

# Catholic Health MyChart Patient Quick Start Guide

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# Welcome to Catholic Health MyChart

Catholic Health MyChart provides you with online access to your medical record. It can help you participate in your healthcare and communicate with your providers.

With Catholic Health MyChart, you can:

- View all of your health information in one place. See your medications, test results, appointments, medical bills, estimates, and more all in one place, even if you've been seen at multiple healthcare organizations.
- Quickly schedule appointments and find care. Make appointments at your convenience, complete pre-visit tasks from home, and find the nearest urgent care or emergency room when you need it.
- Connect with a doctor no matter where you are. Send a message, get online diagnosis and treatment, talk face-to-face over video, or arrange to follow up in person, depending on the level of care you need.
- Take care of your children and other family members. Stay on top of everyone's appointments and check in on family members who need extra help, all from your account.

This guide provides an overview of many of Catholic Health MyChart's features and how to use them.

## Access Catholic Health MyChart

- On your computer, go to <https://mychart.chsli.org/>
- On your mobile device, download the Catholic Health app from the Apple App Store or Google Play Store.

## Sign up for a Catholic Health MyChart account

To sign up for Catholic Health MyChart, you must be **at least 12 years old**. There are several different methods of MyChart signup that might be used by different departments across the organization:

- Clinic staff might sign you up directly while you're at the front desk or in the exam room.
- You might receive a Catholic Health MyChart activation code on your After Visit Summary.
- You might receive a text or email with an activation code when you come in for a visit.
- You might be able to use self-signup online to create a Catholic Health MyChart account by matching your information against what is on file in your medical record.

## Request an activation code if you don't already have one

If you don't have an activation code, you can request one online. To request an activation code online:

1. On the Catholic Health MyChart login screen on the MyChart website or Catholic Health mobile app, click **Sign Up Now**.
2. Click **Sign Up Online**.
3. Click **Request an Activation Code** to supply personal verification items, such as the last four digits of your Social Security number and your date of birth, and have an activation code sent to your email address or mobile phone.

## Use your activation code to sign up

1. From the Catholic Health MyChart login screen on the MyChart website or Catholic Health mobile app, select **Sign Up Now**.
2. Enter your activation code and other personal verification items, such as the ZIP code and your date of birth. Select **Next**.
3. On the next page, choose the following:
  - **MyChart username**. Choose something that others wouldn't be likely to guess but is easy for you to remember. It cannot be changed at any time.
  - **Password**. Choose a unique combination of numbers, letters, and special characters, using both uppercase and lowercase letters. Your password must be different from your MyChart username and be at least 8 characters long. Choose a password that you don't use for other websites.
  - **Security question**. Choose a question you can use to verify your identity if you forget your MyChart password. The answer you enter cannot include your MyChart password.
4. On the next screen, choose whether you want to receive a notification message in your personal email or mobile phone when there is new information available in your MyChart account. If you opt to receive email alerts, enter your email address. If you opt to receive text message alerts, enter your mobile phone number.

## Log in to Catholic Health MyChart

1. In your web browser, enter <https://mychart.chsli.org/> and access the login page.
2. Enter your Catholic Health MyChart username and password, and click **Sign In**.

## Recover a lost username or password

If you're having trouble logging in, click the **Forgot Username?** or **Forgot Password?** link below the login fields for assistance. You will be prompted to answer some security questions to verify your identity so you can recover your username or password. If you fail to recover your password after 5 unsuccessful attempts, you will be directed to reset your password. If you have 5 unsuccessful attempts at resetting your password, your account will be locked and you'll need to contact Customer Service at 631-465-6100.

## Learn how to navigate Catholic Health MyChart

When you first log in to Catholic Health MyChart, you'll see the MyChart home page.

- At the top of the home page are shortcuts you can use to get to the most commonly used activities.



You can customize the shortcuts by selecting your account in the top right corner and then **Change Your Shortcuts**.

- Below the shortcuts is the health feed, which shows the most important alerts and information for you and any family member you care for, like a new message from your care team and reminders for an upcoming appointment.
- You can use the searchable menu to easily find any other activities you need to get to.

# Health

## View your test results

With Catholic Health MyChart, you can view test results as soon as they become available, rather than waiting for a phone call or letter from your physician. To view test results, go to **My Record > Test Results**. Select a test to see more information about it, such as:

- The standard range for the result
- Any additional comments your provider entered about the result



If you're looking for a specific result, enter key words in the search field on the Test Results page.

