MYIO Patient Portal Guide Version 3.0

Welcome to MYIO, your patient experience portal! MYIO is a secure and easy way for you to enter or update your account information, view and request appointments, pay your bill online, sign documents and fill out forms, and communicate with your provider and practice. You may access MYIO either through an app on your mobile device, or through a desktop version on your browser.

The features available to you depend on what your provider has activated in MYIO, so you may not see all the functionality listed in this guide.

MYIO is a web-based application that allows for the encrypted, bi-directional transmission and storage of electronic data. In other words, you have instant access to documents and information wherever and whenever you want. A portal is a place where files can be uploaded, downloaded, stored and shared in a safe and secure environment — 24/7.

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Getting Started

IN MOBILE (phone or tablet) APP

If you have a current portal account
download MYIO app on Google Play and/or the App Store, use existing username and password. If you are having trouble, contact your practice to reset your password.
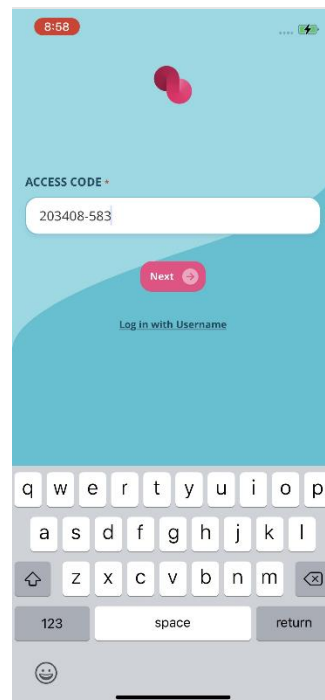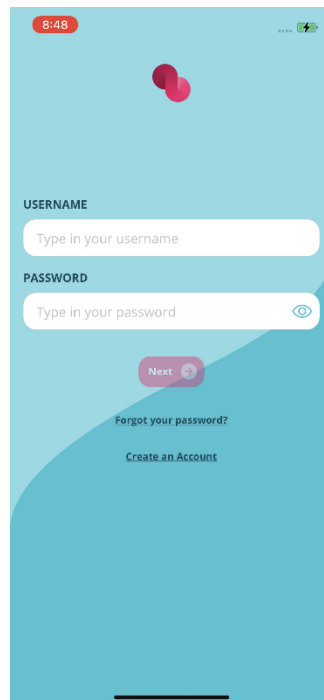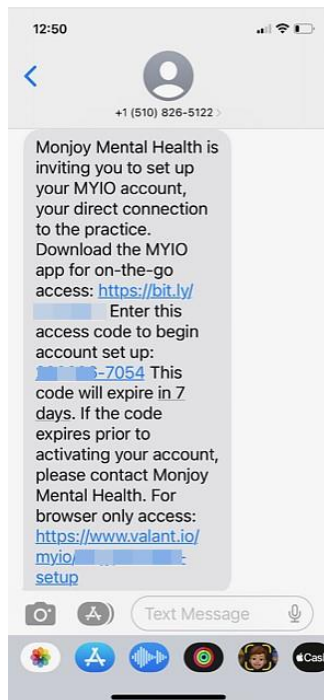
If you need a portal account and are an existing or new patient
download MYIO app from the Google Play or Apple App Store, tap on "Create Account" and enter the access code found in your Invite to MYIO email/text. If you did not receive an invite contact your practice and they can send you one!

Click "Create an Account" and enter the access code from the text message to get started. The access code will expire after seven days.

Sample text message

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Verify identity using birthdate validation

After successfully entering your birthdate and clicking next, you will see the "Tell us about yourself" screen, where you will be prompted to enter your personal information. If you log out before entering Personal Details and Email Addresses, and do not remember your password to re-enter MYIO, you can work with the practice to regain access to your account.

If you have a current portal account
navigate to practice portal URL, enter existing username and password. If you are having trouble, contact your practice to reset your password.
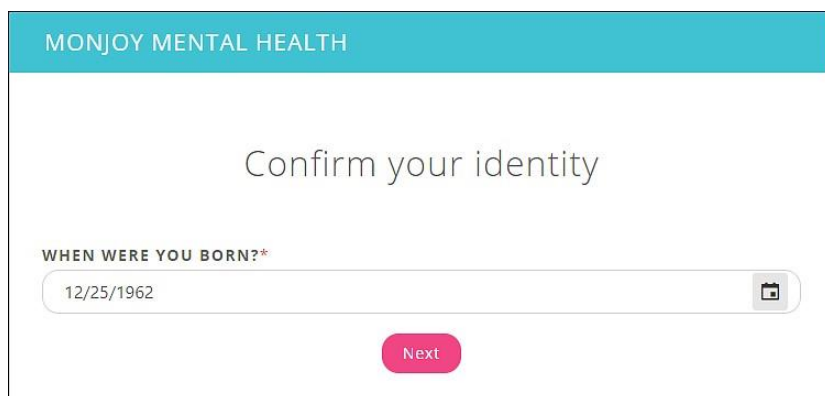
If you need a portal account and are an existing or new patient
navigate to practice portal URL, click on "Create Account" and enter the access code found in your Invite to MYIO email/text. If you did not receive an invite, contact your practice and they can send you one!

Click "Create an Account" and enter the access code from the email to get started. The access code will expire after seven days.

