



Exa® PACS|RIS

35.0.2

Patient Portal User's Manual

Table of Contents

Welcome to Exa Patient Portal	3
Introduction	3
Get started with Patient Portal	5

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

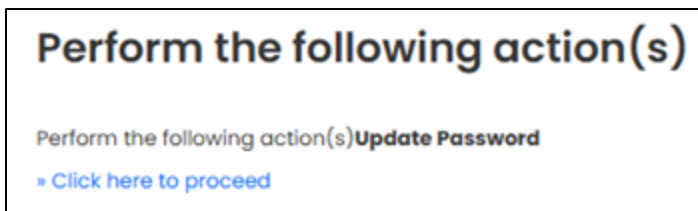
Set up your account and profile

Patient Portal is a website that you can use to view information about your current and past appointments, 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.

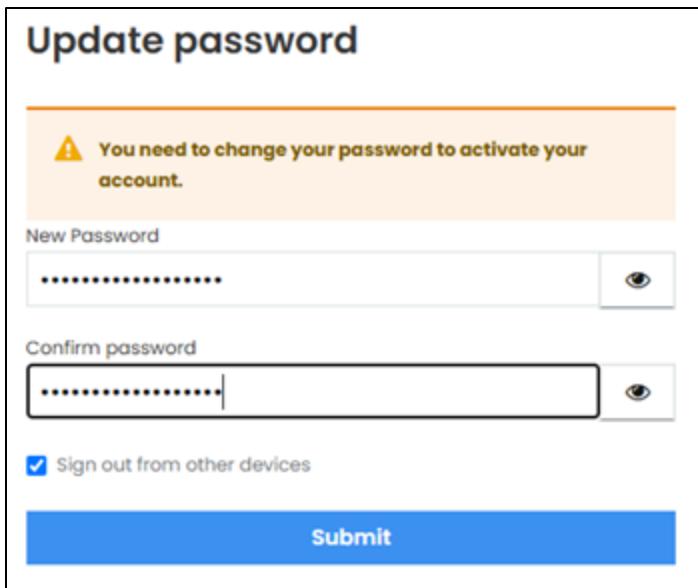


Perform the following action(s)

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

..... 

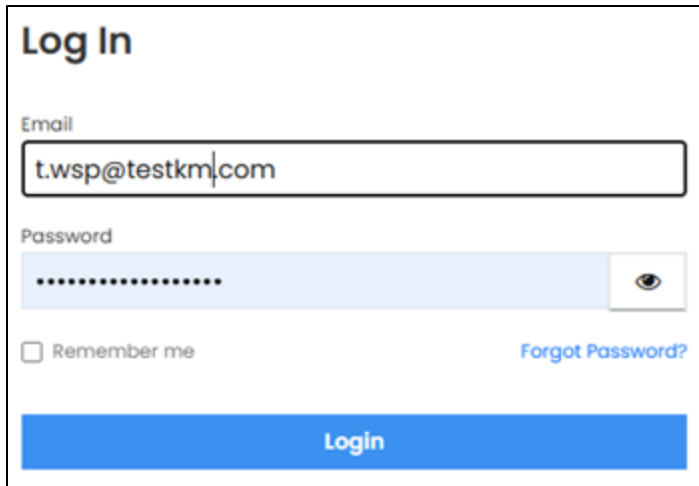
Confirm password

..... 

☒ 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:

- Title:** Log In
- Email:** A text input field containing 't.wsp@testkm.com'.
- Password:** A password input field with masked characters (dots) and a toggle icon (eye) to show/hide the password.
- Remember me:** A checkbox labeled 'Remember me'.
- Forgot Password?:** A blue link text.
- Login:** A large blue button labeled 'Login'.

