



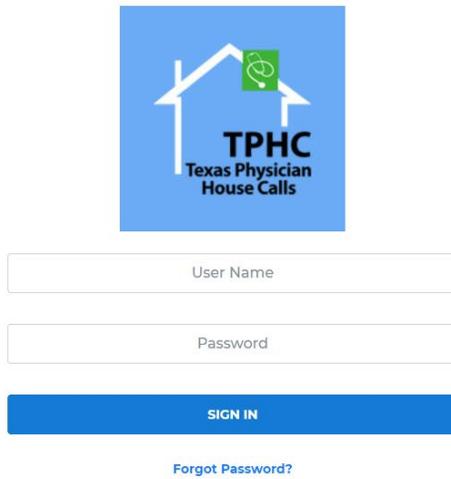
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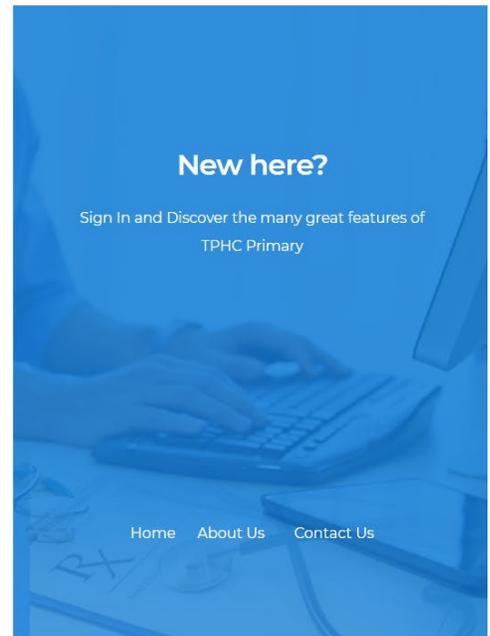


### Welcome to Agency Portal

1. Enter the URL <https://agency.texashousecalls.com/> in browser
2. User is redirected to the agency's portal
3. Enter Username and Password shared via email by practice
4. Click "SIGN IN" button

