



Exa® PACS|RIS

34.1.7

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

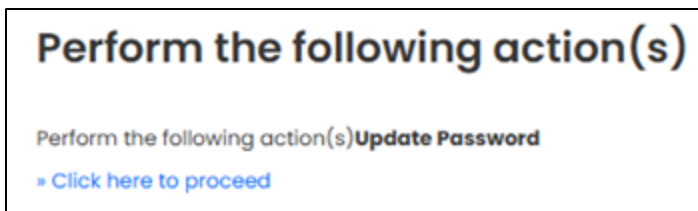
Set up your account and profile

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.

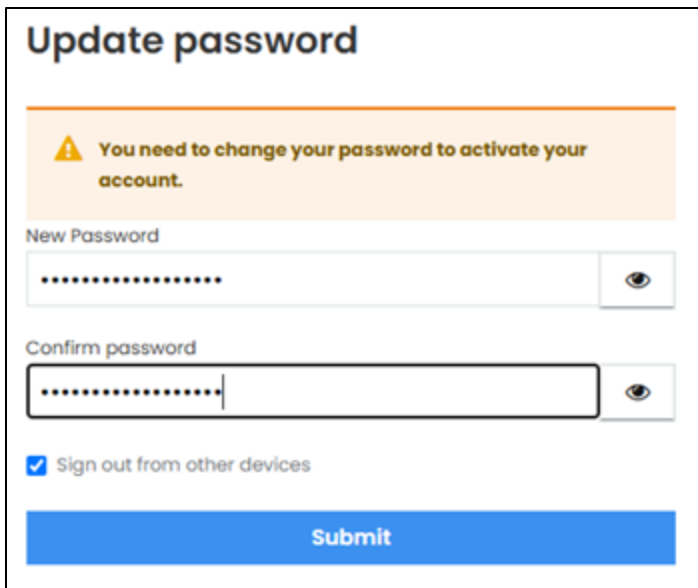


Perform the following action(s)

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

..... 

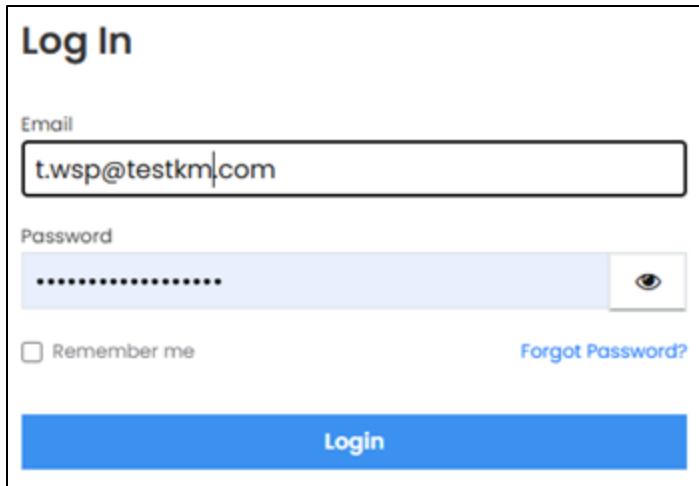
Confirm password

..... 

☒ 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 screenshot shows a 'Log In' form with the following elements:

- Log In**: Title of the form.
- Email**: Label for the email input field.
- t.wsp@testkm.com**: Text entered in the email field.
- Password**: Label for the password input field.
-**: Masked password in the password field.
-**: Eye icon for toggling password visibility.
- ☐ **Remember me**: Checkbox and label.
- [Forgot Password?](#): Link for password recovery.
- Login**: Button to submit the login information.

