

USER GUIDE :
PATIENT PORTAL

MEDFAR
SOLUTIONS CLINIQUES



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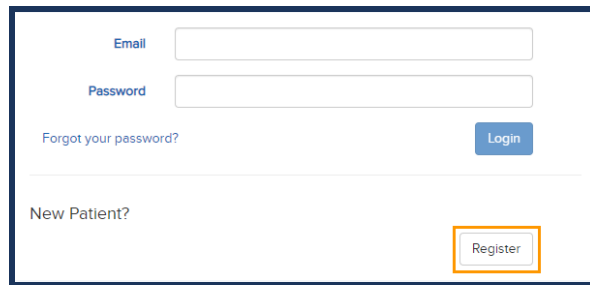
Accessing the Patient Portal

The patient portal is a tool meant to help schedule your medical appointments and provide your clinic with an effective communication channel. Ask your clinic how to access their portal as not every clinic links their patient portal to their website.

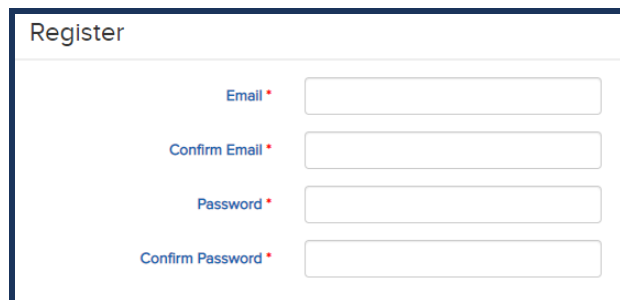
Creating an Account From the Patient Portal

To create an account in your clinic's patient portal, follow the steps below:

1. Click *Register* under the *New Patient?* section.

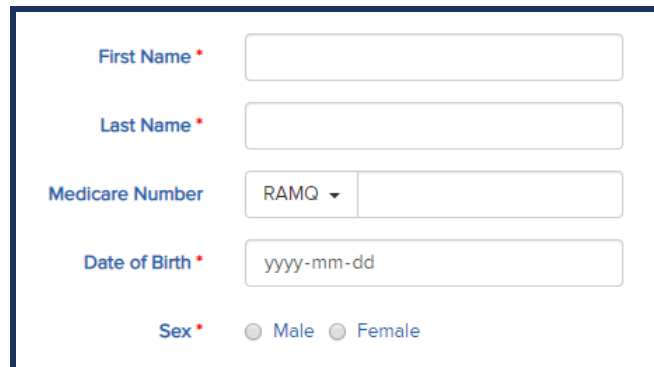
A screenshot of a web form for patient portal access. It features two input fields labeled 'Email' and 'Password'. Below the 'Email' field is a link that says 'Forgot your password?'. To the right of the 'Password' field is a blue button labeled 'Login'. Below these fields is a section titled 'New Patient?' which contains a button labeled 'Register' that is highlighted with an orange border.

2. Fill out the fields displayed on the page.
 - Fields with a red asterisk are mandatory and can vary depending on the clinic.
 - a. Enter your email address and confirm it.
 - You must have an email address to create a portal account. It is not allowed to create more than one portal account with the same email address.
 - b. Create your password and confirm it.

A screenshot of a 'Register' form. The title 'Register' is at the top left. Below it are four input fields, each with a label and a red asterisk indicating it is mandatory: 'Email', 'Confirm Email', 'Password', and 'Confirm Password'.

- The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).

- c. Fill out the personal information fields.

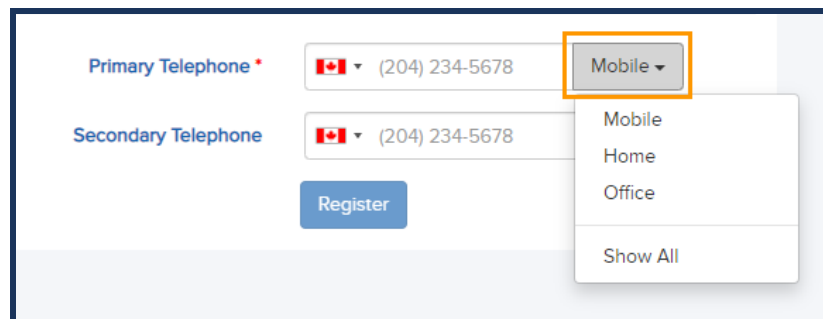


A screenshot of a personal information form. It contains the following fields: 'First Name *' with an empty text box; 'Last Name *' with an empty text box; 'Medicare Number' with a dropdown menu showing 'RAMQ' and an empty text box; 'Date of Birth *' with a text box containing the placeholder 'yyyy-mm-dd'; and 'Sex *' with two radio buttons labeled 'Male' and 'Female'.

- It is impossible to create an account for a person younger than 14 years old. To use the portal for a child, you must first create an account for the parent or tutor. You can then ask the clinic to add the child's profile to the parent's account. You will then have one account with 2 profiles.

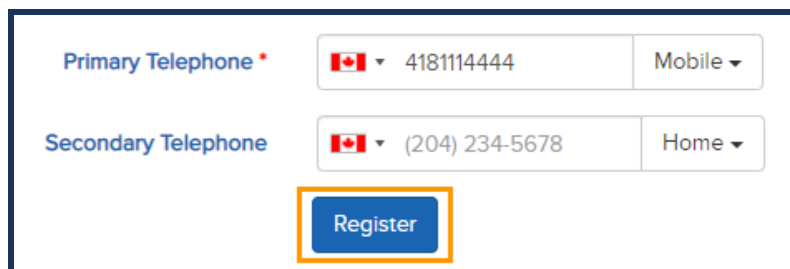
- d. Add a phone number where you are easily reachable.

- i. Click the drop-down list on the right side to specify the type of phone you are adding.



A screenshot of the telephone form. It shows 'Primary Telephone *' and 'Secondary Telephone' fields, both with a Canadian flag dropdown and the number '(204) 234-5678'. A 'Register' button is below. A dropdown menu is open on the right, showing options: 'Mobile', 'Home', 'Office', and 'Show All'. The 'Mobile' option is highlighted with an orange box.

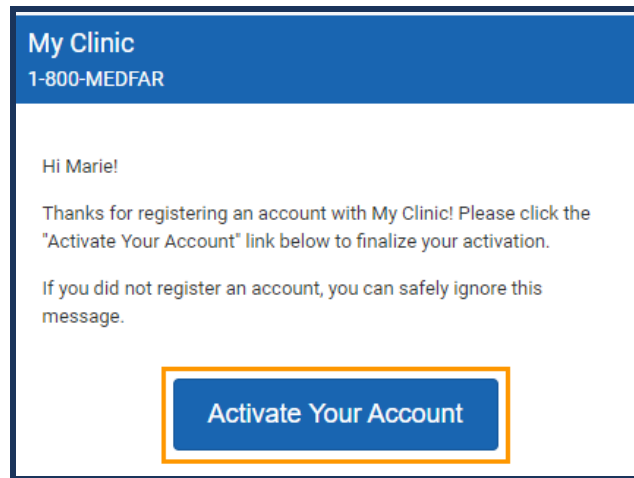
- e. Click *Register* when you have filled in all the required information.



A screenshot of the telephone form. The 'Primary Telephone *' field now contains the number '4181114444' and the dropdown is set to 'Mobile'. The 'Secondary Telephone' field remains '(204) 234-5678' with the dropdown set to 'Home'. The 'Register' button is highlighted with an orange box.

- If the option is unclickable, it means that at least one field is empty or incorrectly filled.

3. Activate your portal account by opening the message sent to the email address used to create the account. Click *Activate Your Account*.

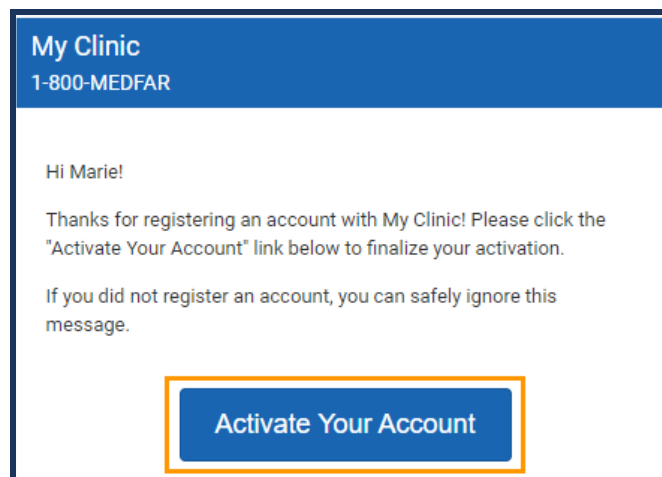


- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
4. Read the patient portal's *Terms and Conditions* and click *I have read, understood and accepted the Terms and Conditions* at the bottom of the page.

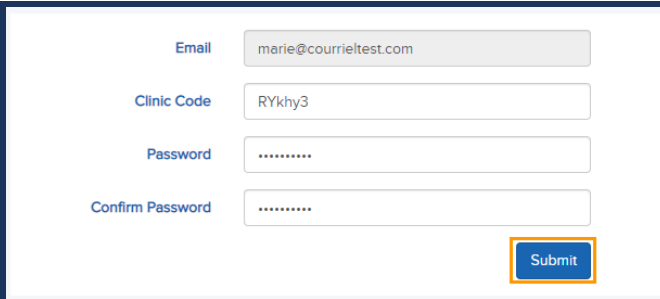
Creating an Account From the Clinic's Invitation

To create an account using the clinic's invitation, follow the steps below:

1. Connect to your email inbox, open the message received from your clinic and click *Activate your account*.



- You are redirected to the patient portal's login page.
 - The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
2. Fill out the required fields.
- a. Enter the code given to you by the clinic.
 - The code given by the clinic is valid for a 24 to 72-hour period. If you try to activate your account past this time limit, the code will have expired. You will have to contact the clinic so they can provide you with a new invitation and a new code.
 - b. Create your password and confirm it.
 - The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
 - c. Click *Submit* once all the boxes are filled out.

