

Connie Patient Connect User Guide

Last update: February 3, 2025

Connie Patient Connect provides a portal to your personal health record (PHR) if you are a resident of Connecticut. You can use Connie Patient Connect to view your health information from providers connected to Connie in one place. In addition to viewing your health information, you can add appointments and to-do lists and allow caretakers and family members to manage health data on your behalf. The data in your Connie Patient Connect account may come from any organization connected to Connie, including but not limited to providers, pharmacies, and labs. Information exchanged by Connie member providers arrives in your account daily.

This document outlines the features of Connie Patient Connect and serves as a user guide for its basic functions. It offers an overview of each platform feature, including explanations of their purposes and potential uses.

Patient Connect Support

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Logging In

Purpose: You would like to set up a new Account or log into Connie Patient Connect.

Setting up a New Account

To set up a new account, select the blue “Sign up now” button in login page.

Connie Patient Connect
Your Personal Health Information Manager

Manage your health information from all participating providers in one location. Share your information with caregivers and family members.

Sign up now

Forgot password? | Forgot username?

Login

Connie
Connecting People for Better Health

Medical Records
Manage all of your records from one simple, easy to use portal.

Personal Trackers
Chart progress towards reaching your health goals.

Dashboard
Easily share your information with family members and caregivers.

Contact us | FAQs | Privacy Policy | Terms and Conditions

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The Terms and Conditions page displays. Select the “I have read this Agreement and agree to the terms and conditions” box. Select “Accept” button. You must scroll to the bottom of the Terms and Conditions for the accept box to be available to select. You are only able to set up an account if you accept the terms and conditions.

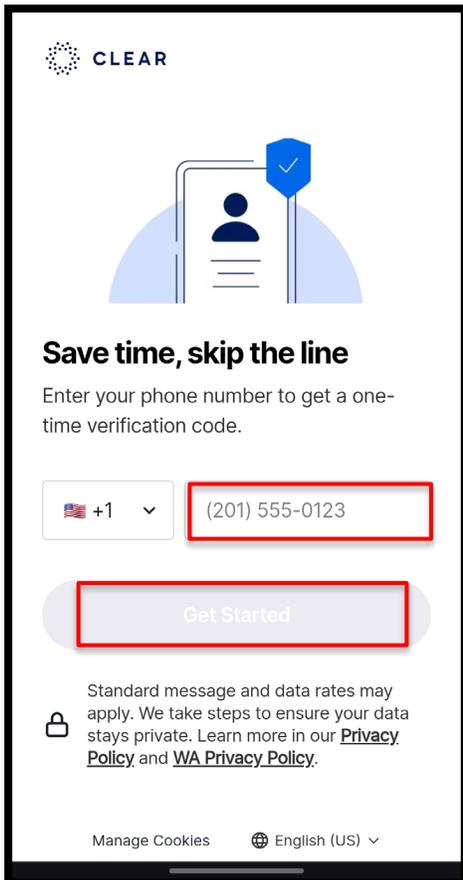
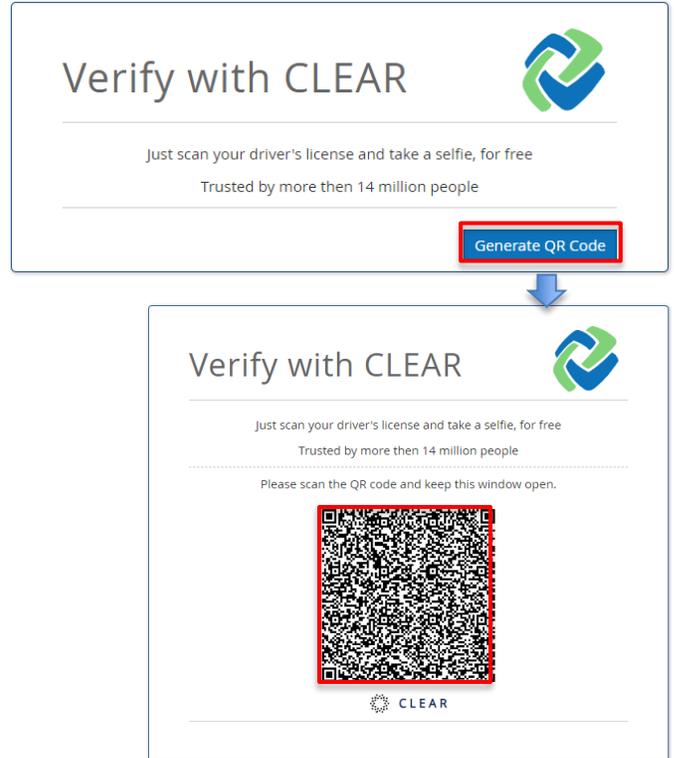
I have read this Agreement and agree to the terms and conditions

Accept

ID Verification through CLEAR

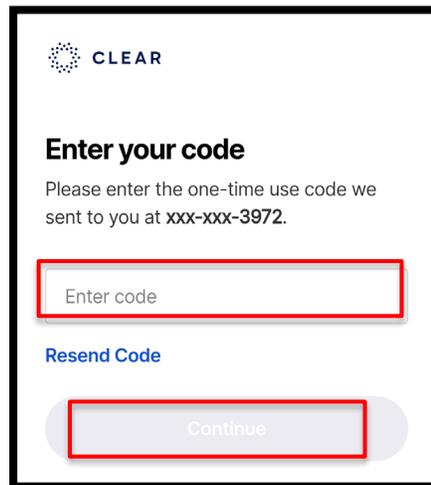
You will need to verify your identity using CLEAR.

1. In the “Verify with CLEAR” dialogue box, select “Generate QR Code”.
2. Use your cell phone to scan the QR code to open the CLEAR website.

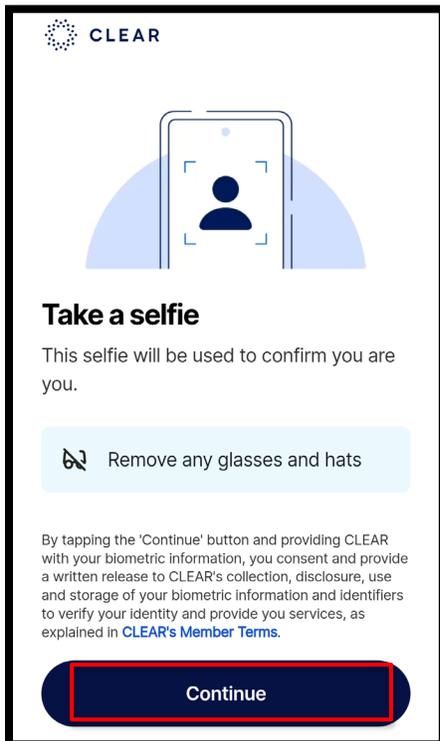
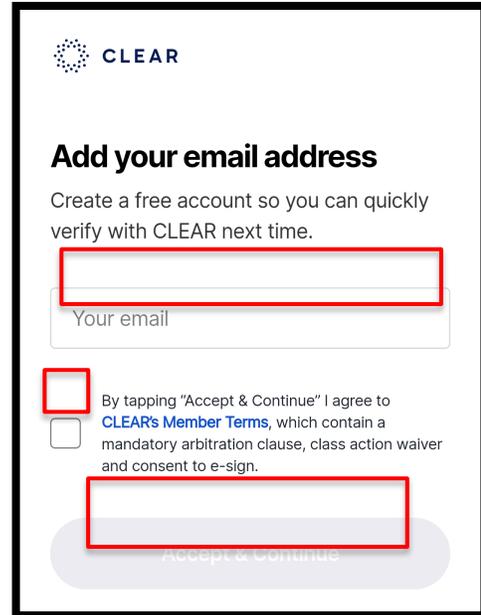


3. Enter your phone number and select the “get started” button. A six-digit code will be sent to your cell phone. If you did not receive a code within a few seconds, select “resend code”.

4. Enter the code into the dialog box.. Click Continue



5. Add the email address you would like associated with your CLEAR account, and check the CLEAR's Member Terms box. You can select the blue text to read CLEAR's Terms. Select the "Accept & Continue" button.

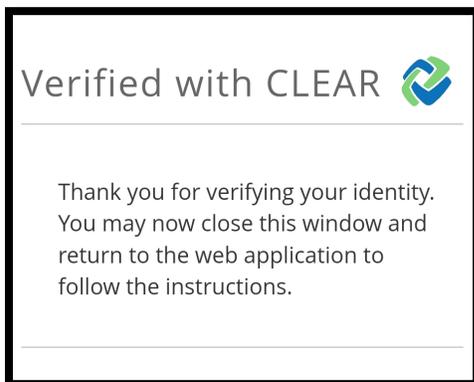
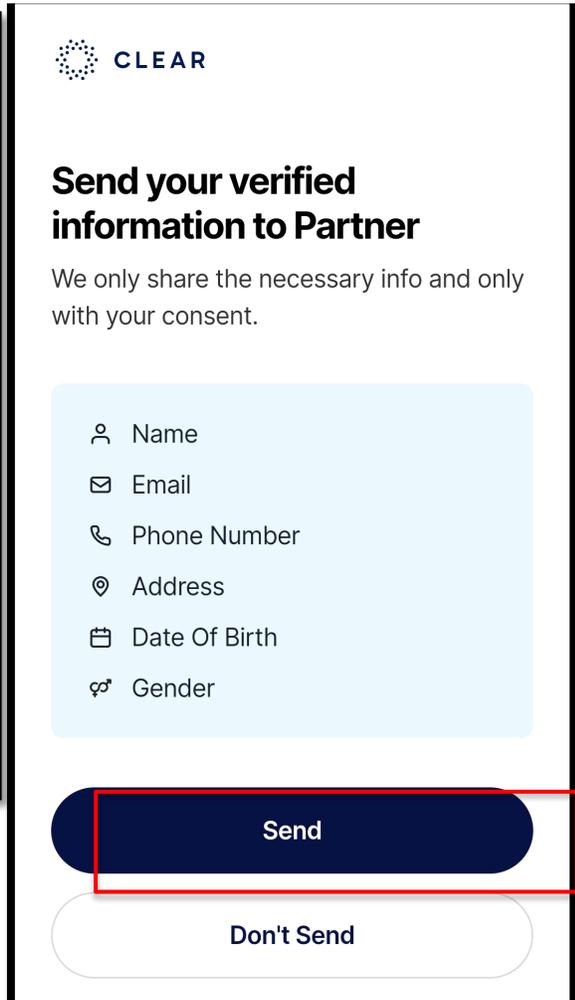
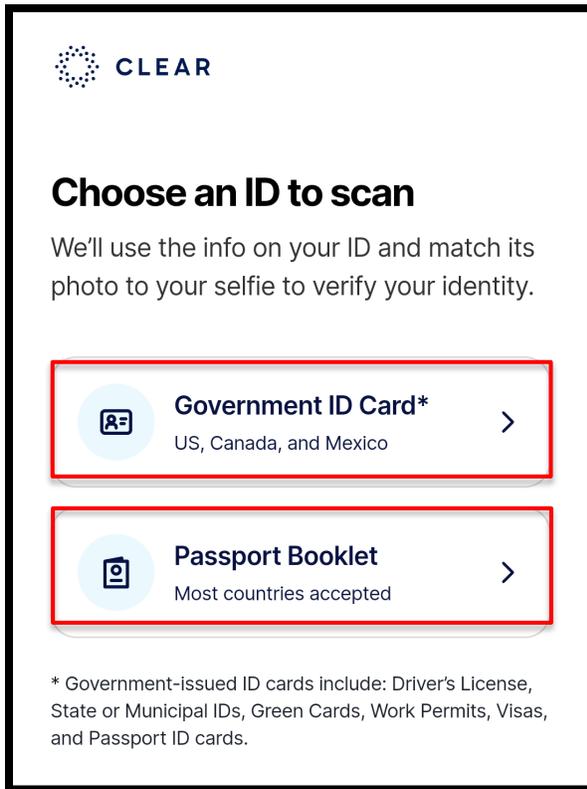


6. Take a selfie using your cell phone. Select the "Continue" button, then allow CLEAR to use your camera to take the image. Follow the directions provided in the CLEAR application to complete the selfie successfully.