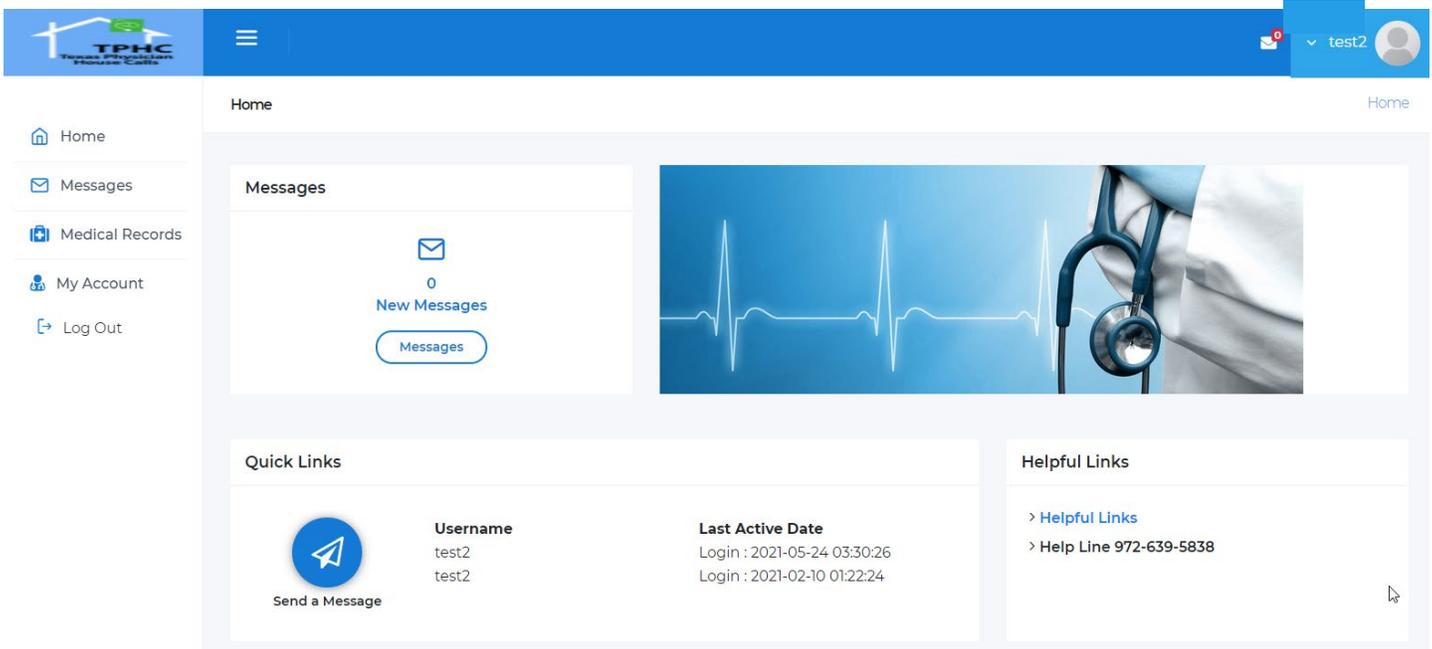


The login form features the TPHC logo at the top. Below it are two input fields: "User Name" and "Password". A blue "SIGN IN" button is positioned below the password field. A link for "Forgot Password?" is located at the bottom of the form.



[Note: The Password should contain at least one uppercase letter, one lowercase letter & one special character]

5. The User is redirected to the Agency Portal Home Page



The home page features a blue header with the TPHC logo, a menu icon, a notification bell, and a user profile for "test2". A left sidebar contains navigation links: Home, Messages, Medical Records, My Account, and Log Out. The main content area includes a "Messages" section with "0 New Messages" and a "Messages" button. A large banner image shows a stethoscope and an ECG line. Below this are "Quick Links" and "Helpful Links" sections. The "Quick Links" section displays a "Send a Message" button and a table of user activity.

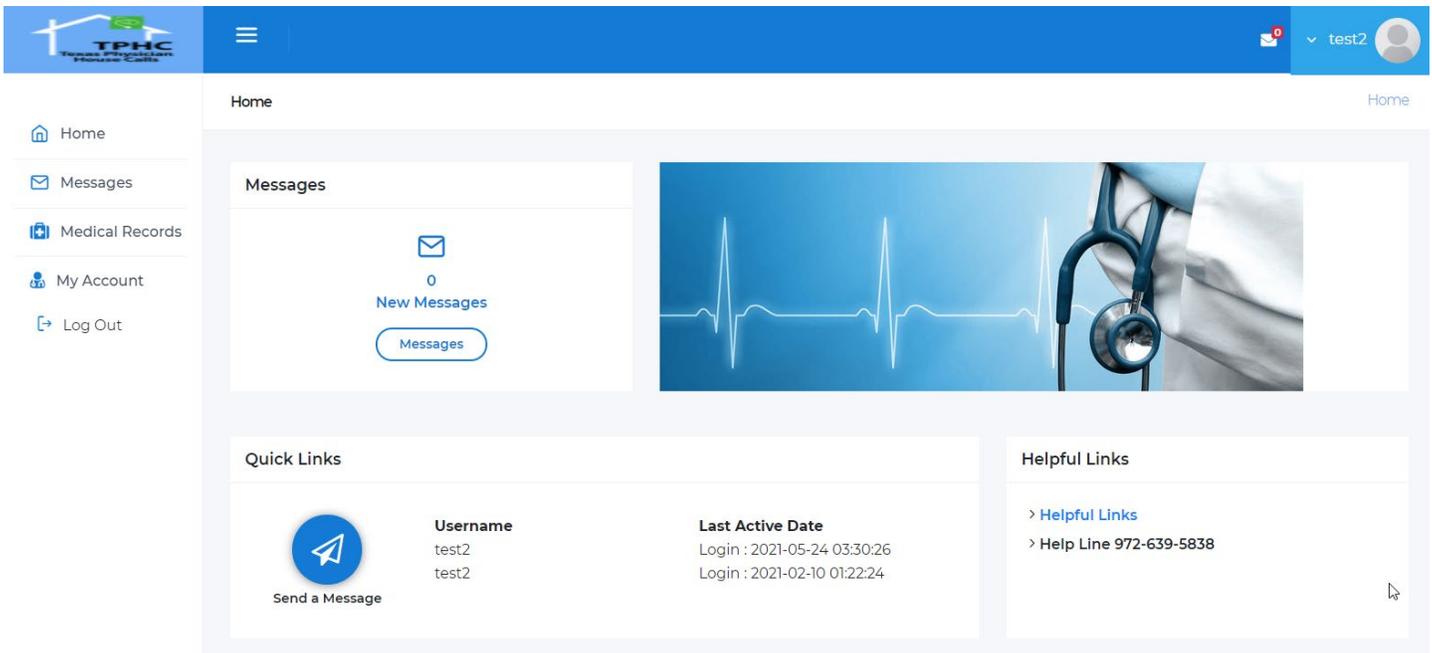
Username	Last Active Date
test2	Login : 2021-05-24 03:30:26
test2	Login : 2021-02-10 01:22:24

