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Chapter 1

Supported browsers

The following browsers are supported by Allscripts FollowMyHealth™ Patient Access.

- Microsoft® Internet Explorer® 8.0 or later
  - Note: You must use Microsoft® Internet Explorer® 10.0 or later if you want to view goals from the Goals tab.

- Mozilla Firefox® 2.0 or later
- Google Chrome™ 4.0 or later
- Apple® Safari® 3.0 or later
Chapter 2

Patient Access user logon

Log on as existing user

You can log on to Allscripts FollowMyHealth™ Patient Access as an existing user after you have registered and have a user ID and password.

1. Access the Allscripts FollowMyHealth™ Patient Access logon window in 1 of 2 ways.
   > Use your provider's custom Allscripts FollowMyHealth™ URL located at a subdomain URL.
   > Use the default Allscripts FollowMyHealth™ URL at https://www.followmyhealth.com/patientaccess. Log In opens.

2. Click Log In.

Figure 1: Log In window
Log In opens with a selection of account logon methods.

Figure 2: Log In window with authentication

3. Click your preferred logon authentication method.
   You set up a primary authentication method when you first activated and registered your account. If you want to use FMH Secure Login, but have already logged on using an alternate logon method, you can create a FMH Secure Login and use that as your primary authentication method. To add another authentication method, including FMH Secure Login, go to My Account > Preferences > Login Preferences.
   Your authentication method logon window opens.

4. Enter your user name and password and click Log in.
   Allscripts FollowMyHealth™ Patient Access opens.
Get started as a new user

To get started with the Allscripts FollowMyHealth™ Patient Access, you are sent an email invitation. The email contains an individualized link to the Allscripts FollowMyHealth™ Universal Health Record logon window, where you can activate your account, select or create a primary logon method, and access your account for the first time.

Register a new account

The email invitation sent to you from your provider's organization provides a link for you to start the registration process.

You register your account by creating a new account or adding a connection to an existing account.

From the email, click the **Register for FollowMyHealth** link. Your provider's Allscripts FollowMyHealth™ logon window opens.
Create an Account

Add This Connection

Note: Organizations can customize the portal logon window. The graphics, colors, and text might look different, but Add This Connection and Create Account are always displayed.

- Click Create an Account if you do not have an existing Allscripts FollowMyHealth™ account.
- If you already have a Allscripts FollowMyHealth™ account, click Add This Connection. Create an Account opens, or the Invite Wizard starts and Connect your account Step 1: Welcome opens.

Create a new account

If you did not receive an invitation from your provider, but want to become a Allscripts FollowMyHealth™ user, you must create an account.

1. From the Allscripts FollowMyHealth™ logon window, click Create an Account. Create an account opens.
2. Enter the applicable information in the boxes.

**Notifications Email**

Specifies an email address where you can receive notifications regarding your health record.

**First Name**

Specifies the first name of the account holder.

**Last Name**

Specifies the last name of the account holder.
Date of Birth

Specifies the account holder's date of birth.

Zip Code

Specifies the ZIP Code of the account holder.

Cell Phone Number

Specifies the cell phone number of the account holder. This is optional.

Home Phone Number

Specifies the home phone number of the account holder. This is optional.

Social Security Number

Specifies the Social Security Number of the account holder. This is optional.

3. Read the terms of use and click I Accept.
   Select a Login Method opens.

If you are a first-time user, you must select an authentication method.

Connect an existing FollowMyHealth account

You can connect an existing Allscripts FollowMyHealth™ account to another healthcare provider's patient portal.

Before you begin

You must have an email invitation from the healthcare provider to join the patient portal.
This process registers your account with the healthcare provider patient portal and enables you to log on to the provider's patient portal.

This task has 6 steps.

1. From the Allscripts FollowMyHealth™ logon window, click **Add This Connection**. The organization’s logon window opens.

![Add This Connection](image1)

2. Select an authentication method and log on with your existing Allscripts FollowMyHealth™ account credentials. The **Invite Wizard** starts and **Connect your account Step 1: Welcome** opens.

![Connect your account Step 1](image2)

**Figure 4: Step 1**

The progress bar represents the step you are on in the account connection process.

3. Click **Next**. **Connect your account Step 2: Enter Invite Code** opens.
4. Enter the invitation code that you received in the invitation email and click **Next**.  

   **Note:** The code is usually the last 4 digits of your Social Security number or your birth year. If you do not know your invite code, contact the healthcare organization who invited you.

**Connect your account Step 3: Accept Terms of Service** opens.

5. Click **I Accept** to accept the terms of service for your healthcare provider.
Connect your account Step 4: Release of Information opens.

6. Click I Accept to release your healthcare record to Allscripts FollowMyHealth™.

You must accept the Release of Information. The Release of Information permits Allscripts FollowMyHealth™ to obtain and store your medical information from the organization. If you decline, your medical information is not obtained from the organization.

Connect your account Step 5: Upload Health Record opens.
Results of this task
When the upload is complete, your account is connected to Allscripts FollowMyHealth™ and the Home tab is displayed.

Register as an authorized individual
If a patient requires an authorized individual, an email invitation is sent to the authorized individual and he or she must create an account or log on with his or her existing Allscripts FollowMyHealth™ credentials.

This task has 7 steps.

1. Click the Allscripts FollowMyHealth™ invitation link in the invite email received from the organization.
   Log In opens.
Figure 9: Log In window

The progress bar represents the step you are on in the account connection process.

2. If you have an existing Allscripts FollowMyHealth™ account, log on with your credentials. If you do not have an account, click Create an Account, create the account, and then log on. The Invite Wizard starts and Register as Proxy opens after you log on to Allscripts FollowMyHealth™ Patient Access.
3. Click **Next**.

**Register as a proxy Step 2: Enter Invite Code** opens.

4. Enter the invite code that you received when you requested authorized individual access and click **Next**.

If you do not know your invite code, contact the healthcare organization who invited you.

**Register as a proxy Step 3: Release of Information** opens.
5. Click I Accept to release the healthcare record to the healthcare provider. **Note:** This step is only presented to the first authorized individual user for a patient. All subsequent authorized individual users are not presented with this step.

Register as a proxy Step 4: Authorized Individual Acceptance opens.

6. Click I Accept to authorize individual acceptance. You must accept Authorized Individual Acceptance for the patient you are a authorized individual for. This acceptance details what access is authorized for the authorized individual.

Register as a proxy Step 5: Authorized Individual Authorization opens.
7. **Click I Accept** to authorize individual authorization. You must accept **Authorized Individual Authorization** for the patient that you are an authorized individual for. This acceptance details what access is authorized for the authorized individual. You are only prompted to perform this step if the patient is not able to create his or her own Allscripts FollowMyHealth™ account.

**Connect your account Step 6: Upload Health Record** opens and the healthcare record is uploaded. When the upload is complete, the **Home** tab is displayed.
Select an authentication method

You can log in using authentication methods including FMH Secure Login, Facebook, Google, Yahoo!, Microsoft® Windows® Live ID, or Cerner Health.

**Attention:** Logging in with an authentication method other than FMH Secure Login only authenticates you to Allscripts FollowMyHealth™. Your login information is not shared between Allscripts FollowMyHealth™ and these authentication providers. Allscripts FollowMyHealth™ does not have access to your password.

1. To use FMH Secure Login, Facebook, Google, Yahoo!, Microsoft® Windows® Live ID, or Cerner Health, click the respective icon ( ). The application logon window is displayed for the application icon that you clicked.

2. Log on to the application using your existing account or click to create a user name and password.

Create an FMH Secure Login account

You can create your own unique user names and passwords for accessing Allscripts FollowMyHealth™ by creating a FMH Secure Login account.

To use FMH Secure Login to log on to the Allscripts FollowMyHealth™, you must first create a Allscripts FollowMyHealth™ secure logon account.

FMH Secure Login registration is separate from Allscripts FollowMyHealth™ registration, but is integrated into the invitation acceptance process for first-time users who want to create a unique authentication account.

**Note:** If you are using another authentication method and want to add FMH Secure Login, click My Account > Preferences > Login Preferences.

1. From Allscripts FollowMyHealth™ logon window, click .
Create FMH Secure Login opens.

![Create Your FMH Secure Login window]

Figure 15: Create Your FMH Secure Login window

2. Enter information in the boxes.

**Username**

Specifies a user name. User names must start with a letter and cannot use spaces or other special characters.

**Email**

Specifies a valid email address. This email address is used for FMH Secure Login correspondence emails. You receive 1 email during the registration process. If you want to use the 2-step verification method with email as the communication method of choice, this email is used to send the PIN. To enable 2-step verification, click **My Account > Preferences > Login Preferences > FMH Secure Login Preferences**.
Confirm Email

To prevent lost correspondence to the recipient of FMH Secure Login credentials, you must confirm your email address.

Password

Specifies a password. The password must have at least 1 alpha, 1 numeric, and 1 special character, with the entire password being no less than 8 characters.

Confirm Password

You cannot complete the registration process without successfully confirming the password.

3. Click Continue.

An email is sent to the email account that you entered in the Email and Confirm Email boxes in step 2 of this task.

What to do next
Set up your logon preferences and log on to Allscripts FollowMyHealth™ for the first time.

Request a connection to a healthcare organization

When you create a Allscripts FollowMyHealth™ account without an invitation from your healthcare organization, you are prompted to request a connection to 1 or more area healthcare organizations who participate in Allscripts FollowMyHealth™.

You can search for matches by ZIP Code, provider, or organization. Allscripts FollowMyHealth™ searches by ZIP Code by default. If you do not want to request connections, click Skip This Step. If you click Skip This Step, you are prompted to verify that you do not want to search for connections and Home opens.

1. Enter your ZIP Code, organization, or provider in Search.
 Providers and organizations are listed in Search Results.
2. Click **Connect** adjacent to the organization that you want to connect to.
The organization is listed in **My Organizations**.

3. Click **Connect** when you have added all of the organizations to connect to.
**Connection Request Successful** opens.

4. Click **OK**.
The **Home** tab opens.

**Results of this task**
The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your Allscripts FollowMyHealth™ account contains only the demographics information that you provided when you created your account.
Chapter 3

Static toolbar

The static toolbar is available from all Allscripts FollowMyHealth™ Patient Access windows and tabs.

![Static toolbar](image)

**Figure 17: Static toolbar**

You can compose email messages, request appointments, view the logged-in user or proxy, access **My Account**, change the portal language, and search from the static toolbar.

**Message**

Compose a secure Allscripts FollowMyHealth™ message to any connected provider who has enabled messaging. This label is not displayed if you are not connected to a provider who has enabled messaging.

**Request Appt**

Request or directly schedule an appointment with any provider who has enabled online appointment requests. This label is not displayed if you are not connected to a provider who has enabled online appointments.

**Hello**

Displays who is logged on to Allscripts FollowMyHealth™ Patient Access. You can use list to access authorized individual accounts assigned to you.

**My Account**

Configure connections to providers, billing, and preferences; log off from the application; and find Support and Help information.

**Español**

Click **Español** to change the user interface to Spanish language.
Chapter 3 Static toolbar

Search

Click the Search icon to search all tabs in Allscripts FollowMyHealth™ Patient Access.

Search FollowMyHealth Patient Access

You can search all tabs and windows in Allscripts FollowMyHealth™ Patient Access using the search icon located in the static toolbar.

Search features a quick list option or you can open the Search window for results.

1. From the static toolbar, click .
   A quick list is returned for results or you can click See more results.
   
   Figure 18: See more results or quick list

2. Click See more results.
   Search opens.
The search results are organized in a tabs.

3. From Description, click the result description to open details about the item. If the item is a clinical item, an edit dialog opens where you can edit the item.

