# Topic

<table>
<thead>
<tr>
<th>Patient Capabilities: Messaging</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Capabilities: Visits</td>
<td>4</td>
</tr>
<tr>
<td>Health Information: What’s in My Record?</td>
<td>5</td>
</tr>
<tr>
<td>Proxy Access</td>
<td>5</td>
</tr>
<tr>
<td>Insurance and Billing</td>
<td>5</td>
</tr>
<tr>
<td>Sign up for a Connect account</td>
<td>6</td>
</tr>
<tr>
<td>Log in to Connect</td>
<td>7</td>
</tr>
<tr>
<td>What if I forget my Connect ID or password?</td>
<td>7</td>
</tr>
<tr>
<td>View or download your medical record</td>
<td>8</td>
</tr>
<tr>
<td>View, download, or send visit records</td>
<td>8</td>
</tr>
<tr>
<td>Share your medical information with someone else</td>
<td>9</td>
</tr>
<tr>
<td>View messages from your clinic</td>
<td>9</td>
</tr>
<tr>
<td>Ask your doctor for medical advice</td>
<td>10</td>
</tr>
<tr>
<td>Request a referral to see another provider</td>
<td>10</td>
</tr>
<tr>
<td>View your past or upcoming appointments</td>
<td>11</td>
</tr>
<tr>
<td>Request or schedule an appointment</td>
<td>12</td>
</tr>
<tr>
<td>View/Print AVS (After Visit Summary) for past visits</td>
<td>12</td>
</tr>
<tr>
<td>Request or schedule an appointment</td>
<td>12</td>
</tr>
<tr>
<td>Cancel an appointment</td>
<td>13</td>
</tr>
<tr>
<td>View your test results</td>
<td>13</td>
</tr>
<tr>
<td>Manage your medications</td>
<td>13</td>
</tr>
<tr>
<td>View a summary of your health information</td>
<td>14</td>
</tr>
<tr>
<td>Respond to questionnaires from your clinic</td>
<td>14</td>
</tr>
<tr>
<td>Family Access</td>
<td>15</td>
</tr>
<tr>
<td>Access a family member’s record</td>
<td>15</td>
</tr>
<tr>
<td>Children 0-11</td>
<td>16</td>
</tr>
<tr>
<td>Adolescent</td>
<td>16</td>
</tr>
<tr>
<td>Adult</td>
<td>17</td>
</tr>
<tr>
<td>View your outstanding balance</td>
<td>17</td>
</tr>
<tr>
<td>Make a payment for an outstanding account balance</td>
<td>17</td>
</tr>
<tr>
<td>Sign up for paperless billing</td>
<td>18</td>
</tr>
<tr>
<td>View claims for services covered by insurance</td>
<td>18</td>
</tr>
<tr>
<td>Review and update your insurance information</td>
<td>18</td>
</tr>
<tr>
<td>Personalize Connect</td>
<td>19</td>
</tr>
</tbody>
</table>
Update your personal information .................................................................................................................... 20
Customize your notification preferences .......................................................................................................... 20
Change your Connect password or update your security question and answer ................................................ 21
Welcome to Connect

Connect is Epic’s customizable patient portal where patients can access their health records and complete tasks essential to managing their care. Patients can access Connect through the web and mobile apps for iOS or Android devices, making many aspects of managing healthcare as convenient as managing an email account.

Through Connect patients and proxies can...

Patient Capabilities: Messaging

- **Inbox.** Send and receive messages, letters, and questionnaires.
- **Get Medical Advice.** Send providers photos and messages with non-urgent questions to see if a visit is needed.
- **Ask Customer Service.** Send non-medical messages to customer service staff.
- **Referrals.** Request a referral to a specialist.
- **Clinic Calls.** Review details of care advice calls and customer service calls.
- **Rx Refill Requests.** Ask for a prescription renewal. If your organization has integrated pharmacies, the refill is sent directly there.
- **E-Visits.** Submit questionnaires, photos, videos, and symptoms as an e-visit for physicians to review and follow up on.

