

MyChart Patient Quick Start Guide

MyChart provides you with online access to your medical record. It can help you participate in your healthcare and communicate with your providers.

From MyChart, you can:

- Review summaries of your previous appointments, including issues addressed during each visit, your vital signs, and tests or referrals that were ordered.
- View your medications, including dosage information and instructions, and request a refill.
- View new lab results, as well as trends over time. For example, view results for your past cholesterol tests on a graph to see if you're close to meeting your target number.
- Access your family members' medical records. For example, you can view your child's growth charts, immunization history, and upcoming appointments.

This guide provides an overview of many of MyChart's features and how to use them.

Sign up for a MyChart account

To sign up for MyChart, you must be at least 13 years old. There are several different methods of MyChart 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 MyChart activation code on your After Visit Summary.
- You might be able to use self-signup online to create a MyChart account by matching your information against what is on file in your medical record.

Request an activation code if you don't already have one

If you don't have an activation code, you can request one online. To request an activation code online:

- On the MyChart login page, click **Sign Up Now** in the New User? section.
- Click **Sign Up Online**.
- Complete the form and have an activation code sent to your email address or mailed to you.

Use your activation code to sign up

- From the MyChart login page, click **Sign Up Now** in the New User? section.
- 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**.
- On the next page, choose the following:
 - **MyChart 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 MyChart username. Choose a password that you don't use for other websites.
- 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 MyChart account. If you opt to receive email alerts, enter your email address.

Log In to MyChart

- In your web browser, enter <https://mychart.middlesexhealth.org> and access the login page.
- Enter your MyChart username and password, and click **Sign In**.

What if I forget my MyChart ID or password?

Click the link below the login or password field for assistance. You will send either by email or text message a Two Factor Authentication code to verify your identity. If you are still having trouble logging in, visit our Middlesex Health MyChart page and click "Request Support".

Medical Record Access and Sharing

Epic offers several different features through the MyChart patient portal to allow you to access your health records.

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 MyChart. If necessary, the information on your USB drive can be uploaded into a personal health record or another healthcare organization's electronic health record.

- Go to **Health > Document Center**.
- Click **Visit Records** and select the **Lucy Summary** tab.
- Click **Download** and then click **Request** for the message that appears. You'll be notified when your download is ready.
- When you are prompted to save or open the file, click **Save** and save it to an accessible location on your computer.
- Open the folder and extract the .zip file.
- 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.

- Go to **Health > Document Center** and click **Visit Records**.
- 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.

Download medical records you've requested

If you've requested a copy of your medical record from Middlesex Health, you can download and view it from MyChart, rather than having to wait for a paper copy to arrive in the mail. Your organization might also provide a link where you can complete a form to request medical records from this feature.

- Go to **Health > Document Center** and click **Requested Records**.
- Locate the record you want to view and click **Download**.
- If the record is password protected, you see a message to warn you. Click **Continue Download**.
- Click **Save** to save the file to your computer and then open it, or click **Open** to open it without saving it to your computer.
- If the record is password protected, click **Show Password** on the Requested Records page to view the password you need to access the document and enter it to view the document.

Authorize sharing of your medical records

Occasionally, you might need to see a doctor outside of your normal healthcare organization (for example, if you seek emergency treatment while traveling or see an outside specialist). To help ensure that your medical records are accessible in these scenarios, you can authorize the sharing of your records in MyChart. When you authorize sharing ahead of time, you don't need to sign a paper authorization form if you are admitted or seen at an outside organization.

- Go to **Profile > Authorize Sharing**.
- Under Authorize Access, select the organizations with whom you want to share your medical records.
 - Click **All organizations** to make your records generally available.
 - Click **Preferred organizations** to select specific organizations.
- Click **Continue**.
- Review the authorization form and click **Authorize**.

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 MyChart or MyChart 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.

- Go to the Share My Record activity.
 - On the MyChart website, it's accessible under the **Health > Medical Tools** menu.
 - On the MyChart mobile app, it's accessible from the home screen after you've logged in. Note that you must update the MyChart mobile app to version 5.4 or higher to use Share Everywhere.
- Enter the name of the person who will be viewing your record and request the share code.
- Tell that person to go to www.shareeverywhere.com to enter the code along with your date of birth.

