



Proxy Access — Helping With a Parent's Patient Portal the Right Way

Helping With a Parent's Patient Portal the Right Way

————— **An Extended Guide · No. 1753** —————

Tech Made Simple. Service Made Personal.

Bill Davis — Bill's Home Tech

(330) 200-8042 · bill@billshometech.com · Atwater, Ohio

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SUMMARY

The 60-Second Version

If you read one page first, read this. Proxy access (some systems call it "shared access" or "friends and family access") lets you see and help with a loved one's patient portal through your own account — no password-sharing, no pretending to be them. Most health systems in our area run on a portal called MyChart, and the idea works the same across them.

- The fastest path is the one your parent starts: they invite you by email from inside their portal, and you accept it in your own account.
- You'll each usually need your own portal login first — yours is free to make.
- Access can be full (see and do nearly everything) or view-only, depending on what they choose and what the system allows.
- If your parent can no longer make that choice, you go through legal authority — a power of attorney or guardianship — with a form and photo ID at the medical-records office.

WATCH OUT

This is information about the technology, not medical or legal advice. I help you set up the access and find the right buttons. What a test result means is a question for your doctor or nurse; whether a power of attorney is in order is a question for a lawyer. And in any emergency, call 911 — don't sit waiting on a portal message.

THE BASICS

1. What Proxy Access Actually Is

Your own door into their chart, with their permission.

Proxy access is a simple idea wrapped in a formal word. "Proxy" just means you're acting on someone's behalf. In a patient portal, it means your parent or spouse gives you permission to see parts of their health record and help with the day-to-day — the results, the messages, the appointments — using your own login, not theirs.

That distinction matters more than it sounds. When you have real proxy access, the portal knows it's you helping, and it keeps a clear line between your account and theirs. Nobody has to hand over a password, and nobody has to guess who did what. It's the difference between being given a key and climbing through a window.

GOOD TO KNOW

Different health systems use different names for the same thing — "proxy," "shared access," "caregiver access," or "friends and family access." They all point to the same tidy idea: helping, under your own name, with permission.

WHY BOTHER

2. Why Not Just Share the Password

The shortcut that causes trouble later.

Plenty of families just share the password. Mom writes it on a card, you log in as her, and it works — until it doesn't. The portal can't tell you apart from her, so her messages to the doctor look like they came from her, and a security prompt sent to her phone leaves you stuck at the login screen.

Real proxy access avoids all of that. You get your own login that stays yours even if she changes her password. You can have access to more than one person — a parent and a spouse, say — and switch between them. And if the day comes when access needs to end, it's a clean switch, not a scramble to change passwords.

TIP

If you've been sharing a password up to now, that's all right — lots of families start there. Setting up proper proxy access is the upgrade, and it usually takes one quiet afternoon together.

FIRST THINGS

3. You Each Need Your Own Account

The step people skip, then wonder why it won't work.

Here's the piece that trips people up. For the smooth, patient-invited path, both of you usually need your own portal account first — your parent with theirs, and you with yours. Your account is free to create and doesn't require you to be a patient at that health system, though some systems do ask you to verify who you are.

- Make sure your parent's account is already set up and they can log in to it.
- Create your own account at the same health system's portal, with your own email and password.
- Use an email you check often — the invitation and later alerts come there.

GOOD TO KNOW

If your parent is a patient at two different health systems, each one has its own portal and its own proxy setup. Access at one doesn't carry over to the other — you set it up once per system.

THE FAST WAY

4. The Patient-Invited Path, Start to Finish

The quickest route when your parent can still consent.

When your parent is able to tap a few buttons, this is far and away the easiest route. They start it from inside their own account by inviting you, and you finish it from inside yours. No forms, no office visit, often done in ten minutes at the kitchen table.

- 1 On your parent's account, open the menu and look for a sharing area — often called "Sharing Hub" or "Share My Record."
- 2 Choose the "friends and family access" option and enter your name and email to send the invite.
- 3 Check your own email for the invitation and open it.
- 4 Sign in to your own account (not theirs) and accept; you may be asked to confirm their date of birth to prove you belong.
- 5 Their record now shows up under your login, usually under a "whose records can I see" switcher.

