

Granting Portal Access TO ANOTHER USER

Patients with an active SOMC Patient Portal account can share health information with family and loved ones by following the steps below:

- » Users will need to either have an active portal account linked to the email you send the request to, or
- » Create a new Portal account from the invitation using the same email address SOMC has on file.

Southern Ohio Medical Center

Very Good things are happening here

1. Log onto your patient Portal via a PC, laptop, tablet or phone
2. Open up the **Account options** area and click on **Share My Portal**
3. From here click **Create Invitation**

The screenshot displays the Southern Ohio Medical Center patient portal. The top navigation bar includes the logo and the slogan "Very Good things are happening here". The main content area is titled "Profile" and has tabs for "Patient Information", "Contacts", and "Shared Access". The "Shared Access" tab is active, showing a "Shared Access" section with instructions: "Shared Access displays all users that have access to this patient's portal. To allow someone to access your MyHealth information, select the Create Invitation button below. You will have the opportunity to choose which areas of the portal this person will have access to before sending the invitation." A yellow box highlights the "Create invitation" button, with a red arrow pointing to it from step 3 of the instructions. A separate callout box on the right shows a zoomed-in view of the "Account options" menu, with a red arrow pointing to the "Share My Portal" option, which is also highlighted in yellow. The "Log Out" button is visible at the bottom of the callout.

4. Complete the fields for the person you want to invite, then click **Next**

Profile

Create an invitation

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify the email address with the person you are inviting. They must accept the invitation using the same email address.

1 Recipient — 2 Access Level — 3 Access Permissions — 4 Message — 5 Verification

Add recipient information

First name (required)

Last name (required)

Email (required)

Confirm email (required)

Relationship to patient (required)

5. Select to share **Standard** or **View Only** access, then click **Next**

Profile

Create an invitation

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify the email address with the person you are inviting. They must accept the invitation using the same email address.

Recipient — **2 Access Level** — 3 Access Permissions — 4 Message — 5 Verification

Select access level

Standard
This user will be able to view information and perform actions as permitted.

View Only
This user will be able to view information as permitted and submit payments. They will not be able to perform other actions, such as messaging a provider, requesting a medication renewal, or scheduling an appointment, etc.

6. From here you can select which permissions you would like to share. **Make your choices** then click **Next**

The screenshot shows the 'Profile' page with the 'Create an invitation' section. A progress bar at the top indicates five steps: 1. Recipient, 2. Access Level, 3. Access Permissions (highlighted with a blue box), 4. Message, and 5. Verification. Below the progress bar is a 'Back' button. The main heading is 'Select access permissions'. There are five checked checkboxes with their corresponding permissions listed below them: 'Clinical data' (Allergies, Appointments, Conditions, Health summary, Immunization certificate, Immunization history, Letters, Medical history, Medications, Messages, Questionnaires, Reports, Results, Scanned documents, Visit history), 'Family history', 'Download medical records', 'Non-clinical/social appointments', and 'Profile'. At the bottom, there are 'Next' and 'Cancel' buttons.

7. Add the custom message they will see when they receive the email invitation, then click **Next**

The screenshot shows the 'Profile' page with the 'Create an invitation' section. The progress bar now shows step 4, 'Message', highlighted with a blue box. Below the progress bar is a 'Back' button. The main heading is 'Add a custom message to be sent with your invitation.' Below this is a large text input field. At the bottom left of the input field, it says '1000 characters allowed'. At the bottom, there are 'Next' and 'Cancel' buttons.

8. Verify the information you entered, then click **Submit**

9. The invitee will receive an email invite with a link to accept the request

Profile

Create an invitation

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify the email address with the person you are inviting. They must accept the invitation using the same email address.

✓ Recipient — ✓ Access Level — ✓ Access Permissions — ✓ Message — 5 Verification

[Back](#)

Please review and verify the information below.
If something is incorrect or missing, select Back and correct the information on the appropriate page.

