

The patient portal is a great utility for patients to have a secure platform to access their medical records, prescriptions, patient education and the capability to send and receive messages from your office.

Every Crystal Practice management system comes with it's own unique patient portal URL. The only thing you will need to do is generate usernames and passwords and choose which files you would like the patient to have access to.

1. Opening the portal

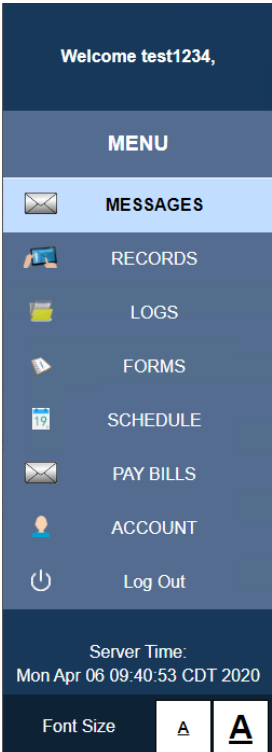
To see the URL of your practice, go to Admin->Website. Your URL is listed under System Online Documents and is specific to your practice. Clicking on the URL will bring you to the portal log in page, you must have a username and password set up in order to advance. It's a good idea to generate a username and password for your test patient so that you can become familiar with what the patient will see as well as test out some of the messaging features.

2. Generating a Username and password

a) Patient->Files->Online Portal (Add/Remove Files)

Press Default to have the system assign or enter a value into the username and password fields.

b) Records->ARRA tab->Upload Medical Record button. If a password isn't assigned, the system will prompt to add online access.



What does the patient see when they log in?

MESSAGES – secure messages between the patient and office

RECORDS – any medical records or files your office has uploaded for the patient. They can view and/or download the document(s)

LOGS – a log of when the portal has been accessed

FORMS (optional) – a direct link to the online forms

SCHEDULE (optional) – schedule an appointment if Schedule Your Exam is enabled

PAY BILLS (optional) – pay their balance if your office utilizes WorldPay

ACCOUNT – allows the patient to update their password

Log Out – log out of the portal

3. Methods to give the patient access to their portal

a) Emailing username and password

The Email Portal Access button can be found in Patient->Files, Billing when viewing a saved invoice or in Records->ARRA tab. This button allows you to email the patient the portal URL and their username and password. You must have a Gmail account and configure the settings in Admin->Email->Email Settings (Non-Direct) [NON-DIRECT EMAIL INSTRUCTIONS](#)

b) Include log-in information on the bottom of an invoice

In Billing, while viewing an invoice there is a section for View/Print Options at the bottom of the screen.

View/Print Options
☒ Column View ☒ Hide Diag
☐ Row View
☐ Custom View ☒ Portal Info

Checking the Portal Info box will include the Default Web Portal information found in Admin->Invoices. To have this box automatically checked for every invoice, check Include information on how to access the portal which is found in Admin->Invoices.

☒ Include information on how to access the portal

If the patient doesn't have a username and password generated, the system will alert you that this information will not be included on the printed invoice.

c) Write down or have the patient write down the user name and password

TIP It is very helpful to add a direct link to the patient portal URL (from step 1.) to your website. You can instruct the patient to click on the link after going to your website. (you must set up this link or have your web designer set up the link)

4. Adding files to the patient's portal

The patient will only have access to files that are added by your office. To see a list of files that the patient currently has access to, go to Patient->Files->Online Portal (Add/Remove Files)

Files are listed in the Online Files section:

Date	Filename	Description
04/08/2016	Glaucoma.pdf	Information on Glaucoma
07/23/2018	CrystalPM.pdf	OT Eval
07/23/2018	2018-07-20_...	test

Blue=Uploaded system document

Green=Upload from the patient's files section

Pink=File assigned from another patient

a) Adding an existing file from Patient->Files:

Right click on a document and select Upload File to Online Documents. This will open the Share Files Online window. The system will pre-populate the Upload File section. You can edit the Date/Description and check if the file is for education resource, then click Upload File. You can close the window after the file appears in the list.

b) Uploading a file from your desktop

Go to Patient->Files->Online Portal (Add/Remove Files) and click the Add/Remove button. From the Upload File section click the Find button and locate the file from your computer. Give the file a description, check if the file is for education resource, then click Upload File. You can close the window after the file appears in the list.

c) Uploading a system document

If you have generic files that are re-used for multiple patients, you can upload them into Crystal. A good example would be patient education handouts. PDF is the best format for these files as most patients will have a PDF

reader on their computer. Go to Admin->Website. In the System Online Documents section, click FIND and locate the file. Give the file a description that will be easy for the patient to see what the file contains and Upload File.

