

## Staff Instructions For the Patient Portal (CEHR)

### Overview of Steps:

1. [Primary clinician generates a PIN number in CHIP.](#)
2. [Primary clinician prints the CEHR instructions in CHIP and gives it to the consumer. The instructions contain the consumer's PIN number, case number and the CEHR website address.](#)
3. [The consumer uses the instructions, PIN number and case number to create a user account on the CEHR website. The consumer must select a username and password when creating the CEHR account. After creating the CEHR user account, the consumer will no longer need the print out containing their PIN number and case number.](#)
4. [The consumer uses their username and password to login to the CEHR website for all future visits to the site.](#)
5. [Troubleshooting common problems consumers may encounter.](#)
6. [View of CEHR website.](#)

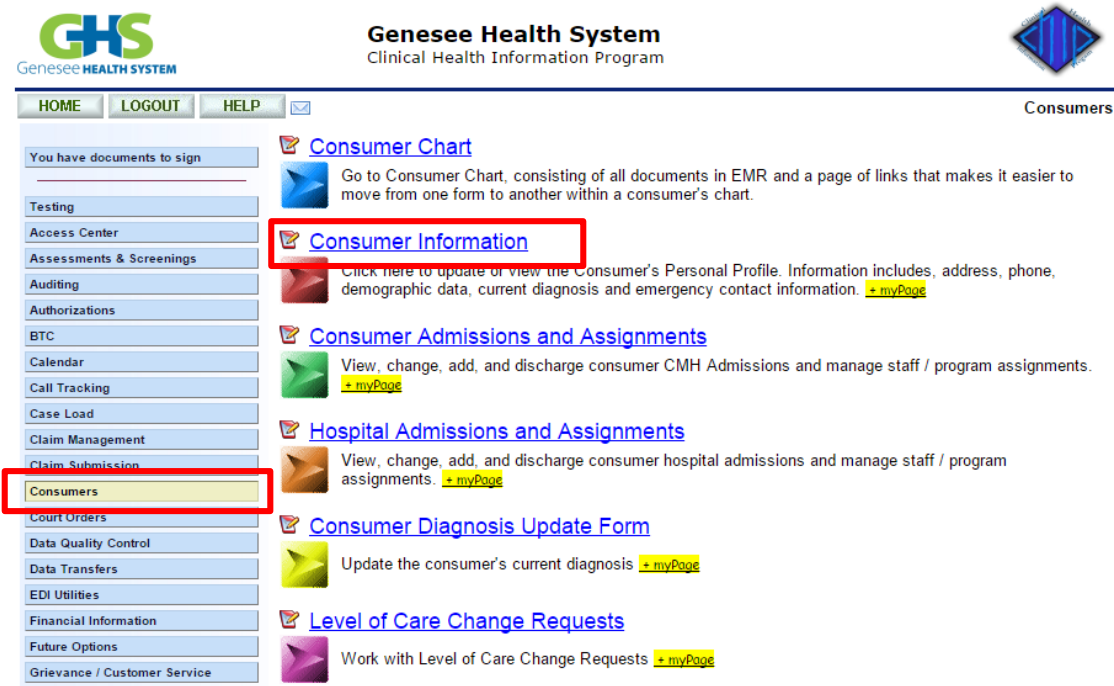
**Note:** Primary clinicians can direct consumers to customer services for problems with their CEHR accounts. The customer service number is (810)257-3705.

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## Detailed Instructions:

### 1. Primary clinician generates a PIN number in CHIP.

- a. Click on '**Consumers**' menu button on the left hand side of the screen; then click on '**Consumer Information**' link.

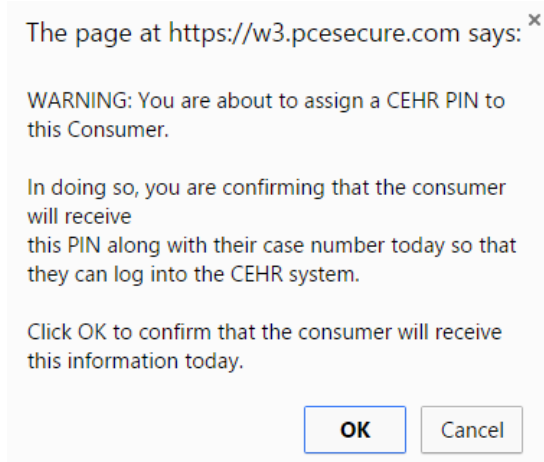


- b. Search for your consumer on the **Consumer List** screen. Click on the **change** link next to the consumer record needed.
- c. On page **1. Basic information**, scroll down to the bottom of the page to the **Community Electronic Health Records (CEHR)** section.
- d. Click on the **Update CEHR Information** link. This will open a pop-up window.