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

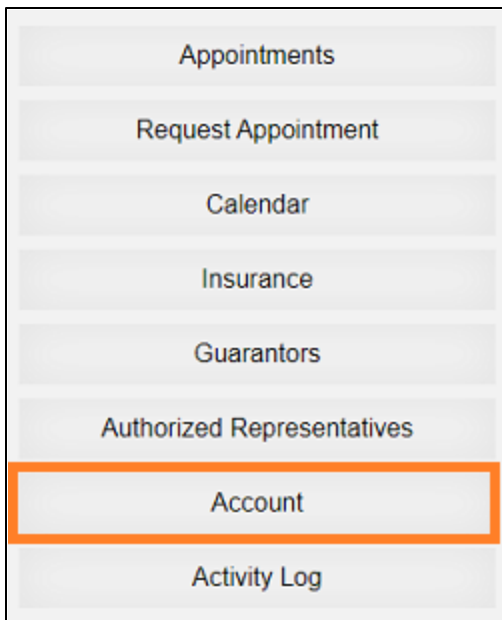
If you forget your password, you can reset it from the sign-in page.

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.

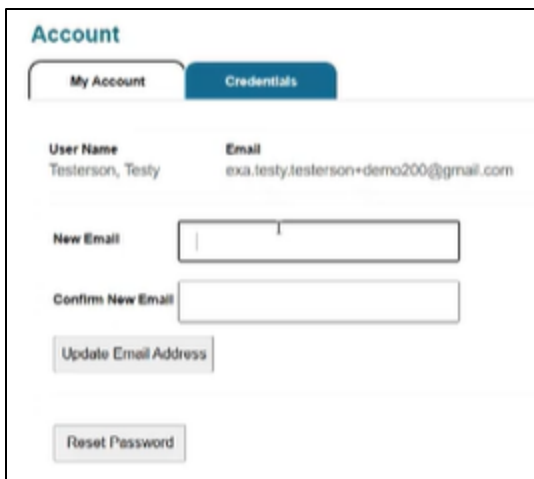
Reset my password

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.

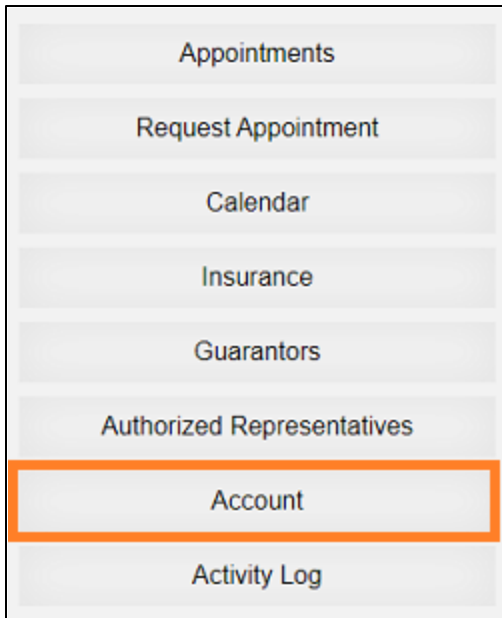


3. When the confirmation prompt appears, select OK.
4. An email is sent with a link to reset your password.

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.

The 'Account' dialog box has a title bar with 'Account' and a close button. It contains two tabs: 'My Account' (selected and highlighted with an orange border) and 'Credentials'. The 'My Account' tab displays 'Patient Information' with the following fields:

Patient Name	Account Number	Date of Birth	Sex
Todd	TW123	12/30/2018	M

Marital Status	Address Line 1	City
Select ▼		

SSN	Address Line 2	State	ZIP
		OR ▼	

Home Phone	Mobile Phone	Work Phone

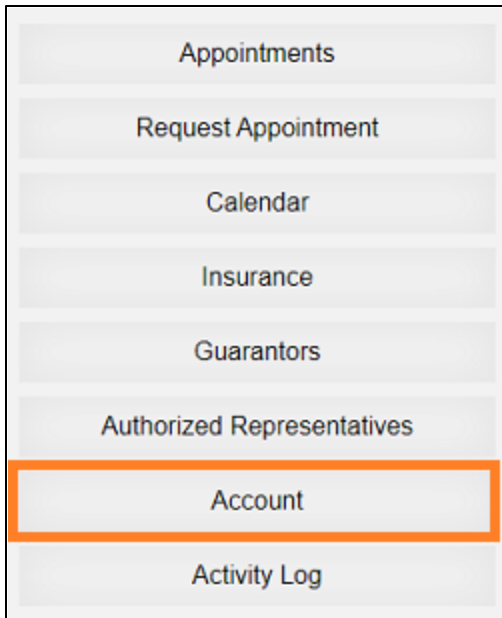
At the bottom are 'Save' and 'Cancel' buttons.