The following Menu options are listed in the Agency Portal:

- Home
- Messages
- Medical Records
- My Account
- Logout

## Home

- Click Home menu
- User Home page is displayed
- The Menu options of the Agency Portal are listed in the Home Page



Username	Last Active Date
test2	Login : 2021-05-24 03:30:26
test2	Login : 2021-02-10 01:22:24

## Messages

- **Usage:** User can send/reply a message by choosing the message type & respective
  - patient Message type: It shows the subject line of the message
  - Respective Patient: Mapped patient of the agency



### Steps

- Click the Messages menu
- User is redirected to the following page
- The following Menu options are available in the Messages page:
  - Inbox
  - Sent
  - Messages
  - New Message

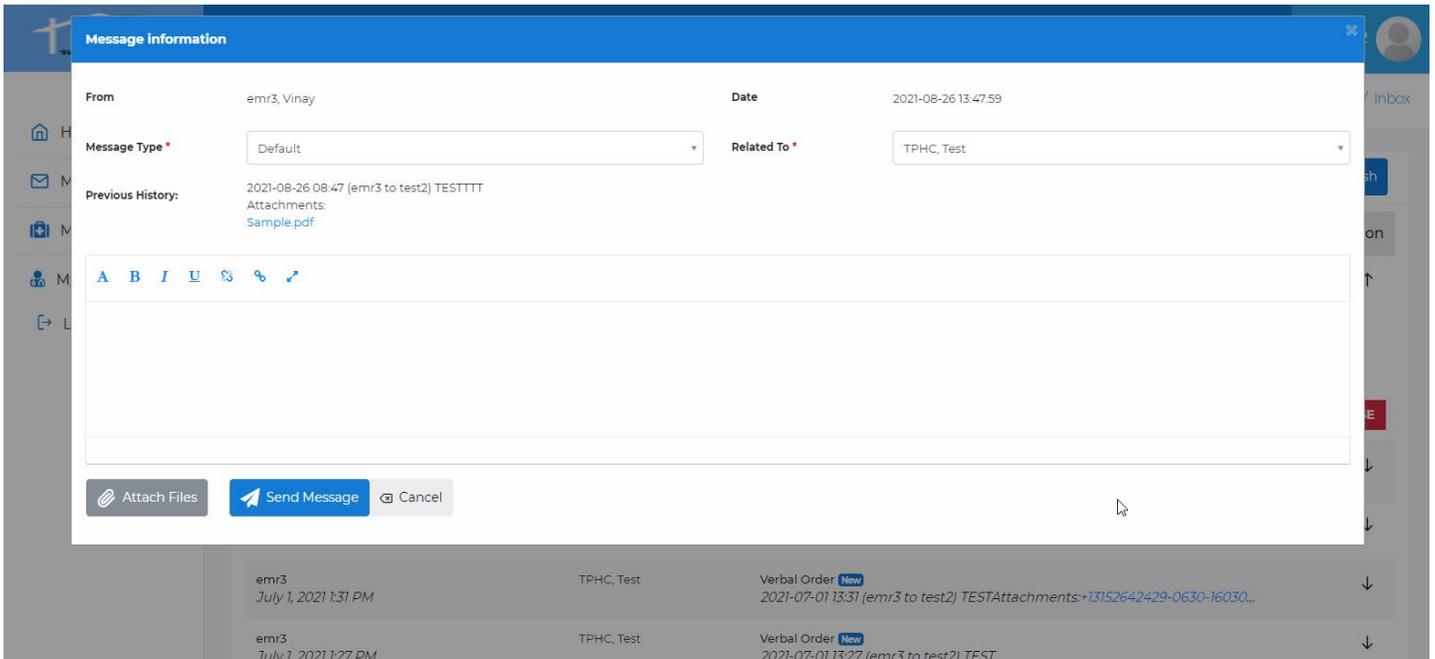
### Inbox

- Click Inbox menu to view received messages.

