

USER GUIDE :
PATIENT PORTAL

MEDFAR
SOLUTIONS CLINIQUES



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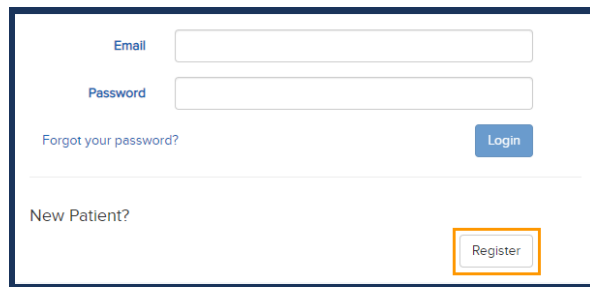
Accessing the Patient Portal

The patient portal is a tool meant to help schedule your medical appointments and provide your clinic with an effective communication channel. Ask your clinic how to access their portal as not every clinic links their patient portal to their website.

Creating an Account From the Patient Portal

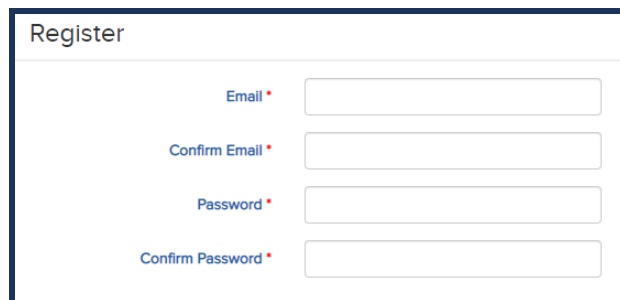
To create an account in your clinic's patient portal, follow the steps below:

1. Click *Register* under the *New Patient?* section.



The screenshot shows a login/register interface. At the top, there are two input fields labeled 'Email' and 'Password'. Below the 'Password' field is a link that says 'Forgot your password?'. To the right of this link is a blue 'Login' button. Below these elements is a horizontal line, and then the text 'New Patient?'. Underneath 'New Patient?' is a 'Register' button, which is highlighted with a red rectangular box.

2. Fill out the fields displayed on the page.
 - Fields with a red asterisk are mandatory and can vary depending on the clinic.
 - a. Enter your email address and confirm it.
 - You must have an email address to create a portal account. It is not allowed to create more than one portal account with the same email address.
 - b. Create your password and confirm it.



The screenshot shows a 'Register' form. The title 'Register' is at the top left. Below it are four input fields, each with a red asterisk next to its label: 'Email *', 'Confirm Email *', 'Password *', and 'Confirm Password *'. The fields are arranged vertically.

- The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).

- c. Fill out the personal information fields.

- o It is impossible to create an account for a person younger than 14 years old. To use the portal for a child, you must first create an account for the parent or tutor. You can then ask the clinic to add the child’s profile to the parent’s account. You will then have one account with 2 profiles.

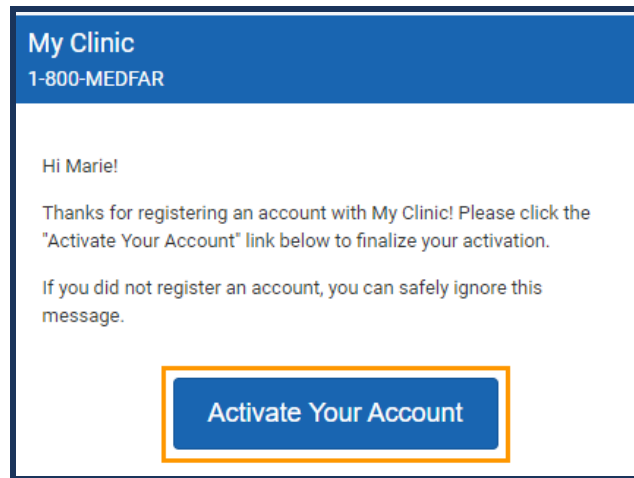
- d. Add a phone number where you are easily reachable.

- i. Click the drop-down list on the right side to specify the type of phone you are adding.

- e. Click *Register* when you have filled in all the required information.

- o If the option is unclickable, it means that at least one field is empty or incorrectly filled.

3. Activate your portal account by opening the message sent to the email address used to create the account. Click *Activate Your Account*.

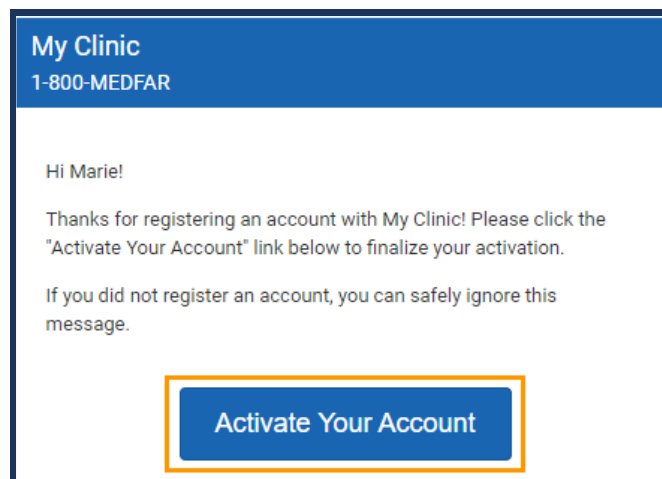


- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
4. Read the patient portal's *Terms and Conditions* and click *I have read, understood and accepted the Terms and Conditions* at the bottom of the page.


Creating an Account From the Clinic's Invitation

To create an account using the clinic's invitation, follow the steps below:

1. Connect to your email inbox, open the message received from your clinic and click *Activate your account*.



- You are redirected to the patient portal's login page.
 - The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
2. Fill out the required fields.
- a. Enter the code given to you by the clinic.
 - The code given by the clinic is valid for a 24 to 72-hour period. If you try to activate your account past this time limit, the code will have expired. You will have to contact the clinic so they can provide you with a new invitation and a new code.
 - b. Create your password and confirm it.
 - The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
 - c. Click *Submit* once all the boxes are filled out.



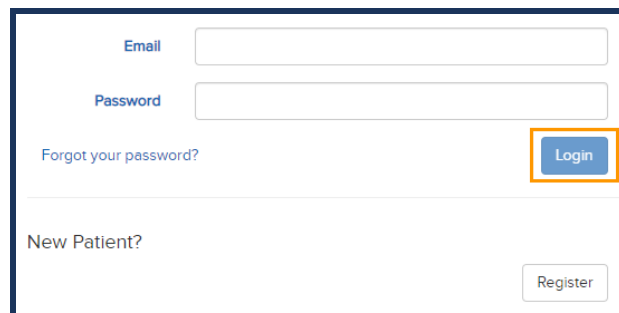
The screenshot shows a registration form with four input fields and a submit button. The fields are labeled 'Email', 'Clinic Code', 'Password', and 'Confirm Password'. The 'Email' field contains 'marie@courrieltest.com', and the 'Clinic Code' field contains 'RYkhy3'. The 'Password' and 'Confirm Password' fields are filled with dots. A blue 'Submit' button is located at the bottom right of the form.

3. Read the patient portal's *Terms and Conditions* and click *I have read, understood and accepted the Terms and Conditions* at the bottom of the page.

Log Into Your Portal Account

To log into your portal account, you must use the email address and password used while registering. To do so, follow the steps below:

1. Enter your email address.
2. Enter your password.
3. Click *Login*.

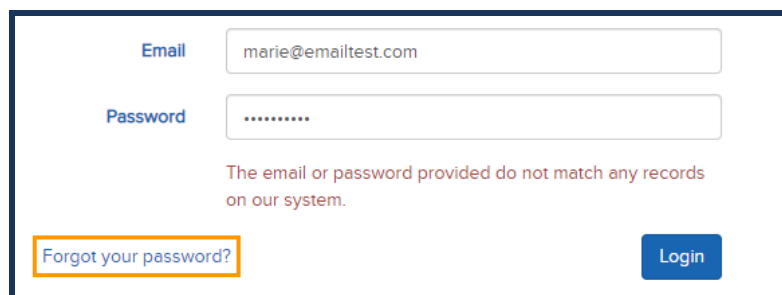


The screenshot shows a login form with the following elements: an 'Email' input field, a 'Password' input field, a 'Forgot your password?' link, a blue 'Login' button, and a 'New Patient?' section with a 'Register' button.

Resetting a Forgotten Password

If you get an error message when trying to log in, it is possible that the email address or password entered are incorrect. If, however, you have forgotten your password, you can reset it from the patient portal's login page. To reset your password, follow the steps below:

1. Check that the email address is correctly entered in the *Email* field.
 - If you have more than one email address, make sure you are using the one registered to your portal account.
2. Click *Forgot your password?*



The screenshot shows the login form with the email field filled with 'marie@emailtest.com' and the password field masked with dots. A red error message reads: 'The email or password provided do not match any records on our system.' The 'Forgot your password?' link and the 'Login' button are visible.