7. Choose which ID documentation you will use to complete the process. You can either select a **Government ID Card**, which includes a driver's license, state or municipal IDs, green cares, work

permits, visas, and passport ID cards from the US, Canada or Mexico. Alternatively, you can use your **Passport**. You will be asked to take a picture of both the front and back of your ID card.

8. The final step is selecting “Send” to send your demographic information from CLEAR to the Connie Patient Connect website. This step is required to match your identity to your health record.

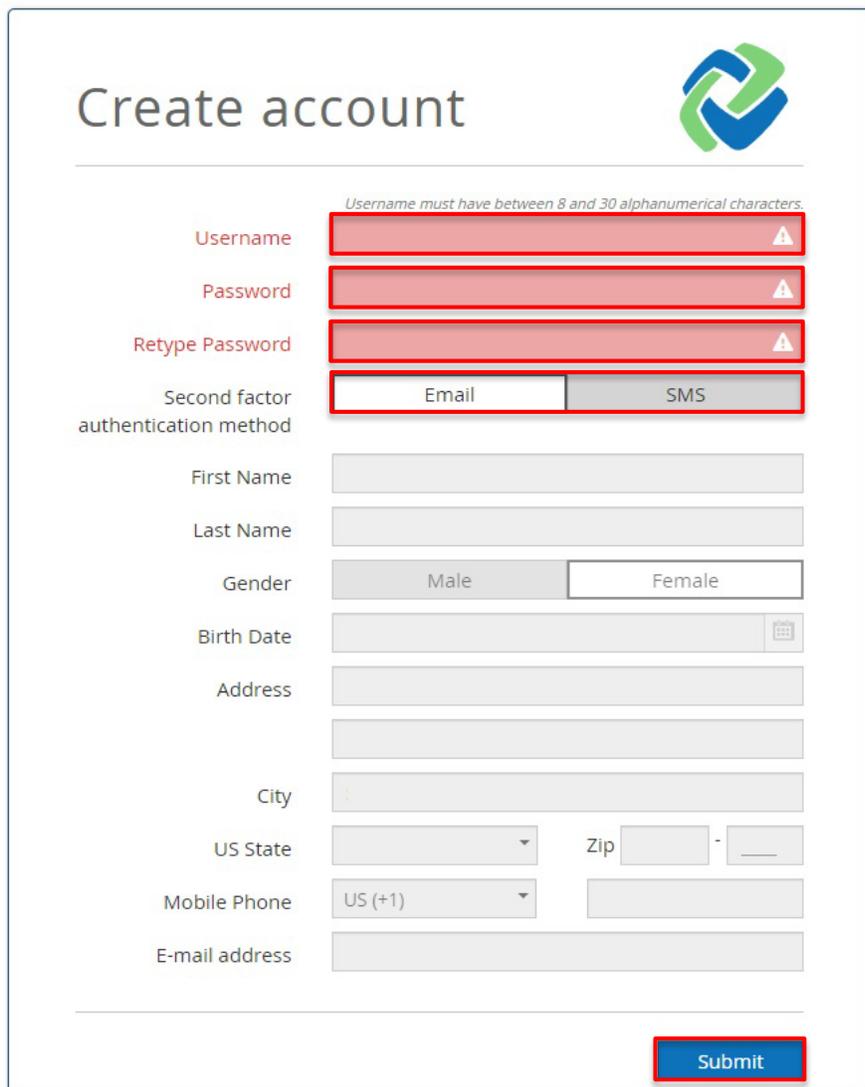


Once you select send, you can close the CLEAR window on your cell phone. Go back to your computer and the window where you generated the QR code should automatically update to show the Create account page (see image below).

TIP: if your computer window does not automatically update to the “Create account” page, clear your cache in your browser. You may have to go through the steps above again.

Completing Account Setup

Create a Username between 8-30 characters long. You can use both letters and/or numbers. You will also create a password. Passwords must be at least 12 characters long. If you prefer to receive a text message for your second factor authentication code, rather than an email, select "SMS." Once completed, select the blue "Submit" button at the bottom of the dialog box.



The screenshot shows a 'Create account' form with the following fields and options:

- Username:** A text input field with a red border and a warning icon. A note above it states: "Username must have between 8 and 30 alphanumerical characters."
- Password:** A text input field with a red border and a warning icon.
- Retype Password:** A text input field with a red border and a warning icon.
- Second factor authentication method:** Two radio buttons labeled "Email" and "SMS". The "SMS" option is selected.
- First Name:** A text input field.
- Last Name:** A text input field.
- Gender:** Two radio buttons labeled "Male" and "Female".
- Birth Date:** A date picker field.
- Address:** A text input field.
- City:** A text input field.
- US State:** A dropdown menu.
- Zip:** A text input field with a hyphen separator.
- Mobile Phone:** A dropdown menu with "US (+1)" selected and a text input field.
- E-mail address:** A text input field.

A blue "Submit" button is located at the bottom right of the form.

An email will be sent to the address provided. Click the link provided in the email to complete the account set up process. The link will open to the Connie Patient Connect login page. You are now able to log in with the username and passcode you created above.

TIP: check your junk mail folder for the activation email if you do not see it in your inbox.

Login to an Existing Account

Using the empty fields in the middle of the login page, enter your username in the field with the image of a person, and your passcode in the field with the image of a lock, and select the blue “login” button. If you have forgotten your password or username, you can use the “forgot password?” or “forgot username?” link on the log in page. You will be emailed a link to the email address you used to set up your account. Use the link in your email to reset your password or be reminded of the username you used to set up the account.

Connie Patient Connect
Your Personal Health Information Manager

Manage your health information from all participating providers in one location. Share your information with caregivers and family members.

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Forgot password? | Forgot username?

Login

Connie
Connecting People for Better Health

Medical Records
Manage all of your records from one simple, easy to use portal.

Personal Trackers
Chart progress towards reaching your health goals.

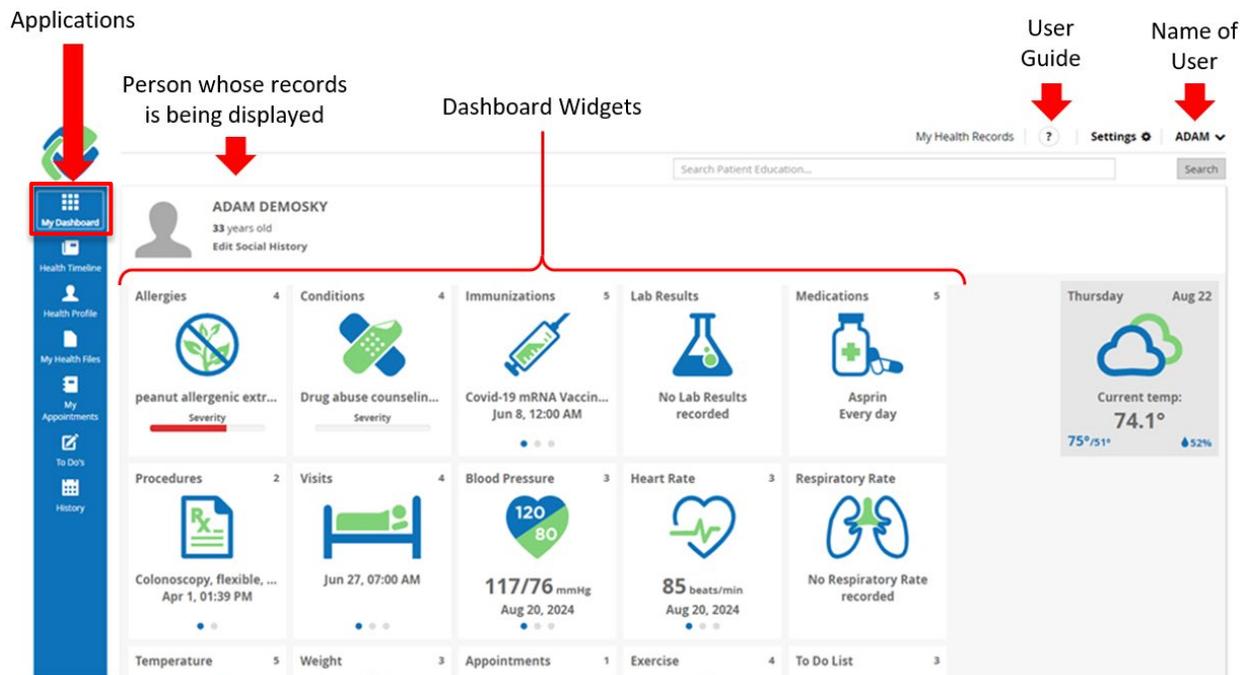
Dashboard
Easily share your information with family members and caregivers.

[Contact us](#) [FAQs](#) [Privacy Policy](#) [Terms and Conditions](#)

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Home Page

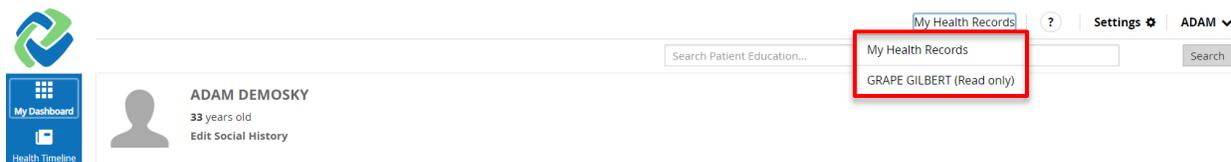
You will land on the home page upon login and see a visual summary of your health record. Features at the top enable you to update settings and your profile, as well as log out. Applications along the **blue** sidebar allow you to navigate between the major functions of the Connie Patient Connect platform. Clicking on the widgets in the center (e.g. Blood Pressure and Heart Rate) provides more information on the health measures or other health record elements. You can navigate to the Home Page by selecting My Dashboard in blue Applications bar at any time. Select the “?” to open a copy of this user guide in a new window.



My Health Records

Purpose: You want to be able to view your own profile or the profile of another user who has given you access.

Click on **'My Health Records'** at the top of the screen. When the dropdown menu appears click either **'My Health Records'** (default) or the name of the user who has authorized you access to their health record.



When you select another user who has given you access, their name will appear in the upper left corner, but your name will remain in the upper right corner. The “My Health Records” tab will change to “Health Records for: [name]” with the name of the person whose health records you are viewing.

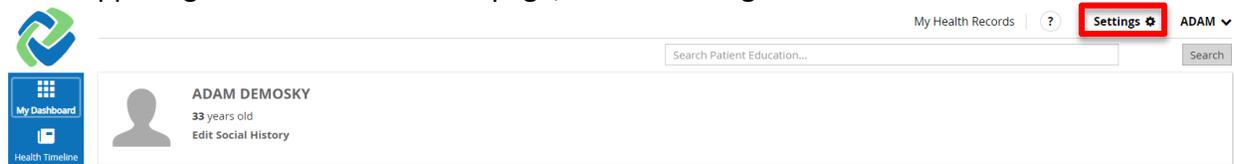


Selecting any of the widgets or applications described below will display the information for the person who has shared their health records with you.

