## Contents

- Introduction to the Consumer Portal ................................................................. 3
- Portal Navigation .................................................................................................. 4
- My Chart ............................................................................................................... 7
- Portal setup and customization ........................................................................... 9
- Widgets on your Homepage .................................................................................. 11
- My Account options and settings ......................................................................... 13
- Portal Password ................................................................................................... 14
- Notifications ......................................................................................................... 16
- Printing .................................................................................................................. 18
- Logging out of the Portal ....................................................................................... 20
- Timing out due to inactivity .................................................................................... 20
- Technical Help with the Portal .............................................................................. 20
Introduction to the Consumer Portal

What is the Consumer Portal?

The Consumer Portal is a personal healthcare website that provides Behavioral Health Services (BHS) consumers with access to their personal behavioral health information. Consumers can view their personal healthcare information records through a secure Internet site by using their email address to register.

What are the Benefits of the Consumer Portal?

• You can view their medication list.
• You can set up text or email alerts if a new medication has been prescribed.
• You can set up text or email appointment reminders and notifications of cancellations.
• You can look up health information on MedLine.
• You can link to other websites like mySFHealth Portal or SFDPH.org.
• Later, you will be able to receive surveys, self-assessments or self-management tools and other helpful links.

How to Register as a First Time User

1. You will need Internet access, a valid email address and a registration PIN from your behavioral health clinic.
2. Connect to the consumer portal website at https://www.sfdph.org/sfhealthconnect
3. Set up your account using the instructions on the PIN document you received from your clinic.
4. Create a password which is between 8 to 32 characters long, contains at least one number and does not start with a special character. Do not use a commonly used word. Select a unique combination of letters and numbers.
5. Choose a security question that is easy to remember.
6. Once you have set up your registration, do not share your portal password information with anyone you do not wish to view, download or transmit your personal health record.
7. You will receive an email confirmation that you have successfully created your portal account.
8. Congratulations! You can begin using the consumer portal to stay informed of your BHS personal health records.

What if I Forgot My Password?

1. On the portal login page, there is a Forgot your password? link. Clicking the link will prompt your for your email address and security question. Once you provide your email and security answer, the system will prompt you to change your password. Please see page 14 for step-by-step instructions.
Portal Navigation

Homepage

The Consumer Portal homepage provides an overview of your health information and clinic appointments; it contains a series of widgets displaying snapshots of health and appointment information as well as links to drill down for more detailed information.

Home Page Navigation and Widget Overview
7. Medical History

**Placeholder only**

<table>
<thead>
<tr>
<th>Diagnosis Date</th>
<th>Diagnosis/Disease</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No data available in table

8. Social History

**Social History Widget - Click link to drill down to the Social History detail page**

<table>
<thead>
<tr>
<th>Birthplace</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status</td>
<td></td>
</tr>
<tr>
<td>Children</td>
<td>Not Available</td>
</tr>
<tr>
<td>Activity Level</td>
<td></td>
</tr>
<tr>
<td>Tobacco</td>
<td>Current Some Day Smoker</td>
</tr>
<tr>
<td>Alcohol</td>
<td>Not on file</td>
</tr>
</tbody>
</table>

9. Immunizations

**Placeholder only**

<table>
<thead>
<tr>
<th>Date</th>
<th>Vaccine</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No data available in table

10. Pending Forms

**Pending Forms Widget - Click link to drill down to the Pending Forms detail page**

<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No data available in table

11. Problems

**Problems Widget - Click link to drill down to the Problems detail page**

<table>
<thead>
<tr>
<th>Reported Date</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/6/2016</td>
<td>Bipolar disorder</td>
<td>Active</td>
</tr>
<tr>
<td>3/31/2016</td>
<td>Recurrent anxiety</td>
<td>Active</td>
</tr>
</tbody>
</table>
1. The **Navigation Bar** is the blue bar near the top of the screen with links to the different sections of the portal. By default the Home section is displayed. To go to another section, like Medications, click on the word Medications.

2. The **Appointments Widget** allows you to view your upcoming appointments. To view all appointments and details, click the word Appointments in the title bar of the widget.

3. The **Medications Widget** lists behavioral health medications. You can view details of current and past Medications by clicking the word Medications.

4. The **Health Library Widget** is a free search engine that allows you to search for health symptoms, causes, treatments and preventions. The search engine uses the power of the Medline Health database.

5. The **Preferences and Customization** links allow you to customize your Homepage, view account information, view chart information and print your chart.

6. **Practice Pages** provides links to the SFDPH Website and mySFHEALTH (the SF Health Network primary care portal).

7. The **Medical History Widget** is not available at this time.

8. The **Social History Widget** will only show your smoking status at this time.

9. The **Immunizations Widget** is not available at this time.

10. The **Pending Forms Widget** is a placeholder for future surveys, self-assessments and management tools.

11. The **Problems Widget** is where you will see your active and inactive problems as identified in your Treatment Plan of Care.
My Chart

My Chart gives you an overview of your health information and demographics; it contains a series of widgets displaying snapshots of your information as well as links to drill down for more details.