Messaging

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**).

Receive email or text messages when new MyChart messages are available

- Go to **Profile > Notifications**.
- Expand the Messages section and select a notification option.
- 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.

- Go to **Messaging > Ask a Question**.
- Click **New Medical Question**.
- 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.
- Select a subject for your message and enter your question.
- When you are finished, click **Send**.

If you've opted to receive email or text notification for new messages in your MyChart account, you'll receive a message letting you know that the clinic has responded to your request.

The newly updated MyChart Message center allows you to:

- View conversation threads in sequential order.
- Bookmark conversations for fast future access.
- Search for messages by keyword.
- Quickly spot questionnaires or scheduling tasks they need to complete.
- Include attachments in messages to customer service staff.

Request a referral to see another provider

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

If you've opted to receive email or text notification for new messages in your MyChart account, you'll receive a message letting you know that the clinic has responded to your request.

Visits

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

eCheck-in available for some appointments:

For some of your appointments you will have the ability to eCheck-in through your MyChart app. The newly updated design adjusts workflow of the check in process depending on the device you are using.

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
- Verify or update insurance and demographics information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires

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.

Cancel an appointment

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

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

Health

View your test results

With MyChart, 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.

Receive email or text messages when new results are available

- Go to **Profile > Notifications**.
- Expand the Health section and select a notification option next to Test Result.
- Update your email address and mobile phone number if needed at the bottom of the page.

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.

Request a medication refill

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

You will receive a message in your MyChart 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 (including Lot#, Manufacturer and more)
- Preventive care topics

COVID-19 information:

- To be more aware of the COVID-19 activity you can view the new cards on the health feed in MyChart.
- You can see more information about your COVID-19 vaccinations such as the manufacturer and location where the vaccine was given

- You can see test results and vaccinations from external organizations in the status activity
- You can download your vaccine information to a PDF if you need to present your vaccination details

How to access Immunization Records on your MyChart Account

1. Click on the **MyChart icon** on your mobile device
2. On your opening page under **Activities** header click on the **Health Summary**
3. At the Bottom, click on the **Immunizations** icon to see your immunizations

How to Add Middlesex Health to your Existing MyChart Account

1. Click on the **MyChart** icon on your mobile device
2. On your opening page, on the top right in blue, click on the **three white dots**
3. In the dropdown menu click **Switch organizations**
4. A window will appear with organization choices. Click on **Middlesex Health**
5. On the Middlesex Health page type in your **Password** and click **Log in**

Respond to questionnaires from your clinic

Your clinic might make questionnaires available from MyChart 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 MyChart 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.

26Track your daily health readings online

Your physician might request that you record information such as your daily glucose or blood pressure readings in MyChart. When you enter the information in the Track My Health feature, your physician automatically receives the readings so he can monitor your progress between visits.

Record a new reading in Track My Health

- Go to **Messaging > Message Center**. Open the message from your physician about a new flowsheet. The flowsheet is what you use to enter your readings in the Track My Health feature.
- Open Track My Health by clicking the link in the message.
 - In the future, you can record your readings by going directly to **Health > Track My Health**.

- Click the flowsheet's name to open it, and then click **Add New Data** to start recording your readings.
- Enter your reading with the date and time and click **Continue**.
- Verify that you have entered your reading correctly and click **Submit**.
- If you need to change or remove a reading after you've submitted it, you can do so by clicking **edit** or **delete**.

Track your readings over time in a table or graph

- On the Track My Health page, click a flowsheet's name to view previous readings in a table.
- From this page, you can:
 - Change the orientation of the table. Click the **More Options** link to choose whether dates appear as rows or columns.
 - View the readings in a graph. Click **Graph** to change the display.
 - Customize the date range or the number of readings that appear. Change the **From** and **to** fields or the **latest values** field and click **Apply** to update the display.

Family Access (Proxy 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 age 13, 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.

Requesting Proxy Access

There are two ways you can complete the necessary forms required before proxy access is granted.

