

Exa[®] PACS|RIS

34.1.5

Patient Portal User's Manual

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Welcome to Exa Patient Portal

Introduction

Symbols

The following symbols may appear in the product documentation or on the product.

Symbol	Symbol Name	Symbol Description	Standard Number and Name	Symbol Reference Number
	Manufacturer	Indicates the name and address of the manufacturer	ISO 15223-1:2021	5.1.1
	Authorized Representative in the European Economic Area (EEA)	Indicates the Authorized Representative, responsible for the device in the European Economic Area (EEA).	ISO 15223-1:2021	5.1.2
	Date of Manufacture	Indicates the date when the device was manufactured.	ISO 15223-1:2021	5.1.3
	Caution	Indicates information that is important for preventing loss of data or misuse of the software.	ISO 15223-1:2021	5.4.4
	Batch Code	Indicates the full Software Release / Version number	ISO 15233-1:2021	5.1.5
	Serial number	Indicates the manufacturer's serial number so that a specific medical device can be identified	ISO 15233-1:2021	5.1.7
	Catalogue Number	Indicates the manufacturer's catalogue number so that the device can be identified	ISO 15233-1:2021	5.1.6
	Consult instructions for use	Indicates the need for the user to consult the instructions for use	ISO 15233-1:2021	5.4.3
	Prescription Device	Caution: Federal law restricts this device to sale by or on the order of a licensed healthcare practitioner	21 CFR 801.109(b)(1) Prescription Devices	N/A

BS EN ISO 15223-1:2021 Medical devices - Symbols to be used with information to be supplied by the manufacturer - Part 1: General requirements

Regulatory and compliance



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Get started with Patient Portal

Set up your account and profile

Patient Portal is a website that you can use to request appointments, view information about your current and past exams, update insurance, and more. Your Patient Portal account is safe and secure; only you and your representatives can use it to view your patient records.

Create an account and sign in

To use Patient Portal, start by selecting the link emailed to you by your healthcare facility (sometimes it may be necessary to copy the link and paste it into the URL box of your web browser). Next:

1. On the Patient Portal page, select Click here to proceed.

Perform the following action(s)

Perform the following action(s) [Update Password](#)
» [Click here to proceed](#)

2. Type a password in the New Password box, re-type it in the Confirm Password box and select Submit.

Update password

⚠ You need to change your password to activate your account.

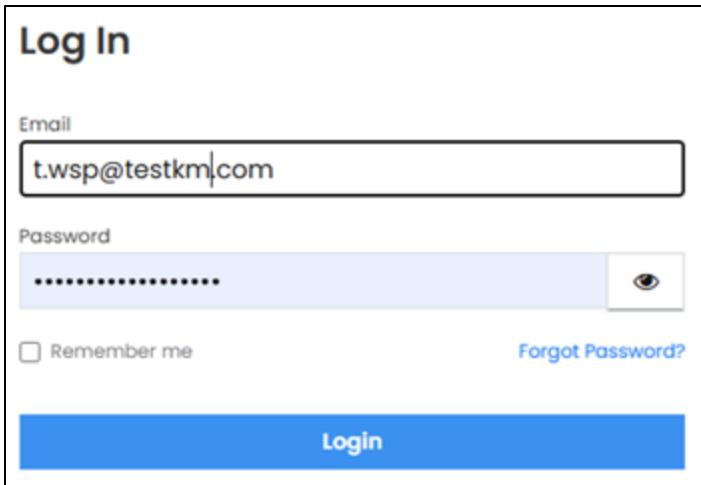
New Password
.....

Confirm password
.....

Sign out from other devices

Submit

3. On the Log In screen type your email address (this is your user name when you sign-in) and password.
 - Optional: Select Remember me to auto-fill your user name next time you sign in.



The image shows a 'Log In' screen with a white background. At the top left, the word 'Log In' is written in a dark blue, sans-serif font. Below it is a horizontal form field with a thin black border. The label 'Email' is in a small, dark gray font to the left of the field. Inside the field, the text 't.wsp@testkm.com' is entered. Below this is another horizontal form field with a light gray background. The label 'Password' is in a small, dark gray font to the left. Inside the field, there are several black dots representing the password. To the right of the field is a small, light gray square button with a dark gray eye icon. To the left of the password field is a small, light gray square button with a dark gray checkmark icon. To the right of the password field, the text 'Remember me' is in a small, dark gray font. To the right of that, the text 'Forgot Password?' is in a small, dark blue font. At the bottom of the screen is a large, solid blue rectangular button with the word 'Login' in white, sans-serif font in the center.

4. Select Login.
5. If the Mobile Authenticator Setup screen appears, use a mobile device to scan the QR code to obtain a code in your authenticator app.

