

myChart provides you with online access to your UMass Memorial Health (UMMH) medical record. It can help you participate in your healthcare and communicate with your providers. This guide provides an overview of many of myChart's features and how to use them.

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Navigation

Welcome & News Feed

After you successfully login, the myChart home page allows us to quickly provide you with important Announcements, upcoming appointments, and new messages. **[Dismiss]** them after viewing to keep your Feed Fresh and Timely.

If you have access to other loved one's myChart accounts, each of their appointments and reminders will follow yours on the Feed under their respective name.

Your Menu

Your Menu allows you to access every available activity. We know **Your Menu** is long, but the **SEARCH** function can help you find what you're looking for more easily.

Shortcuts

From the home page, Shortcuts at the top will allow you to define your top 6 activities for quick access. You will start with **[Schedule an Appointment]**, **[Messages]**, **[Visits]**, **[Test Results]**, **[Medications]**, and **[Billing Summary]** but you can change them to any activity you choose. If you change, those new activities will be saved for you, whether you use the web version or the mobile version.

- **Change your Shortcuts** activity is found on **Account Settings** submenu of **Your Menu**.

Your myChart Proxy Accounts

If you have access to your loved one's myChart as Proxy, you can easily access their myChart from yours with a single login.

Your Care Team

At any time, you can view your providers currently on your care team by selecting **View Care Team** from **Your Menu**. You can send a message, schedule an appointment, or see details on this provider.

Please note: Providers are manually added to the Care Team. This is not typically done in the outpatient setting other than the role of Primary Care Provider (PCP). You may still be able to message a provider not listed here by selecting the **MESSAGES** shortcut and going into the Message Center. Here you will find a full list of providers with whom you can message – any specialist with whom you've had an appointment in the last 3 years.

Logout & Return to Home Page

Logging out of myChart differs between the web and mobile versions.

- In the web application, You will select the **[Log out]** icon at the top right of the screen.
- In the mobile app, You will select the **[Log Out]** icon from the **[Switch Patients]** icon at the top right of the screen.

Returning to the Home Page after selecting an activity can differ between web and mobile.

- In the web application, you will often have a **[back to home page]** option at the end of the activity. Or, you can select the **[myChart]** icon at the top of the screen.
- In the mobile app, you'll more likely see a Cancel or a Close button.

Messages

View Messages from your Provider Care Team

You can read messages sent by your provider or other clinic staff by selecting the **[Messages]** Shortcut. Or, select **Messages** under the Communication Submenu from **Your Menu**. Both routes will display your Message Center Inbox and any messages sent to you.



If you're looking for a specific message, you can enter keywords in the **Search** field to locate it.

Select the message you want to read. From here, you can **[Reply]** to the message or **[Move to trash]**.



If you want to view a message after you've sent it, you can do so by going to **Messages > Sent Messages**. Messages that appear in bold text have not yet been read by clinic staff.

Ask your Provider Care Team a Clinical Question

If you have a non-urgent medical question, you can send a message to your Provider's clinical team – it does NOT go directly to your provider but instead to a triage pool to provide quicker response. The clinical staff may answer you directly or may forward to the provider to answer. This message is secure, meaning your information stays private as it is sent over the Internet.

You can use this feature if you're not sure whether you should come in for an appointment, if you need billing 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.

Messaging is not intended for communication about an urgent issue. You should still call your provider's office if urgent or call 911 if an emergency.

Go to your **[Messages]** Shortcut and then Select **[Send a new Message]**.

Or, select **[Ask a Question]** under the Communication Submenu from **Your Menu**.

Select **[Medical Question]** and then select on the type of question you would like to ask - we recommend the **[Non-Urgent Medical Question]**.

Select a recipient from the list of providers. You can select your Primary Care Provider (PCP) if they are a UMMH provider. Many of our Specialists are also available if you've had an appointment with them in the last 3 years.

If you have had a messaging conversation with your selected provider within the last five days, you will have the option to **start a new conversation**, or **continue a recent conversation**.

1. Select a subject for your message and enter your question. PLEASE enter only one topic per message. You can enter multiple messages if you have multiple topics to discuss. Separate messages make it easier for staff to triage and delegate appropriately and provide more timely responses.
2. If applicable, you can even add a picture to help your provider understand the reported concern. Select the paperclip icon to Attach an Image or short video clip and select from your personal media files.
3. When you are finished, select **[SEND]**.

Your clinic will respond to you within two business days. If you are communicating with us in a language other than English, your message may take longer as we need to translate to English your message and then our response back to your submitted language.

You will receive an email notification in your personal email letting you know that the clinic has responded to your request. You will then sign on to myChart to read the content of the response.

If you are using myChart Mobile, you will also receive a PUSH notification on your phone. If you do not want to receive PUSH notifications, turn off in the settings on your mobile phone.

Ask a NON-Clinical Question to another department.

If you have a **non-urgent, non-medical question**, you can send a **Customer Service** message to other departments at UMMH. These staff persons are not familiar with you and your healthcare and the messages are not read and responded to in the same timeframe as a clinical message to your provider's office. Do NOT use this activity for clinical messages, they will take a much longer time to respond as they may be routed to various departments to find the appropriate person/response.

Select **Customer Service Question**, for other message options: Billing, Scheduling or Medical Records. Here you will be able to send messages to:

- Staff to help if you need **insurance or assistance paying a bill**. *If your language is not English, please call 800-225-8885 for assistance with an interpreter.*
- Staff to answer questions about the **use of the myChart** or make suggestions to the application.
- Office of Patient Advocacy to **complain** about care or **compliment** on great care.
- Health Information Management (Medical Records) to request corrections to content of your clinical information seen from your myChart account.