GOOD TO KNOW

The exact menu names vary by health system. If you don't see "Sharing Hub," look for "Share My Record," "Account Sharing," or anything with the word "share" or "family" in it.

ON THE SCREEN

5. What the Sharing Menu Looks Like

So you know you're in the right place.

People worry they'll click the wrong thing. You won't break anything by looking. On most portals, the sharing controls live behind the menu button — three lines or your parent's initials in a corner — under a heading about sharing or your account.

- On a phone, tap the menu (often three lines or a photo circle), then scroll for anything that says "Sharing" or "Share."
- On a computer, it's usually a link near the top or in an account settings menu.

- Inside, you'll see who already has access and a button to invite someone new.

WATCH OUT

If you hunt for a couple of minutes and still can't find it, don't keep guessing. Each system has a MyChart help page with screenshots, and the medical-records desk can walk you to the exact button. That's a two-minute phone call well spent.

ACCEPTING

6. Accepting the Invitation on Your End

The half people forget to finish.

An invitation isn't access until you accept it. I've seen families set up the invite, feel done, and then wonder a week later why nothing shows up. The invite is only half the handshake; your acceptance is the other half.

- 1 Open the invitation email — it comes from the health system, not from your parent personally.
- 2 Click the link, which takes you to the portal's sign-in page.
- 3 Log in to your own account, or create one right then if you haven't yet.
- 4 Confirm any detail it asks for, like your parent's date of birth, to prove the invite reached the right person.

WATCH OUT

Make sure the link really goes to your health system's own portal before you type a password. A genuine invite points to the same web address you'd use to log in normally. If anything looks off, don't click — go to the portal yourself the usual way, or call the office to confirm.

SWITCHING

7. Switching Between Your Chart and Theirs

One login, more than one person.

Once access is granted, you don't log in and out to move between your own health record and your parent's. You stay signed in as yourself and switch who you're looking at, usually with a tap on their name or photo.

That's the quiet beauty of proper proxy access. If you help both of your parents, or a parent and a spouse, you'll see each of them in the switcher and hop between them. The portal always knows it's you doing the helping, whichever chart is on the screen.

GOOD TO KNOW

Always glance at whose name is at the top before you read a result or send a message. It's an easy, harmless mistake to think you're in Mom's chart when you're in your own — the switcher is right there to fix it.

FULL OR LIMITED

8. Full Access vs. View-Only

How much help is the right amount of help.

Not all access is the same size. Depending on what your parent chooses and what the system allows, your access can be full — seeing and doing nearly everything they can — or view-only, where you can look but not send messages or change appointments.

- Full access usually lets you read results, message the care team, see and schedule appointments, and view the medication list.
- View-only lets you see what's there without acting on it — good when your parent wants a second set of eyes but keeps the wheel.
- Some systems offer settings in between, and some let your parent hide certain sensitive parts from a proxy.

TIP

There's no shame in starting with view-only. It's often the gentlest way in — your parent sees that nothing dramatic happens, trust builds, and you can always ask them to widen it later.

DO WITH CARE

9. Doing This With Consent and Respect

The part that matters more than any button.

I'll be plain here, because it's the heart of the whole thing. This is your parent's health record — their results, their private messages, their history. Proxy access is a gift they give you, not a right you take. The respectful way is also, happily, the official way: they invite you, knowingly and willingly.

Have the conversation before you touch a button. Tell them what you'd like to help with and why, and ask how much they want you to see. Some parents will hand you the keys to everything; others will want you to see appointments but not old records, and that's entirely their call.

GOOD TO KNOW

A parent who feels asked, not managed, is far more likely to let you help — and to keep letting you. The ten-minute conversation is worth more than any shortcut.

WHAT YOU SEE

10. What Proxy Access Lets You See and Do

A tour of what shows up once you're in.

