OnPatient Dashboard

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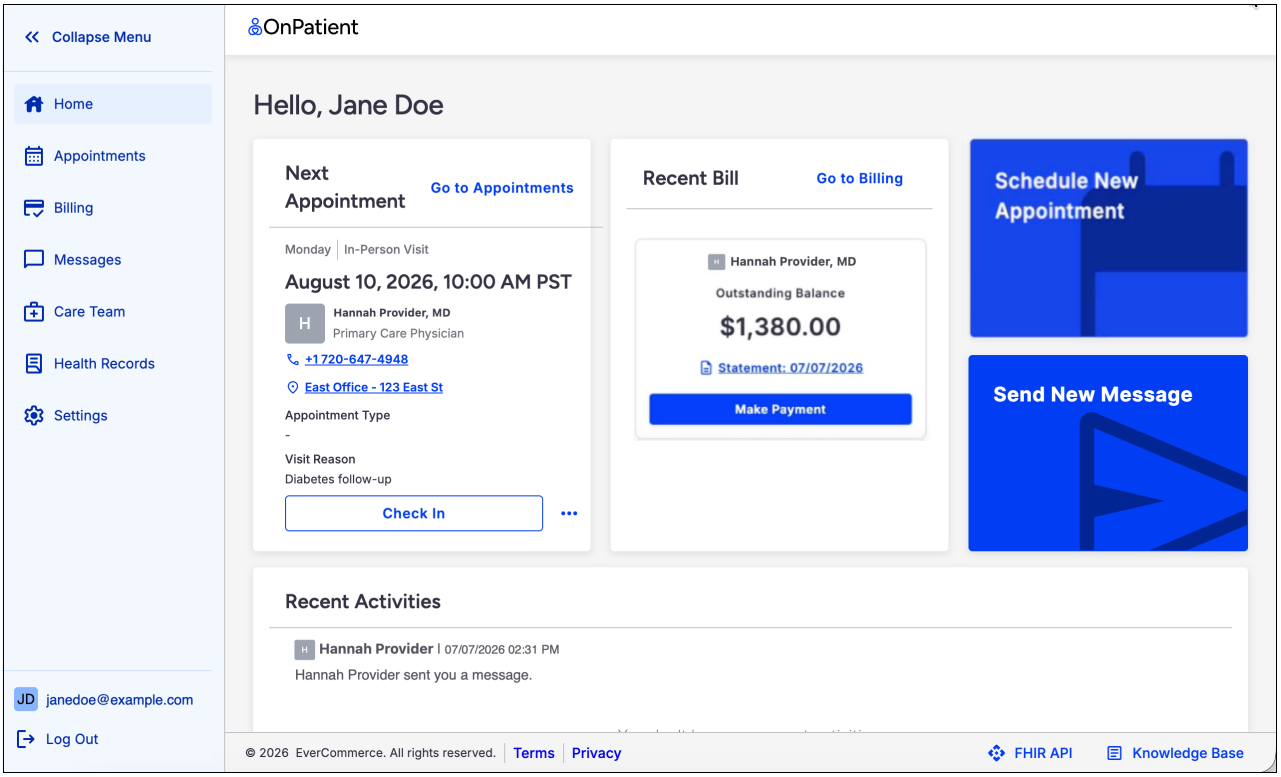
> **About the new OnPatient portal experience**
> The redesigned OnPatient portal experience is currently in beta and available to select early-access users. This knowledge article may be updated as the portal experience evolves.

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The OnPatient **Dashboard** is the home page you see after you log in to the OnPatient patient portal. You can manage appointments, view health records, communicate with your care team, make payments, and update your account — all in one place.

Go to the Dashboard

Select **Home** to open the **Dashboard** from another page.



