

MyChart Patient Quick Start Guide

Welcome to MyChart	3
Access MyChart	3
Sign up for a MyChart account	3
Log in to MyChart	4
What if I forget my MyChart username or password?	4
Health	5
View your test results	5
Manage Your Medications	5
View a summary of your health information	6
Respond to questionnaires from your clinic	6
Messaging	7
View messages from your clinic	7
Ask your doctor for medical advice	7
Visits	8
View your past or upcoming appointments	8
Schedule or request an appointment	8
Cancel an appointment	8
Family Access	9
Access a family member's record	9
Invite someone else to access your record	9
View and print your child's immunization record	9
View your child's growth charts	10
Medical Record Access and Sharing	11
View, download, or send visit records	11
Download medical records you've requested	11
Share your medical information with someone else	11
See your medical information from other healthcare organizations	12
Billing and Insurance	13
View your outstanding balance	13
Make a payment for an outstanding account balance	13
Sign up for paperless billing	13
Review and update your insurance information	13

- Preferences and Administrative Features 14**
 - Personalize MyChart 14
 - Update your personal information 14
 - Customize your notification preferences 14
 - Change your MyChart password..... 14
 - Protect your account with two-step verification..... 15
- Mobile Apps 16**
 - Download the MyChart app..... 16
 - Connect your MyChart account to Apple Health 17

Welcome to MyChart

MyChart provides you with online access to your medical record. It can help you participate in your healthcare and communicate with your providers.

With MyChart, you can:

- View all of your health information in one place. See your medications, test results, appointments, and more all in one place, even if you've been seen at multiple healthcare organizations.
- Quickly schedule appointments and find care. Make appointments at your convenience.
- Connect with a doctor no matter where you are. Send a message, or arrange to follow up in person, depending on the level of care you need.
- Take care of your children and other family members. Stay on top of everyone's appointments and check in on family members who need extra help, all from your account.

This guide provides an overview of many of MyChart's features and how to use them.

Access MyChart

- On your computer, go to <https://mychart.carene.org/MyChart>.
- On your mobile device, download the [MyChart](#) app.

Sign up for a MyChart account

To sign up for MyChart, you must be at least 13 years old. There are several different methods of MyChart signup that might be used by different departments across the organization:

- Clinic staff might sign you up directly while you're at the front desk or in the exam room.
- You might receive a MyChart activation code on your After Visit Summary.
- You might receive a email with an activation code when you come in for a visit
- You might be able to use self-signup online to create a MyChart account by matching your information against what is on file in your medical record or with third-party identity verification.

Activate your account using Self-Signup if you don't already have one

If you don't have an activation code, you can request one online. To request an activation code online:

1. On the MyChart login screen on the MyChart website or mobile app, click **Sign Up Now**.
2. Click **Sign Up Online**.
3. Using the Online Self-Signup, complete the necessary demographic information. Once completed you will be sent to Experian where additional questions will need to be answered.
4. Once Experian verifies your identity, you will be prompted to create a username and password.

Use your activation code to sign up

1. From the MyChart login screen on the MyChart website or MyChart mobile app, select **Sign Up Now**.
2. Enter your activation code, the last four digits of your Social Security number and your date of birth. Select **Next**.

3. On the next page, choose the following:
 - **MyChart username.** Choose something that others wouldn't be likely to guess but is easy for you to remember. It cannot be changed at any time.
 - **Password.** Choose a unique combination of numbers and letters, using both uppercase and lowercase letters. Your password must be different from your MyChart username. Choose a password that you don't use for other websites.
4. On the next screen, choose whether you want to receive a notification message in your personal email when there is new information available in your MyChart account. If you opt to receive email alerts, enter your email address.

Log in to MyChart

1. In your web browser, enter <https://mychart.carene.org/MyChart> and access the login page.
2. Enter your MyChart username and password, and click **Sign In**.

What if I forget my MyChart username or password?

Click the **Forgot Username?** or **Forgot Password?** link below the login fields for assistance. You will be prompted to answer some demographic questions. If you fail to recover your password after 5 unsuccessful attempts, you will be directed to reset your password. If you have after 5 unsuccessful attempts at resetting your password, your account will be deactivated and you'll need to contact your doctor's office.

Health

View your test results

With MyChart, you can view test results as soon as they become available, rather than waiting for a phone call or letter from your physician. To view test results, go to **My Record > Test Results**. Select a test to see more information about it, such as:

- The standard range for the result
- Any additional comments your provider entered about the result



If you're looking for a specific result, enter key words in the search field on the Test Results page.