Mobile Authenticator Setup

⚠ You need to set up Mobile Authenticator to activate your account.

1. Install one of the following applications on your mobile:

Google Authenticator
Microsoft Authenticator
FreeOTP

2. Open the application and scan the barcode:



[Unable to scan?](#)

3. Enter the one-time code provided by the application and click Submit to finish the setup.

Provide a Device Name to help you manage your OTP devices.

One-time code *

Device Name

Sign out from other devices

submit

6. In the One-time code box, enter the code from your authenticator app.
7. In the Device Name box, type a name for your device, and then select Submit.
8. If the HIPAA privacy notice prompt appears, select Yes if you accept the notice.
9. The next time you sign in to the portal with your user name and password, enter a one-time code from your authenticator app and select the Login button.

I forgot my password

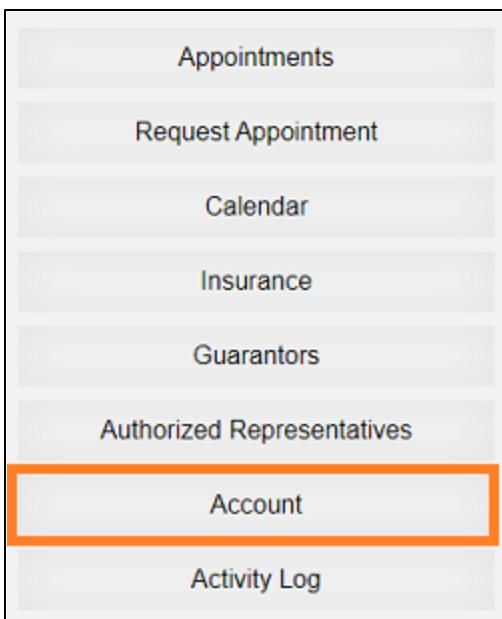
If you forget your password, you can reset it from the sign-in page.

1. On the sign-in page, on the right pane, select Forgot Password?
2. An email is sent with a link to reset your password.

Reset my password

For security and protection of your personal health information, periodically reset your password.

1. On the left pane, select Account.



2. On the Account dialog, select Credentials, and then select Reset Password.

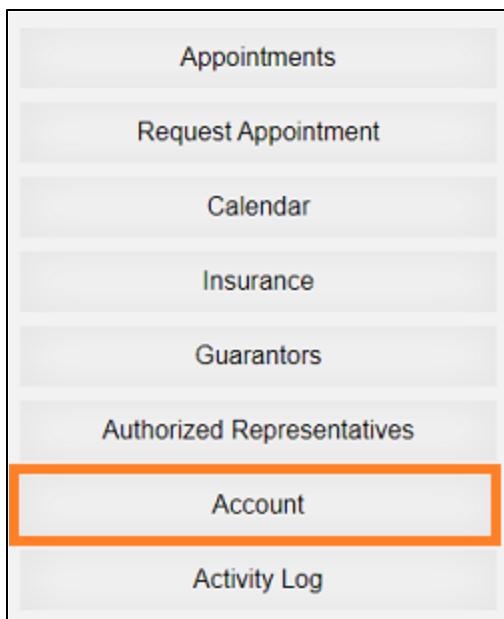
A screenshot of the 'Account' dialog. The 'Credentials' tab is selected. The 'My Account' tab is visible but not selected. The 'User Name' field shows 'Testerson, Testy'. The 'Email' field shows 'exa.testy:testerson+demo200@gmail.com'. Below these fields are 'New Email' and 'Confirm New Email' input fields, both currently empty. A 'Update Email Address' button is located below the input fields. At the bottom of the dialog is a 'Reset Password' button.

3. When the confirmation prompt appears, select OK.
4. An email is sent with a link to reset your password.

Update my profile

If your personal information changes, you can edit it.

1. On the left pane, select Account.



2. In the Account dialog, on the My Account tab, edit information as needed.

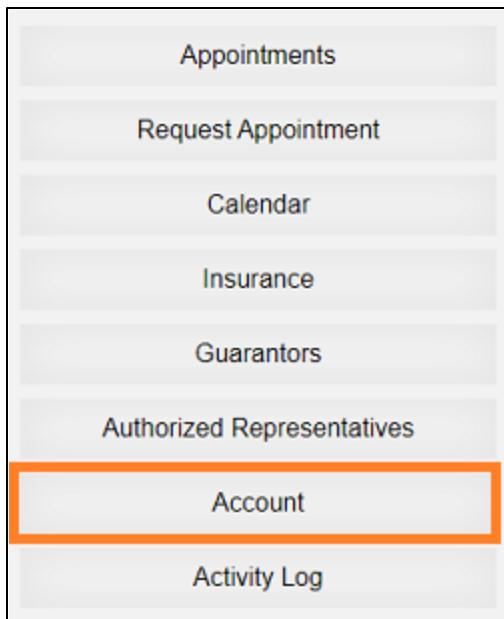
A screenshot of the 'Account' dialog box. At the top, there are two tabs: 'My Account' (which is highlighted with a blue border) and 'Credentials'. Below the tabs, the 'Patient Information' section is visible. It contains the following fields: Patient Name (Todd), Account Number (TW123), Date of Birth (12/30/2018), Sex (M), Marital Status (dropdown menu showing 'Select'), Address Line 1 (text input field), City (text input field), SSN (text input field), Address Line 2 (text input field), State (dropdown menu showing 'OR'), ZIP (text input field), Home Phone (text input field), Mobile Phone (text input field), and Work Phone (text input field). At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

