The Patient Portal is a secure website that will allow patients to access medical information from the Electronic Medical Record (EMR), send messages to their providers or complete necessary online forms that can be electronically delivered directly to the EMR.

Patients will not require a portal PIN number to access the RowanSOM home page of the patient portal. This page will allow patients to print new patient forms to bring to their appointment for CB registration and pre-load. Additionally, the portal has a contact us tab for patients to review a complete listing of all RowanSOM practice sites and specialties.

The portal will also contain RowanSOM links to disseminate information to the general public which includes direct url links to RowanSOM marketing and research information.

**Logging On to the Portal**

www.rowan.edu/som/patientportal

RowanSOM staff will generate a PIN for each patient in C-EMR using the PIN Generator encounter type. The EMR will print out a PIN generator document that is to be handed to the patient prior to the patient’s departure.

In order for patients to gain access to the portal, they must have their PIN generator document readily available, they will need the document to access the portal and they must complete the enrollment within 30 days or request a new PIN.

**Welcome to the Patient Portal**

Patients will gain access to the Patient Portal by going to the URL www.rowan.edu/som/patientportal. Upon entry to the RowanSOM home page patients must either click the ‘new users’ red star icon or the ‘Register to gain access to our secure online services’ link to begin the registration process.
Portal Registration
The portal registration screen is the next step in gaining access to the portal. Users must read through the requirements on this page then click on the ‘Please click Here’ link.

Registration Consent
The patient must read and agree to the Registration Consent Form and click the Accept button to continue the registration process.

NOTE - on the consent form there is a link that provides a PDF of the Privacy Practice for Health Information.
Create a New Portal Account
The patient will have to complete the required fields and click the **Save** button to continue the registration process.

**Note:** Employees who are patients MUST NOT use their Rowan email address to sign up for portal access. Employees must use a personal email address to gain access to the portal.
Patient Verification
The patient will click the first radio button indicating that they ‘**I have a PIN for my own chart and I have been seen here before or have an appointment**’ and click the NEXT button to continue the registration process. The PIN number is located on the PIN generator document that is handed to the patient prior to their departure.

**Note:** The second radio button ‘I am verifying the identity of a family member, Use this link to Edit your Account and add family member’ is for family management and is outlined in the family management workflow.

Identity Verification
The patient will verify their identity by completing the required fields on the Identity Verification screen and click the Verify button.

**Note:** The First Name, Last Name, Birth Date, and Gender must be identical to the way it is entered into the EMR.
Verify Identity Complete
The final step of identity verification is an informational page notifying the patient that they have successfully registered for the patient portal. On this page they have the option of clicking the ‘method of contact’ link or any other tabs in the portal.

Patient Portal
After the Patient Portal Registration is complete, the patient will have the option of going to the Homepage of the portal. When a patient is logged into the portal, they will see a preview on the right of their inbox, which will consist of the subject of the last 5 messages sent to them on the Home Page.
Home Tab Includes:

- Request an appointment
- Send Secure message to your provider
- Request a referral
- Update my Demographics
- Find a provider (this is a link to http://theuniversitydoctors.com/)
- Print Adult, Pediatric and Demographic forms
- Links to Additional Rowan SOM Information

Message Center Tab Includes:

- Request an Appointment
- Send a Message to my Provider
- Request a Referral

My Medical Record Tab Includes:

- Personal Information
- Medication
- Pharmacies
- Allergies
- Immunizations
- Health Conditions
- Contacts
- Insurance
- Advance Directives

Medical Forms Tab Includes:

- Adult New Patient Form
- Pediatric New Patient Form
- Annual Exam Form
- Past Medical History
- Review of Systems
- Blood Glucose
- Patient BP Reading
- More Medical Forms

Contact Us Tab Includes:

- A List of all the Departments

My Account Tab Includes:

- Preferred Method of Contact
- Update Personal Information
- Update Portal Account
**EMR**

**Generating a PIN**

The front desk staff must generate a PIN for every patient upon their departure for their appointment. A PIN generator form will be printed upon completion of this encounter type and given to the patient.