Receive email when new results are available

1. Go to **Account Settings > Communication Preferences**.
2. Expand the Health section and select a notification option next to Test Result.
3. Update your email address if needed at the bottom of the page.

Manage Your Medications

View your current medications

Go to **My Record > Medications** to see all of your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the physician who prescribed the medication. You can view additional information about a medication, such as precautions to consider when taking the medication and potential side effects, by clicking the **Learn more** link.



- Remove a medication you're no longer taking by clicking **Remove** and then adding comments about why you're no longer taking that medication.
- Add a new medication by clicking **Report a Medication** and then adding comments about why you're taking the new medication.

Your chart will be updated after your healthcare provider reviews the change with you at your next visit.

Request a medication refill

1. From the medication list, click **Request Refills**.
2. Select the check box next to the medication you need refilled and enter any comments. Click **Next**.
3. Select a delivery method, pharmacy, and pickup date and time that's convenient for you, if applicable. Click **Next**.
4. Review the details of your refill request and click **Submit**.

You will receive a message in your MyChart Inbox when your prescription refill is processed.

View a summary of your health information

To get a summary of your medical record, go to **My Record > Health Summary**. This summary includes:

- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care

Respond to questionnaires from your clinic

Your clinic might make questionnaires available from MyChart so you can complete them online instead of filling out a form when you get to the clinic.

You might be able to respond to questionnaires in three different places:

- Open generally available questionnaires from **My Record > Questionnaires**.
- If your doctor wants you to complete a questionnaire for an upcoming appointment, go to **My Record > Visits**. Locate the upcoming appointment and click **Details**. Open the questionnaire by clicking its name in the Questionnaires section of the appointment details.
- If your doctor sends you a MyChart message with an attached questionnaire, open it by clicking the questionnaire link near the top of the message.

If you need to close a questionnaire before you finish it, click **Finish Later** to save your progress.

Messaging

View messages from your clinic

You can read any messages sent by your doctor or other clinic staff by going to your Inbox (**Communication > Messages**).



If you're looking for a specific message, enter key words in the search field on the Inbox page.

Receive emails when new MyChart messages are available

1. Go to **Account Settings > Communication Preferences**.
2. Expand the Messages section and select a notification option.
3. Update your email address and mobile phone number if needed at the bottom of the page.

Ask your doctor for medical advice

If you have a non-urgent medical question, you can send a message to your doctor's staff members. This message is secure, meaning your information stays private as it is sent over the Internet.

You might send a message if you're not sure whether you should come in for an appointment, if you need clarification on the dosage of one of your medications or something that was discussed in a recent visit, or if you just want advice about a common illness.

1. Go to **Communication > Ask a Question**.
2. Click **New Medical Question**.
3. Select a recipient from the list. This list might include your primary care provider, another doctor with whom you've recently had an office visit, or the general nursing staff at the clinic.
4. Select a subject for your message and enter your question.
5. When you are finished, click **Send**.

Someone at your clinic should respond to you within three business days. If you've opted to receive notification for new messages in your MyChart account, you'll receive a message or push notification letting you know that the clinic has responded to your request.



To view a message after you've sent it, go to **Communication > Messages** and click **Sent Messages**. Messages that have an eye icon have not yet been read by clinic staff.

Visits

View your past or upcoming appointments

You can view your past or future appointments by going to **My Record > Visits**.

Select a scheduled future appointment or click **Details** to see info such as:

- The date, time, and location of the visit
- Any pre-visit instructions from the clinic

For past appointments, you can click **View After Visit Summary**[®] to see a summary of the care you received during your visit. You can also view any of your doctor's visit notes that are shared with you by clicking **View notes**.

Schedule or request an appointment

To schedule or request an appointment, go to **Find Care > Schedule an Appointment**. Depending on the reason for scheduling or type of appointment you choose, you'll be directed to the Schedule an Appointment or Request an Appointment page.

- When you schedule an appointment, you make the appointment yourself and don't need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can choose a location and enter preferred dates and times. Pick an appointment from the list of available time slots to schedule it.
- When you send an appointment request, you're asked to enter the provider you want to see, the reason for the visit, preferred dates and times, and any comments regarding why you are requesting the appointment. After you submit your request, someone from the clinic will contact you to verify an appointment date and time.

Cancel an appointment

Depending on the date and time of your next appointment, you might be able to cancel it through MyChart. If it is too close to your appointment date or time, you'll need to call the clinic to cancel your appointment.

1. Go to **My Record > Visits**, and select the appointment from the list or click **Details**.
2. Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.