The screenshot shows the Agency Portal interface. At the top, there is a blue header with the TPHC logo on the left, a menu icon, and a user profile 'test2' on the right. Below the header is a navigation sidebar with options: Home, Messages, Medical Records, My Account, and Log Out. The main content area is titled 'Messages' and shows a breadcrumb trail 'Home / Messages / Inbox'. The inbox is displayed as a table with columns: From, Related To, Message, and Action. The first message is selected and expanded, showing details like 'From: emr3, August 26, 2021 8:47 AM', 'Related To: TPHC, Test', and 'Message: Default New 2021-08-26 08:47 (emr3 to test2) TESTTTT Attachments: Sample.pdf'. Action buttons for 'REPLY' and 'CLOSE' are visible. Other messages in the list include a forwarded message from emr1 and two verbal orders from emr3.

From	Related To	Message	Action
emr3 August 26, 2021 8:47 AM	TPHC, Test	Default <b>New</b> 2021-08-26 08:47 (emr3 to test2) TESTTTT Attachments: <a href="#">Sample.pdf</a>	↑
emr1 August 17, 2021 9:36 AM	TPHC, Test	485 <b>Forwarded</b> 2021-08-17 09:36 (emr1 to test2) please reviewemr1Attachments:New Text D...	↓
emr3 July 1, 2021 6:41 PM	TPHC, Test	Default <b>New</b> 2021-07-01 13:41 (emr3 to test2) TEST TPHC MRAttachments:Test_TPHC_40...	↓
emr3 July 1, 2021 1:31 PM	TPHC, Test	Verbal Order <b>New</b> 2021-07-01 13:31 (emr3 to test2) TESTAttachments:+13152642429-0630-16030...	↓
emr3 July 1, 2021 1:27 PM	TPHC, Test	Verbal Order <b>New</b> 2021-07-01 13:27 (emr3 to test2) TEST	↓

- Click REPLY button to reply to received
- messages the following screen is displayed



The screenshot shows a 'Message Information' form with the following fields and options:

- From:** emr3, Vinay
- Date:** 2021-08-26 13:47:59
- Message Type:** Default (dropdown menu)
- Related To:** TPHC, Test (dropdown menu)
- Previous History:** 2021-08-26 08:47 (emr3 to test2) TESTTTT  
Attachments: Sample.pdf
- Text Area:** A rich text editor with formatting options (A, B, I, U, S, link, unlink).
- Buttons:** Attach Files, Send Message, Cancel

Below the form, a list of messages is visible:

From	To	Subject	Date
emr3	TPHC, Test	Verbal Order <span>Now</span>	2021-07-01 13:31 (emr3 to test2) TESTAttachments:+13152642429-0630-16030...
emr3	TPHC, Test	Verbal Order <span>Now</span>	2021-07-01 13:27 (emr3 to test2) TEST

- User can view the previous message transaction history and attached files
- User can change Message Type and sender name by selecting Related
- To field Enter the Content and Attach Files
- Click Send Message button to send a
- message Click Cancel button to withdraw

### Sent messages

- Click Sent Messages to view sent messages
- Click Print icon to print the Sent Messages



## New Message

- Click New Message to compose a message and send to practice users.