My Account

You can manage account connections, billing, and preferences from My Account on the static toolbar.

You can also access support and help, and log off from Allscripts FollowMyHealth™ from My Account.
Manage connections

You can manage connections to organizations and clinic settings associated with the organization.

This task has 6 steps.

1. Click **My Account > Connections**. **Connections** opens.

2. Click the **Manage Connections** tab. A list of connections and pending connections are displayed in the tab.

3. To edit the clinic settings for each connection, click **Edit**. An interactive graph of the connection is displayed on the **Visualize Connections** tab. When accessing the **Visualize Connections** tab through **Edit**, you can only update the types of clinic settings that are connected to the provider. Otherwise, directly clicking the **Visualize Connections** tab enables you to see details about the connections and settings.

   Turn on and off clinic settings that you want to include in your connection by clicking **On** or **Off**. You can also click an image in the graph to change the status of the clinic settings. The setting is turned off when the line connecting **Clinic Settings** and the setting is red.
4. To view the details about each connection, click the **Visualize Connections** tab. Your care system, as known by Allscripts FollowMyHealth™, is displayed on the **Visualize Connections** tab. You are represented by your picture in the center of the graph. The healthcare organizations that you are connected to, proxy representation, and clinical settings starburst from your photo.

Click an organization, proxy, or setting represented on the graph and the details open in **Connection Details**.
Click **Re-Center Graph** to go back to the center of the graph.

5. To remove a connection, click the delete ✗.
   A message opens where you can confirm that you want to delete the connection.

6. Click **OK**.

**Add a connection**

You can add a connection to an organization from **My Account**.

This task has 9 steps.

1. Click **My Account > Connections**. 
   **Connections** opens.

2. Click the **Manage Connections** tab.
   A list of connections and pending connections are displayed in the tab.

3. Click **Add Connection**.
   **Organization Search** opens.

4. For **Search**, enter your ZIP Code, organization, or provider.
   Search results are displayed in **Organization Search**.
5. To narrow the search results, for **Distance in Miles**, enter the number of miles from the ZIP Code that you want to search, or select the type of organization from **Organization Type**.

6. Select an organization from the search results.

7. Click **Connect**.
   **Release of Information Authorization** opens.

8. Click **Accept**.
   **Connection Request Successful** opens.

9. Click **OK**.
   The organization connection is added to the **Manage Connections** tab.

**Results of this task**
The organizations are notified that you want to receive your health information online. Response times to connection requests vary by organization and some organizations might require more information before releasing your information. Until the organizations respond to your connection request, your Allscripts FollowMyHealth™ account contains only the demographics information that you provided when you created your account.

**Manage account preferences**
Preferences control several processes in Allscripts FollowMyHealth™ such as authorized individual, logon methods, account notifications, news alerts, and restoring deleted items.

There are 6 sections in **Preferences**.

> **Account Preferences**
  Manage your health record accounts, proxy accounts, and delete accounts.

> **Login Preferences**
  Manage your logon methods, such as FMH Secure Login.

> **Notification Preferences**
  Manage how you want to be notified about new information to your health record.

> **Restore Deleted Items**
  View and restore items that you have deleted from your health record account.

> **Activity History Log**
  View the recent activity for your health record account. The log includes these actions: view, downloaded, and transmitted, accessed, printed, emailed, and faxed.

> **Display Preferences**
  Manage the visual display settings in your Allscripts FollowMyHealth™ account.
1. Click My Account > Preferences. Preferences opens.

![Preferences window](image)

**Figure 23: Preferences window**

2. Select the preference section that you want to work with.

**Invite an authorized individual**

You can invite another person to access your Allscripts FollowMyHealth™ account by using the **Invite a Proxy** process from Allscripts FollowMyHealth™ Patient Access.

If you want to be an authorized individual for another patient, he or she must invite you from his or her own Allscripts FollowMyHealth™ account, or the healthcare organization must send you an authorized individual invitation email on behalf of that patient. To request authorized individual access to a minor, contact your child's healthcare organization.

This task has 5 steps.

1. From Preferences, click **Account Preferences**. **Account Preferences** opens.

2. Click **Invite a Proxy**. **Invite a Proxy** opens.

3. Complete the information in **Invite Proxy**.
   If you want the authorized individual to have full access to your account, that is, access your Allscripts FollowMyHealth™ account, view your information, enter new data, delete data, or send secure messages to your providers on your behalf, click **Full Access Proxy**. If you want the authorized individual to be able to only view your account, click **Read Only Proxy**.
Important: The security code is required for your authorized individual to accept the invitation. Make sure to remember the security code so that you can provide it for the person you are inviting.

4. Click OK. Invitation Confirmation opens where you can confirm that you want to send an authorized individual invitation.

5. Click OK to send the authorized individual invitation.

Manage billing

You can manage billing for multiple providers, including paying invoices, viewing pending insurance submissions, and viewing paid invoices.

There are 3 sections in Billing.

> Patient Responsibility
  Displays the invoices that you owe the organization. The list format includes date of service, invoice number, provider, procedures, charges, and amount due.

> Pending with Insurance
  Displays the invoices that have been submitted to insurance.

> Paid Invoices
  Displays invoices that have been paid in full.

This task has 6 steps.

1. Click My Account > Billing.

Note: If you are connected to a provider that does not support billing, a message is displayed, Billing is not currently supported by any of your connected organizations, and the window is blank.

Billing opens.
2. If you are connected to more than 1 organization, select an organization from **Organization**.

3. To pay an invoice in **Patient Responsibility**, you can either select **Pay All Invoices** to pay all of the outstanding invoices listed or select a single invoice from the list. The invoice amount is displayed in the **Pay Now** box.

   You can also enter a partial payment amount for an invoice in the **Pay Now** box.

4. Click **Pay Now**.
   The organization's web page opens. Enter the required information and click **Process Transaction**.

   A confirmation receipt window opens if the transaction is successful and an email is sent to your Allscripts FollowMyHealth™ Patient Access inbox.

5. To view the invoices that are pending insurance processing, click the **Pending With Insurance** section.
   **Pending With Insurance** opens. Invoices listed in **Pending With Insurance** have been sent to your insurance company for payment. These invoices are not your responsibility for payment at this time.

6. To view a history of paid invoices, click the **Paid Invoices** section.
   **Paid Invoices** opens with a list of invoices that have a zero balance.
Delete your Universal Health Record account

Important: This action permanently deletes your Allscripts FollowMyHealth™ account and you no longer have access to your online healthcare record or providers. You cannot recover the deleted data.

1. From Preferences, click Account Preferences. Account Preferences opens.
2. Click Delete your UHR. A warning message window opens to confirm that you want to delete your account.
3. Click OK to permanently delete your Allscripts FollowMyHealth™ account.

Add an authentication method

You must select an authentication method to log on to Allscripts FollowMyHealth™. Authentication methods include FMH Secure Login, Facebook, Google, Yahoo®, Microsoft® Windows® Live ID, or Cerner Health.

You can add or disconnect logon methods using Login Preferences. You must have 1 active logon method at all times; you cannot disconnect a logon method if it is your only enabled method.

1. From Preferences, click Login Preferences. Login Preferences opens.
2. Click **Connect** next to the authentication method that you want to add. The logon window opens for the authentication method.

3. Enter your user name and password for the authentication method. **Disconnect** changes to **Connect** next to the authentication method in **Login Preferences**.

**Results of this task**

You have added an authentication method. The next time you log on to Allscripts FollowMyHealth™, click the authentication method icon that you want to log on with.

**Set notification preferences**

There are several ways for you to be alerted by Allscripts FollowMyHealth™ when a provider or organization has a notification for you. Notifications include **My Reminders**, **Goal Alerts**, **Appointment Reminders**, **Appointment Updates**, **Organization Bulletins**, and **Notice Communication from Provider**.

You can also change a cell phone number and email address from the **Notification Preferences** tab in **Preferences**.

1. From **Preferences**, click **Notification Preferences**. The **Notification Preferences** tab is displayed.
2. Go through each notification type section and select **Email** or **Text Message** to configure how you want to receive notifications. The notification email defaults to the email address used for the patient’s invitation and all notification preferences default to email.

**Appointment Reminders**

Specifies how the organization that you are connected to can send appointment reminders. You can receive an email in your external email account or a text message notifying you when an appointment reminder has been added to your Allscripts FollowMyHealth™ inbox.

**Appointment Updates**

Specifies how the organization that you are connected to might send appointment updates. You can receive an email in your external email account or a text message notifying you when an appointment update has been added to your Allscripts FollowMyHealth™ inbox.

**Updates to Health Record**

Specifies how the organization that you are connected to can send health record updates when a new item is added to the **My Health** section in Allscripts FollowMyHealth™. You can receive an email in your external email account or a text message notifying you when health record updates are added to **My Health**.
Notice of Communication from Provider

Specifies how you can receive an email in your external email account or a text message notifying you when a secure message is added to your Allscripts FollowMyHealth™ inbox from your provider.

Organization Bulletins

Specifies how the organization you are connected to can send general news bulletins, for example, sharing holiday hours or notifying you of a flu shot clinic. You can receive an email in your external email account or a text message notifying you when a bulletin has been added to your Allscripts FollowMyHealth™ inbox.

My Reminders

Specifies how you will receive reminders. My Reminders are automatically created for new goals and can be configured for anything that you want to use them for.

Goal Alerts

Specifies how the organization that you are connected to can send goal alerts: through email or text message. You automatically receive goal alerts in Action Center if your reading violates 1 or more rules set by your provider.

If you select to receive notifications through text message, Release of Information Disclaimer opens. If you agree to receive personal information through a text message, click Yes. If you do not want to receive personal information through a text message, click No.

Change your cell phone number

Allscripts FollowMyHealth™ sends you notifications through an external email address or cell phone. The cell phone number that you added when you registered for an Allscripts FollowMyHealth™ account is displayed in the Notification Preferences tab, Demographics, and Goals when you accept a goal. You can change a cell phone number from either of these locations.

This task has 7 steps.

1. From Preferences, click Notification Preferences. The Notification Preferences tab is displayed.

2. Click Change. Cell Phone Number opens.

3. For Cell Phone, enter the cell phone number that you want to use for notifications.
4. From **Cell Phone Carrier**, select the cell phone carrier that you use for cell phone service.

5. Click **Verify Cell Phone**. Allscripts FollowMyHealth™ sends you a validation code text message to your cell phone.

6. For **Validation Code**, enter the validation code that you received through text message.

7. Click **Verify Cell Phone**. The cell phone number is displayed for **Cell Phone**.

**Results of this task**

You added your cell phone number to **My Account > Preferences > Notification Preferences**. You also updated the cell phone number at **My Info > Demographics** and on **Goals**.

**Change your email address**

Notifications are sent to you through an external email address or cell phone. The email address that you added when you registered for an Allscripts FollowMyHealth™ account is displayed in the **Notification Preferences** tab, **Demographics**, and **Goals** when you accept a goal. You can change your email address from any of these locations.

This task has 9 steps.

1. From **Preferences**, click **Notification Preferences**. The **Notification Preferences** tab is displayed.

2. Click **Change** next to your current email address. **Email address** opens.

3. For **Email Address**, enter the new email address.

4. For **Confirm Email Address**, enter the email address again.

5. Click **Verify Email**. A verification email is sent to the email address that you entered.

   **Note:** If you did not receive the email, check your junk mail folder, ensure the email was entered correctly, and ensure that it is a valid email address. If you entered the email address incorrectly, repeat steps 2-5.