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

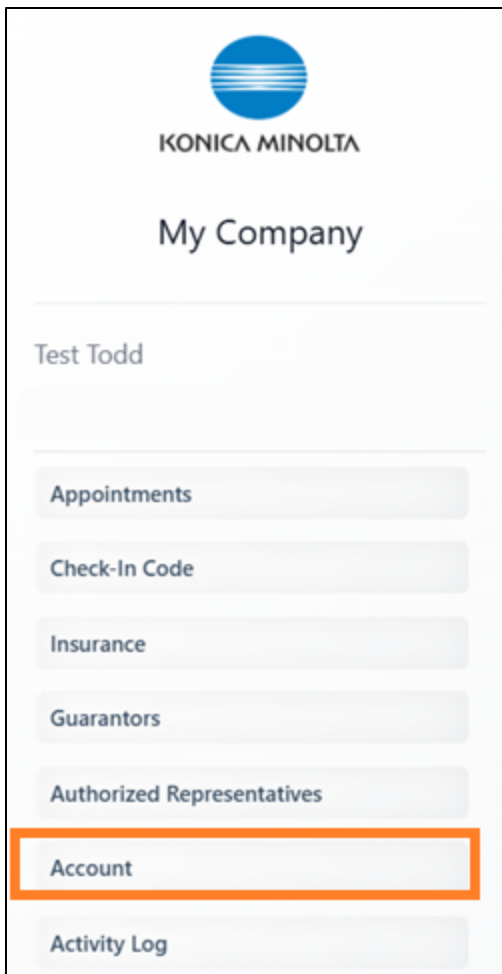
If you forget your password, you can reset it from the sign-in page.

1. On the sign-in page, on the right pane, select Forgot Password?
2. An email is sent to you 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.

Account

My Account **Credentials**

User Name **Email**
Todd, Test paptest281@gmail.com

New Email

Confirm New Email

[Update Email Address](#)

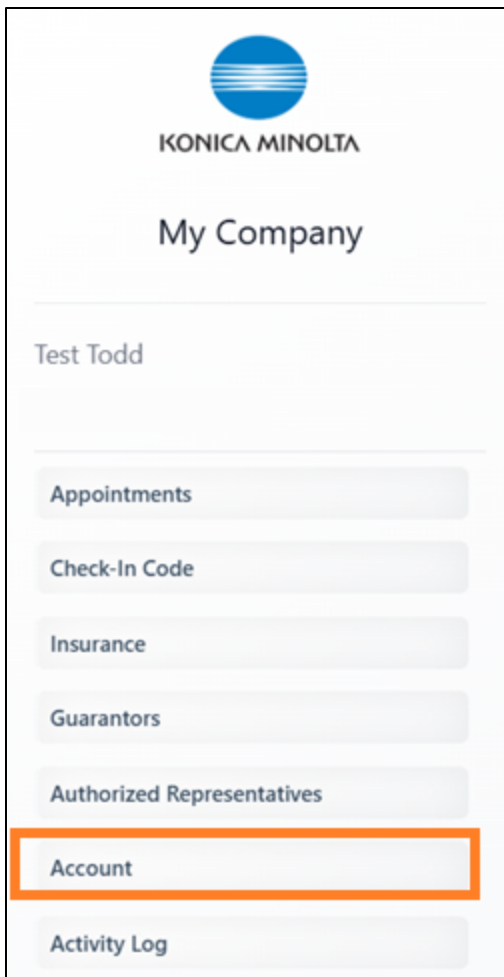
[Reset Password](#)

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.

