

Please follow below 6 steps to sign up patientall.com site and use the online appointment request with Xuan L. Chang.

Step 1: Logging in to the site

To begin, connect to www.patientally.com. This web site is best viewed with **Internet Explorer 7** or **Mozilla Firefox 3** and above.

The screenshot shows the Patient Ally website home page. At the top is the Patient Ally logo and a navigation bar with links: Home, About Us, Features, Contact Us, Sign Up. Below the navigation bar is a "Welcome to Patient Ally" section. On the left is a photo of a family. In the center, text describes the service as a free, internet-based Personal Health Record management system. Below this is a "Sign Up Now to get started" button. On the right is a "Members Login" section with fields for Username and Password, and a "Log In" button. Below the login section is a "SIGN UP NOW!" button. Further down, there is a "Key Features" section with a bulleted list of services, a "FLU.GOV" banner, and an "EHNAC Accredited - Safe and Secure" section with the EHNAC logo and text explaining the accreditation.

Below is the information presented in the link [About Us](#) :

The screenshot shows the Patient Ally website "About Us" page. At the top is the Patient Ally logo and a navigation bar with links: Home, About Us, Features, Contact Us, Sign Up. Below the navigation bar is the "Our Mission" section. On the left is a photo of a doctor and a woman. In the center, text describes the mission to eliminate inefficiency in the medical process. Below this is a paragraph explaining how Patient Ally offers a solution by saving records online and providing a communication system. Further down, text states that the service is free and offers various benefits like online medical profiles, lab results, and appointment requests. The page concludes with a statement of the goal to improve the speed and communication between providers and patients.

Below is the information presented in the link.



[Home](#) [About Us](#) [Features](#) [Contact Us](#) [Sign Up](#)

Patient Ally Features



- **Pre-built Forms:** Fill out all the forms you need once, and never fill them out again.
- **Appointments:** Request, reschedule and cancel appointments with your provider online.
- **Inbox:** Communicate with your provider(s) through Patient Channel using Patient Ally's internal Inbox.
- **Document Center:** Upload all medical documents once, and use the inbox to send the documents to your providers.
- **Laboratory Results:** View the latest lab results from your provider from your PC, anytime and anywhere.
- **Vitals:** View the latest vitals in charts from your doctor visits, or enter and keep track of your own vitals. A Health opinion system will give you recommendations based on your vital history.

Best of All, It's Completely Free! [Register today](#) and save time on what matters!

The web site is best viewed with Internet Explorer 7 or Mozilla Firefox 3 and above.

[Home](#) | [Terms and Conditions](#) | [Privacy](#) | [Contact Us](#)
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Step 2: Click on the link or the button to sign up.

SIGN UP NOW!

on the landing page and complete the screen to create a user name and request a password.



[Home](#) [About Us](#) [Features](#) [Contact Us](#) [Sign Up](#)

Create a new account

Note: All fields are required

Username: min. 5 characters

Email:

Security Question:

Security Answer:

Last Name:

First Name:

Date of Birth: e.g. mm/dd/yyyy

Gender:

The Security Question and Security Answer will be used to authenticate for lost passwords.



Enter the code shown

I have thoroughly read and accept the [Terms of Use and Agreement](#)

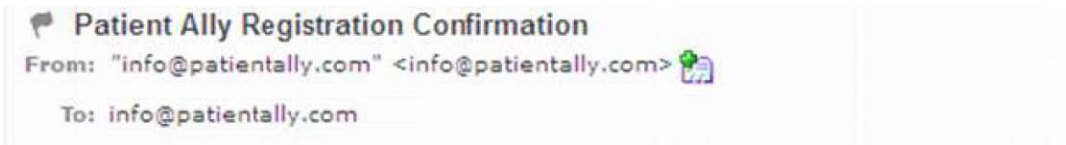
[Create Account](#)

The web site is best viewed with Internet Explorer 7 or Mozilla Firefox 3 and above.

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An email will be sent containing a temporary password, which will allow a log in to Patient Ally with the user name created. The email will advise to change the password once logged in.

NOTE: The password is case sensitive, and it is suggested that temporary password is copied from the email, and then pasted into the password box in the member's login, as shown in red in the illustrations below .



Congratulations! You have successfully created a new account with Patient Ally.

Please visit <http://www.PatientAlly.com> and enter the following information to log on:

Password: Z&e8aF3= Copy the password (Highlight password, right click and select 'Copy')

The password above has been automatically created and is only temporary. Use the username you created then be prompted to change your temporary password to a new password (min. 8 characters).

If you have any questions email us at info@PatientAlly.com or call us at 888-PHR-4ALL.