## Receive email or text messages when new results are available

1. Go to **Account Settings > Communication Preferences**.
2. Expand the Health section and select a notification option next to Test Result.
3. Update your email address and mobile phone number if needed at the bottom of the page.

## Manage your medications

### View your current medications

Go to **My Record > Medications** to see all of your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the physician who prescribed the medication. You can view additional information about a medication, such as precautions to consider when taking the medication and potential side effects, by clicking the **Learn more** link.



- Remove a medication you're no longer taking by clicking **Remove** and then adding comments about why you're no longer taking that medication.
- Add a new medication by clicking **Report a Medication** and then adding comments about why you're taking the new medication.

Your chart will be updated after your healthcare provider reviews the change with you at your next visit.

## Request a medication refill

1. From the medication list, click **Request Refills**.
2. Select the check box next to the medication you need refilled and enter any comments. Click **Next**.
3. Select a delivery method, pharmacy, and pickup date and time that's convenient for you, if applicable. Click **Next**.
4. Review the details of your refill request and click **Submit**.

You will receive a message in your MyChart Inbox when your prescription refill is processed.



You can request refills only for prescriptions that were filled at a pharmacy within your healthcare organization. If you need a medication refill for a prescription at an external pharmacy (for example, Walgreens or CVS), you'll have to contact that pharmacy to request a refill.

## View a summary of your health information

To get a summary of your medical record, go to **My Record > Health Summary**. This summary includes:

- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care

## Track your COVID-19 testing and vaccination status

The COVID-19 activity pulls together helpful information and resources for you, including:

- Your COVID-19 testing status and recent results.
- Your COVID-19 vaccination status and details about the vaccine you received.
- Links to educational resources provided by the Centers for Disease Control and Prevention (CDC).

You can access the activity from the COVID-19 health feed card or by going to **My Record > COVID-19**.

## Get updates about your pregnancy

If you're pregnant and have an estimated due date recorded in your chart, you'll see a card in your health feed that asks whether you want to receive updates about your pregnancy. If you opt in, you'll see a new health feed card that tracks your baby's size and pregnancy progress week by week. These pregnancy updates are also shared with family members or caregivers who have access to your record so that everyone can stay in the loop. If you change your mind, you can stop receiving the updates at any time.

# Messaging

## View messages from your provider

You can read any messages sent by your doctor or other providers by going to your Message Center (**Communication > Messages**). The Message Center includes four folders:

- The **Conversations** folder is the primary folder and includes messages between you and your care team or other clinic staff. The list of messages in this folder is organized by conversation to keep messages and replies together.



To flag a conversation for easy access in the future, open the conversation and bookmark it. The conversation then appears in the **Bookmarked** folder.

- The **Appointment** folder includes appointment reminders and confirmations.
- The **Automated Messages** folder includes system messages automatically sent to and from your account, like payment confirmations and questionnaire submissions.
- The **Trash** folder includes any conversations you've deleted from your main folders. If you realize you need a message again, you can restore it to its original folder.



If you're looking for messages about a specific topic in a particular folder, you can enter key words in the **Search** field to find them.

## Receive email or text messages when new MyChart messages are available

1. Go to **Account Settings > Communication Preferences**.
2. Expand the Messages section and select a notification option.
3. Update your email address and mobile phone number if needed at the bottom of the page.

## Ask your doctor for medical advice

If you have a non-urgent medical question, you can send a message to care team. This message is secure, meaning your information stays private as it is sent over the Internet.

You might send a message if you're not sure whether you should come in for an appointment, if you need clarification on the dosage of one of your medications or something that was discussed in a recent visit, or if you just want advice about a common illness.

1. Go to **Communication > Ask a Question**.
2. Select **Medical Question**.
3. Select a recipient from the list. This list might include your primary care provider, another doctor with whom you've recently had an office visit, or the general nursing staff at the clinic.
4. Select a subject for your message and enter your question.
5. When you are finished, click **Send**.

If you've opted to receive notification for new messages in your MyChart account, you'll receive an email, text message, or push notification letting you know that the clinic has responded to your request.



To view a message after you've sent it, go to **Communication > Messages** and find your message in the **Conversations** folder.

# Visits

## View your past or upcoming appointments

You can view your past or future appointments by going to **My Record > Visits**.