Messages Home / Messages / New Message

Inbox 0 Sent Messages New Message

Compose a New Message

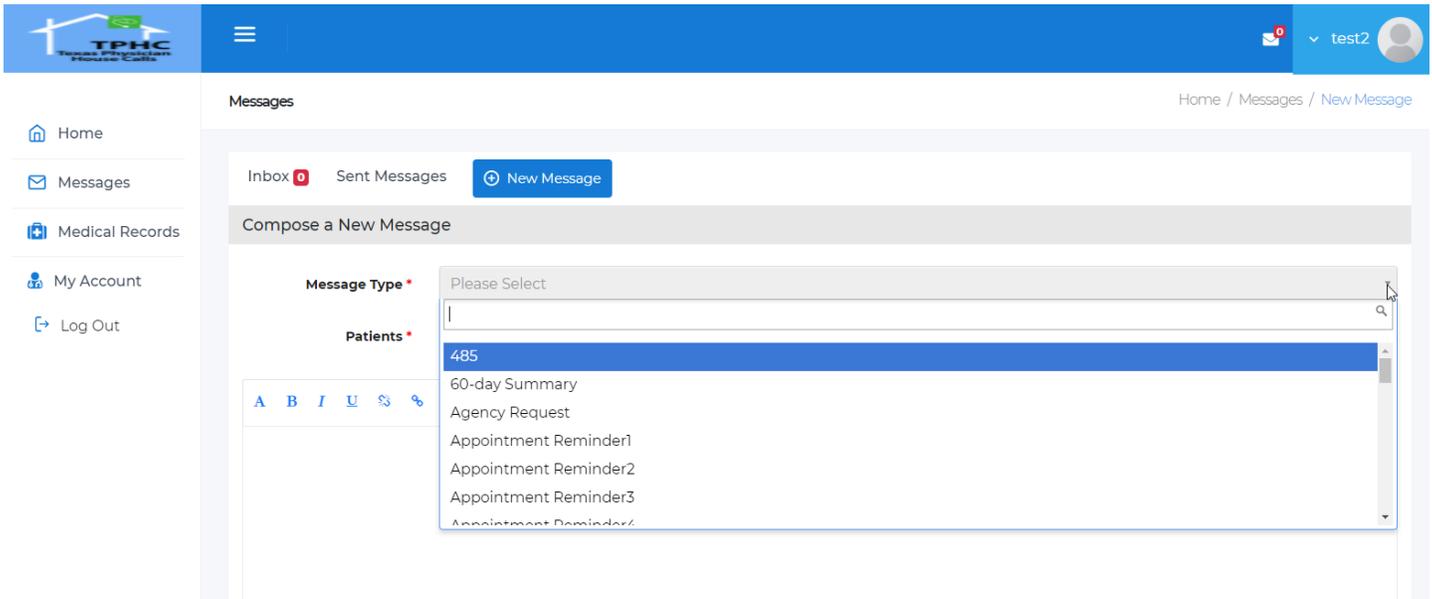
**Message Type \***

**Patients \***

**A B I U S 🔗 🔗**

## Message Type

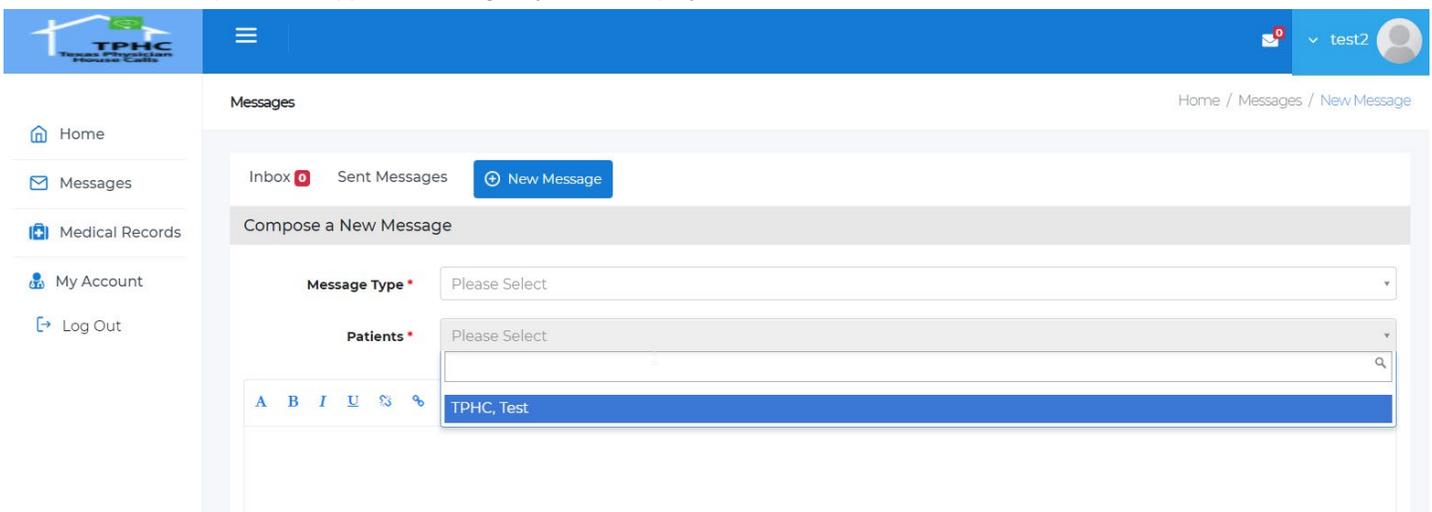
- Select Message Type Dropdown menu
- List of options are available, select the required options



The screenshot shows the 'Compose a New Message' interface. The 'Message Type' dropdown is open, displaying a search bar and a list of message types. The first option, '485', is highlighted in blue. Other visible options include '60-day Summary', 'Agency Request', 'Appointment Reminder1', 'Appointment Reminder2', 'Appointment Reminder3', and 'Appointment Reminder4'.

## Patients

- Select Patient Dropdown menu
- List of all patients mapped to that Agency will be displayed



The screenshot shows the 'Compose a New Message' interface. The 'Patients' dropdown is open, displaying a search bar and a list of patient names. The name 'TPHC, Test' is selected and highlighted in blue.

