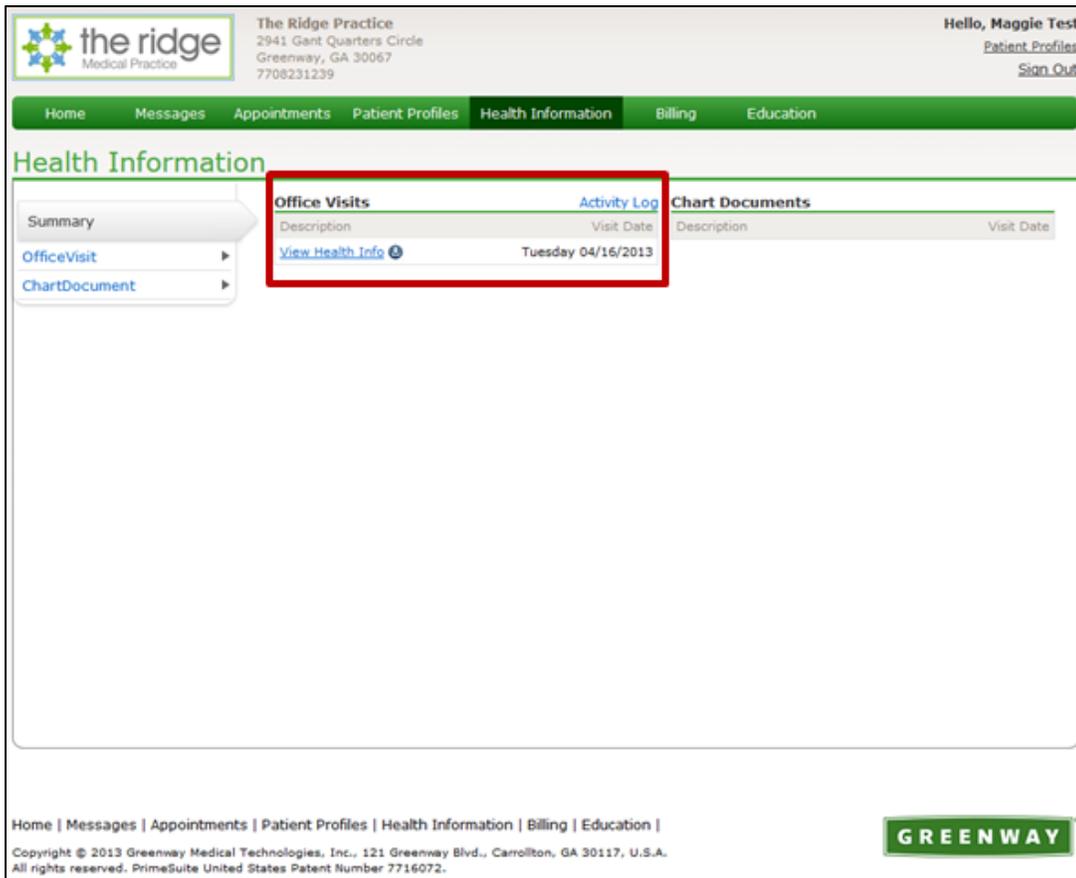
### View My Health Information

To view a summary of my office visit:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.

- Go to the **Office Visits** section, or to the **OfficeVisit** link. The 5 most recent visits will display in the **Office Visits** section; a complete list of visits will display in the **OfficeVisit** tab (the section on the left side of the page).
- Click the **View Health Info** link for the date of the visit you want to view.

Office Visits Section:



The screenshot shows the PrimePATIENT interface for 'the ridge Medical Practice'. The user is logged in as 'Maggie Test'. The 'Health Information' section is active, and the 'Office Visits' tab is selected and highlighted with a red box. A table displays the following visit:

Description	Visit Date	Description	Visit Date
<a href="#">View Health Info</a>	Tuesday 04/16/2013		

Office Visit Tab:



The screenshot shows the PrimePATIENT interface for 'the ridge Medical Practice'. The user is logged in as 'patient test'. The 'Health Information' section is active, and the 'Office Visit' tab is selected and highlighted with a red box. A table displays the following visit:

Description	Visit Date	Description	Visit Date
<a href="#">Visit Summary</a>	Thursday 06/20/2013		

- Your **Office Visits Summary** will appear in another tab or window.

## Cumulative Medical Summary:

The complete medical summary is called an ambulatory summary or C-CDA. The fields included in this document are Demographics and Care Team information, Encounter Information, Medication Allergies, Medication List, Problems, Procedures, Vitals, Laboratory Values/Results, Care Plan Goals and Instructions, Social History, Immunizations, Encounter Diagnosis, Cognitive and Functional Status, and Referral information.

To view a complete medical summary of all office visits:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.
3. Go to the **Office Visits** section
4. Click on the **Medical Summary** link.

The screenshot displays the PrimePATIENT patient portal interface. At the top, the user is logged in as 'John Smith' and can access 'Account Preferences' and 'Sign Out' options. The navigation bar includes 'Home', 'Messages', 'Appointments', 'Patient Profiles', 'Health Information', 'Billing', and 'Education'. The 'Health Information' section is active, showing a sidebar with 'Summary', 'Office Visit', and 'Chart Document'. The main content area is divided into 'Office Visits', 'Medical Summary' (highlighted with a red box), and 'Activity Log'. The 'Office Visits' table lists two visits: 'Visit Summary' on Wednesday 10/30/2013 and 'Visit Summary' on Tuesday 10/30/2012. The 'Chart Documents' section shows a 'View Document' link for the Wednesday 10/30/2013 visit. The footer contains copyright information for Greenway Medical Technologies, Inc. and the Greenway logo.

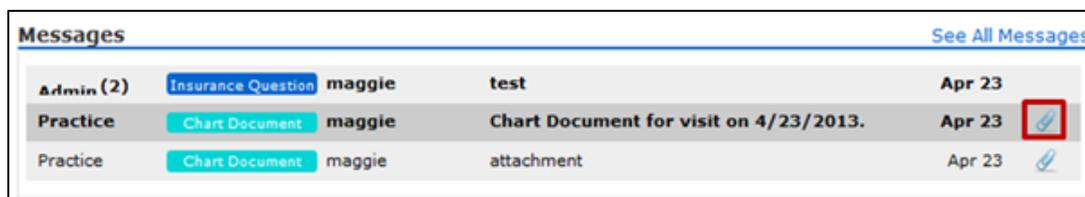
5. The complete medical summary will open in a new tab.