Patient Capabilities: Visits

- **Upcoming Appointments.** See details about future appointments, including instructions and driving directions.
- **Appointment Management.** Directly schedule, confirm, and cancel appointments and enter details about reasons for the visit.
- **After Visit and Admission Summaries.** View and download details of past appointments and admissions.
- **eCheck-In.** Complete most of the check-in process from home, like paying visit copays, verifying allergies and medications, and esigning documents.
- **Open Scheduling.** Search open slots by specialty and type. Even new patients without Connect can schedule appointments this way.
- **Scheduling Tickets.** Directly schedule recommended appointments from tickets created by certain related orders.
- **Fast Pass.** Join the wait list and move appointments to an earlier date or time after being notified that a slot is available.
- **Video Visits.** Receive face-to-face care without leaving home. This is especially helpful for rural or limited-mobility patients.

This guide provides an overview of many of Connect’s features and how to use them.
Health Information: What’s in My Record?

Patients can use health information features in Connect to view and update much of the information in their Medical record at your organization, including:

- Current health issues
- Medications
- Test results
- Allergies
- Immunizations
- Medical history
- Preventive care reminders

Patients also have access to a wide variety of health tools:

- **Patient-Entered Flowsheets.** Document details about day-to-day health. Through device integration, personal fitness trackers can automatically populate the flowsheets.
- **Health Trends.** Graph vital signs and lab results over time.
- **Growth Charts.** Track children’s growth and compare to others in their age groups.
- **End-of-Life Planning.** Manage designated health care agents and upload documents, such as advance directives and a living will.
- **Questionnaires.** Provide general and family history information, history of present illness, and other self-reported outcomes.

Proxy Access

Your organization can give proxy access to parents, spouses, or caregivers so that they can view a patient’s Connect and Lucy accounts. You can set a proxy’s access to expire on a specific date or choose to grant only a restricted set of features to some proxies, such as the parents of teenage patients.

Insurance and Billing

Connect shows details of patients’ insurance plans, such as coverages and copays, and account information, such as individual statements. Patients can set up their own payment plans, choose paperless billing, and use a credit card to pay bills, copays, and prescription refill charges through Connect.
Sign up for a Connect account

To sign up for Connect, you must be at least 12 years old. There are several different methods of Connect signup that might be used by different departments across the organization:

- Clinic staff might sign you up directly while you're at the front desk or in the exam room.
- You might receive a Connect activation code on your After Visit Summary.
- You might be able to complete a paper form to request an activation code, after which you'll receive a letter in the mail with an activation code.
- You might be able to use self-signup online to create a Connect account by matching your information against what is on file in your medical record or with third-party identity verification.

Self-sign up for Connect

If you don't have an activation code, you can complete a paper form to request one or request one online. To request an activation code online:

1. On the Connect login page, click **Sign Up Now** in the New User? Section.

2. **No Activation code?** See the right side of the screen, select **Self Sign Up**

3. Complete the information to register for a **Connect** account.

Sign up from Email link

1. From email select the link to begin the sign up process, click **Sign Up Now** in the New User? section.
2. Enter your activation code and other personal verification items, such as the last four digits of your Social Security number and your date of birth. Click Next.

3. On the next page, choose the following:
   
   - **Connect username.** This should be something that others wouldn't be likely to guess but easy for you to remember. It cannot be changed at any time.
   
   - **Password.** This should be a unique combination of numbers and letters, using both uppercase and lowercase letters. Your password must be **at least eight characters** and must be different from your Connect username. Choose a password that you don't use for other websites.
   
   - **Security question.** This question will be used to verify your identity if you forget your Connect password. Choose a security question from the list and enter your answer. Your answer cannot include your Connect password.
   
4. On the next page, choose whether you want to receive a notification message in your personal email when there is new information available in your Connect account. If you opt to receive email alerts, enter your email address.

Log in to Connect

1. In your web browser, enter [www.myconnectnyc.org](http://www.myconnectnyc.org) or ([www.myconnectnyc.org/newuser](http://www.myconnectnyc.org/newuser) for self sign-up) and access the login page.
2. Enter your Connect username and password, and click Sign In.

What if I forget my Connect ID or password?