Select a scheduled future appointment or click **Details** to see info such as:

- The date, time, and location of the visit
- Any pre-visit instructions from the clinic
- Directions to your clinic

If an upcoming appointment is eligible for eCheck-in, you can use it to take care of tasks such as the following before you arrive at the clinic:

- Pay visit copays
- Pay balance payments
- Verify or update demographics information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires
- Update PCP
- Update insurance
- Electronically sign forms
- Get a QR code for use at the kiosk

For past appointments, you can click **View After Visit Summary**<sup>®</sup> to see a summary of the care you received during your visit. You can also view any of your doctor's visit notes that are shared with you by clicking **View notes**.

## Schedule or request an appointment

To schedule or request an appointment, go to **Find Care > Schedule an Appointment**. Depending on the reason for scheduling or type of appointment you choose, you'll be directed to the Schedule an Appointment or Request an Appointment page.

- When you schedule an appointment, you make the appointment yourself and don't need to wait to hear back from the clinic. After verifying your demographics and insurance information, you can choose a location and enter preferred dates and times. Pick an appointment from the list of available time slots to schedule it.
  - Your provider may have placed an order for an appointment that you need to schedule. You will see the order on the Schedule an Appointment page. Click the **Schedule now** button to schedule an appointment
- When you send an appointment request, you're asked to enter the provider you want to see, the reason for the visit, preferred dates and times, and any comments regarding why you are requesting the appointment. After you submit your request, someone from the clinic will contact you to verify an appointment date and time.



If you don't find the appointment date or time you want when you schedule an appointment, you can add yourself to the wait list to receive notification if earlier appointment times become available. Wait list options are available during scheduling and after you've scheduled when you click **Details** for an upcoming appointment from the Visits list.

You can also favorite an appointment to make it easy to schedule the same type of visit again later with the same provider and department.

## Cancel an appointment

Depending on the date and time of your next appointment, you can cancel it through MyChart.

1. Go to **My Record > Visits**, and select the appointment from the list or click **Details**.
2. Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.

## Have a video visit with your doctor

Meeting with a provider by video visit is a convenient way to receive care without coming to the hospital or clinic in person.

You can use a web browser on your desktop computer or a mobile application to start a video visit. Mobile devices are preferred because most already have the appropriate camera and microphone setup for video visits.



If your provider is on a mobile device, they can't access other activities while they're connected to the video because mobile devices won't run the camera in the background. If a provider navigates to a different activity, for example to document information about your visit, the video visit is paused and you see the provider's initials in a circle instead of a video image until the provider returns to the video visit activity.

## Prepare for your video visit

To ensure a smooth connection, complete the following tasks well in advance of your video visit:

- If you'll join the video visit on your mobile device, make sure the camera app is up-to-date.
- If you'll join the video visit on your desktop computer:
  - Make sure you have a webcam set up. This can be a webcam that's part of a laptop or a separate USB webcam.
  - Make sure you've installed any required browser plug-ins, software, or apps with the most recent updates.

After you've done these things, you can test that everything is working in MyChart. You should complete this test at least 30 minutes prior to your video visit start time.

Sometimes you may be contacted by your provider's office before your telehealth visit to determine how you would like to receive the video link.

The link will be sent by email or text message. Click the link in the message to join the visit. Your provider will join the call shortly.

### Schedule a future video visit

1. Go to **Find Care > Schedule an Appointment**.
2. Select TeleHealth Follow Up Visit as your reason for visit.
3. Choose which provider and time slot you want and then select **Schedule**.
4. At least fifteen minutes prior to your video visit appointment, log in to MyChart and go to the visits list (**My Record > Visits**).
5. Select **eCheck-In** to complete the necessary steps prior to beginning your visit.
6. After you've completed eCheck-In, select **Begin Visit** to ensure you're able to connect.
7. If the connection was successful, you'll be placed in a virtual waiting room. Your provider will be with you shortly!

# Family Access

If you have access to your family members' medical records, you can view most of the information in their records in the same way that you view your own. Some things that might be particularly useful include:

- Viewing or printing your child's immunization record
- Viewing your child's growth charts
- Viewing a family member's test results

If you're a parent, you can have full access to your child's record through age 11 and limited access through age 18. This section explains how to access a family member's record and how to access growth charts and immunizations in a child's record.

## Access a family member's record

After you've received permission, new or timely information for your family member appears alongside your info in your health feed on the Catholic Health MyChart home page. You can view other information in your family member's record by switching to their chart. From the **Switch** menu, select your family member's name.



You can customize how the names and photos appear for each family member. For more information, refer to [Personalize Catholic Health MyChart](#).