Community Electronic Health Records (CEHR)	<a href="#">Update CEHR Information</a>
Date CEHR PIN was offered to or requested by Consumer	CEHR PIN

- e. On the **Update CEHR Information** pop-up window, enter the date the PIN and instructions were given to the consumer, then click the **Generate PIN** link.
- f. A warning message will be displayed after clicking the **Generate PIN** link. The warning message states the consumer will receive their PIN and the CEHR instructions today. Click **Ok**.

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- g. After the warning message disappears, the PIN number will appear on the **Update CEHR Information** window. Click the **Save** button at the bottom of the window.

2. **Primary clinician prints the CEHR instructions in CHIP and gives it to the consumer.**

- a. The **Print Instructions** link is now available on the **CEHR** section of page **1. Basic Information**; click the **Print Instructions** link.



- b. A window will display the CEHR instructions. Print the instructions and hand them to the consumer.
- c. The image displayed below is an example of the printed instructions the consumer will receive. It contains the CEHR website address, their case and PIN number.

# Staff Instructions For the Patient Portal (CEHR)

## Community Electronic Health Records (CEHR) Creating an Account

### Instructions

- 1.) Do not give your PIN to anyone you do not trust
- 2.) If you lose these instructions, notify your case manager immediately
- 3.) Go to the CEHR website: **www.mycehr.com**
- 4.) Create a new account by clicking the 'Get Started' Button
  - a.) Fill in all the required fields
  - b.) Enter **000011** into the Case Number field
  - c.) Enter **GCCQUAM6** into the PIN field
  - d.) Click the 'Create Account' button

Note: Keep your User Name and Password to login to CEHR

### 3. Consumer creates a user account on the CEHR website.

- a. Primary clinicians may assist the consumer with creating a CEHR account or the consumer may choose to do it themselves at home.
- b. The consumer goes to the website: <http://www.mycehr.com>.
- c. The consumer clicks on the **Get Started** button on the CEHR main screen. [Note: At this point the consumer does not yet have a username and password.]

**CEHR** COMMUNITY ELECTRONIC HEALTH RECORDS [Skip to Content](#)

**Not a Member Yet?**

**Create an account and get started!**

[Get Started](#)

Welcome!

Welcome to the Community Electronic Health Records ("CEHR") website.

CEHR (pronounced "Share"), provides access to your personal health information along with a wealth of related educational materials. CEHR is a web service that offers a secure, private channel for healthcare consultation communications with your health provider, personal medical information storage, healthcare information, and related products, services and content (collectively the "The CEHR Services").

If you already have an account, login below. Otherwise, [create an account](#) today!

**Already have an account? Login below:**

User Name:

Password:

[Forgot your password?](#)

[Login](#)

This site is best viewed and operated with version 8.0 or higher of Microsoft Internet Explorer

## Staff Instructions For the Patient Portal (CEHR)

- d. The consumer will enter the information needed to create their user account, including their name, date of birth, an email address, case number and PIN. They will create a username and password of their choice. Click **Create Account** when done.

Create an Account

Please complete the information below to create a new account

**Account Information**

Your Name:    
First Last

Create a User Name:\*   
(Example: JohnDoe24)

E-Mail:\*   
(Example: example1234@somemail.com)

Patient's Date of Birth:\*  

☐ Check here if you are parent or guardian of the patient

Password:\*

Confirm Password:\*

**Health Facility Information**  
This information must be provided to you by your health facility

Case Number:\*

PIN:\*

\* denotes required fields

- e. The consumer's case number and PIN are used to create the account, but are not needed after the account has been created. The consumer must use their username and password to log into the myCEHR website now.
4. **Consumer uses their username and password to login to the myCEHR website.**
    - a. The consumer goes to the website: <http://www.mycehr.com>
    - b. The consumer enters the username and password they chose when they created their CEHR account and then click on the **Login** button.