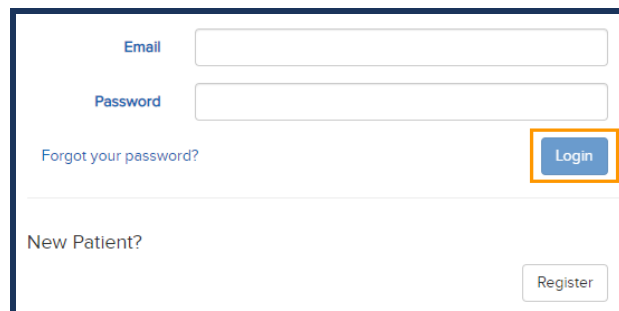
A screenshot of a web form for patient portal activation. The form is enclosed in a dark blue border. It contains four input fields with labels to their left: 'Email' with the value 'marie@courrieltest.com', 'Clinic Code' with the value 'RYkhy3', 'Password' with masked characters '.....', and 'Confirm Password' with masked characters '.....'. A blue 'Submit' button is located at the bottom right of the form, highlighted with an orange border.

3. Read the patient portal's *Terms and Conditions* and click *I have read, understood and accepted the Terms and Conditions* at the bottom of the page.

Log Into Your Portal Account

To log into your portal account, you must use the email address and password used while registering. To do so, follow the steps below:

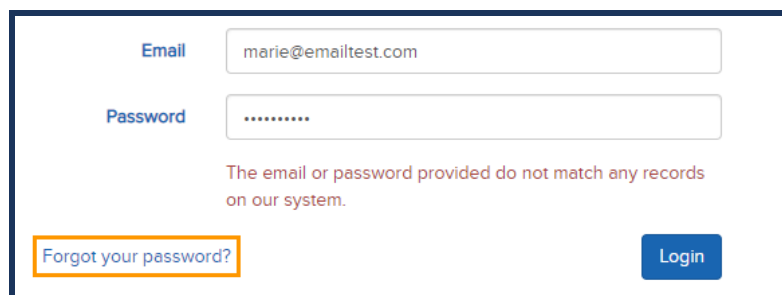
1. Enter your email address.
2. Enter your password.
3. Click *Login*.

A screenshot of the Patient Portal login form. It features two input fields: 'Email' and 'Password'. Below the 'Password' field is a link that says 'Forgot your password?'. To the right of the 'Forgot your password?' link is a blue 'Login' button, which is highlighted with an orange border. At the bottom of the form, there is a section labeled 'New Patient?' with a 'Register' button.

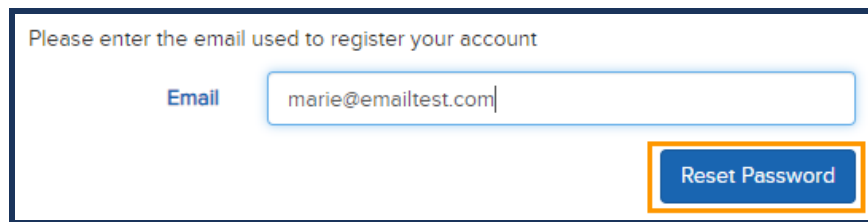
Resetting a Forgotten Password

If you get an error message when trying to log in, it is possible that the email address or password entered are incorrect. If, however, you have forgotten your password, you can reset it from the patient portal's login page. To reset your password, follow the steps below:

1. Check that the email address is correctly entered in the *Email* field.
 - If you have more than one email address, make sure you are using the one registered to your portal account.
2. Click *Forgot your password?*

A screenshot of the Patient Portal login form. The 'Email' field contains 'marie@emailtest.com' and the 'Password' field contains '.....'. Below the password field, a red error message reads: 'The email or password provided do not match any records on our system.' At the bottom left, the 'Forgot your password?' link is highlighted with an orange border. At the bottom right, there is a blue 'Login' button.

3. Enter the email address used to create your account in the designated field and click *Reset Password*.

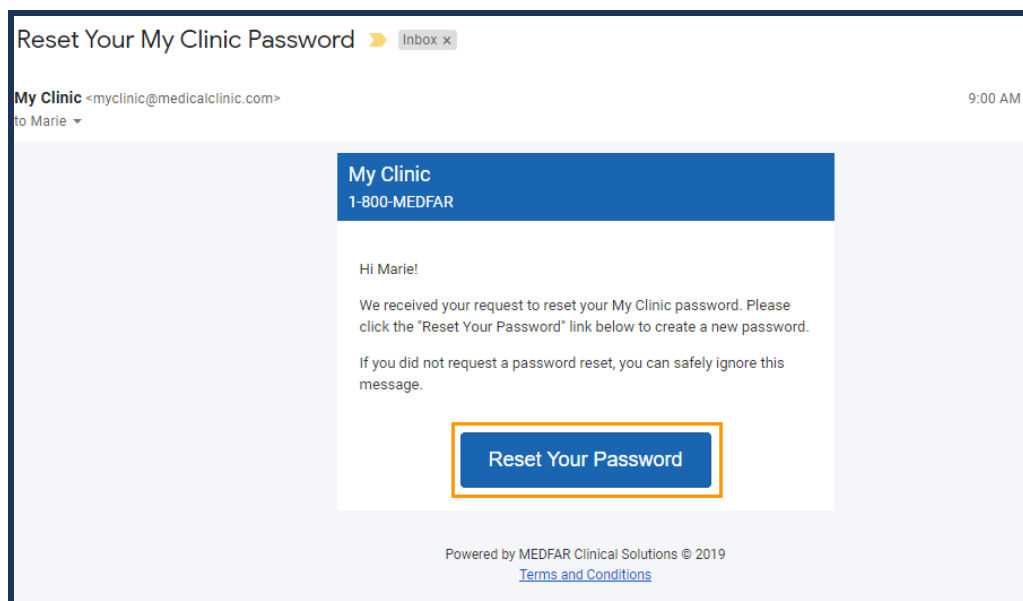


Please enter the email used to register your account

Email

[Reset Password](#)

- A message will let you know an email was sent with a recovery link.
4. Connect to your email inbox, open the message from your clinic and click *Reset Your Password*.



Reset Your My Clinic Password Inbox x

My Clinic <myclinic@medicalclinic.com> 9:00 AM
to Marie ▾

My Clinic
1-800-MEDFAR

Hi Marie!

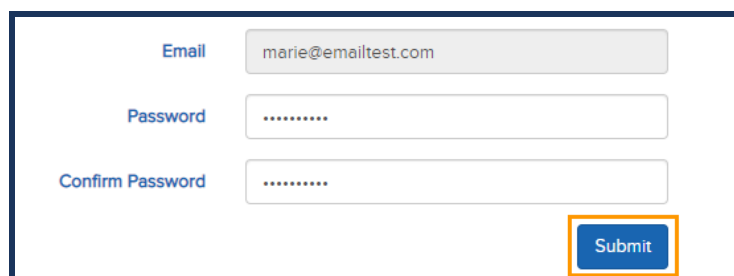
We received your request to reset your My Clinic password. Please click the "Reset Your Password" link below to create a new password.

If you did not request a password reset, you can safely ignore this message.

[Reset Your Password](#)

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[Terms and Conditions](#)

- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
 - You are redirected to a recovery login page.
5. Create a new password, confirm it and click *Submit*.



Email

Password

Confirm Password

[Submit](#)

- The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
- You can now browse through your portal account.

Managing Your Portal Account

Clinics offer multiple services available on their online patient portal.

Browsing Your Portal Account

Your portal account is divided into 4 sections; the header menu at the top, the navigation tabs on the left sidebar, all the recent activity on the right-hand side and the content in the center of the page.

- The header menu features information related to your portal account.
 - The clinic's name and contact information.
 - The language settings and logout option.
- The left side menu contains all the navigation tabs to your portal account.
 - The name and information of the currently selected profile gives access to the dashboard.
 - All the tabs giving you access to the clinic's different services.
- The recent activity section displays a chronological timeline of the last few actions related to the current profile.
 - The recent activity lines are clickable so you can be easily redirected to a specific action. This section can be used to navigate quickly within the portal account.
- The content at the center of the page discloses all the information related to the selected tab.

Modifying Your Profile

You can modify all personal information registered to your account at anytime. However, be aware that the changes made to your portal account, like a new address, will not update the clinic's medical records. You will have to ask the clinic to apply the changes to your file.

To change your personal information on your portal account, follow the steps below:

1. Select the *Profile* tab from the navigation menu to manage all your personal information.

2. Click *Edit* in the *Personal Information* section.

- a. Edit the incorrect information by modifying the pre-filled boxes.
 - Fields with a red asterisk are mandatory.

- b. Click *Save* to update your profile information or select *Cancel* if no changes were made or if you do not want to apply them.

The screenshot shows the 'Profile' page with the 'Personal Information' section. It contains several form fields: 'First Name' (Marie), 'Last Name' (Lévesque), 'Medicare Number' (RAMQ / MCFM 1510 2114), 'Date of Birth' (1980-10-10), 'Gender' (Female selected), 'Marital Status' (empty dropdown), and 'Preferred Language' (English). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by an orange box.

3. Click *Edit* in the *Contact* section to modify your notification settings.

The screenshot shows the 'Contact' section of the profile. It lists two phone numbers: 'Primary • Mobile' (514) 555-4444 and 'Phone' (418) 333-4444. Below these, it shows 'Primary • Notify' as marie@emailtest.com. An 'Edit' button is located in the top right corner, highlighted by an orange box.

- a. Edit the incorrect information by modifying the pre-filled boxes.
- b. Add a phone number to your profile by clicking *Add Telephone Number*.
- i. Enter the new number with the regional code.
 - ii. Use the dropdown options on the right to choose the type of telephone you are adding.
 - iii. Check *This is my primary telephone number* if applicable.

Telephone Number (514) 555-4444 Other • Mobile

☒ This is my primary telephone number

Telephone Number (418) 333-4444 Other • Phone

☐ This is my primary telephone number

[+ Add Telephone Number](#)

- c. Repeat the previous steps if you wish to add another telephone number.
- d. Add a new email address to your profile by clicking *Add Email Address*.
 - i. Enter your email in the dedicated field.
 - ii. Use the drop-down options on the right to choose the type of email address you are adding.
 - iii. Check *Receive notifications at this email address* if desired.

Email marie@courieltest.com Other

☒ Receive notifications at this email address

Email courrieltest@gmail.com Other

☐ Receive notifications at this email address

[+ Add Email Address](#)

[Cancel](#) [Save](#)

- e. Repeat the previous steps if you wish to add another email address.
- f. To remove a telephone number or email address from your profile, click the **X** at the right of the undesired information.

- g. Click *Save* to update the information or select *Cancel* if no changes were made or if you do not want to apply them.

