

MYLE – USER GUIDE

MEDFAR
SOLUTIONS CLINIQUES



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Introduction

The patient portal is a website where patients can connect and obtain messages, documents, invoices, as well as appointments online . This site is directly linked to your MYLE environment. Each environment has its own portal. Primarily, the patient portal is empty. Items found in it will be those that the clinic decides to share.

Account Management

The first functionality to get to know is account management. How to know if someone has a portal? How to invite someone to the portal? How to manage a child's portal if the parent wants to have access to it? All these answers are found in explanations of functions below:

Creating Portal Accounts

This section explains how to create a portal account and link it to the patient file. The following two options are available to you for portal account creation. You can pick one in particular, or use them both in parallel, according to your needs.

Please refer to the available video by clicking [here](#) to understand each method in detail.

1. Sending the invitation from the patient file using the portal icon

- Note that this method permits the association of the portal account and the patient file automatically once the patient activates their account.

(Mr.) Hébert, Charles Health Card HEB99052908 (2020 / 04) File Numbers N1000593 Date of Birth 1999/05/29 (20y 10m) @charles.hebert@test.com (Personal) Info Ramq N/A N/A

Search New Note [+] Criteria

ACTIVE PROBLEMS > ACTIVE MEDICATION >

MEDICAL HISTORY > ALLERGIES AND INTOLERANCES >

SURGICAL HISTORY > SOCIAL HABITS >

PSYCHIATRIC HISTORY > ALERTS AND SPECIAL NEEDS >

OBSTETRICAL HISTORY > IMMUNIZATIONS >

BP(Sitting):-- W:-- H:-- BMI:-- WC:-- CRcl:-- O₂ Sat:-- T:-- VITAL SIGNS --

Portal Registration

Personal charles.hebert@test.com

Other

Type

Courriel

Close Refuse **Send**

2. Creation of the portal account by the patient directly through your clinic's portal website.

- Note that this method does not automatically associate the portal account and the patient file. See the explanatory video to learn how to link the two together.

Clinique Démo
((11) 123-4567)

FRANÇAIS ESPAÑOL LOGIN

Email

Password

Forgot your password?

New Patient?

New to the portal and need help?

Clinique Démo
((11) 123-4567)

FRANÇAIS ESPAÑOL LOGIN

Register

Email *

Confirm Email *

Password *

Confirm Password *

First Name *

Last Name *

Medicare Number RAMQ

Date of Birth * mm/dd/yyyy

Gender * Male Female Unspecified / Other

Primary Telephone * (204) 234-5678 Mobile

Secondary Telephone (204) 234-5678 Home

Deleting and Locking a Portal Account

Account deletion consists of removing patient access to their portal. The deletion of the account is permanent, although locking can be temporary.

1. Click **Delete Account** in the section **Account : Details** to delete it.
 - a. A new window opens.

(Mr.) Smith, John ♂
Health Card SMJ85022306 (2025 / 01)
File Numbers N001000048
Date of Birth 1985/02/23 (35y 1m)

+1 (555) 555-9990 (Personal - Phone)
1224, Stanley Street, Montreal, Quebec
Canada
@johnnysmithmt85@gmail.com (Personal)

Dr. Charles Lee
N/A
N/A

Demographics Identifiers Contacts Clinicians Other Relationships Enrollment DSQ Portal

Recent Activity

- 2019-11-10 @11:41:07 AM New Document
- 2019-10-15 @22:44:01 PM Appointment Booked
- 2019-09-16 @21:12:01 PM Appointment Booked
- 2019-09-09 @22:32:00 PM Appointment Booked
- 2019-09-02 @21:56:01 PM Appointment Booked
- 2019-08-15 @08:55:10 AM Appointment Booked
- 2019-07-22 @08:12:12 AM Appointment Booked

Account: Details

Delete Account Lock Account Reset Password Relink

Email johnnysmithmt85@gmail.com Change

Account Status Active
Last Login Time 2019-07-26 @12:01:11 PM
Last login attempt 2019-07-26 @12:01:11 PM
Activation Date 2019-01-22 @15:36:21 PM
Account Creation Date 2019-01-22 @15:35:48 PM

Access Rights: Has Access To

Add Save Undo changes

No shared account found

b. Click *Confirm*.

2. Click *Lock Account* in the section *Account: Details* to lock it.

- o A new window opens.

(Mr.) Smith, John ♂
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Demographics Identifiers Contacts Clinicians Other Relationships Enrollment DSQ Portal

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- 2019-08-15 @08:55:10 AM Appointment Booked
- 2019-07-22 @08:12:12 AM Appointment Booked

Account: Details

Delete Account Lock Account Reset Password Relink

Email johnnysmithmt85@gmail.com Change

Account Status Active
Last Login Time 2019-07-26 @12:01:11 PM
Last login attempt 2019-07-26 @12:01:11 PM
Activation Date 2019-01-22 @15:36:21 PM
Account Creation Date 2019-01-22 @15:35:48 PM

Access Rights: Has Access To

Add Save Undo changes

No shared account found

a. Click *Confirm*.

Unlocking a Portal Account

1. Click *Unlock the Account* in the section *Account: Details*.

2. Click *Confirm*.

Resetting a Password

A password reset can be requested by a patient who forgot their password. To reset a password, follow steps listed below:

1. Click *Reinitialize Password* in the section *Account : Details*.

- a. Note that patients can retrieve a forgotten password directly from the connection page of the clinic's portal.

The screenshot displays the 'Account: Details' section of a patient portal. At the top, there are navigation tabs: Demographics, Identifiers, Contacts, Clinicians, Other, Relationships, Enrollment, DSQ, and Portal. The 'Portal' tab is selected. Below the tabs, there are several buttons: 'Delete Account' (red), 'Lock Account' (red), 'Reset Password' (blue, circled in orange), and 'Relink' (blue). The 'Reset Password' button is highlighted with an orange circle. Below these buttons, there is a 'Change' button next to the email address 'johnnysmithmt85@gmail.com'. The 'Account Status' is 'Active'. Other details include 'Last Login Time: 2019-07-26 @12:01:11 PM', 'Last login attempt: 2019-07-26 @12:01:11 PM', 'Activation Date: 2019-01-22 @15:36:21 PM', and 'Account Creation Date: 2019-01-22 @15:35:48 PM'. Below this, there is a section for 'Access Rights: Has Access To' with 'Add', 'Save', and 'Undo changes' buttons. A message states 'No shared account found'. On the left, there is a 'Recent Activity' list with various appointment bookings from 2019-06-02 to 2019-11-10.

- o A new window opens.
- b. Click *Confirm* to send a reinitialization email. d'envoyer un courriel de réinitialisation.
- c. Confirm the email address with the patient prior to sending everything.

Modifying the Email for the Portal Account

In the portal section of the patient file, it is always possible to modify the email used by the patient to connect to their portal account. However, it is important to note that this modification does not modify the email address already listed in the heading of the patient file.