Sample email
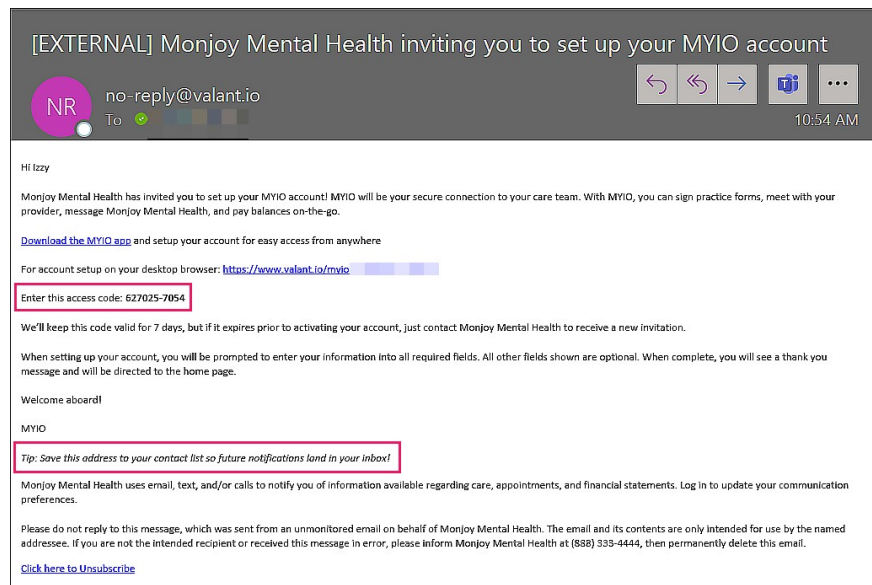
If you are using a browser, the practice name will be displayed at the top of the screen. The browser URL is unique to each practice.

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Verify identity using birthdate validation
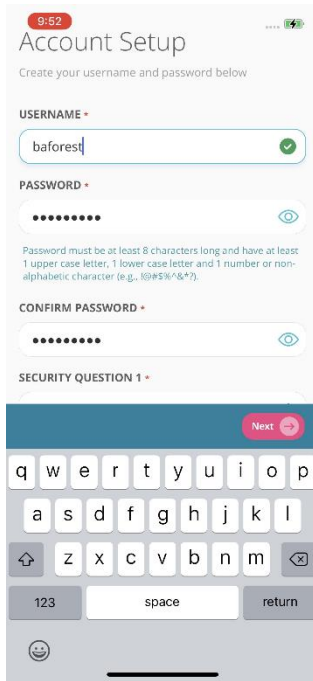

After successfully entering your birthdate and clicking next, you will see the "Tell us about yourself" screen, where you will be prompted to enter your personal information. If you log out before entering Personal Details and Email Addresses, and do not remember your password to re-enter MYIO, you can work with the practice to regain access to your account.
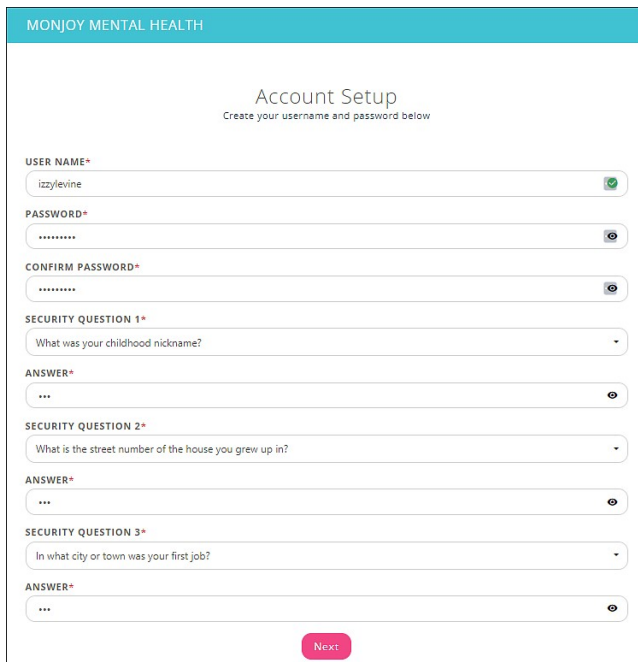
Account Setup

IN MOBILE (phone or tablet) APP

- Choose username
- Choose password – eight or more characters, one uppercase, one lowercase, one number or special character
- Retype password
- Answer three security questions
- Click Next

Please note: If you are using the mobile app, your MYIO username and password will not be saved, you will need to manually enter them every time you log in.

IN BROWSER

- Choose username
- Choose password – eight or more characters, one uppercase, one lowercase, one number or special character
- Retype password
- Answer three security questions
- Click Next

Please note: If you are using the mobile app, your MYIO username and password will not be saved, you will need to manually enter them every time you log in.

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Onboarding for New Patients

IN MOBILE (phone or tablet) APP

Enter personal details (* required fields)

Click next after each question is answered:

- First Name*
- Middle Initial
- Last Name*
- Suffix
- Preferred Name
- Preferred Pronouns
- Gender Identity
- Sex as matching your insurance policy
- SSN
- Marital Status

Enter personal details (* required fields)

Click next after each question is answered:
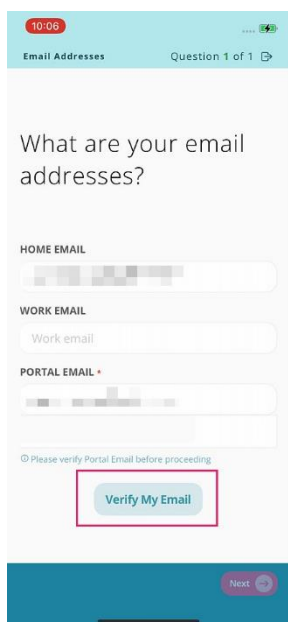
- Race and Ethnicity
- Preferred Language
- Education Level