Telephone Number Canada (514) 555-4444 Other • Mobile X

☒ This is my primary telephone number

Telephone Number Canada (418) 333-4444 Other • Phone X

☐ This is my primary telephone number

[+ Add Telephone Number](#)

Email marie@courieltest.com Other X

☒ Receive notifications at this email address

Email courieltest@gmail.com Other X

☐ Receive notifications at this email address

[+ Add Email Address](#)

Cancel Save

4. Click *Edit* in the *Address* section to change your physical address information.

Address Edit

Primary • Other 1000 Main Street
Montreal QC H1T1H1
Canada

- a. Edit the incorrect information by modifying the pre-filled boxes.
- b. Add a new address by clicking *Add Address*.
 - i. Choose a country from the drop-down options.

Country * X

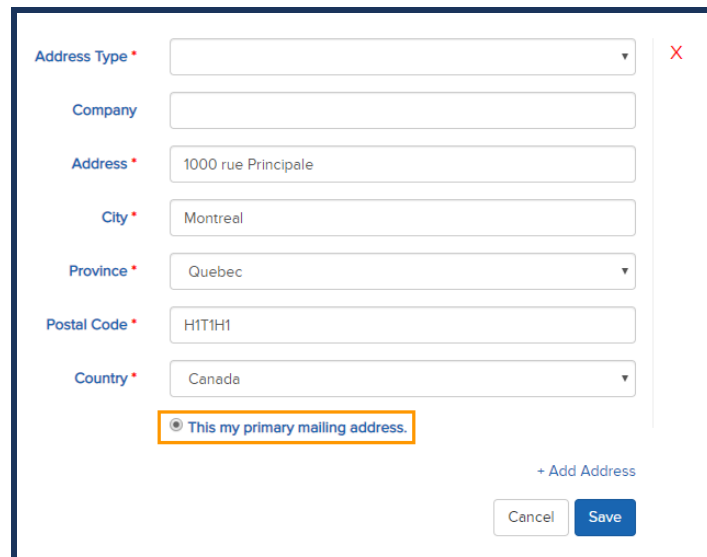
☐ This my primary mailing address.

[+ Add Address](#)

Cancel Save

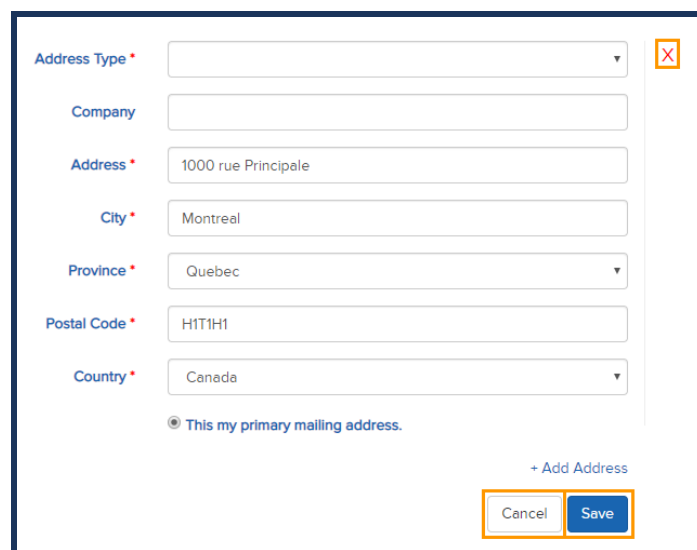
- o If you chose the wrong country, you can change it at the bottom of the form.

- Fields with a red asterisk are mandatory.
- ii. Fill in the required information and use the drop-down choices in the specified boxes.
- iii. Check *This is my primary mailing address* if applicable.



A screenshot of a web form for adding an address. The form includes fields for Address Type, Company, Address, City, Province, Postal Code, and Country, each with a red asterisk indicating it is mandatory. Below these fields is a checkbox labeled "This my primary mailing address." which is highlighted with an orange box. To the right of the form is a red "X" icon. At the bottom right, there is a "+ Add Address" link, a "Cancel" button, and a "Save" button.

- c. Repeat the previous steps if you wish to add another address.
- d. To remove an existing address, click the **X** next to it.
- e. Click *Save* to update your information or select *Cancel* if no changes were made or if you do not want to apply them.

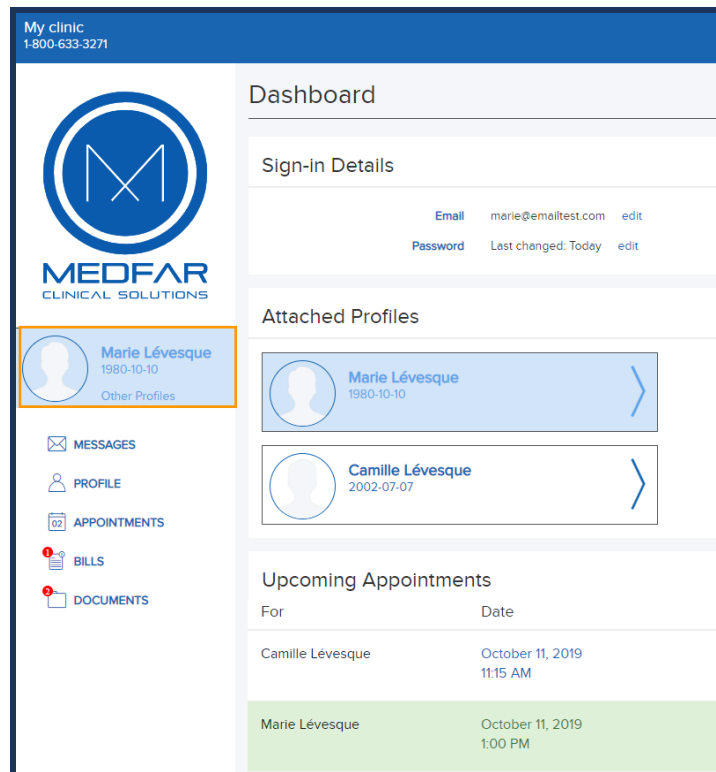


A screenshot of the same address form, but with different highlights. The red "X" icon is now highlighted with an orange box. The "Cancel" and "Save" buttons at the bottom right are also highlighted with an orange box. The "This my primary mailing address." checkbox remains unchecked.

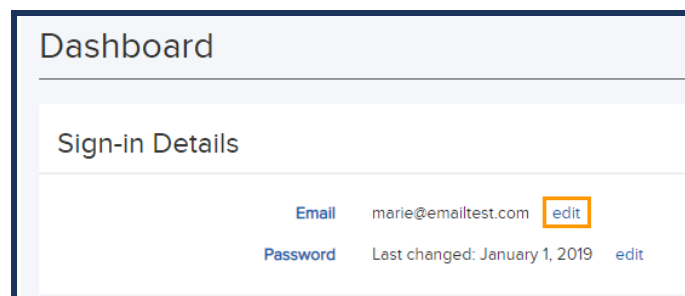
Accessing Your Dashboard

The dashboard is the landing page of your portal account. From this page, you can manage your login settings, your future appointments and the different profiles linked to your account, if applicable. To learn how to use the *Dashboard*, follow the steps below:

1. Click on your name in the margin on the left side of the page to get to the dashboard.

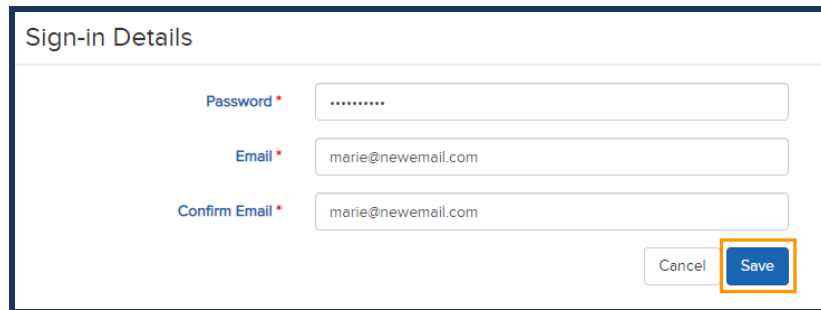


2. Select *edit* on the right side of your email address if you wish to change the login email address of your portal account.



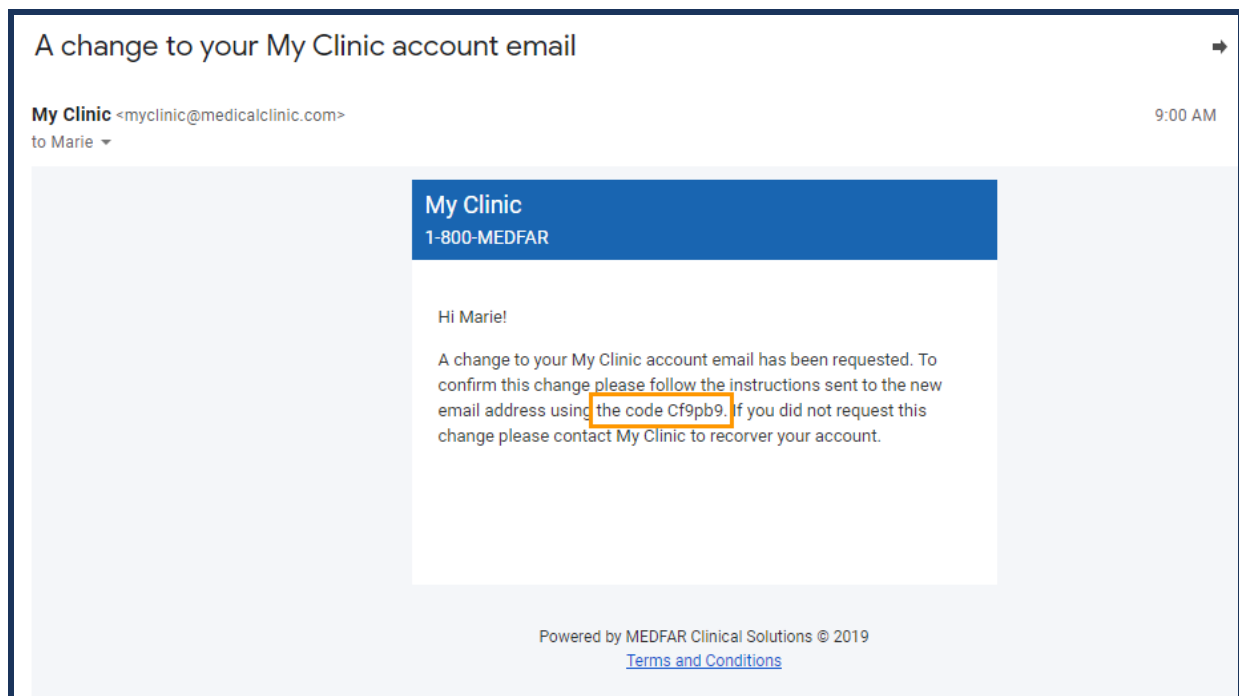
- You will not be able to change the email address to one that is already registered to another portal account.