1. Click *Change* in the *Account : Details* section.

The screenshot displays the Patient Portal interface for John Smith. The top navigation bar includes tabs for Demographics, Identifiers, Contacts, Clinicians, Other, Relationships, Enrollment, DSQ, and Portal. The main content area is titled 'Account: Details' and contains the following information:

- Account Information:** Email: johnnysmitht185@gmail.com (with a 'Change' button), Account Status: Active, Last Login Time: 2019-07-26 @12:01:11 PM, Last login attempt: 2019-07-26 @12:01:11 PM, Activation Date: 2019-01-22 @15:36:21 PM, Account Creation Date: 2019-01-22 @15:35:48 PM.
- Access Rights:** Has Access To (with 'Add', 'Save', and 'Undo changes' buttons). Below this, it states 'No shared account found'.

On the left, a 'Recent Activity' sidebar lists events such as 'New Message', 'New Document', and several 'Appointment Booked' events from 2019. The top right corner shows a 'Close' button and a set of navigation icons (C1, C2, C3, R, A, \$, Tx).

- a. The field is now editable.
- b. Enter the patient's new email address.
- c. Click *Save*.
- d. A code will be generated. It will automatically be sent to the patient's previous email and they will have to enter it in the invitation sent to their new email.
 - o Please note that the portal email shall not change until the patient has accepted the invitation sent to their new email.

(Mr.) Smith, John ♂
Health Card SMJ85022306 (2025 / 01)
File Numbers N001000048
Date of Birth 1985/02/23 (35y 1m)

+1 (555) 555-9990 (Personal - Phone)
1224, Stanley Street, Montreal, Quebec
Canada
@johnnysmithmt185@gmail.com (Personal)

Dr. Charles Lee
N/A
N/A

C1 C2 C3 R A \$ Tx

Demographics Identifiers Contacts Clinicians Other Relationships Enrollment DSQ Portal

Recent Activity

- 2019-11-10 @11:41:07 AM New Document
- 2019-10-15 @22:44:01 PM Appointment Booked
- 2019-09-16 @21:12:01 PM Appointment Booked
- 2019-09-09 @22:32:00 PM Appointment Booked
- 2019-09-02 @21:56:01 PM Appointment Booked
- 2019-08-15 @08:55:10 AM Appointment Booked
- 2019-07-22 @08:12:12 AM Appointment Booked
- 2019-07-18 @07:36:01 AM Appointment Booked
- 2019-07-08 @11:05:03 AM Appointment Booked
- 2019-06-02 @23:36:00 PM Appointment Booked

Account: Details

Delete Account Lock Account Reset Password Relink

Email Cancel Save

Account Status Active
Last Login Time 2019-07-26 @12:01:11 PM
Last login attempt 2019-07-26 @12:01:11 PM
Activation Date 2019-01-22 @15:36:21 PM
Account Creation Date 2019-01-22 @15:35:48 PM

Access Rights: Has Access To

Add Save Undo changes

No shared account found

Relink an Account

The relinking of an account is possible when a patient account has been linked to the wrong portal account.

(Mr.) Smith, John ♂
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Date of Birth 1985/02/23 (35y 1m)

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1224, Stanley Street, Montreal, Quebec
Canada
@johnnysmithmt185@gmail.com (Personal)

Dr. Charles Lee
N/A
N/A

C1 C2 C3 R A \$ Tx

Demographics Identifiers Contacts Clinicians Other Relationships Enrollment DSQ Portal

Recent Activity

- 2019-11-10 @11:41:07 AM New Document
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- 2019-09-09 @22:32:00 PM Appointment Booked
- 2019-09-02 @21:56:01 PM Appointment Booked
- 2019-08-15 @08:55:10 AM Appointment Booked
- 2019-07-22 @08:12:12 AM Appointment Booked
- 2019-07-18 @07:36:01 AM Appointment Booked
- 2019-07-08 @11:05:03 AM Appointment Booked
- 2019-06-02 @23:36:00 PM Appointment Booked

Account: Details

Delete Account Lock Account Reset Password Relink

Email Change

Account Status Active
Last Login Time 2019-07-26 @12:01:11 PM
Last login attempt 2019-07-26 @12:01:11 PM
Activation Date 2019-01-22 @15:36:21 PM
Account Creation Date 2019-01-22 @15:35:48 PM

Access Rights: Has Access To

Add Save Undo changes

No shared account found

1. Click on the **Relink** button.
2. Choose if you want to relink the patient file to an existing portal account or if you want to create a new invitation.

3. Click *Re-associate* to complete the action or *Cancel* to close.

Sharing Portal Accounts (Family Management)

The Patient Portal tool allows the management of many patient profiles in the same portal account. This functionality gives patients the ability to easily manage profiles of patients in their care. In addition, since children having less than 14 years of age are not authorised to have a portal account, their parent or guardian has to manage them.

For confidentiality reasons, sharing accounts has to be performed at the clinic. It is not possible for patients to decide for themselves to have access to another portal account.

Types of access that can be shared:

- **DSE** : Functionality to be developed.
- **Documents** : Allows the consultation of shared documents by the clinic such as laboratory or imagery reports, forms, and others.
- **Messages** : Allows the reception of shared messages by the clinic.
- **Profile**: Allows the management of demographic information and connection to the profile.
- **Appointments**: Allows appointment scheduling.
- **Invoices**: Allows consultation of shared invoices.

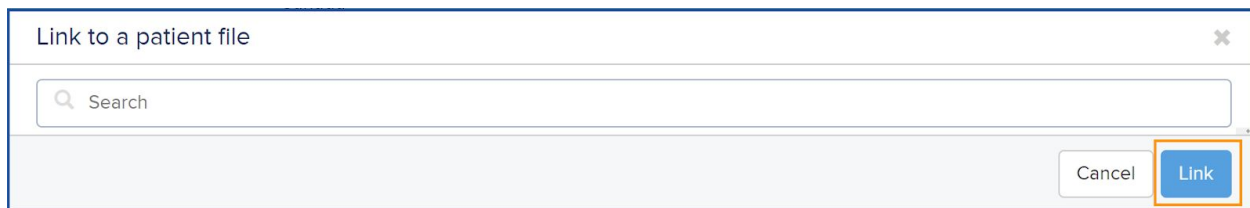
To add a profile to a patient portal, for example, to add a child to a parent account, follow steps listed below:

1. Go to the Portal section in the *Patient Profile* tab in the parent's file.
2. Click *Add* in the *Access Rights: Has Access To* section.

The screenshot displays the Patient Portal interface for a user named Mr. Smith, John. The top navigation bar includes tabs for Demographics, Identifiers, Contacts, Clinicians, Other, Relationships, Enrollment, DSQ, and Portal. The Portal tab is active, showing account details for the user's email, johnnysmithnt185@gmail.com. The account status is Active, and the last login time is 2019-07-26 @12:01:11 PM. The activation date is 2019-01-22 @15:36:21 PM. Below the account details, there is a section for Access Rights: Has Access To, which currently shows no shared accounts found. A red box highlights the 'Add' button in this section. The left sidebar shows a list of recent activities, including document uploads and appointment bookings.

