SRS Communicator

1. Your provider's office will give you a temporary password. Retain this document!

2. You will receive an email containing a link to set up your account. Click on the link.

3. The **Create New Account** screen displays. Your email address is the **Username**.

Enter Temporary password - type in the temporary password provided by the practice.

Enter New password - type in a new password.

Confirm password - reenter the new password and then <u>click out of this field</u>

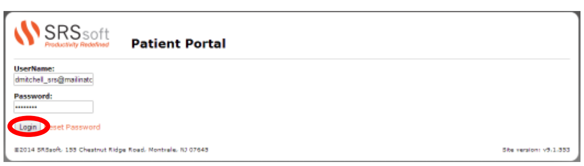
4. Click on the **Next** button.

5. A screen with three security questions appears. Click on the down arrow and click on a security question to select it.

6. Type the answer to the selected question in the field below the question. Answers are case sensitive.

7. Repeat for the remaining security questions and then click on the **Create Account** button.

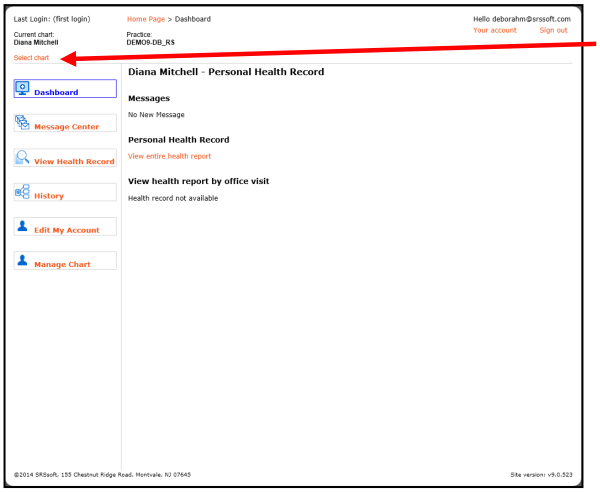
8. The **Patient Portal** log-in screen appears. Enter your **UserName** (email address) and **Password**. Then click on the **Login** button.



Note: It is recommended that this webpage is saved as a Favorite in your internet browser. The address is https://myportal.srssoft.com.

9. The **Terms and Conditions** screen appears; click on the **Accept** button.

10. Your SRS Communicator account displays. Orange colored text indicates a link to the information indicated; click on the orange text to view the information.



The top-left of the screen displays the name of the patient. If the account is linked to more than one chart, as in the case of a parent with children, click on the orange **Select chart** link to change the patient to the desired chart.

<u>**Dashboard**</u> – This is the default view when logging into the SRS Communicator. It provides a summary view of the patient's chart.

- **Messages** – indicates if a new message is waiting.
- **Personal Health Record** – indicates if the health history for the patient is available.
- **View health report by office visit** – indicates if the patient's Clinical Summary is available.

<u>**Message Center**</u> - Click on the **Message Center** navigation button.

To send a message:

1. Click on one of the options:
   - **Compose New Message** – Click on this to send a message to the doctor.
   - **Request a change to my chart** - Click on this to send a message to the practice to make a change to the chart, e.g. a change of address.

2. The **Send new message** dialog box appears. Click on the down arrow next to the **Subject** field and click on a **Subject** to select it.

3. Click on the down arrow next to the **To** field and select a recipient from the list

4. Type in the message and click on the **Send** button.

To view a message:

1. The **Dashboard** indicates the presence of a new message. Click on the orange text.

   —OR—

   Click on the **Message Center** navigation button.

2. The **Inbox** displays, click on the message to open it.

3. The message displays. Click on the **Reply** button to send a response, or click on the **X** button to close the message.

To delete a message:
1. Click in the checkbox in the message list; **Delete Selected Messages** is activated.

2. Click on **Delete Selected Messages**. A dialogue box appears. Click on the **OK** button.

View Health Record – Click on the **View Health Record** navigation button, the patient's **Personal Health Record** displays. This is the complete health history.

At the top of the **Health Record** are two buttons:
- **Save health record** – click to download a copy of the Health Record.

- **Send health record** – click to forward a copy of the Health Record to a provider at a different practice. This requires the account holder enter the recipient's direct-address; it does not utilize standard email.

History - Click on the **History** navigation button to view the health history.

To view the history:
1. Click on the orange link for:

   - **All activities in the last 30 days**

     –OR–

   - **All activities in the last 60 days**

     –OR–

   Enter a date range and click on the **Go** button.

2. The history displays. Click on a different navigation link to close this view.

Edit My Account - Click on the **Edit My Account** navigation button to make changes to the SRS Communicator account.

- **Change Email Address** - Click on the orange text to change the account's email address.
- **Change Password** - Click on the orange text to change the account's password.

Alerts are automatically sent to the account holder's email address to notify him/her when there are changes to the patient chart information. Click in the check boxes to make changes to the email alerts received.

Click on the **Manage Chart Access** navigation button; the screen displays allowing the user to remove a patient chart from the SRS Communicator account.

If the patient has **Patient Representatives** added those names would appear here.