3. Select Save.

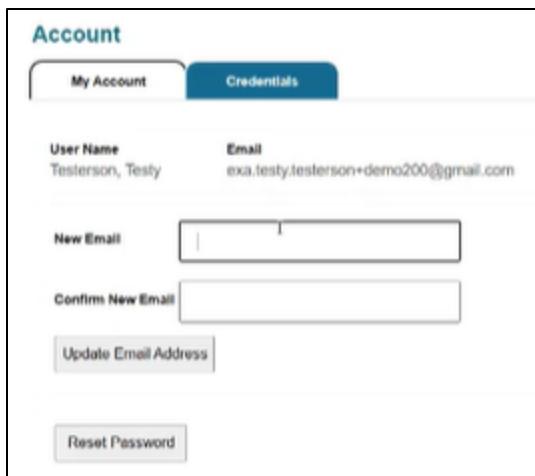
Update an email address

To update the email address for your account:

1. On the left pane, select Account.



2. In the Account dialog, select the Credentials tab.
3. In the New Email and Confirm New Email boxes, type an email address, and then select Update Email Address.

A screenshot of the 'Account' dialog. The 'Credentials' tab is selected. The 'My Account' tab is visible but not selected. The 'User Name' field shows 'Testerson, Testy'. The 'Email' field shows 'exa.testy.testerson+demo200@gmail.com'. Below these fields are two input boxes: 'New Email' and 'Confirm New Email', both of which are empty. Below these boxes is a button labeled 'Update Email Address'. At the bottom of the dialog are two buttons: 'Reset Password' and 'Logout'.

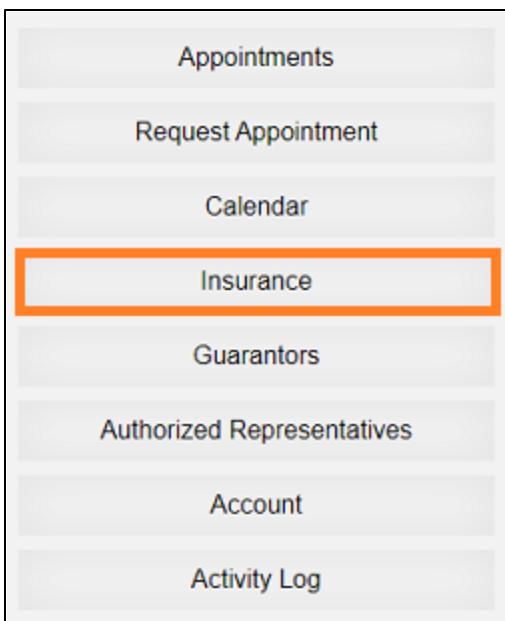
Result: A verification email is sent to the address you entered.

4. Use the link in the verification email to verify your new address.

Add an insurance policy

If you obtain new a insurance policy, you can add it.

1. On the left pane, select Insurance.



2. On the Insurance tab, click Add, and then enter all relevant information.

Insurance **+ Add**

* Level
Select

* First Name
First Name

Address Line 1

* Employee Status
Select

Middle Name
Middle Name

Address Line 2

* Insurance Provider
Search

Suffix
Suffix

City

* Policy Number
Policy Number

* Last Name
Last Name

State
Select

* Medicare Ins. Type
Select

* Relationship
Select

ZIP

Group No.
Group No.