Settings

Purpose: You would like to change your settings for Connie Patient Connect

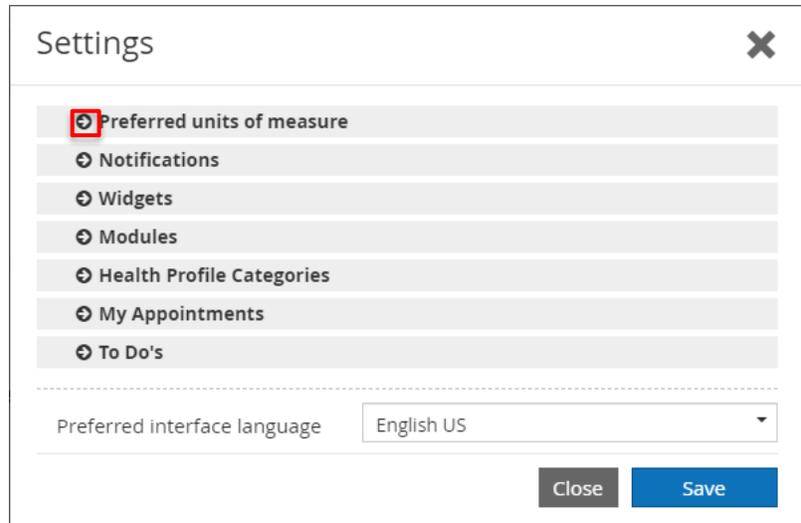
In the upper right corner of the home page, select “Settings”



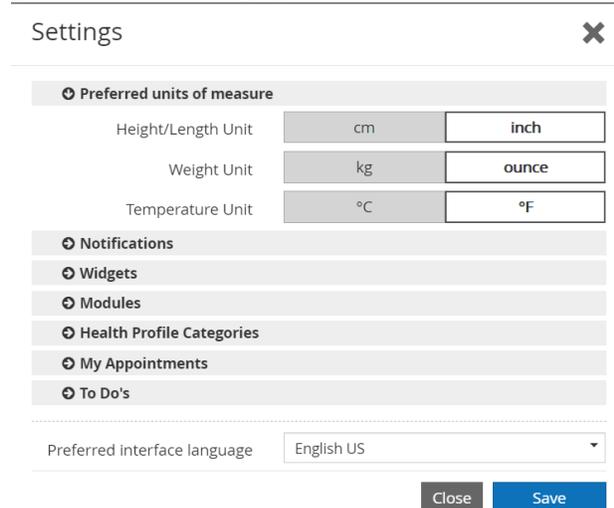
In the “settings” dialog box, you are able to:

- change from imperial (U.S.) to metric (global) units of measurement;
- set up notifications;
- add or hide widgets from My Dashboard;
- add or hide modules from the left hand navigation;
- add or hide categories available under Health Profile;
- change the view from monthly to weekly, daily or in a list and change the granularity of your appointments or to dos from hourly down to minutes.

To edit settings, select the arrow to the right of the setting you would like to change to expand the setting options.



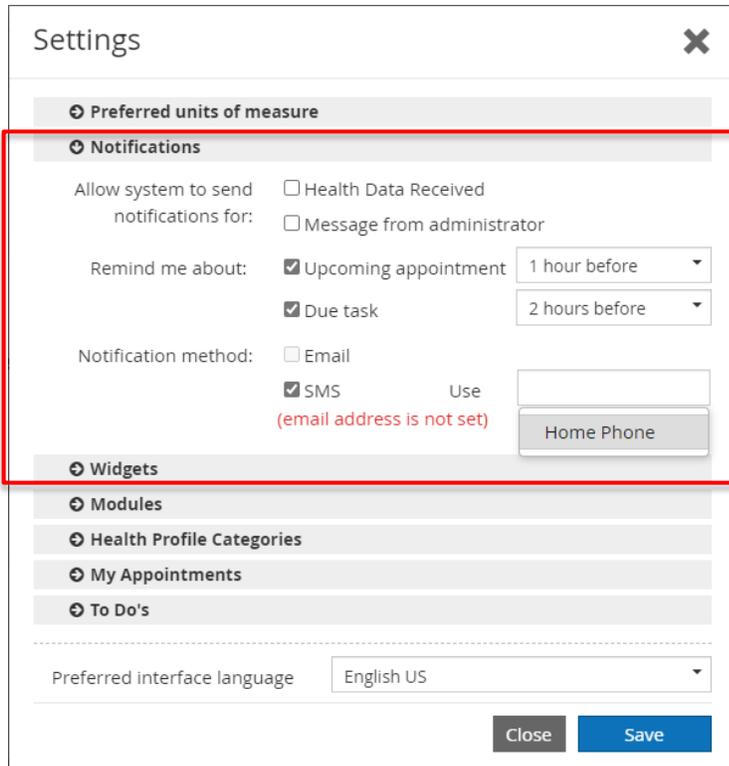
Preferred units of measure offers options between centimeters or inches for height, kilograms or ounces for weight, and Celsius versus Fahrenheit for temperature.



In Notifications, you can:

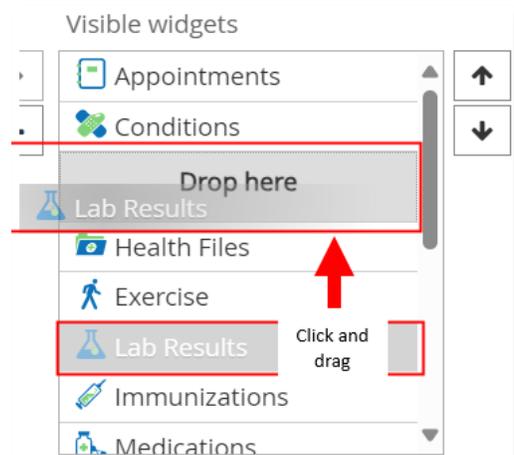
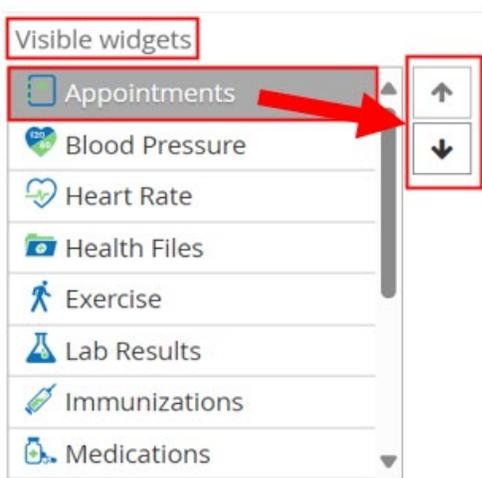
- Choose to allow the system to send notifications for received health data and messages from the administrator.
- Select reminders for upcoming appointments and tasks and the timeframe to receive the reminders.
- Choose notification methods by *email and/or SMS. For SMS, in the “Use” field, select the appropriate phone number to use.

Note, your profile must have at least one phone number and/or email address to use the notification feature. Please refer to the “My Profile” section below to learn how to update your profile.

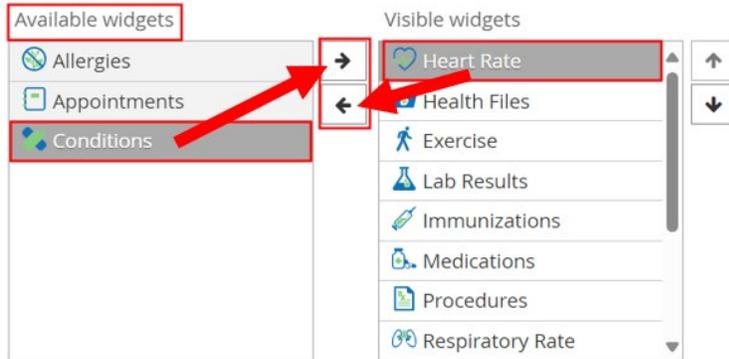


The **Widgets**, **Modules**, and **Health Profile Categories** sections allow you to hide elements from your view and rearrange the order of what you see on your Dashboard. When selecting these sections, you'll see two categories for what's available (on the right) and what's visible (on the left). To modify these sections, follow the steps below

- Click on the drop down arrow by Widgets. This will expand the Widgets section to show you "Available widgets" on the left and "Visible widgets" on the right.
- The "Visible widgets" list are the elements you see on your dashboard. You can change the order of what you see on your dashboard by clicking on the up and down arrows. Or clicking on the element and dragging it your preferred position on the list.



All elements that are visible are listed under Visible widgets. Hidden elements are then listed under “available widgets”. To hide or unhide elements, select any elements listed on one side and use the arrows in the middle to move the elements from the “visible widget” list to the “available widget” list or vice versa.



To change the settings for **My Appointments** or **To Dos**, select your default view and/or the level of detail you would like your appointments to be listed.



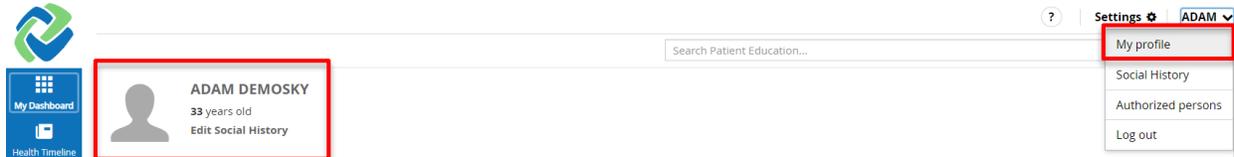
Select the blue “save” button at the bottom of the dialog box to save your settings and return to the home screen. Select “close” to go back to the home screen without saving your changes.

User Profile

My Profile

Purpose: You would like to update your username and password, authentication method, or profile information

From the home page, you can select your name in the upper left or upper right corner of the screen. When selecting from the upper right, a dropdown menu will appear. Select My profile.



Only a limited number of fields within the User Profile dialogue box can be edited: Password, Second factor authentication method, phone number, email address. To save changes, click on the blue “save” button at the lower right corner of the dialog box. Select “close” to close the dialog box and return to the home page.

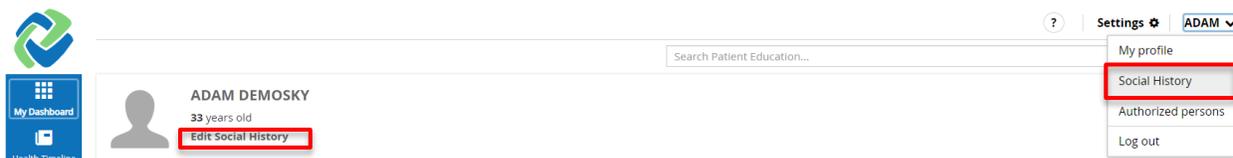
A screenshot of a 'User profile' dialog box. The dialog has a title bar with a close button (X). The form is divided into several sections. The top section contains 'Username' (adamdemosky), 'Password', 'Retype Password', and 'Second factor authentication method' (None, Email, SMS). The middle section contains 'Prefix', 'First Name' (ADAM), 'Middle Name', 'Last Name' (DEMOSKY), 'Previous Name', 'Suffix', 'Birth Date' (11/30/1990), 'Gender' (Male, Female), and 'Birth Sex' (Male, Female). The right section contains 'Race', 'Ethnicity', 'Preferred Language', 'Home Phone', 'Mobile Phone', 'Work Phone', 'E-mail', 'Address' (351 Farmington Ave), 'City' (Hartford), 'US State' (CT), and 'Zip' (12345 - 6789). At the bottom, there is an 'MRN' field and 'Close' and 'Save' buttons.

Note: the MRN number is your unique account number Connie attributes to your account.

Social History

Purpose: You would like to edit your social history

Click your name in the upper right of the screen. In the dropdown menu, click on **'Social History.'** Alternatively, select "Edit Social History" under your name on the left



Select any of the appropriate responses to the Social History status fields and click on the **blue Save** button at the lower right corner of the dialog box. Select "close" to close the dialog box and return to the home page.

Edit Social History

Smoking Status

Light cigarette smoker (1-9 cigs/day) Occasional tobacco smoker

Smoker Heavy tobacco smoker

Never smoked tobacco Tobacco smoking consumption unknown

Smokes tobacco daily Ex-smoker

Light tobacco smoker

Alcohol Use

Heavy drinker - 7-9u/day Very heavy drinker - greater than 9 units/day

Trivial drinker - <1u/day Non - drinker

Light drinker - 1-2u/day Moderate drinker - 3-6u/day

Alcohol consumption unknown

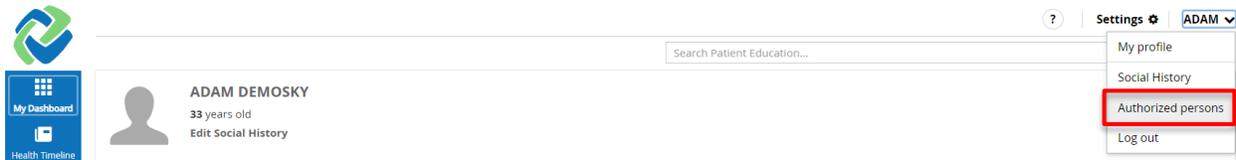
Occupation

Industry

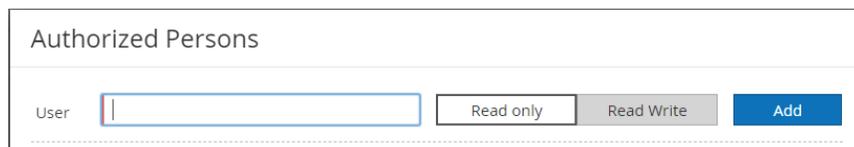
Authorized Persons

Purpose: You want to authorize another user to access your health records with different permission settings (e.g. read-only or read-write).