6. Log on to your email account and open the verification email from Allscripts FollowMyHealth™.

7. Click **Click here to verify your email address with FollowMyHealth**. Allscripts FollowMyHealth™ Patient Access **Log in** opens.

8. Log on to Allscripts FollowMyHealth™ Patient Access. Allscripts FollowMyHealth™ Patient Access opens and a window is displayed that confirms your email address is verified.

9. Click **OK**.
Results of this task
Your email address in My Account > Preferences > Notification Preferences is changed. Your email address is also updated at My Info > Demographics and on Goals.

Restore deleted information
If you delete information or providers from your Allscripts FollowMyHealth™ account, you can recover the deleted items from Restore Deleted Items in Preferences.

1. From Preferences, click Restore Deleted Items. Restore Deleted Items opens.

2. Click Restore to add deleted items back to your Allscripts FollowMyHealth™ account. The previously deleted item is removed from the list and can be found in the corresponding type window in My Health. For example, the result ANA SCREEN 2.3 5/22/2012 is listed in My Health > Results.

Results of this task
The deleted item is restored.

View activity history
Activity History Log in Preferences lists all of the activity in your Allscripts FollowMyHealth™ account.

From Preferences, click Activity History Log.
Activity History Log opens.

![Activity History Log](image)

**Figure 28: Activity History Log**

Set display preferences

You can change the way the Allscripts FollowMyHealth™ user interface is displayed, make alternative text available for images, and enable disclaimers on messages.

1. From **Preferences**, click **Display Preferences**. **Display Preferences** opens.
2. Select the preferences that you want to change.

**Accessibility Preferences**

Select **Display images of text** to control how the low, medium, and high graphic displays on **Results in My Health**.
Select **Display high-contrast theme** to change the color of the user interface to a high contrast resolution for the visually impaired.

**Unit Of Measure Preferences**

Select the type of unit of measure that you want your vital signs to display in: **English** or **Metric**.
Other Preferences

Select **Display message disclaimer** to open a disclaimer with each email message that you compose. If this preference is selected, **Emergency Message Disclaimer** opens each time you compose an email message.

3. Close **Preferences**.

Get technical support and assistance

Allscripts FollowMyHealth™ provides several ways to get technical assistance if you have issues working with the application or want to learn more.

1. Click **My Account > Support**.

Knowledge Base

This library provides articles about getting started with the product, frequently asked questions, security, problems and issues, using the product with mobile devices, and miscellaneous resources.

Product Feedback and Suggestions

This web page provides a forum where you can submit questions, feedback, and suggestions, and get replies from a technical support representative.

FollowMyHealth Video Walkthrough

This video tutorial provides a demonstration of the product. The video opens in English or Spanish, depending on the mode set on the Allscripts FollowMyHealth™ Patient Access static toolbar. If you switch to **Español** mode during the invitation acceptance process, the video automatically opens in Spanish. The video is also directly available on YouTube™ video community at [http://www.youtube.com/watch?v=SpypsjSy0rs](http://www.youtube.com/watch?v=SpypsjSy0rs).

**Note:** The features available to you are determined by your connected healthcare organizations. The video tutorial might cover options that are not currently available to you.
User Manual

The Allscripts FollowMyHealth™ Universal Health Record Patient Access User Guide is accessible from this link.

Support Information opens with links to several types of assistance.

2. To access Knowledge Base, click My Account > Help. Knowledge Base opens.

3. To access the Allscripts FollowMyHealth™ video walkthrough or user manual from Preferences, click My Account > Preferences. Preferences opens. The Video Walkthrough and User Manual links are displayed in the upper right.

Figure 29: Video Walkthrough and User Manual links on Preferences
Chapter 3 Static toolbar
Chapter 4

The Home tab

The **Home** tab is the first tab to display after you log in. You can compose a message, view your health summary, manage activities, appointments, billing, and applications from the **Home** tab.

**Health Summary**

The **Health Summary** section on the **Home** tab includes basic information about you, including age, gender, height, weight, body mass index (BMI), blood pressure, and primary insurance.

![Health Summary](image)

**Figure 30: Health Summary on the Home tab**

**Action Center**

The **Action Center** section on the **Home** tab notifies you of items that require your attention. You can view an **Action Center** list or a calendar view.
Figure 31: Action Center on the Home tab

Action Center

You have not connected to any healthcare providers!

You have 1 unread email in your mailbox.

Your health record contains new clinical items.

Reminder: Lipid Panel is overdue.

Action Center

Action items for patients that you are an authorized individual for are also listed on Action Center under the patient's name.

You can select any item from the Action Center list to expand the detailed section in Allscripts FollowMyHealth™ Patient Access. For example, select a clinical item from Updated Clinical Items and the clinical item opens as if you were in My Health. You can view the details from this window and print, fax, or email.
You can also launch InfoButton™ education without navigating to My Health or Know My Health.

The calendar view contains thumb tack icons to indicate appointments or events are scheduled. You can print, email, and export from the calendar view.

When you export your calendar view, the scheduled appointments are displayed in the calendar program on your desktop, such as Microsoft® Outlook.
Recent Activity

The **Recent Activity** section on the **Home** tab shows the most recent activity in your Allscripts FollowMyHealth™ account.

To remove items from **Recent Activity**, click the delete icon ✗ next to the item.
Appointments

You can view, request, schedule, reschedule and cancel in the **Appointments** section on the **Home** tab.

The **Appointments** section contains 3 tabs.
Figure 36: Appointments on the Home tab

Upcoming

This tab includes all future appointments that you have scheduled. You can view, reschedule, and cancel appointments from the **Upcoming** tab.

Past

This tab includes all past appointments.

Other

This tab includes all other appointments, such as canceled appointments or appointments that you did not show up for.

**Search** enables you to search the current tab by organization name or provider name. Click **Export** to export the appointments in a .ics file to your calendar.

**Request an appointment**

This task has 9 steps.

1. From the **Appointments** section, click **Request**.

   **Note**: You must have a relationship with at least 1 provider who has enabled online appointment requests. Otherwise, **Request** is unavailable.

   **Scheduling An Appointment** opens.
2. From **Appointment With**, select the provider, organization, and appointment type that you want. If you select an appointment type other than **Request Appointment**, your appointment is directly scheduled with the provider if the provider has direct scheduling enabled.

3. Enter the reason for the appointment in **Reason For Appointment**. Provide a short description of your health issue and reason for the visit. You are limited to 250 characters.

4. From **My Available Times**, select the box preceding the day of week that you want the appointment.
5. Select a time and availability.

6. Click **Add This Time Slot** for each appointment day and time selection. The appointment choices are listed in the box. You can add multiple appointment dates and times. You can remove choices by clicking the delete icon \( \times \) next to the list item.

![Figure 38: Appointment choices](image)

7. (Optional) Enter additional comments in **Comments**. You are limited to 250 characters.

8. Click **Submit**. A message is displayed to remind you that the requested appointment is not scheduled until the appointment is posted in your health record and the provider sends a confirmation email.

9. Click **OK**.

**Results of this task**
A secure message appointment request is sent to the provider that you specified.

**Directly schedule an appointment**
You can directly schedule an appointment with your provider if direct scheduling is enabled.

**Before you begin**
Your provider or organization must have direct scheduling enabled. You can determine that your provider or organization has direct scheduling enabled if there are appointment types listed in the **Appointment Type** drop-down list other than **Request Appointment**. If there are not appointment types listed other than **Request Appointment**, direct scheduling is not enabled.

This task has 8 steps.
1. From the **Appointments** section, click **Request**.
   
   **Note:** Your healthcare record must be connected to at least 1 provider that has enabled online appointment requests. Otherwise, **Request** is unavailable.

   **Scheduling An Appointment** opens.

   ![Scheduling An Appointment window](image)

   **Figure 39: Scheduling An Appointment window**

2. From **Appointment With**, select the provider, organization, and appointment type that you want.
Select an appointment type other than Request Appointment so that you are directly scheduling an appointment.

3. From Provider Instructions, review the provider’s instructions to assist you with the type of appointment to select. These instructions vary by organization.

4. Enter the reason for the appointment in Reason For Appointment. Provide a short description of your health issue and reason for the visit. You are limited to 250 characters.

5. From View Appointments After, select the starting day on the calendar that you want to find appointments and click Search. For example, if you select February 7, all available appointments on February 7 and after are displayed in Appointments Available. If no appointments are available on February 7, a red flag indicates the search results items that are different dates.

6. Select the appointment that you want or click View More to see more appointment options.

7. From Schedule An Appointment, click Submit. A message is displayed to confirm that you scheduled an appointment.

8. Click OK. A message is displayed to confirm that your appointment is successfully reserved.
Results of this task
You have reserved an appointment with your provider. The appointment takes a few minutes to post to your health record.

Important: If another patient simultaneously reserves an appointment for this time slot, you are notified that the time slot is no longer available, and you must select a new appointment time.

View upcoming appointments

Future appointments are listed in the Upcoming tab located in the Appointments section.

Your next 2 appointments are automatically listed. If you want to view an appointment that is scheduled for a later date, click View More.

1. To view appointment details, click the appointment in the list. Appointment Information opens.
The appointment information, such as date, time, and location, are displayed at the top of the tab, along with a provider photo, if available. A map and written directions are available if the appointment location is known. The directions are from your home address as known by the patient portal to the appointment location.

2. (Optional) To change the start or end address for directions, enter the new addresses in **Start** and **End** and click **Get Directions**.
You can automatically add the addresses by selecting **Use My Address** and **Use Appointment Address**.

A new map and directions are displayed.

3. (Optional) To print the map and directions, select **Directions** and **Map**, and click **Print**.

**Results of this task**
You have viewed appointment details and printed a map and directions to the appointment location.

**Reschedule an appointment**
You can reschedule appointments on the **Upcoming** tab located in the **Appointments** section.

1. Select an appointment from the **Upcoming** tab. **Appointment Information** opens.

2. Click the **Reschedule Appointment** tab. The **Reschedule Appointment** tab is displayed.
The organization and provider are automatically displayed based on the original appointment and cannot be changed. The reschedule appointment workflow is identical to the request appointment workflow.

A secure message is sent to your provider requesting to reschedule the appointment. It might take a day for the appointment to be removed from the Upcoming tab. A Pending Reschedule label is displayed with the appointment on the Upcoming tab until the appointment is confirmed.

**Figure 41: Reschedule Appointment tab**
Cancel an appointment

Cancel appointments on the **Upcoming** tab located in the **Appointments** section.

1. Select an appointment from the **Upcoming** tab. 
   **Appointment Information** opens.

2. Click the **Cancel Appointment** tab. 
   The **Cancel Appointment** tab is displayed.

![Pending Reschedule label](image)
3. Enter a reason in the comments box to explain why you want to cancel the appointment and click **Submit**. A **Pending Cancellation** label is displayed with the appointment on the **Upcoming** tab until the appointment is cancelled.
View past and other appointments

Past and other appointments are listed in the **Past** and **Other** tabs, located in the **Appointments** section.

1. Click the **Past** tab or **Other** tab.
2. To view appointment details, click the appointment in the list. **Appointment Information** opens where clinical details or documents associated with this appointment are displayed.
Figure 45: Clinical Details

3. (Optional) To print the appointment details, click **Print**.

**Results of this task**
You have viewed past or other appointments and printed the details.

**Billing**

The **Billing** section is only available on the **Home** tab if your organization has the online bill pay feature enabled.

The charges and amount due are displayed on the **Billing** section, and **Amount Due** is updated with the first log in of the day.
Figure 46: Billing on the Home tab

To make a payment, click Make a Payment and Patient Responsibility opens. Find the amount due in the list of invoices, and follow the steps as described in Manage Billing.

