Table of Contents

Welcome
Overall Guidance
• How login with athenahealth works
• Understanding the account structure
• Updates to patient experience
• How to troubleshoot Patient Portal login issues
• When assisting patients with login issues
Supported browsers
Updated landing page
Workflow: Account upgrade
Workflow: Account registration via notification email
Workflow: Forgot password
Workflow: Reset account
Workflow: In-Office Registration using Kiosk or SMS
Welcome

Through feedback and refinement across thousands of users, we’ve designed the upgraded login workflows included in the Patient Portal Login Upgrade to be as intuitive and easy to navigate as possible. However, we understand there will always be some users that have difficulty accessing their Patient Portal account, so we’ve created this document to help you assist these patients. Even if your staff is well-versed in Patient Portal support, we strongly recommend reading the Overall Guidance section below, since the upgrade may impact your usual troubleshooting methods.

The rest of this document describes the new workflows (upgrading an existing account, registering an account for the first time, resetting a password, and resetting an account) in detail, with screenshots and additional troubleshooting tips for your reference.

Overall Guidance

How login with athenahealth works

The Patient Portal Login Upgrade establishes a single set of credentials (“athenahealth account”) for patients that they can use anywhere the Patient Portal Login Upgrade is enabled. On the Patient Portal, this is indicated by a blue “Log in with athenahealth” button on the landing page, replacing the former email and password fields. Currently athenahealth accounts can be used to access Patient Portals of organizations using athenahealth, as well as Health Records in the Apple Health app (if enabled for those organizations). Note that an athenahealth account is a universal credential but does not establish a universal portal: patients will still access each organization’s Patient Portal at the same landing pages as today.

Understanding the account structure

With this new login infrastructure, there is now a much clearer distinction between a user’s account (email and password) and that user’s Patient Portal access. Prior to the Patient Portal Login Upgrade, a patient’s account was one and the same with their Patient Portal access: Inviting a patient to create an account also granted them access to your organization’s Patient Portal, and revoking access to your Patient Portal entailed deleting that patient’s account. With a universal login, however, a patient’s athenahealth account exists separate from your organization, since the patient can use their athenahealth account for multiple portals or applications (patients can manage their athenahealth account through the “Password & Security” tab of any Patient Portal they use). Access to your organization’s Patient Portal, meanwhile, is still managed through the patient Quickview in athenaNet. In other words, when you send a patient an invitation to your Patient Portal, you’re granting permission for that patient to access your Patient Portal using their athenahealth account (if they don’t yet have an athenahealth account at that email address, they’ll register one using the invitation email you sent them). Conversely, deleting that patient’s “portal account” (specific to your organization, accessed through the “Manage portal account” button in the patient Quickview) does not delete the patient’s athenahealth account - it just revokes that patient’s access to your Patient Portal using that athenahealth account.

Updates to patient experience

In addition to “Log in with athenahealth” replacing the usual email and password fields on the Patient Portal landing page, patients will also be greeted by new workflows for registering, upgrading, and resetting their accounts. Previous Patient Portal users log in with the same email and password as before and are walked through upgrading those credentials upon their next login. Following the upgrade process to an “athenahealth account,” those users are able to log in with that same email and password wherever they see “Log in with athenahealth.” New users will simply create their athenahealth account when registering for your Patient Portal. The table below outlines the credentials and factors that patients will need (or create) to complete each of the new login scenarios. Definitions for these factors are available in the next section.
Later in this document we provide examples and screenshots of the most common workflows above, including screenshots.

### How to troubleshoot Patient Portal login issues

The password reset workflow should be the go-to troubleshooting option for users unable to access their Patient Portal. To complete this workflow, make sure the user can verify access to the following:

1. **Email address** associated with the user’s portal account in the patient Quickview (for family access accounts, click on the user in Quickview and click “Manage portal account”). If the user no longer has access to this address, their provider can delete their existing portal account in Quickview and send an invitation to re-register for the Patient Portal at a new email address. Please note when the user re-registers, they will also be creating a new athenahealth account, since each account is tied to a unique email address.
   - **Note:** Please be aware if you update a patient’s email address in Quickview, they’ll need to re-register to your organization’s Patient Portal at the new email address and will not be able to access that Patient Portal using the athenahealth account associated with the previous email address. An email invitation to the Patient Portal is automatically sent to the new email address when an email is updated for an existing portal user.

