

Patient Portal Set Up with Amazing Charts

You've successfully registered for the Amazing Charts Patient Portal powered by Updox! Take your first steps toward Stage 2 Meaningful Use with Amazing Charts. Launch Updox for the Amazing Charts Patient Portal using the links below where you will start customizing your portal.

Step 1: Updox User Mapping

1. Access the Updox web application using this web address: <https://Myupdox.com/ui/html#/>
2. Once logged in, click on the **Menu** button
3. Click on **Admin**
4. Click on **Users**, and click on the Account Holder's name (original user)
 - a. Click **Settings** (just to the right of User Information near the top)
 - b. Associate the Updox user with the Amazing Charts username under EHR User ID, Save
5. Click **New** near the bottom to create additional users – all users will require a first name, last name, username, and EHR user ID. Usernames are Updox-wide so "Admin" or "Nurse" might be taken. Be sure to hit save after user is created.

Step 2: Building the Patient Portal

1. Access the Updox web application by clicking the configured Secure button in Amazing Charts version 7 and above, or through <https://Myupdox.com/ui/html#/>
2. Once logged in, click on the **Menu** button
3. Click on **Admin**
4. Click on **Patient Portal** to build out your patient portal
 - a. On the **General tab**, you'll see your patient portal URL that patients will use to access any information you send. Select how interactive you'd like your patient portal to be by checking boxes. Note: For Meaningful Use Stage 2, at minimum you'll want to check:
 - i. Allow patients to create new messages
 - ii. Allow patients to reply to messages
 - iii. Allow patients to view records
 - b. On the **About Us tab**, you're able to provide contact information for your practice including phone, fax and email if you wish. You can also include general information about your practice in the About Us section (this is where practices with an existing website will provide the link to their site).
 - c. On the **Hours tab**, you're able to display your hours of operation.
 - d. On the **Portal Accounts tab**, if you want to invite any patient with an email address currently on file in Amazing Charts to the portal at once (and nightly as email addresses are added going forward), check "Automatically create Portal Accounts for Patients with an email address." If you plan to the invite patients individually either while they're in office or by sending their first message, leave that box unchecked.

Step 3: Amazing Charts User Mapping (for Amazing Charts Users 7.x Only)

1. Access the Updox web application using this web address: <https://Myupdox.com/ui/html#/>
2. Associate (i.e. map) Amazing Charts usernames with corresponding Updox usernames for those users who require Updox access. Note: Once the mapping is complete, you will not need to use the Updox login screen again although it will be there should you ever want to log into Updox separately from Amazing Charts.
 - a. Once logged in, open the **Menu** in Updox by clicking on the **Menu** button found on the top left corner of Updox. The menu will slide out from the left side of the screen.

- b. From the **Menu**, click on the **Admin** tab found in the top – right side of the menu. The Admin tab will display of list of your Admin features.
 - i. From the **Admin** menu select **AC User Mapping**.
 - ii. From the **AC User Mapping** screen, you will see the list of existing Amazing Charts users displayed down the left side of the screen. On the right side you will see a dropdown box beside each of the user’s names. This dropdown includes the existing Updox users. Select the corresponding Updox user for each of the Amazing Charts users you want to map. If you have Amazing Charts users that you don’t want to be able to use Updox, choose **None** from the dropdown.
6. Launch Updox for the Amazing Charts Patient Portal by clicking the Secure Chart button in Amazing Charts.
 - a. Enter Practice Credentials (Licensed Username, Licensed Password)

The credentials we are looking for after trying to link or create an account are the same credentials the client would use to access their Amazing Charts client portal account at www.amazingcharts.net/ac. If you are not sure of the email you can find this by going to the Practice Licensing Info section in the Amazing Charts Admin Options. If you are not sure of your password, you can reset it by going to www.amazingcharts.net/ac.

- b. As a new account, follow the instructions to Register and Select Domain name.
7. As a reminder, your first Amazing Charts Patient Portal user is the email address used to register for an Updox account. You will use the password you entered during the registration process.
8. To begin customizing your Patient Portal, see the **Building the Patient Portal** section.

Have questions?

- **Click** — Support Articles <http://updox.com/amazing-charts-patient-portal-support/>
- **Call** — (866) 382-5932 option 1