Click the link below the login or password field for assistance. You will be prompted to answer some security questions to verify your identity.
View or download your medical record

You can save your health summary to a USB drive to carry with you in case of emergency. The portable summary includes all of the allergies, medications, current health issues, procedures, test results, and immunizations you can see in Connect. If necessary, the information on your USB drive can be uploaded into a personal health record or another healthcare organization’s electronic health record.

1. Go to Health > Document Center.

2. Click Visit Records and select the Lucy Summary tab.
3. Click Download and then click Request for the message that appears. You'll be notified when your download is ready.
4. When you are prompted to save or open the file, click Save and save it to an accessible location on your computer.
5. Open the folder and extract the .zip file.
6. To view your medical record, open the PDF file in the folder.

View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.

1. Go to Health > Document Center and click Visit Records.
2. Select a visit on the Single Visit tab or use the Date Range tab or All Visits tab to select multiple visits. Then:
   - Click View to view a copy of the visit summary.
   - Click Download to save a copy of the visit summary for your records.
   - Click Send to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.
Share your medical information with someone else

Share Everywhere is a way for you to share your medical information with the people who are taking care of you. Using your Connect or Connect mobile account, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a note back to your health system to help keep your care team informed of the care they provided.

1. Go to the Share My Record activity.

   - On the Connect mobile app, it’s accessible from the home screen after you’ve logged in. Note that you must update the Connect mobile app to version 5.4 or higher to use Share Everywhere.

2. Enter the name of the person who will be viewing your record and request the share code.
3. Tell that person to go to www.shareeverywhere.com to enter the code along with your date of birth.

View messages from your clinic

You can read any messages sent by your doctor or other clinic staff by going to your Inbox (Messaging > Message Center).

If you’re looking for a specific message, enter key words in the search field on the Inbox page.

Receive email or text messages when new Connect messages are available

1. Go to Profile > Communications.
2. Expand the Messages section and select a communications option.
3. Update your email address and mobile phone number if needed at the bottom of the page.
Ask your doctor for medical advice

If you have a non-urgent medical question, you can send a message to your doctor's staff members. This message is secure, meaning your information stays private as it is sent over the Internet.

You might use the Get Medical Advice feature if you're not sure whether you should come in for an appointment, if you need clarification on the dosage of one of your medications or something that was discussed in a recent visit, or if you just want advice about a common illness.

1. Go to Messaging > Ask a Question.
2. Click New Medical Question.
3. Select a recipient from the list. This list might include your primary care provider, another doctor with whom you've recently had an office visit, or the general nursing staff at the clinic.
4. Select a subject for your message and enter your question.
5. When you are finished, click Send.

Someone at your clinic should respond to you two days ago. If you've opted to receive email or text notification for new messages in your Connect account, you'll receive a message letting you know that the clinic has responded to your request.

To view a message after you've sent it, go to Messaging > Message Center and select the Sent Messages tab. Messages that appear in bold text have not yet been read by clinic staff.

Request a referral to see another provider

1. Go to Messaging > Request a Referral.
2. Enter the provider you want to see, a reason for the referral, and a brief message explaining your request.
3. When you are finished, click Send.

Someone at your clinic should respond to you two business days ago. If you've opted to receive email or text notification for new messages in your Connect account, you'll receive a message letting you know that the clinic has responded to your request.

To view a message after you've sent it, go to Messaging > Message Center and select the Sent Messages tab. Messages that appear in bold text have not yet been read by clinic staff.
View your past or upcoming appointments

You can view your past or future appointments by going to Visits > Appointments and Visits.

Select a scheduled future appointment or click Details to see info such as:

- The date, time, and location of the visit
- Any pre-visit instructions from the clinic
- Directions to your clinic

If an upcoming appointment is eligible for eCheck-in, you can use it to take care of tasks such as the following before you arrive at the clinic:

- Pay visit copays
- Pay pre-payments and balance payments
- Verify or update insurance and demographics information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires
- Verify guarantor information

Select a past appointment to view the After Visit Summary. You can also view any of your doctor’s visit notes that are shared with you by selecting the Notes tab.
Request or schedule an appointment

To request or schedule an appointment, go to Visits > Schedule an Appointment. Depending on the reason for scheduling or type of appointment you choose, you'll be directed to the Request an Appointment or Schedule an Appointment page.