**App Center**

The App Center section on the Home tab provides access to applications that are installed on Allscripts FollowMyHealth™ and enables you to install more applications.

These applications integrate with Allscripts FollowMyHealth™ and capture data to post to your health record.

> My Charts
> Health Journal
> Know My Health
> Withings Digital Scale
> Blue Button®
> Telcare Glucose Monitor
> Withings Blood Pressure Cuff
> Blood Sugar
> iHealth® Labs

My Charts, Health Journal, and Know My Health are automatically installed for you when you create your account.

**Install applications**

1. From App Center on the Home tab, click Add Apps. App Store opens.
2. Click **Install** for the application that you want to add.
   The application automatically installs and is available in the browser. If you click **Uninstall**, the application is automatically removed and does not display when you browse your applications. There is no confirmation message.

**What to do next**

Each installed application is represented by a blue dash (--) icon. Point to the dash icon to display the application name. When you click on the icon, the application opens. Alternatively, use the backward and forward arrow icons to switch between applications.
Manage a Health Journal entry

Health Journal is an application that provides an online journal for notes about your health.

Important: Health Journal entries are never shared outside of your Allscripts FollowMyHealth™ account, but you can print them to share with your provider.

This task has 7 steps.

1. To add a journal entry, click New. A journal entry opens.

Figure 48: Health Journal entry

2. Enter a title and notes for the journal entry.
   
   Note: Journal entries are private. The provider cannot read your entries.

3. Click Save. The journal entries are posted on the main page of the Health Journal application. The journal entries are also viewable from the Home tab in the App Center section.
4. To view additional journal entries that are not displayed in App Center on the Home tab, click View More. Click the arrow on the journal entry to see the entry details and open the entry in Health Journal where you can edit, print, or delete the entry.

5. (Optional) To edit the entry, change the text or add more content to the entry and click Save.

6. (Optional) To print the journal entries to share with your provider, click Print.

7. (Optional) To delete a journal entry, click Delete. Click Yes to confirm that you want to delete the entry.

Manage My Charts data

The My Charts application automatically displays charts for weight, blood pressure, and the top most resulted item in your Allscripts FollowMyHealth™ account.

These charts are displayed by default provided that each item has more than 3 data points. If any of the automatically graphed items has less than 3 data points, the graph does not display.
If you add your own vitals at home, they are displayed the next time you log in.

This task has 8 steps.

1. From the **App Center** section on the **Home** tab, click the title of the graph that you want to view.

   ![My Charts](image)

   **Figure 50: MyCharts graph view**

   The chart expands.
2. (Optional) To print the chart, click **Print this Chart**.

3. (Optional) To modify the date range displayed in the chart, click the forward and back arrows for the start and end dates.

4. (Optional) To remove the chart from the My Charts application, click **Remove Chart**.

5. Click the graph title to return the graph back to the thumbnail size.

6. To add a chart, click **Add a Chart**.

   **Add a Chart to your Charts Widget** opens.
Figure 52: Add a Chart to your Charts Widget window

7. Select the type of data that you want to include in the chart. You can add any result type or vital sign that has more than 3 data points that can be graphed. You can also select more than 1 item for a single chart. **Chart Name** is automatically added by the application, based on the items that you selected.

8. Click **Add this Chart**. The new chart is added to the My Charts application and is listed in the **App Center** section.
Set up a Withings digital scale

The Withings Digital Scale application provides a link between Allscripts FollowMyHealth™ and your personal Withings digital scale. You can weigh yourself and the data automatically uploads to Allscripts FollowMyHealth™.

Before you begin
You must purchase a Withings digital scale and connect it to Allscripts FollowMyHealth™. Click Purchase a Withings Body Scale to be directed to an online retailer where you can purchase the scale. Or, purchase your scale through another retail source.

1. From App Center on the Home tab, go to the Withings Digital Scale application.

2. Click Connect a Withings Body Scale.
   You are directed to the Withings website where My Withings account opens.
   If you do not have an account, click Create your account for free within a few minutes. Register opens where you can create an account.

3. Log on with the user name and password that you created when you created your Withings account. Authorize FollowMyHealth opens.

4. Follow the steps provided by the Withings web page to connect your scale.

Results of this task
The Withings digital scale is connected to the Allscripts FollowMyHealth™ Withings Digital Scale application.
Set up a Withings blood pressure monitor

The Withings Blood Pressure Monitor application provides a link between Allscripts FollowMyHealth™ and your personal Withings blood pressure monitor. You can take your blood pressure and the data automatically uploads to Allscripts FollowMyHealth™.

Before you begin
You must purchase a Withings blood pressure monitor and connect it to Allscripts FollowMyHealth™. From App Center, click Purchase a Withings BP Monitor to be directed to an online retailer where you can purchase the monitor. Or, purchase your monitor through another retail source.

1. From App Center on the Home tab, go to the Withings Blood Pressure Monitor application.

![Withings Blood Pressure Monitor application in App Center](image)

Figure 54: Withings Blood Pressure Monitor application in App Center

2. Click Connect a Withings BP Monitor. You are directed to the Withings website where My Withings account opens.

   If you do not have an account, click Create your account for free within a few minutes. Register opens where you can create an account.

3. Log on with the user name and password that you created when you created your Withings account. Authorize FollowMyHealth opens.

4. Follow the steps provided by the Withings web page to connect your blood pressure monitor.

Results of this task
The Withings blood pressure monitor is connected to the Allscripts FollowMyHealth™ Withings Blood Pressure Monitor application.
Download your health data with Blue Button

Use the Blue Button® application to download your medical information into a file that is recognized by the majority of applications used by care providers.

1. From **App Center** on the **Home** tab, navigate to the Blue Button® application.

![Blue Button application in App Center](image)

2. Click **Download My Data**. **Disclaimer** opens.

3. Click **Yes** to accept the disclaimer. You must accept the disclaimer before proceeding. This disclaimer states that you are responsible for sending your medical information outside of Allscripts FollowMyHealth™. **Download My Data** opens.

4. From **Step1: Select File Type**, select the type of file that you want your data to be packaged in and click **Download**. The following file types are available:

**Plain Text File**

This option creates a file of your entire Allscripts FollowMyHealth™ record in a format that is easy to read.

**CCDA File**

Some healthcare organizations might request your information in this file format.

**HTML File**

Some healthcare organizations might request your information in this file format.
The results of the download can vary depending on the browser that you are using, but you must click **Save As** to save the file to your desktop.

**Results of this task**

Your health information is downloaded and saved, and you can share the data with your healthcare provider.

**Enter a blood sugar reading**

Use the Blood Sugar application to manually enter your blood glucose reading in Allscripts **FollowMyHealth™**.

This task has 7 steps.

1. From **App Center** on the **Home** tab, go to the Blood Sugar application.
2. For **Date Taken**, enter the day that the reading was taken. You can use the calendar view to select your date.

3. Enter the time of day that the reading was taken and select **AM** or **PM**.

4. For **Glucose**, enter the blood glucose reading value.

5. For **Tag**, select when the blood glucose reading was taken. Such as, before a meal, before bed time, before an activity, and so on.

6. Click **Save**. A window opens with the message **Blood Sugar result saved**.

7. Click **OK**.
Results of this task
The reading is sent to My Health > Results.

Set up a Telcare blood glucose meter
The Telcare Blood Glucose Meter application provides a link between Allscripts FollowMyHealth™ and your personal Telcare blood glucose meter. You can take your blood glucose reading, and the data automatically uploads to Allscripts FollowMyHealth™.

Before you begin
You must purchase a Telcare blood glucose meter and connect it to Allscripts FollowMyHealth™. From App Center, click Purchase a Telcare Blood Glucose Meter to be directed to an online retailer where you can purchase the monitor. Or, purchase your monitor through another retail source.

1. From App Center on the Home tab, go to the Telcare Blood Glucose Meter application.

![Telcare Blood Glucose Meter application in App Center](image)

2. Click Connect a Telcare Blood Glucose Meter. You are directed to the Telcare web page.

3. Log on with the user name and password that you created when you created your Telcare account.

4. Follow the steps provided by the Telcare web page to connect your blood glucose meter.
Results of this task
The Telcare Blood Glucose Meter is connected to the Allscripts FollowMyHealth™ Telcare Blood Glucose Meter application.

Set up an iHealth Account Connection
Use the iHealth® Account Connection application to access weight, blood pressure, and blood glucose measurements from your Allscripts FollowMyHealth™ Patient Access account.

You can also access the iHealth® Store from Allscripts FollowMyHealth™ Patient Access to purchase an iHealth® device.

1. From App Center on the Home tab, go to the iHealth Account Connection® application.

   ![iHealth® Account Connection](image)

   Figure 58: iHealth Account Connection application in App Center

2. Click Connect to your iHealth account.
   iHealth Labs Login opens.
   Follow the instructions from the iHealth® web page to complete the connection.

Know My Health
Know My Health is an enforced application in App Center that exists for all patients with a Allscripts FollowMyHealth™ account. Know My Health provides patient education materials from MedlinePlus that can be printed or emailed.

Know My Health includes a search tool that searches matches by name only, not article content. You can also filter Know My Health by education type, such as Conditions, Medications, or Results. When you click an item in the Know My Health application, associated education content from MedlinePlus opens.
## Device list

Wireless devices, such as weight scales, blood pressure cuffs, and blood glucose monitors, enable you to automatically import weight, blood pressure, and glucose readings into Allscripts FollowMyHealth™ Patient Access.

Each device has an application in **App Center** that integrates the device with Allscripts FollowMyHealth™ Patient Access.

<table>
<thead>
<tr>
<th>Device</th>
<th>Features</th>
<th>Allscripts FollowMyHealth integration</th>
<th>More information</th>
</tr>
</thead>
<tbody>
<tr>
<td>iHealth® Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled Measures blood pressure Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
<td><img src="http://www.ihealthlabs.com/blood-pressure-monitors/wireless-blood-pressure-wrist-monitor/" alt="link" /></td>
</tr>
<tr>
<td>iHealth® Labs Wireless Blood Pressure Wrist Monitor</td>
<td>Bluetooth-enabled Measures blood pressure Measures pulse</td>
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</tr>
<tr>
<td>iHealth® Labs Wireless Blood Pressure Monitor</td>
<td>Bluetooth-enabled Measures blood pressure Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
<td><img src="http://www.ihealthlabs.com/blood-pressure-monitors/blood-pressure-dock/" alt="link" /></td>
</tr>
<tr>
<td>iHealth® Labs Blood Pressure Dock</td>
<td>Connects to iPhone®, iPad®, and iPod® Measures blood pressure Measures pulse</td>
<td>Blood pressure readings are imported into FollowMyHealth</td>
<td><img src="http://www.ihealthlabs.com/wireless-scales/wireless-body-analysis-scale/" alt="link" /></td>
</tr>
<tr>
<td>iHealth® Labs Wireless Body Analysis Scale</td>
<td>Wi-Fi-enabled Measures weight, body fat, body water, visceral fat, body muscle mass, and bone mass</td>
<td>Weight and BMI readings are imported into FollowMyHealth</td>
<td><img src="http://www.ihealthlabs.com/wireless-scales/wireless-scale/" alt="link" /></td>
</tr>
<tr>
<td>iHealth® Labs Wireless Scale</td>
<td>Bluetooth-enabled Measures weight Measures pulse</td>
<td>Weight and BMI readings are imported into FollowMyHealth</td>
<td><img src="http://www.ihealthlabs.com/support/blood-pressure-monitors/blood-pressure-dock/" alt="link" /></td>
</tr>
<tr>
<td>Device</td>
<td>Features</td>
<td>Allscripts FollowMyHealth integration</td>
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<tr>
<td>iHealth® Labs iHealth Align</td>
<td>Attach to Android™ or Apple® devices</td>
<td>Blood glucose readings imported into FollowMyHealth</td>
<td><a href="http://www.ihealthlabs.com/ihealth-align/">http://www.ihealthlabs.com/ihealth-align/</a></td>
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<tr>
<td></td>
<td>Measures weight</td>
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<td></td>
<td>Calculates BMI</td>
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<td></td>
<td>Calculates body fat percentage</td>
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<td></td>
<td>Measures pulse</td>
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<td></td>
<td>Monitors ambient temperature</td>
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<td></td>
<td>Monitors ambient CO2 levels</td>
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<td></td>
<td>Measures weight</td>
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<td>Calculates BMI</td>
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<td>Measures blood pressure</td>
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<td>Measures pulse</td>
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<td></td>
<td>Measures blood glucose</td>
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</tbody>
</table>

Table 1: Devices supported by Allscripts FollowMyHealth
Chapter 5

Inbox

The Inbox tab contains all of the secure messages you have sent to and received from organizations that are connected to your universal healthcare record account.