3. Select Save.

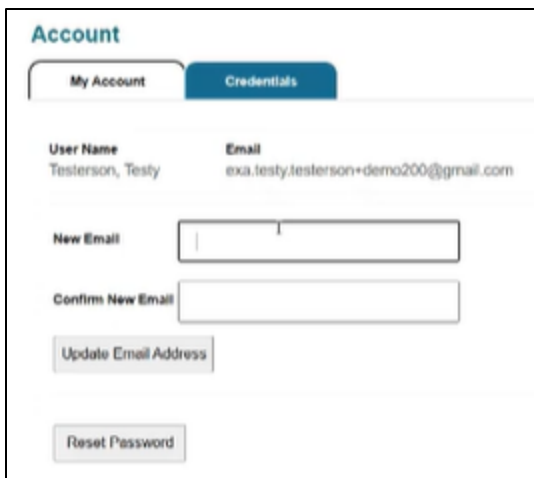
Update an email address

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.

The 'Account' dialog box has two tabs: 'My Account' and 'Credentials'. The 'Credentials' tab is active. It displays the user's 'User Name' as 'Testerson, Testy' and 'Email' as 'exa.testy.testerson+demo200@gmail.com'. Below this are two input fields: 'New Email' and 'Confirm New Email'. At the bottom are two buttons: 'Update Email Address' and 'Reset Password'.

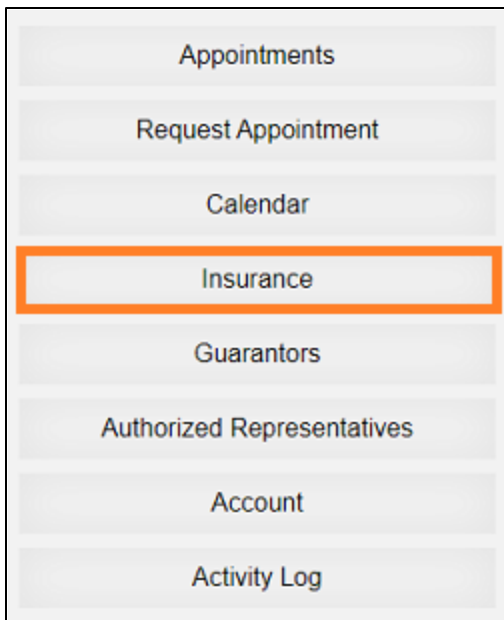
Result: An verification email is sent to the address you entered.