Click your name in the upper right of the screen. In the dropdown menu, click on **'Authorized persons.'**



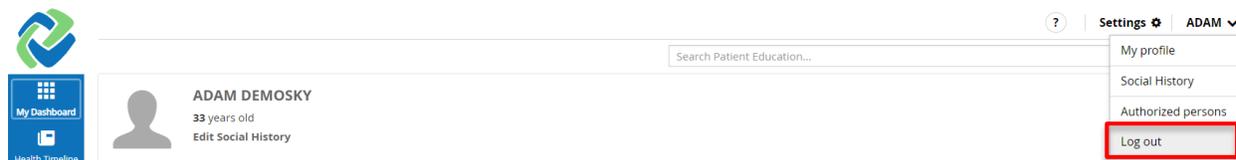
From there, enter in the username of the person to whom you are giving permission to access your health record. Note that the other user must have an existing Connie Patient Connect account. Select permission setting (read-only, read-write) and click **'Add.'** The new user will then be authorized.

A screenshot of the 'Authorized Persons' form. It features a text input field labeled 'User', two radio button options for 'Read only' and 'Read Write', and a blue 'Add' button.

Log out

Purpose: You want to end your session.

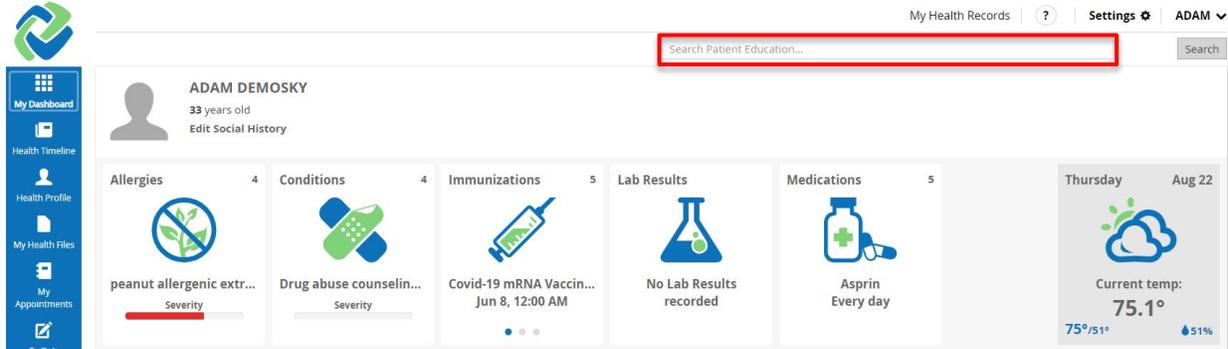
Click your name in the upper right of the screen. In the dropdown menu, click on **'logout.'** Your session will end and the log in page for the portal will appear.



Patient Education

At the top right of each page of the site, you can search for health-related topics.

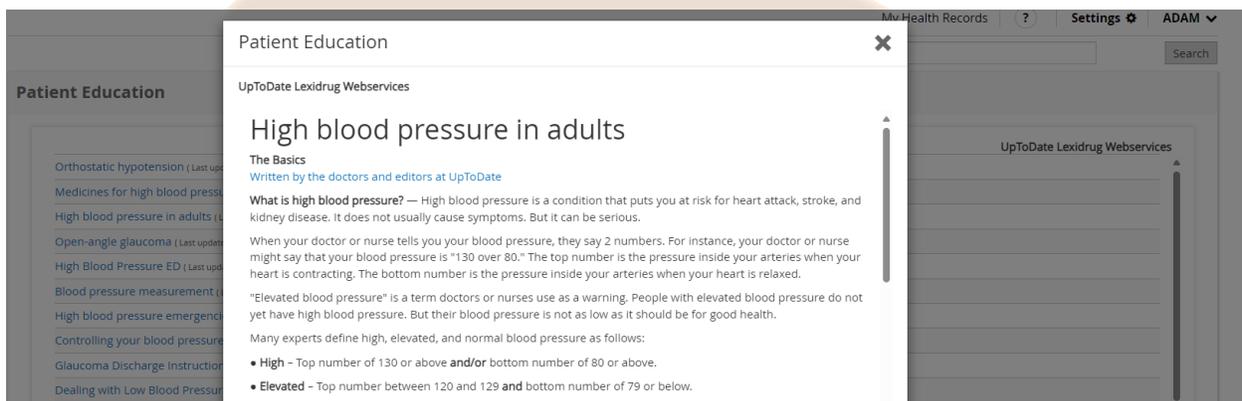
In the Search Patient Education field, type in a health topic. Click **'Search'**.



Search results will include a list of educational materials related to the search keyword(s).



Click the desired search result and a pop-up window will appear.



The screenshot shows a pop-up window with a title bar 'Patient Education' and a close button (X) in the top right corner. The main content area is titled 'High blood pressure in adults' and includes a sub-section 'The Basics' with the text 'Written by the doctors and editors at UpToDate'. The article text discusses high blood pressure, its symptoms, and how to lower it. At the bottom of the window, there are three buttons: 'Close', 'Save as', and 'Print'. The 'Close' button is a grey rectangle, while 'Save as' and 'Print' are blue rectangles. A red box highlights the 'Close', 'Save as', and 'Print' buttons.

To save the article, click the **'Save As'** button on the bottom of the pop-up window.

To print the article, select the **'Print'** button on the bottom of the pop-up window.

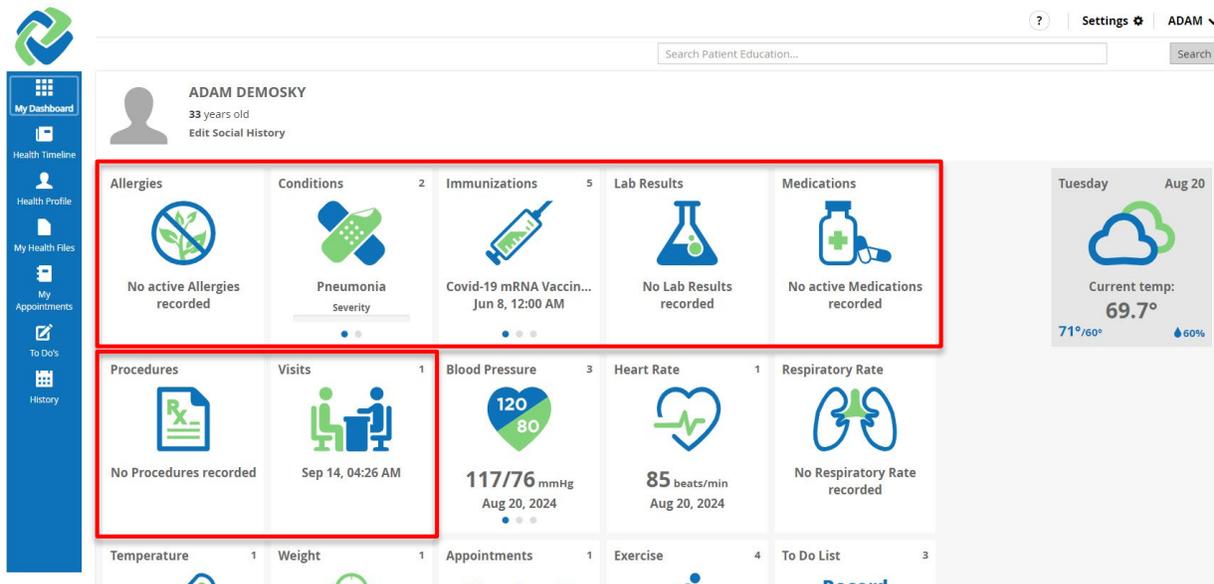
To close the pop-up window, click the **'X'** on the top right of the pop-up window or the **'Close'** button at the bottom of the pop-up window.

My Dashboard

The center of the home page contains individual widgets for quick views of your health records. The number of these widgets can be modified using the Settings feature described above. To move the widgets to new locations within the dashboard, you can either select a widget and drag it to your desired new location or you can go to Widgets under Settings (refer to steps on pg. 11). Clicking on a widget from My Dashboard provides a quick view of recent records either as a list or a graph.

List View Widgets

Select the icon for the following widgets to see a summary table of the three most recent records.



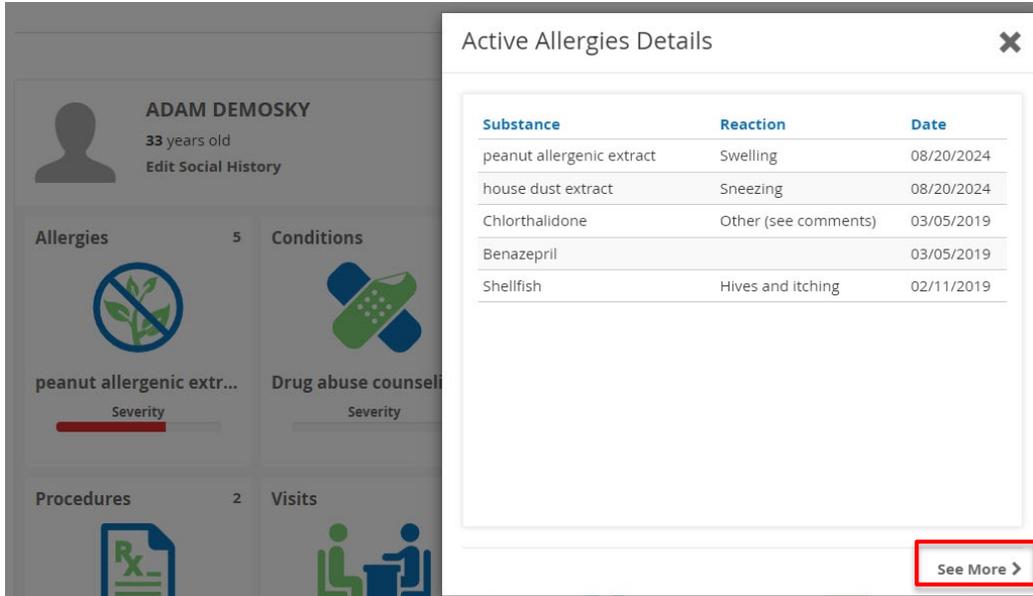
The number in the upper right corner of the widget indicates the number of records in your Health Profile related to the widget category

Hover your cursor over the widget icon. Click the '<' or '>' buttons to view the three most recent records.

When provided, the widget will display a bar indicating the Severity of the condition (Mild, Moderate, Severe, Fatal).

Allergies

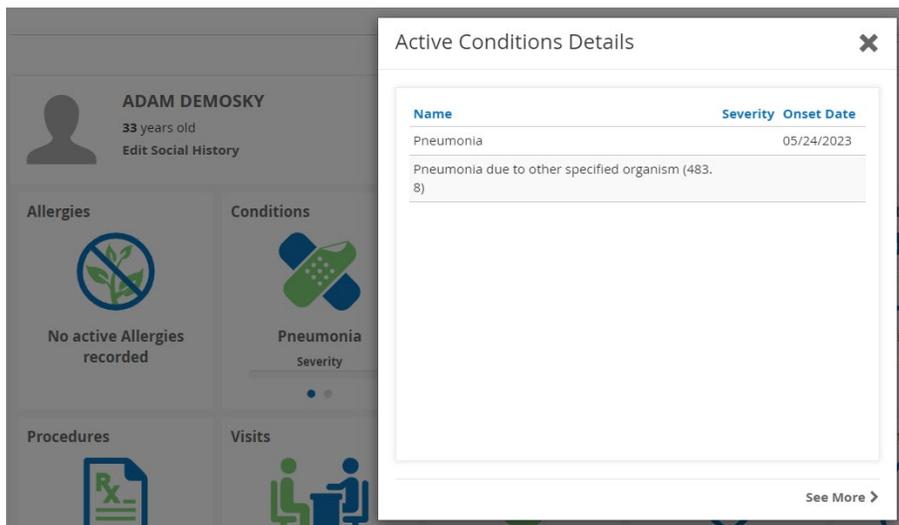
Purpose: You want to track your known drug allergies



Click **'See More >'** to view a complete list of all recorded allergies, with substance, reaction, status, and date recorded in your Health Profile.