Go to Patient->Files->Online Portal (Add/Remove Files) and click the Add/Remove button. Click the Assign System File button, choose the document you would like to upload from the dropdown menu, check if the file is for education resource, then click Assign File. You can close the window after the file appears in the list.

The Search Online button allows you to access educational materials from the MedLinePlus website.

d) Assign File From Other Patient

Go to Patient->Files->Online Portal (Add/Remove Files) and click the Add/Remove button. Click on the Assign File From Other Patient button. Click the Find button and choose the patient. The system will only display files that are uploaded to the other patient's portal. It will not display files that are located in the Files section. Choose the document you would like to upload from the dropdown menu, check if the file is for education resource, then click Assign File. You can close the window after the file appears in the list.

e) Using the CrystalPDF Printer to upload files. Common use for this is to upload prescriptions.

[Upload Prescriptions to the portal with the Crystal PM Printer](#)

5. Removing Files

Go to Patient->Files->Online Portal (Add/Remove Files) and click the Add/Remove button. Choose the category you would like to remove the file from (pt file/sys file/other pt file). Click on a file and choose Remove File. Click Yes if you are sure you would like to remove the file. This action is non-reversible. You will need to re-upload the file if it's accidentally deleted.

6. Authorized Web Users

Date	Username	Password	Notes

This section allows you to add an authorized user (such as guardian or spouse) as an authorized user to the patient's portal.

The patient or authorized user can give you their desired username & password. A note is optional, example would include the relationship to the patient.

To remove an authorized user, double click it. A prompt will ask you to confirm.

7. Messages

The messages section on the portal allows the patient to securely contact the office and for you to securely contact them.

The patient can type their message and send it to the office.

TYPE MESSAGE HERE

Attach Files

Send

The patient can also attach a file for you which you can view in Patient->Files->Online Portal (Add/Remove Files)
Double click on the picture to open it. To save the picture into to the files section, use the PDF printer.

How to check to see if you have any messages

Go to Tasks and click Check for Web Messages

Double click on a task to open the reminder window.

a) To sign off on a task, choose your name from the sign-off dropdown menu and Update Reminder.

b) To reply to the task, double click on the patient's name in the reminder window. When you are in the patient's chart, go to the Files section, choose the online portal and choose Messages, then Send Message.

The Message Window will pop-up. Check the task you would like to reply to, and type a message to the patient.
Notes are optional.

Date	Text	Written By	Request Response	Response D	Notes
<input type="checkbox"/> 07/25/2018	Hello, I would like to request a medicatio...	Patient	REQ	07/25/2018	
<input type="checkbox"/> 07/25/2018	I wanted to thank Sarah for her help tod	Patient			
<input type="checkbox"/> 07/25/2018	We have sent a refill of xxxxx to Walgre...	Office			xxxxx was eRx to Walgreens
<input type="checkbox"/> 07/25/2018	Perfect! Thank you.	Patient			

If this message is in response to a previous message, check the message(s) above before Sending Message.

MESSAGE TO SEND TO PATIENT

Notes [office use only]

☒ Send Email to the Patient informing them of a response waiting for them

Send Message

**Checking off send email to the patient will send an email to the patient. [You must have Gmail configured in order for this to work.] Here is what they will see:

You have a secure message waiting for you at <https://www.crystalpm.com/PatientPortal.jsp?crystalpmid=2023>. Please login to view this message.

Information regarding the message window

DATE	TEXT
07/25/2018	Hello, I would like to request a medication refill.
07/25/2018	I wanted to thank Sarah for her help today!
07/25/2018	We have sent a refill of xxxxx to Walgreens. Please let ...

Send Message ☐ Documents ☐ Authorized Web Users ☒ Messages

Messages will stay in the message history window, regardless of if they were signed off on or not.

Double clicking on a message will reveal the message log.

8. Additional Information for optional integrations

Online Forms: onlineforms@crystalpm.com

Schedule Your Exam: email info@scheduleyourexam.com

WorldPay: <http://info.worldpay.com/CrystalPM>