2. **Security option (either a recovery phone number or answer to a security question)** associated with the user’s athenahealth account. Users should have access to their recovery phone number or know the answer to their security question since they chose either method when creating their athenahealth account (either through initial portal registration or the account upgrade process for existing users). If a user is trying to reset their password and either no longer has access to their recovery phone or forgets their security question answer, they can click the “Cannot verify? Reset your account” link at the bottom of the page and follow the steps to set up a new security option and access their Patient Portal (the reset account workflow is outlined later in this document). **Note:** To limit liability, providers are unable to change this security option since the user’s athenahealth account may be linked to other providers and applications outside their organization.

3. **Phone number** associated with the user’s portal account in Quickview, used to confirm access to your organization’s Patient Portal. If the user no longer has access to this phone number, they must contact their provider to update the phone number on their portal account in Quickview. **The user will only be asked to verify this number once (unless they reset their security option)** - users who have verified access to this phone number previously (e.g. when setting up this same number as a recovery phone) will bypass this step. **Note:** Only the last 4 digits of this phone number are shown to the user. Therefore if a user recognizes the last 4 digits but reports they are not receiving texts/calls with their verification code, their provider should confirm with the user that their entire phone number is entered correctly in Quickview.
When assisting patients with login issues:

**DO**

- use the password reset workflow (click on the portal user in Quickview and click “Send password reset email”) when a patient forgets their password. Patients can also access this workflow themselves through the “Forgot password?” link at the bottom of the new login screen.
- use an in-office method (“Register with this computer”, “Register with Kiosk”, or “Register with Smartphone”) to delete and re-register a patient only if the patient cannot complete the password reset workflow. Unlike re-sending an email invitation, **re-registering by these methods also deletes and recreates the user's athenahealth account**, not just that account's permission to access your organization's Patient Portal (see Understanding the account structure). Therefore the user can set up a new password and security option as if registering an account for the first time; however this will also require the patient to re-verify access to the phone number associated with their portal account in Quickview.
  - **Note:** Account (re-)registration via in-office methods is intended to be completed in-person by the patient, and should not be used for remote troubleshooting without first verifying the patient's identity.
- verify the identity of the patient (or family member) before making any changes to the user's email, phone number on file, or when registering (or re-registering) them to your patient portal via in-office workflows (“Register with this computer”, “Register with Kiosk”, or “Register with Smartphone”). Identifying pieces of information the user can provide might include their physical address, date of birth, or Social Security number.
- update the phone number associated with the user's Patient Portal account if the user no longer has access to that phone number. **Note:** To view or edit the phone number on file for a family member's account, click on the portal user in the patient Quickview and click “Manage portal account.”

**DON'T**

- delete a user's portal account and send a new email invitation to the Patient Portal at the same email address (using “Send Email Invitation”). Doing so simply breaks and recreates the link between the user’s athenahealth account and your organization’s Patient Portal, and does not reset the user’s password or security options if the user is having difficulty with those credentials.

**Supported Browsers**

Login with athenahealth is supported for the following browsers, in addition to any integrated applications (e.g. Apple Health, if enabled by your organization). Users encountering login issues should confirm they are using one of these supported browsers before attempting to access their account.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Supported Versions</th>
<th>Current version (desktop and mobile)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer</td>
<td>11.0 and future versions</td>
<td>11.0</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>13.0 and future versions</td>
<td>13.0</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>30.0 and later versions</td>
<td>62.0.3202</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>.40 and later versions</td>
<td>56.0.2</td>
</tr>
<tr>
<td>Apple Safari</td>
<td>9 and later versions</td>
<td>11.0.1</td>
</tr>
</tbody>
</table>
Workflow: Account Upgrade

Below is the workflow for patients who already have a Patient Portal account with your organization and are being upgraded to a new athenahealth account via the Patient Portal login screen.

1. Your patient will log in with the same email and password they’ve previously used to log in to your Patient Portal. This begins the workflow to upgrade their account to a new athenahealth account. They can log in using this account anywhere they see the blue “Login with athenahealth” button. If they’ve forgotten their password, they'll use the “Forgot password” workflow (see workflow example later in this document).
Workflow: Account Upgrade cont.