The number of new messages in the Inbox tab is displayed on the Inbox tab. By default, the Inbox tab contains Inbox, Sent, and Trash folders. You can create folders, nest multiple folders, and edit existing folders.

Common options, such as Forward and Reply, are available, but the provider that you want to forward messages to or who you want to reply to must have these options enabled. You can also print, move, and delete messages.
Compose email messages

Important: Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window opens with the message "You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send?" opens after you click Send.

This task has 5 steps.

1. Click the Inbox tab. Inbox opens.

2. Click Compose. Emergency Message Disclaimer opens each time you compose a message. If you want to turn off the disclaimer, select Do not show this message again. Or, you can turn off all message disclaimers in My Account > Preferences > Display Preferences and clear Display message disclaimer.

3. Enter the email recipient, subject, and message.

4. Click Send. If you are emailing a form, a window opens to inform you that you cannot change the form after it is emailed.

5. Click Send.
Create and edit inbox folders

This task has 7 steps.

1. Click the **Inbox** tab.
   - **Inbox** opens.

2. Click **Add Folder**.
   - **Create New Folder** opens.

3. Enter the name of the folder in **What would you like to name this folder**.

4. Click **OK**.
   - The new folder is listed under the **Inbox** folder on the left.

5. To edit a folder, click **Edit Folder**.
   - You can delete, rename, or move the folder.

6. Select the folder that you want to edit.
   - The edit controls display.

7. Click **Done**.
Chapter 6

My Health

The My Health tab contains all the information about your healthcare, including conditions, medications, allergies, immunizations, test results, vitals, documents, and your medical chart.

You can view all sections of My Health on the Summary tab, or, you can go to each section by clicking the section tab or selecting the section from the My Health tab menu.

To print the information from the tab that you are currently on, click Print. To print all tabs at 1 time, click Print All from the Summary tab. You can also email the information on 1 tab by clicking Email, or all tabs, by clicking Email All.

Summary

The Summary tab on My Health provides a current snapshot of your active medical information.

The Summary tab can be printed so that you have a hard copy of your current health information to share with your provider, carry with you in case of an emergency, or keep on file at your home. You can also directly email or fax your summary.

You can also import or export your health record file or clinical documents to or from your universal health record (UHR).
Demographics

Displays your picture, name, date of birth, and address. This information is collected from the My Info tab. To change your picture, click New Photo.
My Care Team

Add your primary providers to the care team list. The list includes the name of your provider, a note about the provider or nurse specialty, and contact information.

Diagnoses

Displays all active conditions from the Conditions tab of My Health.

Surgical History

Displays all surgical history conditions from the Conditions tab of My Health.

Allergies

Displays all active allergies from the Allergies tab of My Health.

Medications

Displays all active medications from the Medications tab of My Health.

Recent Vitals

Displays the most current value, if any, for height, weight, and body mass index (BMI).

Manage your care team list

My Care Team list on the Summary tab, provides a quick contact list of your most frequently used healthcare providers.

The list is always available on the Summary tab and you can print the list to carry with you in case of emergency or to share with your other providers. You can also remove providers from the list and edit the provider information.

Note: Your participating providers can be viewed at My Info > Providers. My Care Team is intended as a quick reference to healthcare providers.

This task has 8 steps.

1. From My Health, click the Summary tab.
   The Summary tab is displayed.

2. Click Add Provider.
Add Preferred Provider opens.

3. Enter the provider's name, information that distinguishes the provider from other providers, and the contact information.

4. Click Save.
The provider is listed in My Care Team.

5. To delete a provider from My Care Team, click \( \times \).
A message opens asking you to confirm that you want to delete the provider.

6. Click Yes.

7. To edit the provider information, click \( \text{EDIT} \).
Add Preferred Provider opens.

8. Edit the information and click Save.

Export health summary documents
You can download or electronically transmit your health summary documents.

This task has 5 steps.

1. From My Health, click the Summary tab.
The Summary tab is displayed.

2. Click Export.
Export/Download your Health Record opens.
3. For **Export Type**, select if you want to download or transmit your document.
   - **Download**: Specifies that you want to download your file to your computer or other storage device. This is the default export type. If you select **Default**, you can download the file as a Consolidated-Clinical Document Architecture (C-CDA) XML file, an HTML file, or a Plain Text file (human readable format).
   - **Transmit**: Specifies that you want to electronically send your document to a third party provider. If you select **Transmit**, you must select the type of file format: **Send Plaintext** or **Send CCD**, and enter the **Direct Address**.

   **Important**: A Direct Address is a specialized communication method used by healthcare providers. If you do not know your provider's Direct Address, be aware that attempting to transmit to a regular email address does not work. To send data from **My Health** to an email address, use the **Email** tool from any of the **My Health** windows.

4. For **Select the record you would like to export from the drop down list**, select the document that you want to export. You can export your entire health record or clinical summary documents, such as ambulatory or inpatient C-CDA documents in your record.

5. Click **Export**.
Results of this task
Your document is exported.

Import health summary documents
You can import a health summary document to Allscripts FollowMyHealth™.

1. From My Health, click the Summary tab. The Summary tab is displayed.
2. Click Import. Import/Upload your Health Record opens.

![Figure 65: Import/Upload your Health Record window](image)

3. From Choose File, browse for the file that you want to import.
4. Click Import.

Results of this task
Your document is imported.
Conditions

Conditions are known problems or diagnoses. Allscripts FollowMyHealth™ tracks active conditions, past medical history, surgical history, family health considerations, and personal health considerations.

The Conditions tab on My Health lists all of your conditions.

Each condition type is organized in a section. When you add a condition, you designate a type, such as Surgical History, and the condition is added to that section. The sections can be expanded and collapsed. The number of conditions in the section are displayed in parentheses next to the section title.

To view education information about a condition, click in the Education column. Specific and easy-to-read education information from the National Institute of Health and the National Library of Medicine opens.

A green check mark in the New column identifies the condition as new.

Add an active condition

Active conditions are health conditions that are ongoing problems.

This task has 7 steps.
1. From the **Conditions** tab on **My Health**, click **Add Condition**. **Add Health Condition** opens.

2. For **Type**, select **Health Condition**.

3. For **Name**, type the name of the condition
   When you enter the name, a list of conditions are displayed. You can select 1 of these conditions.

4. For **Status**, select **Active**.
   If a provider entered a resolved condition, select **Resolved** for **Status**. You must then enter a date when the issue was resolved.
   If a provider entered a condition that is not applicable, select **Denied**. Items that are resolved are displayed in the **Past Medical History** section.

5. For **Comments**, enter related comments.

6. Click **Save**.
   **Confirm Add** opens.

7. Click **Yes**.
   The condition is listed under **Active**.

---

**Add a surgical history condition**

Surgical history conditions are health conditions that are related to surgical procedures.

This task has 10 steps.

1. From the **Conditions** tab on **My Health**, click **Add Condition**. **Add Health Condition** opens.

2. From **Type**, select **Surgical History**.

3. Enter the name of the condition in **Name**.
   When you the name, a list of conditions are displayed. You can select 1 of these conditions.

4. Select a status from **Status**.
   - **Resolved**
     - Specifies that this is a past surgery.
   - **Denied**
     - Specifies that you did not have this surgery.

5. Enter the date of the surgery in **Procedure Date**.
6. Enter the name of the provider that performed the surgery in Provider.
7. Enter related comments in Comments.
8. For Comments, enter related comments.
9. Click Save. Confirm Add opens.
10. Click Yes.
    A surgical history is added.

Add a family health condition

Family health conditions are conditions and issues that your family members have that you are at risk for. As a general rule, healthcare providers are only interested in family health conditions for blood relatives.

If a patient is adding a family health condition to his or her family health history, and he or she has authorized individual access to other patients that are family members, the patient can update the family members' health history at the same time.

This task has 10 steps.

1. From the Conditions tab on My Health, click Add Condition. Add Health Condition opens.
2. From Type, select Family Health Condition.
3. Enter the name of the condition in Name.
    When you type the name, a list of conditions are displayed. You can select 1 of these conditions.
4. Select a status from Status.

**Active**

Specifies a condition that is currently a problem for a family member.

**Resolved**

Specifies a condition that a family member has had but no longer has.

**Denied**

Specifies a condition that should not be included in your family history.

5. Enter the relationship of the family member in Relationship.
6. Enter related comments in **Comments**.
7. Click **Save**.
   If you are a proxy, **Family Health Condition** opens. The patients that you are an authorized individual for are displayed in the window. Select family members that the health condition also applies to.

![Family Health Condition window](image)

**Figure 67: Family Health Condition window**

8. For **Comments**, enter related comments.
9. Click **Save**.
   **Confirm Add** opens

10. Click **Yes**.
    The condition is listed under **Family Health Conditions** for you and the family members that you are an authorized individual for.

---

**Add a personal health condition**

Personal health conditions include smoking status, exercise habits, drug use, or living habits.

This task has 7 steps.

1. From the **Conditions** tab on **My Health**, click **Add Condition**.
Add Health Condition opens.

2. For Type, select Personal Health Condition.
3. For Name, type the name of the condition
   When you enter the name, a list of conditions is displayed. You can select 1 of these conditions, or enter your own.
4. For Status, select Active.

Active

Specifies an issue that is currently active.

Resolved

Specifies an issue that used to be active, but is no longer active.

Denied

Specifies an issue that must not be included in your personal health condition history.

5. For Comments, enter related comments.
6. Click Save.
   Confirm Add opens.
7. Click Yes.
   The condition is listed in Conditions.

Medications

Allscripts FollowMyHealth™ lists all active, completed, discontinued, declined, and temporary deferral medications.

From the Medications tab on My Health you can add, delete, and edit medications, request a renewal, and add a preferred pharmacy.
Each medication is displayed in a section. Medications are categorized by status, including Active, Unknown, TemporaryDeferral, Declined, and Complete. You can expand and collapse the sections. The number of medications in each section is displayed in parentheses next to the section title.

To view education information about a medication, click the information icon in the Education column. Specific and easy-to-read education information from the National Institute of Health and the National Library of Medicine opens.

A green check mark in the New column identifies the medication as new.

### Add a medication

This task has 8 steps.

1. From the Medications tab on My Health, click Add Medication. Add Medication opens.
2. For Name, enter the name of the medication. When you enter the name, a list of medications is displayed. You can select 1 of these medications, or enter your own.
3. For Directions, enter the directions provided by the provider, or how you take your medication.
4. From Status, select the status that applies to the medication.
Active

Specifies a medication that you are currently taking.

