AVALA®

MANAGING YOUR PATIENT PORTAL ACCOUNT

Change a Password

You can change your password anytime from the Settings page.

To change your password:

1. From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
2. Under Password, select **Reset Password**. The Reset Password page is displayed.
3. Enter your current password in the Current Password box.
4. Enter a new password in the Enter Password box that meets your organization's requirements.
   Note: Each organization has different rules for the length and characters required in a password. Expand the password policy information to view the password requirements.
5. Confirm the new password in the Confirm Password box.
6. Select **Reset**.
7. You might be asked to confirm your account using a one-time passcode. This passcode ensures your account's security.

Your password is reset and a confirmation message is displayed.

Recover a Forgotten Password

If you forgot your password, you can reset it after you verify your identity. Passwords are changed from the sign-in page.

To recover your password:

1. Access the sign-in page and select **Forgot password** under the Password box. The Forgot Password page is displayed.
2. Enter your username and select **Next.** A confirmation message is displayed. If the username you entered is associated with a registered

account, a message is sent to that email address with instructions about how to reset your password.
Tip: Your username might be the same as your email.
3. Find and open your email and select the link for the reset password process.
Tip: Email messages might be located in your Spam folder. Be sure to also add the organization to your safe senders list.
4. Select the **Reset Password** in the email. The Reset Password page is displayed.
5. Enter a new password that meets your organization's requirements.
Note: Each organization has different rules for the length and characters required in a password. Expand the password policy information yo view the password requirements.
6. Enter the same password in the Confirm Password box.
7. Select **Continue** to continue to the Sign In page.
8. On the Sign In page, enter your username and new password to sign in.

Sign in to a Temporarily Locked Account

Your account might become temporarily locked if you try to sign in unsuccessfully five times in a row. This temporary lockout features keeps your health record secure by making others cannot keep trying to guess your password. The lockout duration is 24 hours. After the lock-out period you can try to log in again or reset your password.

Note: After 24 hours, if you provide the incorrect username and password five additional times, you are locked out for another 24-hour period.

If your account becomes locked while trying to create a new account from an invitation, contact your provider's office or care team to get a new invitation.

If your account becomes locked while trying to log in to an existing patient portal account, your account is permanently locked. Contact Help (available from the sign-in page) to request that access your account be restored.

Sign Out

Sign when you are done using the portal to protect the security of your account and personal details. Logging out is especially important if you are using a shared computer.

Note: The patient portal automatically logs you out after approximately 15 minutes of inactivity.

To sign out:

1. From the Home dashboard, select the **User (Switch Profile)** menu.
2. Select **Sign Out** to sign out and return to the Sign In page.

Switch Language

You can set the patient portal's language from the Sign-in page by selecting **Language** 🌐. You can also change the language anytime from the User (Switch Profile) menu.

To switch the current language:

1. From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
2. Select **Account** (if it is not already selected). The Account tab is displayed.
3. Select the drop-down list under **Display Language**. A list of each language available to you is displayed. Select your preferred language. The patient portal refreshes to display all content in the selected language and returns you to the dashboard.

Tip: Switch the language before signing in to the patient portal to ensure that the portal is displayed in that language each time you sign in.

Switch Accounts as an Authorized Representative (Proxy User)

The authorized representative (also known as a proxy user) is commonly the caretaker or legal guardian of the patient and has the authority to carry out health-related tasks on behalf of the patient. Authorized representatives can have multiple connected accounts, including one for themselves.

Note: Ask your provider if you want to add or remove a connected account.

If you are an authorized representative connected to multiple accounts, you can switch accounts on the User (Switch Profile) page:

1. After you sign in, open the User (Switch Profile) menu and select **Switch User**.
2. Select another account to switch your view to that account. Your view of the patient portal is updated to display only information for the selected patient. You can change the profile, schedule appointments, and complete patient portal activities as if you are that patient.
3. When you are ready to return to your own account, select **Switch User** from the User (Switch Profile) account and select your own account again.
   Note: If you sign out while viewing another account, the next time you sign in you are returned to your own account. Select the user's account from the User (Switch Profile) drop-down list to return to that other account.

Authorized representatives generally have all of the same capabilities as the patient, themselves, with exception to information with sensitivity restrictions. Depending on the confidentiality and sensitivity restrictions applied from set by your organization and the age of the patient, you may be unable to view some health record information. See the View Sensitive Health Record History topic for more information.

Request Removal of an Authorized Representative (Proxy) Connection

It is the responsibility of the authorized representative (also known as a proxy user) to inform their provider immediately of any legal authority changes or when the connection of another account needs to be removed.

Contact your provider's office or care team if you want to remove your account's connection to another account.
Tip: You can use the Messaging feature to send your provider a message that requests changes to confidentiality, but your care team might require you to prove your identity in person.

Once a connection is removed, the authorized representative is unable to access the other account or its information.

View Access Logs

The access log displays a list of actions (called events) performed by you or your authorized representative in the health record.

Note: Your organization might mark certain types of test results or vital signs as Sensitive. Sensitive information cannot be viewed by authorized representatives of protected minors. See the Access Sensitive Health Record Details topic for more information.