## View My Chart Documents

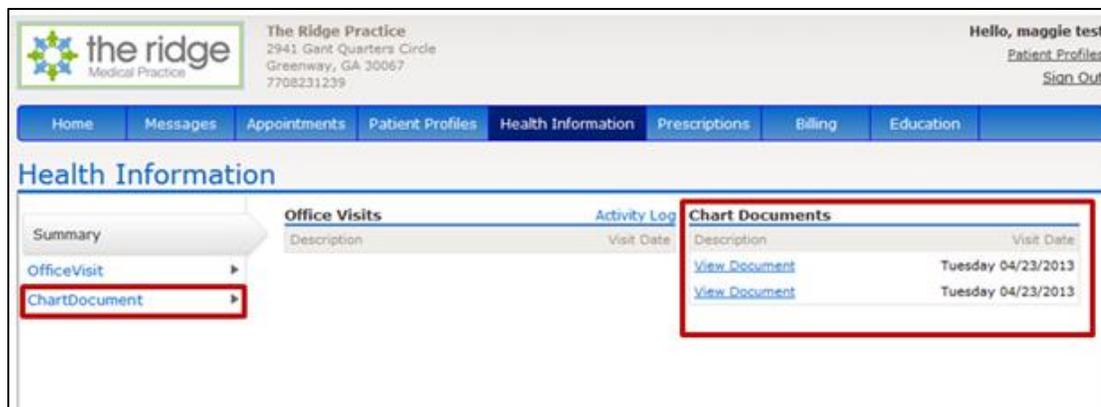
Chart Documents have to be sent from the office in a message. Once the message is sent, the chart documents can be viewed by clicking the attachment to the message or by go to the Health Information tab.

To view a document from my office visit:

1. **Login** to the portal.
2. Chart documents can be accessed in three places: on the **Homepage** in the message section, on the **Messages** tab in a message, and on the **Health Information** tab in the Chart Documents section.
  - a. On the **Homepage** or **Messages** tab, click on the paperclip in the message title, or open the message and click on the paperclip.



- b. On the **Health Information** tab, click the **View Document** link for the date of the visit you want to view.



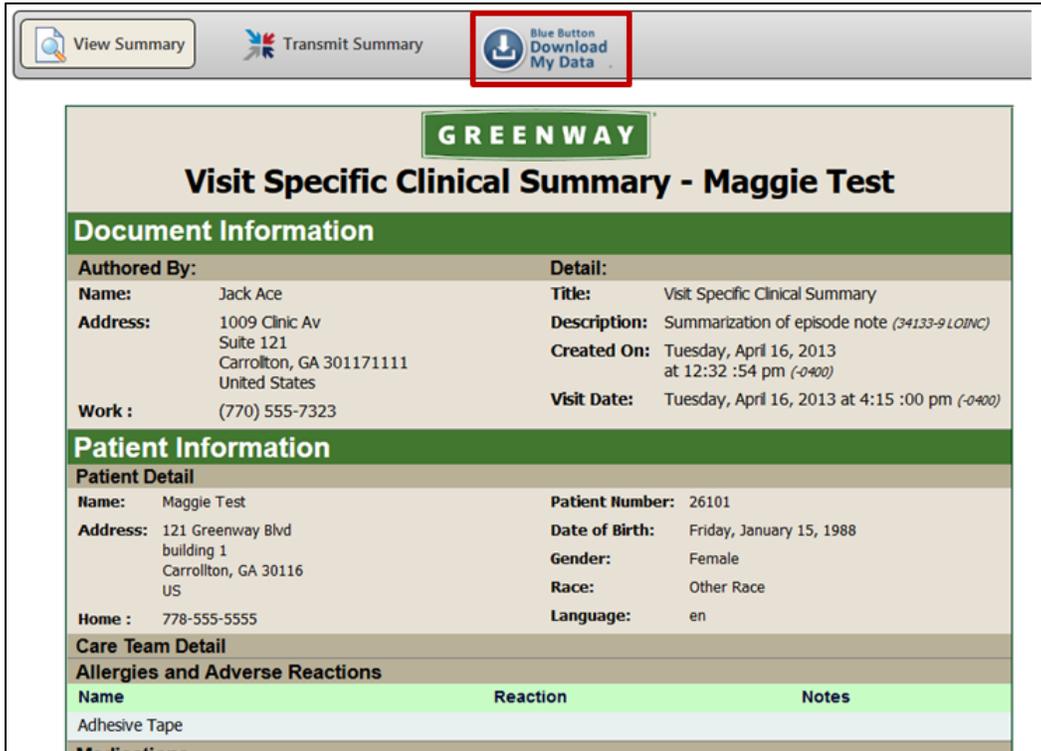
3. Your **Chart Document** will appear in another tab or window.

### Download My Health Information through VDT

To download a summary of my office visit from the **OfficeVisit** link:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.
3. Go to the **Office Visits** section, or to the **OfficeVisit** link.

4. Click the **View Health Info** link for the date of the visit you want to download.
5. Your **Office Visits Summary** will appear.
6. Click the Blue Button Download My Data icon located in the top right hand corner.



7. Click the **I Accept** button, to acknowledge you understand that by downloading and saving a copy of your clinical summary, you are now responsible for protecting your health information from others.



8. If you do not agree, click the **I Decline** button and the file will not be downloaded.

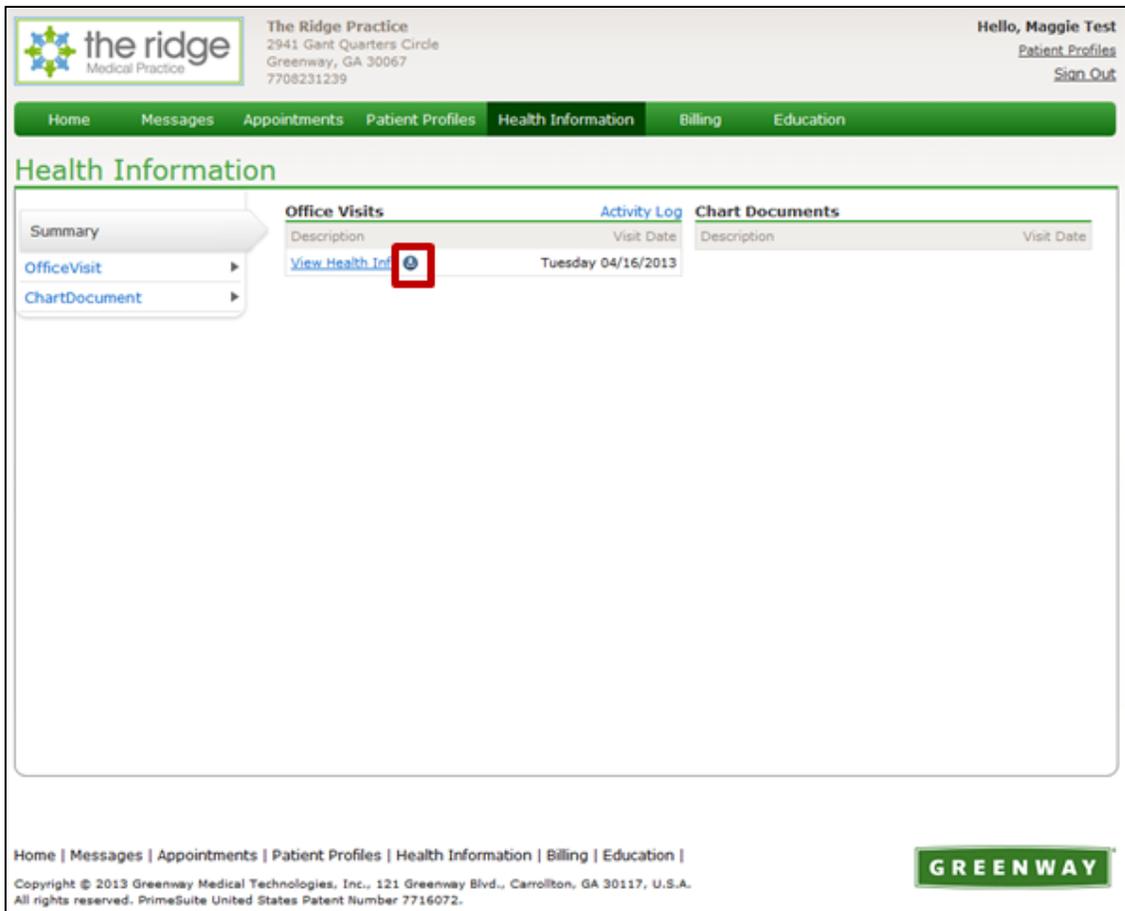
9. Select the button next to Download Text to download the file as a text file, or select the button next to Download Data to download the file as an .xml file. In most cases, the .xml file download will be the best option.
10. The file should now download to your local computer.