Once you're switched into your parent's chart, you see a version of what they'd see. The exact layout differs by system, but the main pieces are the same, and they're the things families most want a hand with.

- Test and lab results, often with past results to compare against.
- Secure messages to and from the care team.
- Upcoming appointments, with the ability to schedule or cancel if you have full access.
- The current medication list and sometimes prescription refill requests.
- After-visit summaries and instructions from recent appointments.

GOOD TO KNOW

If you send a message to the care team from your parent's chart, it's usually marked as coming from you, the proxy. The doctor's office can see a daughter or son is writing on a parent's behalf — which is exactly as it should be.

RESULTS

11. Seeing a Result Before the Doctor Calls

Why a scary number isn't a reason to panic.

Here's something that surprises families. Under today's federal rules, most test results land in the portal as soon as they're finalized — often before the doctor has had a chance to call. So you may open your parent's chart and see a flagged number nobody has explained yet. That's normal and expected, not a sign something was missed.

A value marked "high" or "low" is measured against a lab's reference range, and those ranges don't account for your parent's whole story. One flagged number out of context can look alarming and mean very little. The calm move is to let the care team interpret it.

WATCH OUT

I can help you find and open a result; I can't tell you what it means. That's your parent's doctor or nurse — they have the full picture. If your parent feels unwell, call the office, or 911 in an emergency. Don't wait on a portal message to hear back.

WHEN THEY CAN'T

12. When Your Parent Can No Longer Consent

The route that goes through legal authority.

The patient-invited path assumes your parent can make the choice to invite you. Sometimes they can't — advanced dementia, a serious illness, a stroke. In that case the portal won't let them send an invite, and access has to go through legal authority instead.

That means you need a document showing you're allowed to act for them — most often a healthcare power of attorney or a court guardianship. With that in hand, the health system can grant you proxy access even though your parent can't click the invite themselves.

WATCH OUT

Whether a given document gives you this authority is a legal question, not a tech one. I can help you work the portal and the forms once you have the paperwork, but whether a power of attorney is valid and covers this is a question for a lawyer or your parent's care team.

THE OFFICE

13. The Medical-Records Route, Step by Step

What the legal-authority path actually involves.

When you go the legal-authority route, you're dealing with the health system's medical-records office — sometimes called Health Information Management, or HIM. They handle the forms and the identity checks that let them open access responsibly.

- 1 Call the medical-records or HIM desk and ask for the proxy or shared-access request form.
- 2 Fill out the form, naming yourself and the patient.
- 3 Gather your photo ID and the legal document — the power of attorney or guardianship papers.
- 4 Submit it in person or however they direct, and ask how you'll be notified when it's approved.

GOOD TO KNOW

This route takes longer than the patient invite — often a few business days while they review the paperwork. Start it before you urgently need the access, not the week of a big appointment.

THE DESK

14. Who to Call at the Health System

The right desk saves you an hour of hold music.

Patient portals are run by the health system, not by a separate company, so the help you need lives inside your parent's hospital or clinic. Knowing which desk to ask for gets you to the right person faster.

- For the patient-invited path and login trouble, ask for portal or MyChart technical support.
- For the legal-authority route and forms, ask for medical records or Health Information Management (HIM).
- Each system also has a MyChart help page online with step-by-step screenshots for exactly their menus.

GOOD TO KNOW

Before you call, have your parent's full name, date of birth, and if you can, their medical record number handy. It's the first thing they'll ask, and having it ready turns a long call into a short one.

LABELS VARY

15. Why the Buttons Don't Match the Guide

Same system underneath, different coat of paint.

Many health systems around here run on the same underlying portal, MyChart — Cleveland Clinic, University Hospitals, and Summa all use it. But each one dresses it up with its own name, colors, and menu wording, so a button called one thing at one place is called something else at another.

That's why this guide describes the ideas — "the sharing area," "the invite" — rather than promising exact words. When the screen in front of you doesn't match, don't assume you're lost. Look for the nearest word that means the same thing, or check that system's own help page.