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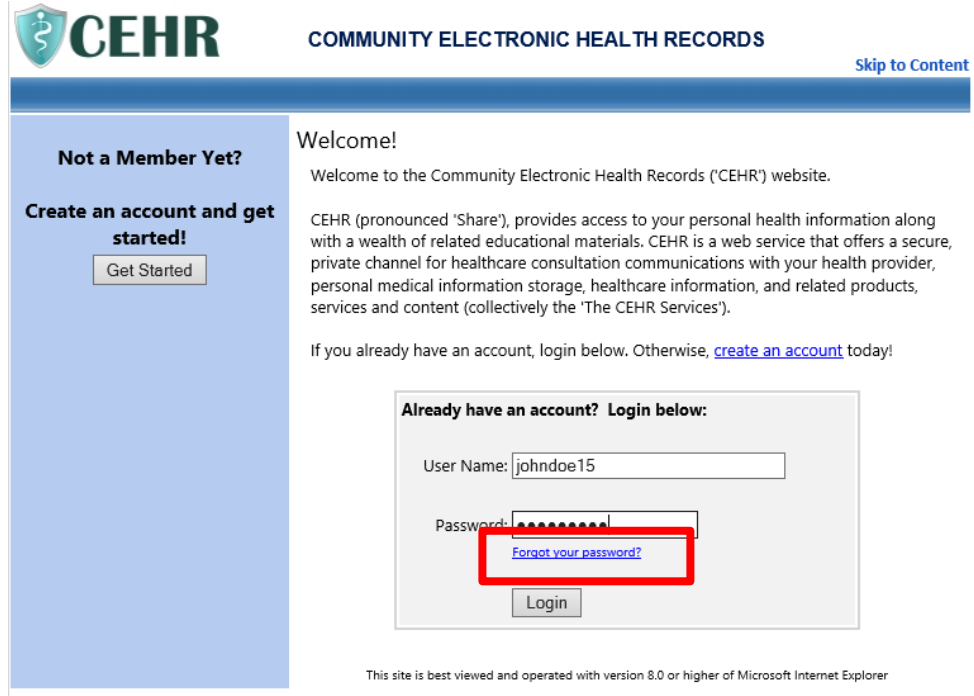
[Forgot your password?](#)

[Login](#)

This site is best viewed and operated with version 8.0 or higher of Microsoft Internet Explorer

- c. The first time the consumer logs into their CEHR account, they will be asked to accept the user agreement. They will need to scroll to the bottom of the screen and click on the **Accept** button in order to continue to their information.
5. **Troubleshooting common problems consumers may encounter.**
- a. **PROBLEM: The consumer forgot their password.**
    - i. The consumer can reset their password by clicking on the link, **Forgot your password?** At the bottom of the login screen. (Primary clinicians can also re-set the consumer's password as described in step 19 below.)

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**CEHR** COMMUNITY ELECTRONIC HEALTH RECORDS [Skip to Content](#)

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[Forgot your password?](#)

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- ii. A window called **User Information** will be displayed. The consumer is asked to enter their username and the email address they used when creating their account. Click on the **Reset my Password** button at the bottom of the screen.



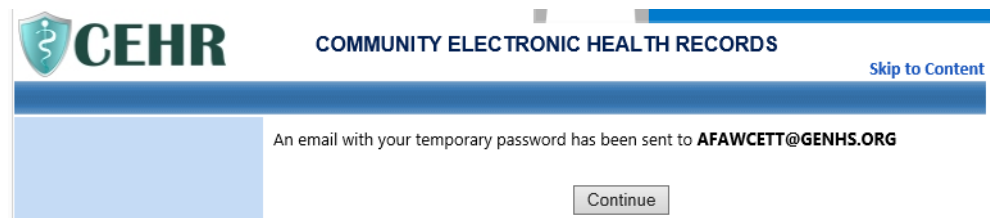
**User Information**

Please identify yourself by answering the following questions:

**What is your User Name?**

**What is your Email Address?**

[Reset my Password](#) [Cancel](#)



**CEHR** COMMUNITY ELECTRONIC HEALTH RECORDS [Skip to Content](#)

An email with your temporary password has been sent to **AFAWCETT@GENHS.ORG**

[Continue](#)

- iii. The system will send the consumer a temporary password via their email account.
- iv. The consumer retrieves the email then goes to the CEHR login screen and enters their username and temporary password. The consumer then clicks the **Login** button.

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- v. The CEHR website will automatically take them to the **Change Password** screen upon logging in. The consumer must enter their temporary password in the current password text box and then type a new password in the two following textboxes. This password must be something that wasn't used previously.