## Download My Health Information on the Health Information Tab

To download a summary of my office visit from Blue Button on the Health Information tab:

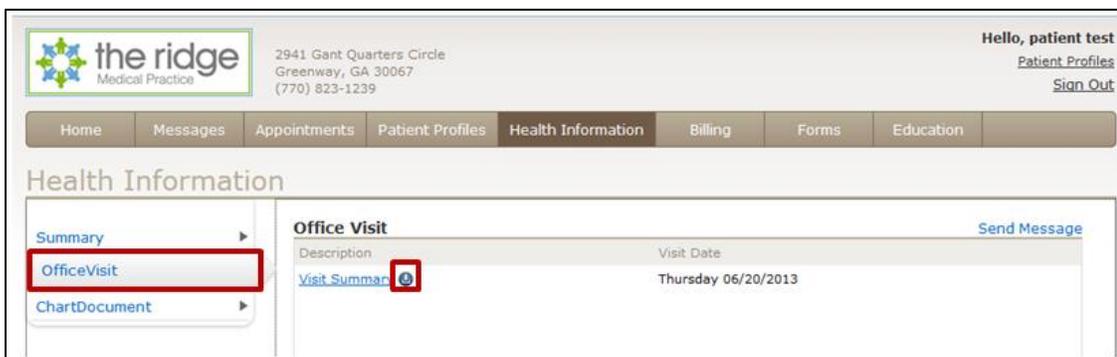
1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.
3. Go to the **Office Visits** section, or to the **OfficeVisit** link.
4. Click the **Blue Button** for the date of the visit you want to download.

Office Visits Section:



The screenshot displays the PrimePATIENT patient portal interface. At the top, the 'the ridge Medical Practice' logo is on the left, and the user's name 'Hello, Maggie Test' with 'Patient Profiles' and 'Sign Out' links is on the right. A green navigation bar contains links for Home, Messages, Appointments, Patient Profiles, Health Information (selected), Billing, and Education. Below the navigation bar, the 'Health Information' section is active, showing a 'Summary' dropdown menu with 'OfficeVisit' and 'ChartDocument' options. The 'Office Visits' table has columns for 'Description' and 'Visit Date'. A single entry is shown: 'View Health Inf' with a download icon (a blue circle with a white 'd') highlighted by a red square, and the date 'Tuesday 04/16/2013'. The 'Chart Documents' section is also visible but empty. At the bottom, there is a footer with navigation links, copyright information for Greenway Medical Technologies, Inc., and the Greenway logo.

Office Visit Tab:



5. Click the **I Accept** button, to acknowledge you understand that by downloading and saving a copy of your clinical summary, you are now responsible for protecting your health information from others.



6. If you do not agree, click the **I Decline** button and the file will not be downloaded.
7. Select the Text button to download the file as a text file. In the future there will be a choice to choose text or xml but currently only the text is available.
8. The file should now download to your local computer.

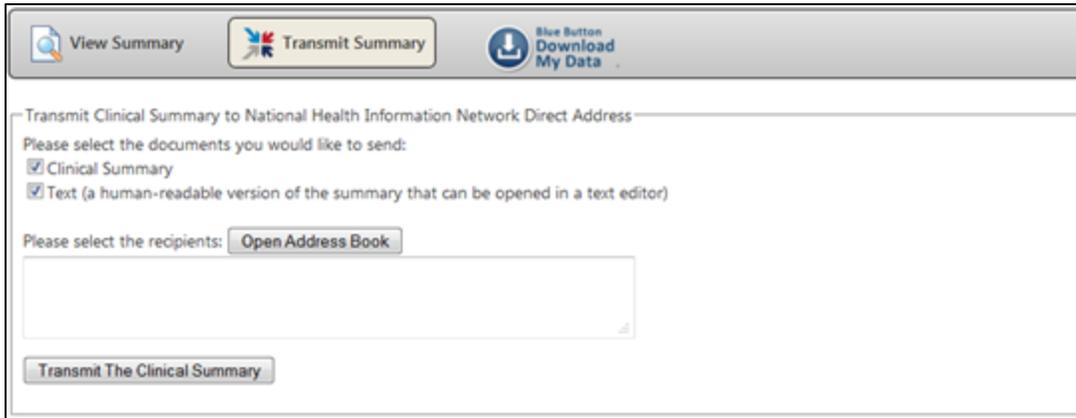
### Transmit My Health Information

You have the ability to send your clinical summary to a provider or a personal health management account such as Healthvault.

