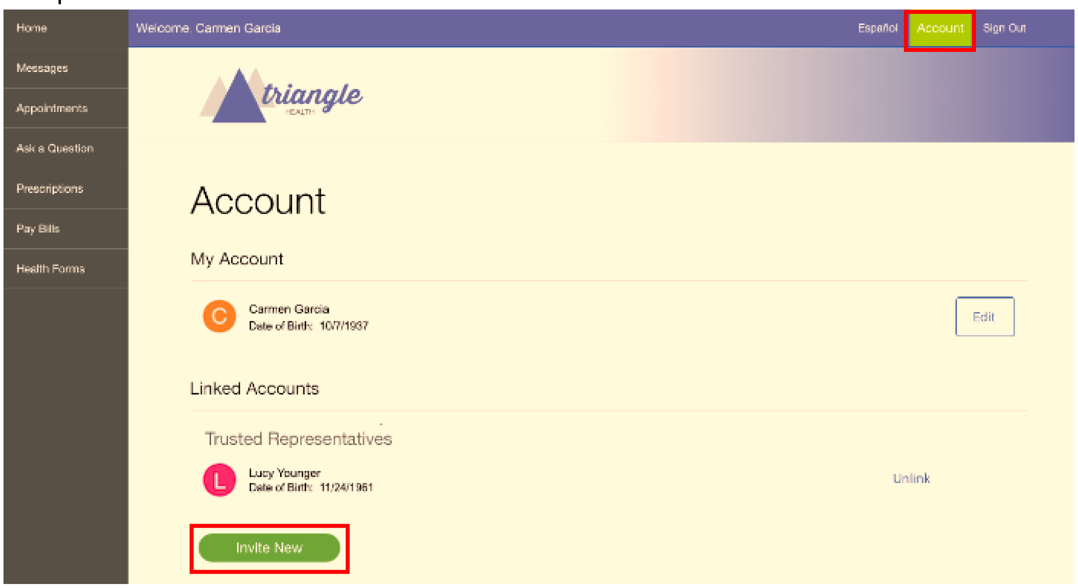
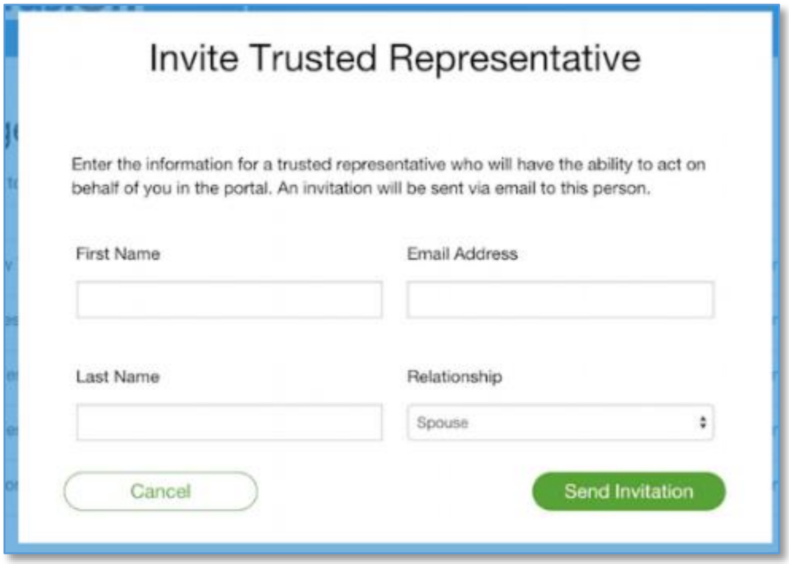
Linked Accounts – Adding Authorized Representative

Patient Invitation/Activation for Trusted Representatives

- When patient wants to invite someone else to view their information and act on behalf of them on their portal account, they will need to invite that person as a trusted representative.
- To invite a trusted representative, the patient will go to Account>Linked Accounts>Invite New in the patient portal.



- The patient will then enter the first name, last name, email address, and relationship of the trusted representative they are inviting and then click “Send Invitation.”



