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BILL'S COMPLETE MANUALS

Patient Portals & Telehealth

Your health care online — MyChart, test results, messages, and video doctor visits, in plain English

A plain-English guide to managing your care online

Take your time — you can't break it

Written for you by Bill — Bill's Home Tech

(330) 200-8042 · BillsHomeTech.com

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What's Inside

This is your guide to patient portals and telehealth. Read it in any order and at your own pace — there is no test, and you can't fall behind. We use MyChart as the main example because it's the most common, but nearly everything applies to other portals too. Every feature comes with what it actually does *for you* and slow, step-by-step directions anyone can follow. If a screen looks a little different on your device, the idea is still the same.

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PART 1

What a Patient Portal Is — and Why It Helps

Before we sign in to anything, let's understand the thing itself: a private online window into your own health care. Start here and the rest is easy.

CHAPTER 1

A Note from Bill

Hello, and welcome. If you're holding this book, you've probably been handed a slip of paper at the doctor's office that said something like "sign up for the patient portal" or "join your video visit on MyChart" — and you weren't entirely sure what that meant or where to begin. That's exactly what this book is for, and I'm glad you're here.

I'm Bill. Helping folks feel at home with their technology is what I do every day, right here in Portage County, and I wrote this the way I'd sit down beside you at your kitchen table: patiently, in plain English, no rushing and no fancy words. If I ever use a term you don't know, I'll stop and explain it right then — you won't have to look anything up.

Why this is worth learning

A patient portal — MyChart is the most common one — is a private, secure website and app that connects you to your own doctor's office. Once you're set up, you can see your test results the moment they're ready, send a question to your doctor's team without sitting on hold, refill a prescription, check your next appointment, and even see the doctor by video from your armchair. It puts a surprising amount of control back in your hands.

WHAT THIS DOES FOR YOU

What this does for you

No more waiting days for a nurse to call back with results. No more forgetting what the doctor said the moment you leave the office — it's written down for you. No more driving across town for a five-minute check-in that could happen by video. The portal turns your health care from something that happens *to* you into something you can actually keep up with.

You truly cannot break anything

Here's my big promise, and I mean it: **you cannot break anything by looking around your patient portal.** Reading your results, tapping through the menus, opening and closing things — none of it changes your medical record or sends anything to anyone. The only time something actually happens is when you clearly send a message or confirm an appointment, and even then it asks you first. So relax and explore.

A gentle word before we start

Your health information is personal, and a portal is built to keep it private and secure. But — and this is important enough that we give it a whole chapter near the end — there are scammers who send fake "portal" messages to trick people. I'll teach you the few simple habits that keep you completely safe, so you can use your portal with total peace of mind. For now, just know: we'll cover it, and it's easy.

FROM BILL

I'm only a phone call away

This book will carry you a long way on your own. But if you ever get stuck — or a "portal" message makes you uneasy — you are never stuck alone. Call me at **(330) 200-8042** and we'll sort it out together, with no judgment and no rushing. There's no such thing as a silly question here.

— Bill

CHAPTER 2

What a Portal Is, in Plain English

Let's demystify the whole thing, because the idea is simpler than the name makes it sound.

A private window into your own care

Think of a **patient portal** as a secure website — and a matching app for your phone or tablet — that belongs to your doctor's office. When you log in with your own private password, you see *your* health information and nobody else's: your test results, your medication list, your appointments, your bills, and a way to message your care team. It's like online banking, but for your health instead of your money.

"MyChart" and the other names you'll hear

The most common patient portal in the country is called **MyChart**. It's made by a company named Epic, and a great many hospitals and clinics use it — which is handy, because if two of your doctors both use MyChart, you can often see them together in one place. You may also run into other portal names depending on your provider:

- **MyChart** — by far the most common; used by many large health systems.
- **FollowMyHealth**, **athenahealth / athenaPatient**, **MyHealthONE**, and others — these do the same basic jobs with a slightly different look.
- Some clinics have their own portal with the practice's own name on it.

GOOD TO KNOW

The skills carry over

Don't worry about the different names. They all do the same handful of things — results, messages, refills, appointments, video visits — and once you've learned one, the rest feel familiar. This book uses MyChart as the main example because it's the most common, but nearly everything applies to the others too.

One portal or several?

If all your doctors are part of the same health system, you'll likely have just one portal for everything. If you see doctors at different, unrelated places, you might have a separate login for each — a little like having accounts at two different banks. We'll cover a nice trick in MyChart for linking several together so you don't have to juggle them.

CHAPTER 3

What You Need to Get Started

Good news: you almost certainly already have everything. Here's the short list.

A device

A **smartphone** or **tablet** (iPhone, iPad, or Android) is the easiest, because the portal app is tidy and touch-friendly. A **computer** (laptop or desktop) works beautifully too — you just use the portal's website in your web browser instead of an app. Use whichever you're most comfortable with; many folks use both.

An internet connection

At home, that's your **Wi-Fi** (your wireless internet). If you can check email or browse the web, you have plenty for the portal. A video visit uses a bit more internet, so for those it's best to be on Wi-Fi with a good signal.

An email address or a cell phone number

Signing up asks for an **email address** (and often a mobile number), because that's how the portal sends you a code to confirm it's really you, and how it notifies you when results arrive. If you have an email account you can get into, you're ready. If you're not sure, that's a perfect thing to set up together with a family member or with me.

A little information to prove who you are

To make sure your private records only go to you, the sign-up asks you to prove your identity — usually with your name, date of birth, and either a special **activation code** from your doctor's office or a few questions only you would know. We'll walk through both ways in the next part, slowly.

> **TIP**
>
> **Have a recent statement or after-visit paper handy**
>
> The quickest sign-ups use an **activation code** printed on a recent appointment summary, billing statement, or a letter from your doctor's office. If you have one of those nearby when you sign up, it makes the whole thing faster. No code? No problem — there's another way, and we'll cover it.