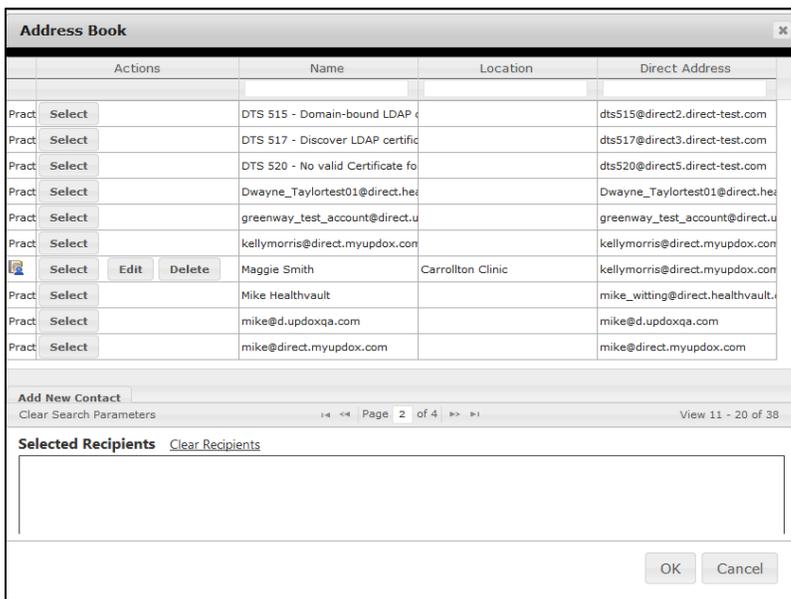
To send a clinical summary:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.

3. Go to the **Office Visits** section, or to the **OfficeVisit** link. The 5 most recent visits will display in the **Office Visits** section; a complete list of visits will display in the **OfficeVisit** tab (the section on the left side of the page).
4. Click the **View Health Info** link for the date of the visit you want to view.
5. Click the **Transmit Summary** tab.

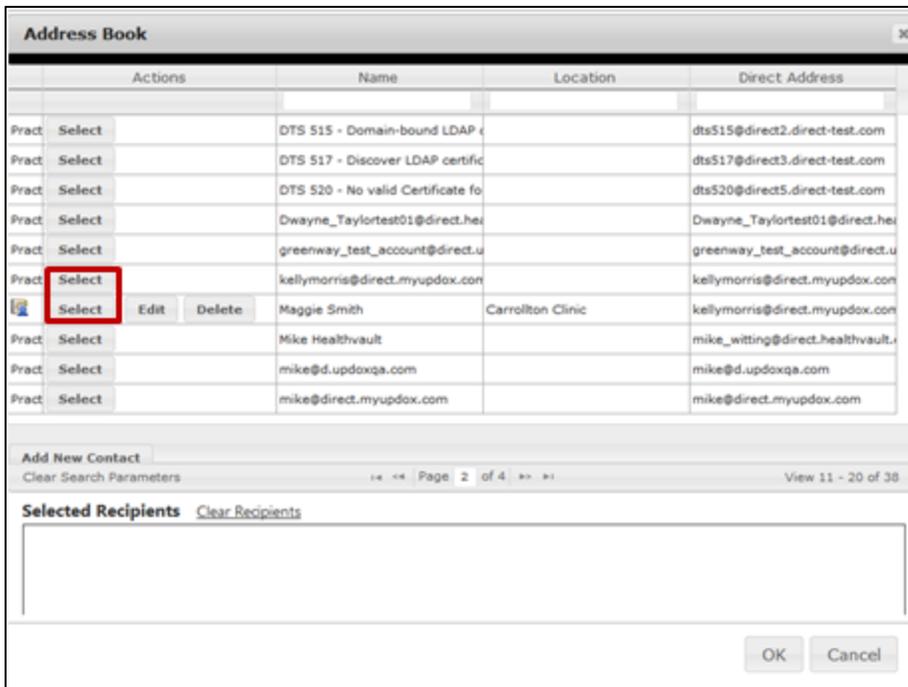


6. Select if you want to transmit a text version of the clinical summary, **xml** version of the clinical summary, or **both**.
7. Click the **Open Address Book** button to open the address book and select the recipients.

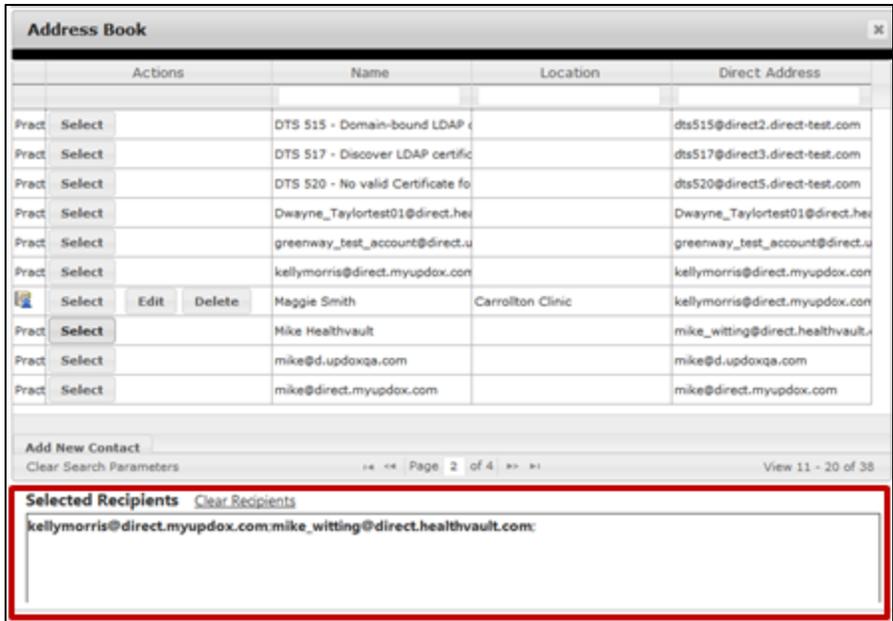


- a. The first column designates whether the contact is a **personal contact** that the patient added or a **global contact** that was already in the address book. There is hovertext for this field.

- b. The second column contains the Action buttons. Only **personal** contacts can be **edited** or **deleted**. **All** contacts can be **selected**.
  - c. The third, fourth, and fifth columns contain the contacts name, location, and direct address in that order.
  - d. The **Page navigation** allows users to go forward or backward one page, go to first or last page, or enter a page number to navigate the pages.
  - e. The **page** a user is on and how many pages are in the address book is displayed. There are **ten** contacts shown on each page.
8. Press **Select** to add contacts to the recipient list. There is **not** a limit to the number of recipients who can be selected.