Thanks and welcome aboard the Patient Ally Community!

The Patient Ally Team



Step 3: Completing the Patient Profile

Once logged in, complete the personal profile with tabs for General demographics, Insurance information, Pharmacies and Forms (health records). The General page is displayed here

Profile - Nancy W

General Insurance Pharmacies Forms

Patient Information

Last Name:	Willis	First Name:	Nancy	MI:	M	Suffix:	
DOB:	1/22/1900	Gender:	Female	SSN:			
Blood Type:	O+	Weight(kg):		Height(om):			
Marital Status:	Single	Emp Status:	Employed	Professional Title:			
Country:	USA	Ethnicity:	White/Caucasian	No. of Children:			

Contact Information

Address:	16703 SE McGillivray				
City:	Vancouver	State:	WA	Zip:	98683
Home Phone:		Work Phone:	866-575-4120	Work Ext:	228
Cell Phone:		Fax:		Email:	

Employer Information

Name:		Phone:		Occupation:	
Address:					
City:		State:		Zip:	

Emergency Contact

Contact Name:		Relation to Patient:			
Address:					
City:		State:		Zip:	
Home Phone:		Work Phone:		Cell Phone:	

Save

Step 4: Completing Insurance Information

The insurance page will require information about your insurance coverage. If the patient is a dependent on someone else's insurance, change the Patient Relationship from Self to the appropriate relationship using the drop arrow, and complete the information regarding the insured party.

Profile - Nancy W

General Insurance Pharmacies Forms

Primary Insurance

Ins. Name:	Aetna	Subscriber ID:	W12345678
Group No.:	87654321	Plan Name:	Open Access
Patient Relationship To Primary Insured:	Self or than Self, Please Fill out Primary Insured Section		

Secondary Insurance

Ins. Name:		Subscriber ID:	
Group No.:		Plan Name:	
Patient Relationship To Primary Insured:	or than Self, Please Fill out Secondary Insured Section		

Save

Note: If you have Insurance please make sure that you fill in your insurance information before you add Xuan L. Chang as your new provider to your profile.

Step 5: Adding a Patient Ally Provider to your profile

- Move the mouse pointer over My Providers, and click Manage Providers from the drop menu
- Click on 'Add New Provider'
- You will have an opportunity to add your provider(s) to your personal health record.
- To search for a provider in the network, enter the search criteria known about the provider such as "City Name: **San Diego**", "State: **CA**", "Last Name: **Chang**".
- A list of the providers in the network that meet the chosen criteria will be displayed
- Click 'Select' the "Xuan L. Chang" from the list.
- A pop up window will ask you for the 'Provider ID Security Code'. Please enter "**104221**" for **Xuan L. Chang** as your new provider.
- You will need to agree to the terms of the Agreement. Scroll and read the Agreement, then click 'Yes, I Agree' at the bottom of the Agreement.

Current Profile | Nancy W | Messages (0) | eVisits (0) | Log Out

Home Profile Healthcare Requests Test Results **My Providers** Resources

Providers - Nancy W

Provider	Type	Address	Specialty	Contact	Edit
<input type="checkbox"/> Willis ABC, Nancy	PM/EHR	32356 So Coast Hwy	225100000X	999-999-9999	
<input type="checkbox"/> Stokes MD, Frank J	PM/EHR	5478 Palm Dr.	Internal Medicine	777-777-7777	
<input type="checkbox"/> Tech, Office Ally	PM/EHR	17005 se 8th st.		--	

Select/Unselect All [Add New Provider](#) [Delete Provider\(s\)](#)

Providers - Nancy W

Add Providers

In order for your provider to link you to their records, you must have your Last Name, First Name, Date of Birth and Gender entered on your profile page. [Click here to edit your profile.](#)

To find your Provider in the Network, fill in the values below. If you do not locate your Provider in the Network, you can [Add a Provider not in the network](#)

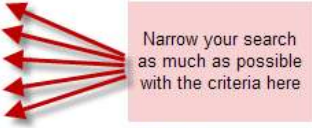
City Name:

State:

Zip Code:

Last Name:

First Name:



Narrow your search as much as possible with the criteria here

Search

Providers - Nancy W

Add Providers

In order for your provider to link you to their records, you must have your Last Name, First Name, Date of Birth and Gender entered on your profile page. [Click here to edit your profile.](#)

To find your Provider in the Network, fill in the values below. If you do not locate your Provider in the Network, you can [Add a Provider not in the network](#)

City Name:

State:

Zip Code:

Last Name:

First Name:

Note: shown below is the top 100 providers that match your search criteria.