PART 2

Getting Into Your Portal

Signing up, logging in, and setting a password you can actually live with. We'll do each step slowly — this is the part people fear, and it's gentler than you'd think.

CHAPTER 4

Getting the App (or Finding the Website)

You can use your portal two ways: through an **app** on a phone or tablet, or through a **website** on any device. The app is smoothest on a phone; the website is lovely on a computer. Let's get you set up with whichever suits you.

Installing the MyChart app (phone or tablet)

On an iPhone or iPad

1. Open the **App Store** (blue icon with a white letter made of drawing tools).
2. Tap the **Search** magnifying glass at the bottom and type **MyChart**.
3. Find the one called **MyChart** by **Epic** (it has a green heart-and-folder icon). Tap **Get**, then confirm with your passcode, Face ID, or Touch ID.

On an Android phone or tablet

1. Open the **Play Store** (a colorful triangle icon).
2. Type **MyChart** in the search bar.
3. Find **MyChart** by Epic and tap **Install**.

HEADS UP

Get the real one, by Epic

App stores sometimes list look-alike apps. The genuine MyChart is made by **Epic** (sometimes shown as "Epic Systems") — check the maker's name under the title before installing. If your doctor uses a different portal (FollowMyHealth, athenaPatient, and so on), search for that exact name instead. Unsure? Give me a call and we'll make certain you've got the right one.

Pick your health system inside the app

The first time you open MyChart, it asks you to choose your **health care organization** — your hospital or clinic. Type the name of your doctor's office or hospital and tap it from the list. This tells the app which doctor you're connecting to. If you see several doctors at the same system, one choice covers them all.

Using the website instead

Prefer a computer? Your doctor's office has a portal web address, usually printed on their paperwork or found on their website under "Patient Portal" or "MyChart." Type that address

into your web browser (Chrome, Safari, or Edge) and you'll reach the same sign-in page. **Tip:** once there, save it as a bookmark/favorite so you can return with one click — and so you never have to hunt for the real address, which also keeps you safe from fakes.

CHAPTER 5

Signing Up for the First Time

This is the one-time step that creates your account. There are two paths depending on whether your office gave you an activation code. Both are straightforward — take them one line at a time.

The screen you're looking for

On the sign-in page (in the app or website), look for a button that says **Sign Up Now**, **Create Account**, or **New User**. Tap it. That starts the sign-up, as opposed to logging in to an account you already have.

Path A: you have an activation code

An **activation code** is a short string of letters and numbers printed on a recent after-visit summary, a billing statement, or a signup letter. If you have one:

1. On the sign-up screen, type the **activation code** exactly as printed (it usually doesn't need the dashes).
2. Enter the bits it asks to confirm your identity — often your **date of birth** and **ZIP code**.
3. Tap **Next** or **Continue**, then move on to creating your username and password (next chapter).

Path B: no code — verify your identity instead

No code? Most portals let you sign up anyway by proving who you are. Look for **Sign Up Online** or **No activation code?** Then:

1. Type your **personal details** — name, date of birth, address, and often the last four digits of your Social Security number, used only to match you to your record.
2. The portal may ask a few **identity questions** drawn from public records (past addresses, that sort of thing) to confirm it's really you. Answer as best you can.
3. Once verified, continue to create your username and password.

GOOD TO KNOW

Why all the identity checks?

It can feel like a lot of hoops, but there's a good reason: the portal is making absolutely sure your private medical records only ever go to **you**. That same carefulness is what keeps a stranger from ever seeing your information. A few extra questions now buys you real peace of mind.

TIP

If sign-up won't verify you, just call the office

Sometimes the automatic checks can't match you — an old address, a hyphenated name, anything. Don't wrestle with it. Call your doctor's office and ask them to help you sign up or send a fresh activation code. They do this every day and are glad to help.

CHAPTER 6

Your Username, Password, and Signing In Safely

This chapter sets up the key to your account. A little care here makes everything afterward smooth and secure — and I'll show you how to never be locked out.

Choosing a username and password

- Your **username** is the name you'll type to log in. Pick something you'll remember; it can often be your email or a simple name you choose.
- Your **password** is your secret key. Make it something only you would know — a few words strung together with a number is both strong and memorable, like *GardenCoffee7*. Avoid your name or birthday.
- You'll also set **security questions** (your first car, a childhood street). These let you back into your account if you forget your password, so answer honestly and remember what you put.

TIP

Write it down — somewhere safe at home

There is no shame whatsoever in writing your username and password on a card and keeping it in a safe drawer at home. A password you can't remember is worse than one written on paper in your own kitchen. Just keep that card private, the way you would a spare house key.

The extra code at login (two-step verification)

For safety, many portals use **two-step verification**: after your password, they text or email you a short **code** that you type in to finish logging in. It's an extra lock on the door. When you see "we've sent a code to your phone," simply open your texts, read the number, and type it in. The code is only good for a few minutes and only for you.

SCAM ALERT

Never share a login code with a person

A verification code is for **you to type into the portal** — never to read aloud to someone who calls or texts you. No real doctor's office or portal will ever phone you and ask you to tell them the code. Anyone who does is a scammer trying to get into your account. Hang up.

Staying signed in, and fingerprint/face login

On your own private phone, the app can remember you so you don't retype everything each time — and can let you log in with your **fingerprint or face**, which is both quick and secure. When the app offers to turn on Face ID, Touch ID, or a fingerprint, it's safe to say yes *on your personal device*. On a shared or public computer, always log out fully when you're done.