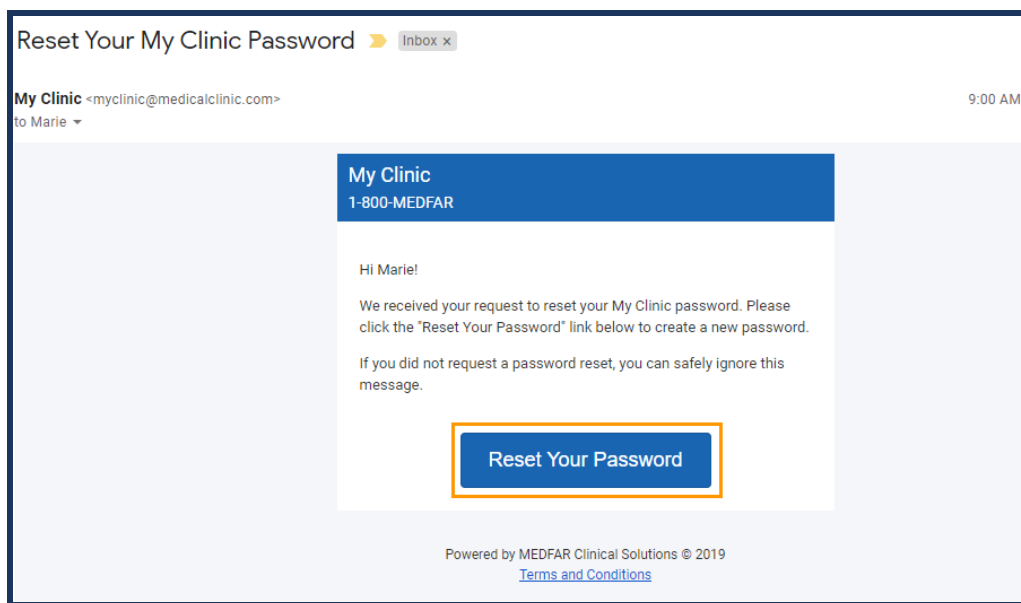
3. Enter the email address used to create your account in the designated field and click *Reset Password*.

Please enter the email used to register your account

Email

Reset Password

- A message will let you know an email was sent with a recovery link.
4. Connect to your email inbox, open the message from your clinic and click *Reset Your Password*.



- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
 - You are redirected to a recovery login page.
5. Create a new password, confirm it and click *Submit*.

Email

Password

Confirm Password

Submit

- The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
- You can now browse through your portal account.

Managing Your Portal Account

Clinics offer multiple services available on their online patient portal.

Browsing Your Portal Account

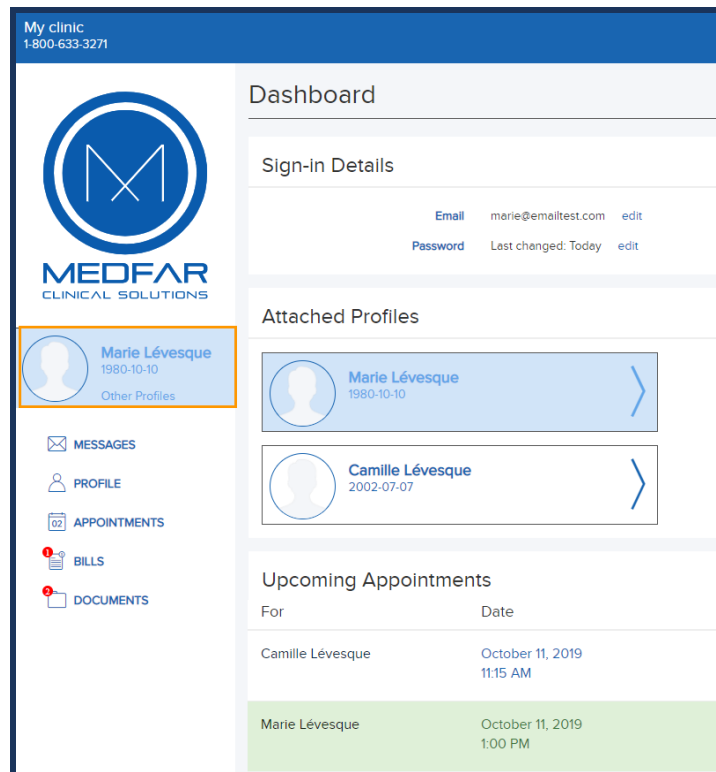
Your portal account is divided into 4 sections; the header menu at the top, the navigation tabs on the left sidebar, all the recent activity on the right-hand side and the content in the center of the page.

- The header menu features information related to your portal account.
 - The clinic's name and contact information.
 - The language settings and logout option.
- The left side menu contains all the navigation tabs to your portal account.
 - The name and information of the currently selected profile gives access to the dashboard.
 - All the tabs giving you access to the clinic's different services.
- The recent activity section displays a chronological timeline of the last few actions related to the current profile.
 - The recent activity lines are clickable so you can be easily redirected to a specific action. This section can be used to navigate quickly within the portal account.
- The content at the center of the page discloses all the information related to the selected tab.

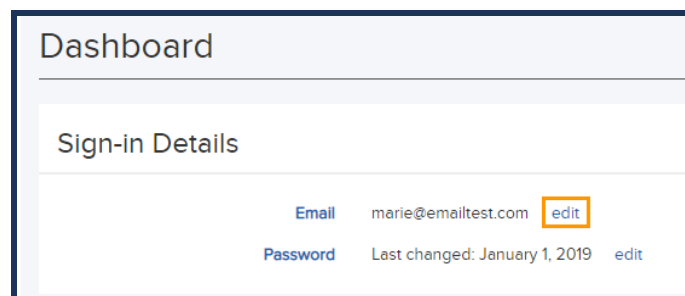
Accessing Your Dashboard

The dashboard is the landing page of your portal account. From this page, you can manage your login settings, your future appointments and the different profiles linked to your account, if applicable. To learn how to use the *Dashboard*, follow the steps below:

1. Click on your name in the margin on the left side of the page to get to the dashboard.

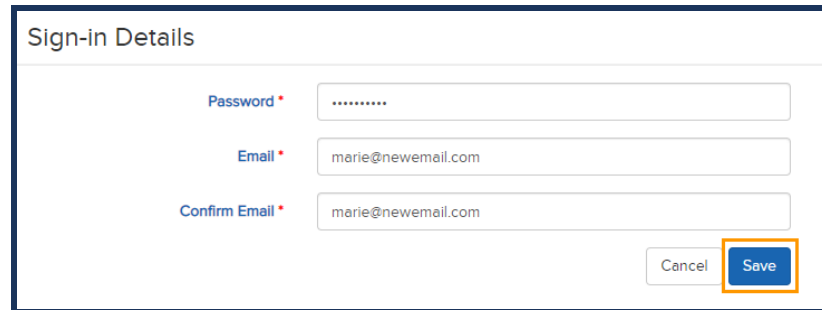


2. Select *edit* on the right side of your email address if you wish to change the login email address of your portal account.



- You will not be able to change the email address to one that is already registered to another portal account.

- a. Enter your password in the required field to confirm you are the account owner.
- b. Enter the new email address and confirm it.
- c. Click *Save* to apply the modification.