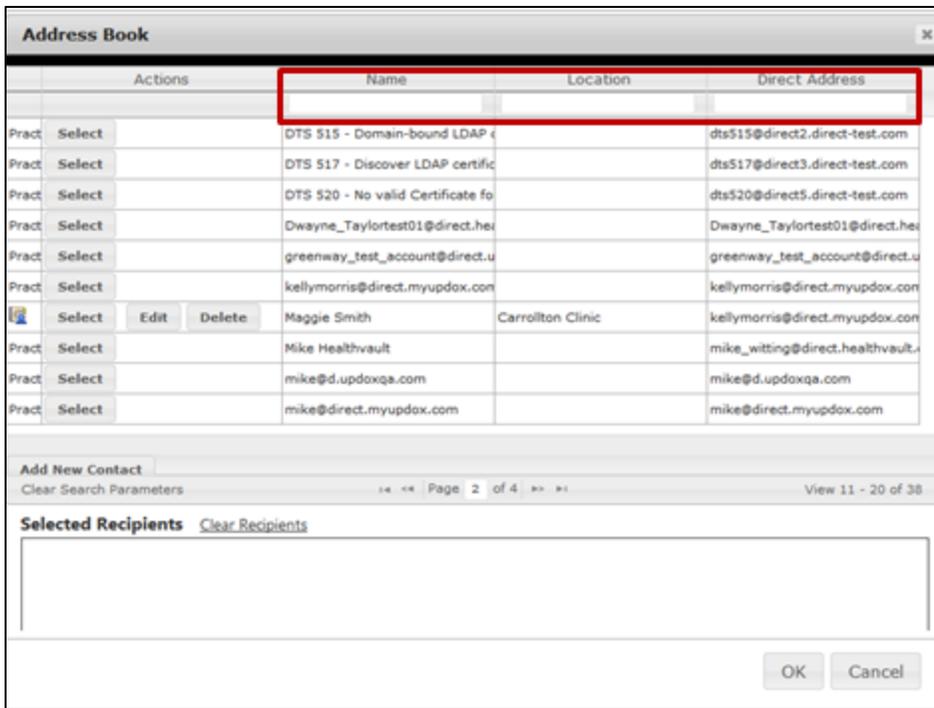


9. Contacts that are selected as recipients will appear in the Selected Recipients box.

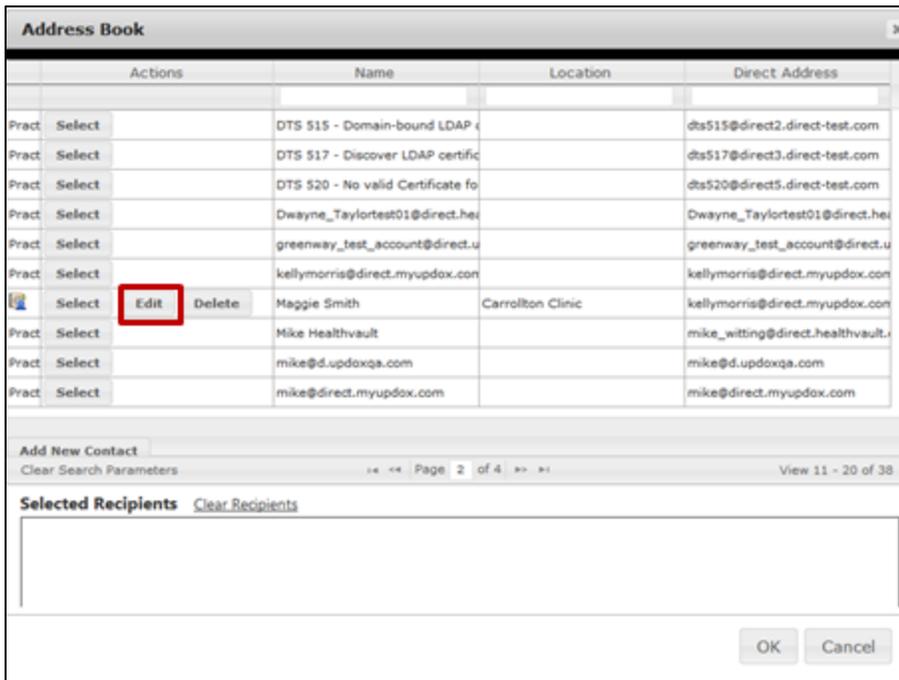


- a. To clear **one** recipient, click on the direct address.
- b. To clear **all** recipients, click on the **Clear Recipients** link.

10. Patients can search their address book by entering part of a name, location, or direct address.



- a. Available selections will begin to appear as characters are entered in the search box. The list will be filtered with each character added to the search box. For example, if mi is entered in the name box, only names that contain mi will appear in the list.
  - b. As additional characters are added in the name, location, or direct address search field, the list will be filtered by these characters. Only contacts that contain these characters in each field will be displayed in the list.
  - c. Contacts in the filtered list can be selected as recipients by clicking **Select**.
11. Click **Edit** to edit a personal contact.



The edit box will appear under the contacts list. Changes can be made to the **name**, **location**, or **direct address**. Press **Update** to save the changes or **Cancel** to undo the changes.

**Address Book**

Actions		Name	Location	Direct Address
		mi		updox
	Select Edit Delete	Maggie Smith	Carrollton Clinic	kellymorris@direct.myupdox.com
Pract	Select	mike@d.updoxqa.com		mike@d.updoxqa.com
Pract	Select	mike@direct.myupdox.com		mike@direct.myupdox.com
Pract	Select	mike@direct.updoxqa.com		mike@direct.updoxqa.com
Pract	Select	samirpatel@direct.myupdox.com		samirpatel@direct.myupdox.com

Maggie Smith    Carrollton Clinic    kellymorris@direct.myupdox.com    Update    Cancel

Clear Search Parameters    Page 1 of 4    View 1 - 5 of 38

**Selected Recipients** [Clear Recipients](#)

kellymorris@direct.myupdox.com

OK    Cancel

12. To delete a personal contact, press **Delete**.

**Address Book**

Actions		Name	Location	Direct Address
Pract	Select	DTS 515 - Domain-bound LDAP		dts515@direct2.direct-test.com
Pract	Select	DTS 517 - Discover LDAP certifi		dts517@direct3.direct-test.com
Pract	Select	DTS 520 - No valid Certificate fo		dts520@direct5.direct-test.com
Pract	Select	Dwayne_Taylorstest01@direct.he		Dwayne_Taylorstest01@direct.he
Pract	Select	greenway_test_account@direct.u		greenway_test_account@direct.u
Pract	Select	kellymorris@direct.myupdox.com		kellymorris@direct.myupdox.com
	Select Edit <b>Delete</b>	Maggie Smith	Carrollton Clinic	kellymorris@direct.myupdox.com
Pract	Select	Mike Healthvault		mike_witting@direct.healthvault.
Pract	Select	mike@d.updoxqa.com		mike@d.updoxqa.com
Pract	Select	mike@direct.myupdox.com		mike@direct.myupdox.com