Account

My Account

Credentials

Patient Information

Patient Name	Account Number	Date of Birth	Sex
Todd, Test	TodT1031	01/03/2000	M

Marital Status	Address Line 1	City
Select		

SSN	Address Line 2	State	ZIP
		Select	

Home Phone	Mobile Phone	Work Phone

Save

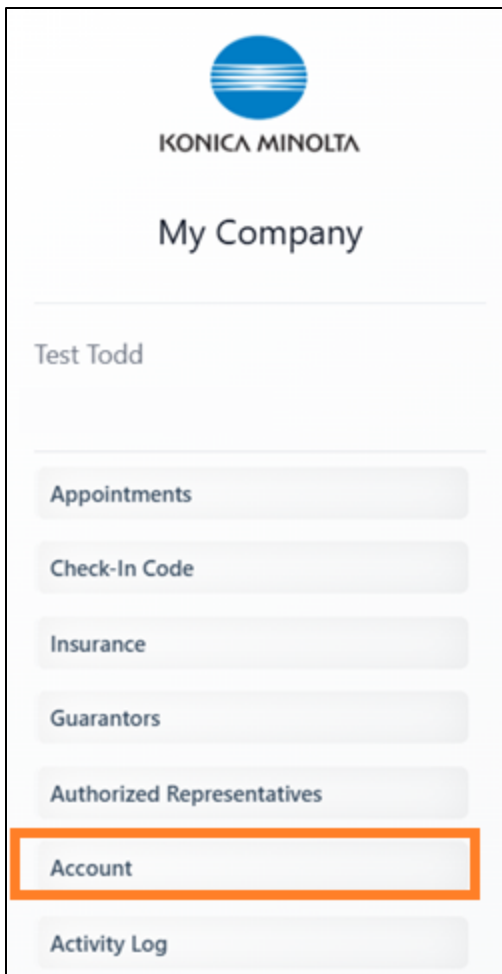
Cancel

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.

Account

My Account **Credentials**

User Name **Email**
Todd, Test paptest281@gmail.com

New Email

Confirm New Email

[Update Email Address](#)

[Reset Password](#)

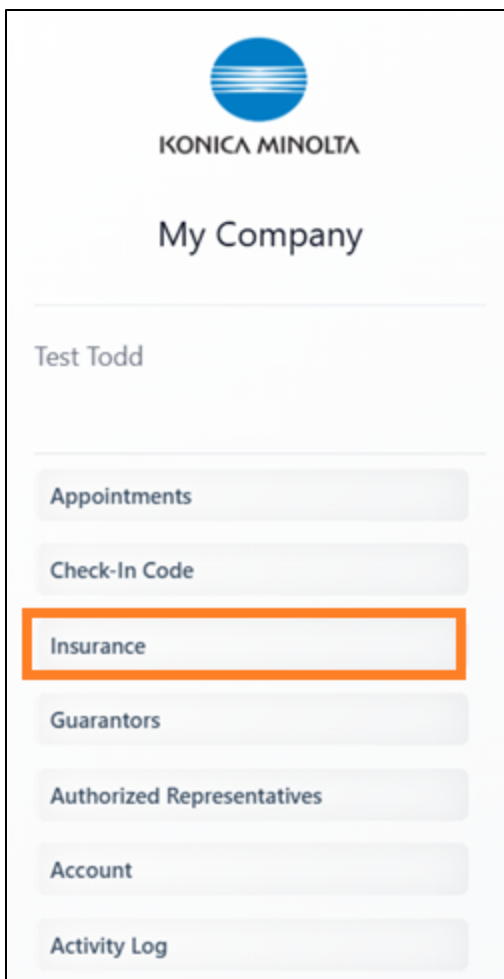
Result: An verification email is sent to the address you entered.

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

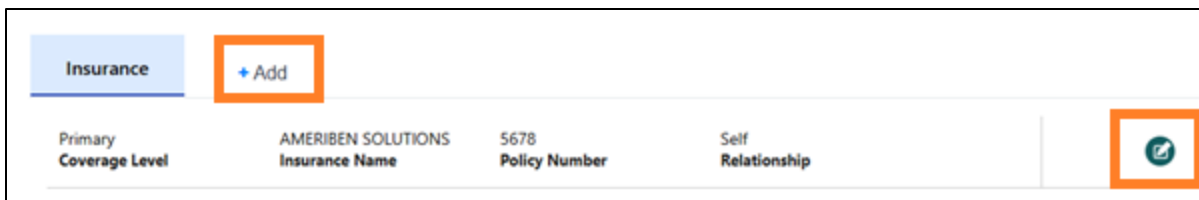
Add or edit an insurance policy

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

1. On the left pane, select Insurance.



2. On the Insurance tab, select Add to add an insurance policy, or select the edit button of a policy to edit.



3. Enter or edit the information as needed.

Level: If this is your only policy, in the Level list, select Primary. Otherwise, select Secondary for your second policy, or Tertiary for your third policy.