- a. Enter your password in the required field to confirm you are the account owner.
- b. Enter the new email address and confirm it.
- c. Click *Save* to apply the modification.



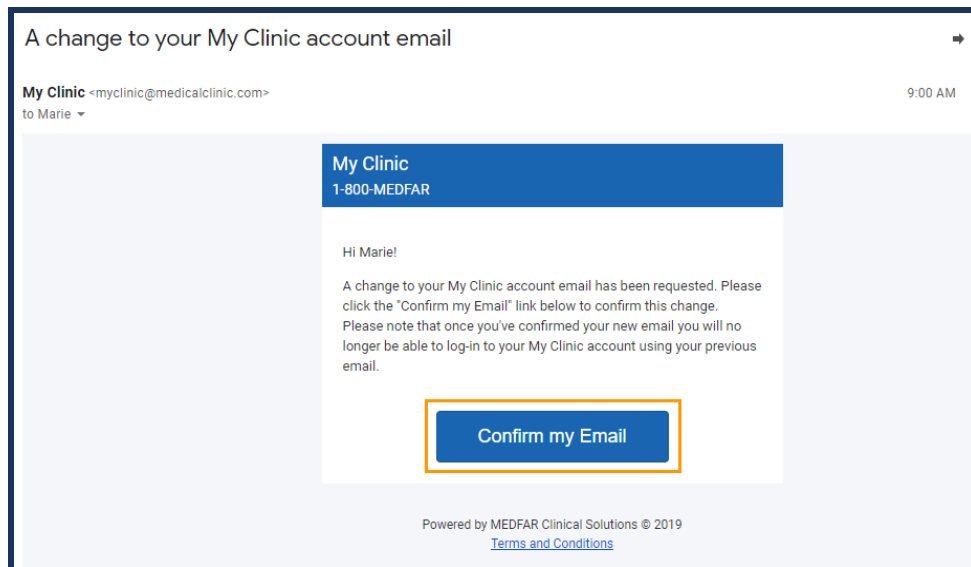
The image shows a 'Sign-in Details' form with three input fields: 'Password *' containing '*****', 'Email *' containing 'marie@newemail.com', and 'Confirm Email *' containing 'marie@newemail.com'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with an orange border.

- d. Select *Done* from the pop-up window.
- e. A message is sent to your old email address with an activation code.



- f. A message is sent to your new email address with a link to access the confirmation page.

- i. Click on the link to be redirected to the confirmation page.



- o The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
- g. Enter the code provided in the *Clinic Code* field.
- h. Click *Submit* to access your portal account.

Email marie@newemail.com

Clinic Code Cf9pb9

Submit

3. Select *edit* on the right side of the password section if you wish to change your current password.

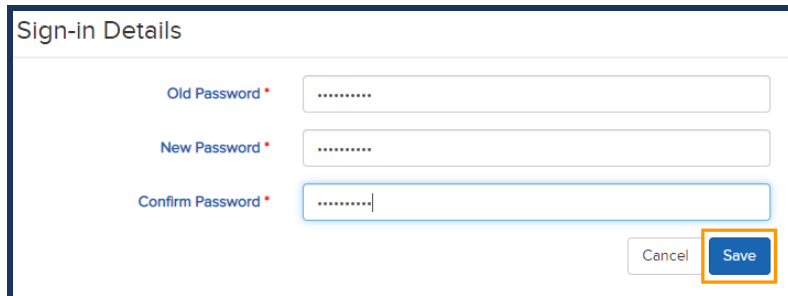
Dashboard

Sign-in Details

Email marie@emailtest.com edit

Password Last changed: January 1, 2019 edit

- To change your password from this section you must know your current one. If you do not remember your current password, use the *Forgot your password?* on the login page.
- a. Enter your current password in *Old Password*.
- b. Enter your new password and confirm it.
 - The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, \$...).
- c. Click *Save* to apply the modification.

A screenshot of a 'Sign-in Details' form. It contains three input fields: 'Old Password *', 'New Password *', and 'Confirm Password *'. Each field has a masked password (dots). At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with an orange border.

- d. Select *Done* from the pop-up window.
4. Select a profile to take actions under it. If no other profiles are linked to your account, your profile will be selected by default.

A screenshot of an 'Attached Profiles' section. It displays a list of two profiles. The first profile is 'Camille Lévesque' with a birth date of '2002-07-07'. The second profile is 'Marie Lévesque' with a birth date of '1980-10-10'. The second profile is highlighted with a blue background. Each profile entry includes a circular profile picture placeholder and a right-pointing chevron icon.

- The selected profile will turn blue and its name will appear on the left sidebar.

5. Use the *Upcoming Appointments* section to have a quick view of the next appointments for all the profiles linked to your account.

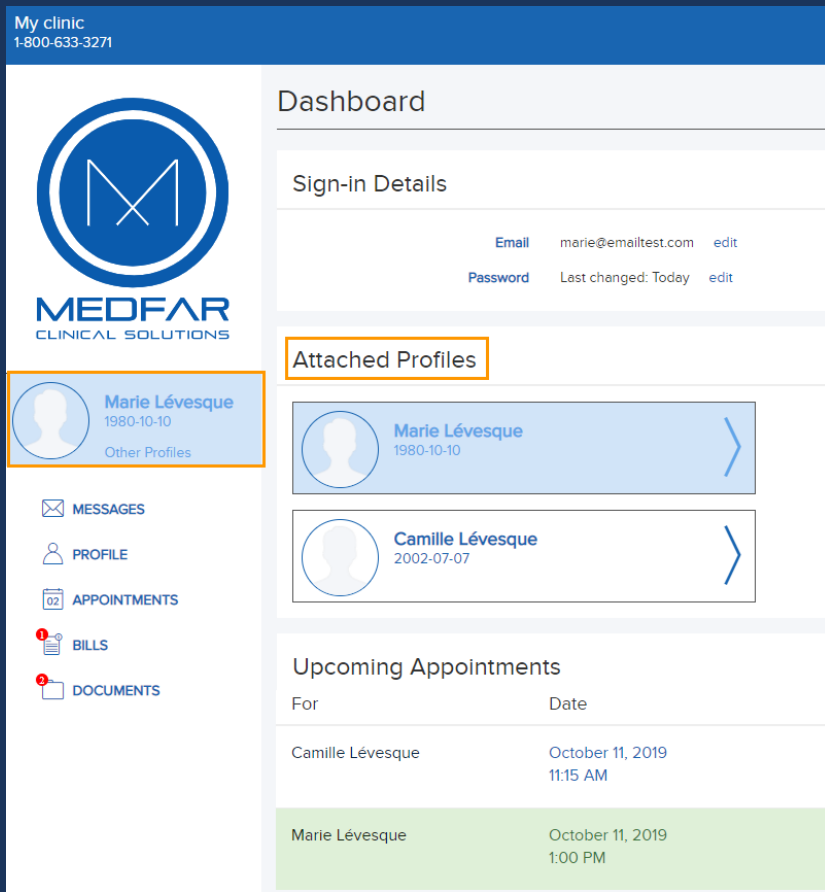
Upcoming Appointments	
For	Date
Camille Lévesque	October 11, 2019 11:15 AM
Marie Lévesque	October 11, 2019 1:00 PM

- Your appointments can be managed from both the *Dashboard* and the *Appointments* tab. See how to do so [here](#).

Managing Multiple Profiles Within One Account

If you manage someone else's medical care, like a child or elderly person, and have a portal account under your name, you can ask the clinic to add their profile to your portal account. To learn how to manage multiple profiles, follow the steps below:

1. Communicate with your clinic to add a profile to your portal account.
 - a. Call your clinic and ask them to add the profile of the person under your care to your portal account.
 - If that person is over 14 years old, the clinic will need their approval.
 - b. Determine with the clinic which tabs are necessary to manage the profile of the person under your care: booking appointments, viewing bills, documents and messages.
2. Log into your portal account.
 - a. Click on your name in the left side menu. In the *Attached Profiles* section, you will see all the profiles to which you have access.



My clinic
1-800-633-3271

MEDFAR
CLINICAL SOLUTIONS

Dashboard

Sign-in Details

Email: marie@emailtest.com [edit](#)

Password: Last changed: Today [edit](#)

Attached Profiles

Marie Lévesque
1980-10-10
[Other Profiles](#)

Marie Lévesque
1980-10-10

Camille Lévesque
2002-07-07

Upcoming Appointments

For	Date
Camille Lévesque	October 11, 2019 11:15 AM
Marie Lévesque	October 11, 2019 1:00 PM