Forgot your password? It's fine

If you ever can't log in, tap **Forgot Username?** or **Forgot Password?** on the sign-in screen. The portal walks you through resetting it using your email, a texted code, or your security questions. Being locked out is a five-minute fix, not a disaster — and never a reason to click a link in a surprise email claiming to reset it for you.

PART 3

Finding Your Way Around

A calm tour of the main screen and the things you'll reach for most: your test results, your visit summaries, and your medication list. Nothing here can be broken by looking.

CHAPTER 7

The Main Screen

Once you're logged in, you land on the **home screen** — your starting point. It can look busy at first, but you only ever use a few things, and they're all clearly labeled. Let's find them.

The handful of buttons that matter

Portals arrange things a little differently, but you'll almost always find these main areas, shown as tiles or icons with plain names:

Area	What you'll do there
Messages	Where you read notes from your care team and send them a question.
Test Results	Your lab and imaging results, newest at the top.
Visits / Appointments	Upcoming and past appointments; where you schedule, cancel, or join a video visit.
Medications	Your current medication list and where you request refills.
Billing	Your statements and where you can pay online.
Menu	A button (often three lines ■ or the word "Menu") that opens the full list of everything else.

TIP

When in doubt, tap the Menu

If you can't spot what you're looking for on the home screen, tap **Menu** (often three stacked lines, ■). It opens a full, searchable list of everything your portal can do. You can even type a word like "refill" or "results" to jump straight there.

Getting back home

Wherever you wander, there's always a way back: a **Home** button, or the portal's name/logo at the top, takes you to the main screen. On a phone, the little **back arrow** (usually top-left) steps you back one screen at a time. You can never get truly lost — home is always one tap away.

If more than one person shows up

If you help care for a family member and have been granted access to their record (we cover this later), you'll see a way to **switch between people** — usually their names or photos near the top. Make sure you're looking at the right person before you read results or send a

message. It's clearly marked once you know to look.

CHAPTER 8

Reading Your Test Results

For most people this is the portal's single best feature: seeing your lab work and results the moment they're posted, instead of waiting days for a phone call. Here's how to read them calmly and well.

Finding your results

1. From the home screen, tap **Test Results** (or Menu > Test Results).
2. You'll see a list, newest at the top. Tap any result to open the full details.
3. Inside, you'll see each measurement, your number, and the normal range beside it — often with anything outside the usual range flagged.

A gentle word about reading results yourself

Modern portals often post results **as soon as the lab finishes** — sometimes before your doctor has had a chance to look them over. That's wonderful for speed, but it means you might see a number flagged as high or low before anyone has explained what it means for *you*.

GOOD TO KNOW

A flag doesn't always mean trouble

A value marked "high" or "low" is simply outside the average range — it is not, by itself, a diagnosis. Plenty of flagged numbers are harmless or already known to your doctor. Many offices ask you to allow a few business days for your provider to review results and reach out. If a result worries you, that's exactly what the Messages feature is for — ask your care team.

FROM BILL

Don't let a number spoil your evening

I've sat with many folks who saw a flagged result late at night and lost sleep over it, only to learn the next day it was nothing to fret about. By all means read your results — that's your right — but let your doctor be the one to tell you what they mean. When in doubt, send a message and wait for the real answer rather than guessing on the internet.

Imaging and other reports

Results from X-rays, scans, and other studies show up here too, usually as a written report from the radiologist. These can be full of medical terms. Skim them if you like, but they're really written for your doctor — your visit or a portal message is where you'll get the plain-English version.

CHAPTER 9

Visit Summaries and Your Health Record

The portal quietly keeps a tidy record of your care, so you never again have to rely on memory for what the doctor said or which medicine you're on. Let's find the useful bits.

After-visit summaries

After an appointment, your office usually posts an **after-visit summary** — a written recap of what was discussed, any instructions, and next steps. Find it under **Visits** or **Appointments**, tap the visit, and look for the summary. It's a godsend when you get home and think, "now what did she say about that pill?"

Your medication list

Under **Medications**, the portal lists what you're prescribed, the dose, and how to take it. It's a handy thing to pull up at a pharmacy, a specialist's office, or any time someone asks "what medications are you taking?" If anything looks out of date, don't edit it yourself — send your care team a message so they can correct the official record.

Health summary, allergies, and history

Most portals have a **Health Summary** area gathering your allergies, conditions, immunizations, and sometimes your vitals over time. It's a convenient one-stop view of your health, useful to glance at before a new-doctor visit. Browse it freely — reading never changes anything.

WHAT THIS DOES FOR YOU

A record that travels with you

When you switch doctors, see a specialist, or land in urgent care, having your medications, allergies, and recent results right there on your phone can genuinely help the people treating you — and spares you trying to remember it all under stress. That's your portal quietly working for you.

Downloading or printing your records

If you'd like a paper copy — for a new specialist, a family member, or your own files — most portals let you **download** or **print** a summary. Look for a **download** or **share** option within a visit or the health summary. On a computer this is easiest; on a phone you can usually save it or email it to yourself. If it gets fiddly, that's a fine thing to call me about.

PART 4

Talking to Your Care Team

Messaging your doctor's office, refilling prescriptions, and handling appointments — the day-to-day jobs the portal makes so much easier than the telephone.

CHAPTER 10

Sending a Message to Your Doctor's Office

One of the portal's kindest features: you can type a question to your care team any time of day, from your chair, and get a written answer back — no phone tree, no hold music. Here's how to do it well.

Sending a message

1. From the home screen, tap **Messages** (or Menu > Messages).
2. Tap **Send a message**, **Ask a question**, or the pencil/compose button.
3. Choose the type if asked — a **medical question** for your care team, or **non-medical** for things like scheduling or records.
4. Pick which doctor or office it's going to, type a short subject and your message, and tap **Send**.