GOOD TO KNOW

This is also why I won't swear a menu is called exactly "Sharing Hub" at your parent's system. The safest answer is always their MyChart help page or a quick call to their records desk.

PRIVACY

16. Privacy and Boundaries

Access is a trust, not a free-for-all.

Having access to your parent's chart doesn't mean every corner of it is yours to roam. The kind thing, and the right thing, is to use the access for what you agreed to help with, and to leave the rest be unless they want you looking.

- Help with what you discussed — the appointments, the results you agreed to watch — not a full audit of their life.
- Don't share what you see with other relatives unless your parent wants it shared.
- Remember that some sensitive records may be hidden from a proxy by design, and that's the system respecting their privacy, not a glitch.

GOOD TO KNOW

If your parent ever wants to see privately — a conversation with their doctor they'd rather keep to themselves — that's their right, even with you as a proxy. Honoring it keeps the trust that makes all of this work.

SIBLINGS

17. When More Than One of You Wants Access

Several helpers, one parent, no stepping on toes.

Often it's not just you. A sister across the state wants to see the appointments too, and a brother wants the results. The good news is most systems let more than one proxy have access to the same parent — each of you gets your own invite and your own login.

- Your parent can invite each helper separately from their sharing page.
- Each proxy acts under their own name, so the office can tell who sent which message.
- A few systems cap how many proxies one patient can have; if you hit a limit, the records desk can explain it.

TIP

Agree among yourselves who handles what — one person for messages, another for scheduling — so the doctor's office isn't getting three versions of the same question. A quick family text thread saves a lot of crossed wires.

SPOUSES

18. Helping a Spouse, Not a Parent

The same tools, a slightly different feel.

Everything here works just as well for a husband or wife helping each other. In fact, spouses are among the most common proxies — one manages the appointments and the pharmacy while the other rests, and the portal keeps it all straight.

The mechanics are identical: your spouse invites you from their account, you accept in yours. The one thing worth saying out loud is that marriage alone doesn't automatically grant access — the portal still wants the invite, so one partner can't simply assume they're already in.

GOOD TO KNOW

If a spouse becomes unable to consent, the same legal-authority route applies — a healthcare power of attorney and a trip to the records desk, just as with a parent.

YOUR OWN

19. Setting Up Your Own Account First

A short detour that makes everything else work.

If you've never had a portal account of your own, don't let that stop you. Creating one is quick and free. You'll need an email address and a password you'll remember, and you'll answer a few questions so the system knows you're really you.

- 1 Go to the health system's portal sign-up page, or open the invite email and follow its link.
- 2 Enter your name, email, and a password you can recall — or save it in a password manager.
- 3 Verify your identity if asked, by a code sent to your phone or email.
- 4 Once you're in, accept any pending invitation to your parent's chart.

WATCH OUT

Pick a password you don't use anywhere else, and write it somewhere safe or store it in a password manager. If remembering logins is the part you dread, that's exactly the sort of thing I'm glad to set up with you so it never trips you up again.

TWO-STEP

20. The Security Code That Keeps Interrupting

What it is and why it's on your side.

Portals increasingly send a one-time code to your phone or email when you log in, on top of your password. It feels like a nuisance, but it's there to keep anyone else out of the health record. The key point for proxy helpers: the code goes to whoever's account you're logging into.

This is one more reason proper proxy access beats password-sharing. When you log in as yourself, the code comes to your phone. If you were logging in as your parent, the code would go to their phone — and you'd be stuck at the screen while it buzzed in another room.

GOOD TO KNOW

If the codes become a real hurdle for your parent's own logins, the office can sometimes adjust how often they're asked for. Ask the portal support desk rather than turning security off entirely.

THE PHONE

21. Using the Portal App on a Phone

Most of this fits in your pocket.

You don't need a computer for any of this. The portal app on a phone or tablet does everything the website does, and the switcher between your chart and your parent's is right at the top of the screen once access is set up.

- Download your health system's official app from the app store — check the maker's name matches the health system.
- Sign in with your own account, the same one your parent invited.
- Tap the photo or initials at the top to switch to your parent's chart.
- Turn on notifications if you want an alert when a new result or message arrives.