## Invite someone else to access your record

1. Go to **Sharing > Share My Record** and select **Friends and family access**.
2. On the Friends and Family Access page, click **Invite Someone** under the Who Can See My Record? section.
3. Enter that person's name and email address, confirms the level of access, and click **Send Invite**. The invitation then appears as Pending at the top of the page.
  - After you send the invitation, the recipient receives an email to notify them that you've invited them to have access to your account. From this email, they can click a link that takes them to a page where they must enter your date of birth to confirm that they know you and accept the invitation.
4. After the person you've invited accepts the invitation, you'll receive a tickler message to let you know, and the Pending label is removed next to that person's name on the Friends and Family Access page. You can return to this page at any time to edit or revoke that person's access.

## View and print your child's immunization record

When you are in your child's record in MyChart, go to **My Record > Health Summary** and select the Immunizations tab. You can see the immunizations your child has received and the dates on which she received them. Click the immunization name to learn more.

To open a printer-friendly summary of your child's immunizations, click .

## View your child's growth charts

To view your child's growth charts, open your child's record and go to **My Record > Growth Charts**.

You can customize the view of the growth chart by:

- Choosing a different Chart Set. For example, you can switch between growth charts provided by the Center for Disease Control (CDC) and the World Health Organization (WHO).
- Changing the Chart Type. For example, you can switch the view from length-for-age to weight-for-age or Body Mass Index-for-age.

You can also view the growth chart with a different unit of measure (metric or standard) by selecting the option for that unit of measure.

If you want a copy of the growth chart for your records, click .

# Medical Record Access and Sharing

Catholic Health offers several different features through the MyChart patient portal to allow you to access your health records and share them with other people.

## View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.

1. Go to **Sharing > Share My Record** and select **Download or send your record**.
2. Select a visit on the **Single Visit** tab or use the **Date Range** tab or **All Visits** tab to select multiple visits. Then:
  - Click **View** to view a copy of the visit summary.
  - Click **Download** to save a copy of the visit summary for your records.
  - Click **Send** to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.

## Share your medical information with someone else

Share Everywhere is a way for you to share your medical information with the people who are taking care of you. Using your MyChart or MyChart mobile account, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a note back to your health system to help keep your care team informed of the care they provided.

1. Go to **Sharing > Share Everywhere**.
2. Enter the name of the person who will be viewing your record and request the share code.
3. Tell that person to go to [www.shareeverywhere.com](http://www.shareeverywhere.com) to enter the code along with your date of birth.

## See your medical information from other healthcare organizations

If you've been seen at another healthcare organization, you might be able to view information from that medical record right in MyChart. You might have heard this feature referred to as Happy Together. The information you might see from other organizations includes:

- Allergies
- Care team
- Health issues
- Medications
- Messages

- Test results
- Visits

To view this information, you must link your account. Go to **Sharing > Link My Accounts** to get started. Then, select your account from the list or search for it and click **Link Account**.

After you've linked your accounts, information from the other organization appears in MyChart with a  icon.



For more information about how linked accounts work and what information you can see from each healthcare organization, click the **See our FAQ page** link.

# Billing and Insurance

## View your outstanding balance

To see the outstanding account balance for any of your accounts, go to **Billing > Billing Summary**. To view additional information about an account, including past statements, click the **View balance details** link.



If you have a question about your balance or other information for a billing account, you can use the **Contact customer service** link to send a message.

## Make a payment for an outstanding account balance

1. Go to **Billing > Billing Summary**.
2. Click **Pay Now** for the account on which you want to make a payment.
3. Enter the amount to pay along with your credit card or bank account information. Click **Continue**.
4. Review your payment information and click **Submit Payment**.



If you can't pay your entire balance all at once, you can set up a payment plan to pay a smaller amount each month.

## Sign up for paperless billing

1. From the Billing Summary page, click the paperless billing alert.
2. If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number and select the corresponding check box to receive notifications.
3. Select the **I understand that I will no longer receive statements in the mail** check box and click **Sign Me Up**.

## View a price estimate for medical care

To help you plan for upcoming care, such as a surgery or other procedure, you can view an estimate from MyChart. The estimate is based on your insurance and what other patients have been charged in the past.

1. Go to **Billing > Estimates** and click **Estimates**.
2. View any Estimates that have been created for you.

## Request assistance with your medical bills

If you need help paying your medical bills, you can submit a financial assistance application to see if any resources are available to you. Go to **Billing > Apply for Financial Assistance Online** to get started. You'll need to provide the following information to complete the application:

- How many people live in your household

- How much you receive from all sources of income
- Your household expenses (such as mortgage, rent, and auto loan)
- Your assets (such as your bank account and vehicle)
- Supporting documents to verify the information you provide

After you submit your application, a financial counselor will contact you to follow up.