Conditions

Purpose: You want to track your current and past medical conditions.



Click **'See More >'** to view a complete list of current and past medical conditions in your Health Profile. Each record lists the name of the diagnosis, severity, status and onset date.

Immunizations

Purpose: You want to keep track of your immunizations from your healthcare providers.

ADAM DEMOSKY
33 years old
Edit Social History

Allergies
No active Allergies recorded

Conditions
Pneumonia Severity

Immunizations Details

Vaccine	Date	Performer
Covid-19 mRNA Vaccine - Moderna 0.25 mL Booster	06/08/2022 12:00 AM	Denomme Kelly A RN
Covid-19 mRNA Primary Series Vaccine - Moderna 0.5 mL Full Dose	04/16/2021 12:00 AM	Hodges Kendall RN
Covid-19 mRNA Primary Series Vaccine - Moderna 0.5 mL Full Dose	03/19/2021 12:00 AM	Alvarado Suzanne RN

[See More >](#)

Click on '**See More>**' to view a complete list of all recorded immunizations in your Health Profile. Each record shows the type of vaccine, date, and performer, body site and administration notes.

Lab Results

Purpose: You want to view your lab results.

Grass Severity

Aortic valve stenosis Severity

Procedures 5

Visits May 18, 08:37 AM

Lab Results Details

Name	Value	Range	Date
BICARBONATE:SCNC:PT:SER:QN:	25 mmol/L	22 - 29 mmol/L	05/18/2022
GLUCOSE:MCNC:PT:SER/PLAS:QN:	88 mg/dL	70 - 99 mg/dL	05/18/2022
POTASSIUM:SCNC:PT:SER/PLAS:QN:	4.5 mmol/L	3.5 - 5.3 mmol/L	05/18/2022

[See More >](#)

Click '**See More >**' to view a complete list of all recorded lab results in your Health Profile. Each record shows the name of the test, value, range, date, and section.

Medications

Purpose: You want to view your medications.

Name	Schedule
Capsaicin 0.05 %	Start: 10/03/2019
Lidocaine 5 %	Every twenty four hours Start: 10/03/2019
Icy Hot Balm Extra Strength 7.6-29 %	
Latuda 120 MG	Every twenty four hours
Ibuprofen & Acetaminophen	
Latuda 120 MG 1 {tablet}	Every twenty four hours
Xanax XR 3 MG 1 {tablet_in_the_morning}	Every twenty four hours
Icy Hot Balm Extra Strength 7.6-29 %	
Xanax XR 3 MG	Every twenty four hours
Ibuprofen & Acetaminophen	

[See More >](#)

Click '**See More >**' to view a complete list of all recorded medications in your Health Profile. Each record shows the name of the medication with the dosage, schedule (frequency and start date), and status.

Procedures

Purpose: You want to keep track of your past medical or surgical procedures.

Procedure	Performer	Date
Colonoscopy, flexible, proximal to splenic flexure; with endoscopic ultrasound examination		04/01/2024 01:39 PM
Repair, primary, open or percutaneous, ruptured Achilles tendon		06/27/2022 01:40 PM

[See More >](#)

Click on '**See More>**' to view a complete list of all recorded procedures in your Health Profile. Each record shows the type of procedure, performer, date and body site.

Visits

Purpose: You want to track past visits with your healthcare providers.

The icon to the left of each entry indicates type of visit (inpatient, ambulatory, or emergency). Hover over the icon to identify the visit type.

The screenshot shows a patient profile for ADAM DEMOSKY, 33 years old. The profile includes sections for Allergies (peanut allergenic extr...) and Conditions (Drug abuse counsel...). A 'Visits Details' modal window is open, displaying a table of visits. The table has three columns: Type, Period, and Location. The first visit is highlighted with a red box around the 'Type' icon. The 'See More >' button at the bottom right of the modal is also highlighted with a red box.

Type	Period	Location
	05/28/2024 04:26 AM 05/28/2024 08:59 PM	
	09/14/2023 04:26 AM 09/14/2023 08:59 PM	
	01/01/2023 12:00 AM 01/02/2023 12:00 AM	Connie Hospital

Click on '**See More>**' to view a complete list of all recorded visits. Each record shows the type of visit (Inpatient, Ambulatory, or Emergency) along with the date period and location. It also shows Reason and Attending.

Graph View Widgets

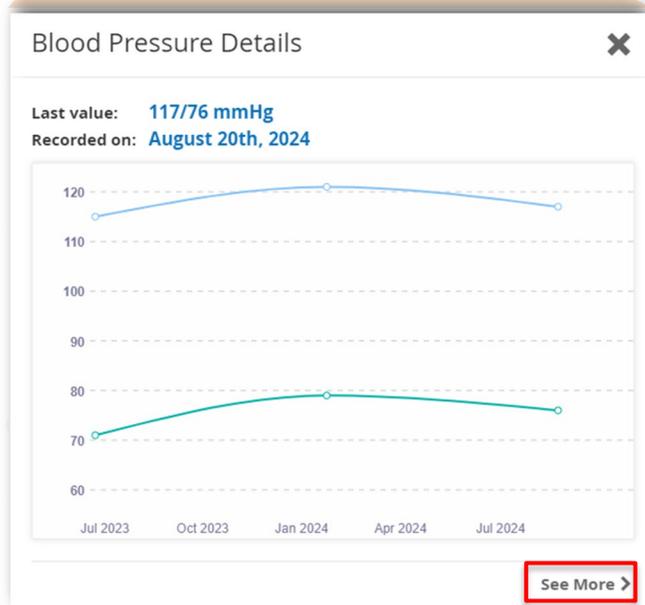
Select the icon for the following widgets to see a summary graph of the three most recent records. Hover your cursor over the widget icon. Click the '<' or '>' buttons to view the three most recent measurements.

ADAM DEMOSKY
33 years old
Edit Social History

Blood Pressure 3 Heart Rate 1 Respiratory Rate Temperature 4 Weight 1

117/76 mmHg Aug 20, 2024 85 beats/min Aug 20, 2024 No Respiratory Rate recorded 97.9 °F Aug 20, 2024 166 lb 0.00 oz Aug 20, 2024

Allergies Conditions 2 Immunizations 5 Lab Results Medications



Select the **Blood Pressure** widget to view and monitor your blood pressure.

Select the **Heart Rate** widget to view and monitor your heart rate.

Select the **Respiratory Rate** widget to view monitor your respiratory rate.

Select the **Temperature** widget to track your temperature over time.

Select the **Weight** widget to track your weight over time.

Click '**See More** >' to view the complete list of recorded measurements.

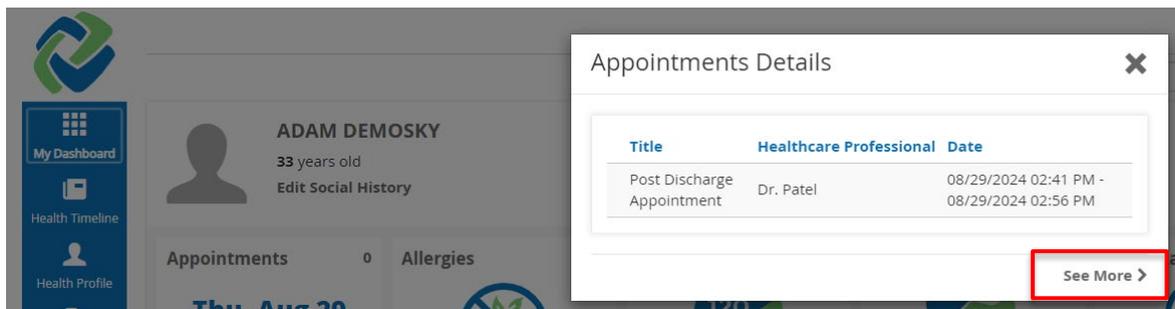
User Dependent Widgets

The My Appointments, To Dos, and Exercise widgets are manually populated by you, the user, in the Health Profile (see Health Profile section). You can view your most recent entries from My Dashboard.

Appointments

Purpose: You want to create and maintain a calendar for medication refills and appointment reminders.

From the *My Dashboard* page, click the **'Appointment'** icon to see a summary table of up to three future Appointments Details. Each appointment record includes title (e.g. Post Discharge Appointment), healthcare professional (e.g. Dr. Patel), and date.



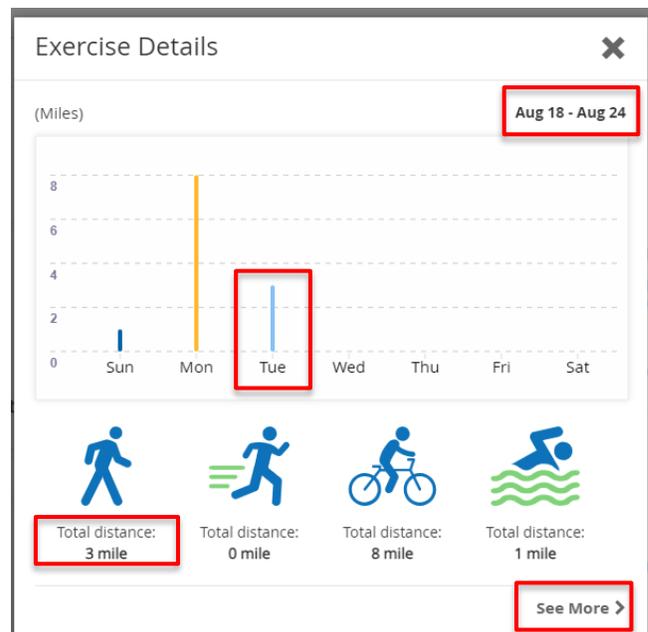
Click **'See More >'** to view a complete list of all the prior and upcoming appointments in Health Profile.

Exercise

Purpose: You want to upload and track wearable exercise data.

The **'Exercise'** icon displays your current week's exercise mileage with icons reflecting type of exercise (walking, running, biking, or swimming). Each bar is color coded to indicate the type of exercise (walking, running, biking, or swimming) with the weekly total for each type listed below the respective icons.

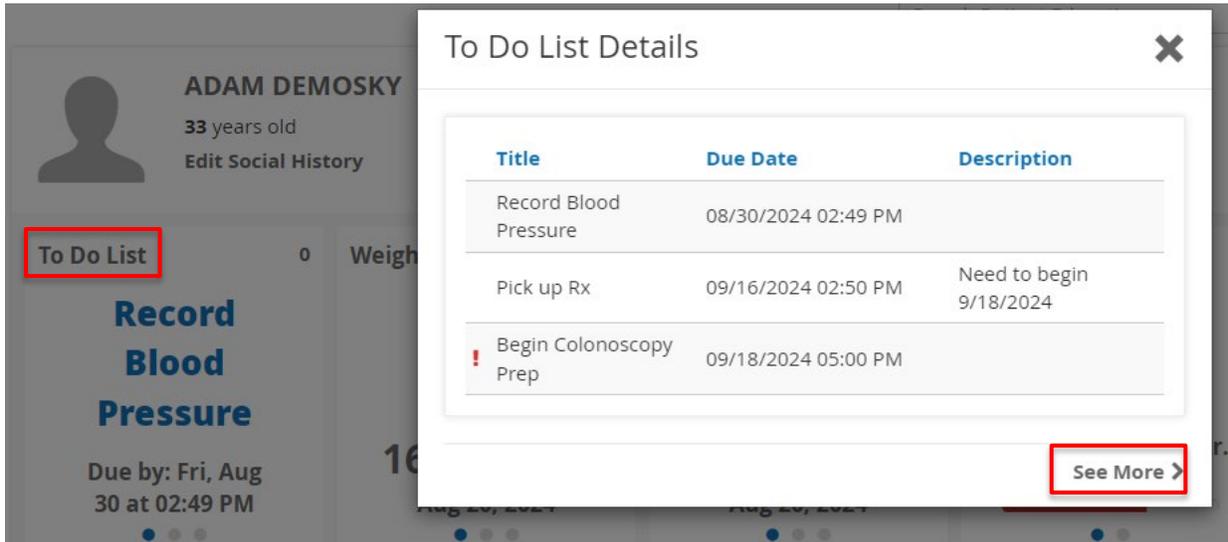
Click on **'See More>'** to view a complete list of all recorded exercise in the Health Profile application.