Letters

Sometimes you may need a Return to School/Work note or a School or camp form. In this case, you will find it in the **Letter** Activity of your myChart.

1. To find this, go to your myChart **Menu**
2. Scroll to Letters or type **Letters** and select it.
3. You can view all your letters in a list in this activity
4. You can print from a web browser by selecting the printer icon on the right side of the page.

Appointments

View Your Past Appointments

To access a visit summary or notes from a previous appointment, Select the **[Visits]** shortcut. You may see many types of encounters with UMMH staff here not just in office appointments. For example, Telehealth appointments and outreach phone calls.

If you have received care at other organizations that use the Epic software, those visits and their After Visit Summary from those organizations may appear alongside your past visits from UMMH. These outside visits will appear with the CE (Care Everywhere) icon.

You can keep this view or filter what you see. You can filter by:

1. Organization
2. Upcoming, Past or both (default)
3. Doctors (Providers)
4. Departments
5. Specialties

With the Filter Option toggled ON, you can select specific appointment types and whether you would like to see canceled appointments.

View Notes written by your Provider during your Past Visit

Notes written by your provider and the After Visits Summary are 'attached' to their respective visit. Find the desired Visit to then find the associated notes **[View notes]** or visit summary **[View After Visit Summary]**. You can simply View on screen or select the printer icon at the top right to print to your desired printer.

If you are viewing myChart in a language other than English, your provider note will NOT be translated. If you would like interpreter assistance for the note, reach out to your provider's office and they can discuss with you using our Interpreter Services.

Please note: printing is not available on mobile, it is only available via web access at this time.

Schedule an Appointment

Directly scheduling an appointment means that you schedule the appointment yourself by choosing from a list of available appointment times. You can select your Primary Care Provider (PCP) if they are a UMMH provider. Many, but not all our Specialists are also available to schedule appointments with if you've already had an appointment with them in the last 3 years.

1. Select the **[Visits]** shortcut and then **[Schedule an appointment]**.
2. Choose a provider OR the specific reason for scheduling an appointment. You will have to answer additional questions, depending on the route you choose.
3. Choose an appointment from the list of available times. This list can also be filtered based on your preferences such as day of the week, provider gender or type.
Your appointment will be reserved for a ten-minute reservation period, so that no other patients can select the same opening for the time slot while you finish scheduling the appointment.
4. Enter specific comments as to why you would like to be seen for an appointment.
 - You can also choose to get on the wait list and be notified if an earlier appointment opens up.
 - If you routinely schedule recurring appointments for the same day/time, you can even choose to save for ease the next time.
5. Select **[Schedule]** to complete and the confirmation will appear on the screen.

Once scheduled, the appointment details will display, and you can **[Add to Calendar]** to add the appointment to your personal calendar (associated with the device you are on) and/or Print it.

Lastly, if the appointment is within 7 days, you can **PreCheck-In** (see that section). Else, you can return to the **[Visits]** tab, find the appointment and PreCheck-In a day or two before the appointment. PreCheck-In allows you to update your information (address, contact info, insurance, medications) and complete documentation you'd normally do in the waiting room, from the comfort and privacy of your home and potentially save time in the waiting room.

You can also schedule an appointment with a NEW provider/department to you. Many, but not all our Specialists are available for NEW PATIENT appointments via myChart.

Schedule an Appointment for a procedure your provider ordered for you.

Some Appointment types can be scheduled through myChart after your provider has placed the order for you to have the procedure done (ex: Mammogram).

You will receive a notification that there is an appointment for you to schedule.

1. Answer the questions required, if any.
2. Select the location you'd like to have your appointment.
3. Select the time you'd like your appointment
4. Verify the appointment information and **[Schedule]** the appointment.

Reschedule an Appointment

Some Appointment types can be rescheduled through myChart up to the time of the appointment. To reschedule an appointment (when available):

1. Select **[Visits]** from your Shortcuts.
2. Under Upcoming Visits, select **[Reschedule appointment]**.
3. Pick the location. (some appointments may not allow you to switch locations)
4. Pick the Date and Time that works best for you.
5. Select the reschedule reason and select **[Schedule]** to complete.



Some appointment types will not allow you to Reschedule via myChart. Certain specialty departments require a patient to call and speak with staff as the appointment timing is critical or you may need special instructions.

Cancel an Appointment

Some departments allow you to cancel your next appointment through myChart, at any time, up to the time of the appointment. To cancel an appointment:

1. Select **[Visits]** from your Shortcuts
2. Under Upcoming Visits, select **[X Cancel appointment]**.
3. Select the cancellation reason and then **[Confirm cancellation]**.



Some appointment types will not allow you to Cancel via myChart. Certain specialty departments require a patient to call and speak with staff as the appointment timing is critical or you may need special instructions.

PreCheck-In for an Upcoming Appointment

To save time on the day of your appointment and give yourself time and privacy, you can update your information up to 7 days in advance by performing a **PreCheck-In** from your myChart account. Think of this like a PreCheck for a flight.

PLEASE remember that you must still introduce yourself to the check-in desk so that they know that you have arrived. You will also still be required to show a picture ID for identification purposes.