Writing a good message

- Be clear and brief: what's going on, how long, and what you'd like (advice, a refill, an appointment).
- One topic per message keeps the answer clear.
- Mention if it's about a specific result or medication by name.

HEADS UP

Messages are not for emergencies

A portal message might not be read until the next business day. If you're having a medical emergency — chest pain, trouble breathing, signs of a stroke, a bad fall — **do not send a message. Call 911.** The portal is for the everyday questions that can safely wait a day, not for anything urgent.

Reading their reply

When your office replies, you usually get an email or text saying "you have a new message" (it won't contain the medical details — those stay safely inside the portal). Open the MyChart app or website, go to **Messages**, and read it there. You can reply in the same thread to keep the conversation together.

GOOD TO KNOW

A written answer you can keep

Unlike a phone call you half-remember, a portal reply stays in writing. You can re-read the nurse's instructions as many times as you like, show them to a family member, or refer back next week. That alone makes the portal worth learning.

CHAPTER 11

Refilling a Prescription

Running low on a medication? The portal often lets you request a refill in under a minute, without calling the pharmacy or the office.

Requesting a refill

1. Go to **Medications** from the home screen or Menu.
2. Find the medication and tap **Request refill** (or Refill) beside it. You can often select several at once.
3. Confirm which **pharmacy** you want it sent to — check it's the right one, especially if you've moved or switched pharmacies.
4. Tap **Submit**. The request goes to your care team, who approve it and send it to the pharmacy.

> **TIP**
> **Give it a couple of days**
> A refill request isn't instant — your doctor's office reviews it and sends it on, which can take a day or two. Request refills **before** you take your last dose, not after, so you never run short. If it's urgent, call the office directly.

When a medication can't be refilled online

Some medications — certain controlled ones, or a prescription that's run out of refills — can't be renewed through the portal and may need a visit or a direct call. If the Refill button is missing or greyed out, that's usually why. A quick portal message asking "how do I renew this?" sorts it out.

CHAPTER 12

Appointments — Scheduling, Canceling, and Checking In

The portal is a tidy place to see what's coming up and to handle the routine appointment chores yourself.

Seeing your appointments

Tap **Visits** or **Appointments** to see what's scheduled, with the date, time, place, and doctor. Tap any appointment for details — including directions, what to bring, and whether it's in person or by video.

Scheduling or canceling

- **To schedule:** look for **Schedule an appointment**. For certain visit types you can pick a time yourself; for others, the portal sends a request and the office calls to confirm.
- **To cancel:** open the appointment and tap **Cancel**. It's courteous (and sometimes required) to cancel at least a day ahead so someone else can use the slot.
- **To reschedule:** some portals let you move an appointment directly; otherwise cancel and book anew, or send a message.

eCheck-in: doing the paperwork from home

Before many visits — especially video visits — the portal offers **eCheck-in**: you confirm your details, insurance, medications, and sometimes answer a few health questions and pay a copay, all from home. Doing eCheck-in ahead of time means less waiting at the office, and for a video visit it's often **required before you can join**.

> **TIP**
> **Do eCheck-in the day before**
> When the portal says eCheck-in is available (usually a few days before your visit), take two minutes to do it then, calmly, rather than scrambling on the day. For a video visit especially, it clears the path so that when appointment time comes, the "Join" button is ready and waiting.

Reminders

Your portal can send appointment **reminders** by text or email so nothing sneaks up on you. If you're not getting them and would like to, look in the portal's **settings** or **notifications** area, or ask your office to turn them on. A gentle nudge the day before is a fine thing to have.

PART 5

Telehealth — Seeing the Doctor by Video

A visit to the doctor from your own armchair. The portal handles it start to finish, and the skill is simpler than you'd think. Here's the whole thing, calmly.

CHAPTER 13

What a Video Visit Is and When It's Right

A **telehealth** visit — also called a **video visit** or **virtual visit** — is a real appointment with your doctor or nurse, held over video instead of in person. You see and talk to each other on a screen, from wherever you are. For a great many routine needs, it's every bit as good as being in the office, and far easier.

When a video visit shines

- Follow-ups and medication check-ins that don't need hands-on examination.
- Talking through test results or a plan of care.
- Minor concerns — a rash, a cold, a question — where the doctor mainly needs to see and hear you.
- Days when driving is hard, the weather's bad, or you simply shouldn't be sitting in a waiting room.
- Mental-health and counseling visits, which work beautifully by video.

When you still need to go in

A video visit can't do everything — it can't draw blood, give a shot, take an X-ray, or examine you by touch. Your doctor will tell you when an in-person visit is needed. And again: a video visit is never for an emergency. For anything urgent, **call 911**.

WHAT THIS DOES FOR YOU

What this does for you

Telehealth turns a half-day ordeal — getting dressed, driving, parking, waiting — into a fifteen-minute chat from your favorite chair. For folks who don't drive, live far from the clinic, or tire easily, it can mean the difference between keeping up with care and letting it slide. That's a real gift.

CHAPTER 14

Getting Ready for Your Video Visit

A few minutes of preparation turns a video visit from nerve-wracking to easy. Do these ahead of time, ideally the day before, and the appointment itself will be smooth.

The day before

1. Complete **eCheck-in** in the portal if it's offered — for most video visits it's required before you can join (confirm your info, insurance, and any forms).
2. Make sure the MyChart app is installed and you can log in. If you'll use a computer, confirm you know the portal web address.
3. Check that your device's camera and microphone work — a quick test video call with a family member is a perfect rehearsal.

Right before the visit

1. Find a **quiet, private, well-lit** spot where you can talk freely. Face a window or lamp so the doctor can see you clearly.
2. **Prop your device up** at about eye level so your hands are free and the picture's steady — lean it against some books or use a small stand.
3. Connect to **Wi-Fi** for the steadiest connection.
4. Have beside you: your **list of medications**, your questions written down, something to take notes with, and a **phone within reach** in case the video drops and the office needs to call you.
5. If the doctor may need to see something — a rash, a swollen ankle, a wound — be ready to show it to the camera.