MESSAGES

PROFILE

APPOINTMENTS

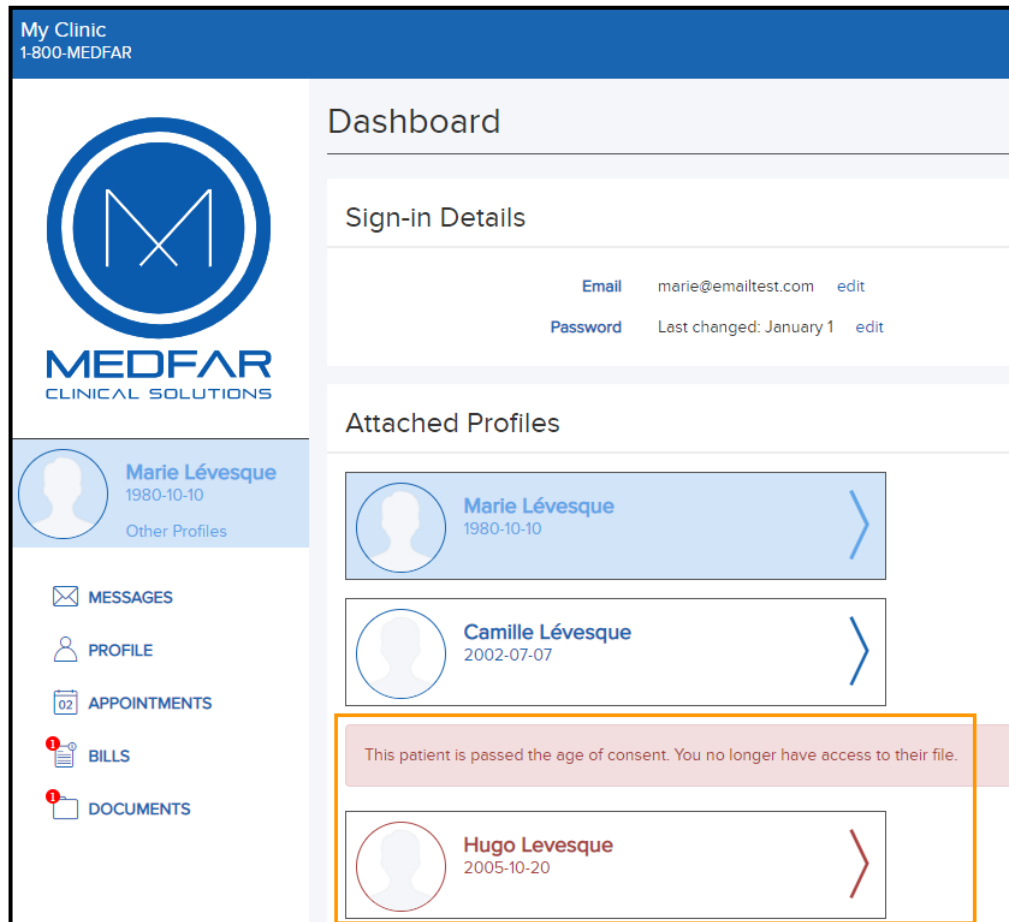
BILLS

DOCUMENTS

3. Select the profile for which you want to take actions.
 - Once the profile is selected, its name will appear in the left sidebar. From now on, all the actions you take will affect this profile only.

Losing Access to a Profile

Since a person younger than 14 years old is not allowed to have a portal account, a parent or guardian can add the child's profile to their own portal account. However, the day the child turns 14, the parent or guardian will lose access to the child's profile and the following message will be on the account:



For the parent or the guardian to regain the access to the child's profile, they must contact the clinic directly. The child must give their approval for the parent to be granted access to his medical profile.

Managing Appointments

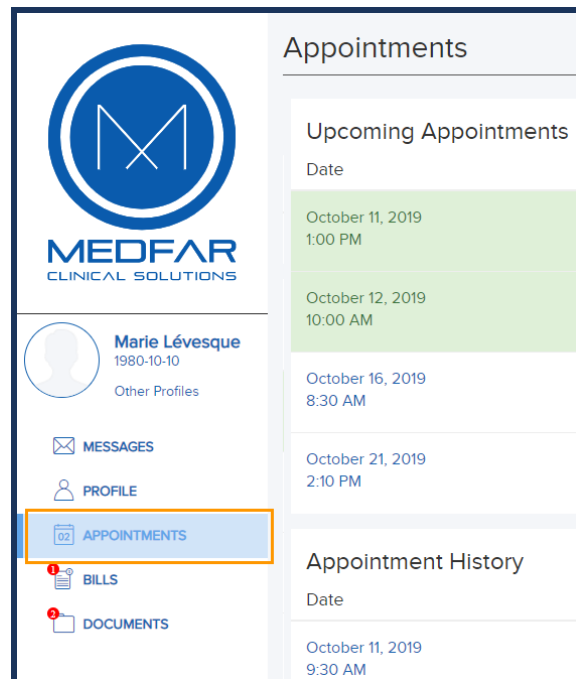
You can book, confirm and cancel appointments with your clinic's healthcare professionals directly from your portal account.

Booking an Appointment From Your Portal Account

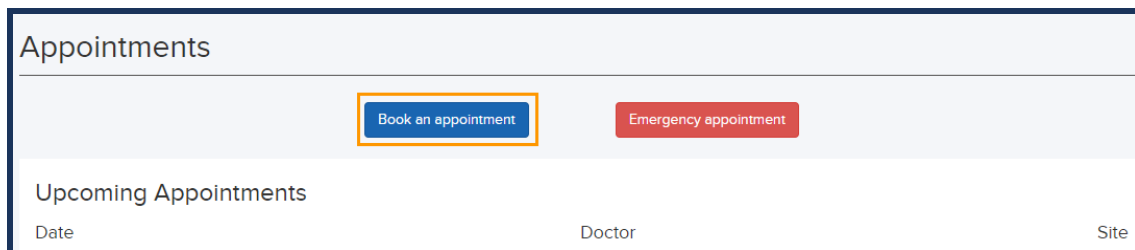
Booking an appointment online lets you view the available slots in a calendar format and makes it easier for you to compare those availabilities to your personal schedule. To book an appointment, follow the steps below:

1. Access your portal account.

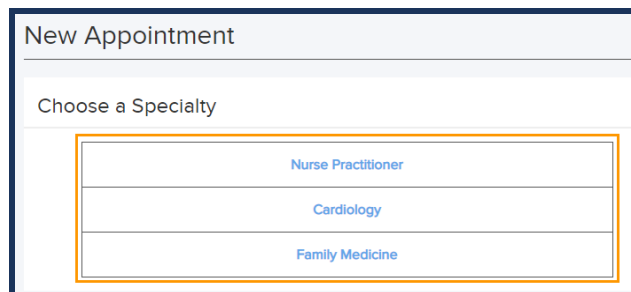
2. Click the *Appointments* tab.



3. Select *Book an appointment*.



4. Choose a specialty that fits the type of consultation you are seeking.



- The specialties offered vary depending on the clinic.

5. Select the address that fits best with your location if your clinic has multiple site options.

The screenshot shows the 'New Appointment' form with the 'Location' step selected. The 'Choose a Location' section contains two options: 'My Clinic' (1000 Main street, Montreal, QC, H1T1H1) and 'My Clinic Extern' (100 Champlain street, Montreal, QC, H2T2H2). Both options are highlighted with orange borders and blue chevrons on the right. 'Back' and 'Next' buttons are at the bottom right.

- The clinic's addresses are displayed in the boxes to help you choose the preferred one.
6. Choose the practitioner with whom you want to book the appointment.
 - a. Click *All Professionals* if you don't have a preference as who will handle your visit.
 - b. Choose the name of a healthcare specialist if you only want to select an appointment from their availabilities.

The screenshot shows the 'New Appointment' form with the 'Practitioner' step selected. The 'Choose a Practitioner' section contains three options: 'All Professionals', 'Dr. Alexander Marion', and 'Dr. Isabelle Cornet'. Each option is highlighted with an orange border and a blue chevron on the right. 'Back' and 'Next' buttons are at the bottom right.

7. Select the type of appointment that best fits your needs.

New Appointment

Family Medicine > My Clinic > All Professionals > Appointment Type

Choose an Appointment Type

Walk-in

Walk-in - follow up with doctor (20 minutes)
Do not forget to bring your medical card

Annual Follow Up

Annual follow-up visit with medical care practitioner (30 minutes)
Please bring to your appointment a list of all the questions you want to ask your doctor.

Back Next

- Every clinic has its own types of appointments.
8. Provide more information to narrow your search.
- a. Use one of the 2 options below to configure the calendar:
 - i. Check *As soon as* to see the next available options.
 - ii. Check *Anytime after* to see options starting from that date. Add a date or click the dropdown menu to choose from the calendar.
 - b. Use the blank field to add information describing the reason for the appointment.
 - c. Click *Next*.

New Appointment

Family Medicine > My Clinic > All Professionals > Walk-in

When would you like the appointment?

☒ As soon as possible

☐ Anytime after: yyyy-mm-dd

In a few words, describe the reason for the appointment

Back Next

9. Select the time slot that works best with your schedule.

Choose an Availability

14 - 20 October

	Morning	Afternoon
Mon 14	No Availability	No Availability
Tue 15	No Availability	No Availability
Wed 16	8:00 AM Dr. Alexander Marion 9:00 AM Dr. Alexander Marion	No Availability
Thu 17	No Availability	1:00 PM Dr. Isabelle Cornet 2:00 PM Dr. Isabelle Cornet
Fri 18	No Availability	1:00 PM Dr. Marion D Test 1:40 PM Dr. Marion D Test

- a. Use the arrows at the top of the page to change between weeks.
- b. Select an appointment by clicking on the desired slot.
 - o You are redirected on the details page.
 - i. Check the details to make sure that you selected the correct appointment.
- c. Click *Confirm Appointment* to book it or select *Back* to return to the schedule and choose a new appointment.

Confirm Appointment

Dr. Alexander Marion

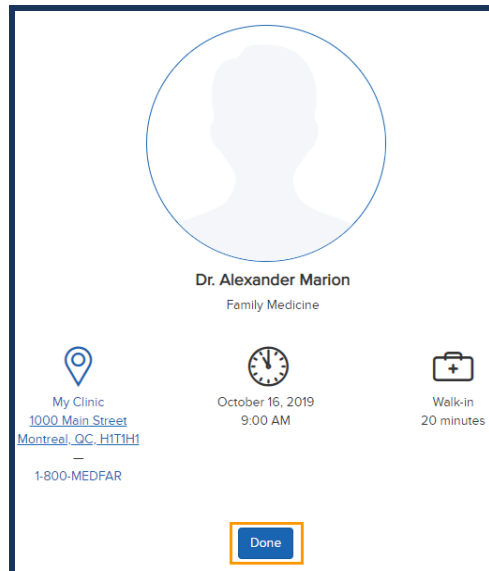
My Clinic
1000 Main Street
Montreal, QC, H1T1H1
1-800-MEDFAR

October 16, 2019
9:00 AM

Walk-in
20 minutes

Back Confirm Appointment

- d. Click *Done* when your choice is made.