- When you send an appointment request, you're asked to enter the provider you want to see, the reason for the visit, preferred dates and times, and any comments regarding why you are requesting the appointment. After you submit your request, someone from the clinic will contact you to verify an appointment date and time.
- When you schedule an appointment, you schedule the appointment yourself and don't need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can choose a location and enter preferred dates and times. Pick an appointment from the list of available time slots to schedule it.

View/Print AVS (After Visit Summary) for past visits

To view or print an AVE (After Visit Summary) from a past visit, go to Visits > Appointments and Schedules. Locate the visit you would like to view the AVS for, Select View After Visit Summary.

Request or schedule an appointment

To request or schedule an appointment, go to Visits > Schedule an Appointment. Depending on the reason for scheduling or type of appointment you choose, you'll be directed to the Request an Appointment or Schedule an Appointment page.

- When you send an appointment request, you're asked to enter the provider you want to see, the reason for the visit, preferred dates and times, and any comments regarding why you are requesting the appointment. After you submit your request, someone from the clinic will contact you to verify an appointment date and time.

When you schedule an appointment, you schedule the appointment yourself and don't need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can
Cancel an appointment

Depending on the date and time of your next appointment, you might be able to cancel it through Connect. **If it is too close to your appointment date or time, you'll need to call the clinic to cancel your appointment.**

1. Go to **Visits > Appointments and Visits**, and select the appointment from the list or click **Details**.
2. Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.

View your test results

With Connect, you can view test results as soon as they become available, rather than waiting for a phone call or letter from your physician. To view test results, go to **Health > Test Results**. Select a test to see more information about it, such as:

- The standard range for the result.
- Any additional comments your provider entered about the result.

Manage your medications

View your current medications

Go to **Health > Medications** to see all of your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the physician who prescribed the medication. You can view additional information about a medication, such as precautions to consider when taking the medication and potential side effects, by clicking the **Learn more** link.

- Remove a medication you're no longer taking by clicking **Remove**.
- Add a new medication by clicking **Add a Medication**.

Request a medication refill

1. From the medication list, click **Request Refills**.
2. Select the check box next to the medication you need refilled and enter any comments. Click **Next**.
3. Select a delivery method, pharmacy, and pickup date and time that's convenient for you, if applicable. Click **Next**.
4. Review the details of your refill request and click **Submit**.

You will receive a message in your Connect Inbox when your prescription refill is processed.
View a summary of your health information

To get a summary of your medical record, go to Health > Health Summary. This summary includes:

- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care topics

Respond to questionnaires from your clinic

Your clinic might make questionnaires available from Connect so you can complete them online instead of filling out a form when you get to the clinic.

You might be able to respond to questionnaires in three different places:

- Open generally available questionnaires from Health > Questionnaires.
- If your doctor wants you to complete a questionnaire for an upcoming appointment, go to Visits > Appointments and Visits. Select the upcoming appointment and click Details. Open the questionnaire by clicking its name in the Questionnaires section of the appointment details.
- If your doctor sends you a Connect message with an attached questionnaire, open it by clicking the questionnaire link near the top of the message.

If you need to close a questionnaire before you finish it, click Finish Later to save your progress.
Proxy Access

Proxy access can be given to parents, spouses, or caregivers so that they can view a patient’s Connect and Lucy accounts. You can set a proxy’s access to expire on a specific date or choose to grant only a restricted set of features to some proxies, such as the parents of teenage patients.

Family Access

If you have access to your family members' medical records, you can view most of the information in their records in the same way that you view your own. Some things that might be particularly useful include:

- Viewing or printing your child's immunization record
- Viewing your child's growth charts
- Viewing a family member's test results

If you're a parent, you can have full access to your child's record through a designated age (check with your clinic) and limited access through age 18. This section explains how to access a family member's record and how to access growth charts and immunizations in a child's record.

Access a family member's record

After you've received permission, you can view a family member's records by clicking the photo or name for that family member in Connect.

After you read the proxy access disclaimer, click Accept to continue to your family member's chart.