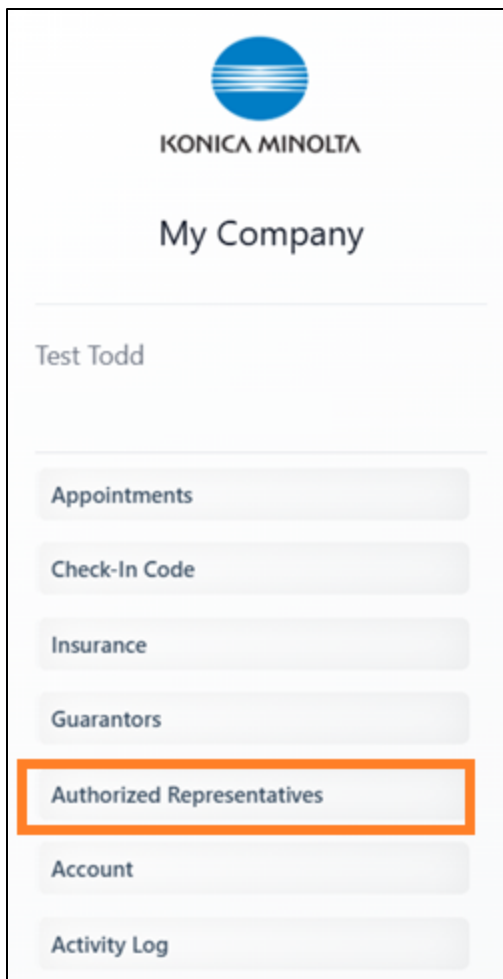
Insurance		
* Level Select	* First Name First Name	Address Line 1
* Employee Status Select	Middle Name Middle Name	Address Line 2
* Insurance Provider	Suffix Suffix	City
* Policy Number	* Last Name Last Name	State Select
* Medicare Ins. Type Select	* Relationship Select	ZIP
Group No.	Gender Select	Pre-Cert. Phone

4. Select 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.

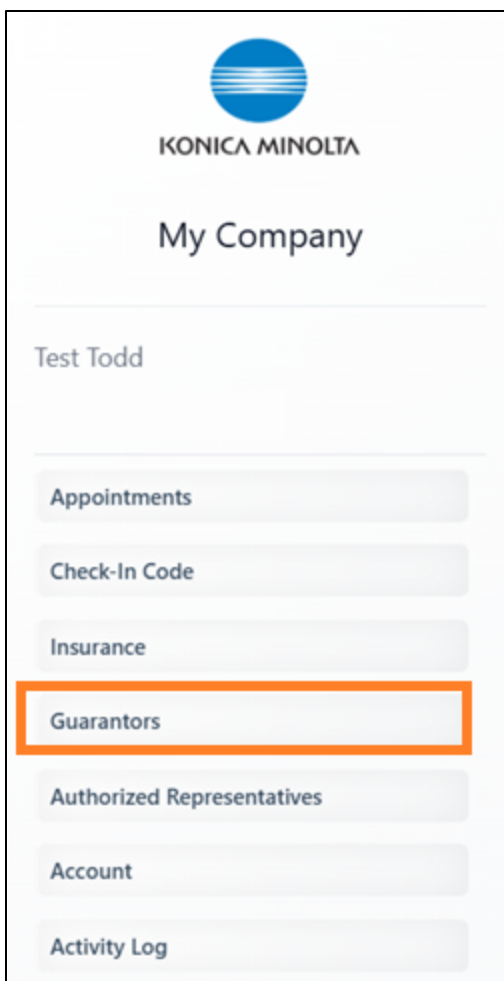


Result: The representatives appear in a list.

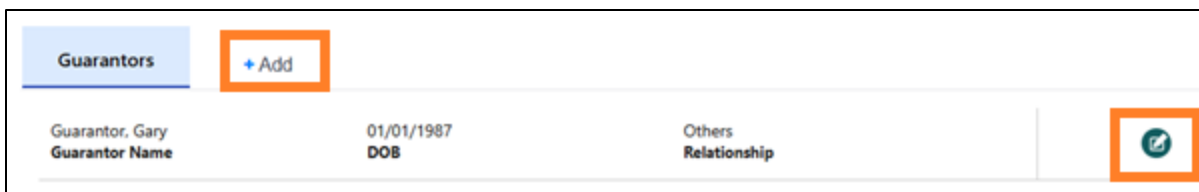
Add or edit a guarantor

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 to add a guarantor, or select the edit button of a guarantor to edit.



