Welcome to Patient Online

With Patient Online you can update your demographic information, request an appointment, renew a prescription, send a message to your provider, even pay a bill, and more. If you have questions about the product, this Help is your one-stop shopping place for support using Patient Online. This Help is delivered in PDF format and will open in Adobe Reader. You can use the navigation buttons and features of Adobe Reader to move back and forth between topics or to search for information.

To use the Help, select from one of the topics below, or click one of the links in the left pane.

What do you want to do?
Send a message to my doctor
View my insurance plan
Schedule an appointment
View my account
Update my personal information
Access my child’s account
Renew a prescription
Learn More About Using Patient Online
Using Patient Online

Patient Online allows you to communicate with your doctor’s office over the Internet. Using a web browser and your own secure username and password, you can view much of the information that your provider has on file for you. Patient Online is like a mini-view into your own medical history kept by your doctor.

The Home Page

The Home page is the launching point to other areas of the product. The menu bar, located either horizontally across the top of the page, or vertically along the left side of the page, contains links to the other areas of Patient Online. Depending upon how your doctor uses Patient Online, some or all of these areas may be available to you.

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The Alerts section of the Home page displays a list of notifications or reminders that your doctor thinks are important for you to be aware of.

The Updates section shows you the most recent responses from your provider’s office.

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Request and Message Flow

The following section describes the path information follows when you submit a request or message to your healthcare organization using Patient Online.

E-mail policy

To protect your privacy, messages sent to your e-mail act as a notification of activity in your account. They will never contain specific information about the request, such as prescribed medications or appointment times. You get an e-mail alert only if you have chosen this option in Preferences and then only after a staff member of your healthcare organization receives or responds to a request. You must access Patient Online to see the details of the response.

Typical message flow

1. Each time you submit a request using Patient Online, such as an appointment request or prescription renewal, a Patient Online message is sent to your healthcare provider detailing the request.
2. A staff member at your healthcare organization receives and processes your request.
3. When the request is completed — such as when the appointment is scheduled — a Patient Online message reply is sent to you (via the Messages page) indicating the status of your request.
4. If the request cannot be fulfilled for example, a prescription cannot be renewed, the message provides an explanation and/or recommendation.
5. Depending on your e-mail preference setting, you might also receive an e-mail notification (in addition to the Patient Online message reply) when a request is completed.
Working with Messages

From the Messages page, you can communicate with your healthcare provider’s office. You can view messages that you have sent or received, reply to a message, or send a new message. The Messages page is located under the Messages menu.

In addition to sending a message directly to your provider, you can often send messages related to the other areas of Patient Online. For example, from the Appointments page you can access the detail of say, a future appointment. Once there you can click the link to Send a message about the appointment. The details of the appointment default into the message and you can send your question off that way.

View messages

1. From the Messages menu, click Messages.
2. Locate and then click the message you want to view.
3. Read the message or any of its history if there have been related messages.
4. Click Back to return to the Messages page.
Send a message to my doctor

There are two ways to send a message to your doctor: from the Home menu or from the Messages menu.

1. From the Home menu, click Patient Message.

2. On the Create Message page, select the provider to whom you want to send a message, and then type the subject and message text.

3. Click Next.

4. On the confirmation page, verify that the information you entered is correct, and then click Send. Note that you can only send messages to providers that are set up to allow for this secure messaging feature. After the message is sent, the Messages page displays again with the Sent Messages list showing.
E-Visit Message Flow

E-Visits are online consultations. Rather than coming in for an appointment with your physician, E-visits provide an alternative method of communication between you and your physician regarding your health situation. Your provider can then research your particular problem and, combined with the knowledge of your personal health history, can make a clinical judgement of the appropriate form of care for you.

E-Visits may be initiated by,

- You when you click the E-Visit link from the Messages page under the Consultation menu.
- Your provider when he/she responds to a message you’ve sent from the Send a Message page accessed from the Messages page under the Consultation menu.
Start an E-Visit

There are two ways to start an E-Visit: from the Home menu or under the Messages menu.