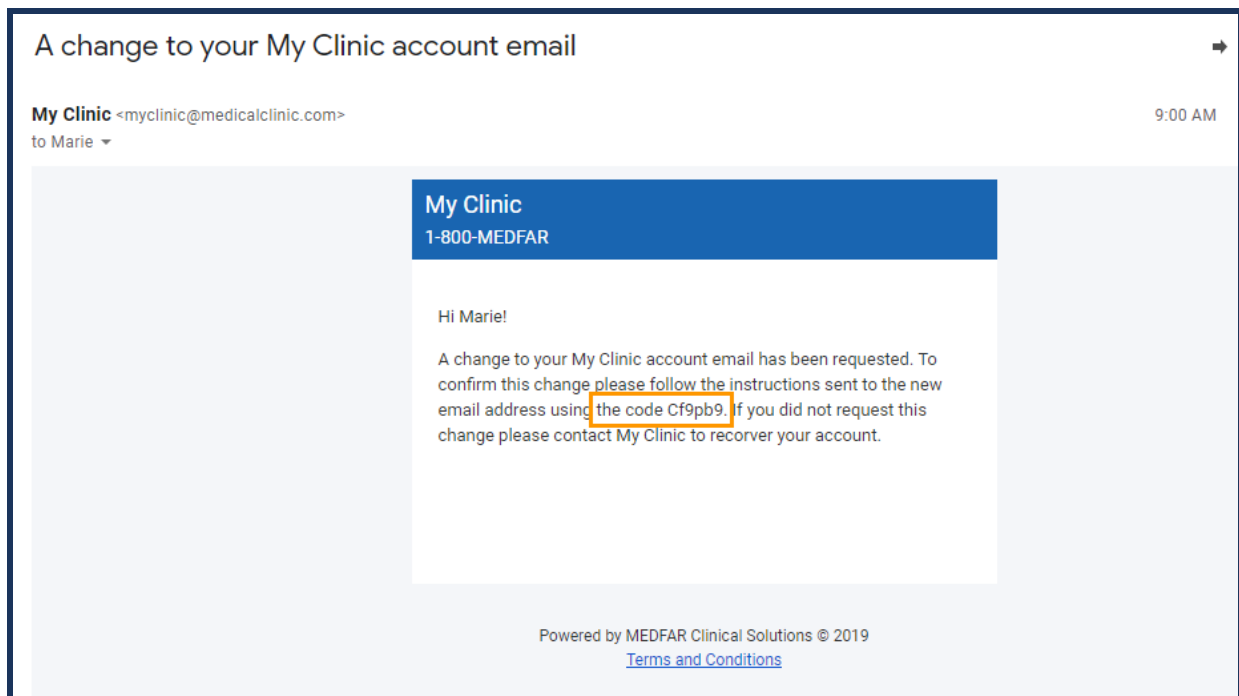


Sign-in Details

Password *
Email * marie@newemail.com
Confirm Email * marie@newemail.com

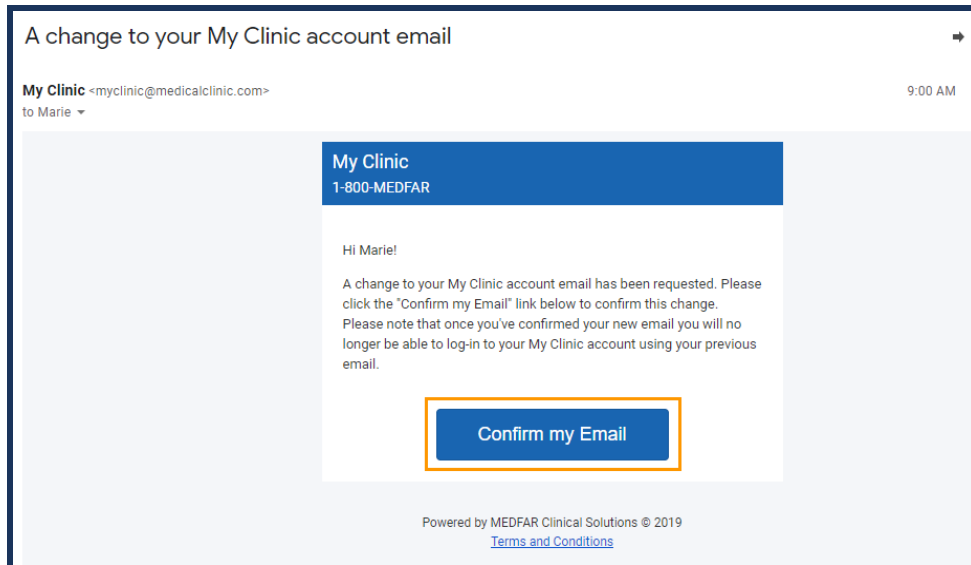
Cancel Save

- d. Select *Done* from the pop-up window.
- e. A message is sent to your old email address with an activation code.



- f. A message is sent to your new email address with a link to access the confirmation page.

- i. Click on the link to be redirected to the confirmation page.



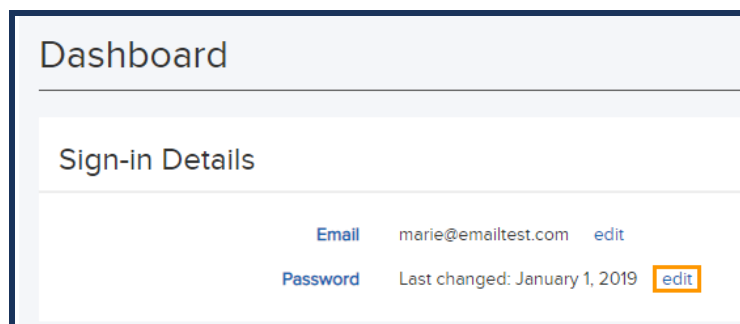
- o The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.

- g. Enter the code provided in the *Clinic Code* field.
- h. Click *Submit* to access your portal account.

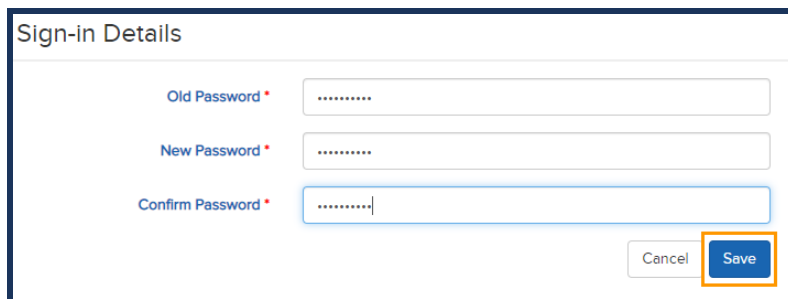
Email

Clinic Code

- 3. Select *edit* on the right side of the password section if you wish to change your current password.



- To change your password from this section you must know your current one. If you do not remember your current password, use the *Forgot your password?* on the login page.
- a. Enter your current password in *Old Password*.
- b. Enter your new password and confirm it.
 - The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
- c. Click *Save* to apply the modification.

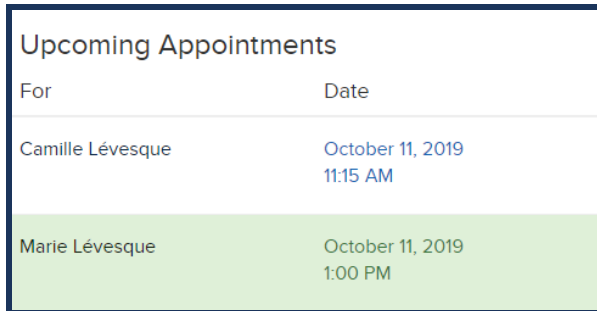


- d. Select *Done* from the pop-up window.
4. Select a profile to take actions under it. If no other profiles are linked to your account, your profile will be selected by default.



- The selected profile will turn blue and its name will appear on the left sidebar.

5. Use the *Upcoming Appointments* section to have a quick view of the next appointments for all the profiles linked to your account.



Upcoming Appointments	
For	Date
Camille Lévesque	October 11, 2019 11:15 AM
Marie Lévesque	October 11, 2019 1:00 PM

- Your appointments can be managed from both the *Dashboard* and the *Appointments* tab. See how to do so [here](#).

Managing Multiple Profiles Within One Account

If you manage someone else's medical care, like a child or elderly person, and have a portal account under your name, you can ask the clinic to add their profile to your portal account. To learn how to manage multiple profiles, follow the steps below:

1. Communicate with your clinic to add a profile to your portal account.
 - a. Call your clinic and ask them to add the profile of the person under your care to your portal account.
 - If that person is over 14 years old, the clinic will need their approval.
 - b. Determine with the clinic which tabs are necessary to manage the profile of the person under your care: booking appointments, viewing bills, documents and messages.
2. Log into your portal account.
 - a. Click on your name in the left side menu. In the *Attached Profiles* section, you will see all the profiles to which you have access.

The screenshot displays the Medfar Patient Portal Dashboard. At the top left, it shows 'My clinic 1-800-633-3271' and the Medfar Clinical Solutions logo. The main content area is titled 'Dashboard' and includes a 'Sign-in Details' section with fields for 'Email' (marie@emailtest.com) and 'Password' (Last changed: Today). Below this is the 'Attached Profiles' section, which is highlighted with an orange box. It lists two profiles: 'Marie Lévesque' (1980-10-10) and 'Camille Lévesque' (2002-07-07). The 'Marie Lévesque' profile is selected, and its name is also visible in the left sidebar. Below the profiles is the 'Upcoming Appointments' section, which shows two appointments for 'Camille Lévesque' and 'Marie Lévesque' on October 11, 2019.

3. Select the profile for which you want to take actions.
 - Once the profile is selected, its name will appear in the left sidebar. From now on, all the actions you take will affect this profile only.

Losing Access to a Profile

Since a person younger than 14 years old is not allowed to have a portal account, a parent or guardian can add the child's profile to their own portal account. However, the day the child turns 14, the parent or guardian will lose access to the child's profile and the following message will be on the account:

The screenshot displays the 'My Clinic' dashboard for MEDFAR Clinical Solutions. The header includes the clinic name and phone number (1-800-MEDFAR). The main content area is titled 'Dashboard' and is divided into several sections:

- Sign-in Details:** Shows the user's email (marie@emailtest.com) and password last changed date (January 1), both with 'edit' links.
- Attached Profiles:** Lists profiles for Marie Lévesque (1980-10-10) and Camille Lévesque (2002-07-07). The profile for Hugo Levesque (2005-10-20) is highlighted with a red border and a red message: "This patient is passed the age of consent. You no longer have access to their file."
- Left Sidebar:** Contains the MEDFAR logo, the user's name (Marie Lévesque), birth date (1980-10-10), and a list of navigation options: MESSAGES, PROFILE, APPOINTMENTS, BILLS, and DOCUMENTS.