1. Select **[Visits]** from your Shortcuts
2. Under **Upcoming Visits**, select **[PRECHECK-IN]**. If you have more than one appointment coming up within 7 days, you will see all the appointments together on one screen. You will be prompted through the various components of the PreCheck-In update screens; Medications, Allergies, Health Issues, Personal Info, Patient Contacts, Insurance, Sign Documents, Questionnaires, and Payments (co-pay). Components may vary between different types of visits. As you progress through each component, you will advance (Bold indicator) on the timeline.
3. On Clinical component screens (Medications, Allergies and Health Issues), you can:
 - a. Request an Addition **[+ ADD A HEALTH ISSUE]**
 - b. Request a Deletion **[REMOVE]** or
 - c. Accept the information **[This information is correct]**.
Clinical Staff will review the requested changes. Some may update shortly after your submission, others may wait until you meet with your provider at the visit.
4. In the **Personal Information** section, you can update and/or verify Contact Information and the **Details About Me Section**. There are options such as “choose not to disclose” or “I choose not to answer” if you do not want to choose one of the answers listed.
5. On the **Insurance** screen, you will need to select the person responsible for payment. You can Update or Add a coverage on this screen. You can also attach an uploaded image of your insurance card, front and back – so you don’t have to bring it to your appointment.
6. For **Consent** forms which require patient signature, we now have the consent forms available via PreCheck-In so you can e-Sign them in advance of your arrival. You can also choose to auto-generate a signature or draw a signature. Whichever option you choose, you can select to Save for future use.
7. You will likely be asked to complete some **Questionnaires**. Which questionnaires you will be asked to complete will vary according to the department, type of visit and frequency of visits. Over time, you will notice that more and more clinics will add their questionnaires to myChart so that you can complete these ‘forms’ in advance of your arrival, rather than the current process of completing them in the waiting room.
8. On the **Payments** screen, you can authorize your visit copay or choose to make the payment later. If you have outstanding payment for another account, you will have the option to pay those on the next screen.
Your credit card will NOT be charged until the day of your appointment and you will receive an email receipt notification when the charge is processed.

Accept an Earlier Appointment Invitation

If you indicated that you wanted to be on a wait list when you made your appointment, you will receive a myChart notification if an earlier appointment becomes available.

Upon entering myChart, you will see the invite on your News Feed. You will see both the New offered time and the Existing Time. Select **[Accept New Time]** or **[Keep Existing Time]** depending upon your desired appointment day/time.

If you accept the new time, your appointment will be adjusted in myChart (your old appointment will be automatically cancelled).

The offer is only good for a specific amount of time and is sent to multiple patients, so the appointment may no longer be available when you login.

On My Way

You can view all available Emergency Room and Urgent Care departments to see which is closest to you and also let the staff you will be arriving soon.

This function is not intended for a truly urgent issue. You should call 911 or go directly to the Emergency Room if there is an emergency.

1. In the myChart menu, select **Find Urgent Care**.
2. You will be able to see a list of all available Emergency and Urgent Care Departments display on a map with their status/hours of operation.
3. Select the department you wish to visit.
4. Enter the approximate time you will arrive at your destination, then select **[I'm On My Way]**.
5. Enter your mobile phone number, confirm/edit your email address, and enter the reason you are seeking care. Then select **[Submit]**.

Symptom Checker

The Symptom Checker tool can direct you to the right level of care for your symptoms.

This is the first and thus the only Self-Triage available currently. **Is it Covid? Is it the Flu? What should you do?**

Before proceeding, you must acknowledge both the Terms and Conditions of use and must indicate you understand you are interacting with a computer, all info is stored within myChart and you should **call 911 or go to the nearest emergency room if you feel this is an emergency.**

You will then be presented with a series of questions. Depending on how you answer the question, you could get another question or instructions.

COVID -19

COVID-19 Vaccination Status & Test Results

Your COVID-19 vaccination status and test results are available at all times in myChart without having to carry around a paper vaccination card or test results.

To view your COVID-19 information, you can select either the (1) **QR Code/COVID-19 icon** at the top of your main page or (2) go to your Menu to find **COVID-19** in the My Record section.

As you start to go back to work, travel, or attend events such as a concert or sporting event, you might be asked if you've been vaccinated for COVID-19 or if you have recent test results. You can share your information quickly, easily, and securely, right from myChart by:

- Generating barcodes that can be scanned right from your mobile device.
- Downloading a PDF document that includes your vaccination barcodes. (Test result barcodes are not included in the PDF.)
- Exporting your information to another application.

The barcodes that appear in myChart are created according to an open industry standard called SMART Health Cards. They contain verified information and only what is relevant to COVID-19, including your legal name, date of birth, COVID-19 vaccination information, and your most recent COVID-19 test result. You decide how much to share and with whom—you can share only your test results, only your vaccination information, or both. To learn more about SMART Health Cards, refer to the following website: <https://smarthealth.cards/>
You can also watch a video on YouTube to learn more about sharing your information:

- For the MyChart website: <https://youtu.be/rOQVTuucc54>
- For the MyChart mobile app: https://youtu.be/Wlj_xkukNrA
-

If a vaccination that a patient received isn't available in MyChart, you can fill out a questionnaire to manually add the information and submit for review. You can find an option to **[Update]** at the bottom of the Covid-19 activity labelled **[Not seeing your vaccine dose?]**.

Generate a QR code with your COVID-19 Information

To generate a barcode that can be scanned by whoever requested it, select **[QR codes]**. If you have both COVID-19 vaccinations and test results on file, you'll have separate barcodes for each of them, and you can choose whether to allow someone else to scan only one or both.