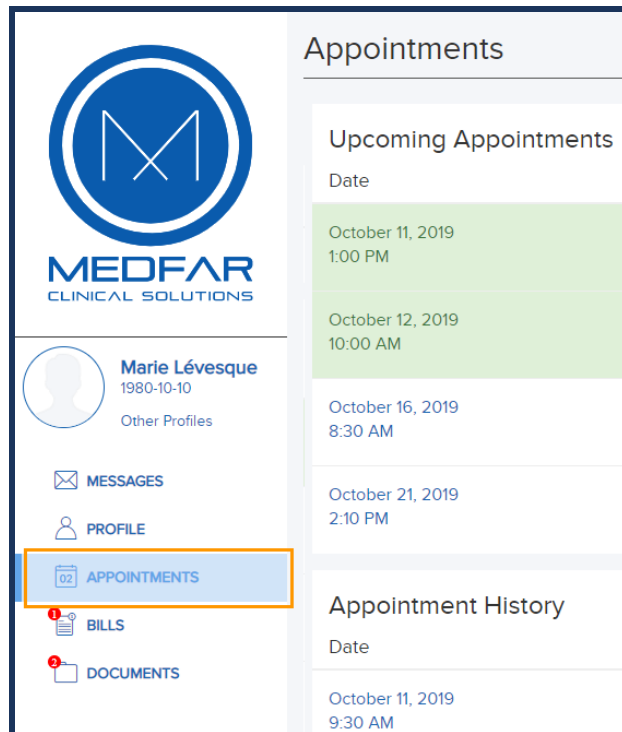


- You are redirected to the *Appointments* tab. You can view and manage your future appointments.
- A booked appointment can only be confirmed 72 hours beforehand.

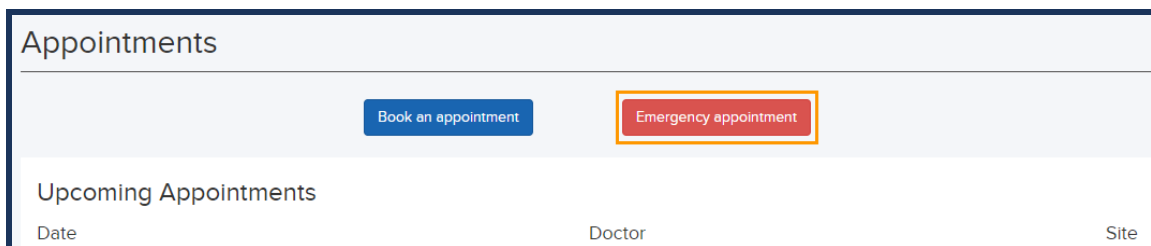
Booking an Emergency Appointment From Your Portal Account

Emergency appointments are meant to book a consultation with a health professional and are reserved for emergencies. To book an emergency appointment, follow the steps below:

1. Access your portal account.
2. Click the *Appointments* tab.



3. Choose *Emergency Appointment*.



4. Select the address that fits best with your location if your clinic has multiple site options.

The screenshot shows the 'Emergency Appointment' form with the title 'Emergency Appointment' at the top. Below the title are two tabs: 'Location' (active) and 'Appointment Type'. The main heading is 'Choose a Location'. There are two location options listed in boxes, each with a right-pointing arrow: 'My Clinic' (1000 Main Street, Montreal, QC, H1T1H1) and 'My Clinic Extern' (100 Champlain Street, Montreal, QC, H2T2H1). A 'Next' button is at the bottom right.

- The clinic's addresses are displayed in the boxes to help you choose the preferred one.

5. Select the type of appointment that best fits your needs.

The screenshot shows the 'Emergency Appointment' form with the title 'Emergency Appointment'. Below the title are two tabs: 'My Clinic' (active) and 'Appointment Type'. The main heading is 'Choose an Appointment Type'. There are two appointment type options listed in boxes, each with a right-pointing arrow: 'MINOR EMERGENCY' (For consultations regarding one issue only (e.g. flu, ear infection, U...)) and 'COMPLEX EMERGENCY' (For consultations regarding multiple issues or for mental health pr... minutes). A 'Back' button and a 'Next' button are at the bottom right.

6. Enter the reason for your appointment in the blank field.

- a. Click *Next*.

The screenshot shows the 'Emergency Appointment' form with the title 'Emergency Appointment'. Below the title are three tabs: 'My Clinic' (active), 'COMPLEX EMERGENCY' (active), and 'Qu...'. The main heading is 'In a few words, describe the reason for the appointment'. There is a large text input field. A 'Back' button and a 'Next' button are at the bottom right.

7. Select the time slot that works best with your schedule.

Choose an Availability

< 14 - 20 October >

	Morning	Afternoon
Mon 14	No Availability	No Availability
Tue 15	No Availability	No Availability
Wed 16	No Availability	No Availability
Thu 17	8:00 AM Dr. Isabelle Cornet 8:30 AM Dr. Isabelle Cornet	No Availability
Fri 18	No Availability	1:00 PM Dr. Isabelle Cornet 1:30 PM Dr. Isabelle Cornet
Sat 19	9:30 AM Dr. Alexander Marlon 10:00 AM Dr. Alexander Marlon	No Availability
Sun 20	No Availability	No Availability

Back

- Use the arrows at the top of the page to change the week.
- Select an appointment by clicking on the desired time.
 - You are redirected on the details page.
 - Check the details to make sure that you selected the correct appointment.
- Click *Confirm Appointment* to book it or select *Back* to return to the schedule and choose a new appointment.

Confirm Appointment

Dr. Alexander Marlon

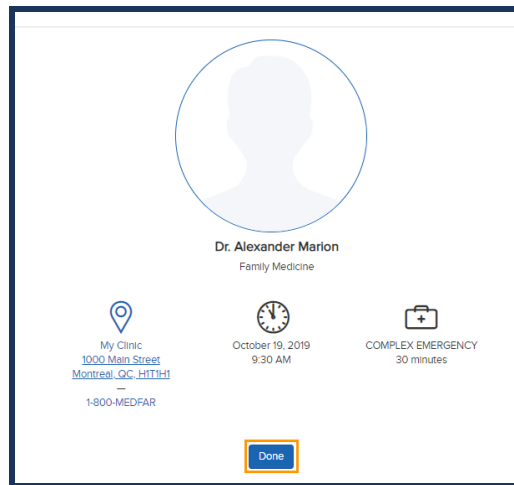
My Clinic
1000 Main Street
Montreal, QC, H2T1H1
1-800-MEDFAR

October 19, 2019
9:30 AM

COMPLEX EMERGENCY
30 minutes

Back Confirm Appointment

- d. Click *Done* when your choice is made.



- You are redirected to the appointments tab. You can view and manage your future appointments.
- A booked appointment can only be confirmed 72 hours beforehand.

Confirming and Cancelling an Appointment From the Portal

You can confirm and cancel an appointment directly from your portal account. Appointments, confirmed or not, can be cancelled online up to 48 hours before their time. If you want to cancel an appointment that is in less than 48 hours, you must call the clinic. To cancel an appointment from the portal, follow the steps below:

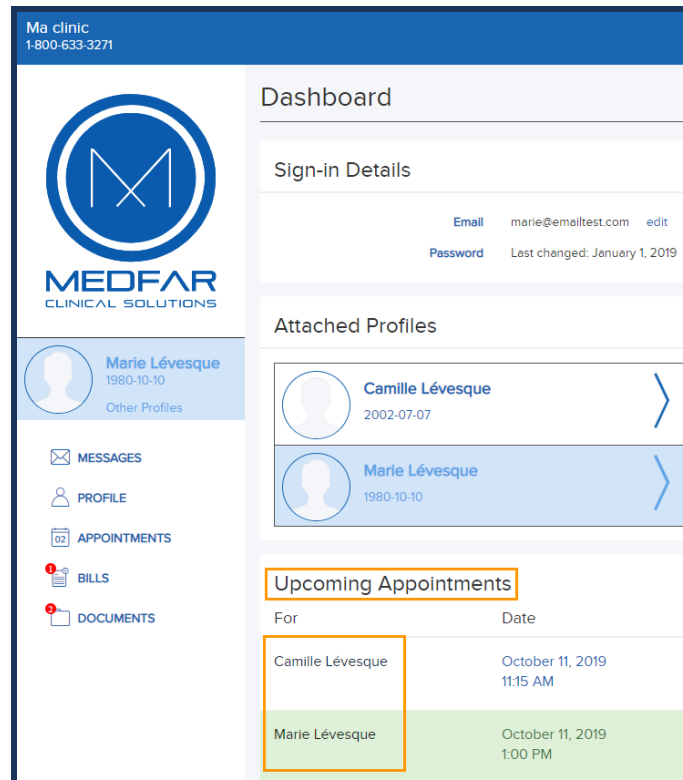
1. Access your portal account.
2. Manage your appointments using the *Appointments* tab or the *Dashboard*.
 - a. Select *Appointments* from the navigation menu to view your entire history.

Upcoming Appointments		
Date	Doctor	Site
October 11, 2019 1:00 PM	Dr. Alexander Marion Family Medicine	My Clinic
October 12, 2019 10:00 AM	Dr. Isabelle Cornet Dermatologist	My Clinic Extern
October 16, 2019 9:00 AM	Stephane Potras SNP	My Clinic
October 19, 2019 9:30 AM	Dr. Alexander Marion Family Medicine	My Clinic
October 21, 2019 2:10 PM	Stephane Potras SNP	My Clinic

Appointment History		
Date	Doctor	Site
October 16, 2019 8:30 AM	Dr. Isabelle Cornet Dermatologist	My Clinic Extern

- If you have multiple profiles linked to your account, the history displayed in the *Appointments* tab will only show the history associated with the profile selected, whose name is in the left side menu.

- b. Click your name in the left side menu to access your *Dashboard* and review the list of future appointments.

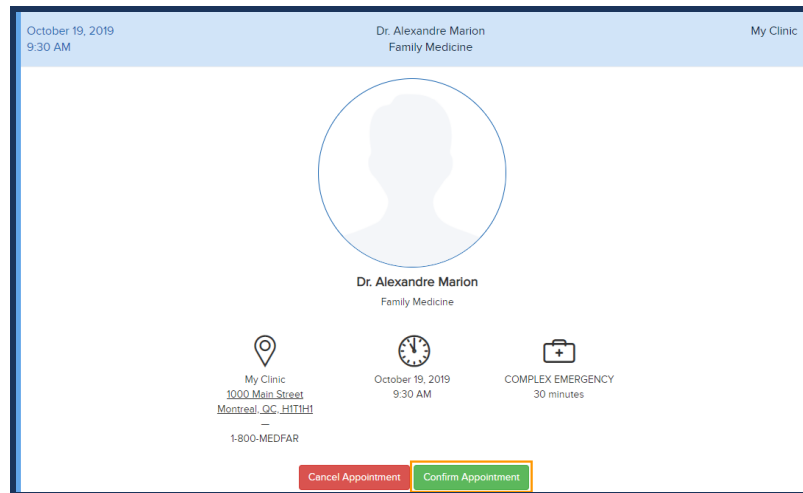


- If you have multiple profiles linked to your portal account, you will be able to see future appointments for everyone on your *Dashboard*.
- 3. View the details of an already booked appointment by clicking on it.
 - Appointments in white are booked and have yet to be confirmed.
 - Appointments in red are cancelled.
 - Appointments in green are booked and confirmed.
- a. Expand the detailed view of an appointment by clicking on the coloured header.