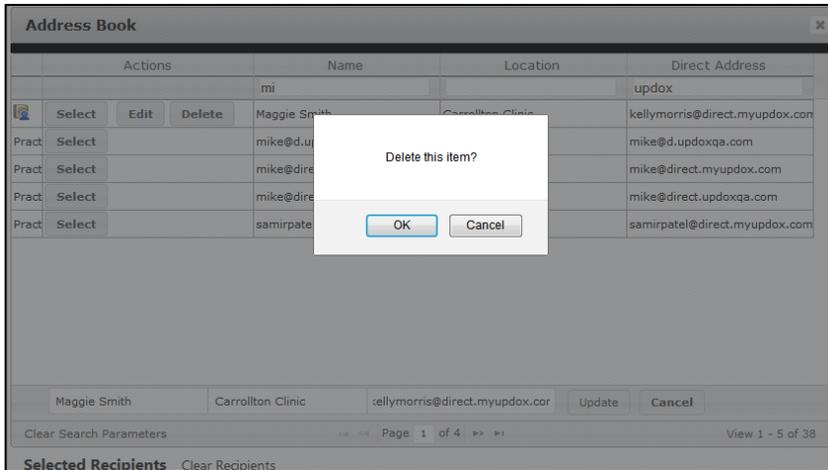
Add New Contact

Clear Search Parameters    Page 2 of 4    View 11 - 20 of 38

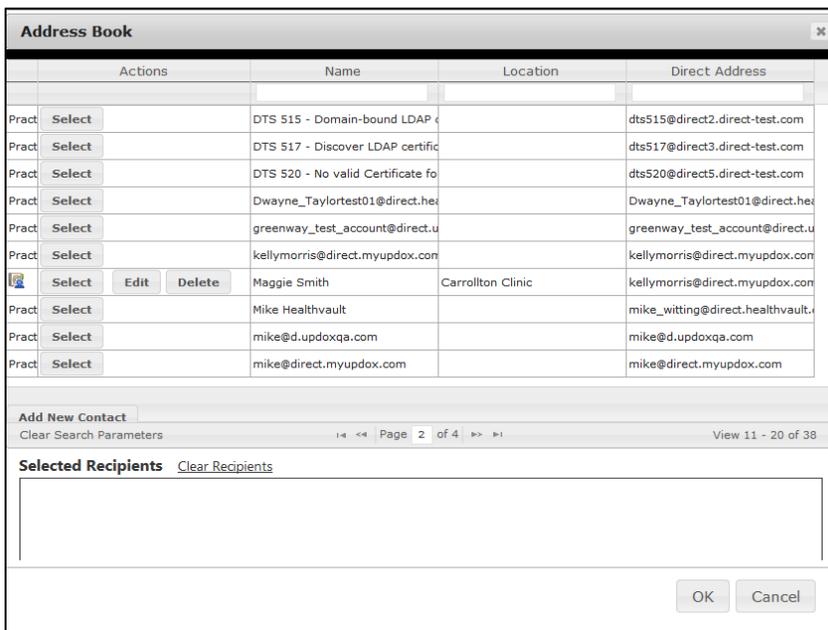
**Selected Recipients** [Clear Recipients](#)

OK    Cancel

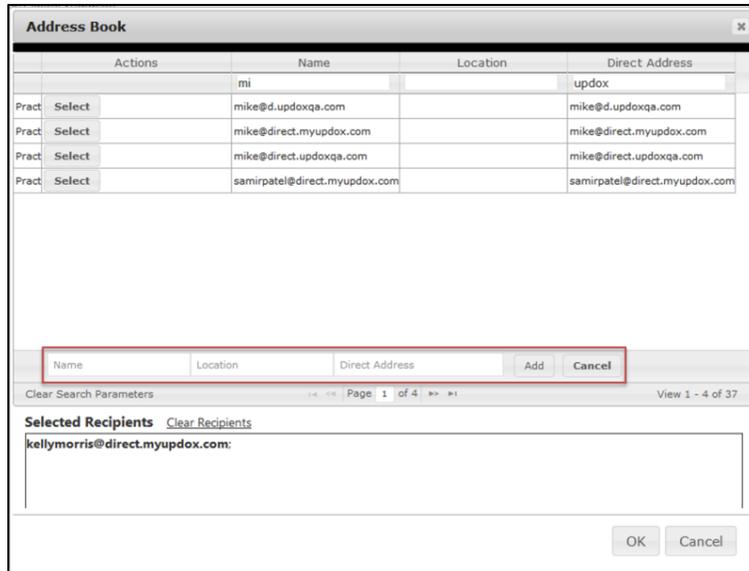
The address book will be greyed out and an action box will appear. Press **OK** to delete the contact; press **Cancel** to go back to the address book.



13. To add a new personal contact, press the **Add New Contact** button.



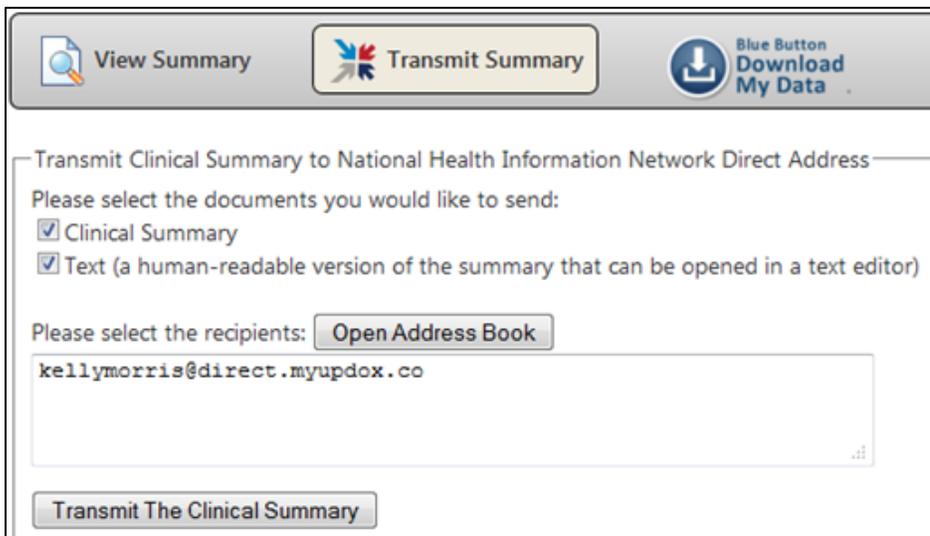
- a. Enter the contact's **name**, **location**, and **direct address**. Press **Add** to add the contact to the address book or **Cancel** to go back to the previous screen.



- b. When **Add** is selected, the direct address will be checked to verify it is a valid address. If the address is not a valid address, an error message will appear and the contact will not be saved. If the address is a valid address, the contact will be saved.

14. Select **OK** to select the recipients.

15. The recipients will be listed in the text box on the transmit page.



16. Click **Transmit the Clinical Summary** to send the summary to the selected recipients.

17. A success message will appear if the summary was transmitted successfully.

### View Activity Log

The Activity Log specifies when your Health Information was accessed and by whom it was accessed.