- The trusted representative then receives the invitation email in their inbox and can click “Sign Up!” to accept the trusted representative invitation.

medfusion

Hi TrustedRep,

Otis **********t1 has sent you this invitation to join the patient portal at Implementation Training GE Centricity so that you can view his/her health data and communicate on his/her behalf.

Implementation Training GE Centricity's secure patient portal offers convenient features that can save time. Creating an account is fast and easy!

Sign Up!

Once you've signed up for an account, you'll have 24/7 access to our convenient online services.

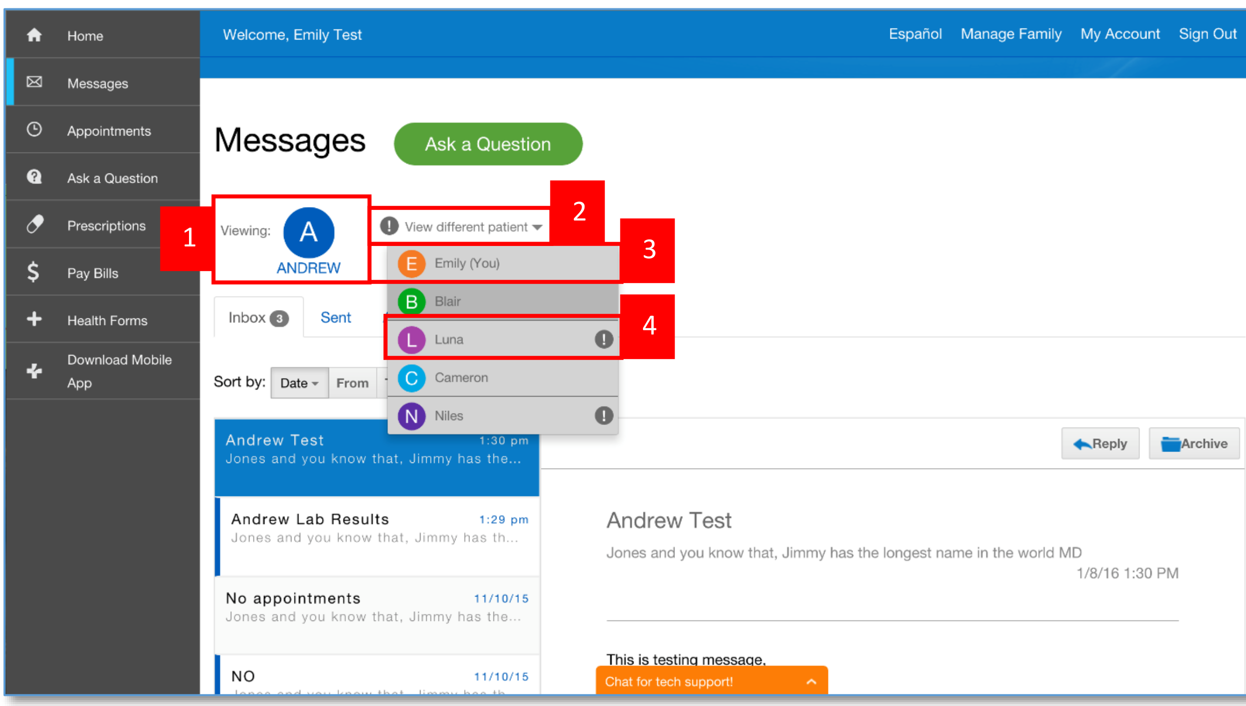
Having trouble? Copy and paste this url into your web browser:
https://www.medfusion.net/implementation-24428/portal/#/representative/activate?uuid=e1b9dbbe-1d66-4f01-ad64-d3e854f3d355&activationCode=KB1DU5K5&lang=EN