For the parent or the guardian to regain the access to the child's profile, they must contact the clinic directly. The child must give their approval for the parent to be granted access to his medical profile.

Managing Appointments

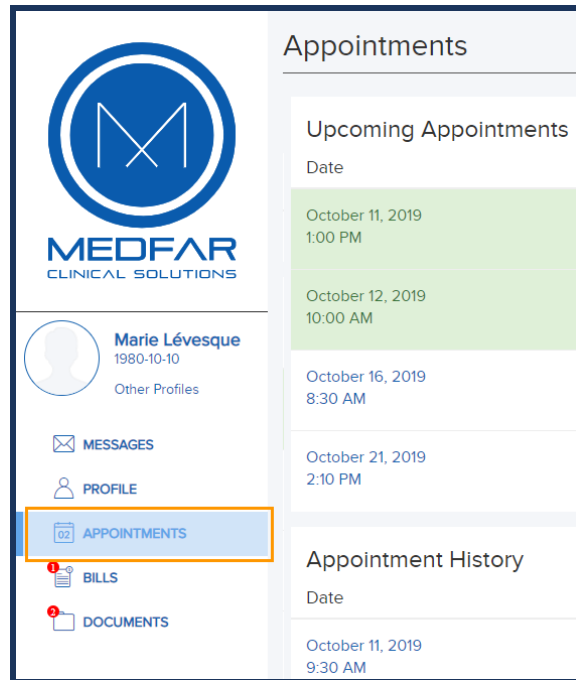
You can book, confirm and cancel appointments with your clinic's healthcare professionals directly from your portal account.

Booking an Appointment From Your Portal Account

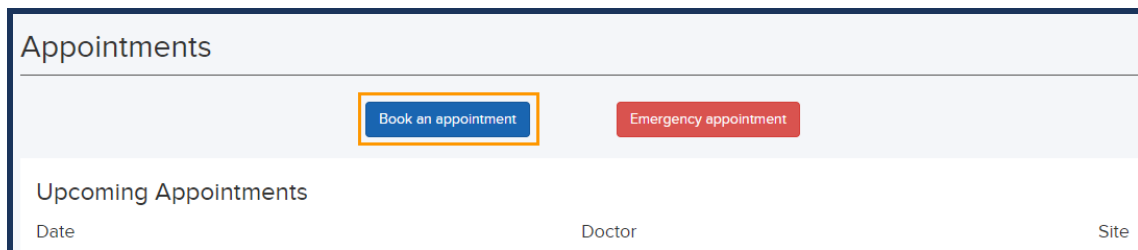
Booking an appointment online lets you view the available slots in a calendar format and makes it easier for you to compare those availabilities to your personal schedule. To book an appointment, follow the steps below:

1. Access your portal account.

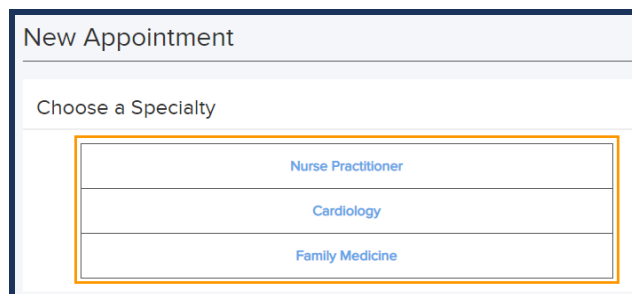
2. Click the *Appointments* tab.



3. Select *Book an appointment*.

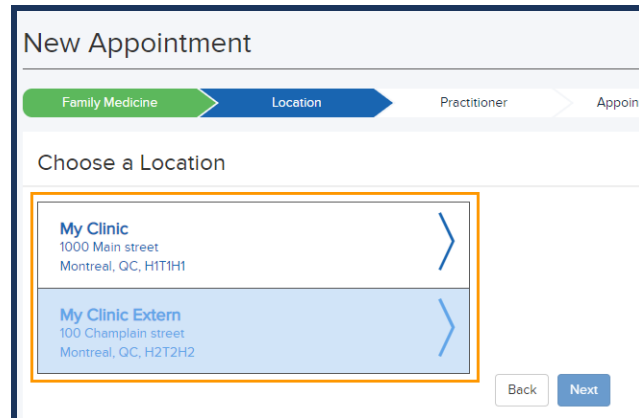


4. Choose a specialty that fits the type of consultation you are seeking.



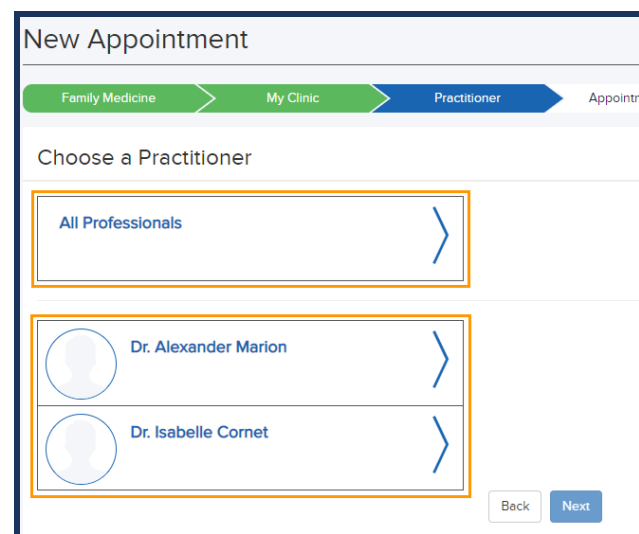
- The specialties offered vary depending on the clinic.

5. Select the address that fits best with your location if your clinic has multiple site options.



The screenshot shows the 'New Appointment' form with the 'Location' step selected. The form has a progress bar at the top with four steps: 'Family Medicine' (green), 'Location' (blue), 'Practitioner' (grey), and 'Appointment' (grey). Below the progress bar, the text 'Choose a Location' is displayed. There are two selection boxes, each with a right-pointing chevron. The first box is highlighted with an orange border and contains the text: 'My Clinic', '1000 Main street', and 'Montreal, QC, H1T1H1'. The second box is also highlighted with an orange border and contains the text: 'My Clinic Extern', '100 Champlain street', and 'Montreal, QC, H2T2H2'. At the bottom right of the form are 'Back' and 'Next' buttons.

- The clinic's addresses are displayed in the boxes to help you choose the preferred one.
6. Choose the practitioner with whom you want to book the appointment.
 - a. Click *All Professionals* if you don't have a preference as who will handle your visit.
 - b. Choose the name of a healthcare specialist if you only want to select an appointment from their availabilities.



The screenshot shows the 'New Appointment' form with the 'Practitioner' step selected. The progress bar at the top now shows 'Family Medicine' (green), 'My Clinic' (green), and 'Practitioner' (blue). Below the progress bar, the text 'Choose a Practitioner' is displayed. There are three selection boxes, each with a right-pointing chevron. The first box is highlighted with an orange border and contains the text: 'All Professionals'. The second box is also highlighted with an orange border and contains a grey profile icon and the text: 'Dr. Alexander Marion'. The third box is also highlighted with an orange border and contains a grey profile icon and the text: 'Dr. Isabelle Cornet'. At the bottom right of the form are 'Back' and 'Next' buttons.

7. Select the type of appointment that best fits your needs.

New Appointment

Family Medicine > My Clinic > All Professionals > Appointment Type

Choose an Appointment Type

Walk-in **Walk-in - follow up with doctor (20 minutes)**
Do not forget to bring your medical card

Annual Follow Up **Annual follow-up visit with medical care practitioner (30 minutes)**
Please bring to your appointment a list of all the questions you want to ask your doctor.

Back Next

- Every clinic has its own types of appointments.

8. Provide more information to narrow your search.

- a. Use one of the 2 options below to configure the calendar:
 - i. Check *As soon as* to see the next available options.
 - ii. Check *Anytime after* to see options starting from that date. Add a date or click the dropdown menu to choose from the calendar.
- b. Use the blank field to add information describing the reason for the appointment.
- c. Click *Next*.

New Appointment

Family Medicine > My Clinic > All Professionals > Walk-in

When would you like the appointment?