2. Once your patient enters their email and password, they’ll be taken to a screen asking for confirmation to upgrade their account to an athenahealth account. Next, they’ll set up a security option, used to confirm their identity and recover their account if they forget their password. For their security option, they can choose to enter a phone number to receive a verification code via text message or phone call, or they can choose to set up a security question.

Notes:
- Setting up a security option is a one-time process, and the patient will be able to log in with just their email and password the next time they access their Patient Portal.
- If the user chooses to set up a recovery phone, this phone number is managed separately from the patient record phone, which is managed in the patient Quickview. Patients who no longer have access to their recovery phone or can’t remember the answer to their security question should consult the in-workflow help content for next steps (see section for “Resetting your password if you forgot it”), since their provider can’t edit their security option for them.
- By accepting the Terms and Conditions of Login with athenahealth, users acknowledge that they are at least 13 years of age, in compliance with federal privacy regulations.
Workflow: Account Upgrade cont.

Your patient is now all set with their upgraded athenahealth account! Going forward, they can use these same credentials wherever they see “Login with athenahealth.”

Workflow: Account Registration via Notification Email

Below is the workflow for patients who don’t have an athenahealth account and are registering for your Patient Portal for the first time via a notification email sent by your practice (e.g. an appointment reminder or lab result notification with a link to your Patient Portal).

1. Your patient will enter the registration workflow by clicking the Patient Portal link in the notification email (e.g. “View Results” for a lab result notification, as shown). They’ll then be asked to set their password and agree to the terms and conditions to create their athenahealth account.
Workflow: Account Registration via Notification Email cont.

2. Your patient is asked to set up a security option, used to confirm their identity and recover their account if they forget their password. For their security option, they can choose to enter a phone number to receive a verification code via text message or phone call, or they can choose to set up a security question.

Note: Setting up a security option is a one-time process, and the patient will be able to log in with just their email and password the next time they access their Patient Portal. If the user chooses to set up a recovery phone, this phone number is managed separately from the patient record phone, which is managed in the patient Quickview. Patients who no longer have access to their recovery phone number or can’t remember the answer to their security question should consult the in-workflow help content for next steps (see section for “Resetting your password if you forgot it”), since their provider can’t edit their security option for them.
Workflow: Account Registration via Notification Email cont.

3. If registering from a non-invite email (e.g. a lab result or appointment reminder), the user may be asked to confirm if they are the patient or if they are a parent/guardian managing the patient’s account. This determines whether the account is set up as a self-user or as a family access account in the patient Quickview in athenaNet.

Note: This step only applies to registration from a notification email, since with Patient Portal invitation emails you’ll already have assigned the patient relationship.

4. If the user selects “I manage [patient’s] account”, then the user will be asked to confirm their own name and date of birth to be associated with their login credentials. If the user reports they are under 13 years old, they’ll be instructed to contact your practice to set up a family access account for a parent or guardian.

If the user selected “I am [patient]”, they will bypass this step because their information is already on record in athenaNet.

Users who indicate that they are under 13 years of age will receive the following error:
Workflow: Account Registration via Notification Email cont.

5. To confirm the user’s access to the associated patient record at your practice, the user may also be asked to verify the phone number on file in the patient Quickview. This phone number only needs to be verified once, so users who set up the same phone number as their security option will bypass this step. The user can choose to receive a verification code via text message or phone call; a field will then appear where your patient can enter that code. Entering the code and clicking “Verify” completes the creation of their athenahealth account and registration to your Patient Portal.

Note: If the user is the patient, then the phone number on record for them is the phone number in the patient’s Quickview. If the user is a family member, then their phone number is recorded in the Portal Accounts page for that patient. To access the Portal Accounts page to view or edit the phone number on file for a family access user, click on the portal user in the patient Quickview and click Manage portal account. If your patient no longer has access to this phone number, you’ll need to update their number on file.

6. The user will now see the “All set” screen and is finished creating their athenahealth account! Clicking “Continue” on this screen will take the user into their Patient Portal. Going forward, they can use these same credentials wherever they see “Log in with athenahealth.”
Workflow: Forgot Password

Below is the workflow for patients who have already registered (or upgraded to) an athenahealth account and have forgotten their password.

1. If a patient forgets their password to log in to the Patient Portal, you can send them a link to reset their password by clicking “Send password reset email” in the patient’s Quickview. The patient should receive the email within a few seconds. Clicking the link within will take them to the “Create your new password” page below. Note that the patient could also send a password reset link to their email by clicking “Forgot password?” on the Patient Portal login page and entering the email address associated with their account.