> **TIP**
>
> **A practice run takes the fear out of it**
>
> If this is your first video visit, don't let the appointment be the first time you try the technology. A short practice call with a patient family member — or with me — a day or two ahead means that when the real visit comes, you simply tap Join and talk to your doctor. That's what I'm here for: (330) 200-8042.

CHAPTER 15

Joining and Getting Through the Visit

Here's the heart of it. Joining a video visit through the portal follows the same gentle pattern almost everywhere, even though the exact button labels vary a little by health system.

Joining the visit

1. A little before your appointment time, open the **MyChart** app (or portal website) and log in. The **Join** button for a video visit usually becomes available a short while before the start — often around 15 to 30 minutes ahead.
2. Go to **Visits** or **Appointments**, tap your video visit, and tap the **Begin Visit** or **Join** button. (If you haven't done eCheck-in, it'll ask you to finish that first.)
3. Your device asks permission to use the **camera and microphone** — tap **Allow**. Without this, the doctor can't see or hear you.
4. A quick **hardware test** may check your camera, microphone, and speaker. Confirm you can see yourself and that the sound works.
5. You then wait in a **virtual waiting room** until your provider joins. Stay on that screen — don't close it or wander off — just as you'd wait in the office.

HEADS UP

Don't close the window while you wait

The most common hiccup is closing the app or browser during the waiting-room wait, which drops you out. Once you've joined, leave the screen open and simply wait. The doctor may be a few minutes late, same as in the office — that's normal. They'll appear when they're ready.

During the visit

When your provider joins, their face appears and you talk exactly as you would in person. Speak at a normal distance, let each person finish before the other replies (there's a tiny delay on video), and don't rush — it's your appointment. Use the **flip camera** button if you need to show them something, and your written questions to make sure nothing's forgotten.

If the technology misbehaves

- **Can't join / no Join button:** make sure eCheck-in is done, then refresh the app or page. It often appears closer to the appointment time.

- **They can't hear or see you:** check the microphone and camera aren't muted or off, and that you tapped Allow for permissions.
- **Frozen or dropped:** this is almost always the internet. Move closer to your Wi-Fi box, or leave and re-join. Switching to a different browser (Chrome or Safari) or your phone sometimes helps.
- **All else fails:** the office will call you by phone to finish the visit — that's why you keep a phone within reach. The visit still counts.

GOOD TO KNOW

After the visit

When you're done, there'll be a button to **end** or **leave** the visit. Afterward, your after-visit summary and any instructions or new prescriptions show up in the portal, just like an in-person visit. You can re-read everything at your leisure.

PART 6

Family, Caregivers, and Several Doctors at Once

Helping a spouse or parent with their care, letting a loved one help you, and tying several doctors' portals together so you're not juggling logins.

CHAPTER 16

Proxy Access — Helping a Loved One (or Being Helped)

Many of the folks I help aren't only managing their own care — they're keeping an eye on a spouse's or a parent's too. The portal has a proper, private way to do this called **proxy access**, and it's worth setting up.

What "proxy access" means

A **proxy** is a trusted person given permission to see and help manage someone else's portal. With it, you can check your husband's test results, message his doctor on his behalf, or keep track of your mother's appointments — all from your own account, with her blessing. It's the official, secure version of "let me help you with that."

> **GOOD TO KNOW**
>
> **The person being helped doesn't even need their own account**
>
> You can be granted proxy access to a loved one's record even if they've never set up a portal account themselves. That makes it a wonderful tool for helping a parent who finds the technology overwhelming — you handle the portal, they get the benefit.

How to set it up

Granting proxy access involves a bit of paperwork, by design, because it's sharing private medical information. Usually one of these:

- The **person being helped** grants access from within their own portal — look under **Settings** or **Sharing** for **Share My Record** or **Friends and Family access**, then invite the helper by email.
- Or you both complete a **proxy request form** at the doctor's office (often needing identification, and for an adult, the patient's written consent). The office sets it up.

Once approved, you'll switch between your own record and your loved one's using their name near the top of the screen. Always double-check whose record you're in before reading or sending anything.

What a proxy can and can't see

For privacy, proxy access is sometimes **partial**. A helper can typically see appointments, medications, and most results, but some sensitive items — certain test results or the private

messages between the patient and their doctor — may be held back. This isn't the system being difficult; it's protecting the patient's privacy, which is a good thing. If you need fuller access for genuine caregiving, the doctor's office can discuss what's possible.

TIP

Send messages from the right account

When you're helping as a proxy, send messages from **your loved one's record** (switched to their name), not your own, so the care team knows who the message is about. The portal makes it clear which record you're acting in — just glance at the name at the top.

CHAPTER 17

When Adult Children Turn 18

A quick note for grandparents and parents helping with a young person's care: portals handle the coming-of-age moment in a specific way that often surprises families.

While a child is young, a parent usually has full proxy access to their record. When that child reaches **18**, privacy law treats them as an adult, and a parent's automatic access typically **ends**. If the now-adult child wants a parent to keep helping, they can grant proxy access to the parent from their own account, the same way any adult shares their record. It's a simple re-grant, but it won't happen on its own — they have to choose it.

GOOD TO KNOW

Nothing's broken — it's privacy by design

If you suddenly can't see your young adult's record, the system isn't malfunctioning. The law simply handed them the keys to their own privacy. A short conversation and a few taps on their end restores your access if they'd like your help to continue.

CHAPTER 18

Tying Several Doctors Together

If you see doctors at different health systems, you may have more than one portal login. MyChart has a neat feature that can pull them into one place so you're not hunting for a different password every time.