1. On the Messages or Home menu, click the E-Visit link.
   - Start an E-Visit link is also available from the Appointment Details and Medication Details pages after you click the Send a Message About link.

2. On the Start an E-Visit page, make your entries in each box.
   - Click the down-arrow in the Credit Card box to select from a list of your credit cards, or click the Add Card link to file another credit card in your list.
   - The Provider box contains a list of providers that are setup for messaging. Select one.
   - The Subject box should provide a brief description of your condition or question.
   - The Message box is where you describe your condition or question in more detail.

3. Click the Confirm Request button to access the Confirm E-Visit page.

4. Click Back to make changes to your message or click Send E-Visit.
Respond to my doctor's request for an E-Visit

When a provider initiates an E-Visit, they are requesting to convert your message into an online consultation because they feel your message requires more clinical attention.

To respond to your provider's request,

1. In the Replied Messages list on the Messages page, click your provider's response to your original question.
   - The Messages page displays the provider's request to change your message to an E-Visit.

2. Click one of the following three buttons:
   - **Approve** to agree to change your message/question into an online consultation or E-Visit.
   - **Request an Appointment** if you’d prefer to see your provider in the office. Complete the boxes on each page that asks for your appointment preferences.
   - **Decline** if you do not want to change the message to an E-Visit or if you do not want to make an appointment.
Working with Alerts

When you receive an Alert from your provider it is often because you’re being asked to take action. An Alert may remind you to schedule an appointment or it may suggest you attend a class. Alerts can be sent to you as an e-mail or online in Patient Online.

In response to an online alert, you may:

■ Request an appointment.
■ Send a message about the alert.
■ Decline the suggestion offered in the alert.

New online alerts are displayed on the Home page. Click the alert to view its detail. To view all alerts sent to you, both past and current, select Alerts from under the Consultation menu.

You have some control over whether or not you want to receive alerts. You can also elect to be sent e-mail ticklers which are simply e-mails indicating that there are new alerts for you in Patient Online.
Respond to an alert

There are two ways to access alerts: from the Alerts list on the Home page, or under the Messages menu.

1. In the Alerts list on the Home page, click the alert link. The alert detail displays.
2. Depending upon the type of alert you’re viewing, you’ll be asked to take an action.
   - For appointment reminders, click one of these buttons:
     - Request Appointment if you want to schedule an appointment based on your provider’s reminder.
     - Send a Message if you want to ask your provider a question about the reminder.
     - Decline if you don’t want to take any action.
     - Back if you want to return to the previous page with which you were working.

To view the history of any alerts you’ve been sent, from the Messages menu, click Alerts and then select the individual alert.
Maintaining Your Insurance Information

From the Insurance page, you can view more details about your insurance plan(s), add a new insurance carrier, remove an insurance carrier, or send a message to your doctor about your insurance.

View my insurance plan
1. From the Billing menu, click Insurance. The Insurance page displays.
2. In the list of insurance(s), click the name of the insurance carrier to view your own insurance plan details. The Insurance Details page displays.

Send a message about my insurance
1. From the Billing menu, click Insurance. The Insurance page displays.
2. Click the name of the insurance carrier to access the Insurance Details page.
3. Click the Send a Message about this Insurance link. The Send a Message page displays with your insurance plan information copied into the message area.
4. Type your message in the text box and click Next.
5. On the Confirmation page, review your message. To make any edits click Back. Click Send to send the message to your provider.

Add an insurance plan
1. From the Insurance page, click the Add an insurance plan link.
2. On the Add Insurance Plan page, type the your plan information in the appropriate fields. Click Next and then Send on the Confirmation page.
Working with Appointment

From the Appointments page, you can request a new appointment, view details for upcoming or past appointments, or request that an existing appointment be rescheduled or canceled. In some situations, you may be able to directly schedule an appointment. Appointments that can be directly scheduled appear with a little blue and yellow calendar icon next to the Reason for Visit field.