- A new window opens

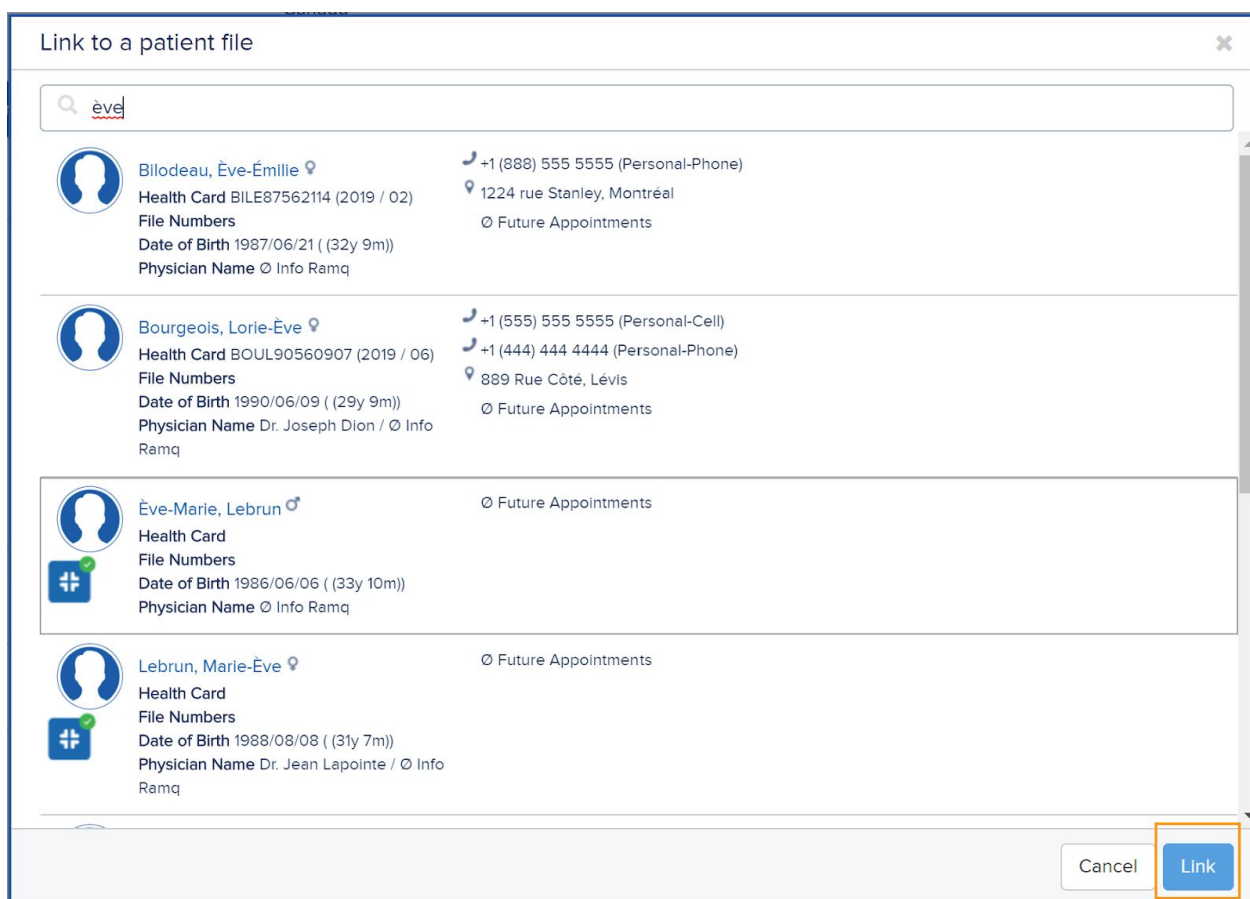
3. Enter the name of the patient that should be added to the portal account in the search field and select it in the list.
4. Click *Link*.
 - o The new profile now appears in the *Access Rights: Has Access To* section.



Link to a patient file


















Search

Cancel Link



Link to a patient file

ève

	Bilodeau, Ève-Émilie ♀ Health Card BILE87562114 (2019 / 02) File Numbers Date of Birth 1987/06/21 ((32y 9m)) Physician Name  Info Ramq	 +1 (888) 555 5555 (Personal-Phone)  1224 rue Stanley, Montréal  Future Appointments
	Bourgeois, Lorie-Ève ♀ Health Card BOUL90560907 (2019 / 06) File Numbers Date of Birth 1990/06/09 ((29y 9m)) Physician Name Dr. Joseph Dion /  Info Ramq	 +1 (555) 555 5555 (Personal-Cell)  +1 (444) 444 4444 (Personal-Phone)  889 Rue Côté, Lévis  Future Appointments
	Ève-Marie, Lebrun ♂ Health Card File Numbers Date of Birth 1986/06/06 ((33y 10m)) Physician Name  Info Ramq	 Future Appointments
	Lebrun, Marie-Ève ♀ Health Card File Numbers Date of Birth 1988/08/08 ((31y 7m)) Physician Name Dr. Jean Lapointe /  Info Ramq	 Future Appointments

Cancel Link

5. Select tabs that will be shared by checking the corresponding boxes.
6. Click *Save* to save all changes or *Cancel* to abort.

Access Rights: Has Access To							Add	Save	Undo changes
	EMR	DOCUMENTS	MESSAGES	PROFILE	APPOINTMENTS	BILLING			
Eve-Marie Lebrun	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			X

If we want to remove access to the shared account, simply click on the X in red on the right end. Remember to *Save* after completing modifications or *Cancel*.

The patient file that was shared will have a blue portal icon with an orange dot; it is normal that it stays this way. No activation is necessary on the part of the parent after the account has been shared.

Receiving Notifications in the Account of the Representative

In order for the account manager to receive notifications by email regarding the child's portal, it is important that the client be a representative in the Relationships section of the patient profile.

1. Go to the *Relationships* of the child.
2. Click on *+Related Profiles*.
 - A new window open.
3. Check the box next to *Representant* and specify the type of relationship
4. Search for the parent file and select it.
5. Click *Save*.

Please note that this type of sharing can also be performed between two adults; for example, a child taking care of a parent with reduced autonomy or two individuals who have the same email address.