To view the activity log:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.
3. Under to the **Office Visits** section, click the **Activity Log** link.

The screenshot displays the PrimePATIENT patient portal interface. At the top, the header includes the 'the ridge' logo, practice address (2941 Gant Quarters Circle, Greenway, GA 30067, 7708231239), and user information for 'Maggie Test' with links for 'Patient Profiles' and 'Sign Out'. A green navigation bar contains tabs for 'Home', 'Messages', 'Appointments', 'Patient Profiles', 'Health Information', 'Billing', and 'Education'. The 'Health Information' section is active, showing a sidebar with 'Summary', 'OfficeVisit', and 'ChartDocument'. The main content area has three tabs: 'Office Visits', 'Activity Log' (highlighted with a red box), and 'Chart Documents'. Below the 'Office Visits' tab, a table lists a visit on 'Tuesday 04/16/2013' with a 'View Health Info' link. The footer contains navigation links, copyright information for Greenway Medical Technologies, Inc. (© 2013), and the 'GREENWAY' logo.

4. The activity log will open. The activity log should be a cumulative list of all health information link items. The log should list who accessed the CCD, the date the CCD was accessed, and the activity (view or download).

<b>GREENWAY</b>			
<b>Activity History</b>			
<b>Patient: boots boots</b>			
Action (Access Type)	Document	Date and Time of Action	Performed By
Viewed	Visit on 7/31/2013 9:44:36 AM	8/14/2013 5:15:22 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/14/2013 5:17:24 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/20/2013 3:00:53 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/20/2013 3:09:43 PM	boots boots
Viewed	Visit on 7/20/2012 3:34:55 PM	8/20/2013 3:09:49 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/20/2013 3:09:52 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/20/2013 3:09:56 PM	boots boots
Viewed	Visit on 7/20/2012 3:34:55 PM	8/26/2013 12:48:54 PM	boots boots
Viewed	Visit on 7/20/2012 3:34:55 PM	8/26/2013 3:59:32 PM	boots boots
Viewed	Visit on 7/20/2012 3:34:55 PM	8/27/2013 11:59:51 AM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/28/2013 1:37:23 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/28/2013 10:39:59 PM	boots boots
Viewed	Visit on 7/31/2013 9:44:36 AM	8/29/2013 9:39:16 AM	boots boots
Viewed	Visit on 7/20/2012 3:34:55 PM	8/29/2013 9:39:42 AM	boots boots

Accessed: 2:04:58 PM

**Note:** Whichever patient is selected in the patient picker is whose activity log you will be viewing.

### Send a Health Information Message to Medical Staff

There is a link to send a message to the doctor’s office on the Health Information tab. If you have questions about your Health Summary while viewing your Health Summary, click this link to easily send a question to your doctor’s office.

To send a Health Information Message to the Doctor from the Health Information tab:

1. **Login** to the portal.
2. Click the **Health Information** tab on the navigation bar.
3. Go to the **OfficeVisit** link on the left side of the page.

The screenshot displays the PrimePATIENT Patient User Guide interface for 'the ridge Medical Practice'. The header includes the practice name, address (2941 Gant Quarters Circle, Greenway, GA 30067, 7708231239), and a personalized greeting 'Hello, Maggie Test' with links for 'Patient Profiles' and 'Sign Out'. A green navigation bar contains links for Home, Messages, Appointments, Patient Profiles, Health Information (selected), Billing, and Education. The main content area is titled 'Health Information' and features a left-hand navigation menu with 'Summary', 'OfficeVisit' (highlighted with a red box), and 'ChartDocument'. The 'Office Visits' section contains a table with columns for Description, Visit Date, and a 'View Health Info' link. A single entry is shown with the date 'Tuesday 04/16/2013'. The 'Chart Documents' section is currently empty. The footer includes a navigation bar, copyright information for Greenway Medical Technologies, Inc. (© 2013), and a 'GREENWAY' logo.

4. Click the **Send Message** link.

The Ridge Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
7708231239

Hello, Maggie Test  
[Patient Profiles](#)  
[Sign Out](#)

Home Messages Appointments Patient Profiles Health Information Billing Education

### Health Information

Summary ▶  
OfficeVisit ▶  
ChartDocument ▶

Description	Visit Date
<a href="#">View Health Info</a>	Tuesday 04/16/2013

[Send Message](#)

Home | Messages | Appointments | Patient Profiles | Health Information | Billing | Education |

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All rights reserved. PrimeSuite United States Patent Number 7716072.

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5. Follow the directions from step 8 in the section titled "Send A Message to Practice Staff" to send the message.

## **Billing**

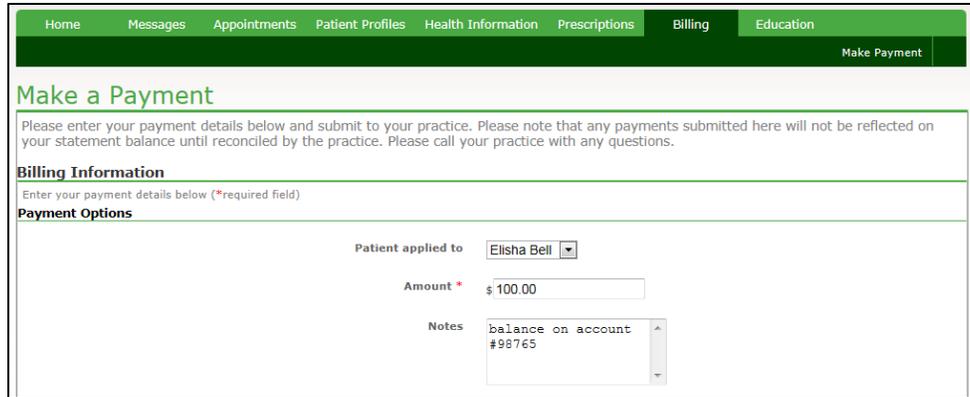
Your doctor's office may allow you to make a payment online through the Patient Portal. If your doctor's office uses this feature, you will be able to make a single payment using a debit or credit card.

### **Make a Payment**

To make a one-time payment using your debit card or credit card:

1. **Login** to the portal.
2. Click the **Billing** tab on the navigation bar.
3. Enter your **Payment** information:
  - a. Select the **Patient** from the dropdown box for whom the payment is for.

- b. Enter the **Amount** of your payment.
- c. Enter any additional information that may be useful for the practice. For example, you could enter your account number.