Family Access

If you have access to your family members' medical records, you can view most of the information in their records in the same way that you view your own. Some things that might be particularly useful include:

- Viewing or printing your child's immunization record
- Viewing your child's growth charts
- Viewing a family member's test results

If you're a parent, you can have full access to your child's record through 12 years of age and limited access through age 18. This section explains how to access a family member's record and how to access growth charts and immunizations in a child's record.

Access a family member's record

After you've received permission, new or timely information for your family member appears alongside your info in your health feed on the MyChart home page. You can view other information in your family member's record by switching to their chart. From the **Switch** menu, select your family member's name.



You can customize how the names and photos appear for each family member. For more information, refer to [Personalize MyChart](#).

Invite someone else to access your record

1. Go to **Sharing > Share My Record** and select **Friends and family access**.
2. On the Friends and Family Access page, click **Invite Someone** under the Who Can See My Record? section.
3. Enter that person's name and email address, confirms the level of access, and click **Send Invite**. The invitation then appears as Pending at the top of the page.
 - After you send the invitation, the recipient receives an email to notify them that you've invited them to have access to your account. From this email, they can click a link that takes them to a page where they must enter your date of birth to confirm that they know you and accept the invitation.
4. After the person you've invited accepts the invitation, you'll receive a tickler message to let you know, and the Pending label is removed next to that person's name on the Friends and Family Access page. You can return to this page at any time to edit or revoke that person's access.

View and print your child's immunization record

When you are in your child's record in MyChart, go to **My Record > Health Summary** and select the Immunizations tab. You can see the immunizations your child has received and the dates on which she received them. Click the immunization name to learn more.

To open a printer-friendly summary of your child's immunizations, click  .

View your child's growth charts

To view your child's growth charts, open your child's record and go to **My Record > Growth Charts**.

You can customize the view of the growth chart by:

- Choosing a different Chart Set. For example, you can switch between growth charts provided by the Center for Disease Control (CDC) and the World Health Organization (WHO).
- Changing the Chart Type. For example, you can switch the view from length-for-age to weight-for-age or Body Mass Index-for-age.

You can also view the growth chart with a different unit of measure (metric or standard) by selecting the option for that unit of measure.

If you want a copy of the growth chart for your records, click  .

Medical Record Access and Sharing

Epic offers several different features through the MyChart patient portal to allow you to access your health records and share them with other people. For more information about accessing family members' records, refer to [Family Access](#).

View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.

1. Go to **Sharing > Share My Record** and select **Download or send your record**.
2. Select a visit on the **Single Visit** tab or use the **Date Range** tab or **All Visits** tab to select multiple visits. Then:
 - Click **View** to view a copy of the visit summary.
 - Click **Download** to save a copy of the visit summary for your records.
 - Click **Send** to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.

Download medical records you've requested

If you've requested a copy of your medical record from your healthcare organization, you can download and view it from MyChart, rather than having to wait for a paper copy to arrive in the mail.

1. Go to **My Record > Document Center** and click **Requested Records**.
2. Locate the record you want to view and click **Download**.
3. If the record is password protected, you see a message to warn you. Click **Continue Download**.
4. Click **Save** to save the file to your computer and then open it, or click **Open** to open it without saving it to your computer.
5. If the record is password protected, click **Show Password** on the Requested Records page to view the password you need to access the document and enter it to view the document.

Share your medical information with someone else

Share Everywhere is a way for you to share your medical information with the people who are taking care of you. Using your MyChart or MyChart mobile account, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a note back to your health system to help keep your care team informed of the care they provided.

1. Go to **Sharing > Share Everywhere**.
2. Enter the name of the person who will be viewing your record and request the share code.
3. Tell that person to go to www.shareeverywhere.com to enter the code along with your date of birth.

See your medical information from other healthcare organizations

If you've been seen at another healthcare organization, you might be able to view information from that medical record right in MyChart. You might have heard this feature referred to as Happy Together. The information you might see from other organizations includes:

- Allergies
- Care team
- Health issues
- Medications
- Messages
- Test results
- Visits

To view this information, you must link your account. Go to **Sharing > Link My Accounts** to get started. Then, select your account from the list or search for it and click **Link Account**.

After you've linked your accounts, information from the other organization appears in MyChart with a  icon.



For more information about how linked accounts work and what information you can see from each healthcare organization, click the **See our FAQ page** link.

Billing and Insurance

View your outstanding balance

To see the outstanding account balance for any of your accounts, go to **Billing > Billing Summary**. To view additional information about an account, including past statements, click the **View account** link.