- Select the Patient
- Enter the Message in the Text Box



## Attach Files

- Click the "Attach files" button under the Text Box
- Click Send Message

## Medical Records

**Usage:** User can download patient medical records & F2F generated transactions from here.

### Steps:

- Click Medical Records menu
- The following screen is displayed.

The screenshot shows the user interface of the Agency Medical Records page. At the top, there is a blue navigation bar with the TPHC logo on the left, a hamburger menu icon in the center, and a user profile icon labeled "test2" on the right. Below the navigation bar, the page title "Agency Medical Records" is displayed on the left, and a breadcrumb trail "Home / Agency Medical Records" is on the right. A left-hand sidebar contains navigation links: "Home", "Messages", "Medical Records" (which is highlighted), "My Account", and "Log Out". The main content area features a "Select Patient List:" section with a dropdown menu. The dropdown is open, showing three options: "Please select" (highlighted in blue), "Please select", and "Test TPHC".



- Select Patient List from the Dropdown menu.
- Select the Date of Service/Encounter
- The following MR/F2F transaction details are generated for the chosen patient

Agency Medical Records

Home / Agency Medical Records

Select Patient List:  Date of service/Encounter:

Date Of Service	Document Type	Generated Date	Document View	Document Download	Message
2020-10-27	Admit Order	-----	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-10-27	Preliminary Medical Record	2020-12-11	-----	-----	<a href="#">Request Message</a>
2020-10-27	Face To Face	2020-12-11	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-10-12	Medical Record	2020-11-06	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-10-12	Face To Face	2020-12-11	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-11-01	Medical Record	2020-11-06	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-11-04	Admit Order	-----	<a href="#">View</a>	<a href="#">Download</a>	-----
2020-11-04	Preliminary Medical Record	2021-05-05	-----	-----	<a href="#">Request Message</a>
2020-10-16	-----	-----	-----	-----	<a href="#">Request Message</a>

The above transaction is Face to Face, so the user can see View and Download

- buttons Click the View button to view GENERATED Transaction

Agency Medical Records

Home / Agency Medical Records

612f7a484883b\_medical.pdf 2 / 3 73% Download

**Documentation of Face-to-Face Encounter**

Patient name and Identification: **Mr. Test TPHC, Male , DOB: 10-06-1997**

I certify that this patient is under my care and that I, or a nurse practitioner or physician's assistant working with me, had a face-to-face encounter that meets the physician face-to-face encounter requirements with this patient on: (insert date that visit occurred)

**10-27-2020**

Patient Home Bound or Can't Drive:

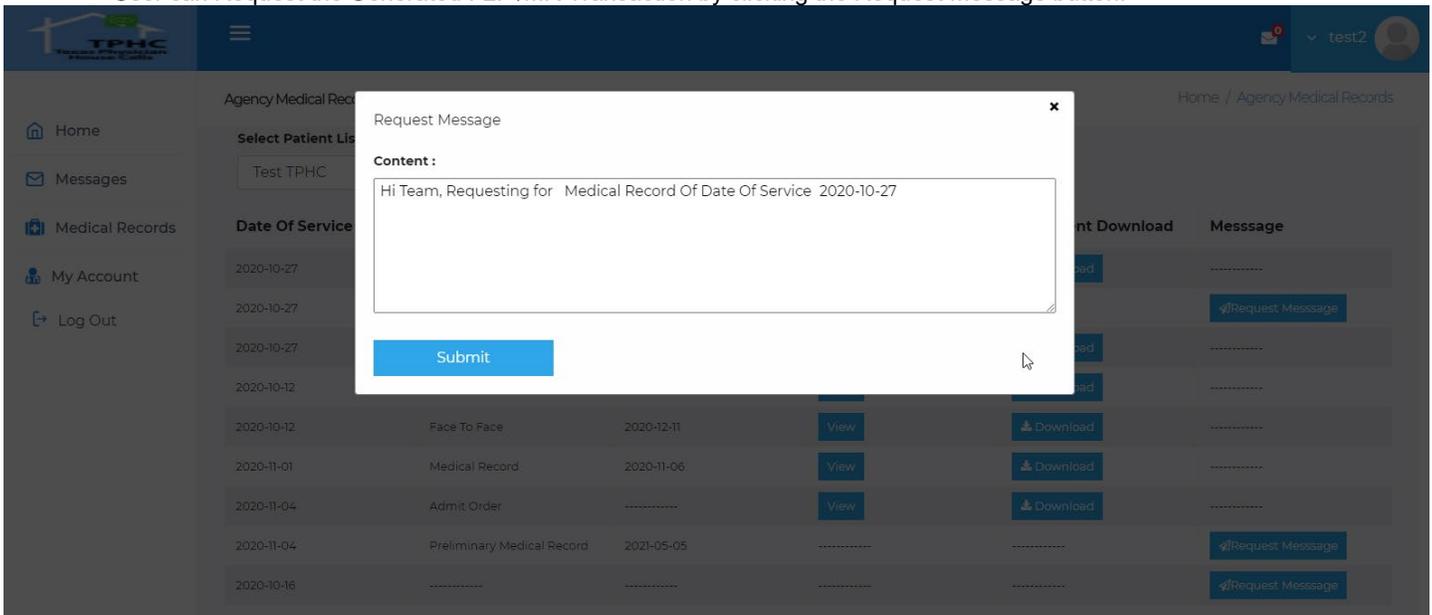
Is Home Health Care Needed:

Does Patient have reliable other Primary Care Physician:

Is House Visit Needed:

The encounter with the patient was in whole or in part for the following medical condition which is the primary reason for home health care and **HOW LONG:** (List medical condition)

- Click the Download button to download Generated Transaction
- User can Request the Generated F2F /MR Transaction by clicking the Request Message button.



- Enter the required details and click the Submit button.
- The message will be sent to the respective message owner.
- Completed Medical Records are generated in Agency MR.
- For a DOS, if a transaction is generated multiple times, recent generated transaction details are displayed in the Agency MR.

## My Account

- Click My Account menu
- User is redirected to My Account page

- The following Menu options are available in the My Account page:
  - Demographics
  - Manage Notifications
  - Change Password

## Demographics

The following fields are available on the Demographics page:

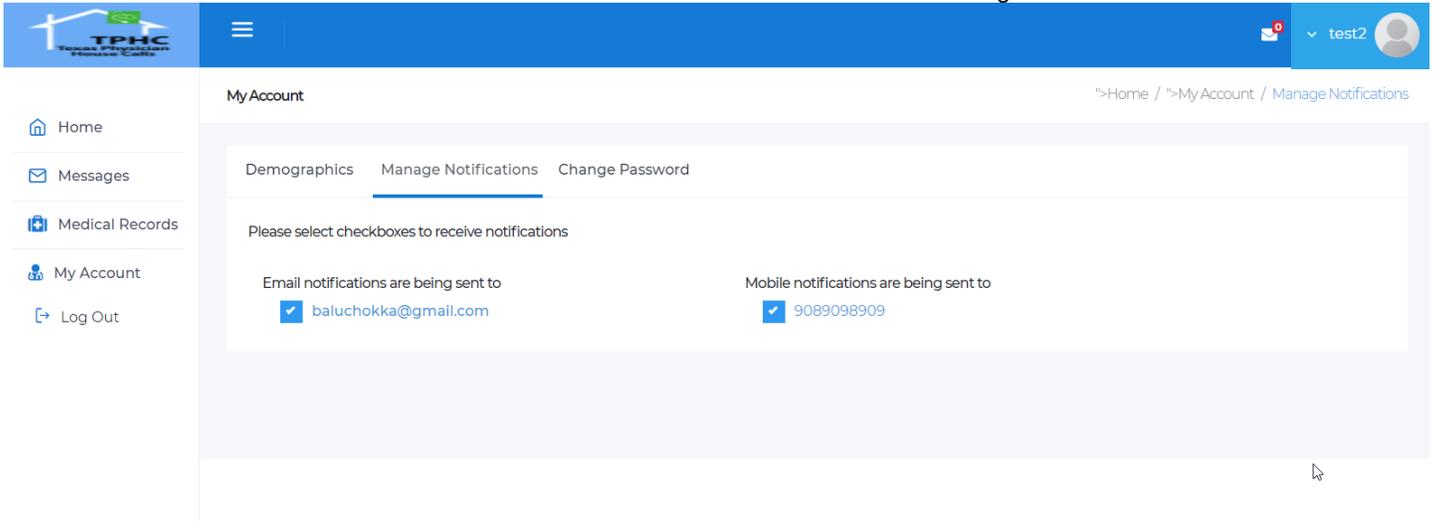
- Personal Information
- Address Details
- Contact Details
- Other Information

Enter all the required fields, if a user enters NPI, verification is mandatory.