Download a PDF Document with Your COVID-19 Vaccination Information

You can now access QR codes with your verified vaccination information through the PDF documents you can download in the COVID-19 activity in myChart. To do so, select **[Download/Export] > [Download vaccination PDF]**. Patients who don't use smartphones can print the PDF to take their vaccination information with them wherever they go and share the information when needed for travel, events, or work.

The QR code contains the patient's SMART Health Card, which includes basic information about the patient such as their legal name, birthdate, and details of the COVID-19 vaccinations the patient has received.

Export Your COVID-19 Information to Another App

Select **[Download/Export]**.

If you're using the MyChart mobile app: A series of screens appears to help you verify that you have another app installed on your device into which you can export your information. Then, another screen appears to show the data you can share. If you have both COVID-19 vaccinations and test results on file, a checkbox appears for each one. Select the checkbox for the information you want to share with the other app, and then select **[Export]**. Select the app into which you want to export your data and follow the instructions in that app.

If you're using the UMMH's myChart website: If you have both COVID-19 vaccinations and test results on file, a checkbox appears for each one. Select the checkbox for the information you want to share through the other app. Then, select **[Export]**. A copy of your information is downloaded to your computer or device. To import it into another app, go to that app on a mobile device and follow the app's instructions.

Apple Health and Wallet

If you have QR codes for vaccination and testing credentials in MyChart, you can easily export those QR codes to Apple Health with the select of a button using iOS 15.0 or higher.

In iOS 15.0, patients select the Works with Apple Health button below the vaccination or testing QR code to export their information.

In iOS 15.1 or higher, patients select the Add to Apple Wallet & Health button below the vaccination QR code or the Works with Apple Health button below the testing QR code to export their information.

After selecting one of these buttons, the export workflow is done outside of myChart by iOS.

See COVID-19 Test Results and Vaccination History on the Login Page

You can now easily access your COVID-19 vaccinations and test results without logging in to myChart. Whether you're traveling, returning to work, or attending an event, you can quickly show your COVID-19 information to anyone who needs it.

Before you can see this information on the login page, you'll need to enable the COVID-19 Status Preview. You can turn the feature on and off by toggling the **COVID-19 Status Preview** option in **Menu > Account Settings**. You'll be taken through the onboarding workflow when turning it on.

The COVID-19 Status Preview appears at the bottom of the login page. When you select [**Show Details**], you'll see your legal name, date of birth, COVID-19 vaccinations, and most recent COVID-19 test result.

My Record

View your Test Results

With myChart, you can view your test results. At UMass Memorial Health, we believe that sharing information builds trusts and better relationships. We also believe you should be able to see your results and notes as soon as they are available. Most results release automatically after being finalized. This rapid availability is in accordance with the 2021 Cures Act, which mandates us to provide full transparency with you about your clinical care.

Test results can be hard to understand. Some people experience anxiety and worry when they read their test results without speaking with their provider. Even when test results are outside of the normal range, they are frequently nothing to be concerned about. Sometimes results require more testing. Sometimes results may show a serious disease, like cancer.

Most patients look up their results immediately. Others may prefer to wait until their provider's office contacts them. If you have not heard within a few days, or if you cannot wait, you may want to contact your provider's office before viewing the results on your own. It's always best to contact your provider during normal business hours so you can reach your whole care team, unless you have an urgent problem.

If you wish, in the future, you can ask your provider to delay ordered test's results allowing for time for the provider to view and then discuss them with you. Because we release your results faster, you may see your result before your provider does. We encourage you to be patient until your provider reaches out with an explanation of your results. You can now indicate if you'd like all your results available **immediately** or if you defer to letting your **care team decide** when to delay. This setting is available on your [Test Results] tab

If your provider has entered comments about the result for you, they will be displayed on the main Test Results page, and on your Test Results Details page as **[Comments from Care Team]**.



Some providers like to send you a separate letter with test result explanation instead of adding a comment on the result. You can find these in the [Letters] section of Your Menu,

For Laboratory results, you will be able to see the Standard Range for that test's result, and where your result falls within the Standard Range. For multi-component tests, you can see each individual component of the result graphed according to what is in normal range or outside range. This visual color coding will help you interpreting your result. You can see if the numeric result falls within the configured normal range. Non-numeric test results appear with just the result value and the normal value for comparison.

You can trends for certain lab values, and compare your results to past results. To do so, select [Compare result trends] to compare all components of a test, or [View trends] to view only one. You may **[Download]** a table of your results in PDF format at the bottom of the screen.

[Return to the top of the document](#)

The provider review status banner will display if you are seeing a test result before your Provider has reviewed it. The banner reads, "Not yet reviewed by care team" and includes a "See details" link that opens a separate window with additional details.

If you are viewing myChart in a language other than English, your result will NOT be translated. Laboratory results could be determined based on the translated framework of the page and visual indicators. If you would like interpreter assistance for the result, reach out to your provider's office and they can discuss with you using our Interpreter Services.

Patient Entered Results

If you use a personal health device at home, such as a glucometer, these results are available in a different location. (see last topic in this section). Go to the **Track My Health** activity in **Your Menu**.



Patient Entered Flowsheets must be ordered by your provider for us to collect the data. This assures us that your provider is expecting the results and will view them in a timely fashion.

