



Patient Portal How-To

Welcome to the California Center for Functional Medicine's Patient Portal, also known as the EHR.

You can think of your Patient Portal as an electronic version of your doctor's office chart, which also contains valuable information about your treatment and provides you with an easy way to ask questions and schedule appointments. Your Portal is the central dashboard for your care with us.

When you log in, you will always see the navigational menu at the right of your screen:

You are now logged into the Patient Portal

Welcome to the Patient Portal, where you can view or update your records and easily and securely communicate with California Center for Functional Medicine. Use the links provided to:

- View or change your contact and insurance information
- Use the secure messages system to communicate with your medical provider
- Schedule a medical appointment
- View your medications and request refills
- View or update your allergies and intolerances
- View and update basic vitals like blood pressure and weight
- Designate a preferred pharmacy

We encourage you to have a look around to make sure that your information is up-to-date.

If you have any comments or suggestions for improvement, please contact us at support@md-hq.com

Go to...

-  My Account Details
-  Secure Messages
-  Questionnaires
-  Request Appointment
-  Labs & Documents
-  My Vitals
-  My Medications
-  My Supplements
-  My Pharmacies
-  Encounter History
-  Log Out



My Account Details

MY ACCOUNT DETAILS

This section contains all of your basic demographic information. You can view or change your contact and insurance information here. Please take a moment to upload a photo of yourself so we can get to know you better.



Secure Messages

SECURE MESSAGES

Secure messages function just like e-mail – they are messages between you and our staff, and you can always go back to view your previous messages and our responses.

You can use secure messages to:

- Ask questions about a medication, supplement or diagnostic test recommended by a CCFM clinician.
- Submit requests to refill a medication or supplement.
- Let us know about possible side effects of a treatment.
- Respond to a question from a CCFM clinician or staff member.
- Send us notes concerning scheduling, canceling or changing an appointment.

Please note that Secure Messaging should be used for non-urgent messages, as it may sometimes take 2-3 working days for a response.

To send us a message, simply click the

[SEND A SECURE MESSAGE!](#)

and start a message. When we have responded, you will receive a notification to the e-mail address on file letting you know to log back into your Patient Portal to view the response.



Questionnaires

QUESTIONNAIRES

New patients will have forms that need to be completed at least 48 hours prior to your new patient appointment. Your clinician may also ask you in the future to fill out a follow-up survey to assess improvement in particular areas. If you see anything here, simply click the

[+ REVIEW AND SIGN](#)

or

[+ TAKE THE SURVEY](#)

next to the name of the questionnaire. When you're finished, you'll click

[SUBMIT THIS FORM](#)

Please keep in mind that once you begin, you cannot save the questionnaire and come back later to finish or edit it, so we recommend that you open it up, review the questions to make sure you have all the information you'll need to fill it out and then complete it.



Request Appointment

REQUEST APPOINTMENT

After you are an established patient, you can easily schedule follow-up appointments here, as well as cancel or reschedule an existing appointment. You select the duration of the appointment, your clinician and the date/time that is convenient for you. Please note, the calendar is only open for appointments for the next month or month-and-a-half at a time. If you ever see a message that says, "Service is currently not available," it is because there are no available appointments with your clinician, or the calendar is not yet open that far in advance for you to schedule an appointment. You can check back here as often as you like to see if there have been any cancellations.



Labs & Documents

LABS & DOCUMENTS

There are many functions of this section, including uploading documents for your clinician, viewing prescriptions, reviewing lab test results, viewing estimates and reading handouts from your clinician. Please note, if you do upload documents, they must be in PDF format.

Please follow the steps below in order to upload your document/test results to your Patient Portal:

1. While logged into the Patient Portal, click on the blue “Labs & Documents” button on the right-hand side of your screen.
2. Next, please click on the green “upload new document” button in the middle of the screen.
3. Next, fill in a name for your document (such as “VCS Test”), and then click on the “choose file” button to select the file from your computer that you want to upload.
4. Finally, click on “save document.”



My Vitals

MY VITALS

This is where you can record your blood pressure, weight and height, and update any changes to this information over time.



My Medications

MY MEDICATION

This section contains a list of medications that one of our clinicians has prescribed for you or that we have in your history, as well as any refill requests recently submitted via the Patient Portal.



My Supplements

MY SUPPLEMENTS

This section contains a list of your supplements. Clicking on the name of a supplement shows you the brand name, as well as general dosage/timing instructions. If your clinician has recommended different dosage/timing instructions during an appointment or via any responses in Secure Messages, please follow the clinician's instructions instead.

Note: If you want to re-order any supplements, please use Secure Messages to let us know which supplements you are in need of and how many of each you would like to order. We will charge the credit card on file and ship to the address on file, so please let us know in your message if this information has changed. It does reduce your shipping costs to place supplements orders all at once instead of one at a time.



My Pharmacies

MY PHARMACIES

Set preferred pharmacies here to make it fast and easy for us to call in your prescriptions and to prevent mix-ups. You can remove a pharmacy from the list, change your primary pharmacy, or add a new preferred pharmacy using the buttons provided.



Encounter History

ENCOUNTER HISTORY

This section contains notes, each of which summarizes an appointment or conversation with your clinician. A summary might include the clinician's assessment (diagnosis), new or modified prescriptions, orders or laboratory requests, as well as a list of suggested instructions for you. Once your clinician marks a summary as "complete," it will automatically appear on the list below. If supplements were recommended, you will also find dosage/timing instructions here.