Getting Around

Use Main Menu Links

- The Main Menu Bar has links to various features on the portal
  - Program Tools
  - Customer Support
  - My Account
  - Message Center

Use Left-hand Links

- The Left-hand Controls provide information to specific portal features
  - Enroll a Patient
  - Incomplete Enrollments
  - View Patient Profile
  - Contact Information

Find a Feature

- Logging in to the portal will give you access to all available features
- Features are easily accessible either by the Main Menu Bar or Left-hand controls
- You can navigate to any feature at any time within the portal

Managing Your Account

Step 1:
Review Your Account

- Click on “User Profile” under the “My Account” Menu Bar option
- Review your information

Step 2:
Manage Your Account

- Physician or Office information can be modified, as well as other Physicians and Offices can be added to the account
- Turn on or turn off daily Patient Alert Emails

Step 3:
Submitting Your Changes

- Click submit to have the changes verified and updated by the Program
- An email will be sent to confirm the account changes

Completing an Online Enrollment

Step 1:
Begin a New Enrollment

- Click on “Enroll a Patient” to start
- Make your selections for Form Name/Program/Product(s)/Site/Physician
- Enroll a New Patient by selecting “New”
- Re-enroll an Existing Patient by selecting the Patient’s name

Step 2:
Enter Information in for the Patient

- Enter all required fields at a minimum on each tab of the enrollment
- You can navigate by using either the tabs or the buttons on the tabs
- Once data entry is complete, review the data entered

Step 3:
Review, Finalize, & Submit

- Finalize all data and correct any errors
- Approve and Submit the data
- Follow the steps on the Confirmation page to complete Submission

Viewing Patient Information

Step 1:
Select a Patient to View

- On the “Patient List,” click on the Patient’s name OR…
- From the Left-hand Controls, select your Patient’s name from the “VIEW PATIENT PROFILE” dropdown list

Step 2:
View Patient Information

- Click on tabs to view different sections of data related to the Patient
- To view detailed information, click on hyperlinks within the tab pages
- If needed, click the “Print Patient Profile” to print the desired tabs for that Patient

Step 3:
Upload/Download Documents

- From the “DOCUMENTS” tab, you can upload documents related to a Patient
- From the “DOCUMENTS” tab, you can download documents related to a Patient

Searching for Patient Records

Step 1:
Basic Search

- On the Secure Home page, choose to filter Patients by alerts OR…
- Search by Patient Last Name

Step 2:
Advanced Search

- On the Secure Home page, click the “Advanced Search” link
- Choose additional filters to refine your search

Step 3:
Review the Search Results

- Click Search
- Click the desired Patient in the search results table to view their details

Understanding Program Alerts

Step 1:
Understand the Program Alert

- Patients with Alerts will display on the Secure Home page
- Alerts are provided to help understand what is needed to move a Patient through the process successfully

Step 2:
Managing the Alert

- Click on the Alert to find out more details about what is needed
- Follow the steps within the Alert to complete it

Step 3:
Turning On or Turning Off the Alert

- An email will be sent with a list of Patient Alerts that need action
- To turn these email Alerts off or back on or to change the frequency, click on "User Profile" under the "My Account" Menu Bar option

Downloading Program Forms

Step 1:
Find Program Tools Section

- Click on the "Program Tools" Link from the Menu Bar
- A list of available tools will display

Step 2:
Select the Program Forms Option

- From the list of available tools, select the "Program Forms" Page

Step 3:
View & Save Form

- From the "Program Forms" page, you can select a form to view
- You can save the form to your local machine

Sending a Secure Message

Step 1:
View the Message Inbox

- Click on the "Message Center" from the Menu Bar or the "You Have XX New Messages" link in the right-hand corner of the Home page
- The Message Center Inbox will display

Step 2:
Filter Messages

- Filter messages by Service, Product, and/or Patient Name
- Click the message to review. The message history will display

Step 3:
Create a Message

- **TO REPLY:** Click "Reply" and type the new message & Click "Send"
- **TO CREATE NEW:** Click "Compose Message" and type the new Message & Click "Send"