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

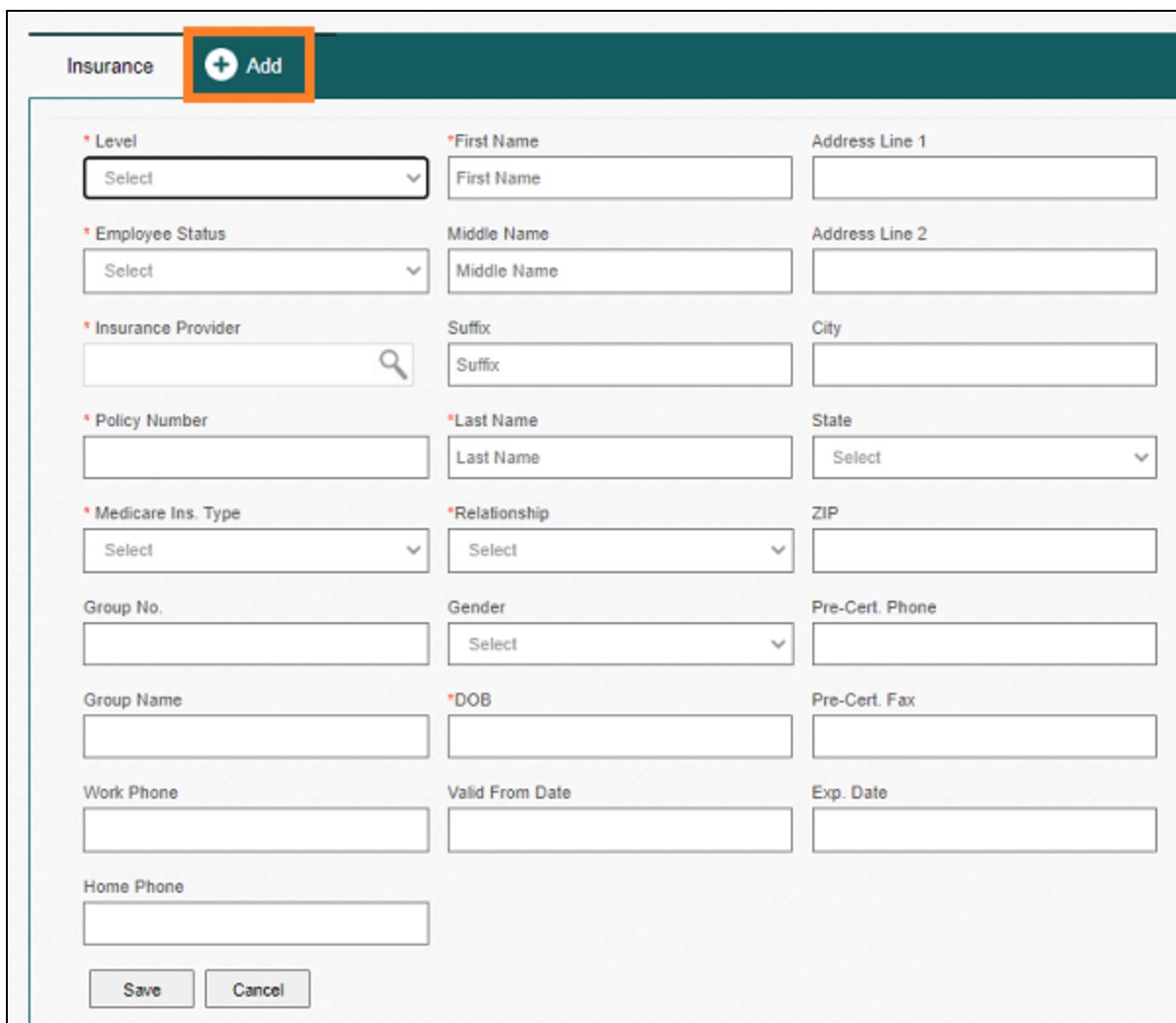
Add an insurance policy

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.

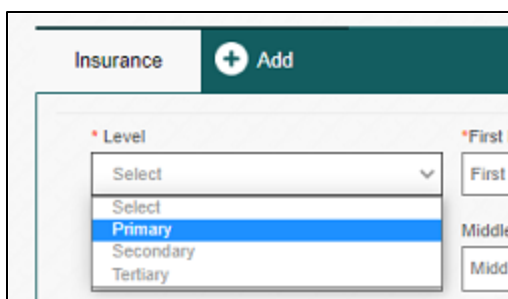


The screenshot shows the 'Insurance' form in the patient portal. The form is titled 'Insurance' and has a '+ Add' button highlighted with an orange box. The form contains several fields for entering insurance information:

- * Level:** A dropdown menu with 'Select' as the current option.
- * First Name:** A text input field with 'First Name' as a placeholder.
- Address Line 1:** A text input field.
- * Employee Status:** A dropdown menu with 'Select' as the current option.
- Middle Name:** A text input field with 'Middle Name' as a placeholder.
- Address Line 2:** A text input field.
- * Insurance Provider:** A text input field with a magnifying glass icon.
- Suffix:** A text input field with 'Suffix' as a placeholder.
- City:** A text input field.
- * Policy Number:** A text input field.
- * Last Name:** A text input field with 'Last Name' as a placeholder.
- State:** A dropdown menu with 'Select' as the current option.
- * Medicare Ins. Type:** A dropdown menu with 'Select' as the current option.
- * Relationship:** A dropdown menu with 'Select' as the current option.
- ZIP:** A text input field.
- Group No.:** A text input field.
- Gender:** A dropdown menu with 'Select' as the current option.
- Pre-Cert. Phone:** A text input field.
- Group Name:** A text input field.
- * DOB:** A text input field.
- Pre-Cert. Fax:** A text input field.
- Work Phone:** A text input field.
- Valid From Date:** A text input field.
- Exp. Date:** A text input field.
- Home Phone:** A text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

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



This is a close-up of the 'Level' dropdown menu. The menu is open, showing the following options: 'Select', 'Primary', 'Secondary', and 'Tertiary'. The 'Primary' option is highlighted with a blue background, indicating it is the selected option.

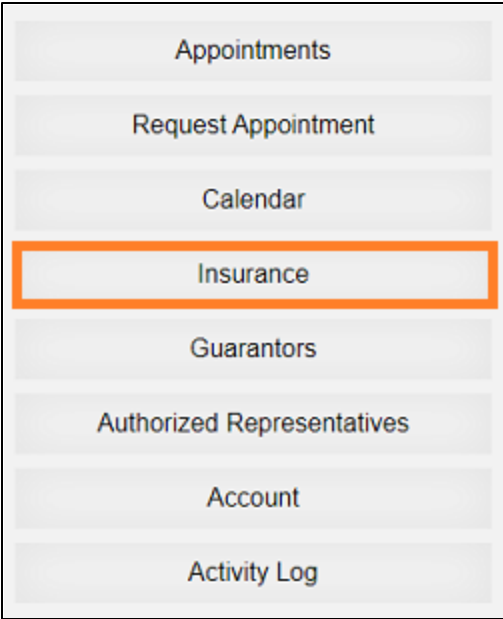
Otherwise, select Secondary for your second policy, or Tertiary for your third policy.

4. Select Save.

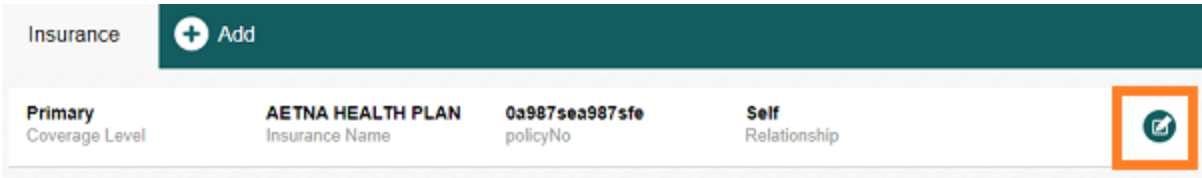
Update insurance information

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.

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.

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

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

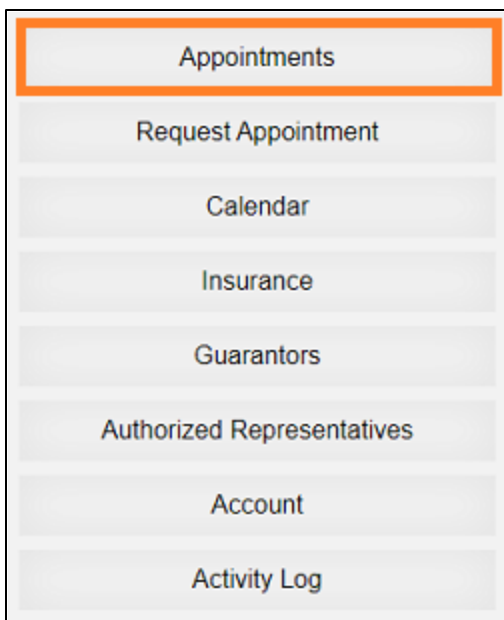
Use the patient portal

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).