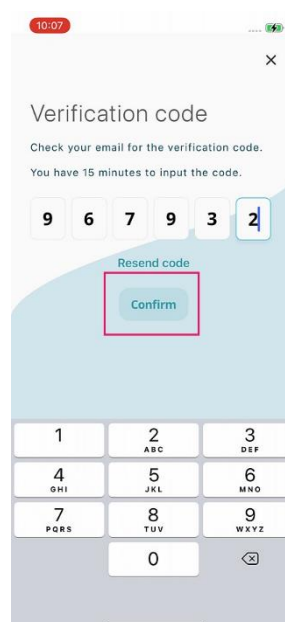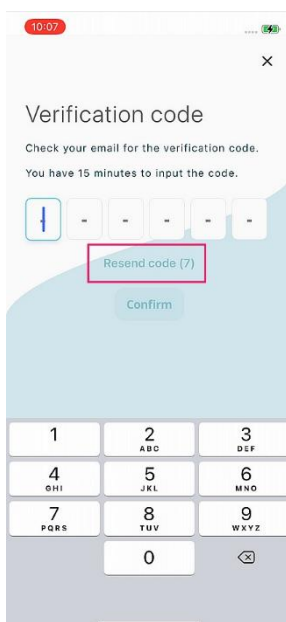**Enter Portal Email Address and Emergency Contact Information**

Please do not log out until this step is complete. Having an email address on file is an important part of MYIO account security.

The portal email can be the same as the home or work email. The portal email is used to reset your MYIO password or receive any communication regarding updates, messages, or shared documents available in your MYIO account.

Enter email information   **Enter portal email verification code, click Confirm**

Click "Verify My Email" to receive code via email.

If you did not receive a verification code, wait 15 seconds before requesting a new code. A resend code link will become available after the countdown.

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Enter Address and Preferred Contact Information

Click next after each question is answered

App users may update information once the onboarding information is completed. You will see any updates made to your account once the practice verifies them.

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Enter Insurance Information
(dependent on practice settings)

Enter Credit Card Information
(dependent on practice settings)

Be sure to scroll down to fill out completely.

The credit card information will show under "Billing" once initial account information is completed

Accept Terms of Use

Review the linked information and click Accept"

Enter personal details (* required fields)

Personal Details 1

FIRST NAME*   M.I
Isabel   Type here

LAST NAME*
Levine

SUFFIX
Type here

PREFERRED NAME
Izzy

PREFERRED PRONOUNS
She/Her   ▼
You can choose one or type in your own

GENDER IDENTITY
Female   ▼

SEX AS MATCHING YOUR INSURANCE POLICY*   ⓘ Why is this relevant?
Female   ▼

⊕ Back   Next ⊕

- First Name*
- Middle Initial
- Last Name*
- Suffix
- Preferred Name
- Preferred Pronouns
- Gender Identity
- Sex as matching your insurance policy

Personal Details 2

SOCIAL SECURITY NUMBER

MARITAL STATUS   ⓘ Why is this relevant?
Divorced   ▼

ETHNICITY   ⓘ Why is this relevant?
Not Hispanic Or Latino   ▼

PREFERRED LANGUAGE
English   ▼

EDUCATION LEVEL   ⓘ Why is this relevant?
Some College Or Associate Degree   ▼

RACE   ⓘ Why is this relevant?
Choose 'Declined to specify' only if you would rather not specify race. Any other selected option
will be ignored if 'Declined to specify' is selected.
Select items   ▼
You can pick more than one.

⊕ Back   Next ⊕

Scroll down until each field is filled:
- Social Security Number
- Marital Status
- Ethnicity
- Preferred Language
- Education Level
- Race
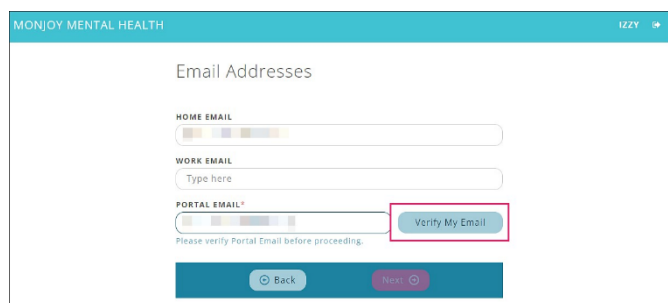
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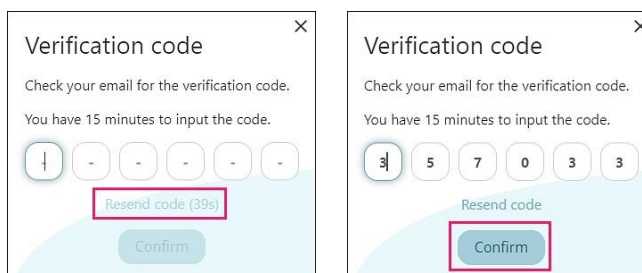**Enter Portal Email Address and Emergency Contact Information**

Please do not log out until this step is complete. Having an email address on file is an important part of MYIO account security.

