



Checklist for “Setting Up Your Patient Portal”

1) PDF documents required for your Patient Portal Pre “Go Live”:

Please provide a PDF copy of the following documents, to be included on your Patient Portal.

- i) Consent Form
- ii) Terms of Use
- iii) Privacy Policy

2) General settings to configure for your Patient Portal Pre “Go Live”:

Domain Name (e.g. www.healthcentre.chsinc.ca)		
Clinic Name		
Your Patient Portal Support Phone Number		
Your Patient Portal Support Email Address		Note: These settings are pre-configured for Courtesy Email
Support Email SMTP server		
Support Email SMTP port		
Username		
Password		
Your Patient Portal Feedback Email Address		
Minimum age of patients who can access the Patient Portal		
# of Days in Advance an Appointment can be confirmed	14	
Allow only rostered patients to view test results	N	
Allow patients to enter vitals at home	Y	
Allow only rostered patients to enter vitals at home	N	
Minimum timeframe to cancel/reschedule an appointment in hours	24	

3) Enable Patient Portal Booking

Please identify the necessary schedules and their associated appointment types you wish to have enabled for Patient Portal booking. These appointments will be made available to patients who have been seen by the Provider associated to the Schedule within the last year. Patients rostered to the Provider will also be able to book an appointment that has been enabled for web booking.

[illegible]

4) Web Clinics

Please identify any programs or clinics you wish to configure, and the schedules to be associated to these programs. Web clinics are not restricted to patients who are rostered to the associated Providers or those seen by the Provider within the last year.

[illegible]