**Note:** The PIN will expire in 30 days from the time it was generated. A new PINP will need to be generated after 30 days if a patient has not used the issued PIN number to log into the patient portal. Patients must come into the office to obtain a new PIN number.

**Generate a PIN (PIN Generator Encounter Type)**

1. Open the patient’s chart.
2. Click the **Update** icon located on the tool bar.
3. On the Update Chart window, select the **PIN Generator** as the Encounter Type and click the **OK** button.
4. Click the **Auto Generate** button.
5. Click the **Close** button to close the PIN Generator window to return to the summary screen.
6. Click the **End Update** icon on the tool bar.

**NOTE** - the Summary prompt will display “Generate Portal PIN”.
7. Click the Sign Document button.

**Printing the PIN for the Patient**

8. On the **Document Tab**, highlight the portal document and click the **Print** icon located on the tool bar.
9. Under the **Letters** folder, click **Patient Portal**, then, Adult PIN Letter and click the **Print** button.

10. Click the **Close** button to return to the patient’s chart.
Messaging Tab
After you successfully log into the EMR, click on the messaging tab to access the secure messaging for your location of care. Your user ID and password is a onetime log-in. Enter your EMR user name and generic password of portal123.

1. Log onto EMR.
2. From the user’s desktop, a new tab has been added “Messaging”.
3. Click the Messaging tab.
4. Enter User ID.
5. Enter generic password
6. Click on the Remember my EMR ID.
7. Click on the Log In button.

Note: Please remember to check off the “Remember my EMR ID” box.
Viewing the Messaging Tab
The Messaging Tab consists of a Tool Bar at the top which consists of “Back”, “Forward”, “Stop” and “Refresh” button. These icons work as if they would on any general website. Below these buttons is a menu bar which tells you which mailbox you’re logged into and which folder you’re viewing. There is also a menu bar column on the left which lists the “Messages” options, the “User” options and the “Delegate” options available to the user.

To the right is the messages pane. All incoming messages will be listed in this pane. Below the list of messages is a preview of the current message highlighted. All unviewed (new) messages will appear bolded in the message pane.
Logging on to Shared Inboxes
Messages sent by patients from the patient portal will go to a location of care delegate mail box in the messaging tab (not individual user mailboxes). A delegate log in will be used to access the location of care delegate mailboxes. The shared inboxes will be worked just like the EMR triage folders.

1. Log onto the EMR and click on the Messaging Tab.
2. In the menu column under Delegates, click on the Delegate Log In link.
3. Select the desired Location of Care and click the Log In As Delegate button.
4. Click on the Log In As Delegate button.

Note- Upon entering the message tab right corner of the inbox messaging screen you will see that you are logged on as a delegate and the Location of Care you selected.
Change Delegate
To change from one location of care delegate mailbox to another location of care mailbox you must log out of the current delegate mailbox and log in a different location of care delegate mailbox.

After you click the log out button while in a delegate mailbox, you will be taken to your own mailbox in the messaging tab. To log into another location of care delegate mailbox, click the delegate login button under the “Delegates” heading.

Inbox Features
The Messaging Tab works much like e-mail. Messages within the Messaging tab may require different decisions. Depending on the message in the inbox, the user will need to resolve all messages to completion and/or delete the message. The user can also save a message to the EMR (convert the message to a document) and send to a triage folder or provider desktop.

- **Reply, Reply All and Forward** – are for future functionality
- **Delete** - allows the user to delete the message from the Messaging Tab inbox.
- **Print** - allows the user to print the message from the Messaging Tab inbox.
- **Search** – Allows the user to search messages in the Inbox they are logged into.
Rather than clicking any of the listed buttons above from the Messaging Tab, the user can also select the appropriate action codes from using the keyboard.

**D** - Delete  **E** – Print

**Due to compliance, users are not permitted to Reply, Reply All, or Forward a message.**

**Folders**

All messages are to be resolved from the location of care delegate Inbox to provide optimal patient care. Do not move messages to any other folders.
Sending a Message to a Triage Folder (Save to EMR)

In rare instances users may want to save a message to the EMR that came in through the messaging tab. In this instance user can save incoming messages to the EMR and send them to a triage folder or provider’s desk top for review and sign off. These messages become documents within the legal chart.