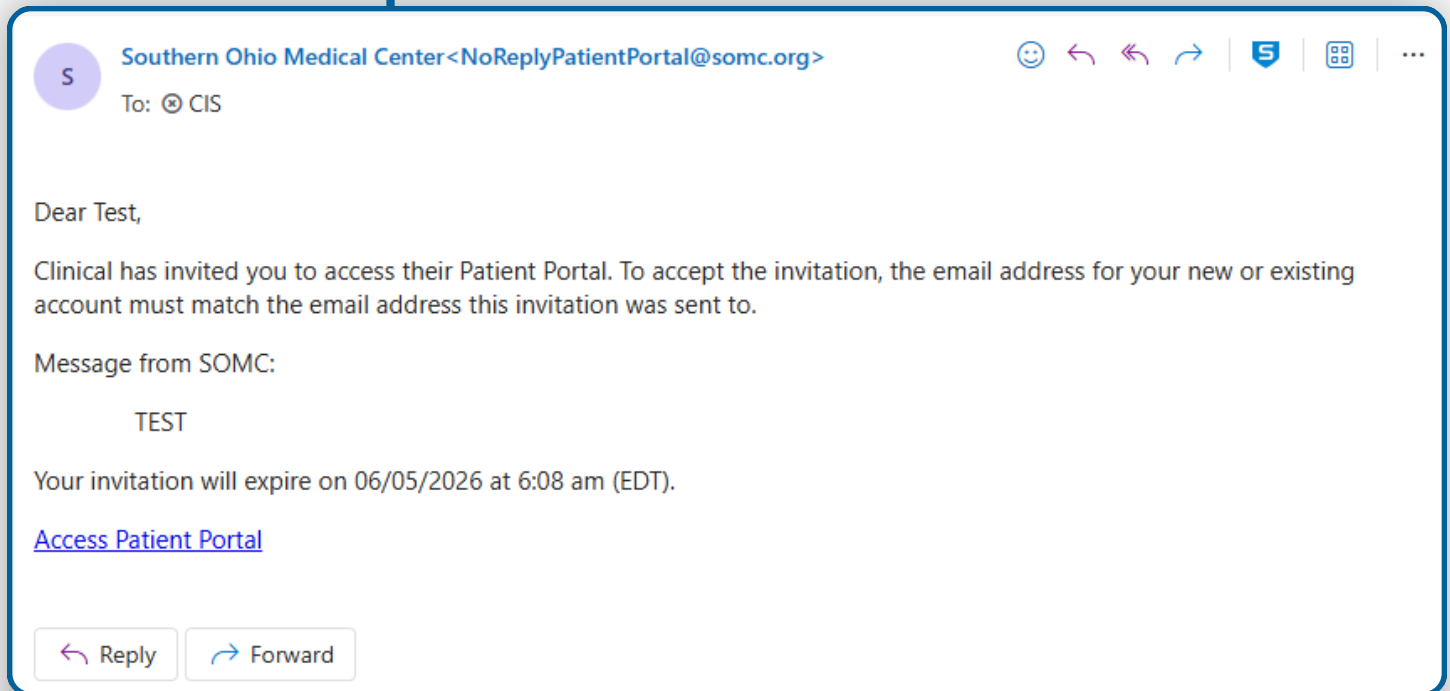
User information

Name	Relationship	Email
Test Patient	Brother	testpatient@somc.org

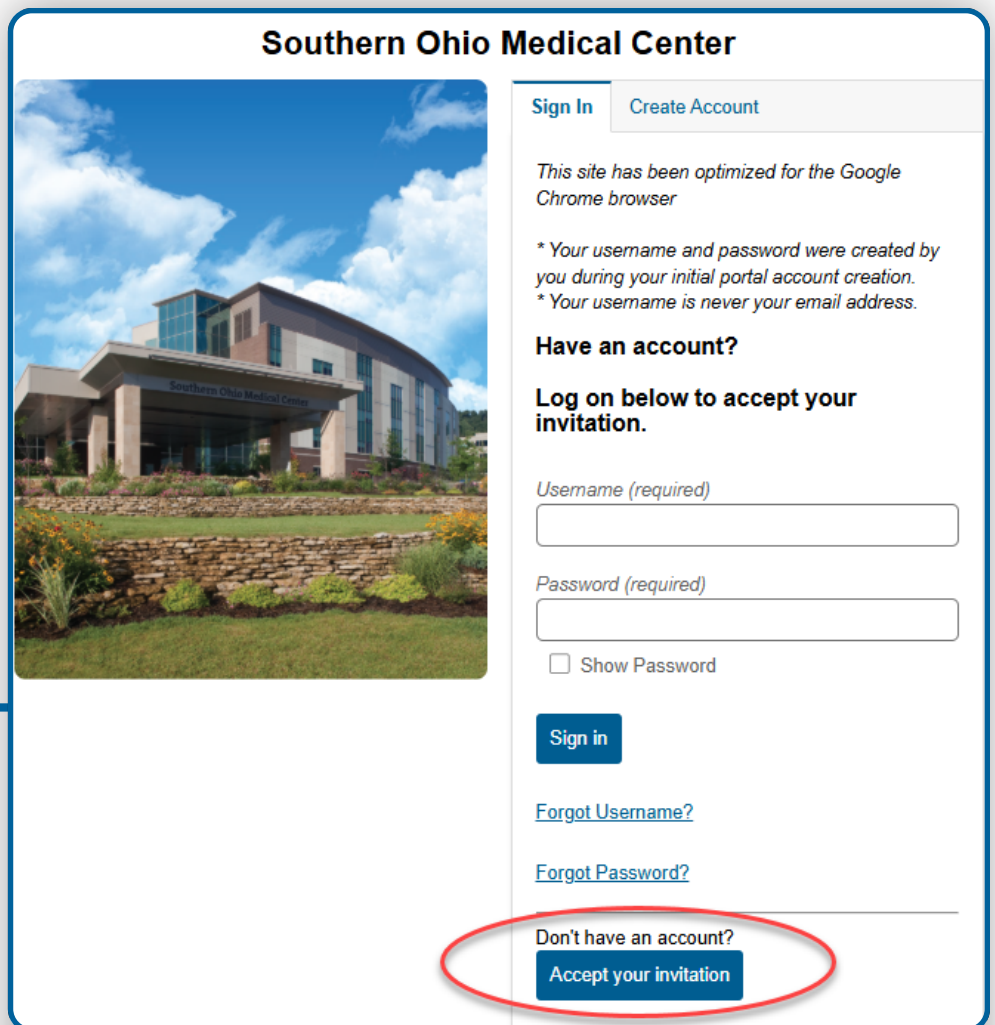
Access level
Standard

Access permissions
Clinical data, Family history, Download medical records, Non-clinical/social appointments, Profile

[Submit](#) [Cancel](#)



10. After clicking the link, they can either **log-in to accept**, if they already have a portal account, or create a new account to accept your invitation.



Southern Ohio Medical Center

[Sign In](#) [Create Account](#)

This site has been optimized for the Google Chrome browser

* Your username and password were created by you during your initial portal account creation.