Gender
Select

Pre-Cert. Phone

Group Name
Group Name

* DOB
DOB

Pre-Cert. Fax

Work Phone
Work Phone

Valid From Date
Valid From Date

Exp. Date
Exp. Date

Home Phone
Home Phone

Save **Cancel**

3. If this is your only policy, in the Level list, select Primary.

Insurance **+ Add**

* Level
Select
Primary
Secondary
Tertiary

* First
First
Middle
Middle
Midd

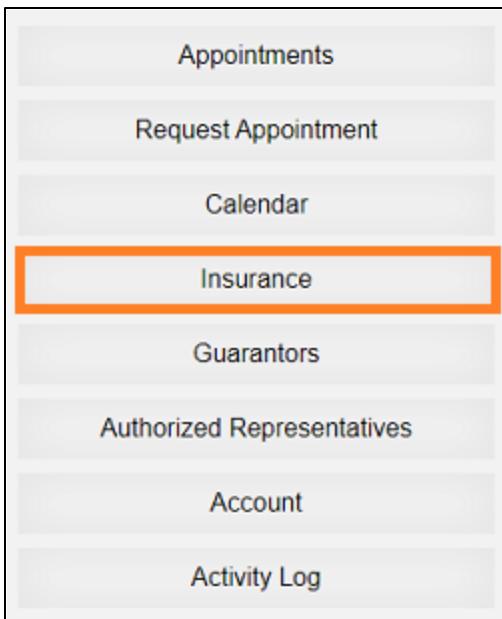
Otherwise, select Secondary for your second policy, or Tertiary for your third policy.

4. Select Save.

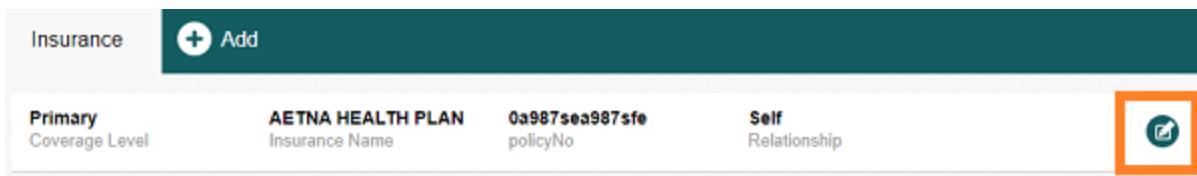
Update insurance information

If your insurance policy changes, you can update it.

1. On the left pane, select Insurance.



2. On the Insurance tab, find the policy you want to update, and on the right, select its edit  button.



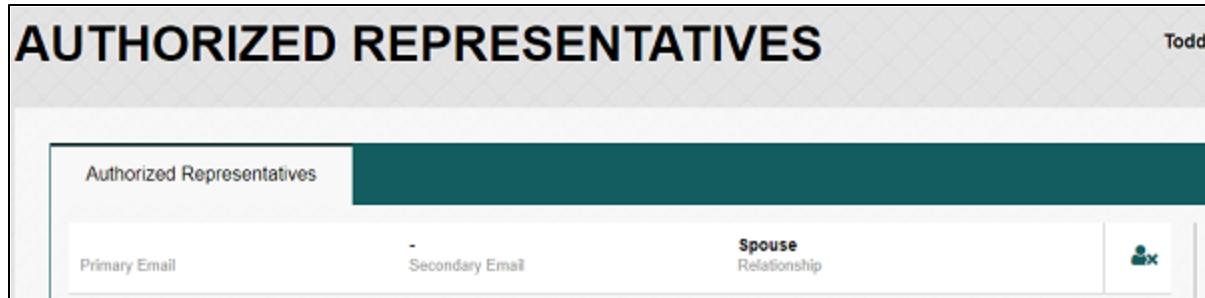
3. Edit the information as needed, and then click Save.

View authorized representatives

An authorized representative is a person you authorize to use your patient portal account. If your healthcare facility registered any authorized representatives for you, you can view them as follows:

1. On the left pane, select Authorized Representatives.

Result: The representatives appear in a list.