- Enter NPI number,
- Click verify NPI button
- User NPI logs are displayed
- Click Submit button to save the data

## Manage Notifications

- User can click Manage Notifications to receive notifications
  - User can select Email notifications to receive notifications via mail
  - User can select Mobile notifications to receive notifications via Mobile messages

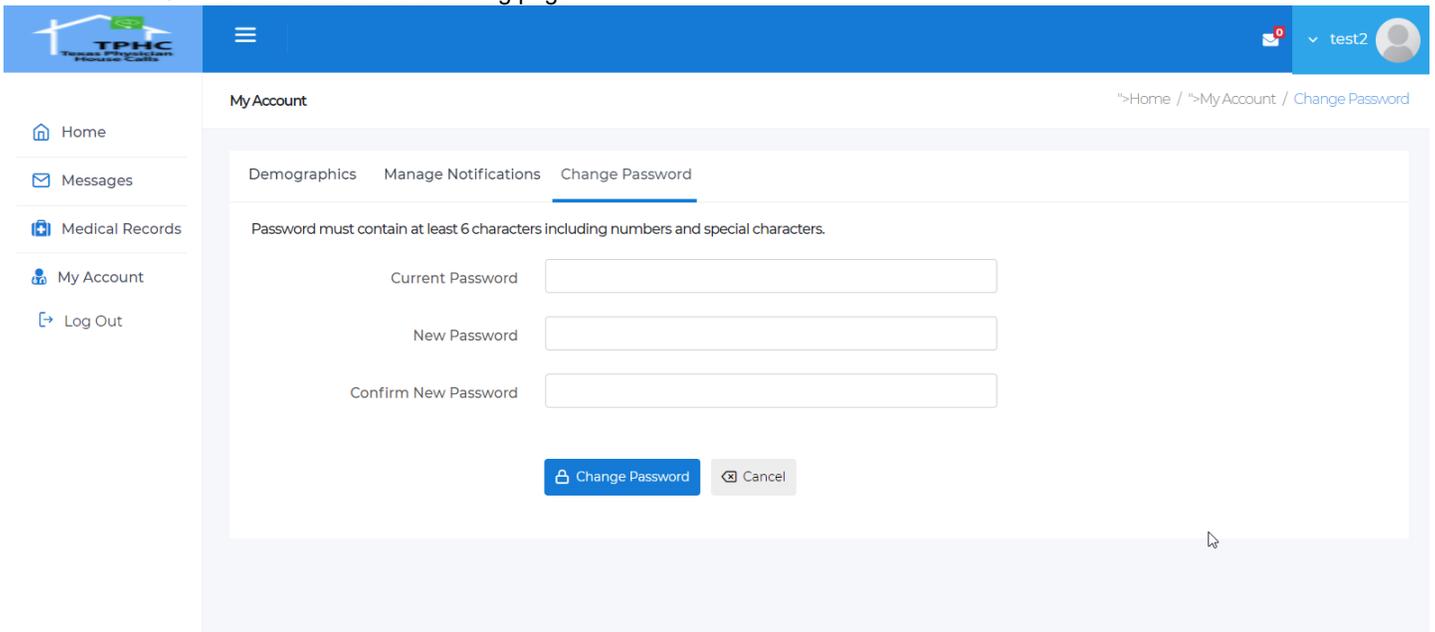


The screenshot shows the 'My Account' page with the 'Manage Notifications' tab selected. The page title is 'My Account' and the breadcrumb is '>Home / >My Account / Manage Notifications'. The main content area has three tabs: 'Demographics', 'Manage Notifications', and 'Change Password'. Below the tabs, it says 'Please select checkboxes to receive notifications'. There are two sections: 'Email notifications are being sent to' with a checked checkbox and the email 'baluchokka@gmail.com', and 'Mobile notifications are being sent to' with a checked checkbox and the phone number '9089098909'.

**Note: Please select at least one checkbox for communication purpose**

## Change Password

- Click Change Password
- The User is redirected to the following page



The screenshot shows the 'My Account' page with the 'Change Password' tab selected. The page title is 'My Account' and the breadcrumb is '>Home / >My Account / Change Password'. The main content area has three tabs: 'Demographics', 'Manage Notifications', and 'Change Password'. Below the tabs, it says 'Password must contain at least 6 characters including numbers and special characters.' There are three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. At the bottom, there are two buttons: 'Change Password' and 'Cancel'.



- Enter Current Password [**Existing Password**]
- Enter New Password
- Confirm New Password
- Click Change Password button
- A message is displayed to the user **“Your Password Has Been Changed Successfully”**.
- Click Cancel button to cancel the changes

### Logout

- Click Logout to exit from the Agency Portal