



Product Brief

# Patient Portal

All online interactions flow seamlessly into ClinicTracker EHR

**Make it easy for your clients to fill forms, schedule appointments, attend telehealth sessions, and pay bills online.**



## Patient Portal: Overview

Many of your clients have come to expect online access to their medical records, scheduled appointments, and financial information. That's how the patient-practice relationship has evolved in recent years (with ample encouragement from the government via HIPAA and the Meaningful Use program).

ClinicTracker's Patient Portal is designed to make it easy for your clients to interact with you and your agency securely over the web. When clients log into their portal, they have 24/7 access to information they can use to facilitate their treatment. They will also feel more connected with your agency. While improving patient engagement, you are simultaneously reducing routine phone calls, lowering your no-show rate, and improving your collections.

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**Enable patients to register demographic information & schedule their first appointment online.**

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Through the portal, patients can:

- Register as a new patient and complete a registration packet your agency defines
- Review/edit demographic and insurance information
- Access significant parts of their medical chart, including appointment history, medication lists, allergy information, and lab results
- Schedule an appointment
- View, confirm, or cancel upcoming appointments
- Attend [telehealth](#) appointments
- Complete forms your staff requests
- See the balance due, including insurance and patient responsibility
- Pay their bills online with a credit card (and print/email a receipt)
- Send messages to members of their treatment team or support staff
- Take advantage of [educational resources](#) clinicians can post
- Generate a [portable medical record](#) to view, download, or distribute

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**Patients can attend telehealth appointments via the Patient Portal.**

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### **New Patient Registration**

A Patient Portal embedded in an agency's home page presents a rich opportunity to market clinical services and engage potential clients efficiently. By enabling them to register demographic information and schedule their first appointment online, you've made it simple for patients to connect with your services at any time. Patients who have stigmas about disclosing their health condition verbally or handwritten to your staff will benefit from the added privacy of the Patient Portal. You've also made it easier to enter required information in a way that's guaranteed to provide legible data that flows directly into ClinicTracker EHR. Before the client arrives for that first appointment, you've got everything necessary to proceed with the intake – even insurance eligibility verification.

### **Scheduling**

Because patients can see available openings in real time, they can make choices based on location, clinician, service, date, and time. Scheduling across time zones is possible too.



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**Give clients reasonable control over their clinical experience while cutting down on phone calls and missed appointments.**

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Once the patient selects their preferred slot, the system automatically sends notifications to the clinician and appropriate members of your scheduling team. The patient will also receive an email confirmation. Patients can confirm or cancel upcoming appointments, search for new appointment availability, and choose to receive appointment reminders by phone or text message. Online scheduling allows patients to feel connected to your office, while eliminating unnecessary phone calls with your staff.

### **Form Completion**

Clients can complete forms, tests, rating scales, and surveys whenever your staff requests. You simply send the patient a notification using the Secure Messaging system. When patients log into the portal, they will see a list of forms to complete, along with your notes and instructions. Clicking a link brings them to the form which they can then complete, revise, save, and submit (even with a digital signature). The information they provide goes directly into their patient record in ClinicTracker. The system also notifies the appropriate staff members when the data arrive.

What's unique about ClinicTracker's Patient Portal is that it can transmit forms that you can build using our powerful Form Builder utility. That means you devise just about any form you want for clients to complete via the web. Staff and administrators love that they can create a whole new world of possibilities for data gathering, tracking, and patient engagement – all seamlessly integrated into the ClinicTracker platform.

### **Online Bill Pay**

ClinicTracker's built-in **credit card processing** significantly streamlines payment collections. Online Bill Pay takes it one step farther by allowing patients to pay their invoices online without any staff intervention. Clients appreciate this feature because it's private, convenient, and easy to follow. Here's how the process works:



1. Log into the Patient Portal and click the My Account link
2. Review account status (including aging and insurer balances)
3. Press the Pay My Bill Online button
4. Choose which invoices to pay, either in full or in part
5. Enter credit card information and press the Submit button

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**Boost client engagement  
with modern client-office  
communication.**

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The system will send an email receipt to the client (or authorized representative) and notify designated office staff. The payment is recorded immediately in both the Patient Portal (where the patient can view it or generate a receipt) as well as within BillingTracker. The process is completely automated.

### **Communication**

Boost client engagement with modern client-office communication. Your patients can send and receive HIPAA-secure messages while interacting with their treatment team. When a new message arrives, the patient will be notified by email that it's available on their portal account. For the staff's convenience, messages from both patients and colleagues are organized in the Unified Messaging System within ClinicTracker. Composing a message to a patient is simple, with no email addresses to remember or complex security procedures involved. The system will also let you coordinate communications with a patient's authorized representatives.

### **Agency Branding**

The Patient Portal also will improve your agency's branding. Clients will appreciate your dedication to making their lives easier and empowering them to take a degree of stewardship over their treatment experience. You can even style the portal with your own logo, color scheme, and contact information. It's a tangible way of upgrading your approach to client engagement.

**Contact us for a live demo to see the Patient Portal in action.**