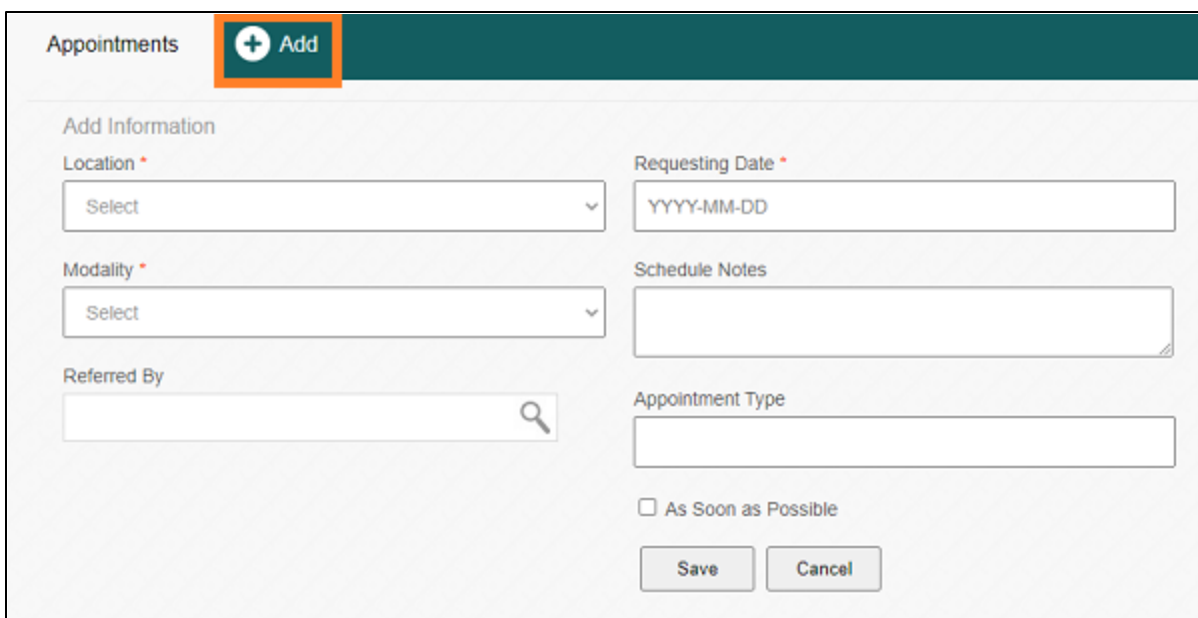
Request an appointment

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.



Appointments **+ Add**

Add Information

Location *
Select

Modality *
Select

Referred By
[Search Field]

Requesting Date *
YYYY-MM-DD

Schedule Notes
[Text Area]

Appointment Type
[Text Field]

☐ As Soon as Possible

Save **Cancel**

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 None

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 AutoApptType	Study Date 2023-05-20 8:00 AM EDT	Fill out appointment forms None

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

- 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.

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

Optional: Repeat to add additional files.