Linking accounts (Happy Together)

Within MyChart, look under **Menu** for **Link My Accounts** (sometimes shown as "Happy Together"). It lets you connect records from other participating health systems so that, when you log in to one MyChart, you can see information gathered from several of your providers together. It works only among organizations that use MyChart, but that's a great many of them.

When they can't be linked

If one of your doctors uses a different portal entirely (not MyChart), it can't be folded in — you'll keep a separate login for that one. That's perfectly fine; just keep each portal's web address bookmarked and its password written safely at home. Juggling two is a small price for having everything online.

FROM BILL

Let's set this up together

Linking accounts, proxy access for a spouse, getting a parent's records where you can help — these are exactly the sort of thing that's a breeze with someone sitting beside you the first time. If you'd like a hand getting it all connected, that's a perfect reason to call: (330) 200-8042. We'll have it sorted in no time.

PART 7

Bills, Settings, and Comfort

Paying a medical bill online, adjusting your notifications, and making the whole portal easier to see and use. The housekeeping that makes the portal yours.

CHAPTER 19

Paying a Bill Online

Medical bills are nobody's favorite mail, but the portal at least makes paying them simple and keeps a tidy record of what you've paid.

Viewing and paying

1. Tap **Billing** or **Bill Pay** from the home screen or Menu.
2. You'll see your balance and any statements. Tap a statement to see the details — what the charge was for and what insurance covered.
3. Tap **Pay**, enter the amount (you can often pay in full or set up a payment plan), and your card or bank details.
4. Confirm, and keep the **confirmation** — the portal records it so you have proof of payment.

TIP

Questions about a charge? Ask before you pay

If a bill looks wrong — a charge you don't recognize, or something you thought insurance would cover — you don't have to pay it blindly. Use the portal's billing **message** or **customer service** option, or call the number on the statement, and ask them to explain it. Medical billing errors are common, and it's entirely reasonable to question one.

SCAM ALERT

Only pay through the real portal

Pay medical bills only inside your actual portal (reached through the app or your saved web address) or by calling the number on a statement you trust. Be wary of texts or emails with a "pay your medical bill" link — scammers send fakes. When in doubt, go to the portal yourself rather than following a link, and never give card details to someone who called *you*.

Insurance and paperwork

Many portals also hold your **insurance information** and let you update it, plus forms and documents you might need. If you change insurance, updating it in the portal (or telling the office) helps your bills get processed correctly. You don't have to master this area — just know it's there when you need it.

CHAPTER 20

Notifications and Settings

A few minutes in the settings makes the portal fit the way you like to be reminded — and nothing here can harm anything.

Choosing how you're notified

In the portal's **Settings** or **Account Settings** (often under your name or a gear icon), look for **Notifications** or **Communication Preferences**. There you can choose whether you're alerted by **text**, **email**, or both when results post, messages arrive, or appointments approach. Pick whatever keeps you in the loop without overwhelming you.

GOOD TO KNOW

Alerts never contain the private details

When the portal texts or emails "you have a new result," it deliberately does **not** include the actual medical information — you have to log in to see that. That's a privacy feature: even if someone glanced at your phone's lock screen, your health details stay safely behind your password.

Keeping your details current

Settings is also where you update your **email**, **phone number**, **password**, and **security questions**. If you get a new phone number or email, update it here so your login codes and reminders reach you. Changing your password now and then is a fine habit, especially if you ever suspect someone has seen it.

CHAPTER 21

Making It Easier to See and Use

If small print or fiddly buttons are the real hurdle, you have good options — and comfort matters. A portal you can read easily is one you'll actually use.

Make everything bigger

You don't have to live with tiny text. Enlarge it everywhere on your device, which makes the portal easier too:

Device	Where to make things bigger
iPhone / iPad	Settings > Display & Brightness > Text Size (drag the slider). For larger still, Settings > Accessibility > Display & Text Size.
Android	Settings > Display > Font size and Display size — slide up to enlarge.
On a computer	Hold Ctrl (or Cmd on a Mac) and press the + key to zoom the web page bigger; the – key makes it smaller.

Use the bigger screen for big days

For an important video visit or when you're reading detailed results, a **tablet or computer** with its larger screen is far more comfortable than a phone. Many folks keep the app on their phone for quick checks and use a tablet or computer when they want room to see. Use whatever suits the moment.

Have it read aloud, or ask for help

Devices can read text aloud and enlarge or brighten the screen in all sorts of ways — more than we can cover here. If any of that would help you, it's a wonderful thing to set up together. Never struggle with a dim, tiny screen out of stubbornness; a few adjustments can make the whole thing a pleasure instead of a chore.

TIP

The portal has its own larger-text options too

Some portals include their own accessibility settings — larger fonts, higher contrast — inside their settings menu. Have a look, or ask me to help you find them. Between your device's settings and the portal's, we can almost always get it comfortable for your eyes.

CHAPTER 22

Forms, Questionnaires, and Documents

Portals are quietly taking over the clipboard of forms you used to fill out in the waiting room. Doing them at home, in your own time, is far more relaxed — and often the office asks you to.

Pre-visit questionnaires

Before an appointment, your portal may ask you to answer a short **questionnaire** — how you've been feeling, your current symptoms, a screening question or two. You'll usually find it under the appointment itself or in a **To Do** or **Questionnaires** area. Answer honestly, tap through at your own pace, and submit. It helps your doctor make the most of your time together.

Updating your own information

Portals often let you review and update your **medications**, **allergies**, **pharmacy**, and **health history** yourself — a nice way to keep your record accurate. If you spot something out of date, you can usually suggest a change, which your care team confirms. You're not expected to be a medical expert; just flag anything that looks wrong.