WATCH OUT

Only download the app from the official app store, and check it's published by your parent's actual health system. There are copycat apps; the real one is linked right from the system's own website if you're unsure.

NOTIFICATIONS

22. Getting Alerts Without the Noise

Know when it matters, not every minute.

One of the nicest parts of having access is that you can be told when something new lands — a result posts, the office sends a message, an appointment gets scheduled. You set this up in the notification settings so you're not checking the app all day.

- Choose whether alerts come by text, email, or a push to the app.
- You can often pick which kinds of things alert you — results, messages, appointment reminders.
- If you get alerts for both your own chart and your parent's, label or separate them so you know which is which.

TIP

Set alerts for new messages and appointment reminders, but consider leaving results as something you check together. A flagged lab value popping up as a phone buzz can worry a family needlessly before anyone's explained it.

CHANGING IT

23. Changing or Ending Access

It's never locked in — on either side.

Proxy access isn't a one-way door. Your parent can widen it, narrow it, or turn it off entirely from the same sharing page where they set it up. And you can step back from it too if your circumstances change.

- Your parent can revoke your access any time, no explanation owed and no hard feelings required.
- They can change you from full to view-only, or the reverse, from the sharing settings.
- If access was granted through the records office, that office handles changing or ending it.

GOOD TO KNOW

The fact that it can be undone is a feature, not a worry. It means your parent never loses control of their own record, which is what makes it safe for them to share in the first place.

KIDS GROW UP

24. Why Teen Access Works Differently

A note in case you're helping a younger family member too.

This guide is about adults helping adults, but it's worth knowing the rules shift for minors. A parent generally has full proxy access to a young child's chart, and then — by law in many places — that access narrows as the child becomes a teenager and certain parts of their record turn private.

So if you suddenly find you can see less of a teenage grandchild's chart than you used to, it's not a glitch. The system is following rules about a teen's right to some privacy. Full access often returns, in a new form, when they turn eighteen and can invite you themselves.

GOOD TO KNOW

The exact ages and rules vary by state and by health system. If a teen's access matters to your family, the records desk can tell you how their system handles it.

TROUBLE

25. If the Invitation Never Arrives

A calm checklist before you start over.

Now and then the invite your parent sent just doesn't show up in your inbox. Nine times out of ten it's something small — a typo in the email address, or the message quietly landing in a spam folder.

- 1 Check your spam or junk folder; invites often hide there.
- 2 Have your parent double-check they typed your email address correctly.
- 3 Make sure they finished sending it — some systems have a confirm step after you enter the email.
- 4 If it's truly gone, have them cancel the old invite and send a fresh one.
- 5 Still nothing? Call portal support — or give me a ring and we'll sort it together.

GOOD TO KNOW

Invitations sometimes expire after a set number of days. If a week or two has passed, the fix may simply be a new invite rather than hunting for the old one.

TROUBLE

26. If You Can't See What You Expect

Access granted, but the chart looks thin.

Sometimes access works but you can see less than you thought — no messaging button, or results missing. Before you assume something's broken, it's usually one of a few ordinary reasons.

- You may have view-only access rather than full; ask your parent to widen it if you both want that.
- Certain sensitive results can be withheld from proxies by the system's rules.
- Make sure you've actually switched to your parent's chart and aren't looking at your own.
- Brand-new results can take a little time to post after a test.

TIP

If you've checked all of that and it still doesn't add up, the portal support desk can look at the access settings on their end and tell you exactly what you've been granted. That beats guessing.

SCAMS

27. Staying Safe From Fakes

The bad guys know families share these logins.

Because so many people manage a loved one's health online, scammers send fake "portal" emails and texts hoping you'll type a password into a lookalike page. A little caution keeps your parent's record — and yours — safe.

- A real invite or alert points to the same web address you use to log in normally; check it before typing anything.
- The portal will never ask for your Social Security number or a payment by gift card.
- When in doubt, don't click the link — open the app or type the portal address yourself.
- Nobody legitimate calls you out of the blue demanding your login to "fix" the account.