Authorized Representatives

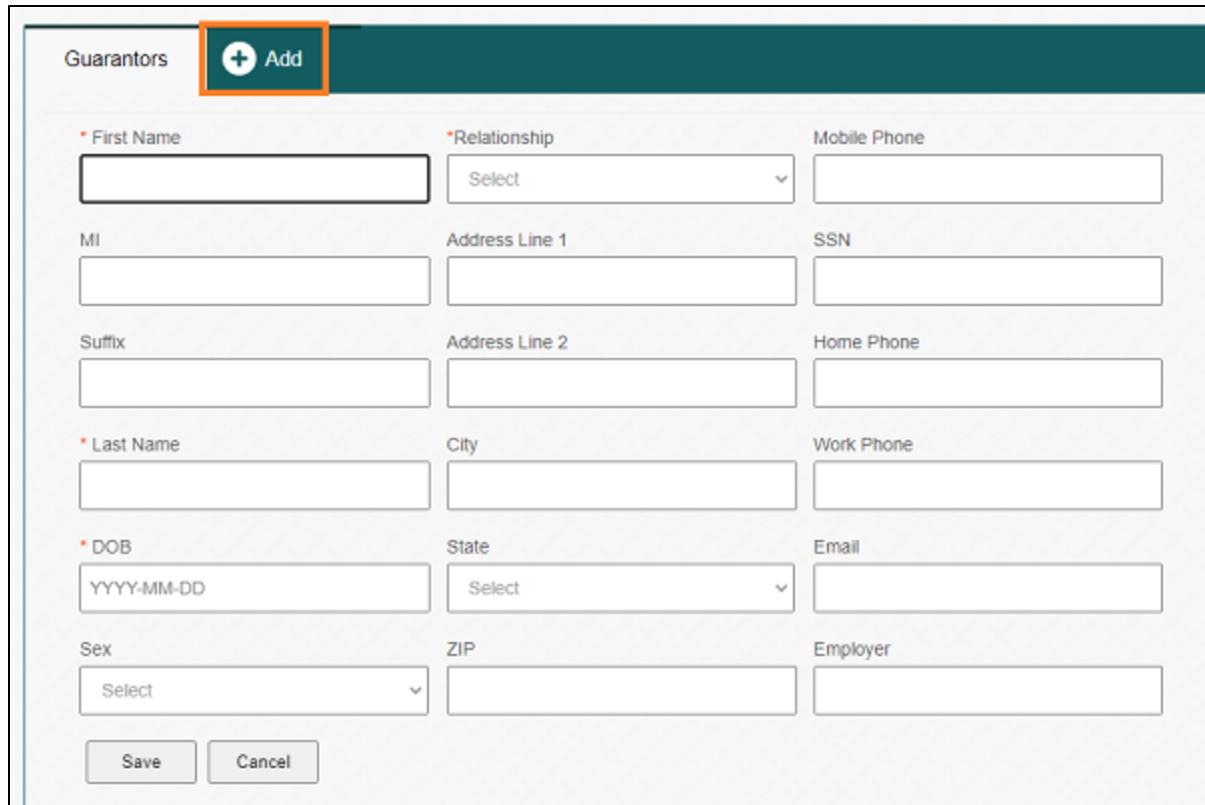
Primary Email Secondary Email Spouse Relationship

Todd

Add a guarantor

A guarantor is a person who accepts financial responsibility to pay the medical bill for the patient. To designate a guarantor:

1. On the left pane, select Guarantors.
2. On the Guarantors tab, select Add.



Guarantors **+ Add**

* First Name *Relationship Mobile Phone

MI Address Line 1 SSN

Suffix Address Line 2 Home Phone

* Last Name City Work Phone

* DOB State Email

Sex ZIP Employer

Save Cancel

3. Enter information about the guarantor, and then select Save.

Note: Fields with an asterisk (*) are required.

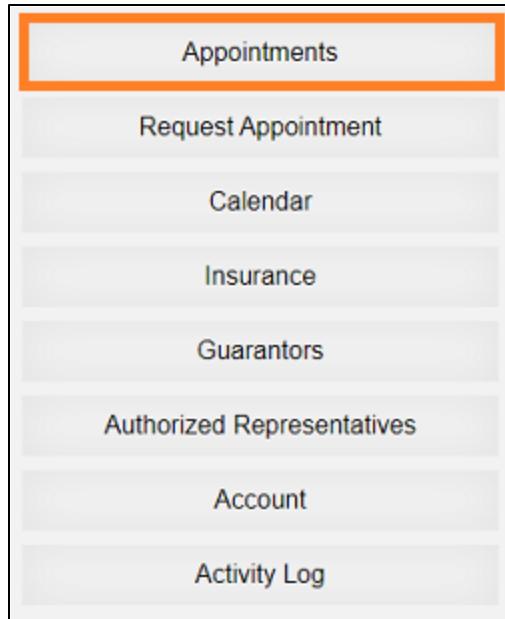
Use the patient portal

Using Patient Portal is a convenient way to request and view appointments, view your medical records (patient chart), and to send documents requested by your healthcare providers (such as scans of your insurance card).

Request an appointment

You can request an appointment for specific study on a specific date at a selected location.

1. On the left pane, select Request Appointment.



2. On the Appointments tab, select Add.

A screenshot of the 'Add' form for a new appointment. The form is divided into several sections: 'Add Information' (Location and Modality dropdowns, Requesting Date input), 'Schedule Notes' (text area), 'Referred By' (text input with a magnifying glass icon), 'Appointment Type' (input field), and a checkbox for 'As Soon as Possible'. At the bottom are 'Save' and 'Cancel' buttons. The 'Add' button in the top left of the form is highlighted with a red box.