The portal email can be the same as the home or work email. The portal email is used to reset your MYIO password or receive any communication regarding updates, messages, or shared documents available in your MYIO account.
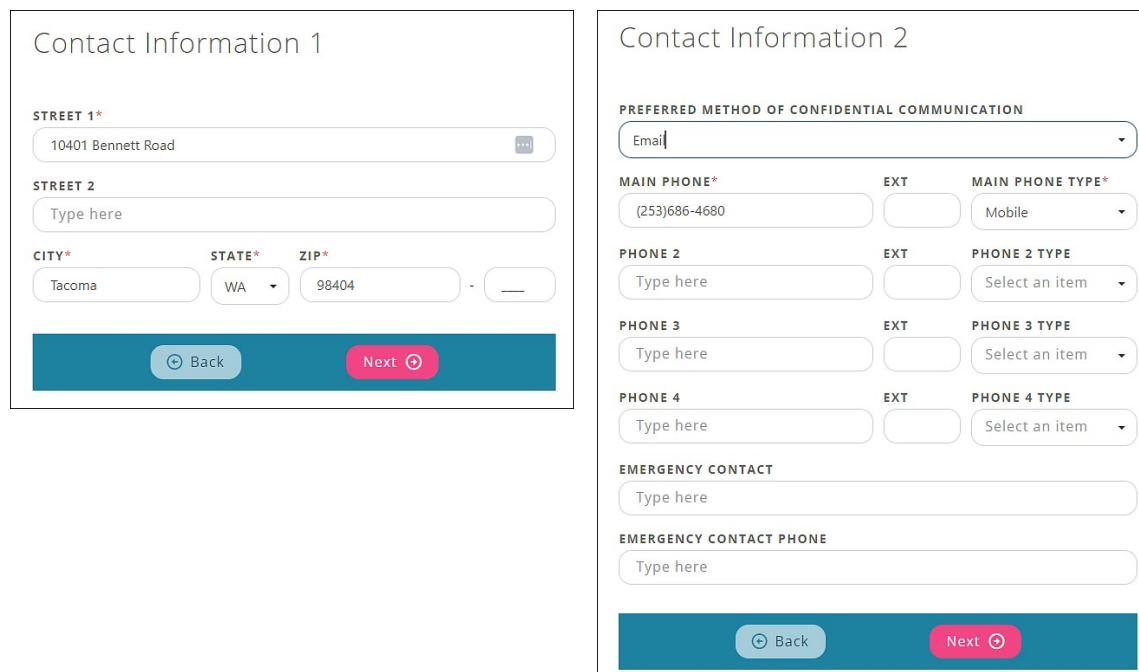
Enter email information   **Enter portal email verification code, click Confirm**

Click "Verify My Email" to receive code via email.

If you did not receive a verification code, wait 60 seconds before requesting a new code. The resend code link will become available after the countdown.

Fill out Address and Preferred Contact Information fields.

Browser users may use the back button to update previously entered information during the onboarding process.

You will see any updates made to your account once the practice verifies them.

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Enter Insurance Information
(dependent on practice settings)

Enter Credit Card Information
(dependent on practice settings)

The credit card information will show under "Billing" once initial account information is completed.

Accept Terms of Use

Review the linked information and click Accept"

Managing Your Care with MYIO

IN MOBILE (phone or tablet) APP
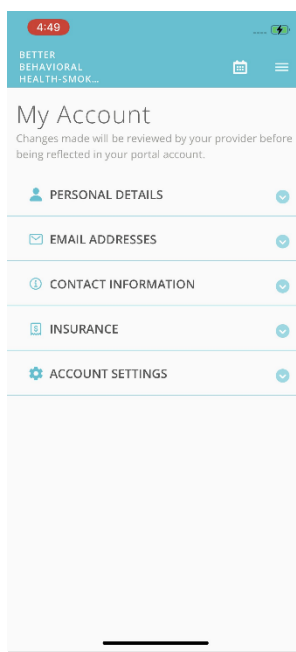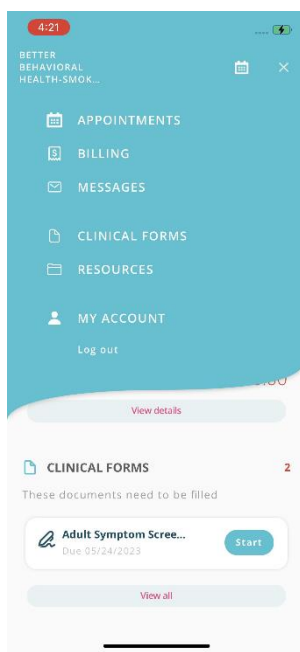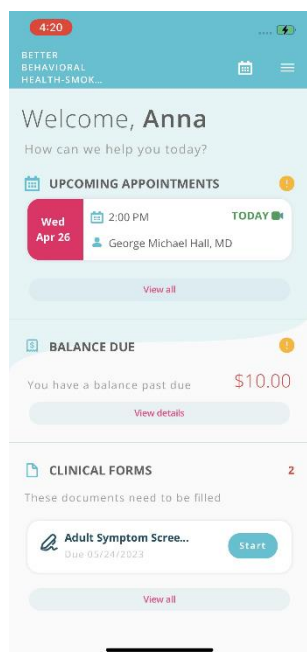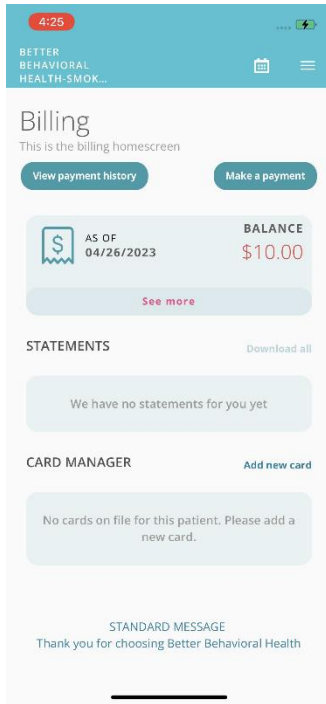

Welcome Screen
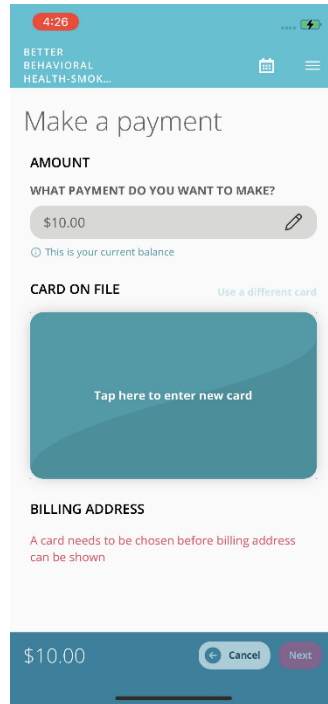To see all features, click on the three horizontal lines.

My Account
To view and edit personal details, contact information, insurance information, click on "My Account" in the top right menu of the app.

Billing

If Card Manager View is enabled

If Online Pay is enabled

To view or pay your balance, and to enter credit card information, click on "Billing" in the top right menu in the app. You can also click "View details" under the "Balance Due" header on the welcome screen.