Take one of the 2 following actions:

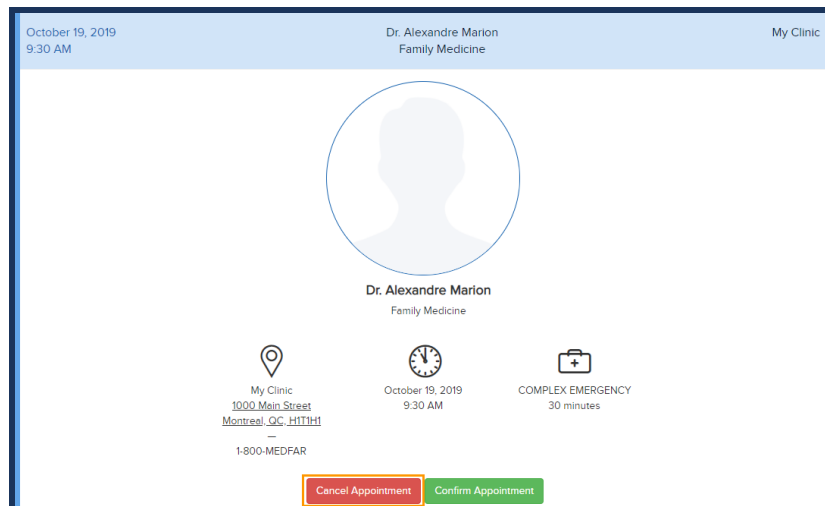
4. Click *Confirm Appointment* to send the confirmation to the clinic.
 - If you don't have the option to confirm an appointment, it means that the consultation is in more than 72 hours. If you want to confirm an appointment you need to be within the allowed period.

- a. Collapse the detailed view of an appointment by clicking on the coloured header to go back.



5. Click *Cancel Appointment* if it no longer suits your schedule.

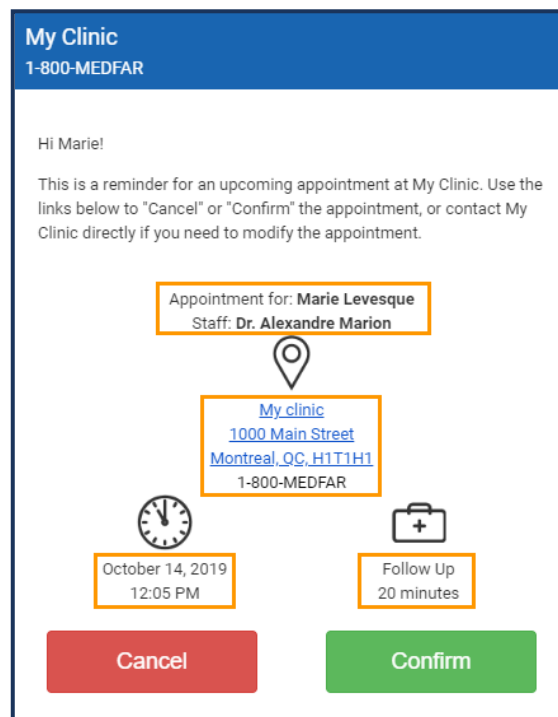
- Appointments, confirmed or not, can be cancelled online up to 48 hours before their time. If you want to cancel an appointment that is in less than 48 hours, you must call the clinic.
- a. Collapse the detailed view of an appointment by clicking on the coloured header.



Confirming and Cancelling an Appointment by Email

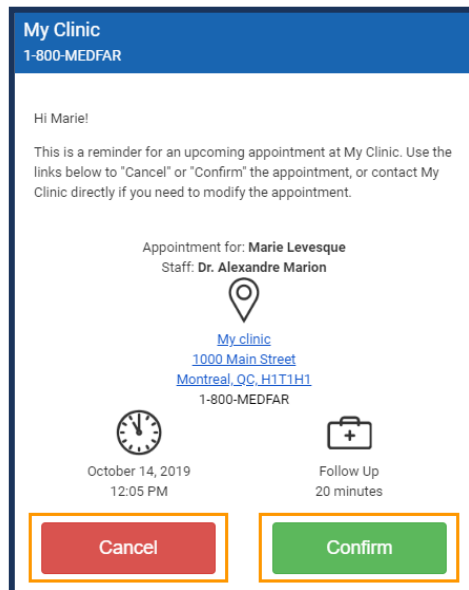
When creating your account, you will receive email notifications and reminders regarding your bookings and communication. To confirm or cancel an appointment by email, follow the steps below:

1. Connect to your email inbox and open the message sent by your clinic.
 - The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox
2. Check the details and verify the information.



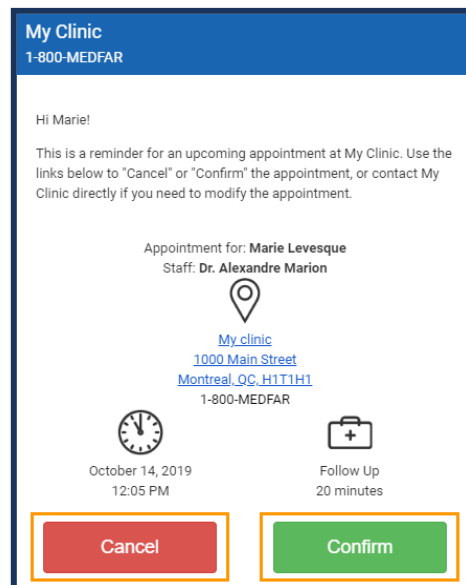
Take one of the 2 following actions:

3. Click *Confirm* to let the clinic know.



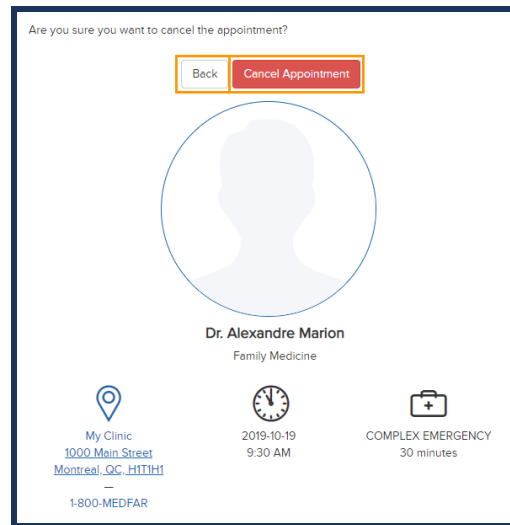
- A new window opens with a confirmation message.

4. Select *Cancel* if it is incompatible with your schedule.



- If you cancel the appointment by mistake, click *Back* in the new window.

- a. Click *Cancel Appointment* to confirm the action.



- b. Log into your portal account to book a new appointment, if needed.

Managing Your Communications

The patient portal offers the clinic a new way of communications information to you. However, note that if you want to contact the clinic, you must call them directly. To manage your communications from your portal account, select one of the following elements:

[Managing Your Messages](#)

[Managing Your Bills](#)

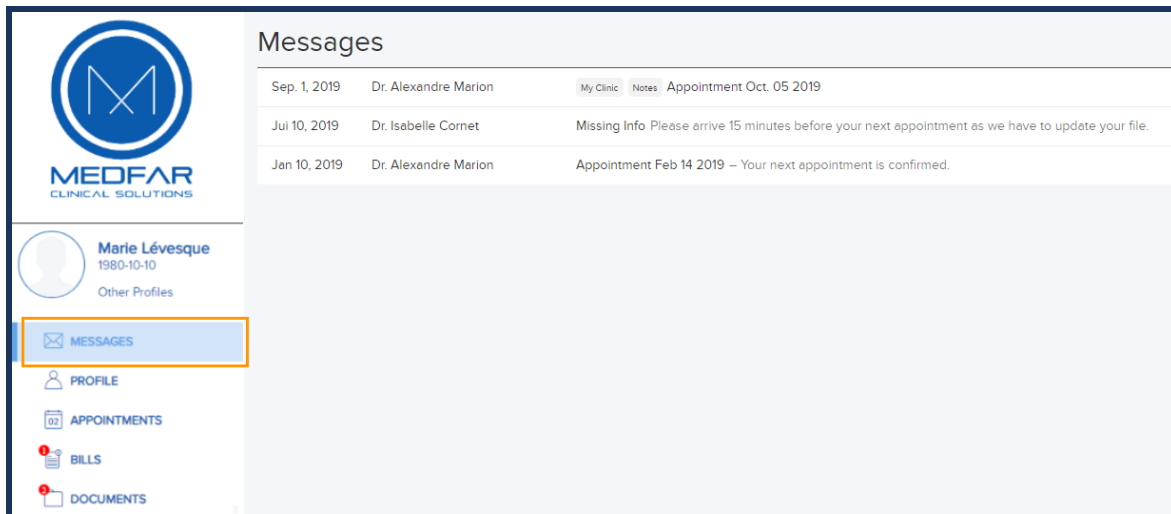
[Managing Your Notifications](#)

Managing Your Messages

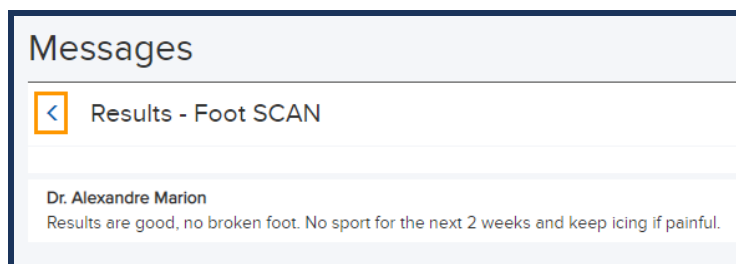
To access the messages sent to your portal account by the clinic, follow the steps below:

1. Click the *Messages* tab in the navigation menu.

- a. Make sure to select the correct profile if you have more than one linked to your account.



- The red bubble next to the *Messages* tab indicates the number of unread messages you have.
2. Open a message by clicking on it.
 - A bold text marks an unread message.
3. Click the arrow at the top to go back to the message list.

