

## Patient MyChart Sign Up via Telephone

**Audience:** Ambulatory Support Staff  
**Application(s):** EpicCare Ambulatory

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**Version:** V2.0

### Background:

- We have identified **86,000 patients** who have had one or more visits at UMass in the last two years **and** who do not have an email on file.
- Given the impact of the coronavirus, it's more important than ever that we be able to provide patients with easy access to information, resources and tools.
  - We can do this most effectively through our myChart portal.
  - Our secure patient website lets patients send messages to their provider care team and access health information from every UMass Memorial Health Care location.
  - We will soon also be providing access to video visits, and this will work most effectively when patients are enrolled in myChart.
- You have been provided a list of patients who need to be called to see if we can enroll them in myChart. We currently do not have an email on file for them.

### IMPORTANT to Know

- If the patient does not answer the phone, do not leave a voicemail for them to call back
- Attempt to reach each patient 3 times (once a day over three days)

### SCRIPT

- Good morning/afternoon. I am calling from UMass Memorial Healthcare.
- I see that you are not yet signed up for myChart.
- Given the Coronavirus outbreak, we are encouraging all of our patients to sign up for our patient portal, myChart.
- Through myChart, you can communicate with your provider care team, access your health information, receive the latest Coronavirus updates, and learn about our responses to the Coronavirus.
- Soon you will be able to do video visits with your provider as well.
- May I please enroll you in myChart at this point?"

### If NO,

- Thank you for your time today. Please stay safe by:
  - Washing your hands frequently
  - Covering your cough
  - Social distancing
  - Thank you and have a good day!

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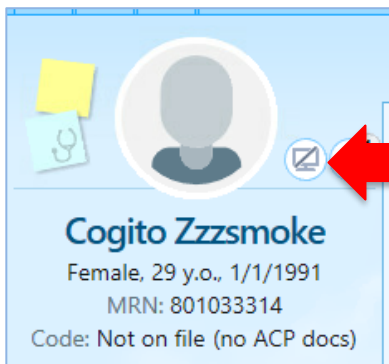
If YES,

- Ask the patient WHICH email address you can add to their UMass account
  - Enter email address
  - Read the email address back to the patient to prevent typos
- If the patient does NOT have an email account, they cannot sign-up for a myChart account. An email address is required. If they ask WHY they need an email address, tell them that when there are updates to their chart, like new results or a new message, they will receive a notification in their personal email telling them (with a direct link) to login in to myChart for the new information.
  - There are many free email address options; gmail.com, yahoo.com, etc
  - If the patient wants to create an email address, ask them to do so and negotiate a time for you to call them back.
  - Do not have patients calling us back.
- There are **two ways** to sign a patient up for myChart:
  - From a phone conversation, you can send an Activation email (steps below)
  - Self-Signup (steps below)

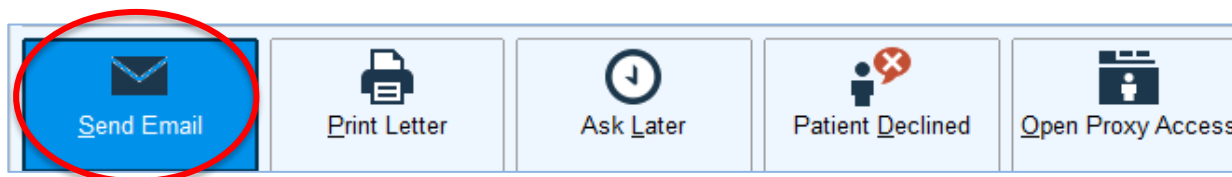
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To assist a patient with myChart signup **with the send of an Activation Email:**

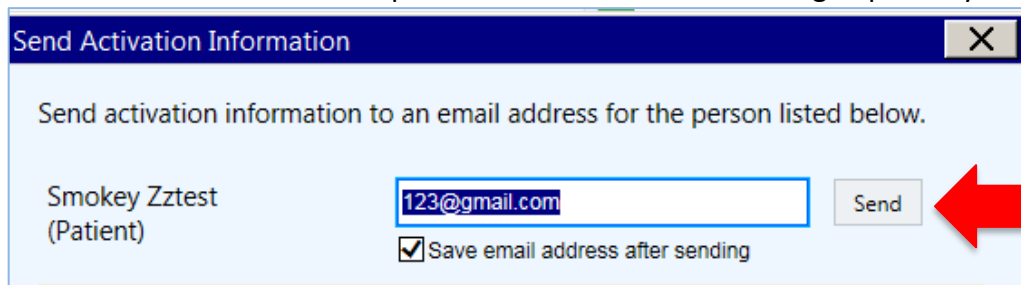
1. You have received confirmation that the patient wants to sign up for myChart and currently has an email that they will use, via the introduction scripting.
2. Log into the patient's chart in Epic via Patient Station, Appointment Desk or Patient Lookup.
3. Click on the myChart status field on the patient's banner.