The screenshot shows the CEHR (Community Electronic Health Records) website. The header includes the CEHR logo, the text "COMMUNITY ELECTRONIC HEALTH RECORDS", and a "Skip to Content" link. The main content area is titled "Change Password" with a lock icon. Below the title, there is a message: "To change your password, enter your current password and your new password below. When you are finished, click the 'Change Password' button. Click 'Cancel' if you do not want to change your password." There are three input fields: "Current Password:\*", "New Password:\*", and "Re-Type New Password:\*". A note below the fields states "\*denotes required fields". At the bottom, there are two buttons: "Change Password" and "Cancel".

b. **PROBLEM:** Consumer forgot their username.

- i. Primary clinicians log into CHIP and navigate to the consumer information module, page **1. Basic Information** screen and scroll down to **Community Electronic Health Records (CEHR)** section.
- ii. Primary clinician clicks on **Update CEHR Information** link.

The screenshot shows the "Community Electronic Health Records (CEHR)" section. It includes the following information: "Date CEHR PIN was offered to or requested by Consumer" (09/22/2015), "CEHR PIN" (GCCICUKN), and "CEHR Last Accessed" (09/22/2015 08:48:33 AM). There are two links: "Update CEHR Information" (highlighted with a red box) and "Print Instructions".

- iii. The **Update CEHR Information** pop-up window will open. The consumer's **CEHR User Name** is displayed in the pop-up window.

The screenshot shows the "Community Electronic Health Records System Information (CEHR)" pop-up window. It includes the following information: "Date CEHR PIN was offered to or requested by Consumer" (09/22/2015), "CEHR PIN" (GCCICUKN), and "CEHR User Name" (johndoe3, highlighted with a red box). There are two links: "Reset CEHR User Password" and "Clear Pin". At the bottom, there are two buttons: "SAVE" and "CANCEL".

- iv. Primary clinicians inform the consumer of their CEHR username.



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c. **PROBLEM:** Consumer is locked out of CEHR account.

- i. Primary clinician goes to CHIP consumer information module, page **1. Basic Information** and scrolls down to **Community Electronic Health Records (CEHR)** section.
- ii. Primary clinician clicks on **Update CEHR Information** link.

Community Electronic Health Records (CEHR) [Update CEHR Information](#) [Print Instructions](#)

Date CEHR PIN was offered to or requested by Consumer 09/22/2015 CEHR PIN GCCICUKN

CEHR Last Accessed ⓘ  
09/22/2015 08:48:33 AM

- iii. The **Update CEHR Information** pop-up window will open. Primary clinician clicks on the **Reset CEHR User Password** link.

Community Electronic Health Records System Information (CEHR)

Date CEHR PIN was offered to or requested by Consumer 09/22/2015 CEHR PIN GCCICUKN [Clear Pin](#)

[Use Current Date](#)

CEHR User Name johndoe3 [Reset CEHR User Password](#)

[SAVE](#) [CANCEL](#)

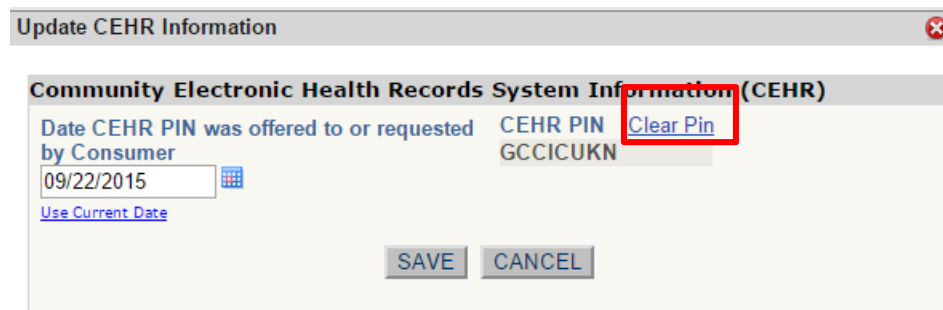
- iv. This will unlock the consumer's CEHR user account and create a temporary password. Primary clinician clicks the **Save** button to save temporary password. Primary clinician gives the temporary password to the consumer.
- v. The consumer goes to the CEHR login screen and enters their username and temporary password.
- vi. The CEHR website will automatically take them to the **Change Password** screen. The consumer must enter their temporary password again and create a new password that has not been used previously.

# Staff Instructions For the Patient Portal (CEHR)



The image shows the CEHR (Community Electronic Health Records) login page. At the top, there is a logo with a caduceus and the text 'CEHR' and 'COMMUNITY ELECTRONIC HEALTH RECORDS'. A 'Skip to Content' link is in the top right. Below the header, there is a 'Change Password' section with a lock icon. The instructions state: 'To change your password, enter your current password and your new password below. When you are finished, click the 'Change Password' button. Click 'Cancel' if you do not want to change your password.' There are three input fields: 'Current Password:\*', 'New Password:\*', and 'Re-Type New Password:\*'. A note below the fields says '\*denotes required fields'. At the bottom of the form are 'Change Password' and 'Cancel' buttons. A 'Send a Message' link is also visible in the top right of the form area.