WATCH OUT

If an email or text about the portal creates a sense of panic or urgency — "act now or lose access" — slow down. That pressure is the oldest trick there is. Verify through the real app or a phone call before you do anything.

QUESTIONS

28. Common Worries, Answered

The things families actually ask me.

"Will my parent know what I look at?" They can see who has access and can remove it any time; some systems log activity. It's their record, and the controls stay with them.

"Can I message the doctor as them?" With full access, you can send messages, and they're usually marked as coming from you on their behalf — not disguised as your parent.

"Does this cost anything?" Making accounts and setting up proxy access is free. It's a feature of the portal, not a paid add-on.

"What if we're at different hospitals?" Each health system has its own portal and its own setup. You'll do this once for each system your parent uses.

A DAY

29. A Day in the Life of a Portal Helper

What this really adds up to, day to day.

Strip away the setup and here's what it looks like once it's working. Over coffee, your phone shows an alert that Dad's cardiology appointment got scheduled. You tap in, see the date, and add it to the calendar so you can drive him. No phone tag with the office, no relying on him to remember a card.

Later, a message from the nurse lands with instructions before the next visit. You read it, help him gather his pill bottles, and reply with a question you'd both forgotten to ask. The whole exchange takes two minutes, and he never had to find a password or squint at a screen.

GOOD TO KNOW

The goal isn't to take over your parent's care. It's to lift the fiddly parts off their plate — the logins, the scheduling, the small print — so the two of you can spend the energy on what matters.

MYTHS

30. A Few Myths, Cleared Up

What proxy access is — and isn't.

"I have to use their password." No. The whole point is your own login, so you never touch theirs.

"Being next of kin means I already have access." It doesn't. The portal still needs an invite or a legal document — family relationship alone isn't the key.

"Setting this up signs away their privacy." The opposite. They choose what you see and can change or end it any time.

"It's too technical for us." It's a handful of taps, and if it feels like one too many, that's precisely the kind of thing I come out and set up with families.

FOR THE HELPER

31. A Note for the Family Helper

If you're the one making all this work.

If you're the adult child or spouse carrying this, a few habits make it smoother and kinder. The record belongs to your loved one, so lead with their wishes — but you can be the steady hand that keeps the logins straight and the appointments on the calendar.

- Keep your own login details somewhere safe so you're never locked out at a bad moment.
- Set up access before a crisis, not during one — it's far easier when everyone's calm.
- If you help from a distance, the portal is your lifeline; lean on the notifications so you're not calling constantly to check.

GOOD TO KNOW

There's a companion guide in this series on keeping one tidy login list for all your portals. If juggling passwords is the part that wears you down, ask me for it.

SAFETY

32. When to Put the Portal Down and Call

The portal is a helper, not an emergency line.

This matters, so I'll say it plainly. A patient portal is for the steady, non-urgent parts of care — results, messages, appointments. It is not a way to reach anyone fast. Messages can take a day or more to be read.

WATCH OUT

If your parent has chest pain, trouble breathing, signs of a stroke, or just seems very wrong, call 911 — do not send a portal message and wait. For anything urgent but not an emergency, call the doctor's office directly. The portal is for the slow lane, never the fast one.

GETTING READY

33. Getting Ready to Set It Up Together

A short list so the afternoon goes smoothly.

If you're going to sit down with your parent and get this working, a few minutes of gathering beforehand saves a lot of fumbling. Here's what to have within reach.

- Your parent's portal login — make sure they can actually get into their own account first.
- An email address for you, and a password you'll use for your account.
- Both phones nearby, in case a security code needs to be entered.
- Your parent's date of birth, since the system may ask you to confirm it.

TIP

Pick a calm, unhurried time, not the morning of an appointment. This goes best as a relaxed project over coffee, and if you'd rather have a patient person there to guide it, that's exactly what I do.

YOU'RE NOT ALONE

34. You Don't Have to Do This Alone

A friendly, patient person is one call away.

