



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

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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.



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.



Labs & Documents

LABS & DOCUMENTS

There are many functions of this section:

- Upload documents for your clinician
- View prescriptions
- Access test requisitions
- Read detailed information about tests ordered for you
- Monitor whether or not we have received results for tests you have completed
- Review lab test results
- Read handouts from your clinician

The Open Orders and Test Details box lists all tests that have been ordered for you. Clicking on the test name will show detailed information for each test, including the type of test, how you will get the test, how to prepare for the test, and payment and results information. Once we receive the results, the test name will disappear from this list, which allows you to easily keep track of what we have (or have not) received.

Please note, if you upload documents, they must be in PDF format.



Questionnaires

QUESTIONNAIRES

Any forms you need to complete will be shown in this section. Forms need to be completed at least 48 hours prior to an appointment. 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](#)

Once you begin a form, you can save the questionnaire and come back later to finish or edit it. Please keep in mind that once you submit it, you cannot come back later to finish or edit it, so we recommend that you review your answers thoroughly before you submit it.



Appointments

APPOINTMENTS

You can easily schedule 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, but the next month will open on the 20th. You can check back here as often as you like to see if there have been any cancellations.



Payments & Invoices

PAYMENTS & INVOICES

This billing section allows you to see your current balance, add/edit your credit cards on file, review your estimates, and download insurance invoices and receipts. If you have any questions about charges shown here, please use a Secure Message to contact us.



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.



CALIFORNIA CENTER *for*
FUNCTIONAL MEDICINE



My Medications

MY MEDICATIONS

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 Pharmacies

MY PHARMACIES

Set preferred pharmacies here to make it fast and easy for us to send 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.



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 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.