My Chart Navigation and Widget Overview
12. The **My Chart Tabs** are a series of tabs that appear below the Navigation Bar (after clicking on My Chart). By default, the Chart Summary tab is displayed. To go to another tab, like Vitals, click on the word Vitals (where you can view details such as your blood pressure).

13. The **Chart Summary** widget displays demographic information such as your address and phone number.

14. The **Lab Tests Widget** allows you to view the results of labs that have been ordered by your Behavioral Health Provider. **Note this is still in a pilot phase and will not appear at this time.**

15. The **Social History Widget** displays your current smoking status.
16. The **Visits Widget** allows you to view the history of your visits with details such as date, location and type of visit.

17. The **Family History Widget** is not available at this time.

18. The **Allergies Widget** allows you to view allergies that have been recorded by your Behavioral Health prescriber.

19. The **Vitals Widget** allows you to view your blood pressure, weight and height if entered by your behavioral health provider.

**Portal Setup and Customization**

You have the option of customizing your Homepage, including adding your photo, adding widgets, removing widgets, and rearranging the placement of widgets.

**Customizing Your Homepage**
Adding Your Photo to Your Portal Homepage

If you have a digital image of yourself, you have the option of uploading it to your portal.

1. To add your photo, click inside the photo box (near the bottom) and the Update photo window will appear.

2. Click the Browse button to select a digital photo located on your computer and click the Open button to upload your selected photo.

3. Click the Save button.
Widgets on Your Homepage

Adding Additional Widgets to Your Homepage

1. On the Homepage, click the Add to Homepage link.
2. Once the Add widgets to my homepage box appears, check the items you would like to add to your Homepage. Items that are checked already exist on your Homepage.
3. Click the install selected widgets button.

Removing Widgets from Your Homepage

1. Hover the mouse over the upper right hand corner of a widget and the word Remove will appear.
2. Click Remove to remove the widget from your Home Page. (You can always add it again by using the Add widgets to my homepage feature described above.)
Rearranging Widgets on Your Homepage

1. Choose a widget you would like to move to another location.

2. Click and drag the widget to another location on your Homepage. (You will need to click and hold the left mouse button down on the title bar of the desired widget, move the widget to a new location, and then release the mouse button.)
My Account Options and Settings

My Account options allow you to change your email address, change your portal password and set up notifications. You can access your account options by clicking on My Account on the navigation bar or by clicking on View my account beneath your photo.

Changing Your Login Email Address

1. Click the View my account link from your Homepage.
2. In the My Patient Portal Account section, click the Change link next to your email address.
3. Enter your email address in the New Email field.
4. Enter your email address again in the Confirm New Email field.
5. Click the Confirm button.
Portal Password

Changing Your Portal Password

1. Click the View my account link from your Home Page.
2. In the My Patient Portal Account section, click the Change password link.
3. Enter your new password in the New password field.
4. Enter your new password again in the Confirm new password field.
5. Click the Change password button to save your new password.

Changing Your Password from the Login Page if You Forgot Your Password

1. Go to https://www.sfdph.org/sfhealthconnect
2. Click the Forgot your password? Link.
3. Enter your email address.
4. Click the **Continue** button.

5. Answer the **security question** that you chose during the registration process.
6. Click the **Answer** button.

7. The system will prompt you to reset your password.
Notifications

In the My Accounts section, you have the option to set up email and/or text message notifications for appointment reminders and new medications. If you would like to set up notification reminders, you must first edit your notification settings, then add a notification type.

Setting up Notifications Settings

1. Click the Edit notification settings link in the Notifications section of My Account

2. Type your email address in the Email section for email notifications.

3. Type in your cell phone number in the Phone number section for text message notifications. Note: If you change your phone number you will need to update it here to receive notifications.

4. If you choose text message reminders, you must choose your phone carrier from the Carrier drop-down list.

5. Click Save notification settings.
Adding Notifications

1. Click the **Add a notification** link in the Notifications section of **My Account**.

2. Choose a notification type from the **Notification Event** drop-down list.

3. Choose when you would like to be notified from the **Remind Me** drop-down list.

4. Choose how you would like to be notified from the **Delivery Type** drop-down list.

5. Click **Save Notification**.

6. Repeat steps for each notification you would like to receive.
Printing

You have the option to print your chart and/or sections of your chart, including current and past medications.

Printing Your Portal Chart

1. Click the **Print my chart** link from your **Homepage**.

2. Click the **Print This Page** button to print portal **chart**.
Printing Your Medications List

1. Click the **Medications** link from your Homepage navigation bar.

2. Click the **Print** icon on the **Medications** page to print both current and past medications.

3. Click **Print This Page** button to print your medications list.
Logging Out of the Portal

When you’re done viewing your Portal, it’s important to make sure you logout.

Logging Out of the Portal

To log out click the **Logout** link in to upper right hand corner of the portal.

Timing Out Due to Inactivity

If there is ten minutes of inactivity, the portal will display a warning that you will be logged out. You can choose to continue using the portal by clicking **Yes, Keep Me Signed in** or you will be automatically logged out in 45 seconds.

Technical Help with the Portal

If you have technical difficulties logging into the portal or have technical questions, please contact the Consumer Portal Help desk toll free at (855) 224-7782. Help Desk hours are 9:00AM-4:00PM Monday-Friday excluding holidays.