View a Summary of Your Health Information

To get a summary of your medical record, select **Health Summary** from **Your Menu**. This summary includes a tab for each:

- ✓ Current Health Issues
- ✓ Medications
- ✓ Allergies
- ✓ Immunizations
- ✓ Preventive Care

Plan of Care

In the rush of everyday life, it's easy for people to forget To Do items such as Health Reminders and Tests which your provider has ordered and asked you to schedule. myChart can help with reminders of when recurring checks should be done so that patients can schedule them prior to them becoming overdue.

We have a few Health topics set up (with more to come):

- Mammogram (2 months prior to due date)
- Hemoglobin A1c (Glycohemoglobin) Lab Test (1 week prior)
- Urine Microalbumin Test (1 week prior)
- Diabetic Eye Exam (1 week prior)
- Colonoscopy

Patients who qualify for the coming due timeframe will receive a notification via a myChart message and it will display in your To Do section. Select **[Request This]** to schedule with your PCP office (or have them order the associated test).

Patient Education

If you have Patient Education assigned to you, whether through a Care Plan or an inpatient visit, you can now view and complete this in your myChart.

Upcoming Tests and Procedures

If your provider orders tests and procedures for you during a visit, you can find these by navigating to the **Upcoming Tests and Procedures** activity from Your Menu.

You can download and print a copy of your lab requisitions and order reports by selecting **[Download document]** next to applicable labs and procedures. **This is not necessary at UMMH or local Quest labs.**

Eye Center Prescriptions

If you are a patient of UMass Memorial's Eye Center, you can view and print your last eyeglass or contact lens prescription by selecting **Eyeglass Prescription** from **Your Menu**.

Manage Your Medications

View your Current Medications

Select the **[Medications]** Shortcut to see all your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the provider who prescribed the medication.

See Future Medication Refills

Providers and technicians can schedule future prescription refills and you can view these scheduled refills, along with the amount of refills, from the Medications Page.

Request a Medication Renewal

You can request a renewal for a medication prescription directly through myChart, rather than by calling your provider's office.

1. From the medication list, select **[REQUEST RENEWALS]**.
2. On the **Request Medication Renewal** page, select the check box next to the medication(s) you need renewed and enter any comments.
3. Select **[NEXT]**.
4. Select a pharmacy from the dropdown of pharmacies you have used in the past, or choose Other to designate a new pharmacy.
5. If you have a copay, you may opt to make a payment now or at pick up for **UMass Pharmacies onsite only**. Additionally, myChart will show cost due, along with your last fill payment.
6. Select **[NEXT]**, confirm, and then **[SUBMIT]**.

*Pharmacies listed will be the onsite UMass Memorial Health's dispensing pharmacies. Retail pharmacies are **not connected** to myChart for refills, you must contact them directly.*

You will receive a message in your myChart Inbox when your prescription refill is processed **IF** you use one of the UMass Memorial onsite Pharmacies, located at the University or Memorial campus.

Definitions:

Renewal – is done by your provider when you no longer have any refills left at your pharmacy.

Refill – is done by your pharmacy, fulfilling each prescription the number of times your provider allowed.

If you are viewing myChart in a language other than English, Medication names will not be translated, but the framework around the medication details is translated.

Track your Daily Health Readings Online

Your provider might request that you record information, such as your daily glucose or blood pressure readings, in myChart. When you enter the information in the **Track My Health** activity found on **Your Menu**, your provider automatically receives the readings, so they can monitor your progress.

Record a new reading in Track My Health

1. Select the **[Messages]** Shortcut. Open the message from your provider about a new flowsheet. The flowsheet is what you use to enter your readings in the Track My Health feature.
2. Open **Track My Health** by selecting the link in the message.
3. Select the flowsheet's name to open it, and then select **[Add New Data]** to start recording your readings.
4. Add the date and time for your reading. If you just took your reading, select **[Now]** to add today's date and the current time.
5. Enter your reading and select **[Continue]**. Or if you have multiple days of readings, select **[Add Another Reading]**.
6. On the next screen, verify that you have entered your reading correctly and select **[Submit]**. You'll return to the flowsheet page, where you can see your reading.
7. If you need to change or remove a reading after you've submitted it, you can do so by selecting **edit** or **delete** at the bottom of the table.

If you have a personal health device, such as a Fitbit or a Withings monitor, or AppleHealth or GoogleFit account, you can LINK the account to your myChart account **[CONNECT MY ACCOUNT]** and they will be synchronized once/day (will not show immediately). This requires a different Flowsheet than the one for manual entry and thus, must be ordered by your provider. For Fitbit & Withings devices, have your provider order the **Personal Health Monitors & Trackers** Flowsheet.

Track your readings over time in a table or graph

After you have entered readings, you can view trends and track your progress over time.

1. Select the **Health** activity in **Your Menu** and select a flowsheet's name to view previous readings in a table.
2. From this page, you can:
 - Change the orientation of the **Table**. Select **More Options** to choose whether dates appear as rows or columns.
 - View the readings in a graph. Select **Graph** to change the display.
 - Customize the date range or the number of readings that appear. Change the **From** and **To** fields or the **latest values** field and select **[Apply]** to update the display.
 - If you enter an abnormal value, the data will display in **RED** with an A, H or L (abnormal, high or low) following – you will also be prompted to contact your provider.

Requesting Your Records from UMMH

Sometimes, you need access to your records so you can share with a provider outside of the UMass Memorial Health Network or you may like to carry your records with you while you travel. You can request a formal copy of portions or all of your health record from the Health Information Management department (aka Medical Records). You can save your health summary to a USB drive or other device to carry with you in case of emergency.