Communicating from MYLE to Patient Portal Accounts

File Sharing with the Patient Portal

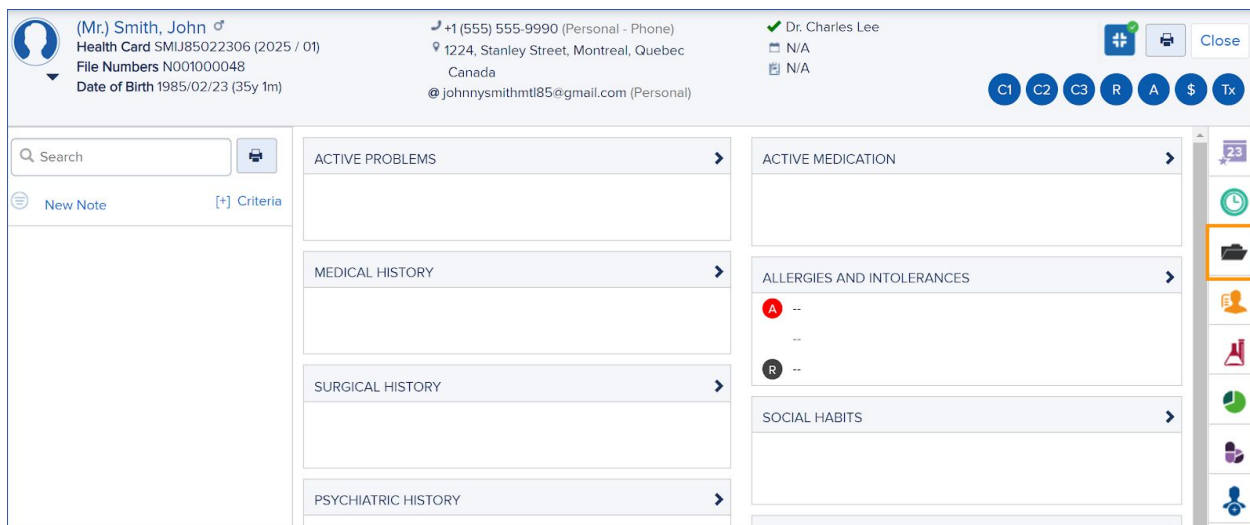
It is possible for healthcare professionals to share documents with their patients through the portal. Follow the steps below to do so:

1. Access the patient profile.

- Ensure that the patient has a portal account. If this is the case, the Portal icon will be blue with a green checkmark. If the icon has a different color, the patient has not completed the registration.



2. Click on the *Received Documents* icon.



3. Perform a search to find the desired document.

4. Send documents to the portal account of a patient using one of the two following options:

- Share a document directly through the Documents table.
 - Click on the portal icon, in the *Portal* column, in the table.

(Mr.) Smith, John ♂
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 File Numbers ND01000048
 Date of Birth 1985/02/23 (35y 1m)

+1 (555) 555-9990 (Personal - Phone)
 1224, Stanley Street, Montreal, Quebec
 Canada
 @johnnysmith185@gmail.com (Personal)

Dr. Charles Lee
 N/A
 N/A

Close

C1 C2 C3 R A S Tx

All Documents (0)
 Orphans

Documents
 All Documents

Search in documents

DOCUMENT DATE	TYPE	DESCRIPTION	DOCTOR	STATUS	PORTAL	ACTION
2020/04/6	Results - Laboratory			Not Approved		[+] / Approve / Tasks
2020/04/6	Clinical Note - Family Doctor			Not Approved		[+] / Approve / Tasks
2020/04/3	Summary - Medical Summary			Not Approved		[+] / Approve / Tasks

- A new window opens. To learn how to enter all fields, go to point number 5.

b. Share a document from the information page of a document.

- i. Click on the blue *i* icon in the *Action* column of the table.**

(Mr.) Smith, John ♂
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 Date of Birth 1985/02/23 (35y 1m)

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 1224, Stanley Street, Montreal, Quebec
 Canada
 @johnnysmith185@gmail.com (Personal)

Dr. Charles Lee
 N/A
 N/A

Close

C1 C2 C3 R A S Tx

All Documents (0)
 Orphans

Documents
 All Documents

Search in documents

DOCUMENT DATE	TYPE	DESCRIPTION	DOCTOR	STATUS	PORTAL	ACTION
2020/04/6	Results - Laboratory			Not Approved		[+] / Approve / Tasks
2020/04/6	Clinical Note - Family Doctor			Not Approved		[+] / Approve / Tasks
2020/04/3	Summary - Medical Summary			Not Approved		[+] / Approve / Tasks

- You are redirected to the information page of the document.

ii. **Select the portal icon at the bottom of the page.**

◦ A new window opens.

5. Checkmark the box aligned with a message if you would like to attach it to the message.

- By default, the document is attached to the message. To remove it, uncheck the box to the left of the document icon.

6. Add a title to the message in the *Subject* field

7. Enter your comments or recommendations to share in the empty field below the *New Message* section.

a. Pick *Select from list* if you have configured clickable text.

SEND TO PORTAL

MESSAGES

Dr Lapointe, Jean 2020-04-06 at 03:59:01 PM
Negative test

DOCUMENT

Results-Laboratory

NEW MESSAGE

Subject

Select from list

Cancel Sync To Portal

8. Select *Sync To Portal* to share information with the portal account or *Cancel* to close the window.

SEND TO PORTAL

MESSAGES

Dr Lapointe, Jean 2020-04-06 at 03:59:01 PM
Negative test

DOCUMENT

Results-Laboratory

NEW MESSAGE

Subject

Select from list

Cancel Sync To Portal

- Once the communication is shared with the patient's portal account, it is possible to revoke access.

Revoking Access to a Document Sent to the Portal

1. **Click on the portal icon in the *Portal* column in the table or in the information page of the document.**
 - A new window opens.
2. **Click on *Révoque All* at the bottom of the page.**

SEND TO PORTAL [Close]

SUBJECT
-

MESSAGES

Dr Lapointe, Jean 2020-04-06 at 03:59:01 PM
Negative test

DOCUMENT

Results-Laboratory

NEW MESSAGE

[Text Area]

Select from list

Revoke All Cancel Sync To Portal

Sharing a Message with the Portal Account of a Patient

It is possible for a MYLE user to send a unidirectional communication to any patient having a portal account. To do so, follow steps listed below:

1. Access the patient file with which you would like to share a message.

- The portal account of a patient is active when the portal icon is blue with a green dot. If the icon is another color, this indicates that the patient has not yet completed their registration.

2. Click on the patient portal icon at the top right corner of the page.



- A new window opens.

3. Enter the message to share in the empty field under the *New Message* section.

a. Choose *Select from list* if you have previously configured clickable text.

Portal Account Status

Account: Details

	Email johnnysmithmtl85@gmail.com
	Account Status Active
	Last Login Time 2019-07-26 @12:01:11 PM
	Last login attempt 2019-07-26 @12:01:11 PM
	Activation Date 2019-01-22 @15:36:21 PM
	Account Creation Date 2019-01-22 @15:35:48 PM

New Message

Select from list

Close
Send To Portal

4. Select *Send to Portal* to share the message with the patient's portal account or click *Close* to stop sending a message and go back to the patient file.

Portal Account Status

Account: Details

Email	johnnysmithmtl85@gmail.com
Account Status	Active
Last Login Time	2019-07-26 @12:01:11 PM
Last login attempt	2019-07-26 @12:01:11 PM
Activation Date	2019-01-22 @15:36:21 PM
Account Creation Date	2019-01-22 @15:35:48 PM

New Message

This is a message|

Select from list

Close Send To Portal

- Once the communication is shared with the patient portal account, it is possible to see if the message was shared successfully and if the patient has read the message or not. This information is found in the *Communications* section of the *History* tab in the patient file.

Managing Shared Messages with a Portal Account

There are two ways to manage shared messages with a patient portal account. If you would like to manage all shared messages for the same patient, it is recommended to manage them through the patient file. See how [here](#). If you would like to follow up on all messages shared through the portal, that have not yet been seen by the recipient, it is recommended to manage them through your Portfolio tab.