3. Enter information about the guarantor. Note: Fields with an asterisk (*) are required.

Guarantors [+ Add](#)

Guarantor, Gary		01/01/1987	Others	
Guarantor Name		DOB	Relationship	

* First Name

Gary

* Relationship

Others

Mobile Phone

MI

Address Line 1

SSN

Suffix

Address Line 2

Home Phone

* Last Name

Guarantor

City

Work Phone

* DOB

01/01/1987

State

IA

Email

Sex

ZIP

Employer

4. Select Save.

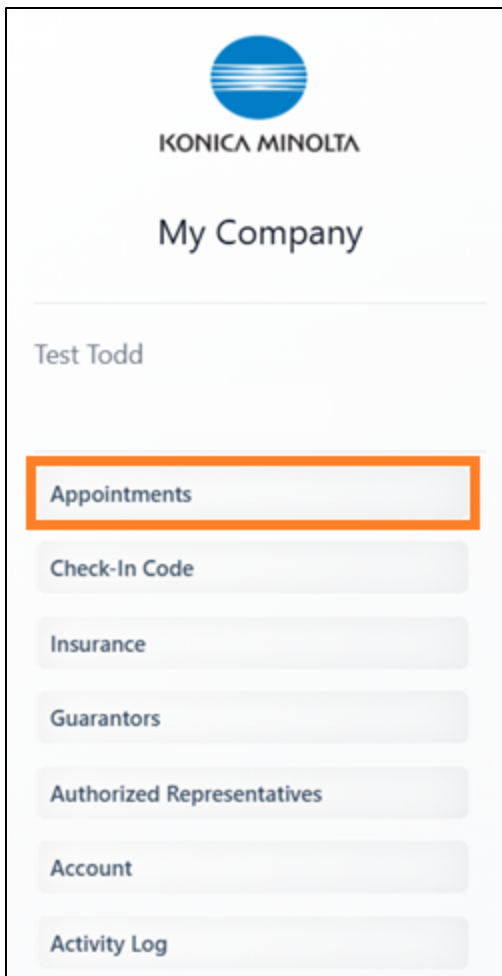
Use the patient portal

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).

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 Scheduled	Office My Company	Study Description CT ABD & PELVIS W/O CONTRAST	Study Date 01/08/2026 1:00 PM EST	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	  
						

3. You can use the following buttons:

 View and print the appointment confirmation card.

 Fill out appointment forms

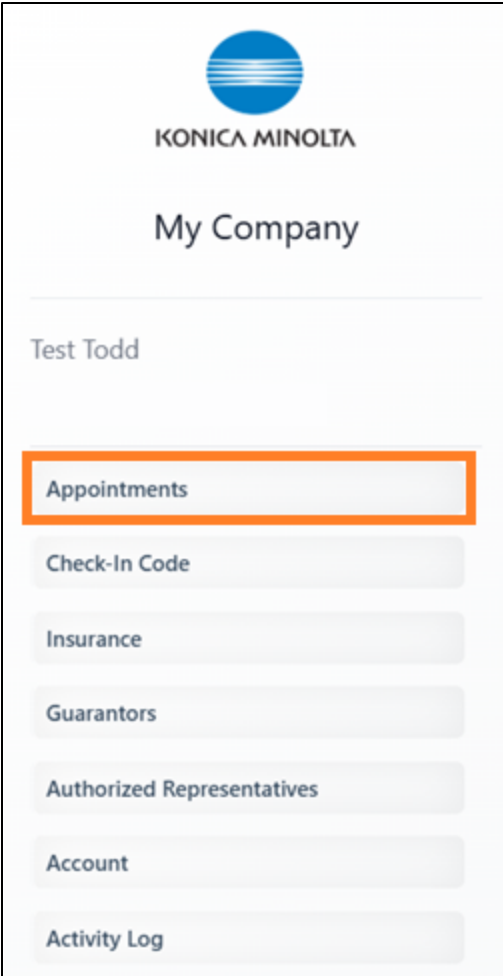
 View images. Opens the study in the OHIF viewer. For instructions on using the viewer, see <https://docs.ohif.org/user-guide/>.