To view the Access Logs for an account:

1. From the User (Switch Profile) menu, select **Settings**.
2. Select the **Access Logs** tab. The Access Logs tab is displayed.
   Tip: This page includes information only for the currently selected account. If you manage the accounts for others, select the User (Switch Profile) menu to switch the user. Switching the user changes the page to display information for the selected person.

Access log details can include:

- Who the record was accessed by (self or authorized representative)
- What action was taken, such as:
  - Signed in
  - Viewed
  - Modified
  - Removed or deleted
  - Downloaded
  - Printed
  - Sent
- The time the action was taken
- The type of information being accessed, such as:
  - Allergies
  - Clinical Notes
  - Health Conditions
  - Immunizations
  - Medications
  - Procedures
  - Reports
  - Test Results
  - Visit Summaries

Additionally, the Search bar lets you search the access logs by key word.

Update Account Settings

You can update your account settings anytime.

To update your account settings:

- From the User (Switch Profile) menu, select **Settings**. The Settings page is displayed.
- Select the **Account** tab (if it is not already selected). The Account tab is displayed.
- In the Display Language section, optionally select the language list to switch the current language, then select **Set Language**.
- In the Password section, optionally select **Reset Password** to change your password.
- In the Legal section, optionally, select the download links for **Terms of Use** or **Privacy Policy** to view your organization's Terms of Use and privacy policies.

View, Add, and Edit Profiles and Personal Details

You can access your profile from the User (Switch Profile) or the Ask Oracle menu.

You can view the following information in your profile:

- Personal Details
- Financial
  - Financially Responsible
  - Insurance
- Care team
- Relationships
  - Emergency Contacts

See the topics below for information about these sections.

Personal Details

You can view and edit personal details (also called demographics) from the User (Switch Profile) page and also when you register or check in to an appointment. You might be unable to edit some details because your organization requires you to prove your identity.

Identity proofing is a process in which a trained agent (for example, front desk staff) collects and verifies information to prove that a patient is who they say they are. This step is typically performed for all new patients and again when the patient requests changes to key personal details, such as a name, date of birth, or email address. Your organization might have its own rules about how often you need to prove your identity and what types of information require it.

If your details are read-only, you can request these updates when you visit the office in person.

To manually add or edit personal details (as available to you):

1. From the User (Switch Profile) drop-down list, select **Profile**.
2. Scroll to the Demographics section. This section displays the information originally entered during the enrollment process.
3. Select **Edit** to editing personal details (as determined by your organization), such as:
    - Title and suffix
    - Preferred name (or nickname)
    - Preferred pronouns
    - Marital status
    - Birth sex
    - Sexual Orientation
    - Gender identity
    - Race and ethnicity
    - Preferred language
    - Address
    - Preferred contact method (email or text message)
    - Personal email address
    - Personal phone number
    - Work phone extension
4. When you are done making changes, select **Save**.

Financial - Financially Responsible

The financially responsible party (also called a guarantor) is the person who is responsible for paying for any health visits. This person might be yourself or an authorized representative.

You can add or edit the details for the financially responsible party, including the relationship to patient, and your insurance, secondary insurance, and policyholder information.

To add or edit your financially responsible party:

1. From the User (Switch Profile) menu, select **Profile**.
2. Scroll to the Financial section.
3. In the Responsible Party section, select **Add Financially Responsible** to add a responsible party. Alternatively, select **Edit** or **Remove** from the More Actions ··· menu to edit or remove an existing responsible party.
4. Add or update the responsible party's details legal first name, legal last name, date of birth, relationship to the patient, and phone number.
5. Optionally, enter additional details such as the title, address, and any other relevant details. You can also select **Remove** from the More Actions ··· menu to remove a responsible party.

   Tip: The information you enter is always stored securely and safely.
6. When you are finished updating the responsible party, select **Save**.

Financial - Insurance

To add or edit your insurance information:

1. From the User (Switch Profile menu, select **Profile**.
2. Scroll to the Financial section.
3. In the Insurance section, select **Add Insurance** to add an insurance carrier. (You can have up to three insurance carriers.) Alternatively, select **Edit** or **Remove** from the More Actions ··· menu to edit or remove an existing insurance carrier.
4. Add or update the insurance carrier's details.
   Tip: The order of insurance indicates the primary, secondary, and tertiary insurance carriers. Your care team uses this order when submitting claims.
   - Select **Take or Upload Photo** to scan your insurance card's bar code or take or upload a photo of your insurance card if no bar code is available or readable. If the card's bar code is readable,

the insurance information is filled in for you. Enter any missing details as needed.
    - Select **Enter Manually** to manually enter insurance information.
5. When you are done adding updating insurance, select **Save**.

Care Team

If you do not yet have a care team identified, contact your provider's office or care team and ask them to update your account to include your care team.

Relationships - Emergency Contacts

To add or edit your emergency contacts:

1. From the User (Switch Profile) menu, scroll to the Relationships section.
2. In the Emergency Contact section, select **Add Emergency Contact** to add an emergency contact. (You can have up to three emergency contacts.) Alternatively, select **Edit** or **Remove** from the More Actions ··· menu to edit or remove an existing emergency contact. You can also select **Remove** from the More Actions ··· menu to remove an emergency contact.
3. When complete, select **Save**