To manage messages shared from the patient file, follow steps below:

1. Access the patient file for which you want to manage messages.
2. Click on the *History* tab in the right navigation menu; then, on the *Communications* tab at the top of the page.

The screenshot shows the Patient Portal interface for Mr. John Smith. At the top, there is a header with patient details: (Mr.) Smith, John, Health Card SMJ85022306 (2025 / 01), File Numbers N001000048, Date of Birth 1985/02/23 (35y 1m). Contact information includes a phone number +1 (555) 555-9990 (Personal - Phone), address 1224, Stanley Street, Montreal, Quebec, Canada, and email johnsmithmtl85@gmail.com (Personal). A doctor's name, Dr. Charles Lee, is also listed with N/A for both name and phone. On the right, there are navigation icons for C1, C2, C3, R, A, \$, and Tx, along with a Close button.

Below the header is a navigation bar with tabs for Appointment, Messaging, Tasks, Recall, Communications (highlighted), and Private Billing. The main content area is titled 'Communications' and displays a message from Dr. Lapointe, Jean, dated 2020/04/07 at 10:24:45 AM. The message text is 'Left a Message' and 'This is a message'. To the right of the message is a small icon with a green dot and an orange dot.

◦ The message history for all messages shared with the patient appears on this page.

- A message with a green dot has been shared with and seen by the patient.
- A message with an orange dot has been shared, but was not seen by the patient.
- A message with a red dot is no longer being shared with the patient.

3. Click on the icon to the right of a message to open the *Send To Portal* window.

- A new window opens.

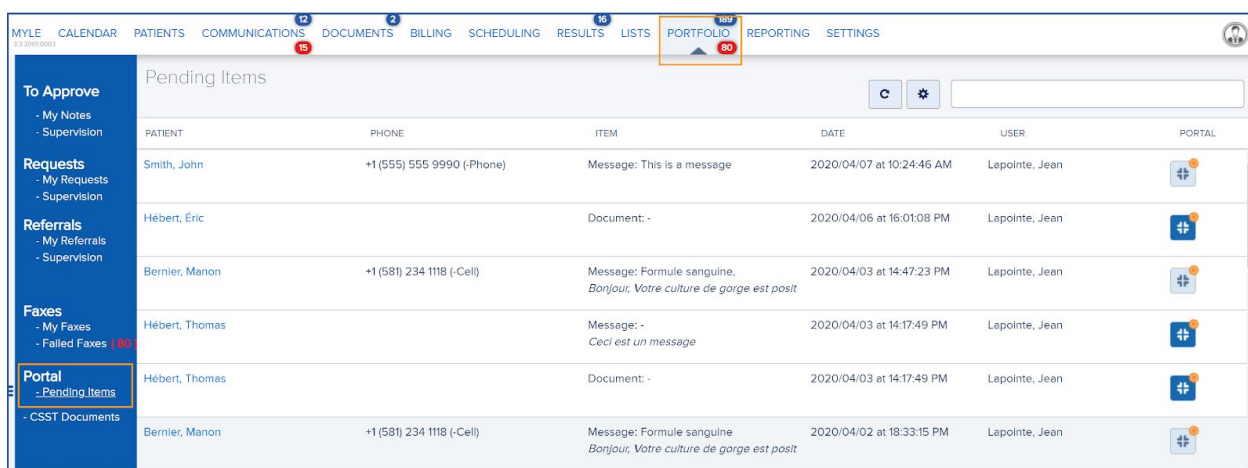
a. Select, if necessary, **Revoke All** so that the message is no longer accessible on the patient's portal account. Use this method if you have shared a message by mistake or if the message is no longer relevant.

The screenshot shows a 'SEND TO PORTAL' window. The title bar says 'SEND TO PORTAL' with a close button (X) on the right. Below the title bar is a section labeled 'NEW MESSAGE'. Inside this section is a text area containing the message 'This is a message'. At the bottom of the window, there are three buttons: 'Revoke All' (highlighted with a red box), 'Cancel', and 'Sync To Portal'.

- The communication is automatically removed from the patient portal.

To manage all messages shared from the Portfolio tab, follow steps listed below:

1. Go to the *Portfolio* tab. Note that only users with a clinician account can access the *Portfolio* tab.
2. Click on *Pending Items* in the left margin of the *Portal* section.



PATIENT	PHONE	ITEM	DATE	USER	PORTAL
Smith, John	+1 (555) 555 9990 (-Phone)	Message: This is a message	2020/04/07 at 10:24:46 AM	Lapointe, Jean	+
Hébert, Éric		Document: -	2020/04/06 at 16:01:08 PM	Lapointe, Jean	+
Bernier, Manon	+1 (581) 234 1118 (-Cell)	Message: Formule sanguine, Bonjour, Votre culture de gorge est positif	2020/04/03 at 14:47:23 PM	Lapointe, Jean	+
Hébert, Thomas		Message: - Ceci est un message	2020/04/03 at 14:17:49 PM	Lapointe, Jean	+
Hébert, Thomas		Document: -	2020/04/03 at 14:17:49 PM	Lapointe, Jean	+
Bernier, Manon	+1 (581) 234 1118 (-Cell)	Message: Formule sanguine Bonjour, Votre culture de gorge est positif	2020/04/02 at 18:33:15 PM	Lapointe, Jean	+

- A table lists all items shared with patients.
- An item with a blue icon indicates that at least one artifact is attached. It can be a document, a result, or even an invoice.
- An item with a grey icon indicates that only a message is shared.

3. Perform, as needed, a search in the dedicated field using the name, the last name, the patient's phone number or the content of a shared message.

4. If necessary, click on the settings icon and filter items by their type in order to display messages only.

a. Check the box in line with *Messages*.

b. Click *OK* to apply the filter.

The screenshot shows a search and filter interface for a patient portal. At the top right, there is a search bar and a settings gear icon, both highlighted with orange boxes. Below this, there are four filter sections: 'Date' (with two 'Today' filters), 'Sites' (listing CLINIC A through E and 'organisation test 12'), 'Clinicians' (with a search bar and a list of names), and 'Item Type' (with checkboxes for Documents, Invoices, Messages, and Results). The 'Messages' checkbox is highlighted with an orange box. At the bottom, there is a 'RESULTS PER PAGE' dropdown set to 50, and 'CANCEL' and 'OK' buttons.

- Only messages are now visible in the window.

5. Click on the portal icon to the right of a communication to access its contents.

- A new window opens.
 - a. **Select , if necessary, *Revoke all* so that the message is no longer visible on the patient portal account.** Use this method if you have shared a message by mistake or if the message is no longer relevant.

The screenshot shows a dialog box titled 'SEND TO PORTAL' with a close button (X) in the top right corner. Below the title is the text 'NEW MESSAGE'. A large text area contains the message 'This is a message'. At the bottom right, there are three buttons: 'Revoke All' (highlighted with an orange box), 'Cancel', and 'Sync To Portal'.

- The communication is automatically removed from the window as well as the patient's portal.