**Note:** Once a message has been saved to the EMR, it must be deleted from the location of care delegate inbox.

1. On your desktop, click the Messaging tab.
2. Under the Delegate section, click on Delegate Log In.
3. Highlight the desired Location of Care and click the Log In As Delegate button.
4. Select the desired message in the Inbox Messages and double click to open the message. (You will not see the Action button unless the message has been opened by double clicking on the message)
5. Click the Action button and then click to Save to EMR.
6. At the Select EMR Patient drop down menu, the system will default to the last opened patient chart.
   - **Note:** The user can also search for another patient by typing the name and clicking the search button. Same as you would open a chart in the EMR. Click the Select link to choose the appropriate patient.
7. Click the Select Provider drop down menu and type the desired triage folder/provider and click the Find button.
8. Select the desired triage folder/provider and click the Save to EMR button located in the top left corner.

**Note:** Messages saved to the EMR become documents and a permanent part of the patient’s chart.
**Work Flow:** This document walks staff through the expectation for processing incoming items from the Patient Portal.

<table>
<thead>
<tr>
<th>Patient Portal</th>
<th>Storage</th>
<th>EMR</th>
<th>Staff Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request an Appointment</td>
<td>Delete</td>
<td>Message Tab</td>
<td>Call the patient and delete from the message tab upon the appointment being scheduled.</td>
</tr>
<tr>
<td>Message to Provider</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Process the request and put your notes in the note section of the document if applicable and sign/close the document.</td>
</tr>
<tr>
<td>Request a Referral</td>
<td>Delete</td>
<td>Message Tab</td>
<td>Process the referral request (per department process), call the patient and delete from the messaging tab.</td>
</tr>
<tr>
<td>Adult New Patient Form (Printed from Home page)</td>
<td>Patient Portal</td>
<td>N/A</td>
<td>Upon arrival of the patient, update C-EMR and scan the document into the EMR (Pre-Load Process).</td>
</tr>
<tr>
<td>Pediatric New Patient Form (Printed from Home page)</td>
<td>Patient Portal</td>
<td>N/A</td>
<td>Upon arrival of the patient, update C-EMR and scan the document into the EMR (Pre-Load Process).</td>
</tr>
<tr>
<td>Demographic Form (Printed from home page)</td>
<td>Patient Portal</td>
<td>N/A</td>
<td>Upon arrival of the patient, update CB and scan the document into the EMR.</td>
</tr>
<tr>
<td>Adult New Patient Form</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Compare to C-EMR, update information from form and sign the document. This is used by a patient that is new to a Department not new to RowanSOM (Pre-Load Process).</td>
</tr>
<tr>
<td>Pediatric New Patient Form</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Compare to C-EMR, update information from form and sign the document. This is used by a patient that is new to a Department not new to RowanSOM (Pre-Load Process).</td>
</tr>
<tr>
<td>Demographic Form</td>
<td>Delete</td>
<td>Message Tab</td>
<td>Update CB with items in red and delete from the message tab.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Delete</td>
<td>Message Tab</td>
<td>Print the attached document (Pre-Load Process), scan it into the patients chart as a portal document type.</td>
</tr>
<tr>
<td>Past Medical History</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Compare to C-EMR, update information from form and sign the document. This is used by a patient that is new to a Department not new to RowanSOM (Pre-Load Process).</td>
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<tr>
<td>Review of Systems</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Compare to C-EMR, update information from form and sign the document. This is used by a patient that is new to a Department not new to RowanSOM (Pre-Load Process).</td>
</tr>
<tr>
<td>Blood Glucose</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Send to a provider’s desk top for review and sign-off.</td>
</tr>
<tr>
<td>Patient Blood Pressure</td>
<td>Save/EMR Document</td>
<td>Triage Folder</td>
<td>Send to a provider’s desk top for review and sign-off.</td>
</tr>
<tr>
<td>Preferred Method of Contact</td>
<td>Delete</td>
<td>Message Tab</td>
<td>Update CB with items in red and delete from the message tab.</td>
</tr>
</tbody>
</table>