To Do List

Purpose: You want to create a to-do list with reminders for upcoming events.

From the *My Dashboard* page, click the **'To Do List'** icon to see up to three upcoming to-do reminders.



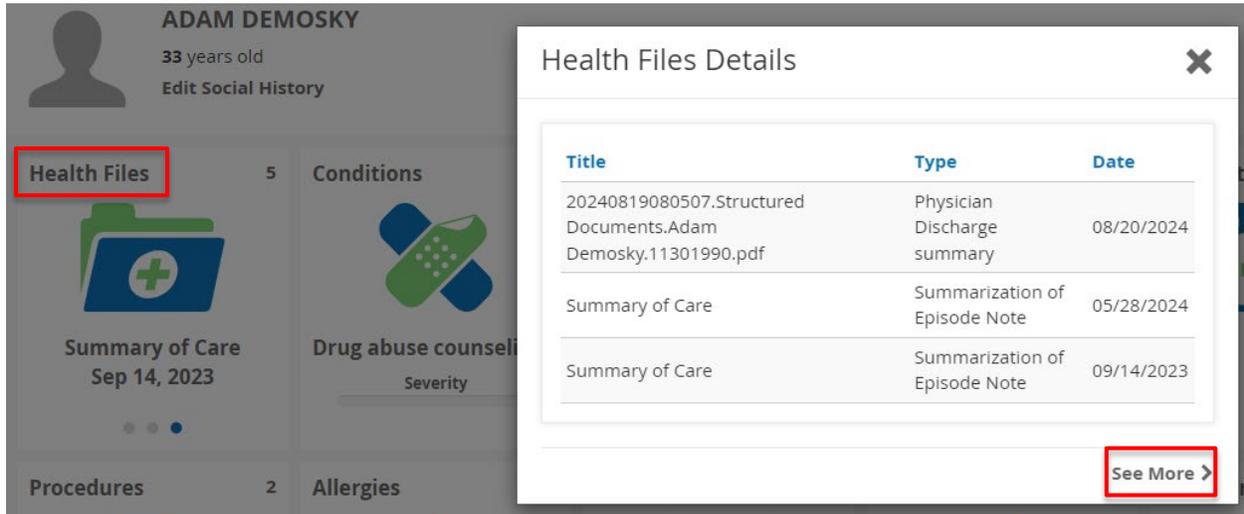
Click **'See More >'** to view a complete list of all previous and upcoming items on the to-do list in the Health Profile application. Each entry shows the title, due date, and description of the task.



Other

Health Files

The Health Files widget lists the last three Continuity of Care documents (e.g. summary of episode note) your providers have sent to Connie.



The screenshot shows a patient profile for ADAM DEMOSKY, 33 years old. The 'Health Files' widget is highlighted with a red box. A modal window titled 'Health Files Details' is open, displaying a table of health files. The table has three columns: Title, Type, and Date. The first row shows a structured document from 08/20/2024. The second and third rows show summaries of care from 05/28/2024 and 09/14/2023. A 'See More >' button is highlighted with a red box at the bottom right of the modal.

Title	Type	Date
20240819080507.Structured Documents.Adam Demosky.11301990.pdf	Physician Discharge summary	08/20/2024
Summary of Care	Summarization of Episode Note	05/28/2024
Summary of Care	Summarization of Episode Note	09/14/2023

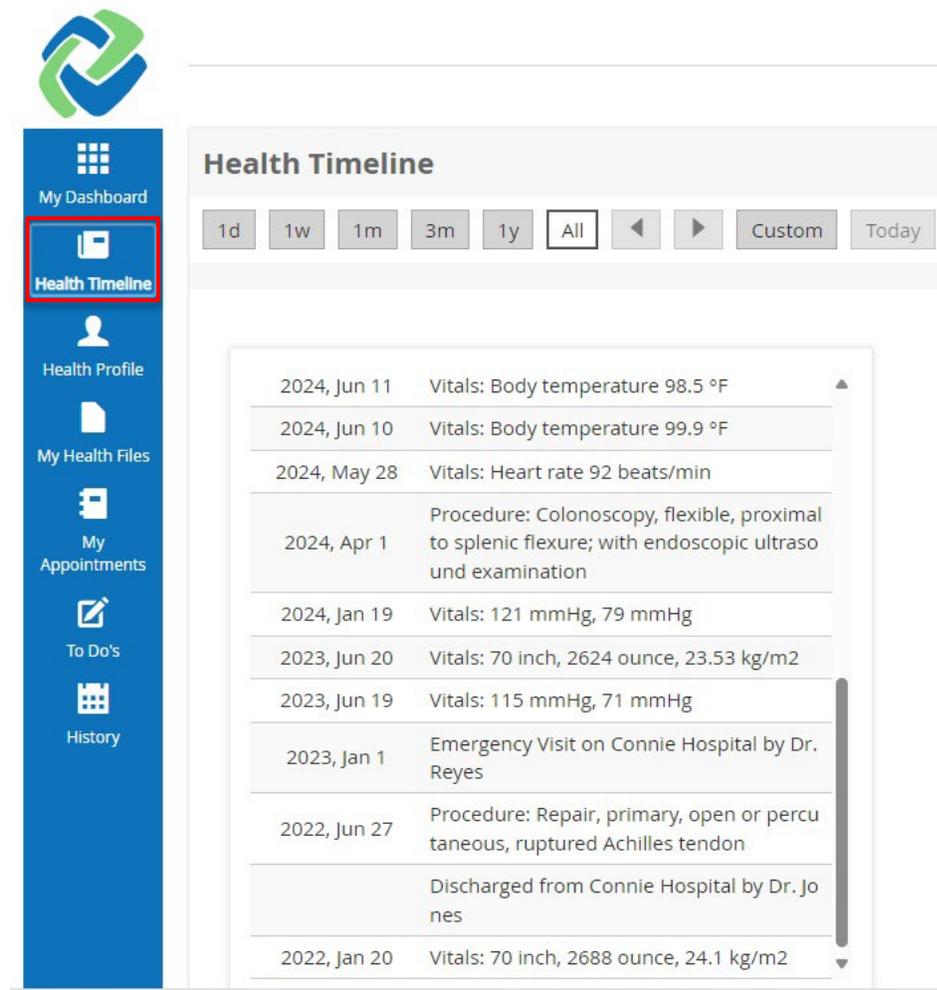
Click '**See More >**' to view a complete list of all recorded health files in My Health Files. More information about the features of the My Health Files application are described below.

Health Timeline

The Health Timeline function can be accessed from any Patient Connect page by clicking on 'Health Timeline' in the blue sidebar. The Health Timeline shows when health data has been received into your account. These events are displayed in order of receipt; most recent first.

Purpose: You want to know when certain files were uploaded to your account.

Navigate to the *Health Timeline* page by clicking the *Health Timeline* icon on the **blue** sidebar.



The screenshot displays the Health Timeline interface. On the left is a blue sidebar with navigation icons and labels: My Dashboard, Health Timeline (highlighted with a red box), Health Profile, My Health Files, My Appointments, To Do's, and History. The main content area is titled "Health Timeline" and includes a filter bar with options: 1d, 1w, 1m, 3m, 1y, All (selected), navigation arrows, Custom, and Today. Below the filter bar is a scrollable list of health events:

2024, Jun 11	Vitals: Body temperature 98.5 °F
2024, Jun 10	Vitals: Body temperature 99.9 °F
2024, May 28	Vitals: Heart rate 92 beats/min
2024, Apr 1	Procedure: Colonoscopy, flexible, proximal to splenic flexure; with endoscopic ultrasound examination
2024, Jan 19	Vitals: 121 mmHg, 79 mmHg
2023, Jun 20	Vitals: 70 inch, 2624 ounce, 23.53 kg/m2
2023, Jun 19	Vitals: 115 mmHg, 71 mmHg
2023, Jan 1	Emergency Visit on Connie Hospital by Dr. Reyes
2022, Jun 27	Procedure: Repair, primary, open or percutaneous, ruptured Achilles tendon
	Discharged from Connie Hospital by Dr. Jones
2022, Jan 20	Vitals: 70 inch, 2688 ounce, 24.1 kg/m2

Health Profile

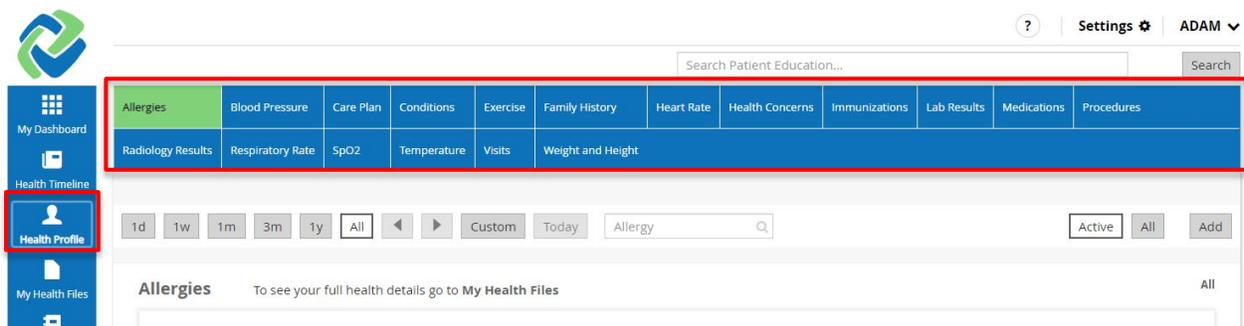
The Health Profile section can be viewed by selecting 'Health Profile' in the blue sidebar. The Health Profile function allows the user to view and edit their health record.

View Records

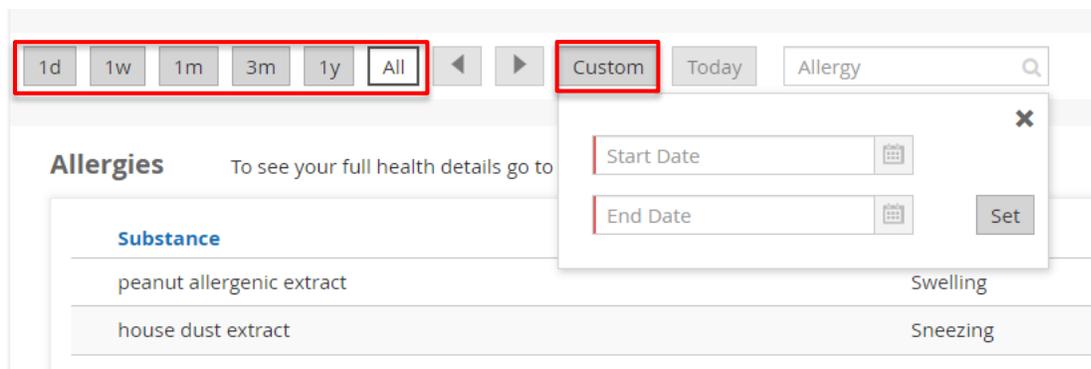
Purpose: You would like to view your health record.

Click on the '**Health Profiles**' button on the **blue** sidebar to access the medical record.

To view and edit the different sections of the record (e.g. Blood Pressure, Heart Rate, etc.), click on the **blue** tabs at the top of the page.



To change the date range for records to view in each category, select one of the preset buttons or click '**Custom**' to insert your own range of dates.