Managing all items shared and unread through the portfolio

Configure the display of items shared with the portal through your Portfolio

It is possible for a MYLE user to share communications, documents, results, and invoices with the portal account for patients of the clinic. For users having a clinical account, it is possible to manage unread items by all collaborators of the clinic through your Portfolio. To do this, follow steps listed below:

1. **Go to the *Portfolio* tab.** Note that only users with a clinical account can access the Portfolio tab.
2. **Click on *Pending Items* under the *Portal* section in the left menu.** Note that only items unread by the recipient are displayed.
 - By default, only items shared by you are displayed.

PATIENT	PHONE	ITEM	DATE	USER	PORTAL
Smith, John	+1 (555) 555 9990 (-Phone)	Message: This is a message	2020/04/07 at 10:24:46 AM	Lapointe, Jean	
Hébert, Éric		Document: -	2020/04/06 at 16:01:08 PM	Lapointe, Jean	
Bernier, Manon	+1 (581) 234 1118 (-Cell)	Message: Formule sanguine, <i>Bonjour, Votre culture de gorge est positif</i>	2020/04/03 at 14:47:23 PM	Lapointe, Jean	
Hébert, Thomas		Message: - <i>Ceci est un message</i>	2020/04/03 at 14:17:49 PM	Lapointe, Jean	
Hébert, Thomas		Document: -	2020/04/03 at 14:17:49 PM	Lapointe, Jean	
Bernier, Manon	+1 (581) 234 1118 (-Cell)	Message: Formule sanguine <i>Bonjour, Votre culture de gorge est positif</i>	2020/04/02 at 18:33:15 PM	Lapointe, Jean	

- A blue icon indicates that at least one artifact is shared with the portal account.
 - A grey icon indicates that only a message is shared with the portal account.
 - The orange dot indicates that the shared item has not yet been seen by the patient. The item is pending. When the patient will have consulted the item, it will disappear from the table.
3. **Click on the settings icon in the top right corner of the page to select items to display.**

The screenshot shows a search and filter interface for a Patient Portal. At the top right, there is a search bar and a settings icon (a gear) highlighted with an orange box. Below this, the interface is divided into four columns: 'Date', 'Sites', 'Clinicians', and 'Item Type'. The 'Date' column contains two input fields, each with a calendar icon and the text 'Today'. The 'Sites' column lists several clinics with checkboxes: CLINIC A, CLINIC B, CLINIC C, CLINIC D, CLINIC E, Clinique D mo, and organisation test 12. The 'Clinicians' column has a search box and a list of doctors with checkboxes: Dr. Allergologue, Sp cialiste; Dr. Aub , Julien; Dr. Aylwin-Descoteaux, Laurie; Dr. Beaudoin, Isabelle; Dr. Beaulieu, Oscar; Dr. Belleville, L a; Dr. Bernard, Roger; Dr. Cantillo, Victoria; Dr. Caron, Philippe; Dr. Castro, Philippe; Dr. Chirurgien, Sp cialiste; Dr. Cormier, Simon; Dr. Cornet, Isabelle; Dr. Courtois, Alex; and Dr. ... The 'Item Type' column lists document types with checkboxes: Documents, Invoices, Messages, and Results. At the bottom of the interface, there is a 'RESULTS PER PAGE' dropdown menu set to 50, and 'CANCEL' and 'OK' buttons.

a. Display items according to specific dates defined by entering one or both fields in the *Date* column.

- i. Enter a date in the top field to display only items shared starting from the selected date inclusively. Use the calendar icon to select a date or click on *Today* to enter the current date.
- ii. Add a date in the lower field to display only items shared before the selected date inclusively. Use the calendar icon to select a date or click on *Today* to enter the current date.
- iii. Enter a date in both fields to display all items shared during the interval between the selected dates inclusively.

The screenshot shows a web interface with a top navigation bar containing a printer icon, a 'C' button, a settings gear icon, and a search input field. Below this is a main content area with four columns: 'Date', 'Sites', 'Clinicians', and 'Status'.
 - The 'Date' column has two date pickers. The first is set to '2020/03/01' and the second is set to 'Today'. A calendar for April 2020 is open, showing the 7th as the selected date.
 - The 'Sites' column has a header checkbox and a list of items: CLINIC A, CLINIC B, CLINIC C, CLINIC D, CLINIC E, Clinique Démo, organisation test 12, and ONLY SELECTED SITES. All checkboxes are checked.
 - The 'Clinicians' column has a 'SEARCH' input field and a list of names: Dr Allergologue, Spécialiste; Dr Aubé, Julien; Dr Aylwin-Descoteaux, Laurie; Dr Beaudoin, Isabelle; Dr Beaulieu, Oscar; Dr Belleville, Léa; Dr Bernard, Roger; Dr Cantillo, Victoria; Dr Caron, Philippe; Dr Castro, Philippe; Dr Chirurgien, Spécialiste; Dr Cormier, Simon; Dr Cornet, Isabelle; Dr Courtois, Alex.
 - The 'Status' column has a header checkbox and a list of items: Approuvée, En attente, Non-approuvée, and Retournée. The 'En attente' and 'Non-approuvée' checkboxes are checked.
 At the bottom, there is a 'RESULTS PER PAGE' dropdown set to '50', and 'CANCEL' and 'OK' buttons.

b. Checkmark the box aligned with a site to update the list of clinicians. It is possible to select more than one site.

i. Check the box at the top of the column named *Sites* to select all sites simultaneously.

This screenshot is similar to the one above but shows a different state. The 'Sites' column header checkbox is highlighted with an orange box. The 'Sites' list items are: CLINIC A, CLINIC B, CLINIC C, CLINIC D, CLINIC E, Clinique Démo, and organisation test 12. All checkboxes are currently unchecked. The 'Clinicians' and 'Item Type' columns are visible, with 'Item Type' containing 'Documents', 'Invoices', 'Messages', and 'Results'. The 'RESULTS PER PAGE' dropdown is still set to '50', and 'CANCEL' and 'OK' buttons are at the bottom.

c. **Add shared items from one of your colleagues to your list by adding a checkmark next to their name.** It is possible to select more than one clinician.

- i. Note that contributors in the list represent those from selected sites.
- ii. Enter their name in the search field to find it in the list and check the box to the left of their name.
- iii. Check the box at the top of the *Cliniciens* column to select all contributors simultaneously.