- Ask for the Proxy Request Form the next time you are at your doctor's office. There is a form for having proxy access to an adult, as well as a form for a parent accessing their child. Once these forms are completed, our HIM department at Middlesex Health will complete the necessary processing for proxy access.
- If you are a patient of Middlesex Health and already have a MyChart account:
 - Log in to your MyChart account
 - Hover over **Messaging** > select either the **Grant Adult Access** or the **Request Minor Access form**.
 - Our HIM department will receive these requests electronically and complete the necessary processing for proxy access.

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 MyChart.

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

View and print your child's immunization record

When you are in your child's record in MyChart, go to **Health > Immunizations**. You can see the immunizations your child has received and the dates on which she received them. Click the immunization name to learn more.

To open a printer-friendly summary of your child's immunizations, click .

View your child's growth charts

To view your child's growth charts, open your child's record and go to **Health > Growth Charts**.

You can customize the view of the growth chart by:

- Choosing a different Chart Set. For example, you can switch between growth charts provided by the Center for Disease Control (CDC) and the World Health Organization (WHO).
- Changing the Chart Type. For example, you can switch the view from length-for-age to weight-for-age or Body Mass Index-for-age.

You can also view the growth chart with a different unit of measure (metric or standard) by selecting the option for that unit of measure.

If you want a copy of the growth chart for your records, click .

Billing and Insurance

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

- Go to **Billing > Account Summary**.
- Click **Pay Now** for the account on which you want to make a payment.
- Enter the amount to pay along with your credit card or bank account information. Click **Continue**.
- Review your payment information and click **Submit Payment**.

Sign up for paperless billing

- From the Billing Account Summary page, click the paperless billing alert.
- 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.
- 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

- Go to **Billing > Coverage Details**.
- Select a coverage and click the **Claims** tab.
- 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 MyChart.

Preferences and Administrative Features

Personalize MyChart

There are three ways you can personalize how MyChart 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 MyChart are visible to medical staff, so you should only use a photo that shows each person's face.
- Go to **Profile > Personalize**.
- Click **Edit**.

- 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.

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

Customize your notification preferences

MyChart can send you notification by email or text message when there is new information available in your MyChart 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.

- Go to **Profile > Notifications**.
- 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.
- Update your email address and mobile phone number if needed.
- You can reduce the number of new test result notifications by signing up for the Test Results Daily Digest in the communication preferences section.

Change your MyChart password or update your security question and answer

To ensure that your medical information stays protected, consider changing your MyChart 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 MyChart username or password.

Mobile Apps

MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the MyChart website, allowing you to do all of the following, and more!

- View test results.
- Send and receive messages.
- Schedule and confirm upcoming appointments and view visit summaries for past appointments.
- View your health summary, including allergies, immunizations, current health issues, and medications.
- View preventive care procedures and when they are due.
- Request and pay for medication refills.
- View billing statements and pay balances due and visit copays.
- Access family members' charts.

If you have an iOS device, you can pair it with Apple Watch™. With MyChart for Apple Watch, you can:

- See alerts for new information in MyChart.
- View upcoming appointments.
- Read messages.
- Review their medication list.

Download the MyChart app

To install the MyChart app, go to the App Store or Google Play Store and search for "MyChart."

Connect your MyChart account to Apple Health or Google Fit

If your doctor has assigned you a patient-entered flowsheet for tracking your health data, you can connect MyChart to Apple Health or Google Fit to automatically pull in data from other health and fitness apps or devices.

- In the MyChart mobile app, open the Track My Health activity.
- Tap **Connect to Health** or **Connect to Google Fit** at the bottom of the screen.
- Tap **Connect to "Health"** or **Connect to "Google Fit"**.
- Choose the data you want to share with MyChart by tapping the toggle button for each type of data.
- Tap **Done**. At this point, any data that was already stored in Health or Google Fit is automatically synced to MyChart.

Additional MyChart information: YouTube Videos

- [The New MyChart Experience \(Mobile\)](#)
- [The New MyChart Experience \(Web\)](#)
- [MyChart: Connecting Accounts \(Mobile\)](#)
- [MyChart: Connecting Accounts \(Web\)](#)
- [MyChart: Sharing Your Record \(Mobile\)](#)
- [MyChart: Sharing Your Record \(Web\)](#)
- [Proxy Access \(Mobile\)](#)
- [Proxy Access \(Web\)](#)
- [Your Health Record on the Go](#)
- [The New MyChart Experience for Desktop](#)