1. Select **Sharing Hub** from the Sharing submenu on **Your Menu**.
2. Select **[Request formal copy of health record]**.
3. Complete the Form and submit. Our HIM Department will fulfill your request and send your records back to you in myChart.

Downloading your Records

Sometimes, you need access to your records so you can share with a provider outside of the UMass Network or you may like to carry your records with you while travelling. You can save your health summary to a USB drive to carry with you in case of emergency..

1. To access your records, select **Document Center** in the My Record submenu from **Your Menu**.
2. Select **View, Download, or Send Visit Records** (or **Requested Records** if you requested portions of your medical record from the Health Information Management department – see prior section).
3. Choose a tab for the visit(s) to view/download/send by: **Single Visit, Date Range, or All Visits**.
4. Select WHICH visit(s) and then either **[DOWNLOAD]** or **[Send]**.

If you have requested your medical record or portions of your medical record from the Health Information Management department via a phone call, email, or via myChart Sharing Hub you have the option to receive the documentation in myChart – just note in your request that you would like to receive them via myChart.

1. Select **[Requested Records]**.
2. You should see your Request, Select **[DOWNLOAD]**.

Sharing your Record

The Share my Record page has been redesigned to help you better find the right sharing option based upon your needs.

To Share with People

The **Friends and family access** option allows you to:

- a) view who already has proxy access to see your record
- b) view who you have proxy access to see their record
- c) grant proxy access to see your record to another person with a UMass Memorial Health myChart account access.
- d) revoke current proxy access from viewing your record.

To Connect with Hospitals and Doctors

As a myChart patient, you also have the option to ‘share’ your medical record with a provider in your presence to assist them with review of your Health Records.

If you are somewhere and the provider is not able to access your record electronically (i.e., out of the country), you can also use the **Share Everywhere** option allowing you to grant temporary **one-time access** to any provider anywhere. Internet access is all that's needed, which means even a provider across the world could view your chart to provide care. Access is granted by you to the provider in person – by identifying the person by name, and providing the Share Code and webpage www.shareeverywhere.com. The provider must access the chart within 60 minutes and access ends as soon as the provider exits your record.

School and Camp Form

It is now easier for parents and guardians to get their child's physical forms for school/camp/daycare. This can be found in three places.

- 1) **Explore More Card** on the bottom of the Home Page
- 2) A direct link to the School Health Summary at the bottom of the Sharing Hub
- 3) From the **Anyone Else** card within the Sharing Hub

Link your myChart accounts

You can link your myChart account to another myChart account that you have with an organization that also Epic with the **Link my Accounts** activity. This can be found on the **News Feed** or from **Your Menu**. Be sure you have the participating organization's login information and follow the prompts.

Once you've linked your accounts, you can access them easily at the bottom of your health feed.

Third-Party Apps

You can authorize individual types of data requested by third-party applications. This allows you to see the specific resources for which the third-party app is requesting access. Additionally, you can set a time limit as to how long the app can have access.

View Device Connections

This option is used to view your connections after setting up via your personal health account, like Apple Health (see next section for setup).

You can also access your **Linked Apps and Devices** directly from **Your Menu**.

Connect your Apple Health with your myChart

If you use Apple Health, you can connect with your UMMH myChart account to pull down select clinical data to your iPhone.

1. Open the Apple Health application on your iPhone.
2. Select **[Health Data] & [Add Account]**.
3. Find one of the UMass Memorial Health locations – it does NOT matter which one you select, as we are one system.
4. Check that you have read the statements on screen and if you agree, then **[Allow Access]**.
Please note: the access is being granted to the third-party application, so please read the statements, including those about refresh tokens and length of access.
5. You have now made the connection. Select **[Next]** to see your records in Apple Health.

Connect your Google Fit Account to myChart

You can similarly connect your myChart to your Google Fit account.

1. Open the myChart mobile application on your phone.
2. Find the **Track my Health** activity on **Your Menu**.
3. Select **[Manage Connections]** and then login to your Google Fit account.

Once signed in, you can select which categories you want to allow myChart to update and read. Your data will sync automatically when connected to wifi.

Please note: the access is being granted to the third-party application, so please read the statements, including those about refresh tokens and length of access.

Data will **only** display if your provider has placed the myChart Fitness Device order. Once the steps above have been completed, your data will automatically sync and send to your provider when you are connected to wi-fi.

4. To manually sync, open the Track My Health feature, select the **Connect to Google Fit** button, then select the refresh button at the top right.

Billing and Insurance

View your outstanding balance

To see the outstanding account balance and recent payments for any of your accounts, Select **Billing Summary** from the Billing submenu on **Your Menu**. Here, you'll see all your accounts with links to individual statements and bill payment features. To view additional information about an account, select **[View account Details]** under Outstanding Accounts.

To better help you understand your insurance benefits, the Overview tab of the Billing Details page now includes a new Insurance Benefits sections. Within this section, you can see progress bars indicating how close you are to meeting your insurance plan's deductible and maximum out-of-pocket amount. You can also jump to other insurance pages for additional details.

You can also see the status of your accounts in the account details section for each account you have. A “badge” appears next to each account you have, indicating the status you have. You can view this by Active accounts, Year to date, Last year, and for a specific date range.

