

Leveraging Your Patient Portal To Access Your Records

Getting Started

We will email you a link to our HIPAA-compliant patient portal:

1. Click on the link in our email and go to the OptiMantra patient portal page: <https://www.optimantra.com/optimus/om/patient/login> and select **New Sign Up**
2. Add your **Email** address and **Send Email** to get your link
3. Click on the email link you get from support@optimantra.com to confirm your email
4. Set your new 8+ digit password (include an upper and lower case letter, symbol and number) and log in

The image displays four screenshots illustrating the patient portal login and password reset process:

- Patient Portal Login:** A form with fields for Email and Password, a checkbox for "I accept the Terms of Use (User Agreement)", and buttons for "Login", "Reset Password", and "New Sign Up". A link for "Direct Access To Video Chat" is at the bottom.
- Set or Reset Password:** A form asking for the user's email address, with options to "Get link in email" or "Get code in text" via "Send Email" or "Send Text" buttons. A note states: "Note: Your account must have a mobile number set to receive a code via text message." A "Back" button is at the bottom.
- Reset Password (Email):** A screenshot of an email from support@optimantra.com. The email body says: "Please goto the following link to reset your password: <https://www.optimantra.com/optimus/om/public/resetPassword?token=588205PAT>. Your temporary password is 588205".
- Reset Password Patient Portal:** A form for creating a new password. It includes a "Login (Email)" field with "lucy@optimantra.com" entered, a "New Password" field with a strength indicator, and a "Confirm New Password" field. A "Reset My Password" button is at the bottom.

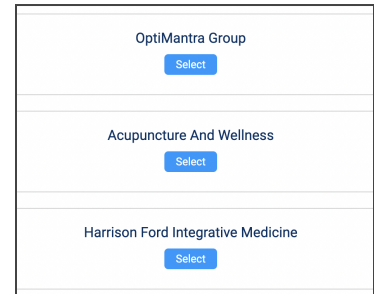
Troubleshooting Tips

- **All log-in information you enter - your email address, first name, and date of birth - must correspond exactly with your patient file information for security reasons.** Please be sure that the information you enter is identical to the information we have on your patient file.
 - Spelling on your email address matters! so don't add extra periods or spaces and check spelling (e.g., "com" vs "con")
 - If you are in the system as "Abigail" and you put "Abby" you won't be able to log in
 - Extra spaces, changes in case (upper vs. lower) or characters can cause errors
- **If you don't get the email, wait a few minutes and then check your spam folder** (add support@optimantra.com to your Inbox to ensure you get future emails delivered to you)
- **If you have a cell phone number on file, you can also use it to set your password by text message**
- If you are continuing to run into issues, please reach out to your provider to confirm you have the right information on file

Special Log-in Cases

You have an account with multiple clinics that use OptiMantra

Upon login, if OptiMantra notices the same email on more than one clinic account - as can happen in larger metro areas where you may be seeing multiple clinics - you can select the right clinic account that you want to log into



A screenshot of a selection menu with three items, each with a blue 'Select' button below it:

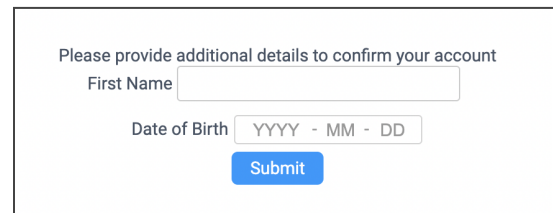
- OptiMantra Group
- Acupuncture And Wellness
- Harrison Ford Integrative Medicine

You have multiple accounts within a clinic under the same email address (ex. for family members)

If OptiMantra notices the same email address on multiple patient accounts - common with caregiver/dependent accounts - the program will ask for confirmation to find the right account you are looking for:

Add the **first name and date of birth of the account you want to access** (which may not necessarily be your own)

When you want to switch patients, just log out and back into your other patients



A screenshot of a confirmation form with the following fields and a button:

Please provide additional details to confirm your account

First Name

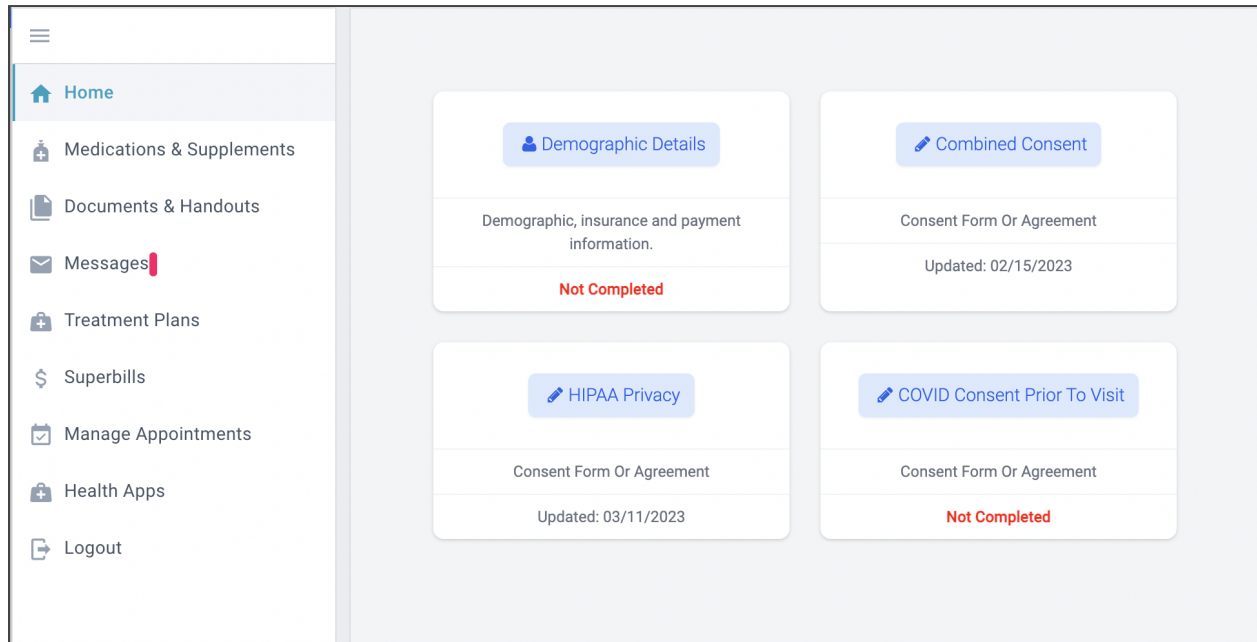
Date of Birth

Note, we keep these related accounts as separate log-ins to reduce the likelihood of users mistakenly entering medical information on the wrong patient

Navigating the Patient Portal

Once you have successfully logged in, you will see a landing page with a navigation bar on the left and list of forms

- The exact information visible will depend on your upcoming appointments and history with our practice



- **Medication & Supplements** (if enabled by your practice)
 - You can see the same medication list that we have for you under Dashboard > All Drugs & Meds; you can add new entries and request changes to existing entries
- **Documents & Handouts**
 - You can upload your documents, as well as see documents and labs that we have shared with you
- **Messages**
 - You can send and respond to messages from our practitioners and staff here in a HIPAA/PHIPA-compliant way
- **Treatment Plans/Superbills** (if enabled by your practice)
 - You can access PDFs of your treatment plans and the superbill
- **Manage Appointments** (if enabled by your practice)
 - You can see your upcoming appointments and also book new appointments