 View approved reports

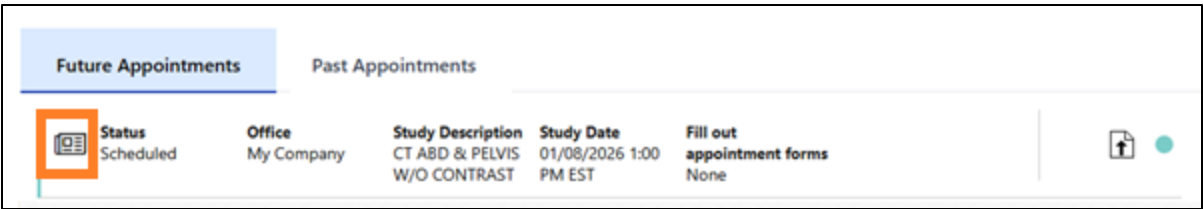
View or print your appointment confirmation

You can view your appointment confirmation, and print it out.

1. In the left pane, select Appointments.



2. Select the Future Appointments tab.



3. Select the icon on the left of an appointment to open the appointment confirmation dialog.

Appointment Confirmation

Patient Information	Referring Physician
Name Todd, Test	Name Reffering, John
Address	Address 807 First Floor Mega Cross Street
City	City Alabama
State	State
Postal Code	Postal Code 78004
Home Phone	Phone
Cell Phone	Fax No.
Email	
Exam Details	Exam Prep Instructions
Description CT ABD & PELVIS W/O CONTRAST	
Arrival Time 01/08/2026 1:00 PM EST	
Scheduled Date 01/08/2026 1:00 PM EST	

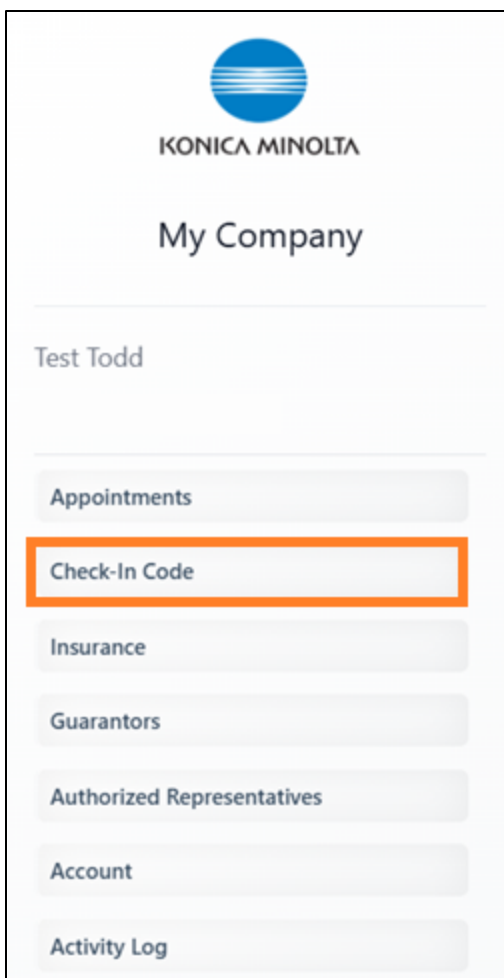
[Print](#)