To make a payment, click "Make a payment" and select the amount you wish to pay.

Please note, the "Card Manager" and "Make a payment" options will only be available if your provider has activated the credit card online pay function.
The "Card Manager" gives you the ability to save your card on file with the practice.

Selecting "Make a payment" allows you to enter a card for payment or use a saved card. Once the payment is submitted, the Online Payment amount will show as pending (yellow). When the practice has posted the payment, it will show as applied (green) and the balance amount will adjust.

After entering a card payment, the screen will show waiting for bank confirmation (yellow), then a success (green) screen.

The Billing screen will show Pending (yellow), and when the practice posts the payment will show Paid (green).

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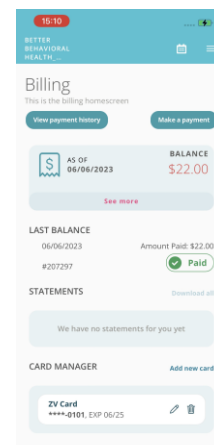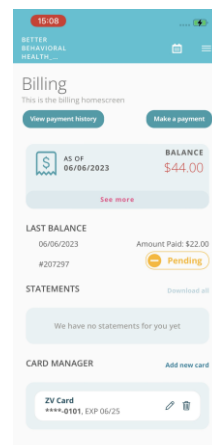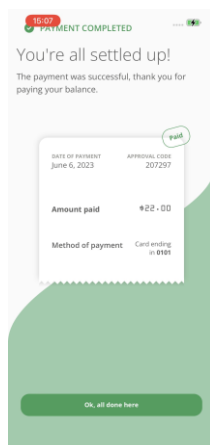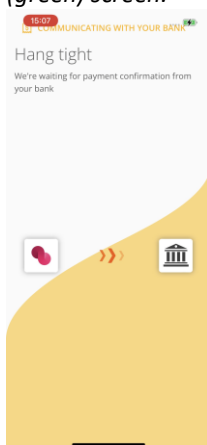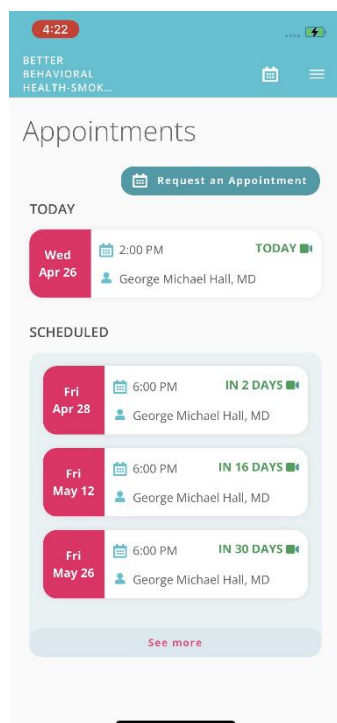
Appointments

To view, check in, or request appointments, click on "View All" from the welcome screen, the calendar icon, or on "Appointments" in the top right menu in the app. Self-check-in and appointment requests are enabled or disabled by your practice.

Check In

Camera icon – telehealth appointment. If the camera icon is present, you will be prompted to join a telehealth session. If the session is a group telehealth appointment, there will be a group icon visible instead of the camera icon.

Request an Appointment (if enabled)

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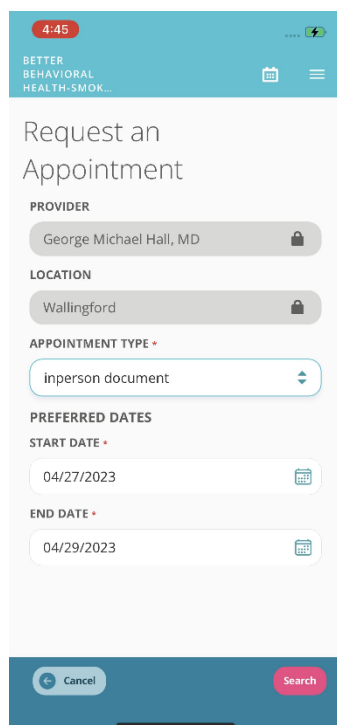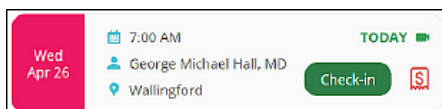
Telehealth

Log into MYIO and Check In for your appointment
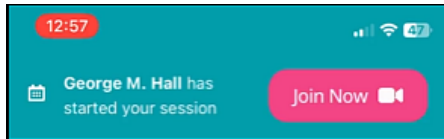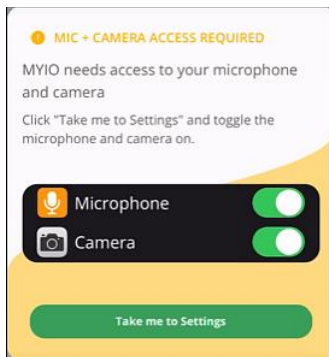
 Dollar sign – payment due prior to the appointment. If the dollar sign icon is present, you will be prompted to enter card details for payment.

Once the provider has started the session, you will see a Join Now button to click. If this is a Group telehealth session wait for the Provider to admit you into the session.


Make sure the Microphone and Camera access is toggled on.

- Default view is camera off and microphone muted
- Default audio is device audio settings
- Go to settings and adjust if disallowed in initial prompt

View options – Speaker (default, one attendee highlighted), Gallery (all participants displayed in grid view), Hide Self View

- There may be more than one screen if Gallery View is selected in a group session – swipe to switch between screens
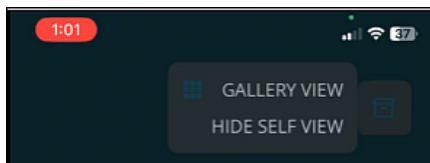
- If the session includes screen or whiteboard sharing, mobile app users will be able to view the screen or whiteboard but are not able to share their screen or contribute to the whiteboard from their device.