The screenshot displays a web interface for a patient portal. At the top, there are navigation icons (a 'C' and a gear) and a search bar. Below this, the interface is divided into several columns: 'Date', 'Sites', 'Cliniciens', and 'Item Type'. The 'Date' column has two input fields, each with a calendar icon and the word 'Today' below it. The 'Sites' column lists several clinic names with checkboxes: CLINIC A, CLINIC B, CLINIC C, CLINIC D, CLINIC E, Clinique Démo, and organisation test 12. The 'Cliniciens' column is highlighted with an orange border and contains a search bar and a list of names with checkboxes: Dr. Allergologue, Spécialiste; Dr. Aubé, Julien; Dr. Aylwin-Descoteaux, Laurie; Dr. Beaudoin, Isabelle; Dr. Beaulieu, Oscar; Dr. Belleville, Léa; Dr. Bernard, Roger; Dr. Cantillo, Victoria; Dr. Caron, Philippe; Dr. Castro, Philippe; Dr. Chirurgien, Spécialiste; Dr. Cormier, Simon; Dr. Cornet, Isabelle; and Dr. Courtois, Alex. The 'Item Type' column has a vertical scrollbar and lists 'Documents', 'Invoices', 'Messages', and 'Results', each with a checkbox. At the bottom left, there is a filter icon, a dropdown menu set to '50', and the text 'RESULTS PER PAGE'. At the bottom right, there are 'CANCEL' and 'OK' buttons.

d. **Define the item type that you would like to display in the window by selecting options in the *Item Type* column.** It is possible to select more than one item.

- i. Check *Documents* to display shared documents.
- ii. Select *Invoices* to display shared invoices.
- iii. Click on *Messages* to display shared messages.

- iv. Checkmark *Results* to display shared results.

The screenshot displays a Patient Portal interface with a filter overlay. At the top right, there are buttons for 'C' (clear) and a settings gear icon, followed by a search input field. The filter overlay is divided into four columns:

- Date:** Two date pickers, both set to 'Today'.
- Sites:** A list of checkboxes for 'CLINIC A', 'CLINIC B', 'CLINIC C', 'CLINIC D', 'CLINIC E', 'Clinique Démo', and 'organisation test 12'.
- Clinicians:** A search box labeled 'SEARCH' and a list of checkboxes for various doctors, including 'Dr. Allergologue, Spécialiste', 'Dr. Aubé, Julien', 'Dr. Aylwin-Descoteaux, Laurie', 'Dr. Beaudoin, Isabelle', 'Dr. Beaulieu, Oscar', 'Dr. Belleville, Léa', 'Dr. Bernard, Roger', 'Dr. Cantillo, Victoria', 'Dr. Caron, Philippe', 'Dr. Castro, Philippe', 'Dr. Chirurgien, Spécialiste', 'Dr. Cormier, Simon', 'Dr. Cornet, Isabelle', and 'Dr. Courtols, Alex'.
- Item Type:** A list of checkboxes for 'Documents', 'Invoices', 'Messages', and 'Results'. The 'Results' checkbox is highlighted with an orange border.

At the bottom left, there is a settings icon, a dropdown menu set to '50', and the text 'RESULTS PER PAGE'. At the bottom right, there are 'CANCEL' and 'OK' buttons.

- e. Click **OK** in the bottom right corner of the window to apply filters to displayed items or **Cancel** to keep the same view.
- 4 Modify the number and order of table columns in your portfolio by clicking on the settings icon at the top right corner of the page.
- a. Select the settings icon at the bottom left corner of the window.

The screenshot shows a search results interface with the following sections:

- Date:** Two filters labeled "Today" with calendar icons.
- Sites:** A list of checkboxes for CLINIC A, CLINIC B, CLINIC C, CLINIC D, CLINIC E, Clinique D mo, and organisation test 12.
- Clinicians:** A search bar labeled "SEARCH" and a list of checkboxes for various doctors including Dr. Allergologue, Sp cialiste, Dr. Aub , Julien, Dr. Aylwin-Descoteaux, Laurie, Dr. Beaudoin, Isabelle, Dr. Beaulieu, Oscar, Dr. Belleville, L a, Dr. Bernard, Roger, Dr. Cantillo, Victoria, Dr. Caron, Philippe, Dr. Castro, Philippe, Dr. Chirurgien, Sp cialiste, Dr. Cormier, Simon, Dr. Cornet, Isabelle, and Dr. Courtois, Alex.
- Item Type:** A list of checkboxes for Documents, Invoices, Messages, and Results.
- Footer:** A "RESULTS PER PAGE" dropdown menu set to 50, and "CANCEL" and "OK" buttons.

- A new window opens.

The dialog box is titled "COLUMN DISPLAY CONFIGURATION" and contains the following elements:

- Available Columns:** A list containing "User".
- Displayed Columns:** A list containing "Patient", "Phone", "Item", "Date", and "Portal".
- Navigation:** A right-pointing arrow between the two lists, and a left-pointing arrow below it. On the right side of the "Displayed Columns" list, there are up and down arrow buttons for reordering.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

- Modify the column order in your window by selecting a title in the *Displayed Columns* section.**

- Use the arrows to the right of the section to move it.
 - Items at the top of the section appear to the left of the window and items at the bottom of the section appear on the right of the window.
- c. **Completely remove a column from your window by selecting the title in the *Displayed Columns* section.**
- Use the arrow pointing left to move the title into the *Available Columns* section.
- d. **Add a column to your window by selecting the title in the *Available Columns* section.**
- Use the arrow pointing to the right to move a title in the *Displayed Columns* section.
- e. **Click on *Save* to apply modifications to your portfolio window or on *Cancel* to close the window.**

Modifying Shared Items from the Portfolio

It is possible to modify items shared with a portal account at all times. To modify an item in waiting from your Portfolio, follow steps listed below:

1. **Go to the *Portfolio* tab.** Note that only users with a clinical account can access the *Portfolio* tab.
2. **Click on Pending Items under the *Portal* section in the left menu.**
 - a. By default, only items shared by you are displayed. To configure the display click [here](#).
 - b. The orange dot indicates that the shared item has not yet been seen by the patient. Once the patient has seen the item, it will disappear from the window.
3. **Use the search field to find the item you would like to modify.**
4. **Click on the portal icon, to the right of the item, to open the Send to Portal window.**

MYLE CALENDAR PATIENTS COMMUNICATIONS DOCUMENTS BILLING SCHEDULING RESULTS LISTS PORTFOLIO REPORTING SETTINGS							
Pending Items							
PATIENT	PHONE	ITEM	DATE	USER	PORTAL		
Smith, John	+1(555) 555 9990 (-Phone)	Message: This is a message	2020/04/07 at 10:24:46 AM	Lapointe, Jean			
Hébert, Éric		Document: -	2020/04/06 at 16:01:08 PM	Lapointe, Jean			
Bernier, Manon	+1(581) 234 1118 (-Cell)	Message: Formule sanguine, Bonjour, Votre culture de gorge est positif	2020/04/03 at 14:47:23 PM	Lapointe, Jean			
Hébert, Thomas		Message: - Ceci est un message	2020/04/03 at 14:17:49 PM	Lapointe, Jean			
Hébert, Thomas		Document: -	2020/04/03 at 14:17:49 PM	Lapointe, Jean			
Bernier, Manon	+1(581) 234 1118 (-Cell)	Message: Formule sanguine Bonjour, Votre culture de gorge est positif	2020/04/02 at 18:33:15 PM	Lapointe, Jean			
Bernier, Manon	+1(581) 234 1118 (-Cell)	Message: Formule sanguine, Tout est beau, on se revoir au besoin.	2020/04/02 at 17:59:19 PM	Lapointe, Jean			
D Test EN, Marion		Message: This is a message.	2020/04/02 at 17:15:40 PM	Lapointe, Jean			
Blouin, Kassandra	+1(444) 444 4444 (-Cell)	Message: Formule sanguine, Réticulocyte Bonjour, Votre résultat a été reçu et est r.	2020/04/02 at 16:16:10 PM	Lapointe, Jean			
Blouin, Kassandra	+1(444) 444 4444 (-Cell)	Result: Formule sanguine, Réticulocytes	2020/04/02 at 16:16:10 PM	Lapointe, Jean			

- A blue icon indicates that at least one artifact is shared with the portal account.
- A grey icon indicates that only a message is shared with the portal account.
- A new window with the detail of the shared item opens.