	Provider	Address	Specialty	Contact
Select	David Smith	323 Pacific Coast Hwy Laguna Beach, CA 92651		949-464-9129
Select	Joe T Surescripts	32356 S. Coast Highway Laguna Beach, CA 92651	Family Practice	949-464-9129
Select	Johnny O Tester	Testing Account Laguna Beach, CA 92651	Anesthesiologist	123-456-7890

Search

Please enter the security code provided by your physician in order to request to be linked. If you do not have a security code, please call your provider to obtain one.

Provider ID Security Code:

Submit

Provider Agreement
To add a provider, you must have read and agree to the following terms:

Patient Ally Legal Terms and Notices

Welcome to the Patient Ally web site. Please review the following terms and conditions concerning your use of the Web Site. By accessing, using or downloading any materials from the Web Site, you agree to follow and be bound by these terms and conditions (the "Terms"). If you do not agree with these Terms, please do not use this Web Site.

GENERAL USE PROVISIONS

[Print](#) [Yes, I agree](#) [No, I do not agree](#)

Note: Xuan L. Chang will notice you by message or email within two business days. After receipting response from Xuan L. Chang you will be able to use the online appointment request with her.

Step 6: Requesting Appointments

- From the menu bar under Healthcare Requests, select Appointments.
- Click Schedule an Appointment.
- When the Appointment Calendar appears, select the Provider you would like to see, and the office location, on the right side of the screen. The Appointment calendar will update to reflect available times for your selections. Refer to the Color Legend in the lower right corner.
- Click on the cell for the date and time that you would like to schedule your appointment.
- Complete the Appointment Request, and click Update.
- Your provider will receive your request, and respond to you via Patient Ally. To retrieve your messages, from the menu bar under Healthcare Requests, select Messages.
- Click on the message you want to open.
- Your provider may confirm your appointment, or inform you of a reschedule to a different time, so please read the message carefully.
- Once your appointment has been confirmed, you will see the Color Legend change on the appointment calendar.
- You will also see the upcoming appointment listed in the Appointments link under Healthcare Requests in the menu bar. From here, you may use the links to request a reschedule of the appointment, or to cancel.



[Messages \(0\)](#) • [eVisits \(0\)](#)

Profile Healthcare Requests Test Results My Providers Resources

Messages

eVisits Messages

Appointments

Document Center

Submit Health Forms

Prescription Refills

Create eVisit

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elow are quick links to some of the more

- [Send Provider Messages](#)
- [Submit Health Forms](#)
- [Request Prescription Refills](#)

Upcoming Appointments - Nancy W

[Reschedule](#) [Cancel](#)

Tuesday, January 19, 2010 at 10:30:00 AM with Provider Office Ally Technical Support01 at 5 Coast Hwy.

[Schedule an Appointment](#)

5 Coast Hwy

Mon: 01/18/2010 Tue: 01/19/2010 Wed: 01/20/2010

Reserved

office visit

Select Provider here

Select Location here

After selecting the provider and location, click on the cell for the date and time you are

Close Calendar

[Nancy Willis - click to change](#)

Nancy Willis's Providers

- Nancy Willis ABC (2251000000)
999-999-9999
- Frank Stokes MD (Internal Medicine)
777-777-7777
- Office Ally Tech ()

Offices

- 5 Coast Hwy
12692 So Coast Hwy
Laguna Beach CA 92651
- Patient Ally
123 Main St Anywhere
WA 99999

Color Legend

- Non-Business/Unavailable
- Available for Appointment
- Unavailable Time Slot
- Not yet confirmed
- Confirmed by Provider

Appointment Request

You have selected Office Ally Technical Support01 - S Coast Hwy at 1/19/2010 10:30:00 AM

Contact Number:

Reason for Visit:

Additional Notes:

19

Profile Healthcare Requests Test Results M

Messages

eVisits Messages

Appointments

Document Center

Submit Health Forms

Prescription Refills

Create eVisit

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Information
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My Inbox - Nancy W

Messages

Inbox

Drafts

Archived

Sent

Autorefresh: off

Search:

	From	To	Subject	Date	Date
<input type="checkbox"/>	Office Ally Technical Support01	Nancy M Willis;	Re: Request an Appointment	1/14/2010 10:56:50 AM	1-14-2010
<input type="checkbox"/>	Office Ally Technical Support01	Nancy M Willis;	Re: Request an Appointment	12/8/2009 1:53:22 PM	12-08-2009
<input type="checkbox"/>	Office Ally Technical Support01	Nancy M Willis;	Re: Request an Appointment	11/23/2009 4:29:28 PM	11-23-2009