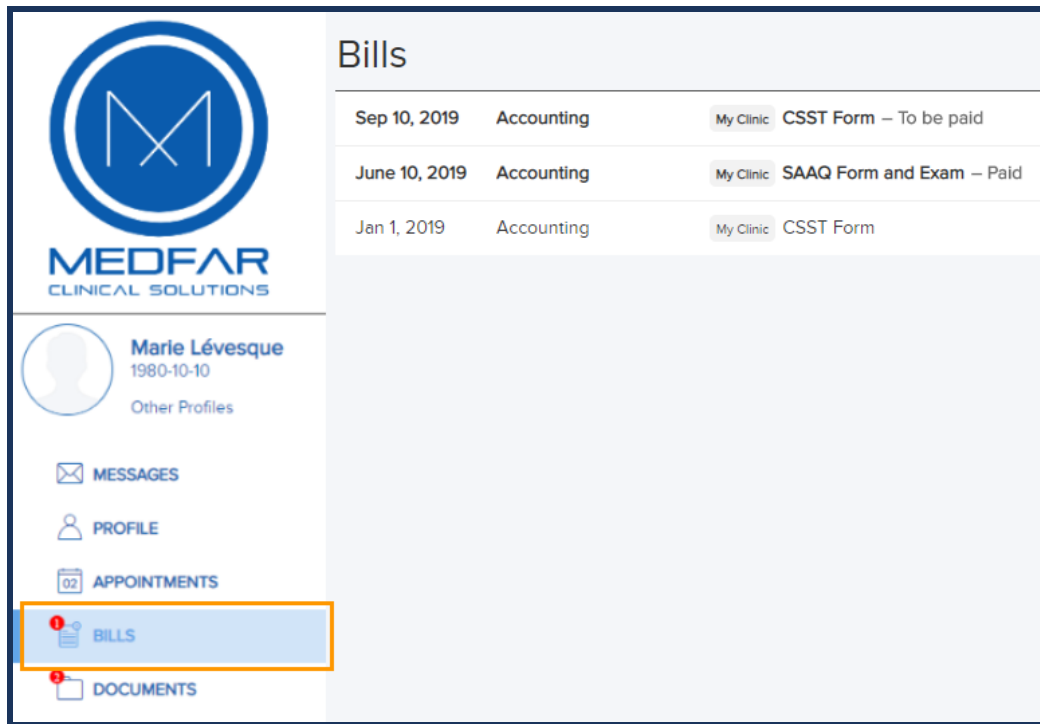


Managing Your Bills

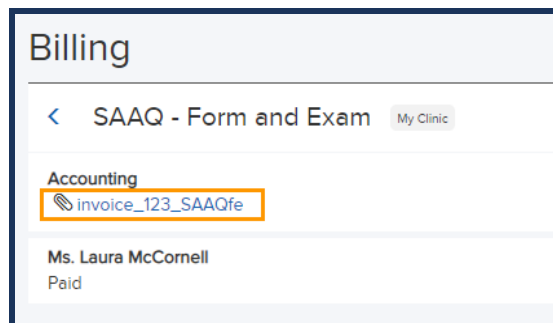
To access invoices sent to your portal account by the clinic, follow the steps below:

1. Click the *Bills* tab in the navigation menu.

- a. Make sure to select the correct profile if you have more than one linked to your account.

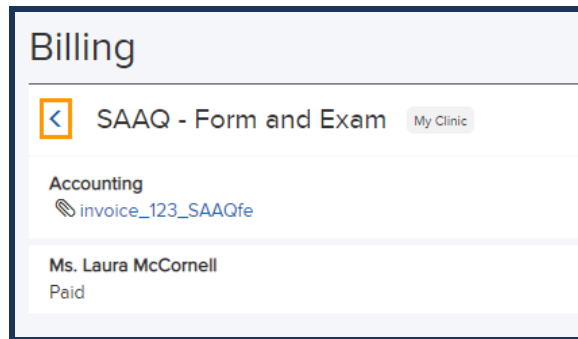


- The red bubble next to the *Bills* tab indicates the number of unread invoices you have.
2. Open an invoice by clicking on it.
 - A bold text marks an unread invoice.
 - a. Open the details of the invoice by clicking on the link.



- b. View, download or print the invoice from the pop-up window.

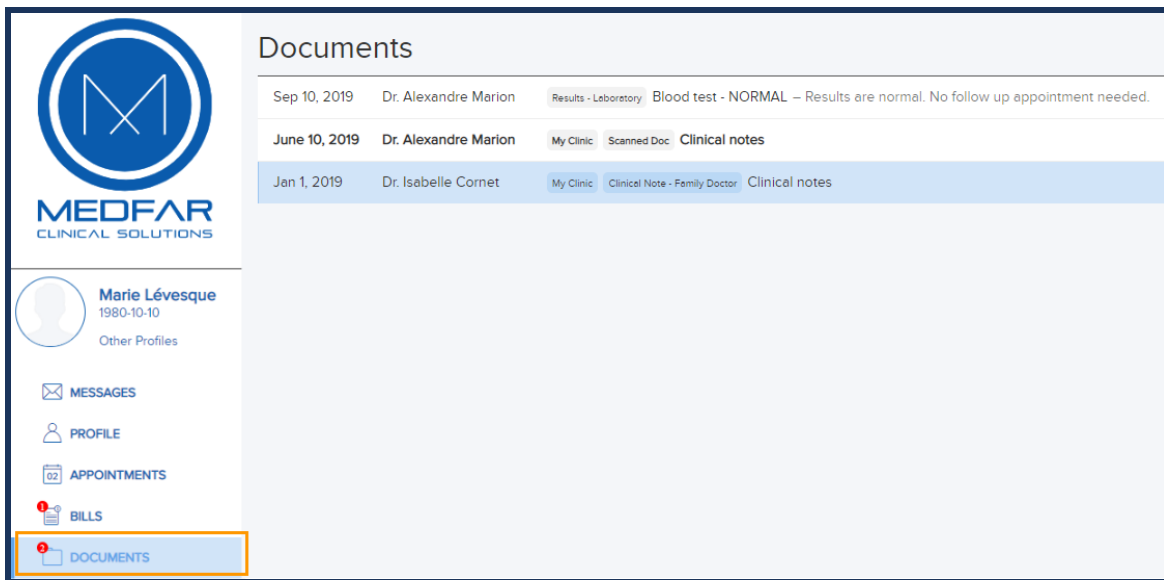
- Click the arrow at the top to go back to the invoice list.



Managing Your Documents

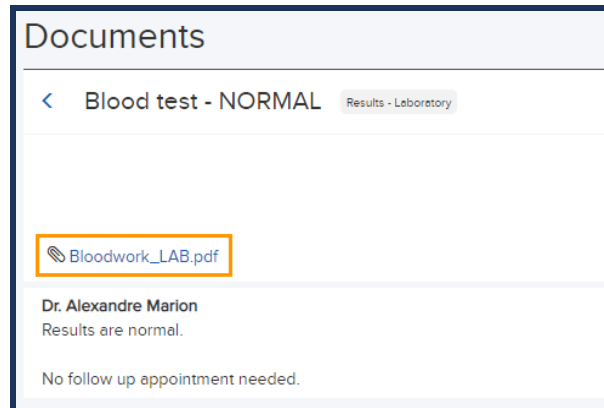
To access documents sent to your portal account by the clinic, follow the steps below:

- Click the *Documents* tab in the navigation menu.
 - Make sure to select the correct profile if you have more than one linked to your account.

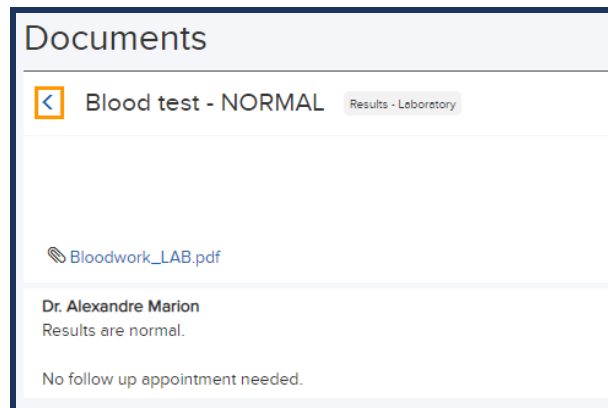


- The red bubble next to the *Documents* tab indicates the number of unread bills you have.
- Open a document by clicking on it.

- A bold text marks an unread document.
- a. Open the details of the document by clicking on the link.



- b. View, download or print the details from the pop-up window.
3. Click the arrow at the top to go back to the document list.



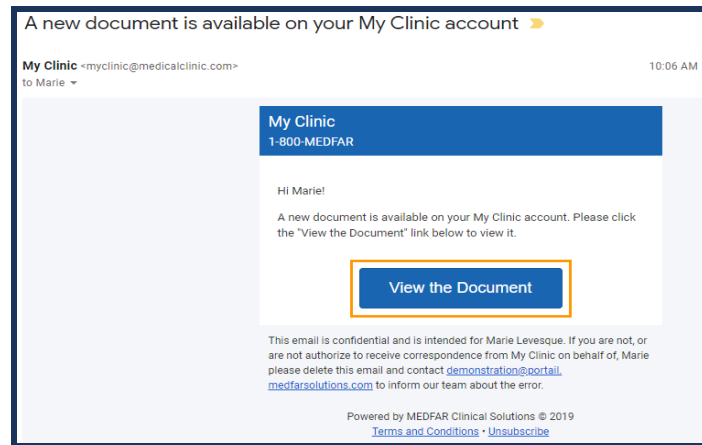
Receiving Email Notifications

For every communication shared to your portal account, an email notification is sent to you. Contact your clinic if you don't want to receive notifications.

If you unsubscribe directly from an email, you will no longer receive emails from the patient portal, even for password resets.

To view the information shared by the clinic, follow the steps below:

1. Connect to your email inbox and open the message from your clinic.



- The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
2. Click *View the Message* or *View the Document* or *View the Invoice*.
 - You are redirected to the patient portal login page.
 - a. Enter the email address linked to your portal account.
 - b. Add your password.
 - c. Click *Login*.

A screenshot of the patient portal login page. It features two input fields labeled 'Email' and 'Password'. Below the 'Password' field is a link that says 'Forgot your password?'. To the right of the 'Password' field is a blue 'Login' button, which is highlighted with an orange border. At the bottom of the page, there is a section for 'New Patient?' with a 'Register' button.

- You land directly on the new communication page.