Exam request.pdf 1 / 1

Clinique Démo
1224 Rue Stanley, Montreal, Quebec, H3B1H7, Canada
Tel: +1-(185) 563-3327

Ms. Bernier, Manon
Health Card BERM64561804 (2023-02) **Tel** +1-(581) 234-1118
DOB 1964-06-18 **Address** 1224 Stanley
Gender Female **Montréal, Quebec**
File Number D1234 **J2S7Z7, Canada**

REQUEST

Description test

SEND TO PORTAL ✕

SUBJECT

-

MESSAGES

Dr Lapointe, Jean 2020-04-07 at 10:48:25 AM
Negative test

DOCUMENT

Results - Laboratory

File(s) Exam request.pdf

NEW MESSAGE

This is a message.

Select from list

Revoke All
Cancel
Sync To Portal

1. **Modify items shared with the patient portal account.**
 - a. Note that modifications can only be made to items with a blue icon. Items with a grey icon can only be revoked. See how here.
 - b. **Send a new message to the patient about a first message by adding it to the New Message text field.**
 - i. **Click on *Sync To Portal* to send it all.**

SEND TO PORTAL ×


SUBJECT

-

MESSAGES

Dr Lapointe, Jean 2020-04-07 at 10:49:20 AM
Negative test +

DOCUMENT

 Results - Laboratory +
File(s) [Exam request.pdf](#)

NEW MESSAGE

[Select from list](#)


Revoke All Cancel Sync To Portal

- c. **Revoke or add an item to share by checking or unchecking the box aligned with the item.**



SEND TO PORTAL ×

SUBJECT
-

MESSAGES

Dr Lapointe, Jean 2020-04-07 at 10:49:20 AM
Negative test 

DOCUMENT

 Results - Laboratory 
File(s) [Exam request.pdf](#)

NEW MESSAGE

[Select from list](#)

Revoke All Cancel Sync To Portal

- i. Click on *Sync to Portal* to send everything.
- d. Revoke the entire item by clicking on *Revoke All*.

The screenshot displays a web interface for a patient portal. On the left, a PDF document titled 'Exam request.pdf' is open, showing patient information for 'Clinique Démo' and a request description. On the right, a 'SEND TO PORTAL' sidebar is visible, containing sections for SUBJECT, MESSAGES, DOCUMENT, and NEW MESSAGE. The DOCUMENT section shows a checked item 'Results - Laboratory' with the file 'Exam request.pdf'. At the bottom of the sidebar, there are three buttons: 'Revoke All' (highlighted with a red box), 'Cancel', and 'Sync To Portal'. A 'Select from list' link is also present.

Exam request.pdf 1 / 1

Clinique Démo
1224 Rue Stanley, Montreal, Quebec, H3B1H7, Canada
Tel: +1-(185) 563-3327

Ms. Bernier, Manon
Health Card BERM64561804 (2023-02) Tel +1-(581) 234-1118
DOB 1964-06-18 Address 1224 Stanley
Gender Female Montréal, Quebec
File Number D1234 J2S7Z7, Canada

REQUEST
Description test

SEND TO PORTAL

SUBJECT
-

MESSAGES
 Dr Lapointe, Jean 2020-04-07 at 10:49:20 AM
Negative test

DOCUMENT
 Results - Laboratory
File(s) Exam request.pdf

NEW MESSAGE
[Text input field]
Select from list

Revoke All Cancel Sync To Portal

- i. Note that revoking an item removes it from the *Pending Items* of your portfolio.

Annexe

Guided Exercises

The objective of this exercise is to guide you in acquiring sufficient knowledge of the patient portal.

In order to complete these exercises, you will need two test patients as well as two email addresses. We recommend that you create them in advance if not already done.

Account Management - Tutorial	
1- Creating a Portal Account through the MYLE Patient File	<ol style="list-style-type: none"> 1. Access your test patient #1 2. Click the portal icon on the top right 3. Enter your email, if not already populated 4. Click <i>Send</i> 5. Take a note of the generated code 6. Observe the portal icon is now blue with an orange dot. 7. Access your email 8. Open the activation email that you have received 9. Click on the <i>Activate my Account</i> button 10. Enter the code generated in step 5 in the field <i>Clinic Code</i> 11. Create and enter your password in the <i>Password</i> field 12. Confirm your password 13. Accept the terms and conditions 14. Return to your test patient in MYLE 15. Observe that the portal icon now has a green checkmark indicating that the invitation to the portal has been accepted
2- Creating a Portal Account through the Portal Website	<ol style="list-style-type: none"> 1. In this exercise, you create a portal account as if a patient went directly to the website and created an account. 2. Access your portal website 3. Click <i>Create an account</i> 4. Fill in the form (with information corresponding to your test patient #2) 5. Click <i>Create an account</i> 6. Access your email

	<ol style="list-style-type: none"> 7. Open the activation email received 8. Click <i>Activate my Account</i> 9. Accept the terms & conditions
<p>3- Linking a Portal Account to a Patient File in MYLE</p>	<ol style="list-style-type: none"> 1. Access the <i>Calendar</i> tab 2. Access the Patient Search, on the left side of the page 3. Click <i>Search in the Portal</i> 4. Search the portal account created in the previous exercise (Creating a Portal Account through the Portal Website), by the name, the Health Insurance Card Number or the email entered during account creation. 5. Click on your portal account that appears in the search results 6. In the window that appears, in the left column, select the corresponding MYLE file. 7. Click Attach
<p>4- Sharing two Portal Accounts (eg : parent-child)</p>	<ol style="list-style-type: none"> 1. Access one of your test patients, that will perform account management (parent) 2. Access the <i>Portal section</i>, that is found in the <i>Patient Profile</i> tab 3. In the section <i>Access Control</i>, click <i>Add</i> 4. Search a child account, select it and click <i>Link</i> 5. Click <i>Save</i> 6. Go to the portal account of your test patient 7. Observe that the name of the account linked during this exercise appears in the account
<p>Sharing documents - Tutorial</p>	
<p>5- Sharing a Scanned Document</p>	<ol style="list-style-type: none"> 1. Access your test patient 2. Access the <i>Received Documents</i> 3. Click on the portal button appearing on the line with document details 4. Insert a comment 5. Click <i>Sync to Portal</i>

6- Consult a Shared Document on the Portal

1. Access the portal website
2. Connect to your portal
3. Access the *Documents* section of your portal
4. Click on the document to visualize (note that the collaborator comment is visible without having to click on the document)