As soon as possible

Anytime after: yyyy-mm-dd

In a few words, describe the reason for the appointment

Back Next

9. Select the time slot that works best with your schedule.

Choose an Availability		
14 - 20 October		
	Morning	Afternoon
Mon 14	No Availability	No Availability
Tue 15	No Availability	No Availability
Wed 16	8:00 AM Dr. Alexander Marion	No Availability
	9:00 AM Dr. Alexander Marion	
Thu 17	No Availability	1:00 PM Dr. Isabelle Cornet
		2:00 PM Dr. Isabelle Cornet
Fri 18	No Availability	1:00 PM Dr. Marion D Test
		1:40 PM Dr. Marion D Test

- a. Use the arrows at the top of the page to change between weeks.
- b. Select an appointment by clicking on the desired slot.
 - o You are redirected on the details page.
 - i. Check the details to make sure that you selected the correct appointment.
- c. Click *Confirm Appointment* to book it or select *Back* to return to the schedule and choose a new appointment.

Confirm Appointment

Dr. Alexander Marion

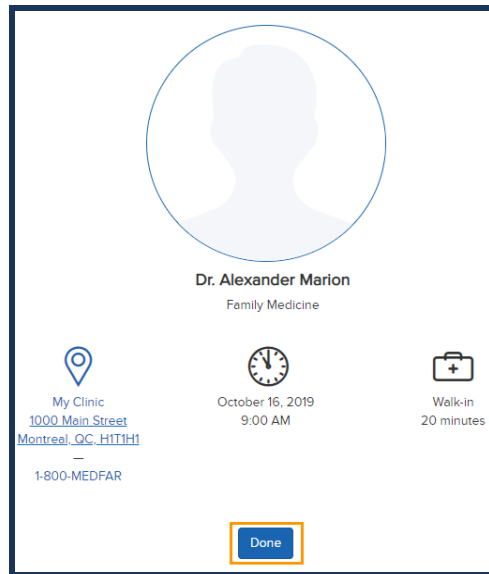
My Clinic
1000 Main Street
Montreal, QC, H1T1H1
1-800-MEDFAR

October 16, 2019
9:00 AM

Walk-in
20 minutes

Back Confirm Appointment

- d. Click *Done* when your choice is made.

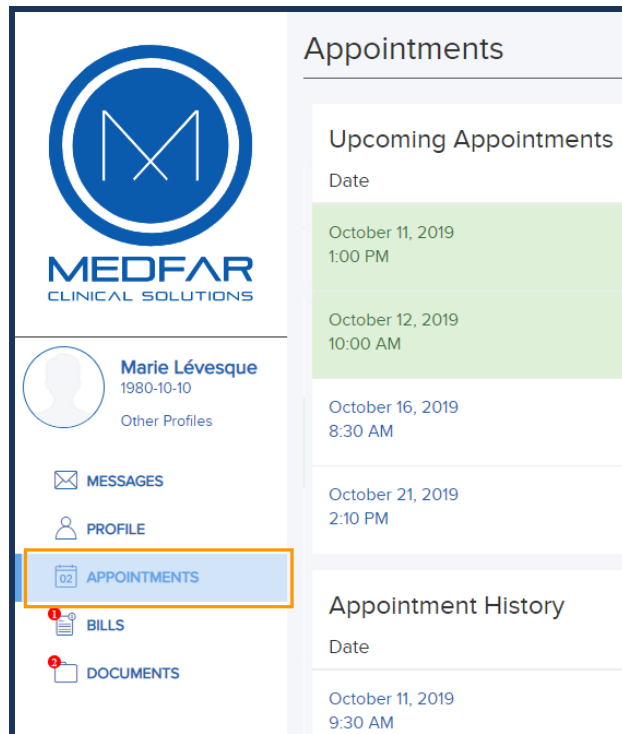


- You are redirected to the *Appointments* tab. You can view and manage your future appointments.
- A booked appointment can only be confirmed 72 hours beforehand.

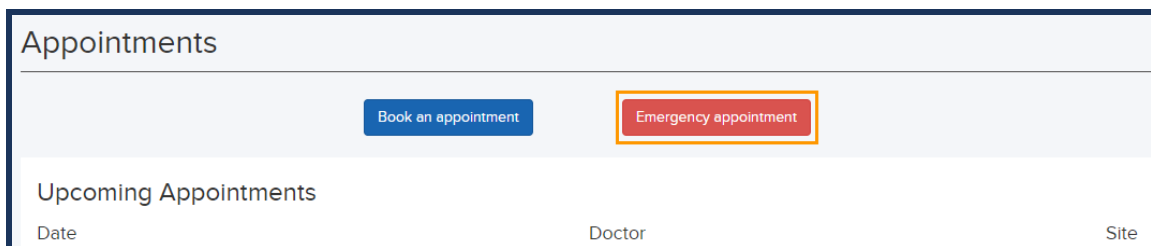
Booking an Emergency Appointment From Your Portal Account

Emergency appointments are meant to book a consultation with a health professional and are reserved for emergencies. To book an emergency appointment, follow the steps below:

1. Access your portal account.
2. Click the *Appointments* tab.



3. Choose *Emergency Appointment*.



4. Select the address that fits best with your location if your clinic has multiple site options.

The screenshot shows the 'Emergency Appointment' form. At the top, there are two tabs: 'Location' (selected) and 'Appointment Type'. Below the tabs, the heading 'Choose a Location' is displayed. Two location options are listed in a list box, each with a right-pointing chevron icon:

- My Clinic**
1000 Main Street
Montreal, QC, H1T1H1
- My Clinic Extern**
100 Champlain Street
Montreal, QC, H2T2H1

 The first option, 'My Clinic', is highlighted with an orange border. A 'Next' button is located at the bottom right of the form.

- The clinic’s addresses are displayed in the boxes to help you choose the preferred one.

5. Select the type of appointment that best fits your needs.

The screenshot shows the 'Emergency Appointment' form. At the top, there are two tabs: 'My Clinic' (selected) and 'Appointment Type'. Below the tabs, the heading 'Choose an Appointment Type' is displayed. Two appointment type options are listed in a list box, each with a right-pointing chevron icon:

- MINOR EMERGENCY** For consultations regarding one issue only (e.g. flu, ear infection, U
- COMPLEX EMERGENCY** For consultations regarding multiple issues or for mental health pr (minutes)

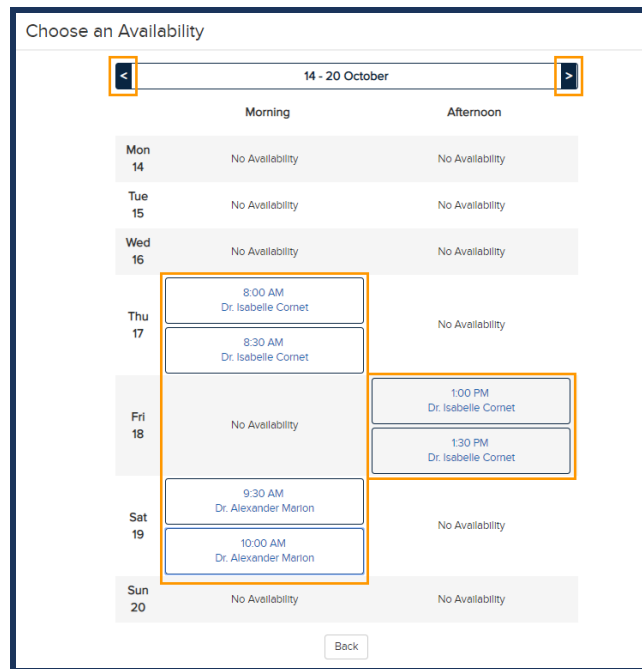
 The second option, 'COMPLEX EMERGENCY', is highlighted with an orange border. 'Back' and 'Next' buttons are located at the bottom right of the form.

6. Enter the reason for your appointment in the blank field.

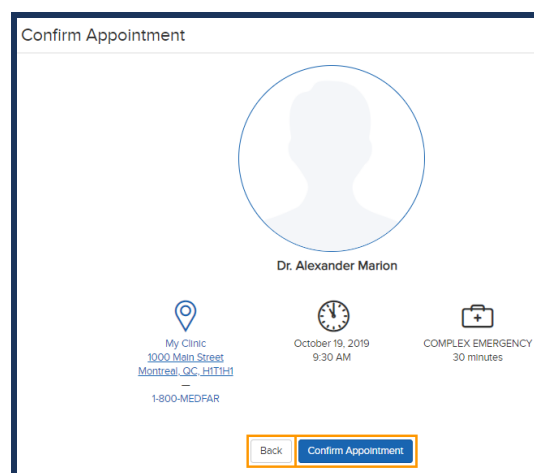
- a. Click *Next*.

The screenshot shows the 'Emergency Appointment' form. At the top, there are three tabs: 'My Clinic' (selected), 'COMPLEX EMERGENCY' (selected), and 'Qu'. Below the tabs, the heading 'In a few words, describe the reason for the appointment' is displayed. A large text input field is highlighted with an orange border. 'Back' and 'Next' buttons are located at the bottom right of the form.