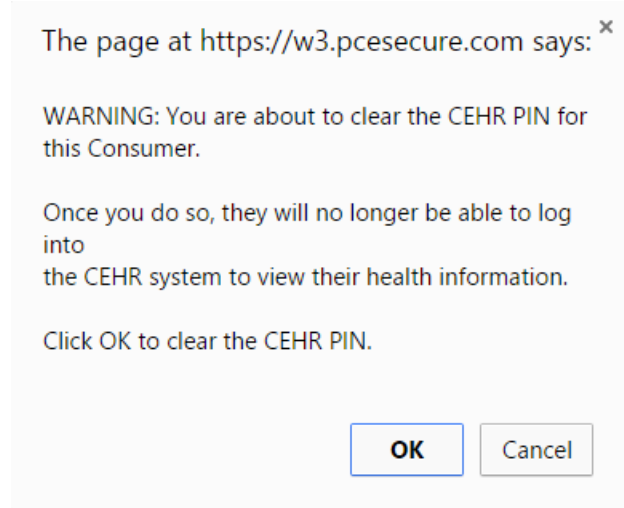
- d. **PROBLEM:** Consumer did not create CEHR account and lost PIN or PIN has expired.
- Primary clinician goes to CHIP Consumer Information module page **1. Basic Information** and scrolls down to **Community Electronic Health Records (CEHR)** section.
  - Primary clinician clicks on **Update CEHR Information** link.
  - The **Update CEHR Information** pop-up window will open. Primary clinician clicks on the **Clear PIN** link above the current PIN.



The image shows a pop-up window titled 'Update CEHR Information'. Inside, there is a section for 'Community Electronic Health Records System Information (CEHR)'. It contains a table with two columns: 'Date CEHR PIN was offered to or requested by Consumer' and 'CEHR PIN'. The first row shows the date '09/22/2015' and the PIN 'GCCICUKN'. A 'Clear Pin' link is highlighted with a red box next to the PIN. Below the table, there are 'SAVE' and 'CANCEL' buttons. A 'Use Current Date' link is also present below the date field.

- A warning message will pop-up on the screen. Click **Ok** on the pop-up window; the window will disappear and the PIN will be deleted.

## Staff Instructions For the Patient Portal (CEHR)



- v. Primary clinician then creates a new PIN number for the consumer and prints the instruction sheet for the consumer (See steps 1 through 4 in the Detailed Instructions section above). **Note: Keep the original date that the original PIN was given to the consumer; do not change the date as indicated by the warning message.**

# Staff Instructions For the Patient Portal (CEHR)

## 6. View of CEHR website.

The screenshot displays the CEHR website interface. At the top, the logo features a green shield with a white caduceus and the text "CEHR" in large green letters. To the right of the logo, the text "COMMUNITY ELECTRONIC HEALTH RECORDS" and "Genesee Health System" is displayed. A "Skip to Content" link is visible. Below the header, there are links for "home" and "logout".

The main content area is divided into two columns. The left column contains a vertical menu with the following sections:

- My Home**
- My Personal Information**
  - Contact Information
  - Emergency Contacts
  - My Messages
- My Health Record**
  - Allergies
  - Diagnosis
  - Medications
  - Vitals
  - Lab Test Results
- My Appointments**
- My Documents**
- Continuity of Care**
- Resources**
- Assistance Programs**
- My Account**
  - Change Account Info
  - Change Password
  - Health Facilities
  - Access History

The right column features a "My Home" header with a "Send a Message" link. Below this, a welcome message states: "Welcome to your Community Electronic Health Records (CEHR), where you can view your health information and use related tools to help ensure your wellbeing." This is followed by a section titled "The website is broken up into the following major sections:" which lists the following links, each accompanied by an icon:

- My Personal Information** (Icon: Notepad and pencil)
- My Health Record** (Icon: Red cross)
- My Appointments** (Icon: Calendar showing the number 15)
- My Documents** (Icon: Document with a magnifying glass)
- Continuity of Care** (Icon: Curved arrow)
- Resources** (Icon: Book and folder)
- Assistance Programs** (Icon: Hand holding a heart)
- My Account** (Icon: ID card)