If you navigate away from the session, you will see this warning
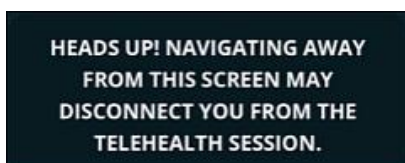
Icons on bottom of the screen:

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- Microphone – when clicked, microphone is off (diagonal line through icon)
- Camera – when clicked, camera is off (diagonal line through icon); self-facing camera only
- Chat – separate view opens when clicked
  - Private (to provider) or to Everyone

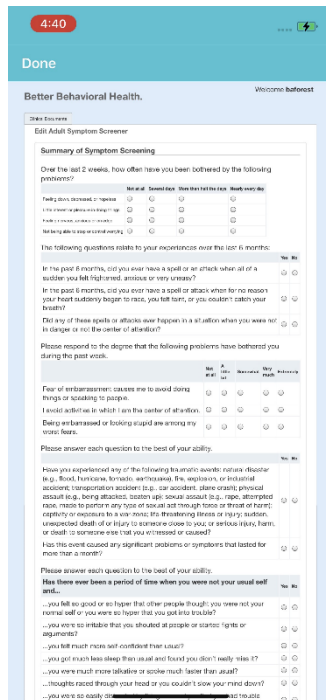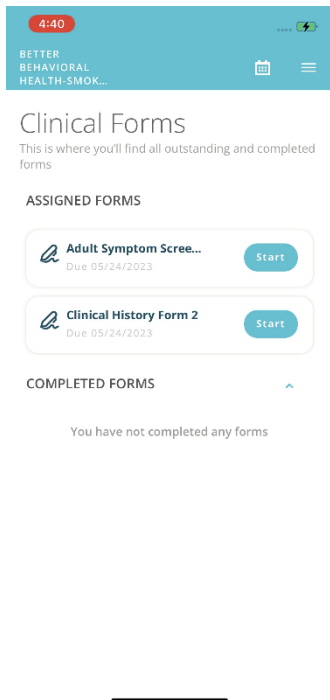- Participants – shows number of people in the session; when clicked, displays names of participants
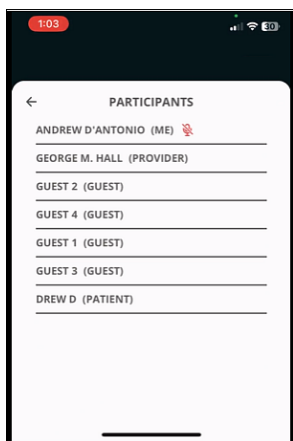
- Leave

Clinical Forms

To view and complete clinical forms online, click "View All", then click "Start" to complete.

There are two types of clinical forms: Assessments, and eSignature packets.

- Assessments: You have unlimited time to complete the assessment as long as you are actively filling out the form by scrolling, tapping or typing. The app allows five minutes of inactivity before it closes and logs you out.

- eSignature Packet: You have five minutes to sign the document(s) in the packet which opens in a Dropbox Sign window. You may experience a little wait time while those documents are loading.
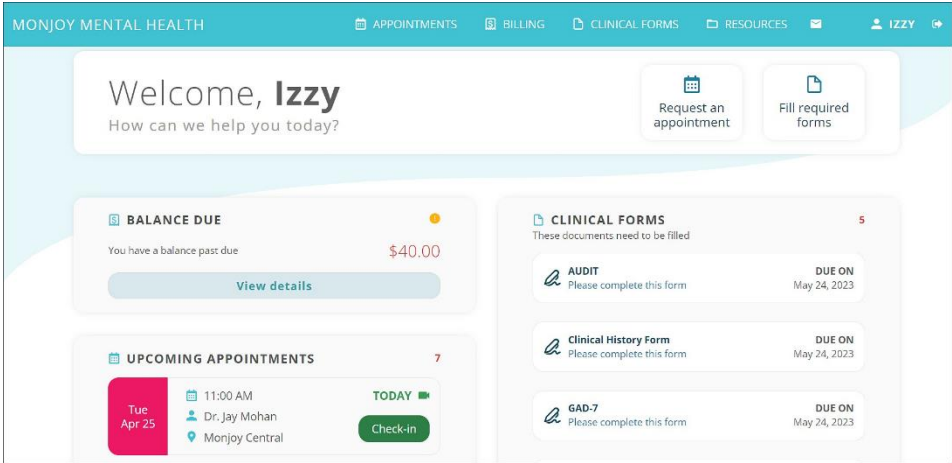
Resources

The documents in this section are populated by your practice. Click on the document to download it.
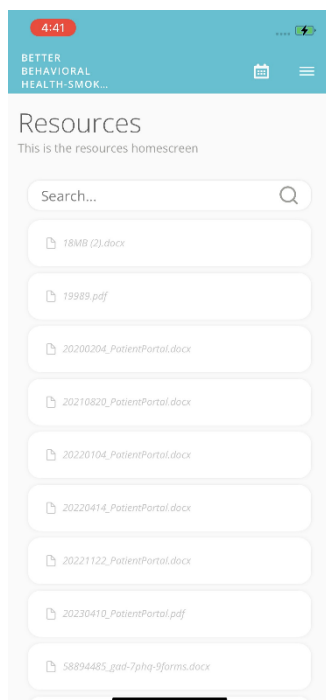
IN BROWSER

Welcome Screen

If using a browser, full screen at 100% zoom is the recommended view.

In the top bar, you can click on the practice name to return to the welcome screen.

Depending on what your practice has enabled, you may also see links for appointments, billing, clinical forms, and resources. The envelope icon will take you to your secure messages.

Clicking the arrow icon will log you out of MYIO.