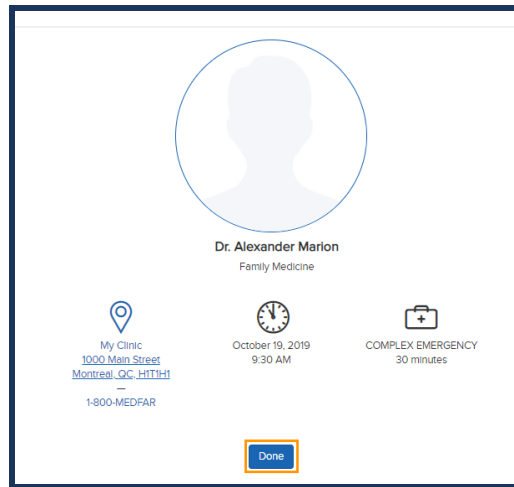
7. Select the time slot that works best with your schedule.



- a. Use the arrows at the top of the page to change the week.
- b. Select an appointment by clicking on the desired time.
 - o You are redirected on the details page.
 - i. Check the details to make sure that you selected the correct appointment.
- c. Click *Confirm Appointment* to book it or select *Back* to return to the schedule and choose a new appointment.



- d. Click *Done* when your choice is made.



- You are redirected to the appointments tab. You can view and manage your future appointments.
- A booked appointment can only be confirmed 72 hours beforehand.

Confirming and Cancelling an Appointment From the Portal

You can confirm and cancel an appointment directly from your portal account. Appointments, confirmed or not, can be cancelled online up to 48 hours before their time. If you want to cancel an appointment that is in less than 48 hours, you must call the clinic. To cancel an appointment from the portal, follow the steps below:

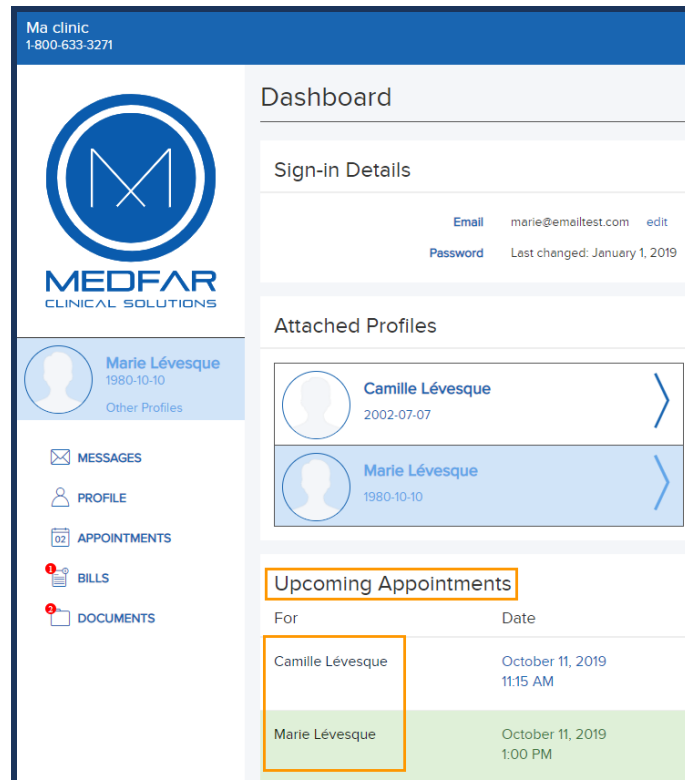
1. Access your portal account.
2. Manage your appointments using the *Appointments* tab or the *Dashboard*.
 - a. Select *Appointments* from the navigation menu to view your entire history.

Upcoming Appointments		
Date	Doctor	Site
October 11, 2019 1:00 PM	Dr. Alexander Marion Family Medicine	My Clinic
October 12, 2019 10:00 AM	Dr. Isabelle Cornet Dermatologist	My Clinic Extern
October 16, 2019 9:00 AM	Stephane Poitras SNP	My Clinic
October 19, 2019 9:30 AM	Dr. Alexander Marion Family Medicine	My Clinic
October 21, 2019 2:10 PM	Stephane Poitras SNP	My Clinic

Appointment History		
Date	Doctor	Site
October 16, 2019 8:30 AM	Dr. Isabelle Cornet Dermatologist	My Clinic Extern

- If you have multiple profiles linked to your account, the history displayed in the *Appointments* tab will only show the history associated with the profile selected, whose name is in the left side menu.

- b. Click your name in the left side menu to access your *Dashboard* and review the list of future appointments.

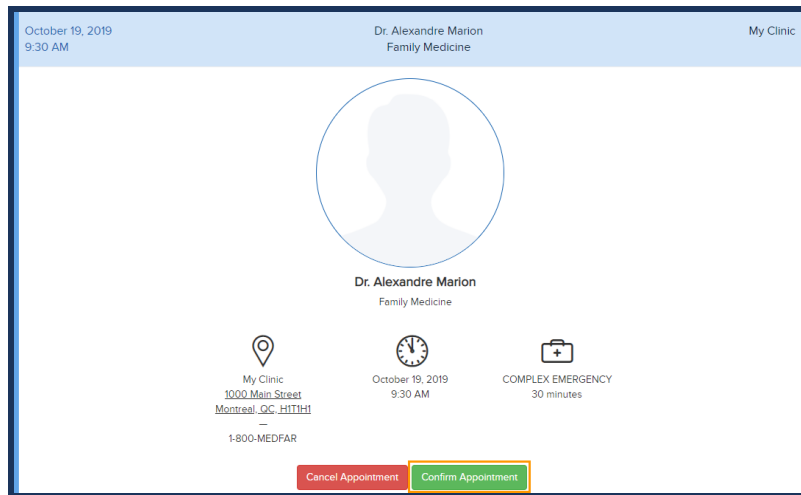


- If you have multiple profiles linked to your portal account, you will be able to see future appointments for everyone on your *Dashboard*.
3. View the details of an already booked appointment by clicking on it.
- Appointments in white are booked and have yet to be confirmed.
 - Appointments in red are cancelled.
 - Appointments in green are booked and confirmed.
- a. Expand the detailed view of an appointment by clicking on the coloured header.

Take one of the 2 following actions:

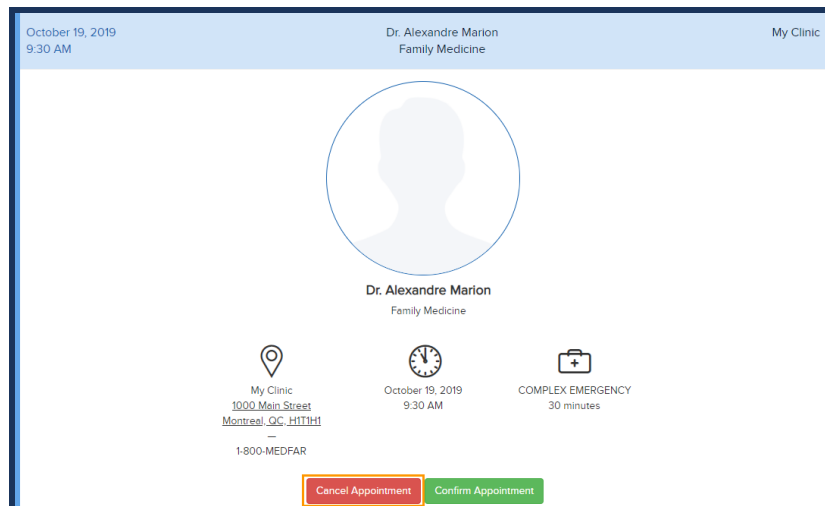
4. Click *Confirm Appointment* to send the confirmation to the clinic.
- If you don't have the option to confirm an appointment, it means that the consultation is in more than 72 hours. If you want to confirm an appointment you need to be within the allowed period.

- a. Collapse the detailed view of an appointment by clicking on the coloured header to go back.



5. Click *Cancel Appointment* if it no longer suits your schedule.

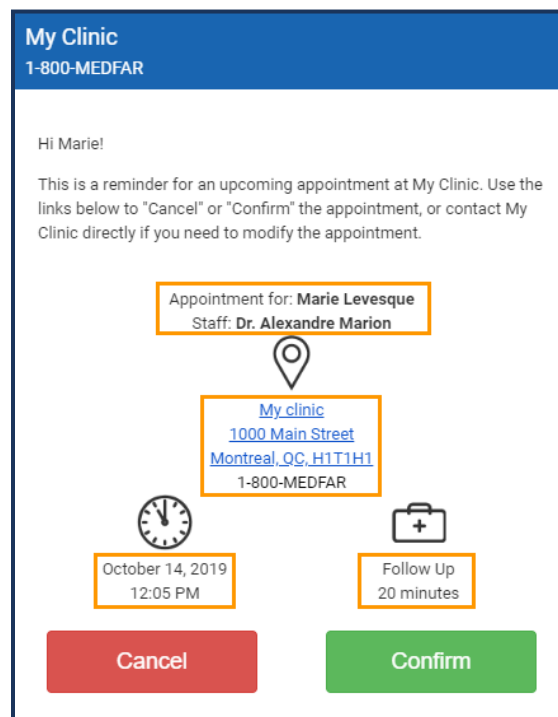
- o Appointments, confirmed or not, can be cancelled online up to 48 hours before their time. If you want to cancel an appointment that is in less than 48 hours, you must call the clinic.
- a. Collapse the detailed view of an appointment by clicking on the coloured header.