To toggle the view of the health record between a list and a graph (available for all categories except Allergies and Conditions, Procedures, Care Plan, Devices, Family History, Goals, Health Concerns, Immunizations, Radiology Results, SpO2, and visits to the list) click on the list and bar graph icons to the far right of the date range buttons.

Blood Pressure To see your full health details go to [My Health Files](#) All

Systolic	Diastolic	Date
117 mmHg	76 mmHg	08/20/2024 10:43 AM
121 mmHg	79 mmHg	01/19/2024 10:50 AM
115 mmHg	71 mmHg	06/19/2023 10:51 AM

For categories with a Status column (for Allergies, Conditions, Medications, and Health Concerns) your view defaults to Active records. To toggle the view of the complete record between active and all records, click on the **'Active'** or **'All'** buttons on the menu to the far right of the date range buttons.

Conditions To see your full health details go to [My Health Files](#) All

Name	Severity	Onset Date	Status
Rheumatic arthritis		02/28/2024	Resolved
Pneumonia		05/24/2023	Active
Pneumonia due to other specified organism (483.8)			Active

Edit Records

Purpose: You would like to edit your health record.

Note: You are only able to delete records that you have added to your Health Profile. You are not able to edit or delete records Connie has received from your providers. Connie is not able to share records you have added with your medical providers.

To add a new record to the Health Profile, click the **'Add'** button on the top right of the page. To edit a record, click on the listed record. To delete a record, click on the trashcan icon to the far right of that record.

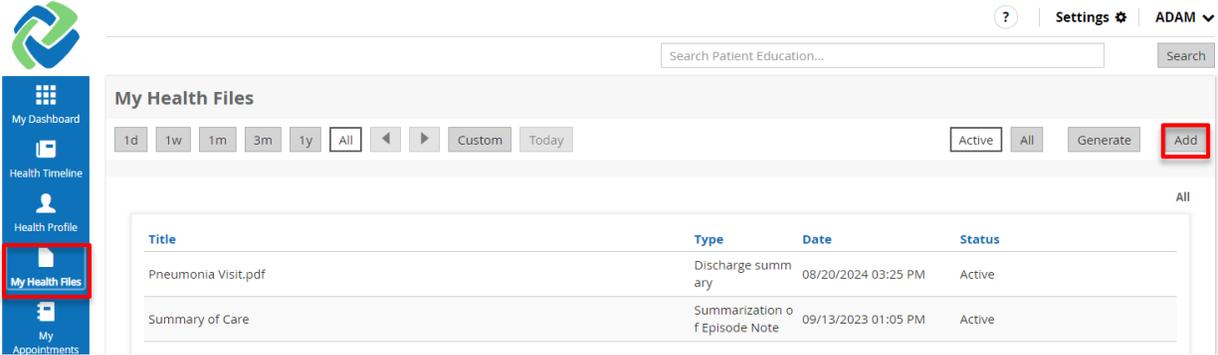
Allergies To see your full health details go to [My Health Files](#) All

Substance	Reaction	Date	Status
peanut allergenic extract	Swelling	08/20/2024	Active
house dust extract	Sneezing	08/20/2024	Active

My Health Files

View/Add Files

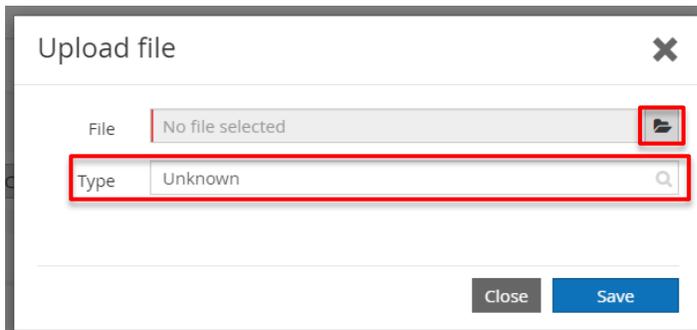
On the **blue** sidebar, select **'My Health Files'** to view a list of all files that have been sent to, or you uploaded into, Connie Patient Connect.



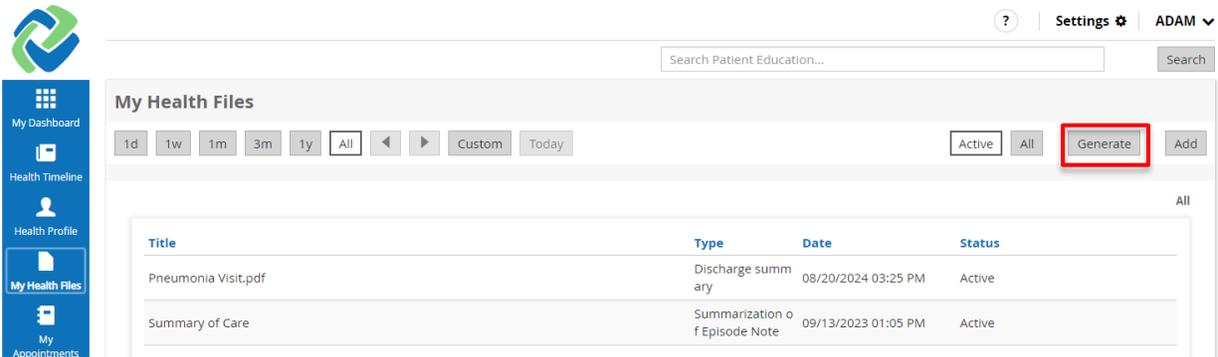
Select “add” to upload your own files.

Click on the folder icon in the dialog box to navigate to the file you want to upload.

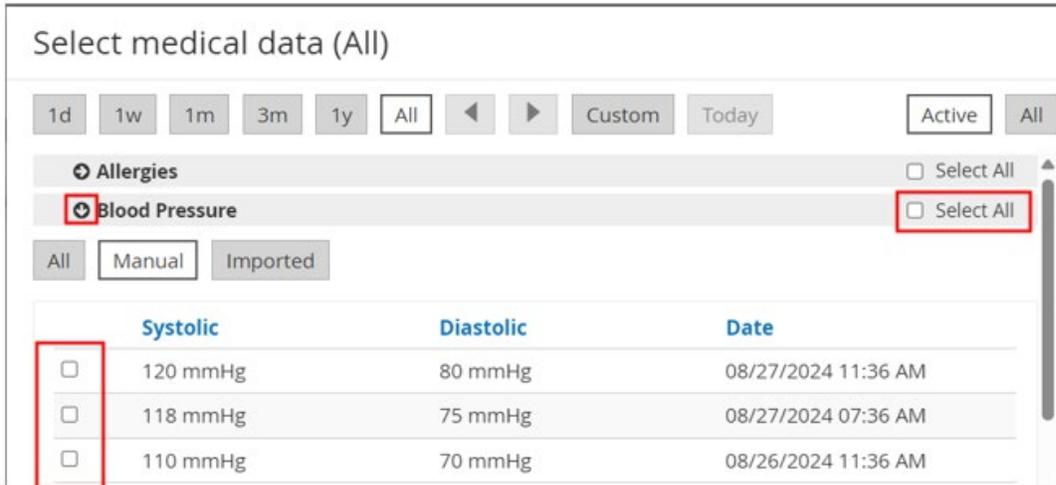
Begin typing in the “Type” field to search for and identify the appropriate document type uploaded. Leave blank if you are unable to find an appropriate match.



Creating Documents from My Health Files
Select “Generate” to create a document from your health records.



To select information you can click on the drop down arrow next to the category to select specific records or you can click on “Select All” to add all the records for that category



Once you have completed your selections, categories with some or all records selected will highlight in the upper section of the dialogue box, and the lower box will populate with selected records.

Select medical data (All)

1d 1w 1m 3m 1y All ◀ ▶ Custom Today Active All

Conditions	<input type="checkbox"/> Select All
Family History	<input type="checkbox"/> Select All
Heart Rate	<input type="checkbox"/> Select All
Health Concerns	<input type="checkbox"/> Select All
Immunizations	<input checked="" type="checkbox"/> Select All
Lab Results	<input checked="" type="checkbox"/> Select All
Medications	<input type="checkbox"/> Select All
Procedures	<input type="checkbox"/> Select All
Radiology Results	<input type="checkbox"/> Select All
Respiratory Rate	<input type="checkbox"/> Select All
SpO2	<input type="checkbox"/> Select All
Temperature	<input type="checkbox"/> Select All
Visits	<input checked="" type="checkbox"/> Select All
Weight and Height	<input type="checkbox"/> Select All
Social History	<input type="checkbox"/> Select All

Conditions:

Name: Pneumonia due to other specified organism (483.8) **Status:** Active

Immunizations: all items selected

Lab Results: all items selected

Procedures:

Type: Colonoscopy, flexible, proximal to splenic flexure; with endoscopic ultrasound examination

Visits: all items selected

Document name

Close

Name the document and select “Generate as PDF” or “Generate as CCDA (XML)”.

Note: a CCDA is a standard structure used in health information exchange.

The generated document will now be available under your ‘My Health Files’ to download.

My Health Files

1d 1w 1m 3m 1y All ◀ ▶ Custom Today Active All Generate Add



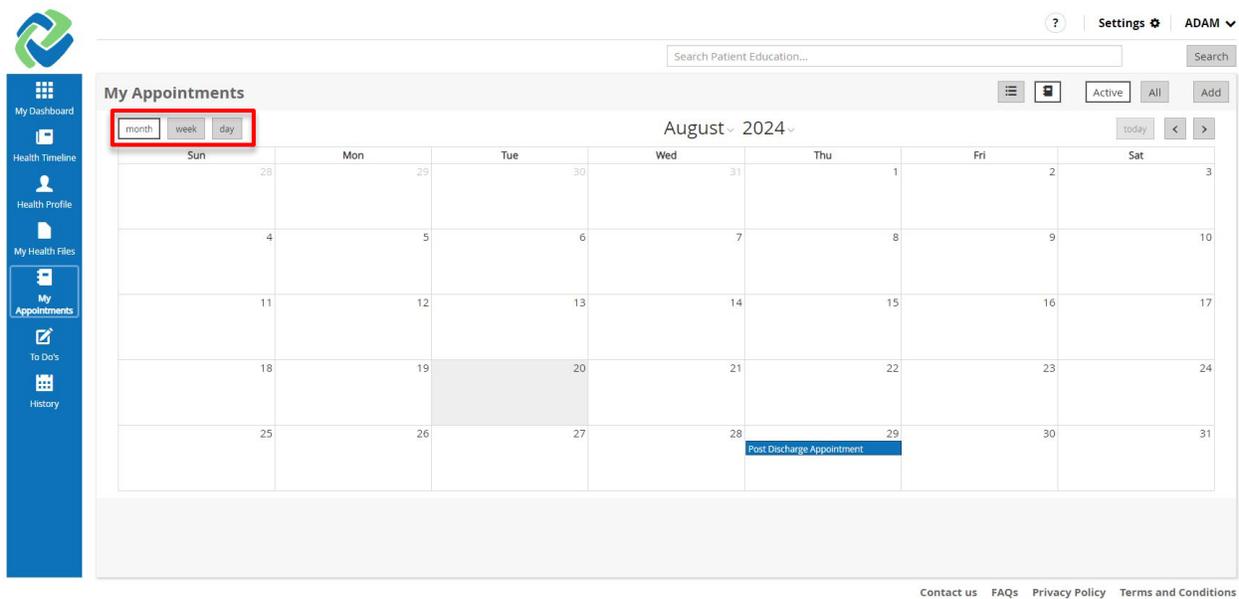
Title	Type	Date	Status	
All blood pressure readings.pdf	Summarization of episode note	08/27/2024 11:52 AM	Active	Download   
Blood pressure.xml	Summarization of episode note	08/27/2024 11:50 AM	Active	

My Appointments

Purpose: You want to add or edit appointments to your calendar.

The Appointments function can be accessed by clicking on **'My Appointments'** in the **blue** sidebar. This feature allows you to add an appointment to *your* calendar, as well as any relevant details about the event.