My Account

To view and edit personal details, contact information, insurance information, click your name in the top right of the browser.

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Billing

To view or pay your balance, and to enter credit card information, click on "Billing" in the top right menu in the app, or click "Billing" on the banner. You can also click "View details" under the "Balance Due" header on the welcome screen.

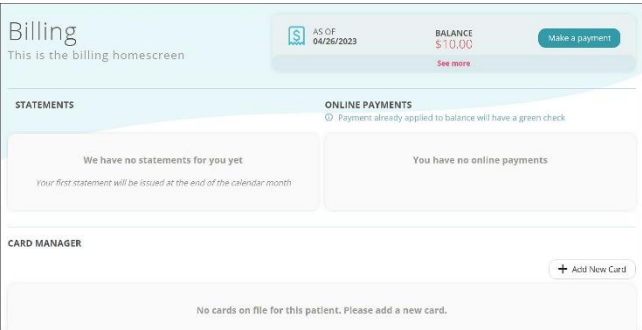To make a payment, click "Make a payment" and select the amount you wish to pay.
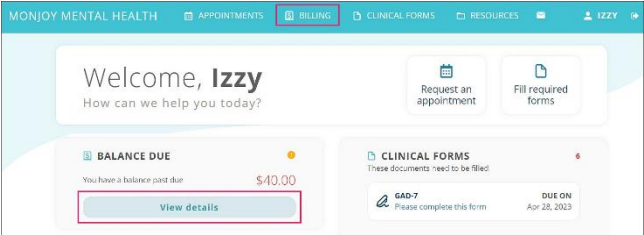
Please note, the "Card Manager" and "Make a payment" options will only be available if your provider has activated the credit card online pay function.
The "Card Manager" gives you the ability to save your card on file with the practice.
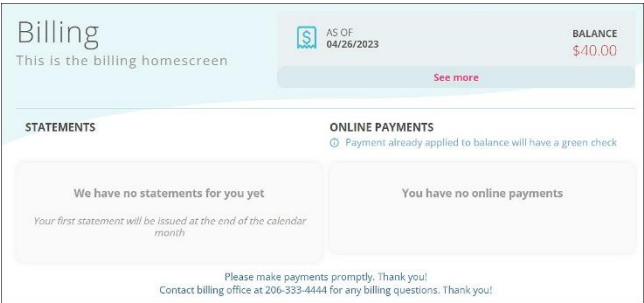
*Clicking "See more" opens date ranges of charges due*

If Online Pay is enabled

Selecting "Make a payment" allows you to enter a card for payment or use a saved card. Once the payment is submitted, the Online Payment amount will show as pending (yellow). When the practice has posted the payment, it will show as applied (green) and the balance amount will adjust.
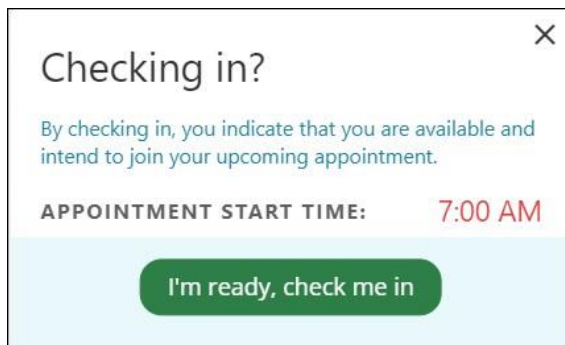
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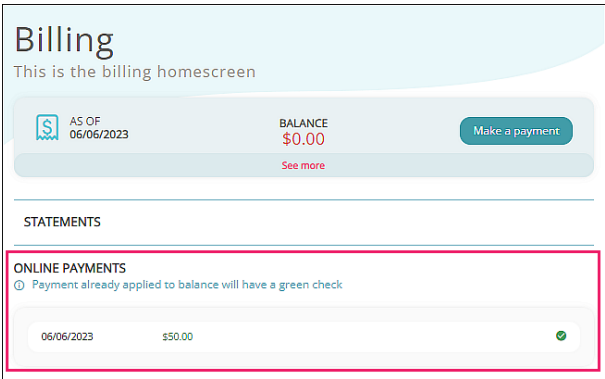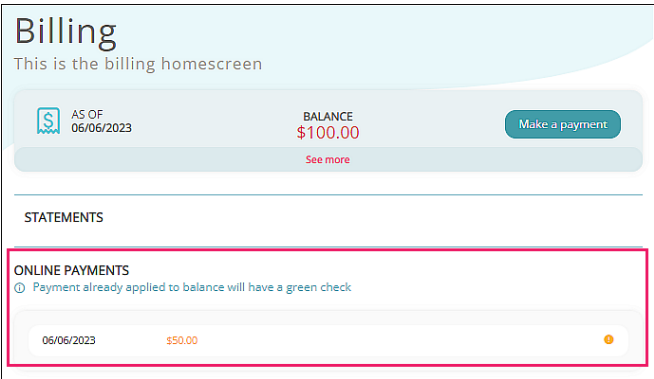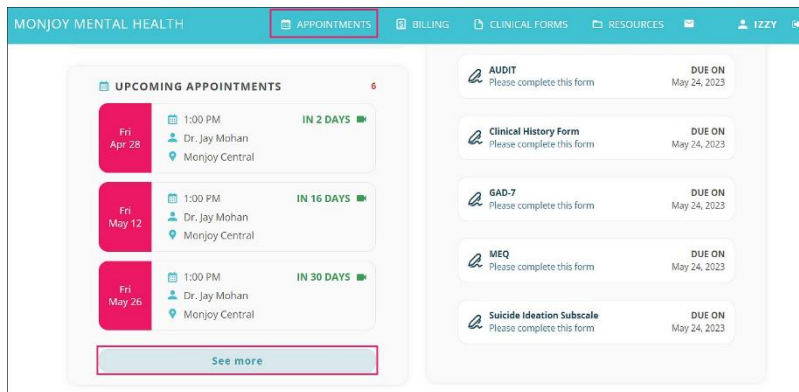
Appointments

To view, check in to, and request appointments, click "Appointments" on the top banner. You can also click "See more" under "Upcoming Appointments" on the welcome screen.