You can also access forms from the **Financial Assistance Policy & Forms** menu option.

## View claims for services covered by insurance

1. Go to **Insurance > Claims**.
2. Select a claim to view details for it, such as the servicing provider and claim status.

If you have questions regarding the claim, click **Customer Service Request** to send a message to customer service staff.

## Review and update your insurance information

To review the insurance information your clinic has on file, go to Insurance > Insurance Summary. Click View coverage details for the payer or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.

To update your insurance information, make any of the following changes:

- Request a change to an existing coverage
- Remove a coverage
- Add a new coverage. New coverages are submitted for verification when you log out of MyChart

# Preferences and Administrative Features

## Personalize Catholic Health MyChart

There are two ways you can personalize how Catholic Health MyChart appears for you and each of your family members. For each account you have access to, you can:

- Specify the color scheme.
  - Change the name that appears under that person's photo.
1. Go to **Account Settings > Personalize**.
  2. Click **Edit**.
  3. Make either of the changes described above and then click **Save**.

## Update your personal information

You can update your address, phone number, email address, and other personal details at any time so that your clinic always has the most up-to-date information in your record.

1. Go to **Account Settings > Personal Information**.
2. Click **Edit** in the section for the information you need to update.
3. Confirm that your updated information is correct, and then click **Save Changes**.

## Customize your notification preferences

Catholic Health MyChart can send you notification by email or text message when there is new information available in your MyChart account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

1. Go to **Account Settings > Communication Preferences**.
2. Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive and click **Save Changes**.
3. Update your email address and mobile phone number if needed.

## Change your Catholic Health MyChart password

To ensure that your medical information stays protected, consider changing your MyChart password periodically. To do so, go to **Account Settings > Security Settings**.

# Protect your account with two-step verification

You can ensure that your account stays secure even if someone else has your username or password by turning on two-step verification. When this feature is turned on, you must enter a code that is sent to you by email or text message to log in to Catholic Health MyChart, in addition to using your username and password.

When you log in to MyChart for the first time, you might be prompted to verify your email address and phone number to enable two-step verification. If you decide to turn off two-step verification instead, you can turn it on again later.

1. Go to **Account Settings > Security Settings** and click **Turn on Two-Step Verification**.
2. Confirm your email address or phone number, enter your MyChart password, and then click **Continue**.
3. Select whether you want to receive the security code to turn on two-step verification by email or text message.

# Mobile Apps

The Catholic Health app for iOS and Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the Catholic Health MyChart website, allowing you to do all of the following, and more!

- View test results
- Send and receive messages
- Schedule and confirm upcoming appointments and view visit summaries for past appointments
- View your health summary, including allergies, immunizations, current health issues, and medications
- View preventive care procedures and when they are due
- Request medication refills
- View billing statements and pay balances due and visit copays
- Access family members' charts

If you have an iOS device, you can pair it with Apple Watch™. With MyChart for Apple Watch, you can:

- See alerts for new information in Catholic Health MyChart
- View upcoming appointments
- Read messages
- Review your medication list

## Download the Catholic Health MyChart app

To install the Catholic Health MyChart app, go to the App Store or Google Play Store and search for "Catholic Health."

1. On your mobile device, open the Apple App Store (if you have an iOS device) or the Google Play Store (if you have an Android device). Look for one of the following icons to find the app store on your device:



2. Search for **Catholic Health**. [Look for the following icon:](#)



3. Tap **Install**.
4. After you've installed the app, tap **Open** or find the Catholic Health icon on your device and tap to open it.

# Connect your Catholic Health MyChart account to Apple Health or Google Fit

If your doctor has assigned you a patient-entered flowsheet for tracking your health data, you can connect Catholic Health MyChart to Apple Health or Google Fit to automatically pull in data from other health and fitness apps or devices.

1. In the Catholic Health MyChart mobile app, open the Track My Health activity.
2. Tap **Connect to Health** or **Connect to Google Fit** at the bottom of the screen.
3. Choose the data you want to share with Catholic Health MyChart by tapping the toggle button for each type of data.
4. Tap **Done**. At this point, recent data that was already stored in Health or Google Fit is automatically synced to Catholic Health MyChart.