Your patient will then enter their new password and click “Save and continue” to confirm it.
Workflow: Forgot Password cont.

2. The patient will be asked to confirm the security option they chose during account setup, either by entering a code received via text message or voice call, or by answering their security question. The patient will click the “Text” or “Call” button to receive and enter their verification code, or will fill out the answer to their security question. Note that security questions acknowledge spaces and special characters, but ignore capitalization. After completing this step and clicking “Verify,” the patient will be taken to their Patient Portal home page. If the patient cannot complete this step (either by losing access to their recovery phone or forgetting the answer to their security question), they can click the “Cannot verify? Reset your account” link at the bottom of the page. Clicking this link walks the user through the account reset process described in Workflow: Reset Account below.

*If the user has a recovery phone as their security option:*

Or, if the user has a security question as their security option:
Workflow: Reset Account

Below is the workflow for patients who cannot verify their security option (either by losing access to their recovery phone or forgetting the answer to their security question) and must reset their account to access the Patient Portal.

1. When resetting their password, your patient will be asked to verify the security option they previously set up when registering/upgrading their account. The patient will be prompted either to receive a verification code by text message, receive a verification code by phone call, or enter the answer to their security question (see steps 1 and 2 of Workflow: Forgot Password above). If the patient can’t complete this step, they can click the “Cannot verify? Reset your account” link at the bottom of the page. Clicking the link surfaces a warning to the patient that they will effectively recreate their account by proceeding with account reset, which may require them to verify access to their phone number on file (see step 3 of this workflow).

2. Clicking “Reset My Account” initiates account reset, which may take up to a minute to complete (as indicated by the warning and loading icon at the top of the page). The “Reset My Account” button will be faded and unclickable while the patient’s account is rebuilt.


**Workflow: Reset Account cont.**

3. Once the patient’s account is rebuilt, the patient will automatically be taken to a page asking them to create a new password. This step and the following steps are nearly identical to account registration (see Workflow: Account Registration via Notification Email) because the patient is effectively setting up a new athenahealth account under the same email address they’ve used to access the Patient Portal previously. After the patient clicks “Save and continue”, they will set a new password, and then need to accept the terms and conditions to recreate their athenahealth account. Clicking “Continue” takes the patient through setup of their new security option and has them confirm their personal details (see steps 2 through 4 of Workflow: Account Registration via Notification Email). To confirm the user’s access to the associated patient record at your organization, the user may also be asked to verify the phone number on file in the patient Quickview (see step 5 of Workflow: Account Registration via Notification Email) before proceeding into the Patient Portal.

1. Security option setup (recovery phone or security question)

2. Verify access to patient record*

3. All set! (patient is taken to their Patient Portal home page)

*The user will only be asked to verify this number once - users who have verified access to this phone number previously (e.g. when setting up this same number as a recovery phone) will bypass this step.
Workflow: In-Office Registration using Kiosk or SMS

Below is the workflow for in-office portal registration using Kiosk or SMS. Kiosk and SMS differ from other registration methods in that they both generate a temporary passcode for the patient to access the Patient Portal. The other in-office registration method, “Register with this computer,” behaves exactly like registration from a portal invitation or notification email (see Workflow: Account Registration via Notification Email) except that it’s performed on the same computer from which their provider initiated registration.

1. The patient’s provider initiates registration by clicking either “Register with Kiosk” or “Register using Smartphone” in the patient Quickview, and is then shared with the patient. Note: You cannot invite or register a patient under the age of 13 for the Patient Portal, in compliance with federal privacy regulations.

2. The patient will navigate to the Patient Portal landing page and log in with their email and temporary passcode. The patient is then taken to a screen asking for confirmation to upgrade their account to an athenahealth account.

3. Clicking “Continue” on the previous screen takes the patient through setup of their new security option. This step is identical to setting up a security option via other registration methods (see step 2 of Workflow: Account Registration via Notification Email).
Workflow: In-Office Registration using Kiosk or SMS cont.

4. The user will then need to create their new password by re-entering their temporary password and setting a new one.

5. The patient will now see the “All set” screen and is finished creating their athenahealth account! Clicking “Continue” on this screen will take the user into their Patient Portal. Going forward, they can use these same credentials wherever they see “Log in with athenahealth.”