

# PATIENT PORTAL GUIDE

REGISTER ONLINE, REQUEST  
APPOINTMENTS, AND  
MESSAGE YOUR CLINIC  
DIRECTLY.

# 01



## CREATING AN ACCOUNT

### YOUR KEYS TO THE CLINIC

*Creating a Patient Portal account is an optional step to allow you direct contact with your Physical Therapy clinic. All patient portal records are securely stored on our HIPAA-compliant, Cloud-based server.*

To create an account, you must use a valid email address and password to register.

Passwords must be at least 6 characters long and will need to be entered in twice to confirm the password.

A confirmation link will be sent to the email that was used to register the account. Once you have created an account, you will then need to update your account information.

If you have already registered, but forgotten your account, click the link that says "Forgot your password" to send a reset link to the registered account's email. This reset link will only last for 24 hours and will need to be sent again if the time limit has expired.

Located above the Password button in the Log In tab is the "Register as a new User" link that will send you into the Clinic Registration page.

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## PATIENT ACCOUNT INFORMATION

To update Account Information, you must first be logged into the Portal.

All items marked with the red star must be filled out correctly; any other item not marked is optional.

## EXTRA FIELDS

If your PT is surgical related or the patient is a minor, additional information must be added (surgery date or legal guardian name, respectively).

This can be done by clicking the check boxes that say "Is PT surgical related?" or "Is the patient a minor?"

## DATE FORMATTING

All dates must be formatted as mm/dd/yyyy; if the date is a single digit it must be written as 01 rather than 1.

SSN, if added, must be formatted as xxx-xx-xxxx.

## APPOINTMENT REMINDERS

Appointment Reminders can be set to five different categories: No Reminder, Home Phone, Cell Phone, Text, or Email.

Your PT Clinic will notify you of upcoming appointments based upon this selection.

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## PATIENT ACCOUNT INFORMATION

### PHONE NUMBERS

Your Primary Phone category (Work, Home, or Cell) is required; after this selection is made, enter the corresponding number in the correct text box.

Additional phone numbers can be added, but the primary number will be called first by your clinic.

Formatting of the number must be (xxx) xxx-xxxx.

### INSURANCE INFORMATION

When entering Insurance Information, the user can check "Do you have secondary insurance" or "Enrolled in Work Comp MPN" if those checks apply to them; this will then need the user to add in additional information.

### CHANGES IN INFORMATION

Any and all information that is added inside Patient Details can be edited even after clicking the Save button.

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## REQUESTING AN APPOINTMENT

To request an appointment, you must log into your account and have already updated their account information.

### MANDATORY FIELDS

The Appointment Request page asks for multiple items that are mandatory; these items have a red asterisk on them.

All of this information should also match with what is currently on the Patient Details page. Examples of these text boxes include: name, phone number, and email.

If a new phone is going to be added, the format should be area code first and then phone number.

### DATE FORMATTING

The request page includes a date selection. You are able to request your top three date preferences.

Only the first preference is required; entering additional options is highly recommended.

Dates must be formatted as mm/dd/yyyy; if the date is in the single digits, it must be written as 01 rather than 1.

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## REQUESTING AN APPOINTMENT

### TYPE OF SERVICE

Types of Service should mention what the patient wants to schedule an appointment for. It is recommended that this entry be short and concise; anything that needs to be explained should be entered into the Notes/Questions box.

The Notes/Questions box should contain any questions that the front office should know about before scheduling the appointment.

### SUBMITTING YOUR REQUEST

Once you have entered the required fields and any other necessary information, click the **save** button and the request will be instantly to your clinic.

After a request is sent to the clinic, no edits can be made. A confirmation email or phone call will come from your clinic directly.

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## SUPPORT

### QUESTIONS OR CONCERNS?

For any questions or concerns with the Patient Portal functionality, please email [support@getcavu.com](mailto:support@getcavu.com).

For Clinic-related questions, please reach out to your clinic directly at the contact information on the Patient Portal Contact page.