* Your username is never your email address.

Have an account?

Log on below to accept your invitation.

Username (required)

Password (required)

Show Password

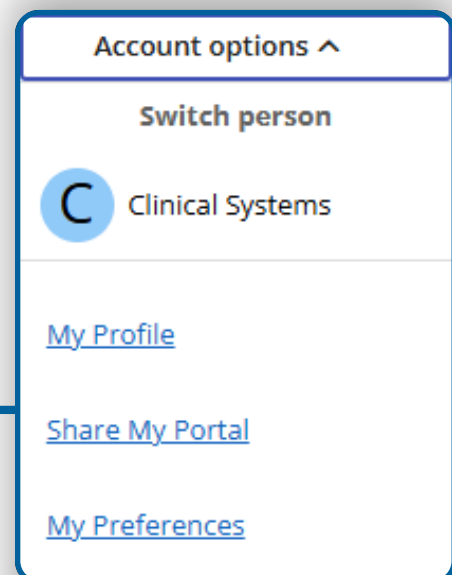
[Sign in](#)

[Forgot Username?](#)

[Forgot Password?](#)

[Don't have an account?](#)
[Accept your invitation](#)

11. Once a user has access to another patient's portal information, they can **select which account** they need to view by opening the **Account options** and selecting the shared account.



Account options ^

Switch person

C Clinical Systems

[My Profile](#)

[Share My Portal](#)

[My Preferences](#)