Confirming and Cancelling an Appointment by Email

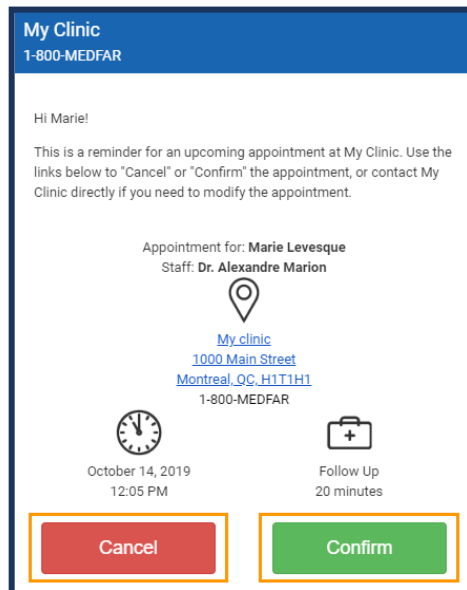
When creating your account, you will receive email notifications and reminders regarding your bookings and communication. To confirm or cancel an appointment by email, follow the steps below:

1. Connect to your email inbox and open the message sent by your clinic.
 - The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox
2. Check the details and verify the information.



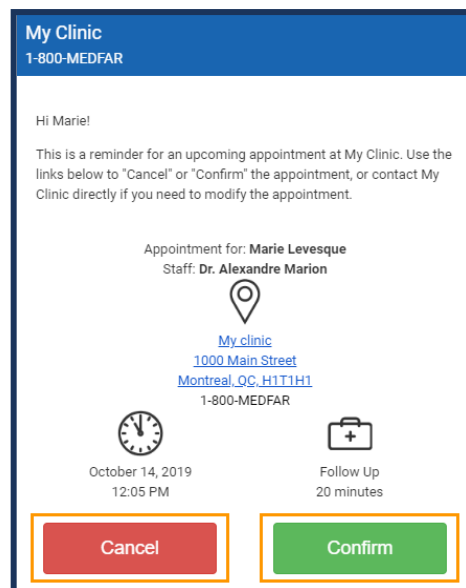
Take one of the 2 following actions:

3. Click *Confirm* to let the clinic know.



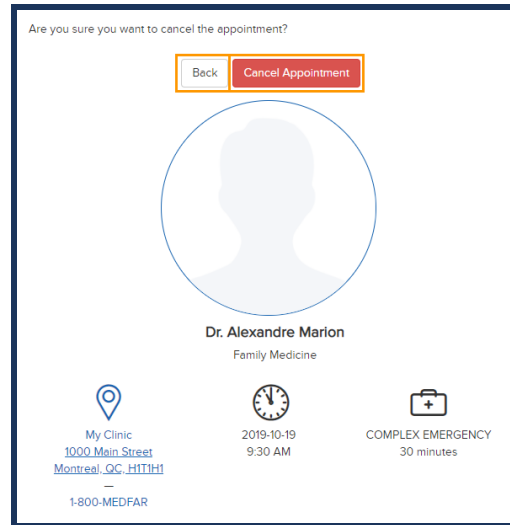
- A new window opens with a confirmation message.

4. Select *Cancel* if it is incompatible with your schedule.



- If you cancel the appointment by mistake, click *Back* in the new window.

- a. Click *Cancel Appointment* to confirm the action.



- b. Log into your portal account to book a new appointment, if needed.

Managing Your Communications

The patient portal offers the clinic a new way of communications information to you. However, note that if you want to contact the clinic, you must call them directly. To manage your communications from your portal account, select one of the following elements:

[Managing Your Messages](#)

[Managing Your Bills](#)

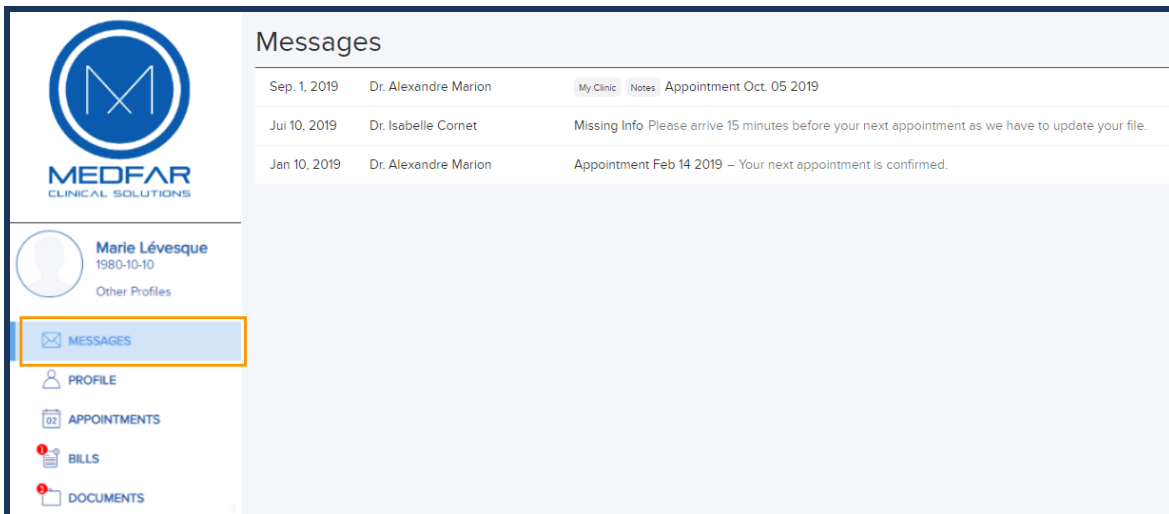
[Managing Your Notifications](#)

Managing Your Messages

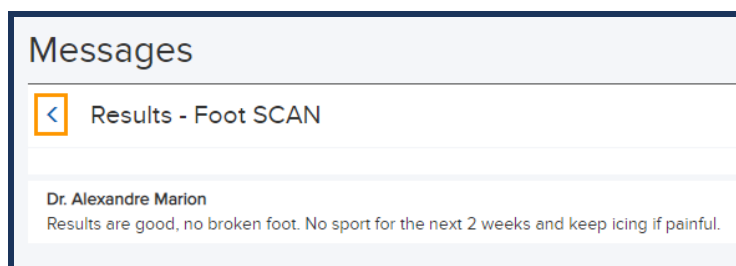
To access the messages sent to your portal account by the clinic, follow the steps below:

1. Click the *Messages* tab in the navigation menu.

- a. Make sure to select the correct profile if you have more than one linked to your account.



- o The red bubble next to the *Messages* tab indicates the number of unread messages you have.
2. Open a message by clicking on it.
 - o A bold text marks an unread message.
3. Click the arrow at the top to go back to the message list.