If the reason for your visit has been set up to allow direct scheduling, then when you enter your preferences for an appointment you'll actually initiate a real-time schedule search and a list of available times displays. You can click the More button to cycle through lists of appointment times. Once you choose a slot and click the Schedule button you've actually scheduled the appointment yourself.

What's an appointment request?

When you schedule, reschedule, or cancel an appointment, you are submitting a request for an appointment or change and not actually scheduling or changing the appointment (unless you selected a direct scheduling-enabled appointment type).

Each time an appointment request is submitted, a Patient Online message is sent to your healthcare organization detailing the request. A staff member at your healthcare organization then receives and decides whether or not to fulfill the appointment request. When the request is completed, a Patient Online message reply is sent to you indicating whether the office was able to handle your request. When the staff member completes the request, then the appointment is actually scheduled.

You can make the following requests:

- Request a new appointment
- Reschedule an appointment
- Cancel an appointment
- Send a message to the practice about the appointment
Request an appointment

To submit an appointment request,

1. From the Appointments menu click Schedule an Appointment, or from the Home menu click Schedule an Appointment.

2. On the Schedule an Appointment - Select Provider page, select a healthcare provider from the list and click Next.
   - To request an appointment with any provider in the practice, select Any provider, click Next and then select a department, or
   - If you don’t see the name of the provider you want it may be that it’s been a while since you’ve seen the provider and the relationship has expired. Select Any provider, click Next and then type the name of the provider in the Provider box. You must also select a department. (The Any provider option may or may not be available at your site.)

   Click Only schedule with above provider if you want to schedule the appointment with that healthcare provider only. Otherwise a scheduler may schedule you for an appointment with another provider at the practice to get you in if your regular one is too busy.

3. On the Schedule an Appointment page, type the appropriate information about the desired appointment. Follow the text on the page. Click Next.

4. On the Confirmation page, verify the information is correct. Click Back to edit any of it or click Send to submit your request.

5. The Messages page displays with the Sent tab in focus. Note that you can see your appointment request.

Note: This procedure does not schedule the appointment; the appointment is considered scheduled when the request has been fulfilled by your practice. To schedule an appointment yourself, refer to the topic, Schedule an appointment.
Schedule an appointment
First your provider must have enabled this feature in order for you to use it. Not all providers set up the system to allow for direct scheduling. If they have, here’s what you do,

1. From the Appointments menu click Schedule an Appointment, or from the Home menu click Schedule an Appointment.

2. On the Schedule an Appointment - Select Provider page, select a healthcare provider from the list and click Next.
   - To request an appointment with any provider in the practice, select Any provider, click Next and then select a department.

3. If your provider has turned on direct scheduling, you’ll see a calendar icon next to the types of appointments that can be directly scheduled. Select the Reason for Visit check box. You should only select one reason for the visit if you want to schedule the appointment yourself. Selecting more than one reason, whether or not they both display the direct scheduling logo, will generate an appointment request instead.

4. In the Date field, select a date from which you’d like to search for an available appointment time and click Next. It’s not necessary to enter date and time preferences here for direct scheduling. The Schedule Appointment page displays with a list of available times from which to select.

5. Select the radio button next to the appointment time you want. To see more available times, click More. Click Next after you’ve selected your time slot.

6. On the Confirmation page, verify the information is correct. Click Back if you want to change it, or click Schedule to book the appointment.

7. The Appointments page displays again and you can see your directly scheduled appointment in the Upcoming Appointments list.
Reschedule an appointment

To submit a request to reschedule an appointment, do the following:

1. On the Appointments page, in the Upcoming Appointments list, click Reschedule next to the appointment you want to reschedule.

2. On the Reschedule Appointment page, type your preferred appointment information and the reason for rescheduling the appointment. Follow the text on the page. Click Next.

3. On the Confirmation page, verify the information is correct. Click Send to submit your rescheduling request. The Messages page displays were you can see your request in the Sent messages list.

