

Patient Portal

A Patient Portal account is a centrally located account that is set up outside of Quantum[®] Electronic Health Record (EHR) by a patient or a patient's authorized representative. This account enables you and the patient or the authorized representative to communicate via secure messaging and for the patient or authorized representative to receive, view, and save patient health data that you route to the patient.

Generate a Patient Portal Invitation

- 1 View a patient's summary.
- 2 Click *Patient Communication > Patient Portal Link > Send Invitation*.
- 3 When the *Patient Portal Invitation* dialog box appears, click *Patient* or *Authorized Representative* to indicate who the invitation is for.

Note: Patients under 13 years old must have their accounts set up by an authorized representative, and patients between 13 and 18 years have the option of setting up their own accounts or having their authorized representative set up an account.

- 4 Click *Print Invitation*, or click *Email Invitation to*, and then type the patient's email address.
- 5 Click *Continue*.
- 6 If you select the print option, use your browser's print functionality to print the letter.

Caution! The patient's identity should be verified prior to providing them with a PIN. The person to whom you give the PIN will be able to receive patient health data that you send from that patient's Quantum[®] EHR record.

- 7 If you want the patient to have a copy of their office summary available upon registering for their MyQuest account, continue with "[Create an Office Visit Summary](#)".

Caution! If you do not send the patient a copy of their office summary at this time, it can negatively impact your Promoting Interoperability (PI) metrics.

Create an Office Visit Summary


- 1 View a patient's summary.
- 2 Verify that you can create a patient's office visit summary. If the patient's status is *Requested*, continue to the next step to create an office visit summary; however, the patient's office visit summary will remain queued until the patient finishes the registration process.
- 3 Click *Patient Communication > Patient Portal Link > Create Summary*.
- 4 In the *Office Visit Date* box, specify a date to identify the encounter note that is related to the office visit.
- 5 Select the *Compliant Summary of Care Quick Select* check box.
- 6 If there is information that you do not want disclosed to the patient due to legal or medical reasons, do the following:
 - a Select the *Information withheld due to potential harm to the patient* check box.
 - b Type the reason why this information is not being disclosed in the *Reason* box.
 - c Clear the check box(es) next to the appropriate data on any of the tabs.
- 7 From the *Visit Details, Labs, Problems, Allergies, Meds, Radiology Results, Patient History, Diagnostics, Clinical Notes, Other*

Documents, Care Team, or Devices tabs, select the check box next to each data item that you want to print, or select the check box in the column heading to select all data items listed for the category. Some tabs support filtering, so you can browse only certain subsets of clinical data.

Caution! If you selected the *Compliant Summary of Care Quick Select* check box, removing data items on any of these tabs can negatively impact if you have not selected the *Information withheld due to potential harm to the patient* check box.

- 8 From the *OB* tab (if it is visible), select the *Include Antepartum Package* check box to include OB data and/or additional clinical data in an antepartum report and then do the following:
 - a Enter a date range at *Start* and *End*.
 - b Select or clear the check boxes to indicate which clinical data to include in the report.
- 9 Click *Create*.

Send a Direct Message to a Patient Portal Account

- 1 Access a patient's chart, and then at the top, click .
- 2 To send a message directly to a patient via the Patient Portal, select the *Send to Patient Portal* check box.

Note: You can only send messages to patients who have a Patient Portal account; if the patient does not have an account, the *Send to Patient Portal* check box does not appear.

- 3 Complete the *Subject* box.
- 4 Select a *Reason for Disclosure*.
- 5 To attach the patient's data, click *Add Attachments* to select items, and then click *Attach Selected*.
- 6 Type the message content, and then click *Send*.


View a Received Message

- 1 Click the *Message Center* tab.
- 2 In the *Messages* menu, click *Inbox*.
- 3 In the messages *Inbox*, click the message you want to view.
- 4 Review the message as well as attached clinical activities.

Send a New Lab Result to a Patient

- 1 Click *Message Center > Labs > New Lab Results*.
- 2 Click *Send* or *Resend* (located in the *Send to Patient* column).

Note: You can only send new results to patients who have set up an account in Patient Portal and established a link with Quantum EHR.

When the lab result is successfully sent,  appears in the *Send to Patient* column. The next time you log in and view the *New Lab Results* page, *Resend* will appear.

Send a New Clinical Document to a Patient

- 1 Click *Message Center > Clinical Documents*.
- 2 Click *Send* or *Resend* (located in the *Send to Patient* column).

For help, contact the Help Desk at 1.800.697.9302

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