Make a payment for an outstanding account balance

1. Go to **Billing > Billing Summary**.
2. Click **Pay Now** for the account on which you want to make a payment.
3. Enter the amount to pay along with your credit card or bank account information. Click **Continue**.
4. Review your payment information and click **Submit Payment**.

Sign up for paperless billing

1. From the Billing Summary page, click the paperless billing alert.
2. If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number and select the corresponding check box to receive notifications.
3. Select the **I understand that I will no longer receive statements in the mail** check box and click **Sign Me Up**.

Review and update your insurance information

To review the insurance information your clinic has on file, go to **Insurance > Insurance Summary**. Click **View coverage details**.

To update your insurance information, make any of the following changes:

- Remove a coverage.
- Add a new coverage. New coverages are submitted for verification when you log out of MyChart.

Preferences and Administrative Features

Personalize MyChart

There are three ways you can personalize how MyChart appears for you and each of your family members. For each account you have access to, you can:

- Specify the color scheme.
 - Change the name that appears under that person's photo.
 - Add or change the photo. Note that photos you upload through MyChart are visible to medical staff, so you should only use a photo that shows each person's face.
1. Go to **Account Settings > Personalize**.
 2. Click **Edit**.
 3. Make any of the changes described above and then click **Save**.



You can also add your photo from the **Switch** menu by selecting **Add Your Photo**.

Update your personal information

You can update your address, phone number, email address, and other personal details at any time so that your clinic always has the most up-to-date information in your record.

1. Go to **Account Settings > Personal Information**.
2. Click **Edit** in the section for the information you need to update.
3. Confirm that your updated information is correct, and then click **Save Changes**.

Customize your notification preferences

MyChart can send you notification by email or text message when there is new information available in your MyChart account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

1. Go to **Account Settings > Communication Preferences**.
2. Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive and click **Save Changes**.
3. Update your email address and mobile phone number if needed.

Change your MyChart password

To ensure that your medical information stays protected, consider changing your MyChart password periodically. To do so, go to **Account Settings > Security Settings**.

Protect your account with two-step verification

You can ensure that your account stays secure even if someone else has your username or password by turning on two-step verification. When this feature is turned on, you must enter a code that is sent to you by email to log in to MyChart, in addition to using your username and password.

When you log in to MyChart for the first time, you might be prompted to verify your email address to enable two-step verification. If you decide to turn off two-step verification instead, you can turn it on again later.

1. Go to **Account Settings > Security Settings** and click **Turn on Two-Step Verification**.
2. Confirm your email address or phone number, enter your MyChart password, and then click **Continue**.
3. Select whether you want to receive the security code to turn on two-step verification by email or text message.

Mobile Apps

MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the MyChart website, allowing you to do all of the following, and more!

- View test results
- Send and receive messages
- Schedule and confirm upcoming appointments and view visit summaries for past appointments
- View your health summary, including allergies, immunizations, current health issues, and medications
- View preventive care procedures and when they are due
- Request medication refills
- View billing statements and pay balances due and visit copays
- Access family members' charts

If you have an iOS device, you can pair it with Apple Watch™. With MyChart for Apple Watch, you can:

- See alerts for new information in MyChart
- View upcoming appointments
- Read messages
- Review your medication list

Download the MyChart app

To install the MyChart app, go to the App Store or Google Play Store and search for "MyChart."

1. On your mobile device, open the Apple App Store (if you have an iOS device) or the Google Play Store (if you have an Android device). Look for one of the following icons to find the app store on your device:



2. Search for **MyChart**. Look for the following logo to make sure you have the right app:



3. Tap **Install**.
4. After you've installed the app, tap **Open** or find the MyChart icon on your device and tap to open it.
5. Select your primary healthcare organization from the list of organizations. If you don't see it right away, you can search for your healthcare organization by name, state, or ZIP code.



You can easily add or switch between your MyChart accounts at different healthcare organizations using the **Switch Organizations** button on the login screen or the **Switch Organization** menu option after you've logged in.

Connect your MyChart account to Apple Health

If your doctor has assigned you a patient-entered flowsheet for tracking your health data, you can connect MyChart to Apple Health to automatically pull in data from other health and fitness apps or devices.

1. In the MyChart mobile app, open the Track My Health activity.
2. Tap **Connect to Health** at the bottom of the screen.
3. Choose the data you want to share with MyChart by tapping the toggle button for each type of data.
4. Tap **Done**. At this point, recent data that was already stored in Health is automatically synced to MyChart.

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