Note: If you have already submitted a request to cancel an appointment, the system will not allow you to reschedule the appointment. In this case, you must submit a request to schedule a new appointment.

Cancel an appointment

To submit a request to cancel an appointment, do the following:

1. On the Appointments page, in the Upcoming Appointments area, click Cancel next to the appointment you want to cancel.

2. On the Cancel Appointment page, type the reason you are canceling the appointment. Click Next.

3. Click Confirm Request.

4. On the Confirmation page, verify the information is correct. Click Send to submit your rescheduling request. The Messages page displays were you can see your request in the Sent messages list.

Note: The reschedule and cancel links are only available if the healthcare provider or practice is setup to allow those functions.
Viewing Account Information

From the Account Status page, you can view information about your account, such as your current balance or the details of a particular invoice. Invoice balances are displayed first by group or practice and then the invoices are organized into two categories, as follows:

1. Invoices with a balance that is payable by the patient or guarantor (patient balance invoices).
2. Invoices with an insurance carrier responsibility and/or invoices with no remaining balance due (all other invoices).

If you are the guarantor of other dependents, your healthcare organization may use a family billing setup which would allow you to view the invoices of your dependents who also received services all grouped into one page.

You can perform the following account status procedures:

- Send a message about an invoice.
- View account information.
- View invoice details.
- Pay remaining balance online by credit card.
View my account

1. On the Account Status page under the **Group** list, click the group in which you have invoices you want to review. The Account Status - **group** page displays.
2. To view invoice details click the invoice number. The Invoice Details page lists each date of service on the invoice and the associated charges, payments, and adjustments.
3. To send a message about an invoice, click **Send a Message About this Invoice** link.

*Note*: The invoice information you can view may differ from this description based upon whether or not your provider’s practice has implemented family billing and account statuses by group features.

Pay my bill

You can only pay outstanding balances on **your own** invoices; that is, invoices in the Patient Balance list. You can view the balance from your insurance plan invoices, but you cannot pay them. To pay the remaining balance or part of a remaining balance on your invoice, do the following:

1. On the Account Status page, click the group link next to the group in which there are invoices you want to pay, or click **Pay** next to the balance to pay-off all the outstanding patient balance invoices for that group.
2. On the Account Status - Group Account page, click **Pay** next to the invoice with the balance you want to pay. To pay-off the entire patient balance, click the **Pay** link shown in the **Current Balance** column.
3. Enter the amount you want to pay, the credit card you want to use, the associated information and any comments you would like to add.
4. Click **Next**.
5. On the Confirmation page, verify that the information you entered is correct, and then click **Send**.

*Note*: The invoice information you can view may differ from this description based upon whether or not your provider’s practice has implemented family billing and account statuses by group features.
Maintaining Your Personal Information

From the Personal Information page, you can view or change your Patient Online password or your personal information, such as your e-mail, mailing address, telephone number, employer, or emergency contact information. You can also view submitted personal information update requests that have not yet been fulfilled.

Password and e-mail changes are effective immediately and you do not receive a message from the practice; however, personal information change requests are submitted to a staff member at your healthcare organization who then attempts to fulfill the request. When the request is processed, a Patient Online message is sent to you indicating the status of the request. You only receive messages for actions that are not immediate.

You can perform the following procedures from the Personal Information page:

- View or change your personal information
- View or change your e-mail address
- Change your Patient Online password
- View pending personal information updates

Update my personal information

1. From the Records menu, click Personal Information. The Personal Information page displays. There are two tabs: Personal Information and Guarantor.

2. To make updates to the information, click the Change Personal Information for This Patient link. The Update Personal Information page displays.

3. Type your changes in the appropriate fields. To submit an e-mail address change, make the change here. Click Next to move on to the Confirmation page.

4. On the Confirmation page, verify the information is correct and click Send. Click Back if you needed to make corrections. The Messages page displays with your personal information update message showing in the Sent Messages list.
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