Make a payment

When you have an outstanding account balance, you can make a payment directly through myChart. You can pay toward all eligible accounts at once, instead of having to make individual payments. Additional accounts will only show up if they have a non-zero balance.

1. Select **Billing Summary** from **Your Menu**.
2. Select **[PAY NOW]** on the bill to pay.
3. Select **[Amount Due]** or enter **[Other Amount]** and select **[NEXT]**.
4. Select how you would like the dollars applied to the respective outstanding balance, if applicable.
5. Select how you want to pay your bill (Apply Pay, Goodle Pay, Credit/Debit Card, or directly from a bank account). Enter the requested payment information, which will vary based on the payment method you. Select **[Submit]**.

Paperless Billing

Paperless Billing is on by default for all myChart users. If you'd prefer to turn it off:

1. Select **Billing Summary** from **Your Menu**, select the **Paperless Preferences** link. The green leaf indicator displays if paperless is turned on.
2. Toggle the **Paperless billing** switch if you wish to receive paper statements.
 - a. You can also edit contact information or
 - b. billing notification preferences from this page.

Sign up for a Payment Plan

If you are unable or prefer not to pay your entire balance at one time, you may set up a payment plan from the **Billing Summary** activity.

1. Select **[Set up payment plan]**.
2. Enter the amount you want to pay per month and then **[Select payment method]**
3. You can choose a current payment method on file or enter a new one. Select a payment method, enter bank account or credit card information, save your payment method, then review your plan.
4. Once the payment method has been entered, you will be able to confirm the plan and make any changes necessary.
5. Once a payment plan has been set up, the **Billing Summary** activity will reflect the amount currently due, as well as the total balance of the payment plan.

You can now also update the payment method associated with your Visit Auto Pay Agreement. To do so, select **[Manage Payment Plan]** under the scheduled amount for Auto Pay on the **Billing Details** page.

On this page, you can update the following:

- a. monthly payment amount
- b. payment method
- c. day of the month payments will be made

Please note: Because changing the payment method can also change the payment date (so that patients have enough time to ensure the new payment method has sufficient funds), patients can change their payment method a maximum of two times per Visit Auto Pay agreement. After that they must call the billing office to make further changes.

Apply for Financial Assistance

If you need assistance paying your UMMH bills, you may qualify to receive Financial Assistance. In order to be eligible, you must 1) apply for state or government sponsored medical assistance programs for which you may qualify, and 2) provide verification of all household income, complete, and submit the Financial Assistance application.

1. Select **Financial Assistance** from **Your Menu**.
2. Read the instructions, then follow the prompts to enter your household size, income, and assets, and then review and submit your application. Please remember to list all household members' information on the last page of the application.

Your application will be reviewed by the Financial Counseling department. For more information on Financial Assistance, go to [Financial Assistance and Credit and Collection Policy - UMass Memorial Medical Center - UMass Memorial Health \(ummhealth.org\)](#)

View Claims

You can view claims for services you've received under a given insurance coverage from the Claims page in myChart.

1. Select **Coverage Details** from **Your Menu**.
2. Select your name under the respective Member coverage details
3. You will be presented with **Eligibility**, but you can toggle between that tab and the tabs for **Claims** and **Referrals**.

If you have a question regarding the claim, select **CUSTOMER SERVICE REQUEST** from this billing page to send a message to financial customer service staff.

Request a Referral

An insurance referral is an approval from your PCP (Primary Care Provider) and health plan to get certain medical services or specialty care. Many HMOs (Health Maintenance Organizations) require an insurance referral prior to the patient seeking treatment.

UMass Memorial Health has a centralized team that will work to secure your insurance referral if you have a UMass Memorial PCP (Primary Care Provider) and are seeing a UMass Memorial Specialist. This can be used for patients who have a UMass Memorial PCP (Primary Care Provider) and need an insurance referral with a **non-UMass Memorial Specialist**.

You can access the UMMH myChart Insurance Referral Request form from the myChart menu, or by using the Messaging feature.

Complete the requested information on the form, select **[Submit Request]**, and the referrals team will review your request within three business days.

View Benefits Summary

You can quickly see your benefit summary from a particular visit within billing details. This will now allow you to view the following:

- The amount billed to the insurance
- The amount covered by the insurance company
- Your remaining balance

The remaining responsibility will be further broken down into copay, deductible, coinsurance, and the amount that was not covered.

Resources

myChart contains other useful resources, in addition to providing access to your health information.

Medical Library

Select **Search Medical Library** from **Your Menu** to search the online health reference library. In order to learn more information about medications, procedures, conditions, and more, simply type in search term(s) and select [**Lexicomp search**]. Your search results will open in a new browser tab.

Research Studies

As an academic medical center, UMMH is involved in cutting-edge research and clinical trials to help improve medical innovations of our future. If you are interested in participating in research studies at UMMH, you can set your myChart contact preferences by selecting **Research Studies** from **Your Menu**. If you are enrolled in any research studies, you will be able to access information about them from this section.

myChart Learning Library

Patient Facing videos are embedded throughout myChart to give you an overview or guided walk through specific features and topics within myChart. Below are some examples.

The New myChart Experience: This Video will give you a tour of the redesigned look of the myChart Homepage. This video can be found at the bottom of the homepage.

myChart Connect Accounts: Explains how Happy Together works. This video appears on the Link My Accounts page.

myChart Sharing Your Record: This video covers Share Everywhere and proxy access and appears on the Share My Record page.