You can customize how the names and photos appear for each family member. For more information, refer to Personalize Connect.
Children 0-11

Parents or caregivers will have full access to the features in Connect for their proxies:

- Account details
- Account payments
- View/Edit Personal Information
- Alerts
- Appointment Details and Cancellations
- Appointment Scheduling, Recent Appointments and Upcoming Appointment List
- Medical Histories (includes Family History, Sexual Activity History, Social History, Surgical History)
- Health Issues and Health Reminders
- Immunizations
- Allergies
- Labs and Lab Results
- Medications and Medication Refills
- Patient Preferences
- Provider Search
- Recent Visits List and Recent Visits Summary
- Referral Review
- History Questionnaires
- Patient-Entered Flowsheets and Questionnaires
- View Scans
- File Attachments
- My Conditions
- My Documents
- Preferred Pharmacy
- eSign Documents
- Health Plan Changes
- Health Reminders

Adolescent

Parents or caregivers will have limited access to the following features in Connect for their proxies:

- Account details
- Account payments
- Appointment Schedule Requests
- Family History
- Immunizations
- Allergies
- Referral Review
- Patient-Entered Questionnaires
- File Attachments
- Preferred Pharmacy
Adult

Children or caregivers will have access to the following features in Connect for their proxies:

- Account details
- Account payments
- View/Edit Personal Information
- Alerts
- Appointment Details and Cancellations
- Appointment Scheduling, Recent Appointments and Upcoming Appointment List
- Medical Histories (includes Family History, Sexual Activity History, Social History, Surgical History)
- Health Issues, Health Reminders, and Health Maintenance
- Immunizations
- Allergies
- Labs and Lab Results
- Medications and Medication Refills
- Patient Preferences
- Provider Search
- Recent Visits List and Recent Visits Summary
- Referral Review
- History Questionnaires
- Patient-Entered Flowsheets and Questionnaires
- View Scans
- File Attachments
- My Conditions
- My Documents
- Preferred Pharmacy
- eSign Documents
- Health Plan Changes
- Health Reminders
- Upcoming Preadmissions

View your outstanding balance

To see the outstanding account balance for any of your accounts, go to Billing > Account Summary. To view additional information about an account, including past statements, click the View account details link.

Make a payment for an outstanding account balance

2. Click Pay Now for the account on which you want to make a payment.
3. Enter the amount to pay along with your credit card or bank account information. Click Continue.
4. Review your payment information and click Submit Payment.
Sign up for paperless billing

1. From the Billing Account Summary page, click the paperless billing alert.
2. If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number and select the corresponding check box to receive notifications.
3. Select the I understand that I will no longer receive statements in the mail check box and click Sign Me Up.

View claims for services covered by insurance

1. Go to Billing > Coverage Details.
2. Select a coverage and click the Claims tab.
3. Select a claim to view details for it, such as the servicing provider and claim status.

If you have a question regarding the claim, click Customer Service Request to send a message to customer service staff.

Review and update your insurance information

To review the insurance information your clinic has on file, go to Billing > Insurance Summary. Click Details for the payor or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.

To update your insurance information, make any of the following changes:

- Request a change to an existing coverage.
- Remove a coverage.
- Add a new coverage. New coverages are submitted for verification when you log out of Connect.
Personalize Connect

There are three ways you can personalize how Connect appears for you and each of your family members. For each account you have access to, you can:

- Specify the color scheme.
- Change the name that appears under that person's photo.
- Add or change the photo. Note that photos you upload through Connect are visible to medical staff, so you should only use a photo that shows each person's face.

1. Go to Profile > Personalize.
2. Click Edit.
3. Make any of the changes described above and then click Save.
Update your personal information

You can update your address, phone number, email address, and other personal details at any time so that your clinic always has the most up-to-date information in your record.

1. Go to Profile > Personal Information.
2. Click Edit in the section for the information you need to update.
3. Confirm that your updated information is correct, and then click Save Changes.

Customize your notification preferences

Connect can send you notification by email or text message when there is new information available in your Connect account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

1. Go to Profile > Communications.
2. Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive.
3. Update your email address and mobile phone number if needed.
Change your Connect password or update your security question and answer

To ensure that your medical information stays protected, consider changing your Connect password periodically. To do so, go to Profile > Security Settings. From this page, you can also update the security question and answer that are used when you forget your Connect username or password.