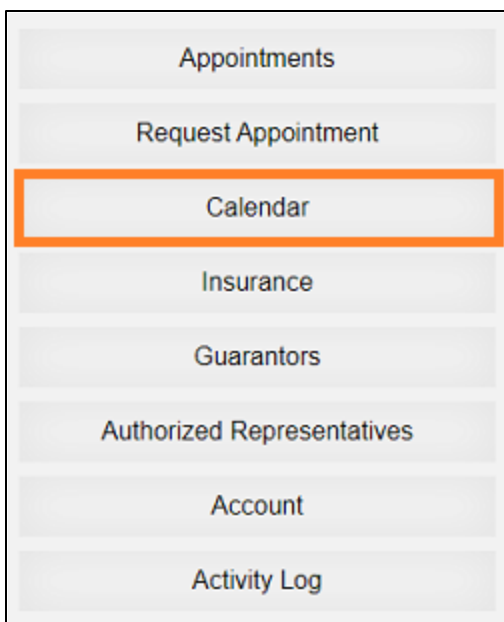
7. In the screen above, select Save.

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

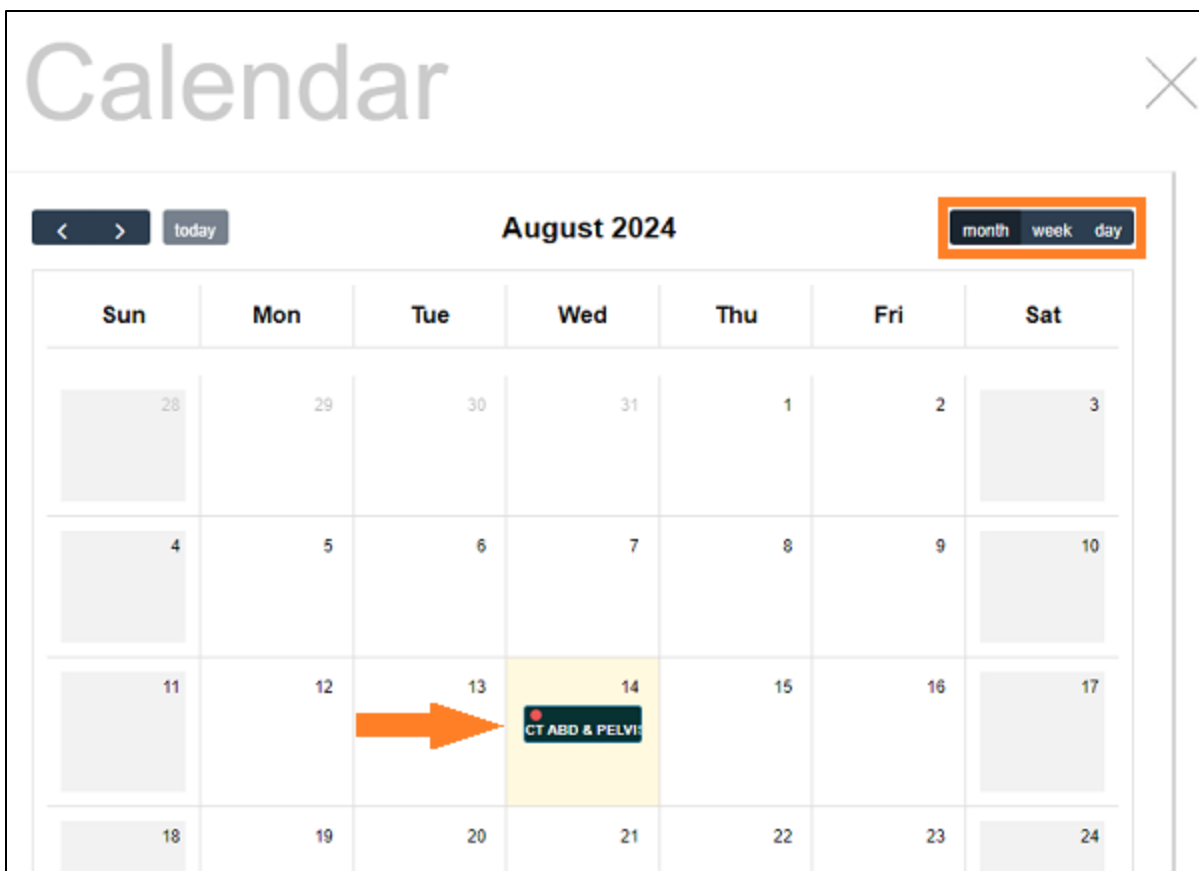
View your appointments in a calendar

You can open a calendar view of your appointments.