My Inbox - Nancy W

Messages Reply All Forward Cancel

To: Nancy M Willis; Received on: 1/14/2010 10:56:50 AM

From: Office Ally Technical Support01

Contact Number:

Subject: Re: Request an Appointment

Attachments: [\(Add Attachments\)](#)

Message:
 Office Ally Technical Support01 has confirmed your appointment on 1/19/2010 at 10:30 am at S Coast Hwy office for visit reason office visit ----- Original Message - from Willis, Nancy (Patient ID 13991799) ----- Patient has requested to schedule a new appointment at 1/19/2010 10:30:00 AM with provider Office Ally Technical Support01 for reason office visit Contact number is: 866-575-4120
 Additional Notes: test ----- Original Message -----

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777-777-7777
Office Ally Tech ()

Offices

- S Coast Hwy
32602 So Coast Hwy
Laguna Beach CA 92651
- Patient Ally
123 Main St Anywhere
WA 99999

Color Legend

- Non-Business/Unavailable
- Available for Appointment
- Unavailable Time Slot
- Not yet confirmed
- Confirmed by Provider

Upcoming Appointments - Nancy W

[Reschedule](#) [Cancel](#) Tuesday, January 19, 2010 at 10:30:00 AM with Provider Office Ally Technical Support01 at S Coast Hwy.

[Schedule an Appointment](#)

Step 7: Navigating the Patient Ally website

- From the Home page, use the navigation bar at the top of the screen or the quick links in the body of the page to access/update information and make requests within the Patient Ally channels, as shown below.

- Each of the links in the navigation bar reveals options.
- Patient Profile contains the General, Insurance, Pharmacy and Forms tabs
- My Family contains access to any additional family member profiles
- Add Family Member allows the user to add a family member profile
- Print Medical History allows the user to export information from the profile tabs
- Settings allows the user to Change Password, Change Email Address or Change the Security Question and Answer
- Messages accesses the Patient Ally Inbox, where messages may be read or composed and sent on the secure channel
- eVisits Messages contains results (responses from providers) from eVisits
- Appointments allows the user to schedule and view upcoming appointments
- Document Center contains the Forms completed by the user and any other documents uploaded by the user
- Submit Health Forms allows the user to send documents via the Patient Ally Inbox secure channel to others
- Prescription Refills allows the user to request refills from their providers
- Create eVisit allows the user to start a New eVisit and review the eVisit History
- Laboratory allows the user to view Lab Results
- View Vitals allows the user to view Vital signs in graph form over time, and gives a provider and Ideal Life Summary
- Manage Providers allows the user to add or delete providers from the list and to edit nonPM/EHR providers they have added
- Submit Health Forms allows the user to send documents via the Patient Ally Inbox secure channel to others
- News/Updates contains messages from the Patient Ally Team regarding changes and news
- Feed back allows the user to comment or send suggestions or issues to us

Home - Nancy W

Welcome Nancy!


Thanks for using Patient Ally. Your membership is important to us, if you have any questions or suggestions please use our [Feedback Form](#).

Located above is the navigation menu. Using this menu you can reach each individual page. Below are quick links to some of the more commonly used features.

- [Update Personal Information](#)
- [Add a Family Member](#)
- [Make an Appointment](#)
- [Send Provider Messages](#)
- [Submit Health Forms](#)
- [Request Prescription Refills](#)

Reminders

There are no pending reminders.

 You have filled out **51%** of your Patient Demographics. [Don't remind me again.](#)

Upcoming Appointments

Tuesday, January 19, 2010 at 10:30:00 AM with Provider Office Ally Technical Support01 at S Coast Hwy. [Reschedule](#) [Cancel](#)

Winter Travel



Healthy Travel this Winter ~ Wherever you may be going this winter, protecting yourself and others from flu is more important than ever. CDC is making the case for healthy travel by sharing some tips for staying healthy while you travel during the winter months. ...[read more](#)

Physical Activity



Be Physically Active in the New Year ~ There is no need to think of strenuous exercise or boring workouts, instead do the fun activities you enjoy and watch the health benefits that follow!...[read more](#)

Got Diabetes?