Uploading and downloading documents

Some portals let you **upload** a document the office asked for — a photo of a form, an outside test result — and **download** your own records to keep or share. On a phone you can often take a photo right within the portal. If this gets fiddly, it's a perfectly good thing to call me about; we'll do it together.

TIP

A To Do list worth checking

Many portals gather everything awaiting your attention — forms to fill, eCheck-ins to do, messages to read — in one **To Do** area on the home screen. Glancing there now and then means nothing important slips past you before a visit.

CHAPTER 23

When the Portal and Reality Don't Match

Now and then something in the portal looks wrong — a medication you stopped months ago, a result that seems off, an appointment you don't recognize. Here's how to handle it calmly, because it's usually an easy fix and rarely a cause for alarm.

Remember: you can't break it by looking

Finding a mistake in your record doesn't mean you did anything wrong, and simply viewing it changes nothing. Records get out of date the same way any paperwork does — a medication list that wasn't updated, an old address, a visit logged under the wrong name.

The right way to fix it

- **Don't** try to edit the official medical record yourself — you generally can't, and you shouldn't.
- **Do** send a **portal message** to your care team describing exactly what looks wrong. They'll check it and correct the real record.
- For anything about a **result** that worries you, ask your team rather than guessing — that's what the Messages feature is for.
- For a billing error, use the billing message or the number on your statement.

GOOD TO KNOW

A mismatched record is common and correctable

Please don't lose sleep if your portal shows something that isn't quite right. A quick message gets it sorted, and your care team would far rather you tell them than quietly worry. You're actually helping keep your record accurate by speaking up.

CHAPTER 24

A Gentle First-Week Plan

If all of this feels like a lot, here's the truth: you only need a little of it to get real value, and you can learn the rest whenever a need arises. Here's a calm, no-pressure way to begin.

This week

1. **Get in.** Install the app (or bookmark the website) and log in once. That alone is a real accomplishment — everything else builds on it.
2. **Look around.** Tap into Test Results and read a recent one. Open your last visit summary. Nothing you tap can hurt a thing.
3. **Find the Message button** — just locate it, so you know where it is when you need it.

Next week, if you like

1. **Send one simple message** — even a non-medical question — to feel how easy it is.
2. **Check your next appointment**, and try an eCheck-in if one's offered.
3. **Set your notifications** the way you like, so the portal nudges you by text or email.

Whenever a need comes up

Refill a prescription the next time you're running low. Join a video visit when your doctor offers one. Set up proxy access when you want to help a loved one. You don't have to learn these before you need them — the chapter is here waiting, and so am I.

> **FROM BILL**
>
> **One small step at a time**
>
> Nobody masters their patient portal in an afternoon, and nobody needs to. The folks I help who do best are the ones who simply get logged in, then learn one new thing each time life calls for it. That's not falling behind — that's exactly the right pace. And I'm always a phone call away at (330) 200-8042.

PART 8

Privacy and Staying Safe

The one part worth reading twice. Your portal is built to keep your health private — and a few simple habits keep the scammers who imitate it from ever fooling you.

CHAPTER 25

Your Privacy — What's Protected

Before we talk about scammers, let's be clear about what's actually safe, because a lot is. Understanding this lets you use your portal with a calm, confident mind.

The law is on your side

Your medical information is protected by a federal privacy law (often called **HIPAA**). Your doctor's office can't share your health records with just anyone, and the portal is built to the same standard: your information sits behind your private password, travels in scrambled (encrypted) form, and is shown only to you and the people you've authorized.

Why the portal feels so cautious — and that's good

All those identity checks at sign-up, the login codes, the partial proxy access — they can feel like a lot. But every one of them exists to make sure *your* records only ever reach *you*. The carefulness you experience as a minor nuisance is the very thing keeping strangers out. It's worth the small effort.

GOOD TO KNOW

The portal itself is safe to use

Using your real portal — the genuine app or your doctor's real web address — is safe. The risk we're about to cover isn't the portal; it's crooks who *imitate* the portal to trick you. Learn to tell the real from the fake and you're protected.

CHAPTER 26

The Fake-Portal Scams Going Around

This is important enough to read carefully. Because portals like MyChart have become so popular, scammers have started imitating them — sending fake emails, texts, calls, and look-alike websites designed to steal your login or your money. These schemes have been spreading, and dozens of health systems have warned patients about them. Here are the ones to know.

SCAM ALERT

The fake "your results are ready" message

You get an email or text saying new test results are ready, with a link to "log in." The link leads to a **counterfeit** sign-in page that looks just like the real portal. If you type your username and password there, the crooks capture them. Some versions then show alarming fake results and push you to "call support" or install something. **Don't tap the link.** Open your real portal app or saved web address instead, and check for results there.

SCAM ALERT

The fake "free Medicare kit" offer

A message — sometimes dressed up to look like it's from your portal — offers a free "2026 Medicare health kit" or testing kit. It says the kit is free but asks for a small "shipping fee," then collects your **credit card** and personal details. No such kit ships. Real Medicare and real portals don't work this way. Delete it.

SCAM ALERT

The caller who wants your login code

Someone phones claiming to be from your doctor's office or "portal support," says there's a problem, and asks you to read back the **verification code** just texted to you — or to tell them your password. **Never do this.** That code and password are the keys to your account. No legitimate office will ever ask for them by phone. Hang up and, if you're worried, call your office on a number you already trust.

How the fakes try to rush you

Every one of these leans on the same trick: **urgency**. "Act now," "your account will be locked," "results need immediate attention," "this offer expires today." Real health care rarely works that way. When a message tries to make you panic and click or pay *right now*, that

pressure itself is the warning sign.

CHAPTER 27

Four Habits That Keep You Safe

You don't need to be technical to be safe — you need four simple habits. Follow these and the scams above simply can't touch you.