3. Under Add Information, enter the following settings.

Setting	Description	
Location	Select your first choice of healthcare facility for the appointment.	
Modality	Select the type of imaging to receive. The following is a partial list.	
BD	Bone density	
BTO	Breast tomography	
CR	Computed radiography	
CT	CT (computed tomography)	
DG	Diaphanography	
DR/DX	Digital radiography/X-ray	
Laser	Like an x-ray, but using lasers for much more micro levels of imaging	
MG	Mammogram	
MR	MRI (magnetic resonance imaging)	
NM	Nuclear medicine	
OT	Other	
PT	PET (positron emission tomography)	
RF	Radio fluoroscopy	
RT	Record of treatment	
SC	Secondary capture	
SR	Structured reports	
US	Ultrasound	
XA	X-ray angiography	
Referred By	Select the doctor or healthcare provider who recommended imaging for you.	
Requesting Date	Select your first choice of date for the appointment.	
Schedule Notes	Type any special instructions or notes to the facility performing the imaging.	
Appointment Type	If you know the appointment type, type it here. For example: Chest CT.	
As Soon as Possible	If the appointment is urgent, select this check box.	

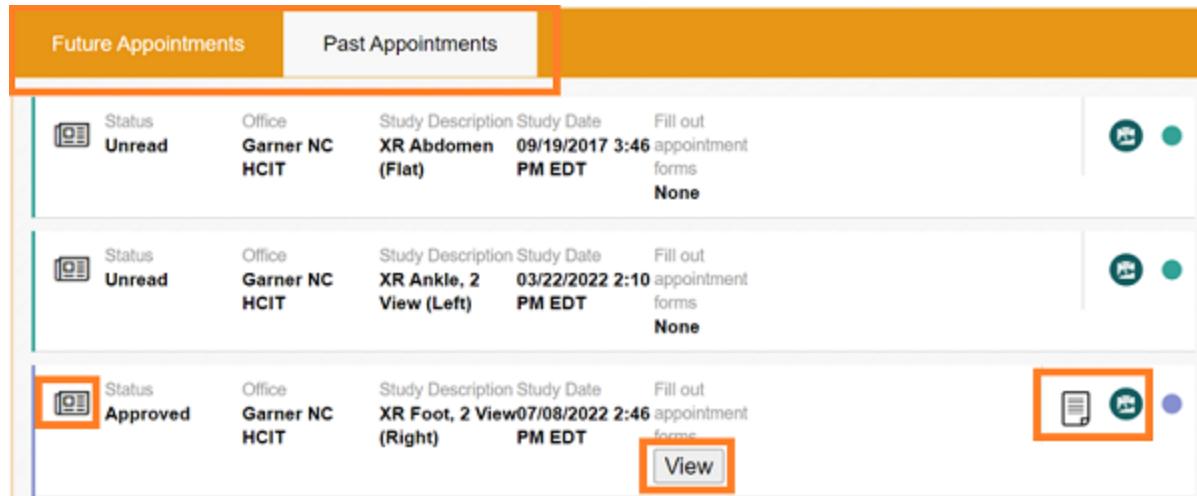
4. Click Save.

Result: The appointment request is sent.

View appointments and appointment confirmations

You can view information about your past and future appointments, fill out forms, and view and print the appointment confirmation card.

1. In the left pane, select Appointments.
2. Select the Future Appointments or Past Appointments tab.



Future Appointments		Past Appointments		
Status	Unread	Office	Garner NC HCIT	Study Description
XR Abdomen (Flat)				Study Date
				09/19/2017 3:46 PM EDT
				Fill out appointment forms
				None
Status	Unread	Office	Garner NC HCIT	Study Description
XR Ankle, 2 View (Left)				Study Date
				03/22/2022 2:10 PM EDT
				Fill out appointment forms
				None
Status	Approved	Office	Garner NC HCIT	Study Description
XR Foot, 2 View (Right)				Study Date
				07/08/2022 2:46 PM EDT
				Fill out appointment forms
				View

3. You can use the following buttons:

 View and print the appointment confirmation card.

 Fill out appointment forms

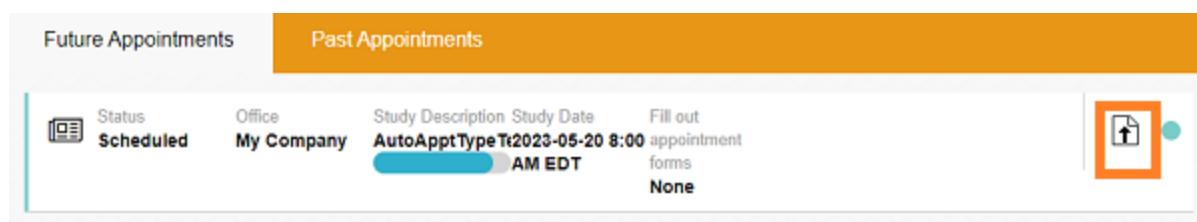
 View images. Opens the study in the OHIF viewer. For instructions on using the viewer, see <https://docs.ohif.org/user-guide/>.