Share Everywhere: This video includes only the Share Everywhere content from the MyChart: Sharing Your Record video and appears on the Share Everywhere page.

Your Health Record on the Go: This discusses interoperability and provides a more in-depth overview of how patient data is shared. This appears on the Share my Record Page.

GetWell Loop

GetWell Loop is an online care communication platform utilized by UMMH for patients who undergo certain procedures, like joint replacement surgery. You can access your GetWell Loop account via myChart, which helps to ensure daily, personal support, patient education and post-surgical pathway reinforcement.

Please note: GetWell Loop does not work via myChart Mobile app.

[Return to the top of the document](#)

myChart Tools and Other Links

Easy access to other useful myChart guides and tools are available for you from **Your Menu**. Your myChart Menu also provides access to external links that can provide even further information for you while you are logged in and accessing your health information, such as educational videos, privacy information, and tips and tricks for making your hospital stay more comfortable.

Preferences and Settings

myChart allows you as a user to set some preferences specific to you, whether you are logged into the web version or the mobile version. These **ACCOUNT SETTINGS** activities on **Your Menu** will differ slightly between the web version and the mobile version.

Change your myChart password

To ensure that your medical information stays protected, consider changing your myChart password periodically.

- From the web application, select **Security Settings** from **Your Menu**. Enter your current password, then enter your new password twice.
- From the mobile application, select **[Account Settings]** from the **[Switch Patients]** icon in the top right.

Two-Step Verification

As an added security feature, UMMH enables Two-Step Verification for logins from new/different locations. If you do not want this extra security, you can turn off from **Security Settings** from **Your Menu** and then **[Turn on/off two-step verification]**.

When setting up, you'll be asked to Verify Your Identity to ensure the code is sent to the correct email or phone.

After entering your email/phone and selecting **[Continue]**, you will select **[Send to my email]** or **[Text to my phone]**.

Enter the security code you received from your email or text into the **[*Enter Code]** field, then select **[Next]**. Two-step verification is now turned on.

You can also now use an authenticator app, such as Google Authenticator or the native iOS authenticator, as the two-factor authentication method for MyChart.

Change or Add your own Photograph

You may already see a headshot photograph of yourself in your myChart if you had your photograph taken at an office visit. You can now update that picture or add one if one has not been taken.

1. Select **Personalize** from **Your Menu** and then select the **[Edit]** button.
2. Before adding a photograph, read the Photograph **Requirements** and **Tips for taking a High-Quality Photograph** displayed on the page.
3. Select the pencil at the top right of your headshot to continue and add your photograph.
4. You will now have to navigate to where (on your device) you have saved a profile photograph of yourself. Select the picture/photograph and Select **[Open]**.

This photograph will be reviewed during your next check-in and applied as your profile picture, if deemed appropriate. If not, you will continue to see the photo in your myChart account.

5. Select [**Accept**]. Your photograph is now awaiting confirmation at your next in person appointment.

Other Preferences

You can update your preferences for scheduling and Visit Record settings in the **Other Preferences** section of **Your Menu**.

Visit Record allows you to see attribution information (such as author and entry time) for elements in your After Visit Summaries.


To update this, go to Other Prefences and choose your option from the drop down box.

Change your Shortcuts

You have six (6) Shortcuts to your most commonly used activities. The Default Shortcuts will be: **[Schedule an Appointment], [Visits], [Test Results], [Medications] and [Billing Summary]**.

You can change these to other activities, if these do not work as your most common activities. To change your personal Shortcuts, select **Change Your Shortcuts** from the Account Settings submenu on **Your Menu**.

Select the existing shortcut. **Your Menu** will appear, and you can then pick a different activity.

Those with a  are already selected as one of your Shortcuts.

The selected activity will then become your new shortcut.

Change your Notifications

To cater when and how you receive notifications from UMMH, you can change your specific settings to best suit your needs. To do so, Select **Communication Preferences** from **Your Menu**.

Various notifications are organized by activities; Appointments, Messages, Health, Billing, Questionnaires, Account Management. Each section can be expanded (and contracted) by selecting the Up/Down carrot to visit each of the settings within.

myChart email notifications will now also send you a PUSH notification, if you are using the myChart Mobile application. UMMH enables the activity, but you control whether you would like to keep this enabled on your personal device.

Download the myChart Mobile Application

If you setup your account from a web browser, you can then download the MyChart application from iTunes or the Android Play Store and access the mobile application from your personal device; iPhone or iPad, Android phone or Android tablet.

1. From the Play Store or iTunes, enter **MyChart** in the search field. Find and select the MyChart icon (a red folder with a white heart in the middle).
2. Open the newly loaded MyChart application and read/accept the terms. When prompted to allow the application to access your location, select YES so that you can see all the Epic healthcare organizations near you (else you will have to search through all 50 states). Find and select the UMass Memorial Health logo.
3. You are now ready to login and begin using your MyChart mobile application.

MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go.



UMMH recommends setting either a fingerprint or passcode with the mobile application on your smartphone for ease of access and added security.

- For Apple users to continue receiving updates to the MyChart app, patients must ensure their device is running iOS 16.2 or later and/or WatchOS 9.0 or later. The following devices will not be able to meet these new requirements: iPhone 7 / 7 Plus, iPhone 6s / 6s Plus, iPhone SE (gen 1), Apple Watch Series 3.
- For Android user, version 9 is now the minimum OS for Android phones

The myChart mobile application will display in the language you have your phone set to, if that language is available from UMMH.