The screenshot shows the 'Make a Payment' page in the PrimePATIENT system. The navigation bar at the top includes Home, Messages, Appointments, Patient Profiles, Health Information, Prescriptions, Billing, and Education. A 'Make Payment' button is located in the top right corner. The main heading is 'Make a Payment'. Below the heading, there is a disclaimer: 'Please enter your payment details below and submit to your practice. Please note that any payments submitted here will not be reflected on your statement balance until reconciled by the practice. Please call your practice with any questions.' The form is divided into two sections: 'Billing Information' and 'Payment Options'. Under 'Billing Information', there is a prompt: 'Enter your payment details below (\*required field)'. Under 'Payment Options', there are three fields: 'Patient applied to' with a dropdown menu showing 'Elisha Bell', 'Amount \*' with a text input field containing '\$ 100.00', and 'Notes' with a text area containing 'balance on account #98765'.

4. Enter your **Credit Card** information.
  - a. Enter your **First Name**.
  - b. Enter your **Last Name**.
  - c. Enter your **Credit Card Number**.
  - d. Select the **Expiration Date**: Month and Year.
  - e. Enter your 3 digit **Security Code** on the back of your card.
5. Enter your **Billing Address** information.
  - a. Enter your **Street Address**.
  - b. Enter your **City**.
  - c. Select the **State**.
  - d. Enter your **Zip Code**.
6. Click the **Make a Payment** button.

**Credit Card**

First Name \* Elisha

Last Name \*

Credit Card Number \* 4111111111111111

Expiration \* Month: January (01) / Year: 2010

Security Code \* 123

**Billing Address**

Street \* 121 Greenway Blvd

City \* Carrollton

State \* Georgia

Zip Code \* 30117

**Make a Payment**

- An error message will appear if any required fields are empty. The missing fields will be outlined in red.

**Billing Information**

Enter your payment details below (\*required field)

**Payment Options**

Patient applied to

Amount \* \$ 1.00

Notes

**Credit Card**

Please fill out all indicated fields

OK

Credit Card Number \* 4111111111111111

Expiration \* Month: January (01) / Year: 2010

Security Code \*

**Billing Address**

Street \*

City \*

State \* Select a State

Zip Code \*

**Make a Payment**

Home | Messages | Appointments | Patient Profiles | Health Information | Billing | Education |

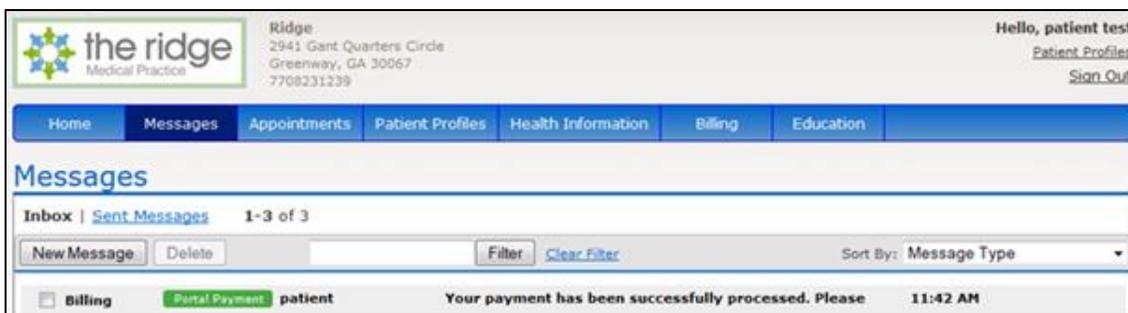
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- A wait screen will appear while the fields are being checked for errors.

- A confirmation message will appear if all of the data is valid.

- Once your payment has been authorized, you will receive a receipt in your Messages: Inbox on the Patient Portal.



## Education

You may view news and announcements from your doctor's office as well as patient education. The patient education section can provide you with valuable educational resources on a variety of health topics. Up to four education topics will be available on the home page. All of the education materials setup in portal admin should be displayed on the education tab.

### **Read News and Announcements from Your Practice**

To read practice news and announcements:

- Login** to the portal. Some news and announcement items will be seen on the home page.
- For a full list of news and announcement items, click the **Education** tab on the navigation bar.
- News and Announcements from the practice can be found in the **News and Announcements** section.
- To read the full announcement, click on the announcement.

the ridge  
Medical Practice  
2941 Gant Quarters Circle  
Greenway, GA 30067  
(770) 823-1239

Hello, maggie test  
[Patient Profiles](#)  
[Sign Out](#)

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## News

### News and Announcements

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### Patient Education

**Las muelas del juicio: descripción**  
[Read More](#)

**Understanding Wisdom Teeth**  
[Read More](#)

**Cómo controlar la alta presión arterial**  
[Read More](#)

**Controlling High Blood Pressure**  
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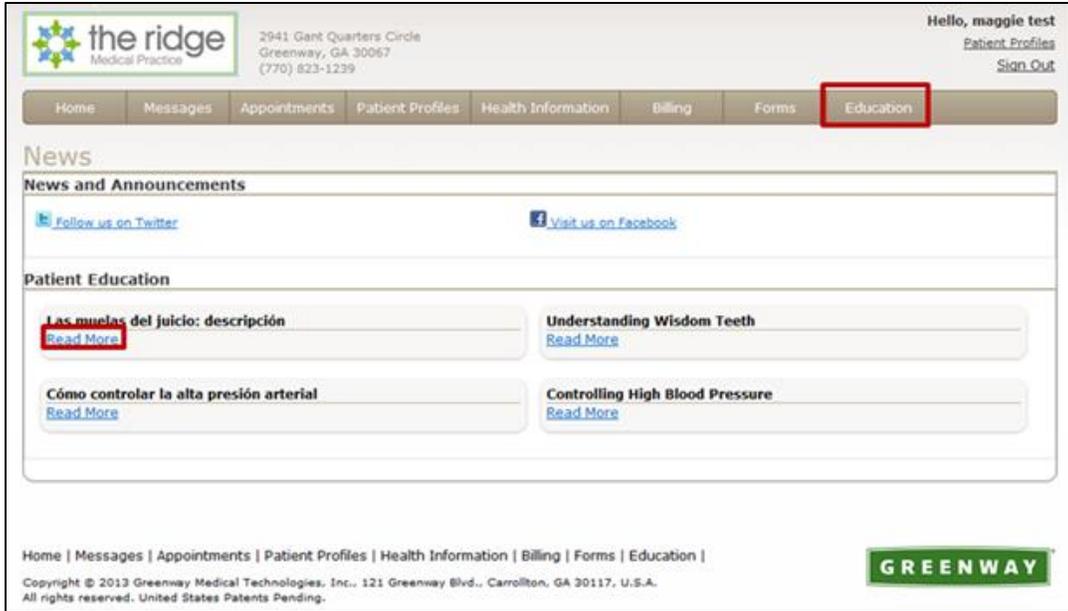
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## Read Patient Education

To read patient health education:

1. **Login** to the portal.
2. Click the **Education** tab on the navigation bar.
3. Health news from the practice can be found in the **Patient Education** section.
4. To read the health article, click the **Read More** link under the title of the article you want to view.



5. The full article will now display.

