Quick Reference Guide: Manage PHR Users

This guide provides instructions for how to Add, Edit, Activate, Deactivate, and reset passwords for Patient Health Record (PHR) Portal users. All PHR functions are performed inside the PHR section of the patient chart.

A PHR user's username and password provide access to a single patient's PHR Portal. If an individual needs access to the PHR Portal for multiple patients within your practice account, (e.g., for himself and his mother), he will need two separate PHR usernames and passwords.

Before you begin: You must have both the "Access PHR Patient Chart Section" and "Manage PHR Users" permissions to perform the procedures in this Guide.

Create New PHR User

1. Open the patient chart.

2. Click the PHR tool at the bottom of the left vertical tool bar.

3. Click the Manage PHR Users button to open the Manage PHR Users popup.

4. Click the Add PHR User button to open the Add PHR User popup.

5. Complete all required fields on the Add PHR
   User popup. Required fields are marked with *
   - If you are creating the first PHR user for this
     chart, all the Demographics information for
     the patient will prefill.
   - If you are adding a PHR user account for
     a patient representative, select
     Family or Other in the Relationship field.
     Use the Note field to provide additional
     information about this PHR user for this
     patient chart. The note is optional.
   - The generated username is the user's "first initial"
     followed by "lastname" followed by "account/practice
     name" followed by a number to prevent duplicates,
e.g.,
     AJONESCCAFP for Andrew Jones at CCAFP
     JSMITHCCA4 for John Smith at CCA (4th JSMITH at CCA)
     MHARCCA for Marcia Har at CCA

6. Click the Save button.
    - Popup closes.
    - New PHR user is added to the list.
    - PHR user account is activated.
    - PHR user is assigned a temporary password
      which is valid for 72 hours.
    - PHR user is sent an email with username
      and temporary password.

Edit User

1. In the PHR section of the patient chart, click the Manage PHR Users button. **Manage PHR Users**

2. Click the pencil icon ✎ in line with the PHR user you want to edit. The Edit PHR User popup opens (It looks like the Add PHR User popup on previous page).
3. Make the necessary changes.
   - Changes to name fields will not change the username. Username cannot be changed.
4. Click Save. All changes are reflected in the list of PHR Users.

Manage PHR Users for Nadiv Har

Add PHR User

Name	Username	Relationship	Email Address	Note			
Nadiv Har	NHARCCA	Patient	cindy.putorti@lillegroup.com		✎	🔒	Deactivate
Falling Leaves	FLEAVESCCA	Family	cindy.putorti@lillegroup.com		✎	🔒	Activate
Mark Har	MHARCCA	Family	mhar123!@aol.com	Mark is Nadiv's brother	✎	🔒	Deactivate

Activate/Deactivate PHR User

- This button is a toggle. The label displays the action that can be performed.
- PHR users are automatically Activated when they are created.
- Deactivated PHR users cannot log in to the PHR portal for this patient chart.
- Deactivated PHR users are shown with a grey background on the list of PHR Users and display the Activate button.
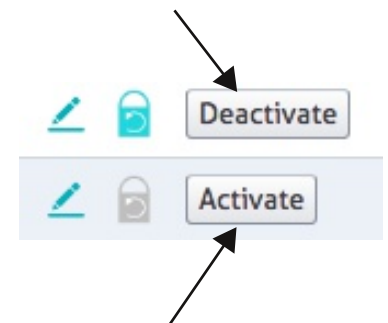
1. From the PHR section of the patient chart, click the Manage PHR Users button.
2. Click the Deactivate button to prevent that user from accessing the PHR portal for this patient chart.
3. Click the Activate button to allow that user to access the PHR portal for this patient chart.

Reset and Send Password

1. From the PHR section of the patient chart, click the Manage PHR Users button.
2. Click the lock icon to open the Reset Password and Send Email popup. (If the lock is disabled, it means the user is not active).
3. Confirm that the email shown in the popup is the correct email address for this user. (If it is wrong, click Cancel and then edit the PHR user to record the correct email address).
4. Click Reset and Send. User will receive an email with username and temporary password which is valid for 72 hours.

Reset Password and Send Email

Click Reset and Send to generate a new password for this user and send an email to cindy.putorti@lillegroup.com to notify the user.

Cancel   Reset and Send