Thank you,

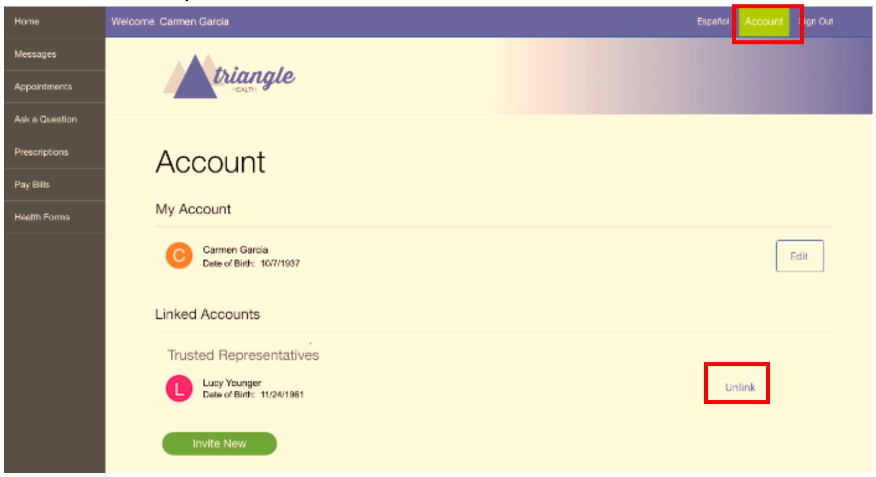
Implementation Training GE Centricity
Visit our website

Patient Portal Functionality

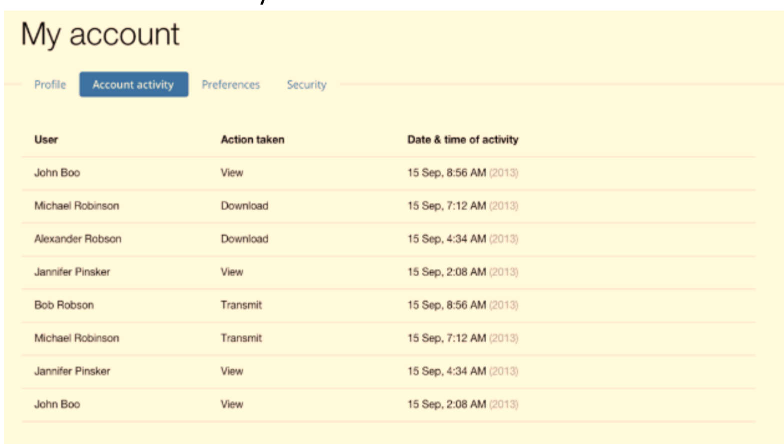
- When a user is signed in to the patient portal, there will be a visual indication at the top of every page to inform the user as to which patient is selected at that time. Any information, data, or action taken will be done on behalf of the selected patient shown at the top of the screen. In the screenshot below, the user is seeing information for Andrew and will be acting on behalf of Andrew (1 in image below).
- The user can switch to view or act on behalf of another patient by clicking on the "View Different Patient" dropdown next to the patient indicator (2 in image below).
- If the user is also a patient at this practice, his/her name will be included in the dropdown list with a (You) next to their name. If the user is not a patient (e.g. a parent or trusted representative who is not a patient at the practice), then only the linked patients names are included in the dropdown (3 in image below).
- If there is a badge next to a name in the dropdown list, it indicates that there is either unread messages, a balance due, or a health form to complete for that patient. This alerts the user that they should toggle to that patient in order to complete an outstanding task for that patient (4 in image below).



- In Account, the user can view which users are linked to their account either as dependents (under-age patients) or as trusted representatives and can unlink them.



- Health Record (CCD) views, downloads, and transmits activity can also be tracked for the patient by going to Account>Edit>Account Activity



My account

Profile | Account activity | Preferences | Security

User	Action taken	Date & time of activity
John Boo	View	15 Sep, 8:56 AM (2013)
Michael Robinson	Download	15 Sep, 7:12 AM (2013)
Alexander Robson	Download	15 Sep, 4:34 AM (2013)
Jannifer Pinsker	View	15 Sep, 2:08 AM (2013)
Bob Robson	Transmit	15 Sep, 8:56 AM (2013)
Michael Robinson	Transmit	15 Sep, 7:12 AM (2013)
Jannifer Pinsker	View	15 Sep, 4:34 AM (2013)
John Boo	View	15 Sep, 2:08 AM (2013)

- If the signed in user is not a patient, they can view and edit each dependent's profile and preferences by clicking 'Edit' by the patient of their choice. The user can also view and edit their own email, password, and username.