Complete

Specifies a medication that you have finished, such as an antibiotic.

Discontinued

Specifies a medication that your provider has asked you to stop taking or is discontinued.

Unknown

Specifies a medication that does not fit in the other categories provided.

Declined

Specifies a medication that the provider added that you declined to take.

On Hold

Specifies an added medication that is on hold until your provider confirms the medication. This medication is added under the TemporaryDeferral section.

5. For Provider, enter the provider who prescribed the medication.
6. For Comments, enter related comments.
7. Click Save.
   Confirm Add opens.
8. Click Yes.
   The medication is listed in Medications.

Add a pharmacy

1. From the Medications tab on My Health, click Edit under Preferred Pharmacy. Pharmacy Search opens.
2. For **Search**, enter the ZIP Code of or near the pharmacy. By default, your ZIP Code is displayed when **Pharmacy Search** opens. You can change the value.

3. For **Distance in Miles**, select the proximity in miles that you want the application to search. Allscripts FollowMyHealth™ searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.

4. Select a pharmacy and click **Connect**. The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy**.

---

**Figure 69: Pharmacy Search window**
Request a medication renewal

You can request a prescription renewal for a medication if the provider who prescribed that medication has enabled online requests. If you use the online request, there is no need to call the office to request the renewal.

If you need a prescription refill, notify the pharmacy. Online renewal requests must only be used when you are out of refills.

This task has 6 steps.

1. From My Health, click the Medications tab. The Medications tab is displayed.

2. In the medication that you want to renew, click . Renew Prescription opens.
3. Select the provider who prescribed the medication to you from Provider. You can only request a renewal from a provider who has prescribed this medicine for you in the past. By default, the last provider who wrote the prescription for you is displayed in Provider. Prescription and Medication Info are also filled by default and cannot be changed.

4. (Optional) To change the pharmacy where the renewal is filled, click Change in Pharmacy Location. By default, your preferred pharmacy is listed in Pharmacy Location.

Attention: If you change the pharmacy during the renew prescription action, the alternate pharmacy is only applied to this specific renewal request. Use this option
if you use a separate pharmacy for some medications, such as a mail order pharmacy used only for ongoing prescriptions.

5. For Comments, enter any comments that you want your provider to know about the request.
6. Click Send. Your provider receives an electronic request to refill the prescription.

Allergies

Allscripts FollowMyHealth™ lists all active, resolved, denied, and inactive allergies. From the Allergies tab on My Health, you can add, delete, and edit allergies.

![Figure 71: Allergies tab](image)

Allergies are categorized by status, including Active, Inactive, Unknown, Denied, and Resolved. You can expand and collapse the sections. The number of allergies in each section is displayed in parentheses next to the section title.

**Add an allergy**

This task has 9 steps.

1. From the Allergies tab on My Health, click Add Allergy.
Add Allergy opens.

2. From Allergy Type, select an allergy type.

Medication

Specifies that you have an allergy to a medication.

Environmental

Specifies that you have an allergy to items in your environment, such as pets, trees, or dust.

Food

Specifies that you have an allergy to certain food types.

Unknown

Specifies that you do not know what type of allergy you have.

3. For Name, enter the name of the allergy.

When you enter the name, a list of allergies is displayed. You can select 1 of these allergies, or enter your own.

4. From Status, select the status that applies to the allergy.

Active

Specifies an active allergy or an allergy you currently have.

Inactive

Specifies an allergy that you might still have, but it is not currently an issue for you.

Resolved

Specifies an allergy that you no longer have.

Denied

Specifies that you know you do not have a known allergy. It is important that non-allergy specifics are added to your health record so that providers know that they can give you a certain medication or use latex.

5. (Optional) For Onset, enter the date that you first became aware of the allergy.
6. For **Allergic Reaction**, enter what kind of reaction you experience when exposed to the item, such as rash or nausea, and click 🔄. The reaction is displayed in **Allergic Reactions**.

7. For **Comments**, enter related comments.
8. Click **Save**. **Confirm Add** opens.
9. Click **Yes**. The allergy is listed in **Allergies**.

**Immunizations**

Allscripts FollowMyHealth™ lists all active, resolved, declined, on hold, and unknown immunizations. From the **Immunizations** tab on **My Health** you can add, delete, and edit immunizations.
Immunizations are categorized by status, including Active, Declined, Unknown, and OnHold. You can expand and collapse the sections. The number of immunizations in each section is displayed in parentheses next to the section title.

**Add an immunization**

This task has 9 steps.

1. From the **Immunizations** tab on **My Health**, click **Add Immunization**. **Add Immunization** opens.

2. For **Name**, enter the name of the immunization. When you enter the name, a list of immunizations is displayed. You can select 1 of these immunizations, or enter your own.

3. For **Administered Date**, enter the date that you received the immunization.

4. (Optional) For **Series**, enter the series number of the immunization. **Series** is only required if this immunization is an immunization in a series of 2 or 3 shots.

5. For **Status**, select the status that applies to the medication.

**Active**

Specifies an immunization that you have received.
**OnHold**

Specifies an immunization that you must receive but cannot receive at this time.

**Declined**

Specifies an immunization that you were offered that you declined.

6. For Provider, enter the name of the provider who administered the immunization.
7. For Comments, enter related comments.
8. Click Save.
   Confirm Add opens.
9. Click Yes.
   The immunization is listed in **Immunizations**.

**Results**

Allscripts FollowMyHealth™ lists lab results, radiology results, or any other results if your provider who ordered the tests has enabled the results to be viewed online.

From the Results tab on My Health you can add, delete, and edit results, as well as generate graphs to display historical results.

![Figure 73: Results tab](image)

Each result that is added is listed in its own section. You can expand and collapse the sections. The number of results in each section is displayed in parentheses next to the section title. A section that has 3 or more results or data points, can be displayed in a graph.

To view education information about a result, click i in the Education column. Specific and easy-to-read education information from the National Institute of Health and the National Library of Medicine opens.

A green check mark in the New column identifies the result as new.
Add a result

This task has 9 steps.

1. From the Results tab on My Health, click Add Result. Add Result opens.
2. From Name, enter the name of the result. When you enter the name, a list of test results is displayed. You can select 1 of these results or enter your own.
3. For Result Date, enter the date that you learned the results.
4. For Value, enter the actual result.
5. For Provider, enter the provider who ordered the test.
6. For Units, enter the units from the test result. For example, enter mmHg for blood pressure.
7. For Comments, enter related comments.
8. Click Save. Confirm Add opens.
9. Click Yes. The result is listed under result type.

Graph results

You can graph results that contains 3 or more results or data points.

1. From My Health, click the Results tab. The Results tab is displayed.
2. In the result that you want to graph, click . My Charts opens.
Point to the data points to display the result numbers for that data point.

3. Click Print this Chart to print the chart, or click Pin to your Charts to save the graph in the My Charts application in App Center on the Home tab.

**View results**

There are 2 ways to view your results, depending on the type of results.

1. From My Health, select the Results tab.
   The Results tab is displayed.
   Results that are numerical are contained in the Range column, with a visual representation of where the values lie within a range (low, normal, and high). Range information is provided only if the provider sent this information with your results.
The **Range** column is empty for text-based results that are non-numeric, such as for pathology and radiology.

Most numeric results from your provider have an associated reference range of normal values. You can view the range by pointing to the graphic in the **Range** column or by printing the result.

**Important:** When researching reference ranges, be aware that high and low values can be slightly different between lab facilities. The reference ranges displayed to you in your universal health record (UHR) come directly from your provider’s electronic health record (EHR). The results range that is displayed to you is an accurate representation of what is considered low and high using the standards employed by your healthcare organization.

2. To view text-based results, click ![image].
   The result detail window opens.
Vital signs

Allscripts FollowMyHealth™ lists vital signs, if your provider who took the vital signs has enabled the results to be viewed online.

From the Vital tab on My Health you can add, delete, and edit vital signs, as well as generate graphs to display historical vital sign results.
Figure 77: Vitals tab

Each vital sign that is added is listed in its own section. You can expand and collapse the sections. The number of vital signs in each section is displayed in parentheses next to the section title. A section that has more than 3 data points or results can be displayed in a graph.

Add a vital sign

This task has 7 steps.

1. From the **Results** tab on **My Health**, click **Add Vital**. **Add Vital** opens.

2. From **Type**, enter the type of the vital sign. When you enter the type, a list of vital sign types is displayed. You can select 1 of these types.

3. For **Date Taken**, enter the date that the vital sign is taken.

4. For **Value**, enter the vital sign reading.

5. For **Comments**, enter related comments.

6. Click **Save**. **Confirm Add** opens.

7. Click **Yes**. The vital sign is listed under the vital sign type.
Documents

Allscripts FollowMyHealth™ lists documents such as release forms you have signed, office visit documents, notes, and other documents related to your health record.

From the Documents tab in My Health, you can add your own documents and view documents added by your provider.

![Figure 78: Documents tab]

When new documents are posted to your account, the number of new documents is displayed on the Documents tab in My Health. When you select the Documents tab, the new items are indicated with a check mark.

When you complete and send back an electronic form that you received from your provider, the form is added to the Documents tab. If you are connected to a virtual organization, you receive a release of information form for any child organization that you are connected to.

**Important:** Forms cannot be changed after they are emailed to providers. If you are sending a form to a provider, a window opens with the message *You will not be able to make changes to this form after sending to your Provider. Are you sure you want to send?*.

Add a document

You can upload .jpeg, .png, .txt, and .pdf document file types.

If you try to upload a document type that is not supported, a warning message is displayed.
This task has 7 steps.

1. From the Documents tab on My Health, click Add Document. Add Document opens.
2. For Name, enter the name of the document.
3. For Date, enter the date that the document was created.
4. For Provider, enter the provider that the document is from.
5. Click Choose File to browse your computer for the document.
   a) Select the file and click Open.
      The document is listed under Files to Upload.
6. Click Save.
7. Click to view your document.
   The document details open.

---

**Note:** Printing, emailing, and faxing patient-uploaded .txt files is currently not supported.
Results of this task
The document is added to the Documents tab.

Chart

Search from the Chart tab to find a particular item by date or provider in Allscripts FollowMyHealth™.

All information from My Health can be viewed in the Chart tab. View all clinical items from your record sorted by date, such as the date when the item was first filed to your electronic health record (EHR) or by provider, such as the provider who is associated to each item in the EHR.

1. From My Health, click the Chart tab.
2. From **Sort By**, select **Provider** or **Date**.
   The chart items are listed to the left.

3. Click a chart item to open in the right pane.
   You can print or email the information.

### Goals

Your care provider can set health goals for you to achieve from home, for example "Lose 10 pounds in 3 months" or "Maintain a blood pressure under 140/90 for the next 30 days". These goals are displayed on the **Goals** tab in Allscripts FollowMyHealth™ Patient Access where tools are provided to help you reach your goal. The number of unaccepted goals is displayed on the **Goals** tab until you accept or decline the new goals.

Wireless blood pressure monitors, blood glucose monitors, and wireless scales can be leveraged to automatically send data related to these goals to Allscripts FollowMyHealth™ Patient Access. These devices make it easy for you to follow your care plan. You can also manually enter these readings if you do not have a wireless device.

Each goal has rules specific to your condition. These rules are set when your provider creates the goal for you. Data related to the goal is analyzed against these rules.

Goals are organized by status.

**New**

If you have a new goal, a message is displayed on the **Goals** tab. You must accept or decline the goal to proceed with the goal. Notifications can be sent to the ordering provider if you do
not respond to the new goal after a certain time period, based on rules set by your provider when the goal was created.