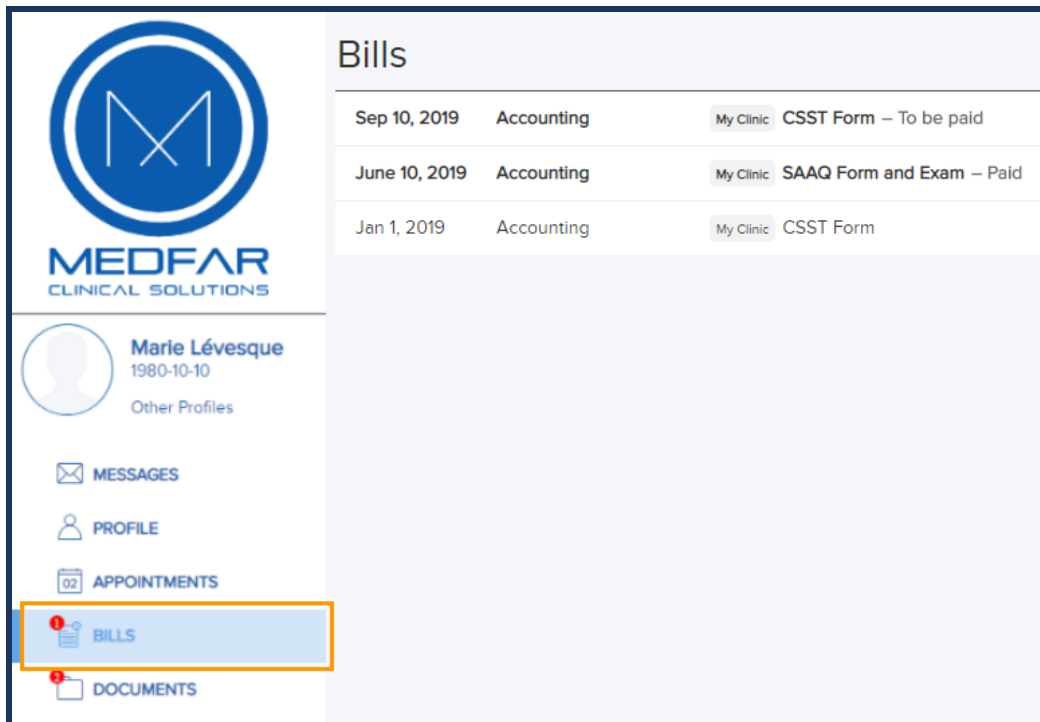


Managing Your Bills

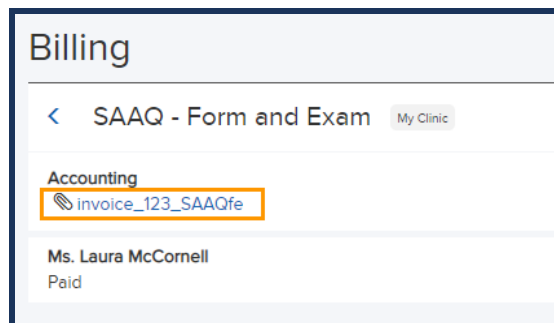
To access invoices sent to your portal account by the clinic, follow the steps below:

1. Click the *Bills* tab in the navigation menu.

- a. Make sure to select the correct profile if you have more than one linked to your account.

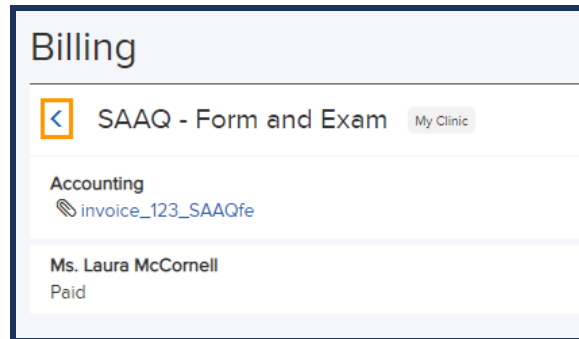


- The red bubble next to the *Bills* tab indicates the number of unread invoices you have.
2. Open an invoice by clicking on it.
 - A bold text marks an unread invoice.
 - a. Open the details of the invoice by clicking on the link.



- b. View, download or print the invoice from the pop-up window.

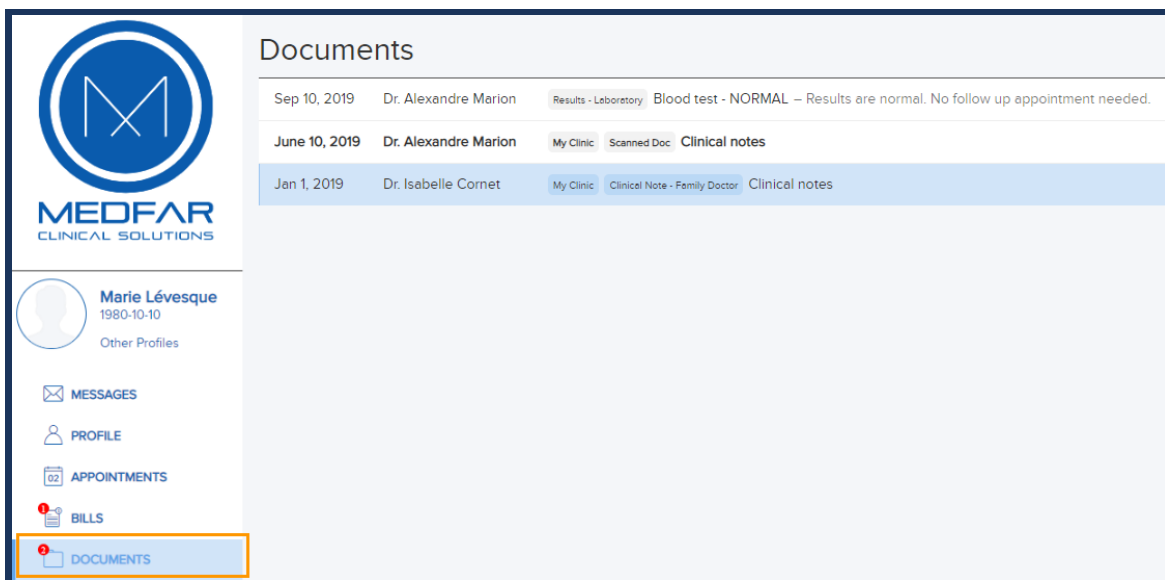
- Click the arrow at the top to go back to the invoice list.



Managing Your Documents

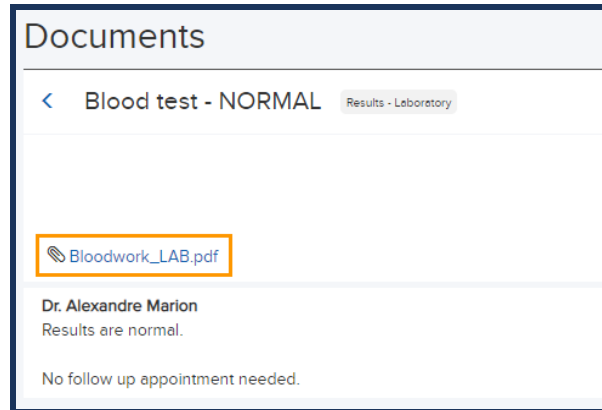
To access documents sent to your portal account by the clinic, follow the steps below:

- Click the *Documents* tab in the navigation menu.
 - Make sure to select the correct profile if you have more than one linked to your account.

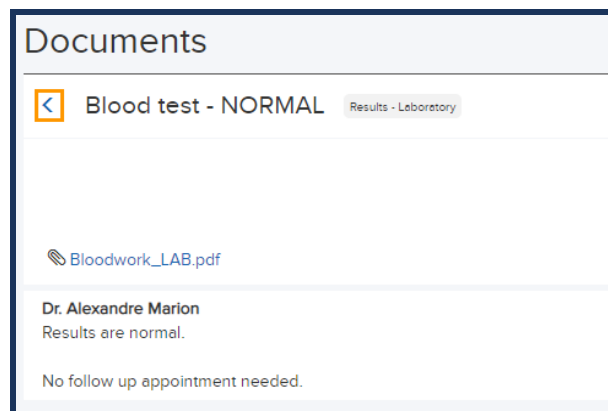


- The red bubble next to the *Documents* tab indicates the number of unread bills you have.
- Open a document by clicking on it.

- A bold text marks an unread document.
- a. Open the details of the document by clicking on the link.



- b. View, download or print the details from the pop-up window.
3. Click the arrow at the top to go back to the document list.



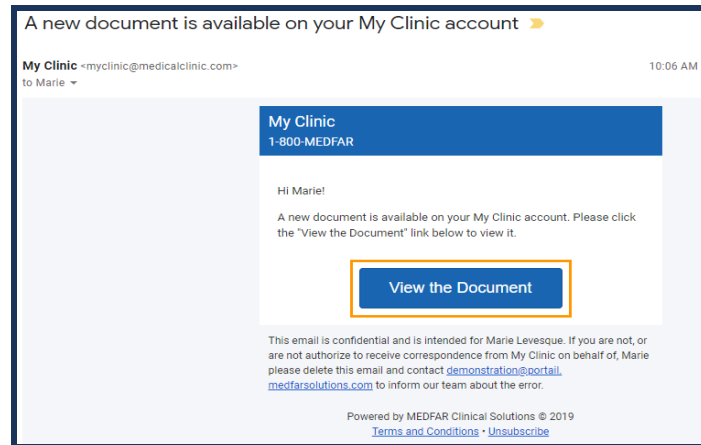
Receiving Email Notifications

For every communication shared to your portal account, an email notification is sent to you. Contact your clinic if you don't want to receive notifications.

If you unsubscribe directly from an email, you will no longer receive emails from the patient portal, even for password resets.

To view the information shared by the clinic, follow the steps below:

1. Connect to your email inbox and open the message from your clinic.



- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
2. Click *View the Message* or *View the Document* or *View the Invoice*.
 - You are redirected to the patient portal login page.
 - a. Enter the email address linked to your portal account.
 - b. Add your password.
 - c. Click *Login*.

A screenshot of the patient portal login page. It features two input fields: "Email" and "Password". Below the "Password" field is a link that says "Forgot your password?". A blue "Login" button is highlighted with an orange border. At the bottom of the page, there is a "New Patient?" section with a "Register" button.

- You land directly on the new communication page.