1. Go to the portal yourself — never through a link

This one habit defeats nearly every portal scam. Instead of tapping a link in an email or text, **open the portal the way you always do**: the app on your phone, or your own saved bookmark of the real web address. If there really are new results or a real bill, they'll be there when you log in yourself. If they're not, the message was fake.

2. Never give your password or codes to anyone

Your portal password and your login codes are for **you**, typed into the **real** portal — never read aloud, never typed into a page you reached from a link, never shared with a caller. No real office will ask.

3. Let urgency be your warning bell

When a message tries to frighten or rush you — locked account, dire result, expiring offer — slow down. That pressure is the scammer's main tool. Take a breath, and check through the real portal or a trusted phone number before doing anything.

4. When unsure, ask before you act

If a message, call, or page leaves you even slightly uneasy, pause and check with someone you trust — your doctor's office on a known number, a family member, or me. A two-minute phone call has saved many people a great deal of trouble.

If you remember nothing else…	…remember this
Real portal messages	Simply tell you to log in — they do NOT contain your actual results or ask for your password.
A real office	Will never call and ask you to read back a login code or give your password.
Links in surprise messages	Treat as suspect. Reach the portal yourself through the app or your saved address.
Urgency and secrecy	The two biggest warning signs of a scam, every time.

FROM BILL

"Is this real?" calls are exactly what I'm here for

If you ever get a portal message, a results alert, or a "support" call that makes you uneasy, stop and call me *before* you click, pay, or tell anyone anything: **(330) 200-8042**. Checking is never a bother — it's the smartest thing you can do, and there's never a charge for asking. I would far rather hear from you about a message that turns out to be nothing than help clean up after one that wasn't.

PART 9

Your Cheat-Sheet & When to Call Bill

The one-page reminders to keep by your chair, and an honest word about when a call to me is the right move. You're ready.

CHAPTER 28

The Everyday Cheat-Sheet

Keep this by the chair where you use your portal. It's the whole thing, at a glance.

The main jobs

To do this…	…do this
Log in	Open the MyChart app (or your saved portal web address) and sign in. Type the texted code if asked.
See test results	Tap Test Results. A flag just means "outside average" — not a diagnosis. Ask your team if unsure.
Message the office	Tap Messages > compose. For questions that can wait a day — never for emergencies (call 911).
Refill a prescription	Tap Medications > Request refill. Do it a few days before you run out.
Appointments	Tap Visits to see, schedule, cancel, or do eCheck-in.
Join a video visit	Do eCheck-in first. Near visit time: Visits > your visit > Begin Visit > Allow camera & mic > wait in the waiting room.
Pay a bill	Tap Billing > Pay. Question a charge before paying if it looks wrong.

Before a video visit

- Do **eCheck-in** the day before — it's often required to join.
- Quiet, well-lit spot; face a window or lamp; prop the device up at eye level.
- Be on **Wi-Fi**; keep your meds list, questions, and a **phone** nearby.
- Join a few minutes early and **don't close the window** while you wait.

The five-second fixes

- **Can't log in** → tap Forgot Password; reset with a code or your security questions.
- **No Join button** → finish eCheck-in, then refresh the app or page.
- **They can't see/hear you** → check camera and microphone aren't off; tap Allow for permissions.
- **Video frozen** → move closer to the Wi-Fi box, or leave and re-join. The office can call you to finish.

The golden safety rules

STAY SAFE

Reach the portal yourself; never share a password or code

Don't tap links in surprise "results" or "bill" messages — open the real app or your saved address instead. Never read a login code to a caller or type your password into a page you reached from a link. Urgency and secrecy are always the warning signs. When unsure, call your office on a trusted number — or call Bill.

CHAPTER 29

When to Call Bill

This book will carry you a long way, and most days you won't need anyone's help. But you are never stuck alone — that's simply not how I do things. Here's an honest word about when picking up the phone is the right move, so you never feel you're imposing.

Good reasons to call — none of them silly

- You'd like help **signing up** for your portal the first time, or you're stuck on the identity verification.
- You have a **video visit coming up** and want a calm practice run so the real day is easy.
- You want to set up **proxy access** to help a spouse or parent — or link several doctors together.
- You got a portal message, results alert, or "support" call that **felt wrong** — always call me *before* you click, pay, or share anything.
- You just want someone to **sit with you**, in plain English and no rushing, while you get the hang of it. That's the whole job, and I'm glad to do it.

How to reach me

I'm Bill, and I run **Bill's Home Tech** right here in Portage County, Ohio. I've spent 30+ years helping people feel at ease with their technology, and helping folks stay on top of their health care — without fear and without fuss — is some of the most rewarding work I do.

Phone	(330) 200-8042 — call or text. If I can't pick up, leave a message and I'll call you back.
Book a visit online	billshometech.com/book
Where I work	Portage County, Ohio, and the nearby communities.
If you visit the website	You may chat with Sophie, my friendly assistant on the site, who can help you book a time to talk.

FROM BILL

My standing offer

If anything in this book — or anything your portal does — ever puzzles you, pick up the phone. No question is too small and no problem too silly. I'll come out, or talk you through it, as plainly and patiently as it takes. Helping someone go from dreading their health care to feeling on top of it is a fine way to spend a day. That's why I do this.

— Bill · Bill's Home Tech · (330) 200-8042 · BillsHomeTech.com

A few parting words

Here's the truth to carry away from all these pages: **there is no such thing as a dumb question.** The people I help are smart, capable folks who simply weren't handed a manual that spoke plainly. Now you have one.

Don't feel you must learn it all at once. Pick one small thing this week — sign in and read your last visit summary, or send a simple message to your office. Next week, try something else. Before long, keeping up with your own health care online feels as natural as checking the mail, and a good deal less of a trip. **You're going to do just fine.**

— Bill