4. To print the appointment confirmation, select Print.

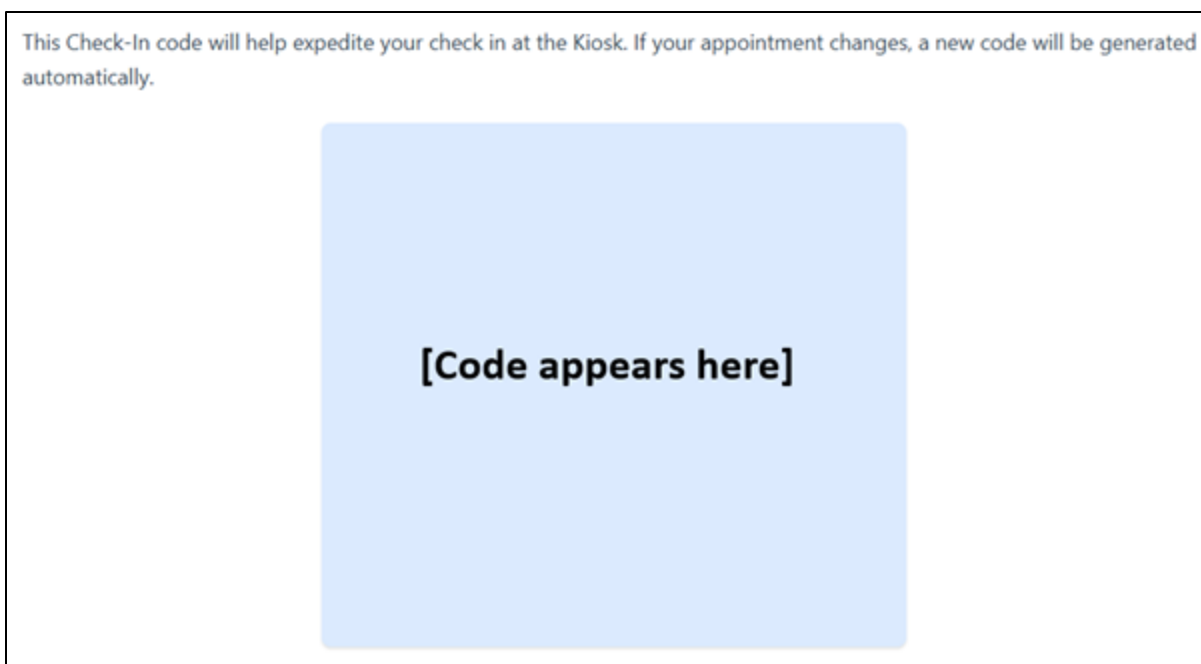
Get a check-in code

You can get a check-in code for your next appointment. When you arrive at the appointment, you enter the code at the patient kiosk for easy check-in.

1. In the left pane, select Check-In Code.



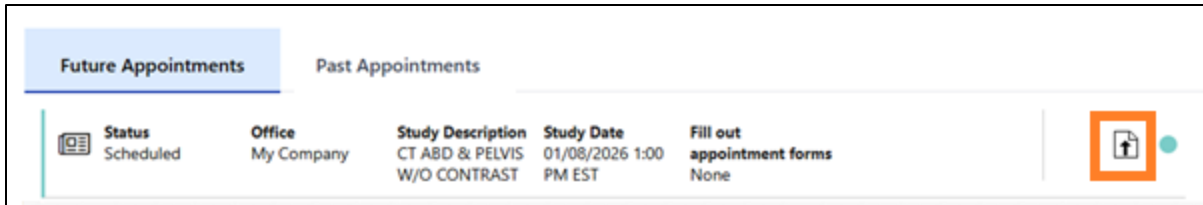
Result: The check-in code appears in the right pane.



Upload a document

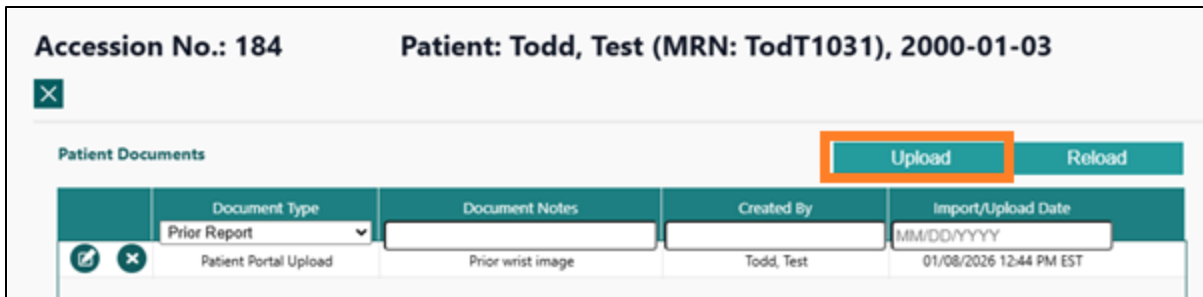
You can send documents to your healthcare provider such as scans of your insurance card, forms, and reports from prior exams by uploading them in the patient portal.