Dashboard widgets and cards

- **Next Appointment**: View your upcoming appointment. You can check in for, reschedule, or cancel this appointment. Select **Go to Appointments** to open the **Appointments** page.
- **Recent Bill**: View or pay your recent billing statement. Select **Go to Billing** to open the **Billing** page.
- **Schedule New Appointment**: Schedule a new appointment with your provider.
- **Send New Message**: Send a message to your provider.
- **Recent Activities**: View a log of the five most recent account notifications, such as a new message, lab result, education document, or check-in forms reminder. Selecting a notification directs you to the relevant page.

Appointments

The **Appointments** page displays your upcoming and past appointments. You can:

- **Schedule an appointment** — Schedule a new appointment directly from the portal.
- **View upcoming appointments** — See scheduled appointments, including the date, time, provider, and office location.
- **View past appointments** — Review your history of previous visits.
- **Check in for an appointment** — Complete the check-in process before arriving at the office, including reviewing and signing forms.
- **Reschedule an appointment** — Reschedule an upcoming appointment directly from the portal.
- **Cancel an appointment** — Cancel an upcoming appointment directly from the portal.

> Appointment scheduling and cancellation options depend on what your provider's office offers.

Appointments

Billing

The **Billing** page gives you visibility into your account balance and payment activity. You can:

- **View statements** — See itemized billing statements for services you received.
- **Make a payment** — Pay outstanding balances directly from the portal.
- **Manage payment methods** — Add, edit, or remove payment methods.
- **View payment history** — Review past payments made through OnPatient.
- **Manage payment plans** — View payment plan details and make a payment.
- **Manage memberships** — View membership details and make a payment.

> Online payment, payment plan, and membership options depend on what your provider's office offers.

Messages

The **Messages** page is where you can communicate securely with your provider. You can:

- **Send a message** — Compose and send a secure message to your provider.
- **View messages** — Read replies and messages from your provider.
- **Reply to messages** — Respond to messages from your provider within the same thread.

Messages & Communication

Care Team

The **Care Team** section lists the providers and staff involved in your care. You can:

- **View care team members** — See a list of providers and staff assigned to your care, including names, roles, and office locations.
- **View provider contact details** — Access office phone numbers and addresses for each care team member.
- **Schedule an appointment with your provider** — Schedule an appointment directly from your provider's

profile
- **Send a message to your provider** — Start a secure message directly from a provider's profile.
- **Link a provider to your portal account** — Connect a provider to your portal account (requires an activation code from the provider's office).

Care Team

Health Records

The **Health Records** page gives you access to your clinical information shared by your provider. You can view:

- **Problems** — Your current problem list.
- **Allergies** — Your documented allergies and reactions.
- **Medications** — Your current medications.
- **Preferred Pharmacies** — A list of pharmacies where your prescriptions can be sent.
- **Lab Results** — Lab results shared by your practice.
- **Immunizations** — Your history of administered vaccines.
- **Vitals** — Recorded vitals such as temperature, pulse, and blood pressure that can be tracked over time.
- **Measurements** — Physical measurements such as height, weight, and BMI that can be tracked over time.
- **Education Documents** — Patient education materials shared by your provider.
- **Export** — Download a copy of your health records for personal use or to share with another provider.
- **Access Logs** — A history of who has accessed your health records through the portal, including dates and accessing parties.

Health Records

Settings

You can manage your personal information, account preferences, and security settings in **Settings**. You can:

- **Account** — Update your preferred name, cell phone number, and password.
- **Notifications** — Set your preferences for new messages, appointments, lab results, and form reminders sent by your provider's office, such as push, email, or text message notifications.
- **Representatives** — Add or manage authorized representatives, such as a parent, guardian, or caregiver, who can access the portal on your behalf or whose portal you can access on another's behalf.
- **FHIR API** — Manage access for third-party health apps that connect to OnPatient using the FHIR API. You can view authorized apps and revoke access at any time.
- **Two-factor authentication** — Turn on two-factor authentication (2FA) to add an extra layer of security to your OnPatient account. When turned on, you must verify your identity with a second step, such as a code sent to your phone, each time you log in.

Account Management