I hope this guide made helping with a parent's patient portal feel a little less daunting and a lot more doable. Keep it in a drawer with your other home papers, come back to a page whenever you need it, and don't worry about memorizing anything. Nobody expects you to.

When you'd rather have a hand, that's exactly what I do. I come to your home, work at your pace, and never make you feel rushed or silly for asking. A first visit is a flat ninety-nine dollars, and for the parts that don't need me on-site I can often help right on your screen for less. Every visit comes with a 30-day, come-back-free guarantee.

I'm a patient tech helper — not a doctor, nurse, or your insurance company — so I stick to the technology: the apps, the logins, the cameras, the gadgets and getting them talking to each other. Anything about your health, your medicines, or what a number means, I'll always point you back to your doctor or nurse.

GOOD TO KNOW

When you call, I answer — or Sophie, my friendly AI helper, takes a message so nothing gets lost. Sophie isn't a runaround; she's just making sure I call you back.

TIP

Call or text me at (330) 200-8042, or visit BillsHomeTech.com. Serving Atwater and all of Portage County, with 30+ years of patient, plain-English tech help. If you're ever not 100% happy with a visit, I'll make it right or refund it. That's a promise. — Bill

CHEAT SHEET

Everyday Cheat Sheet

Keep this by the computer or your phone.

- Easiest path: your parent invites you by email from their portal's sharing area; you accept inside your OWN account.
- You each need your own login — never share a password.
- Access can be full or view-only; it's your parent's choice, and they can change or end it any time.
- Can't find the sharing menu? Look for "Share" or "Family," or check that system's MyChart help page.

- Parent can't consent? Legal authority route — a form plus photo ID and power of attorney at the medical-records (HIM) desk, a few days.
- A flagged result you don't understand is a question for the doctor or nurse, not a reason to panic.
- Real portal links match your normal login address. Panicky "act now" emails are scams — don't click.
- Emergency? Call 911. The portal is the slow lane, never the fast one.

AT A GLANCE

A Picture to Follow Along

The Patient-Invited Path

The quickest way in when your loved one can still tap a few buttons.

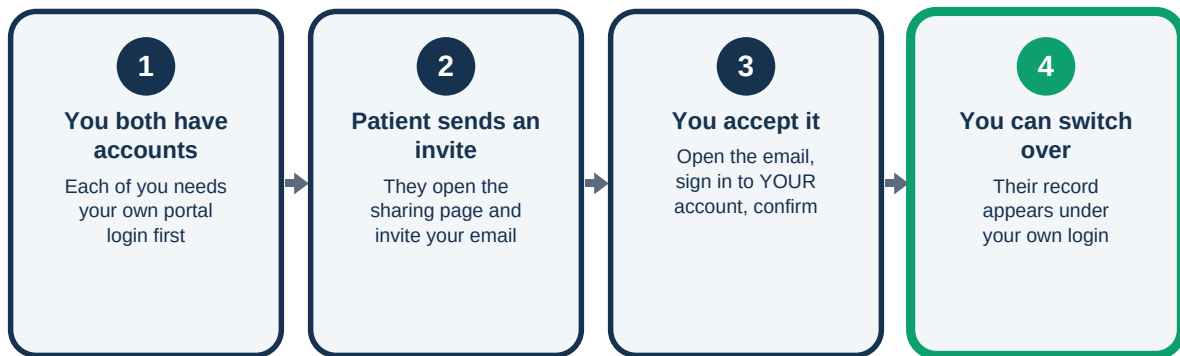


Illustration - a schematic, not to scale. Your setup may differ.

AT A GLANCE

A Second Look

Three Ways In, Side by Side

Your situation decides the door — not all three are available to everyone.

	How it starts	Best when
Patient invite	They invite you by email	They can still consent
View-only share	A lighter invite they send	They want you to see, not act
Legal authority	A form + ID at records office	They can no longer consent

Illustration - a schematic, not to scale. Your setup may differ.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: **billshometech.com/book** · **bill@billshometech.com**

This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.