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 CT ABD & PELVIS W/O CONTRAST	Study Date 01/08/2026 1:00 PM EST	Fill out appointment forms None	

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



Accession No.: 184 **Patient: Todd, Test (MRN: TodT1031), 2000-01-03**

Patient Documents

Upload **Reload**

	Document Type	Document Notes	Created By	Import/Upload Date
	Prior Report			MM/DD/YYYY
	Patient Portal Upload	Prior wrist image	Todd, Test	01/08/2026 12:44 PM EST

- 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.

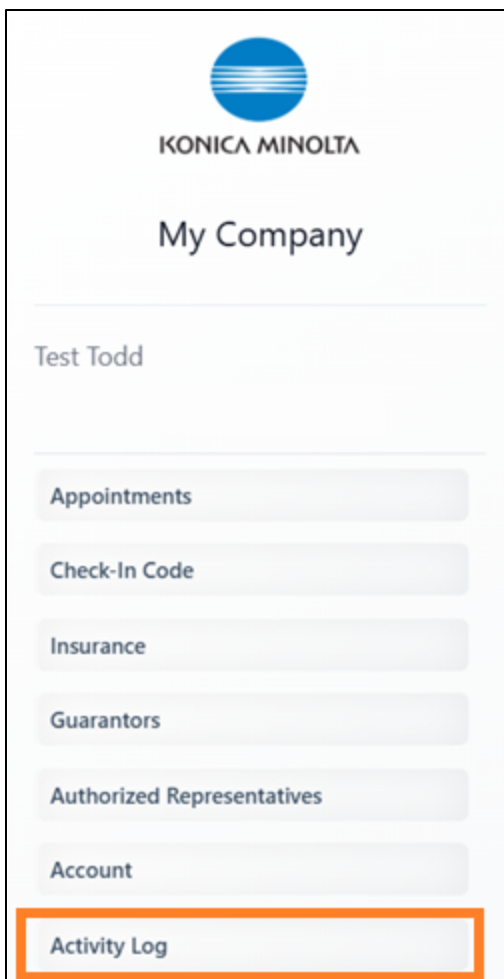
The screenshot displays the 'Patient Documents' section of a patient portal. At the top, it shows 'Accession No.: 184' and 'Patient: Todd, Test (MRN: TodT1031), 2000-01-03'. Below this is a close button (X). The 'Patient Documents' header is followed by a 'Document Type' dropdown menu set to 'Patient Portal Upload'. To the right, the file name 'Dicom.png' and size '13.67 MB' are listed. Action buttons include 'Save', 'Back', and 'Remove'. A 'Notes' section contains a text area with the text 'Prior wrist image'. At the bottom, a message states 'Maximum file size: 20 MB' and a 'Select Files' button is highlighted with an orange border.

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 account activity

To see a history of activity on your account:

1. On the left pane, select Activity Log.



Result: Activity entries appear in a list.

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

Select a search category of Logged Date, Screen Name, Email Address, or Log Description, type search criteria, and then select the blue Search button.

Activity Log

Search

Logged Date: | Screen Name | Email Address | Log Description

mm/dd/yyyy

Search

01/08/2026 12:48:42 PM EST	Patient Guarantor	paptest281@gmail.com	New guarantor (Guarantor, Gary) added to the patient (Todd, Test) by Patient portal user (paptest281@gmail.com)
Logged Date:	Screen:	Email Address	Description:
01/08/2026 12:44:54 PM EST	Patient Documents	paptest281@gmail.com	Add: New patient document (Patient Portal Upload) created
Logged Date:	Screen:	Email Address	Description:

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.