 View approved reports

Upload a document

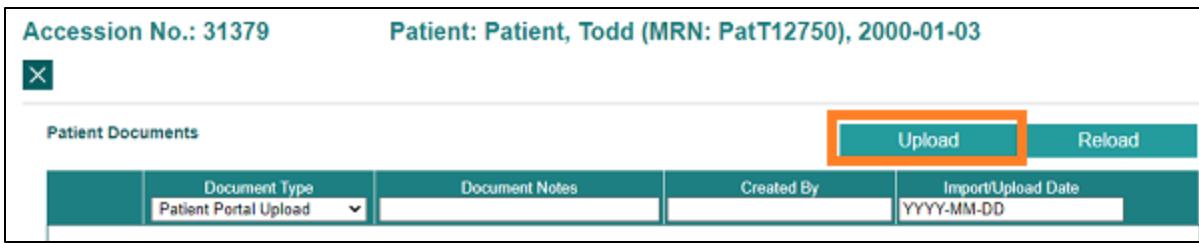
You can send documents to your healthcare provider such as scans of your insurance card, forms, and reports from prior exams by uploading them in the patient portal.

1. In the left pane, select Appointments.
2. Select the Future Appointments or Past Appointments tab.
3. On the row containing the appointment that pertains to your document, select the upload  button.



Future Appointments		Past Appointments		
Status	Scheduled	Office	My Company	Study Description
AutoAppType	Tr2023-05-20 8:00 AM EDT			Study Date
				Fill out appointment forms
				None

4. Enter any of the following that may be helpful to manage the document:



Accession No.: 31379 Patient: Patient, Todd (MRN: PatT12750), 2000-01-03

Patient Documents

Document Type	Document Notes	Created By	Import/Upload Date
Patient Portal Upload			YYYY-MM-DD

Upload Reload

- Document Type - Select the type of document to upload.
- Document Notes – Type a description, or other notes, if needed.
- Created By – Type the originator of the document (such as a doctor, or yourself).
- Import/Upload Date – Type the current date.

5. Select Upload.



Accession No.: 31379 Patient: Patient, Todd (MRN: PatT12750), 2000-01-03

Patient Documents

Document Type	Notes	Actions
Patient Portal Upload		Save Back

Document Type: Patient Portal Upload

Notes:

Maximum file size: 20 MB

Select Files

6. Select Select Files, browse for and select a file to upload, and then select Open.

Optional: Repeat to add additional files.

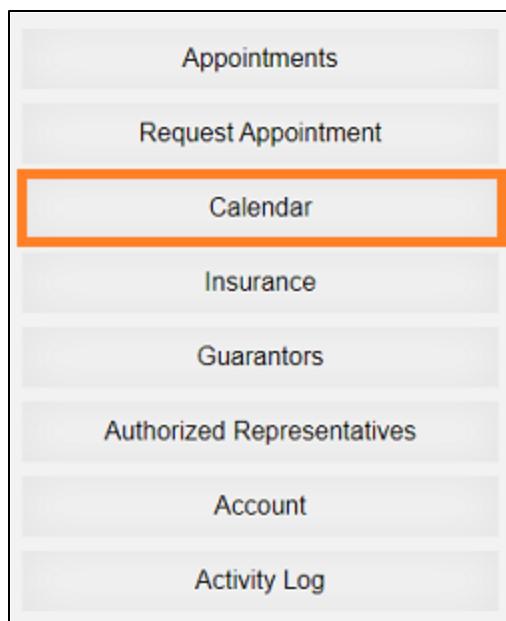
7. In the screen above, select Save.

Result: The files are added to your record, and can be accessed by your healthcare provider.