Active

The goal is listed under **Active Goals** when you accept the goal and you are actively collecting readings. Notifications can be sent to the ordering provider if your readings violate rules specific to the goal or if readings are not recorded based on the rules set by your provider. Results are also filed if a notification is triggered.

Completed

Completed goals are listed under **Completed Goals**. The goal is completed automatically when the goal is reached or the end date has passed. Final results are sent to the electronic health record (EHR) and the provider can view the results. Notifications are no longer triggered and readings are no longer captured for completed goals.

Declined

Goals that you refuse to follow are listed in **Declined Goals**. You have the option to decline a goal when it is new or active. Your provider receives a notification if the goal is declined. Notifications are no longer triggered and readings are no longer captured for declined goals.

Cancelled

If a goal is cancelled by your provider, the goal is moved to **Cancelled Goals**. Notifications are no longer triggered and readings are no longer captured for cancelled goals.

**Weight management goal**

The weight management goal is used to set a goal for weight gain or loss for a patient with obesity, bulimia, or anorexia.

The following list includes best practices when managing your weight management goals.

> Readings are entered manually or with a Withings digital scale. The Withings scale automatically sends the reading to Allscripts FollowMyHealth™ Patient Access.
> Only weights from your Withings scale or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.
> The graph data point tooltip includes the reading, body mass index (BMI), and patient-entered comments.
The progress is displayed as follows:

- The first reading on the goal is used to calculate the target weight based on the weight set in the goal. The goal start and end dates are displayed in the header.
- **Last Reading** specifies the last weight reading and the current BMI.
- **Target Weight** specifies the target weight.
  - The target weight is the green horizontal line.
  - The initial weight is the red horizontal line.
  - The blue line is the weighted average of all the readings and displays how the patient is trending.

- The progress indicator shows your progress towards reaching your goal. It indicates how much your weight has changed and the percentage of the goal completed.

- The Withings digital scale is set up in **App Center**. For more information, see *Set up a Withings digital scale*.

- You can connect to your Withings digital scale from a weight management goal in the **Goals** tab. Click **Connect to a Withings Scale** from the goal. When the scale is added, **Connect to a Withings Scale** is no longer displayed.

- Every reading added on the **Vitals** tab in **My Health** is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.
Monitor blood glucose goal

The monitor blood glucose goal is used to monitor blood glucose levels for patients with diabetes.
The following list includes best practices when managing your monitor blood glucose goals.

> Readings are entered manually from the goal or electronically with a Telcare Blood Glucose Meter. The Telcare Blood Glucose Meter automatically sends the reading to Allscripts FollowMyHealth™ Patient Access.

> The graph data point tooltip includes the reading, date, time, tag, patient-entered comments, and any broken rules.

> Telcare Blood Glucose Meter is set up through App Center. For more information, see Set up a Telcare Blood Glucose Meter.

> You can connect to your Telcare Blood Glucose Meter from a goal in the Goals tab. You can also click Connect to a Telcare Blood Glucose Meter from the goal. When the monitor is added, Connect to a Telcare Blood Glucose Meter is no longer displayed.

> If a blood glucose reading is added to the Results tab in My Health and the reading date is within the goal period, the reading is also added to the Goals tab.
Figure 83: Monitor blood glucose data in graph format
Monitor blood pressure goal

The monitor blood pressure goal is used to monitor blood pressure levels for patients with hypertension.

The following list includes best practices when managing your monitor blood pressure goals.

- Systolic and diastolic values are connected by a line in the graph view to indicate that the values are from the same reading. The top horizontal line is the systolic goal and the bottom horizontal line is the diastolic goal.
- Readings are entered manually or with a Withings Blood Pressure Monitor. The Withings monitor automatically sends the reading to Allscripts FollowMyHealth™ Patient Access.
- The graph data point tooltip includes the value, date, time, patient-entered comments, and any broken rules.
- Withings Blood Pressure Monitor is set up through App Center. For more information, see Set up a Withings blood pressure monitor.
You can connect to your Withings monitor from a blood pressure goal in the **Goals** tab. Click **Connect to a Withings Blood Pressure Monitor** from the goal. When the scale is added, **Connect to a Withings Blood Pressure Monitor** is no longer displayed.

If you add a blood pressure reading to the **Vitals** tab in **My Health**, the reading is automatically added to the **Goals** tab provided the date of the measurement is within the goal period.

---

**Figure 85: Monitor blood pressure data in graph format**

**Figure 86: Monitor blood pressure data in table format**

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**Monitor weight goal**

The monitor weight goal is used to monitor weight changes in patients with congestive heart failure.

The following list includes best practices when managing your monitor weight goals.
Readings are entered manually or with a Withings digital scale. The Withings scale automatically sends the reading to Allscripts FollowMyHealth™ Patient Access.

> Only weights from your Withings scale or manually entered by you are evaluated for this goal. Values from your provider are not included because each scale might be calibrated differently and can skew the results.

> The graph data point tooltip includes the reading, body mass index (BMI), patient-entered comments, and any broken rules.

> The Withings digital scale is set up through App Center. For more information, see Set up a Withings digital scale.

> You can connect to your Withings digital scale from a monitor weight goal on the Goals tab. Click Connect to a Withings Scale from the goal. When the scale is added, Connect to a Withings Scale is no longer displayed.

> Every reading added on the Vitals tab in My Health is considered patient entered and is always counted for the weight management or weight monitoring goals if the date of the measurement is within the goal period.
Figure 87: Monitor weight data in graph format

Figure 88: Monitor weight data in table format
View goals and readings

Before you begin
You must accept a new goal to add the goal to the Goals tab.
You must have at least 1 goal for the Goals tab to display. The number of unaccepted goals is displayed on the Goals tab until you accept or decline the new goals.

> Click My Health > Goals. Alternatively, you can click the goal notification in Action Center to access the Goals tab. The Goals tab is displayed.

There are 5 different states for a goal, new, active, completed, declined, or cancelled. New goals must be accepted. Click Click here to accept the goal and begin collecting measurements. Click on a goal section header to see the goals in that state.

![Goals tab](image)

Figure 89: Goals tab

![Goal readings](image)

Figure 90: Goal readings

> To change the goal display, click Graph or Table. You can toggle between Graph and Table views.

> To edit a reading from the table view, click .
To remove a reading on the table view, click 

The reading is removed from your personal health record (PHR) and no longer is displayed on the goal.

To restore a reading, go to My Account > Preferences > Restore Deleted Items.

Accept a new goal

You must accept a new goal to get started. By accepting the goal, you are consenting to share information related to the goal with the ordering provider and care team.

This task has 6 steps.

1. Click My Health > Goals.

Alternatively, you can click the new goal notification on Action Center to access the Goals tab.

The Goals tab is displayed.

Goals

⚠️ You have 1 new goal from your provider. Click here to get started.

- Active Goals
- Completed Goals
- Declined Goals
- Cancelled Goals

![Figure 91: Goals tab](image)

2. Click Click here to view the new goal.

Goals opens.

3. (Optional) Select the preferred communication method that you want receive your reminder from.

   > Select Email to get your reminder through an email message. Click Change if you want to update your email address. Email is the default.

   > Select Text Message to get your reminder through a text message. Click Change or Remove if you want to add an alternative cell phone number. This method can only be used if the cell phone number is verified.

If Email or Text Message are not selected in My Reminders when Continue is clicked, the goals are processed without the default reminder.
If Email or Text Message is selected in My Reminders when Continue is clicked, the default reminders are uploaded.

Note: The goals are not accepted or processed until Continue is clicked on the default reminders page.

4. Select Accept for the goals that you want to accept.
5. Click Continue.
The default reminder created by the application is listed. You can accept, edit, or delete the reminder.
6. Click Continue.
The Active Goals tab is displayed and includes the goals that you accepted.

Results of this task
The ordering provider is sent a notification that the goal was accepted.
The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

What to do next
Connect to your wireless device, such as a Withings scale, blood pressure monitor, or Telcare blood glucose meter, or manually enter additional readings, as needed, if you do not have a wireless device.

Accept a default goal reminder
Allscripts FollowMyHealth™ Achieve automatically sets default reminders for you. You can accept these default reminders when you accept the goal.

Allscripts FollowMyHealth™ Achieve uses information from the goal, such as frequency, duration, goal and order type, and the start date, to determine what the reminders include. The determination is not exact because each patient has different needs.

You can preview the default reminders and decide if you want to accept, delete, change, or create your own.

This task has 5 steps.

1. Click My Health > Goals.
The Goals tab is displayed.
2. Click Click here to view the new goal.
Goals opens.
3. Select Accept to accept the goal.
4. Click **Continue**.
   A default reminder for the goal is listed.

5. Click **Continue** to continue to accept the default goal reminder and the goal.

**Results of this task**
You have accepted the reminder default reminder and the goal. Accepted reminders are displayed in the table on **My Reminders** in alphabetical order.

---

**Delete a default goal reminder**

Allscripts FollowMyHealth™ Achieve automatically sets default reminders for you.

You might not want to use the default reminders that the application has created. In this scenario, you can delete these default reminders when you accept the goal.

This task has 8 steps.

1. Click **My Health > Goals**.
   The **Goals** tab is displayed.

2. Click **Click here** to view the new goal.
   **Goals** opens.

3. Select **Accept** to accept the goal.

4. Click **Continue**.
   A default reminder for the goal is listed.

5. Double-click the default reminder.
   The reminder details open.

6. Click **Delete**.
   **Confirm Delete** opens.

7. Click **Delete**.
   **Goals** opens.

8. Click **Continue** to continue to accept the goal.

**Results of this task**
You have deleted the default reminder.
Edit a default goal reminder

Allscripts FollowMyHealth™ Achieve automatically sets default reminders for you.

You might not want to use the default reminder that the application has created. In this scenario, you can edit the default reminders when you accept the goal.

This task has 8 steps.

1. Click My Health > Goals.
   The Goals tab is displayed.
2. Click Click here to view the new goal.
   Goals opens.
3. Select Accept to accept the goal.
4. Click Continue.
   A default reminder for the goal is listed.
5. Double-click the default reminder.
   The reminder details open.
6. Enter the changes for the reminder.
7. Click Set Reminder.
   The edited default goal reminder is listed.
8. Click Continue to continue to accept the goal.

Results of this task

You have edited the reminder default reminder and accepted the goal. Accepted reminders are displayed in the table on My Reminders in alphabetical order.

Add a reading

Before you begin

You must accept a goal before you can enter a reading.

The goal includes the rules set by your provider. If the rules are broken, your provider receives a notification after your reading is entered. You also receive a goal alert in Action Center if your reading violates 1 or more rules set by your provider.
1. For the first reading, click **enter your current reading** or connect to a wireless device to have readings automatically sent to the portal. For example, if you are entering a weight, click **enter your current weight** or use the Withings scale to enter your reading electronically.

If this is not the first reading, a graph is displayed with your progress. Click **Add a Reading** to add an additional reading.

![Figure 92: Adding a weight reading](image)

A window opens where you can add your reading. The following example shows the **Add Weight Vital** window that is displayed when you add a weight reading.
2. Click **Save**.

**Results of this task**
The reading is saved in Allscripts FollowMyHealth™ Patient Access and analyzed. A message is displayed while your measurements are analyzed. If the reading did not break a rule, a message is displayed indicating that analysis is complete and no issues were found.

The goal is updated and a graph is displayed. Additional information about each reading is available in a tool tip when you point to each data point.

**Note:** Only readings that fall within the start and end date are included on the goal.
If a reading is outside the parameters set by your provider, a goal alert is displayed after the reading is entered.