- On the left pane, select Calendar.



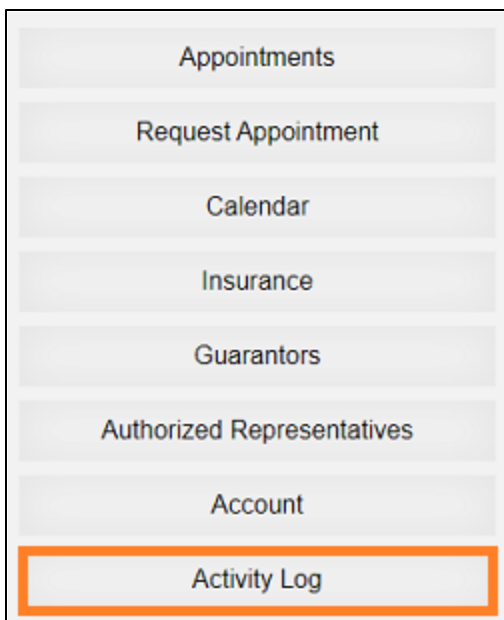
Result: The Calendar of appointments appears.



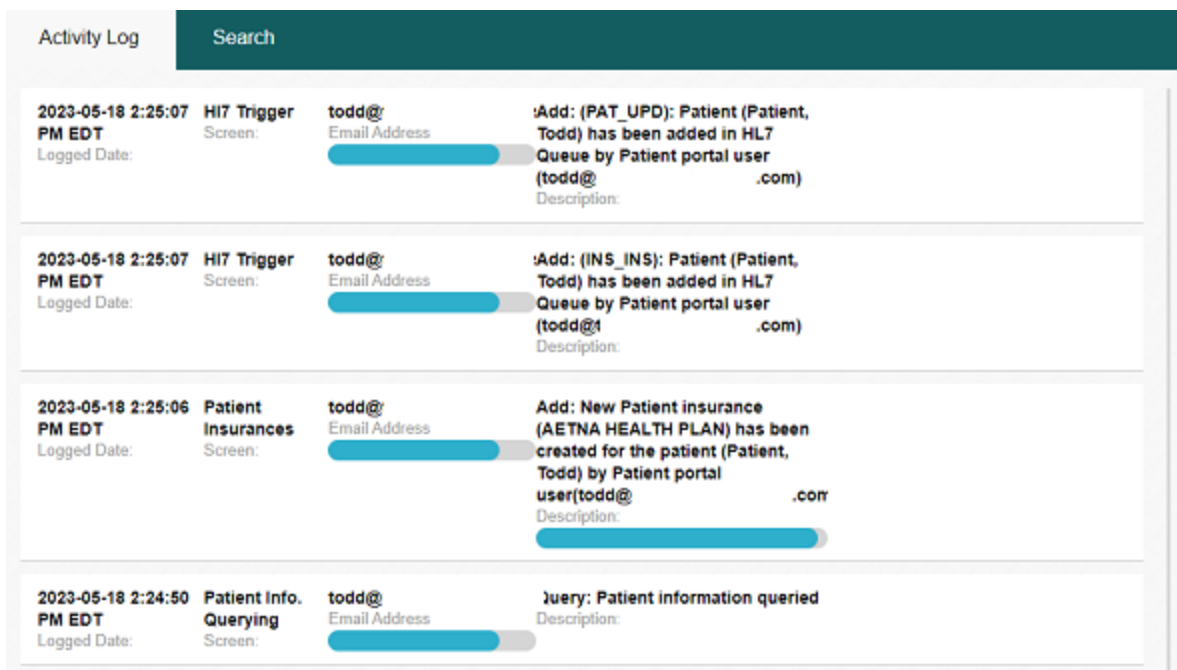
View account activity

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.



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.