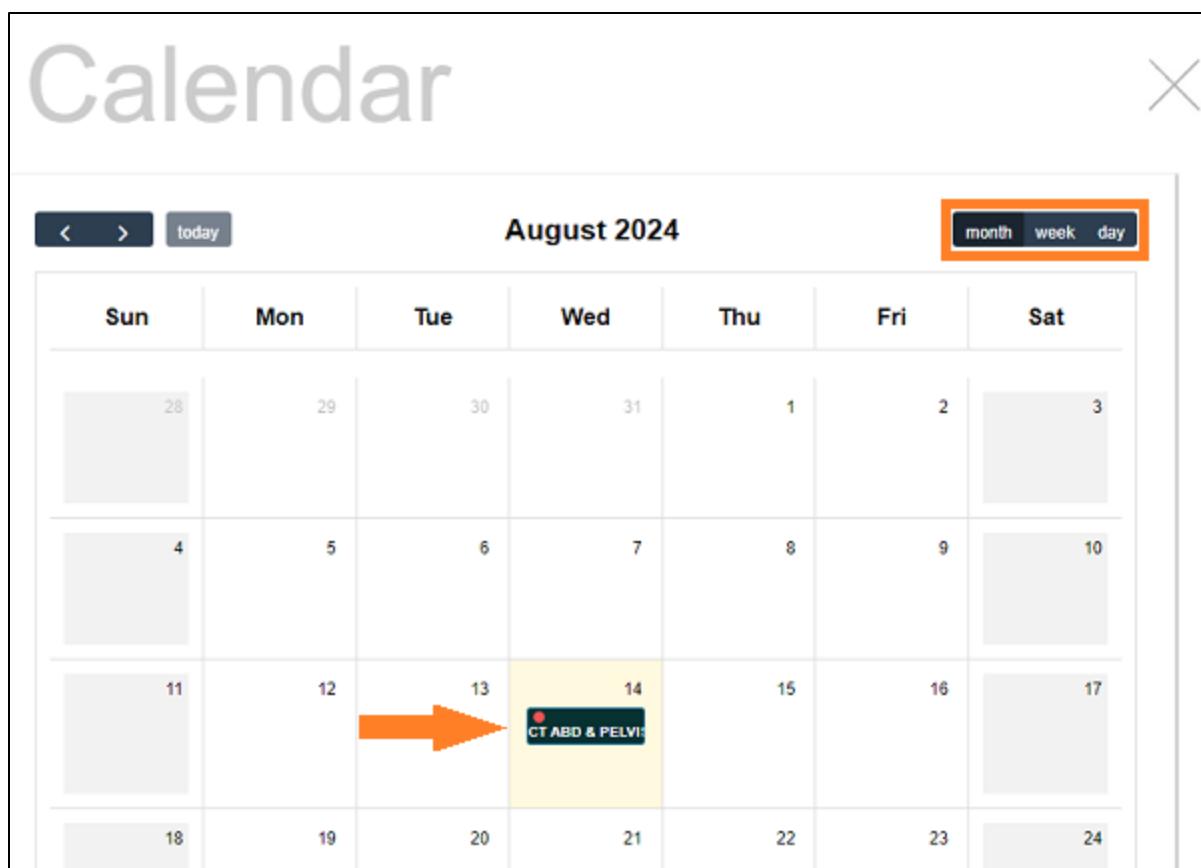
View your appointments in a calendar

You can open a calendar view of your appointments.

- On the left pane, select Calendar.



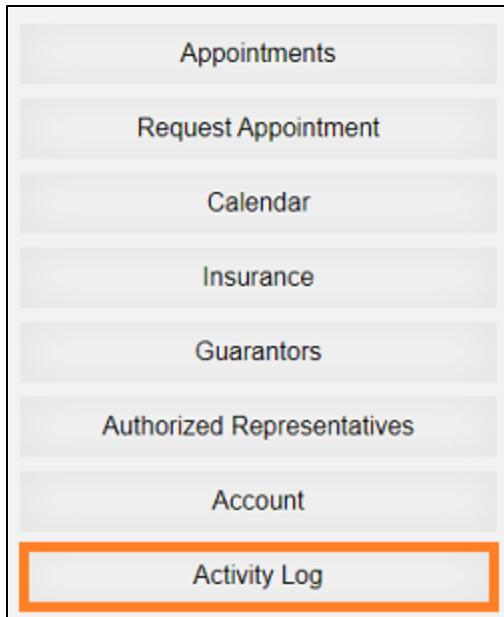
Result: The Calendar of appointments appears.



View account activity

To see a history of activity on your account:

1. On the left pane, select Activity Log.



2. Optional. To search for a specific log entry, select Search.

Activity Log		Search	
2023-05-18 2:25:07	PM EDT	HL7 Trigger	todd@ Email Address
Logged Date:		Screen:	Add: (PAT_UPD): Patient (Patient, Todd) has been added in HL7 Queue by Patient portal user (todd@.com)
2023-05-18 2:25:07	PM EDT	HL7 Trigger	todd@ Email Address
Logged Date:		Screen:	Add: (INS_INS): Patient (Patient, Todd) has been added in HL7 Queue by Patient portal user (todd@.com)
2023-05-18 2:25:06	PM EDT	Patient Insurances	todd@ Email Address
Logged Date:		Screen:	Add: New Patient insurance (AETNA HEALTH PLAN) has been created for the patient (Patient, Todd) by Patient portal user(todd@.com)
2023-05-18 2:24:50	PM EDT	Patient Info. Querying	todd@ Email Address
Logged Date:		Screen:	Query: Patient information queried

Sign out of the patient portal

When finished using the patient portal, sign out immediately.

- In the upper-right corner of the screen, select the power  button.