4. Clicking on this field will display the **myChart Signup** popup with the **Send Email** notification highlighted, if the patient's myChart status is 'Inactive'.



5. Enter the patient provided email address and then read back to the patient to Confirm the email address. Then select SEND to send the patient the activation email to sign up for myChart.



6. Encourage the patient to respond to the email within 30 minutes, as the steps will be the simplest. They will need to:

- I. enter their desired user name (min 6 characters, case insensitive)
- II. enter their desired password (min 8 characters – upper and lower case with numbers and letters, case sensitive)
- III. enter the Date of Birth

The activation email is good for 14 days, but after the first 30 minutes, the patient will have to enter a few more fields.

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7. Inform the patient that they can respond to the email from their phone, from a laptop/pc – wherever they access their email from. IF THEY WILL BE USING FROM THEIR PHONE – instruct the patient to download the mobile application.
8. After setting up their account, the patient can then download the myChart application from iTunes or the Android Play Store and access the mobile application.
  - a) From the Play Store or iTunes, enter **MyChart** in the search field. Find and select the MyChart entry with the following icon.



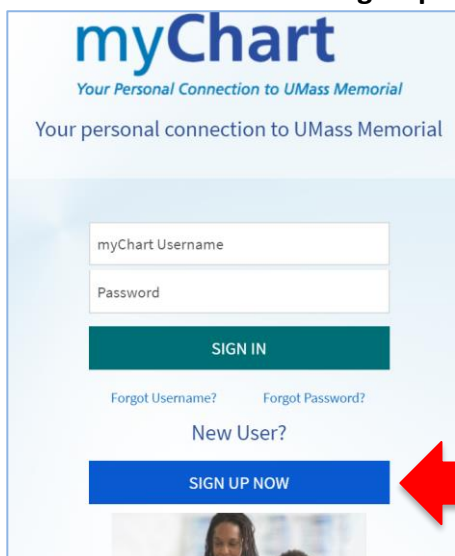
- b) Open the newly loaded MyChart application and read/accept the terms. When prompted to allow the application to access your location, select YES so that you can see all of the Epic healthcare organizations near you (or else you will have to search through all 50 states). Find and select the UMass Memorial Health Care logo.



- c) The patient is now ready to login and begin using your MyChart mobile application.

To provide information to a patient that would like to perform self-signup at a later time:

1. Have the patient do a Google search for **UMMHC MyChart**.
2. Click on the **myChart – Login Page – UMass Memorial** link.
3. Have them click the blue **Sign Up Now** button under **Sign In**.



## Patient MyChart Sign Up via Telephone

**IMPORTANT:** On the next screen, have them select the blue **SIGN UP ONLINE** button, NOT the main page, which will ask for an activation code.

All fields are required.

**myChart Activation Code**  
Enter your Activation Code as it appears on your After Visit Summary (AVS) from your last visit to UMass Memorial Health Care. You will receive an activation code via email or text message.

XXXXXX - XXXXXX - XXXXXX

**ZIP Code**  
Please enter your ZIP code.  
XXXXXX

**Date of Birth**  
Enter your date of birth in the format shown, using 4 digits for the year.  
mm / dd / yyyy

**NEXT**

No Activation Code?  
**SIGN UP ONLINE**

Do NOT fill out this section

CLICK this box

- To use the self-signup, the patient will have to go through a series of questions to confirm their identity (similar to if you apply for a loan on line). Once the patient passes the identification step, the information is then passed to UMMHC, where we attempt to match the record we have on file. If we can't match, these transactions go to a queue and are processed by a support person. If we can identify a match, we will send an activation code within 48 hrs.

**myChart**  
Your Personal Connection to UMass Memorial

UMMHC has security measures in place to protect the privacy of your information. We must verify your identity in order to grant you a myChart account. We can do so using the following methods:

**In person**, at your next visit  
By calling the **UMass Memorial Health Care myChart Patient Support Line** (open Monday through Friday, 7 am to 8 pm) at 855-UMASS-MD (855-862-7763). You will be asked questions to verify your identity.  
By using an **automated, online verification system** that is available 24/7. This system is hosted by a third-party credit agency that uses credit and other information to verify your identity.

**NOTE:** UMMHC does not have access to the information used by the third-party credit agency, called Experian Health, to verify your identity, nor does UMMHC provide any information to this vendor. Use of this system does not impact your credit score. If the online verification system is unable to verify your identity, it could be due to something as simple as a misspelling of a name or a different address on file. If this occurs, please call 855-UMASS-MD (855-862-7763).

\* Indicates a required field

**Name**

\* First name Middle name \* Last name

- DO NOT attempt to give them an activation code over the phone.
  - If they do not want to proceed with the self-signup SEND them an activation email.