Control Diabetes Before & During Pregnancy ~ Diabetes is often detected in women during their childbearing years and can affect the health of both the mother and her unborn child. Poor control of diabetes in a woman who is pregnant increases the chances for birth defects and other problems for the baby. It might cause serious complications for the woman, also. Proper health care before and during pregnancy will help prevent birth defects and other poor outcomes, such as miscarriage or stillbirth. ...[read more](#)

Profile

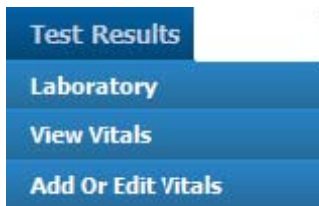
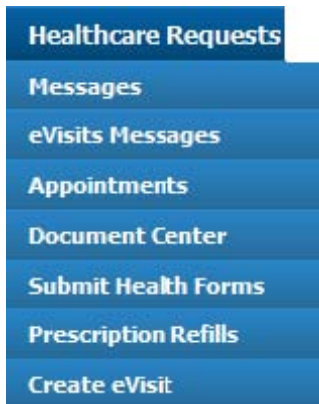
Patient Profile

My Family

Add Family Member

Print Medical History

Settings



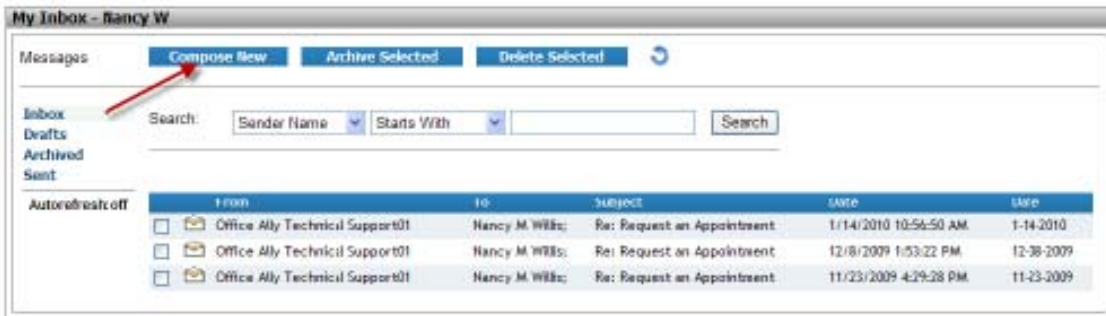
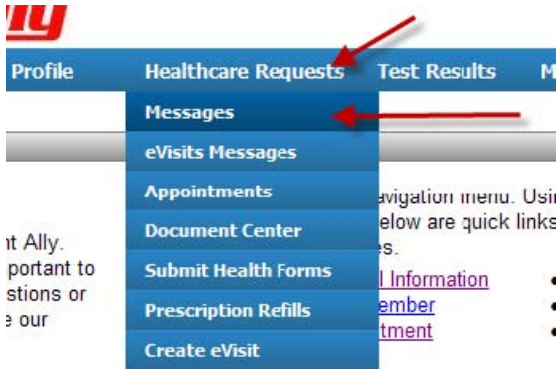
Patient Ally Help: www.info@patientally.com 8667474255 12

Step 8: Sending and Receiving Messages

To send a message to your provider, within the secure communications channel your provider must be registered in the Patient Ally network. Refer to the instructions above regarding Adding a Provider for details.

- To send a message to your provider access the Healthcare Requests link and select Messages.
- You will see your Inbox, which will display all received messages. Click the Compose New button to create a new message.
- In the Messages screen, click the link for Add/Change Recipients, and select your provider from the list.
- Remember your provider must be registered in the Patient Ally network to access the secure communications channel.

- Complete your message, attaching any appropriate documents that are stored in your computer.
- Click the Send button to finish your message and send to the recipient.
- Replies you receive from your message will arrive in the same area of Patient Ally. Access the Healthcare Requests, Messages link in the menu bar to view them.
- To send a reply to your incoming message, or to forward the message to others, open the message and click on the icons above the message



My Inbox - Nancy W

Messages [Address Book](#) [Save Draft](#) [Send](#) [Cancel](#)

To: [\(Add/Change Recipients\)](#)

From: Nancy Willis

Contact Number:

Subject:

Attachments: [\(Add Attachments\)](#)

My Inbox - Nancy W

Messages [Cancel](#)

To: Nancy M Willis Received on:
1/14/2010 10:56:50 AM

From: Office Ally Technical Support01

Contact Number:

Subject: Re: Request an Appointment

Attachments: [\(Add Attachments\)](#)

Office Ally Technical Support01 has confirmed your appointment on 1/19/2010 at 10:30 am at S Coast Hwy office for visit reason office visit ----- Original Message - from Willis, Nancy (Patient ID 13991799) ----- Patient has requested to schedule a new appointment at 1/19/2010 10:30:00 AM with provider Office Ally Technical Support01 for reason office visit Contact number is: 866-575-4120

Message: Additional Notes: text ----- Original Message -----