![Figure 94: Goal alert for broken rule](image)

An alert is also flagged on the graph and table view.
Figure 95: Goal violation on graph view

Enter additional manual readings or connect to a wireless device for measurements to continue

Figure 96: Goal violation on table view
capturing readings and working to accomplish your goal.

Decline a new goal

You can decline a goal when it is new or active.

1. Click My Health > Goals.
   Alternatively, you can click the new goal notification on Action Center to access the Goals tab.
   The Goals tab is displayed.
2. Click Click here to view the new goal.
   Goals opens.
3. Select Decline for the goals you want to decline.
4. Click Continue.
   The Declined Goals tab is displayed and the declined goal is listed.

Results of this task

The ordering provider is sent a notification that the goal was declined.

The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

Decline an active goal

You can decline a new or active goal that has been accepted and is listed in Active Goals on the Goals tab.

1. Click My Health > Goals.
   The Goals tab is displayed and Active Goals opens.
2. Click decline this goal.
   Decline Goal opens.
3. Click Decline Goal.
   When you decline the goal, the goal is listed under Declined Goals with the date that the goal was declined. There are no readings displayed for declined goals.

Results of this task

The ordering provider is sent a notification if you decline the goal.
The Goal Release of Information Authorization is created when the goal is declined and sent to the Documents tab.

**Notifications**

Notifications are sent for goal reminders, new goals, completed goals, appointment reminders, personal health record (PHR) updates, and other health-related reminders.

You can set up goal reminders when you accept a goal or from My Reminders. These reminders can be changed at any time.

You or an authorized individual (proxy) can receive goal notifications through email and text message.

When a provider creates a new goal for you, you can receive an email or text message, and email message is sent to your Inbox in Allscripts FollowMyHealth™ Patient Access.

![Figure 97: New goal notification in Inbox](image)

When your provider creates a goal for you, a notification is sent to your inbox, and a new goal indicator is displayed under the Action Center.
A goal alert is a type of notification that is displayed in **Action Center** if your reading violates 1 or more rules set by your provider. You or an authorized individual (proxy) can receive additional goal alerts through email and text message. Goal alerts are also displayed as banners on the **Goals** tab when you manually enter readings.

You can configure the notification method when you add the goal reminder, on the **Notification Preferences** tab, or when you accepting a goal from the **Goals** window.
When a goal reminder is set and the email address and cell phone number are entered, the information is synchronized with the information on Demographics.

Add a reminder

You can add a reminder to notify you when to take measurements, when your goal ends, or other customized reminders. The notifications are scheduled emails or text messages.

You can also accept default reminders during the goal acceptance process.

This task has 11 steps.

1. Click My Health > Goals.
   The Goals tab is displayed.

2. Click My Reminders.
   My Reminders opens.
   If you have reminders, a table lists the reminders. If you do not have reminders, only the communication method settings are displayed.

   Note: You can also open My Reminders when you click Edit in the My Reminders section in My Account > Preferences > Notification Preferences.

3. Select the communication method for receiving your reminder.
   > Select Send email reminders to get your reminder through an email message. Click Change to update your email address. Send email reminders is selected by default.
   > Select Send text message reminders to get your reminder through a text message. Click Add a cell phone number to add an alternative cell phone number. This method can be used only after the cell phone number is verified.

4. Click Add Reminder.
   Reminder opens.

5. For Name, enter a name for the reminder.

6. For Type, select how often you want to receive the reminder.
   Valid values are:
   > Once
   > Daily (default)
   > Weekly
   > Monthly
   > Yearly
   The type selected determines the Frequency preferences that are displayed.

7. From This is a reminder to, select the reason for the reminder.
Valid values are:

- **Do something** (default)
- **Take weight**
- **Take blood pressure**
- **Take blood glucose**

8. For **Reminder Text**, enter the information that you want to see in the reminder.

9. For **Frequency**, enter how often, the day of week, and the time of day that you want the reminder to occur.

   The reminder type selected in step 6 determines the **Frequency** preferences that are displayed.

**Daily**

The value must be a whole number that is greater than 0 and less than or equal to 365. The default is 1 day.

The time of day must be valid and set according to your time zone. The default time is now.

At least 1 day of the week must be selected.

**Monthly**

Select an exact day of the month, for example the 15th of each month. Or, select a relative day of the month, for example, the last Sunday of the month.

If you select an exact day of the month, the numeric value is displayed and the current day is the default. This value must be a valid day of the month with a value between 1 and 31. When the reminder is scheduled to a date that the month does not reach, the last day of the month is changed to the last day of that month. For example, if you select 31 and the month is June, the number is changed to 30. If the reminder occurs on the last day of the month, set the value to 31 and the application changes the value to the last day of the month when scheduling the reminder.

If you select **The**, the other day boxes are replaced with the day of the week and the day within the month it counts for. For example, The Third Tuesday. The value that is entered in the month box must be between 1 and 12.

The time of day must be valid and set according to your time zone. The default time is now.

**Weekly**

The value must be a whole number that is greater than 0 and less than or equal to 52. The default is 1 week.

The time of day must be valid and set according to your time zone. The default time is now.

At least 1 day of the week must be selected.
Yearly

The value must be a whole number that is greater than 0 and less than or equal to 20. The default is 1 year.
The time of day must be valid and set according to your time zone. The default time is now.
Month and day defaults to today. The month list includes all 12 months. The day must be a whole number between 1 and the number of days in the selected month. Do not enter more than 31.

Once

The date must be in the future. The default is today's date.
The time of day must be valid and set according to your time zone. The default time is now.

10. For Duration, select the start and end date from the calendar tool.
The default start is the current date.
The duration type has the following valid values:
   > No end date (default)
   > End by
   > End after
   If End by is selected, a date box is displayed. You must enter the end date with the calendar tool.
   If End after is selected, an occurrences box is displayed. You must enter the number of days that you want the reminder to occur. The number must be a whole number greater than 0.

11. Click Set Reminder.
   When you click Set Reminder, a validation process is started. If there are no validation errors, the reminder is saved.

Important: If you click close before you click Set Reminder, the reminder closes and is not saved.

Results of this task
The reminder is displayed in the table on My Reminders in alphabetical order.

Delete a reminder from My Reminders
You can delete a reminder from My Reminders.
You can also delete default reminders during the goal acceptance process.
This task has 5 steps.

1. Click **My Health > Goals**. The **Goals** tab is displayed.

2. Click **My Reminders**. **My Reminders** opens and the reminders are listed.

3. Double-click the reminder that you want to delete. The reminder details are displayed.

4. Click **Delete**. **Confirm Delete** opens.

5. Click **Delete**.

**Results of this task**
You have deleted the reminder and it is removed from **My Reminders**.

**Edit a reminder from My Reminders**
You might want to change a reminder after you accepted a goal. In this scenario, you can edit the reminder from **My Reminders**.

This task has 5 steps.

1. Click **My Health > Goals**. The **Goals** tab is displayed.

2. Click **My Reminders**. **My Reminders** opens, and the reminders are listed.

3. Double-click the reminder that you want to edit. The reminder details are displayed.

4. Enter the changes for the reminder.

5. Click **Set Reminder**. The edited goal reminder is listed.

**Results of this task**
You have edited the reminder.
Chapter 7

My Info

The My Info tab contains your demographic and provider information.

From the Demographics tab, you can manage your basic information, insurance, emergency contacts, and the person who is responsible for your account. From the Providers tab, manage information about your preferred and other providers who you use for healthcare.

Demographics

Demographics includes 4 tabs, General, Emergency Contact, Responsible Party, and Insurance.

Edit general demographics

The General tab includes Basic Information, Social Information, and Preferred Pharmacy.

This task has 5 steps.

1. From My Info select Demographics. Demographics opens.

2. From Basic Information, update basic information or add information that is not automatically filled.
Some of the information in **Basic Information** might be filled in based on the information that your healthcare organization already has recorded for you.

3. From **Social Information**, select your race, ethnicity, and language. The federal government mandates the healthcare organization to collect this information. Select **Declined to Answer** if you do not want to provide this information.

   **Note:** You can make multiple race and ethnicity selections. To make multiple selections, make an initial selection and then select subsequent selections while holding down the *Ctrl* key.

4. Click **Save**. **Save Successful** opens.

5. Click **OK**.

**Edit your preferred pharmacy**

You can also edit your preferred pharmacy from **My Health > Medications**.

This task has 5 steps.

1. From **My Info**, select **Demographics**. **Demographics** opens.

2. From the **General** tab, click **Edit** under **Preferred Pharmacy**.

3. For **Search**, enter the ZIP Code area that you want to search. By default, your ZIP Code is displayed when **Pharmacy Search** opens. You can change the value.

4. For **Distance in Miles**, select the proximity in miles that you want the application to search. Allscripts FollowMyHealth™ searches for area pharmacies based on your ZIP Code. To widen or narrow your search, select an increment between 5 and 100 miles.

5. Select a pharmacy and click **Connect**. The pharmacy that you selected is now listed as your preferred pharmacy under **Preferred Pharmacy**.

**Edit emergency contact**

The **Emergency Contact** tab lists the person that your healthcare organization should contact if there is an emergency when you are with your healthcare provider.

This task has 5 steps.
1. From My Info, select Demographics. Demographics opens.

2. Click the Emergency Contact tab. The Emergency Contact tab is displayed.

3. Enter information in Name, Contact Information, and Address, or update the existing information. Some of the information in Emergency Contact might be filled in based on the information that your healthcare organization has recorded for you.

4. Click Save. Save Successful opens.

5. Click OK.

Edit responsible party

The Responsible Party tab indicates the person who is responsible for any charges incurred with the healthcare organization. This person is also referred to as the guarantor.

This task has 5 steps.

1. From My Info, select Demographics. Demographics opens.

2. Click the Responsible Party tab. The Responsible Party tab is displayed.

3. Enter information in Name, Contact Information, and Address, or update the existing information. Some of the information in Responsible Party might be filled in based on the information that your healthcare organization already has recorded for you.

4. Click Save. Save Successful opens.

5. Click OK.

Edit insurance information

The Insurance tab lists your primary, secondary, and tertiary insurance information.

This task has 5 steps.
1. From My Info, select Demographics. Demographics opens.
2. Click the Insurance tab. The Insurance Information tab is displayed.
3. Enter information in Name, Contact Information, and Address, or update the existing information for each section, Primary, Secondary, and Tertiary. Some of the information in Insurance might be filled in, based on the information your healthcare organization already has recorded about you.
4. Click Save. Save Successful opens.
5. Click OK.

Providers

Providers includes 2 tabs, My Providers and Additional Providers.

To access Providers, click My Info > Providers.

The My Providers tab displays the providers that are associated with your healthcare record. The Additional Providers tab displays providers that you do not have a relationship with, but they are accepting new patient requests. If you are connected to more than 1 healthcare organization, you can view the providers from each organization by selecting the organization from the organization search in the upper right. By default, the Additional Providers tab displays providers from all organizations.

Each provider can enable the type of online communication that he or she wants to enable, including scheduling an appointment, renewing a prescription, requesting a consultation, requesting a referral, sending a message, and sending a profile to a friend. The tasks that you can complete are displayed under What do you want to do, depending on the services that the provider enables. The only option available from the Additional Providers tab is to schedule an appointment.
Send a provider profile
You can share a provider profile with family and friends from the My Provider tab.
1. From My Info, select Providers. Providers opens.

2. From What do you want to do, select Send Profile to a Friend. Share Provider Profile opens.

3. Enter the email address of the person that you want to send the profile to, a subject, and message.

4. Click Send.
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