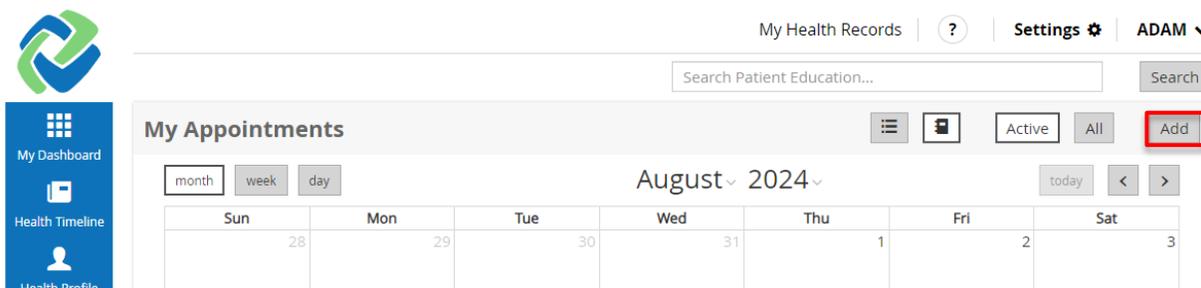
The *My Appointments* page can be viewed as a list or calendar (with monthly, weekly, or daily view options). To toggle between these views, click icons at the top right of the page. Select the calendar...



...or list icon.



To add a new appointment from the calendar view or list view, click the **'Add'** button at the top right of the page.



Alternatively, in the *Month* calendar view, create a new appointment by double clicking the day (or hour, if in the *Day* view) on which the event will take place.

Add Appointment ✕

Title

Location

Practitioner

Date

Priority Normal High

Type

Description

Status Active Completed Cancelled

Remind me

Once the appointment pop-up window appears, enter in the relevant information and click **'Save'** to create the event.

The Title, Type, Date, and Status fields are required; the appointment will not be saved if these fields are not completed.

Insert appointment title, provider name, and date of appointment

Enter in the title of the appointment (e.g. "Follow-up for cold" or "Well woman exam"), the location of the appointment and the practitioner's name in the appropriate fields. For the Date field, either type in the date or click the calendar icon and choose the day from a monthly calendar. Then, enter the time of the appointment, clicking the AM/PM button to toggle between the two.

Set priority level

All appointments will default to **'Normal'**, but there is an option to flag an important appointment by clicking **'High'** for the *Priority* field. This will cause a red exclamation point to appear next to the appointment in the list/calendar view of appointments.

Add Appointment ✕

Title:

Location:

Practitioner:

Date:

Priority: Normal High

Type:

Description:

Status: Active Completed Cancelled

Remind me:

21	22	23	24
28	29	30	31

↓

Annual Physical Exam	
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Set type of appointment

As shown in the list below, there are several options for categorizing the appointment. Choose the appointment category by clicking the down arrow, or anywhere within the Type field.

Title:

Location:

Practitioner:

Date:

Priority: Normal High

Type:

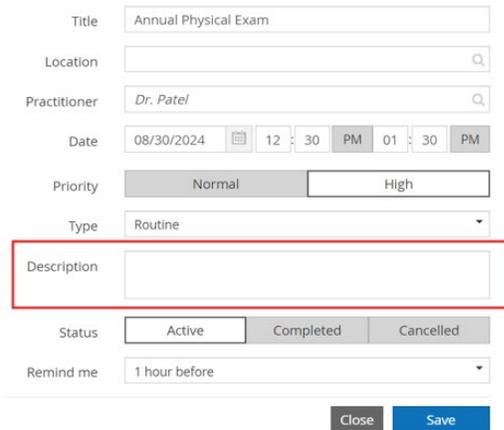
Description:

Status: Routine Walkin

Remind me:

Insert description of appointment

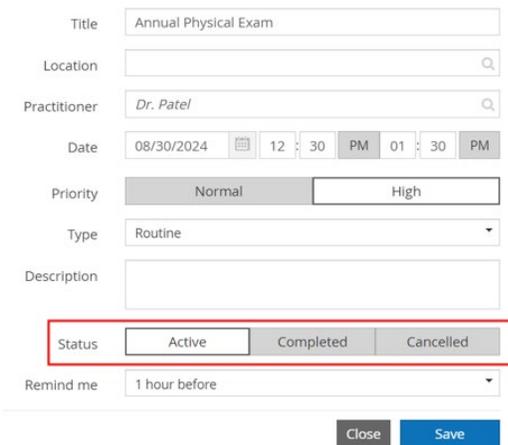
Free-type any relevant information in the Description field.



The image shows a form for creating an appointment. The fields are: Title (Annual Physical Exam), Location (empty), Practitioner (Dr. Patel), Date (08/30/2024, 12:30 PM), Priority (Normal/High), Type (Routine), Description (empty, highlighted with a red box), Status (Active/Completed/Cancelled), and Remind me (1 hour before). There are Close and Save buttons at the bottom.

Select a status

The status of any new appointment will default to Active. To change the status to Completed or Cancelled, click the options in the Status field.



The image shows the same appointment form as above, but with the Status field (Active/Completed/Cancelled) highlighted with a red box.

Any past appointment that is not marked as Completed will automatically be marked “overdue” by Connie Patient Connect.

Sick visit

Start: Mon, Aug 26 at 12:50 PM
End: Mon, Aug 26 at 01:05 PM

Type: Walkin
Practitioner: Dr. Patel
Status: Overdue

Sick visit

To Do's

The To Do's function can be accessed from any Connie Patient Connect page by clicking on **'To Do's'** in the **blue** sidebar. This feature allows you to manage your action items ("To Do" items). The items appear on a To Do calendar, as well as any relevant details you include about the event.

The *To Do's* page can be viewed as a list or calendar (with monthly, weekly, or daily view options). To toggle between these views, click the list or calendar icons at the top right of the page. The list view will include all to do items. The calendar view will only display to dos scheduled within the calendar timeframe.

Calendar view of To Do items:

The screenshot shows the 'To Do's' interface in calendar view for September 2024. At the top, there are view options: 'month', 'week', and 'day'. The 'month' option is highlighted with a red box. To the right, there are icons for list and calendar views, with the calendar icon also highlighted in red. Further right are buttons for 'Active', 'All', and 'Add'. The calendar grid shows dates from 1 to 30. Two items are visible: 'Pick up Rx' on Monday, 9/16, and 'Begin Colonoscopy Prep' on Wednesday, 9/18.

List view of the To Do items:

The screenshot shows the 'To Do's' interface in list view. At the top, there are view options: '1d', '1w', '1m', '3m', '1y', and 'All'. The 'All' option is highlighted with a red box. To the right, there are icons for list and calendar views, with the list icon also highlighted in red. Further right are buttons for 'Active', 'All', and 'Add'. Below the view options, there are navigation buttons: '1d', '1w', '1m', '3m', '1y', 'All', '<', '>', 'Custom', and 'Today'. The list of items is as follows:

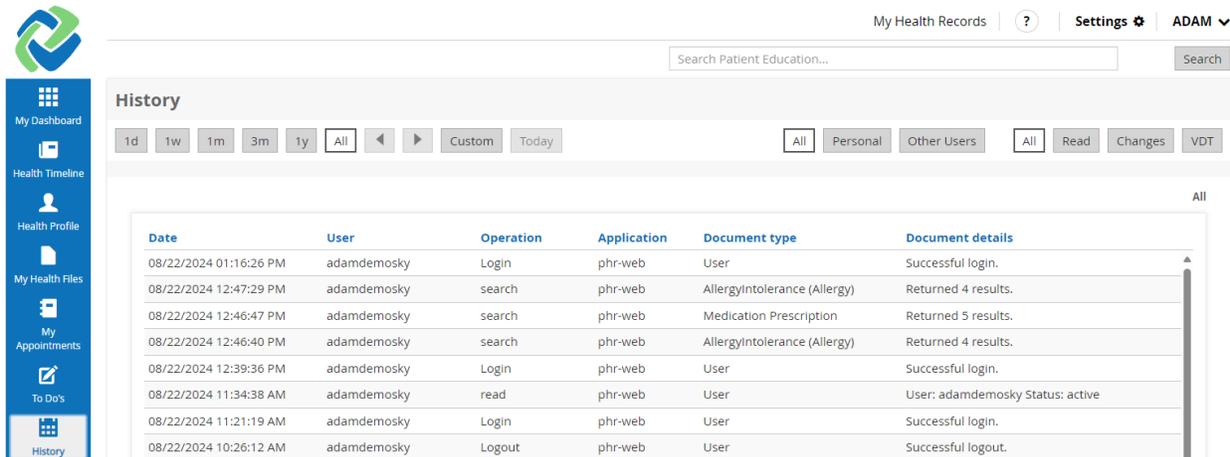
Title	Status	Due Date	Description
Begin Colonoscopy Prep	Active	09/18/2024 05:00 PM	
Pick up Rx	Active	09/16/2024 02:50 PM	Need to begin 9/18/2024
Record Blood Pressure	Active	08/30/2024 02:49 PM	

History

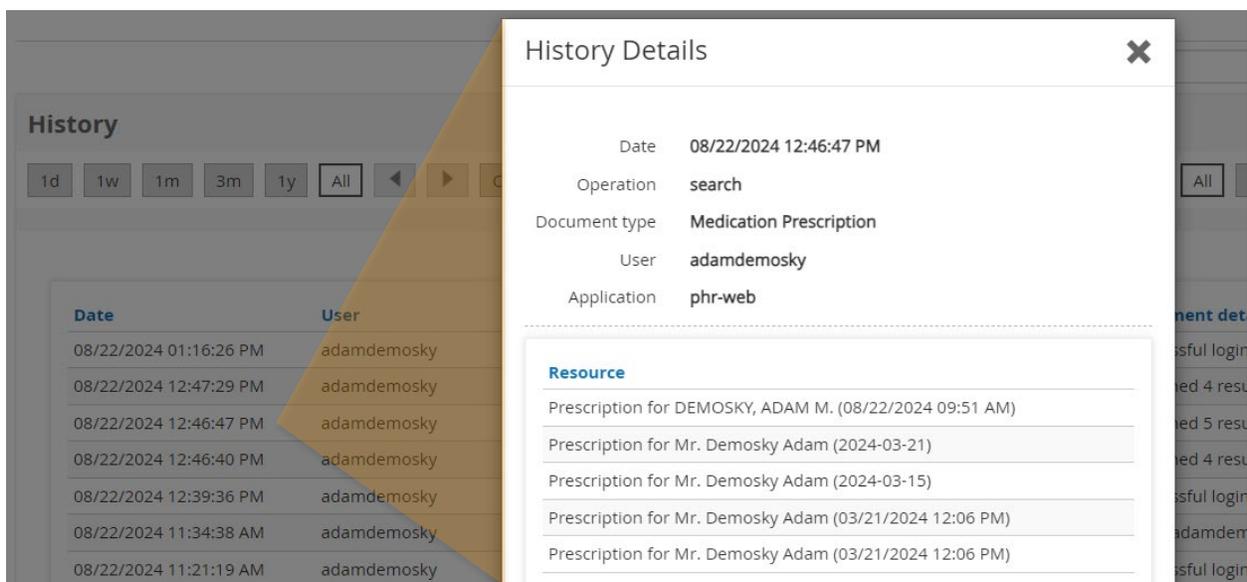
Access Usage History

Purpose: You want to view a log of who has accessed your health files, and when, as well as other actions taken on the platform (e.g. sending messages, receiving files, and adding records).

Navigate to the *History* page by clicking the calendar icon on the **blue** sidebar.



To view more details about an action taken on the platform, click the row of each entry. Certain history have details but not all.



To exit the *History Details* pop-up window, click either the **'X'** at the top right corner of the window, or the **'Close'** button at the bottom right.

History Details



Date 08/22/2024 12:46:47 PM
Operation search
Document type Medication Prescription
User adamdemosky
Application phr-web

Resource

Prescription for DEMOSKY, ADAM M. (08/22/2024 09:51 AM)
Prescription for Mr. Demosky Adam (2024-03-21)
Prescription for Mr. Demosky Adam (2024-03-15)
Prescription for Mr. Demosky Adam (03/21/2024 12:06 PM)
Prescription for Mr. Demosky Adam (03/21/2024 12:06 PM)

Close