How to Use MyChart

Congratulations on signing up for MyChart! You now have access to your medical records, your care team, and much more. Now that you have signed up, you need to know how to access and navigate MyChart.

Home Page:

1. To access MyChart’s log-in page, type https://mychart.confluencehealth.org/MyChart in the address bar of your internet browser.

2. Enter the username and password that you selected when signing up for MyChart. If you are unable to login for any reason, contact our Patient Services department at 1-888-499-4801.

3. The Home Page has buttons across the top to access different activities.
   a. Circular buttons next to your name are patients that you have Proxy access for.
   b. Note that the site can also be viewed in Spanish.

4. In the center of your home page, is your notification area as well as your To Do events.
Activities:

1. Along the right of your screen are your **Quick Links** to common activities and your Care Team.

   ![Quick Links]

   a. Click here to see your test results
   b. Click here to ask your Care Team a question
   c. Click here to schedule an appointment with your Care Team
   d. Click here to ask for a refill
   e. Click here to see your health summary
   f. Click here to see our bill

2. You can also message or request an appointment with a member of your care team by clicking either the envelope or calendar icons below the provider’s name.

   ![Care Team]

   - Click the 💌 for messages
   - Click the 🗓️ for appointment requests

3. At the bottom of your screen you’ll find new MyChart options.

   ![What's New in MyChart]

   **Tips for Using MyChart**
   Are you new to using MyChart? To help you get started, we have provided a document that will help you learn to use MyChart.
   MyChart Tip Sheet

   **Schedule your appointments online through MyChart**
   You can directly schedule an appointment with your primary care physician in MyChart without assistance from scheduling staff. Just enter a reason for the visit, select your Primary Care Provider (PCP), and date and time preferences for the appointment. You then choose from a list of available appointment slots and schedule your appointment! Schedule an Appointment

   **Customer service questions**
   Do you have a question about a recent bill or your insurance?
   Ask Customer Service

   **Pay your bill online**
   Did you know you can pay your bill through MyChart? The Billing Account Summary provides a concise list of your accounts along with payment features. Up-to-date payment and balance information appears for any outstanding accounts. You can securely pay bills by credit card from MyChart and view a list of past payments.
   View Your Account Summary

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Schedule an Appointment:

1. Schedule an appointment with a provider. Hover over the Visits icon and select Schedule an Appointment.

2. Select the provider you wish to schedule with from the list of providers you’ve seen in the past or choose a specific reason for scheduling an appointment to choose from the department.

3. Go through each category and make your selections. Click START OVER to return to the first page.

4. Once you get to the time section, select the date range and time that work for you.

5. An insurance alert will appear if your insurance may not cover the type of appointment you selected. If in doubt, verify with your insurance company.
6. Verify your personal information. Click EDIT to change the information or click THIS INFORMATION IS CORRECT if there are no changes.

7. Enter a comment if necessary. To schedule the appointment, click SCHEDULE.
Notes:
1. Some providers may elect to share their progress note from your visit with you. You will access these notes with the **Visits** button.
   a. Hover over **Visits** and select **Appointments and Visits**.
   b. Select the appointment you wish to see details of.
   c. Select either your **Visit Summary** or **Notes**.

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2. Under **Health**, you have access to everything from test results to your allergies. **Most – not all – results will now be sent via MyChart and will no longer be sent in the mail.** You will receive an email directing you to check your MyChart for your test results.

3. If you have requested a copy of your medical records, you can view those by clicking **Download My Record** from the menu listed above. A list of the records you requested, along with the date you submitted the request, will appear.
Billing:

4. You have access to your account for billing information under the **Billing** button. Here you can pay your bills, see your account summary, and what’s been billed to insurance. Details about the insurance coverage that we have loaded in our system for you are also available.

![Billing Account Summary](image)

5. Under **Settings**, you can access your demographics and preferences. You can also select **Notifications** to enter a new email address and set alerts (i.e. notifications when you have a message or test results). You will receive a notification to **Confirm** your contact information every 90 days.

![Settings](image)

6. Again, congratulations on signing up for MyChart! Remember, if you have any questions please contact our Patient Services department at 1-888-499-4801.