Self-check-in and appointment requests are enabled or disabled by your practice.

Check In *(if enabled)*

Camera icon – telehealth appointment. If the camera icon is present, you will be prompted to join a telehealth session. If the session is a group telehealth appointment, there will be a group icon visible instead of the camera icon.

Dollar sign – payment due prior to the appointment. If the dollar sign icon is present, you will be prompted to enter card details for payment.

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Request an Appointment *(if enabled)*

Once a request is submitted, a banner will appear indicating the appointment is not confirmed until you hear back from the practice.

Telehealth

Log into your MYIO portal account.

Supported browsers are Google Chrome, Mozilla Firefox, and Microsoft Edge. If you are accessing MYIO in a different browser, there will be an error banner, and the telehealth session will not be available.
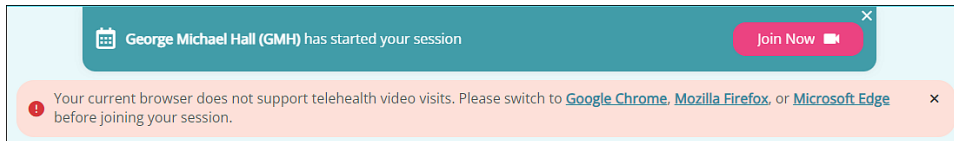

Check In for the appointment.

 Dollar sign – payment due prior to the appointment. If the dollar sign icon is present, you will be prompted to enter card details for payment.

The provider will receive notification of your check in and will initiate telehealth.

Click the Join Now button (If Group session, wait for provider to admit).

Allow use of camera and microphone in the window that pops up.
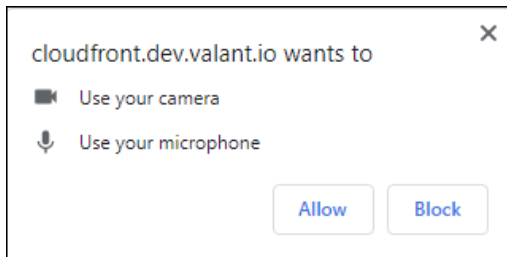
- Default view is camera off and microphone muted
- Default audio is device audio settings
- Go to settings and adjust if disallowed in initial prompt

View options – Speaker (one attendee highlighted), Gallery (all participants displayed in grid view)

- There may be more than one screen if Gallery View is selected in a group session
- You will be able to share your screen and contribute to a whiteboard if the provider uses these options in the session
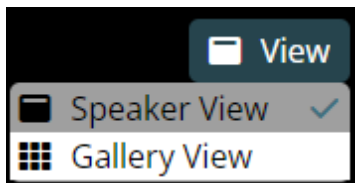

 Eye icon top right of screen - hides self-view when clicked

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Buttons on bottom bar:
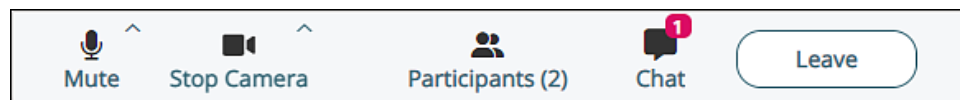
- Mute – when clicked, microphone is off (diagonal line through icon)
- Stop Camera – when clicked, camera is off (diagonal line through icon)
- Participants – shows number of people in the session; when clicked, displays names of participants
- Chat – separate view opens when clicked
  - Private (to provider) or to Everyone
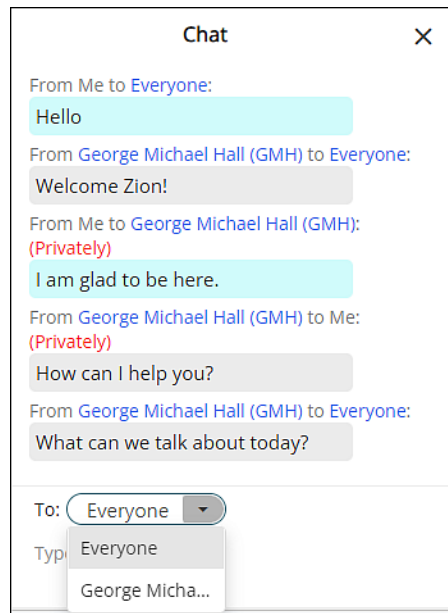
- Leave – click to exit the telehealth session

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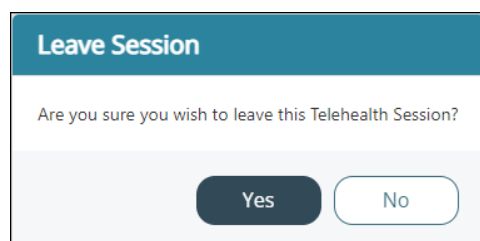
Clinical Forms

To view and complete clinical forms online, click "Clinical Forms" on the top banner or "Fill required forms".

Click "Start" to complete.

There are two types of clinical forms: Assessments, and eSignature packets.

- Assessments: You have unlimited time to complete the assessment as long as you are actively filling out the form by scrolling, clicking or typing. MYIO will log you out after 60 minutes of browser inactivity.
- eSignature Packet: You have five minutes to sign the document(s) in the packet which opens in a Dropbox Sign window. You may experience a little wait time while those documents are loading.

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Secure Messages

To view, reply to, compose, and add attachments to messages to your provider, click the envelope icon in the top banner.

MONJOY MENTAL HEALTH 📅 APPOINTMENTS 🅢 BILLING 🗋 CLINICAL FORMS 🗂 RESOURCES ✉ 👤 IZZY ↪
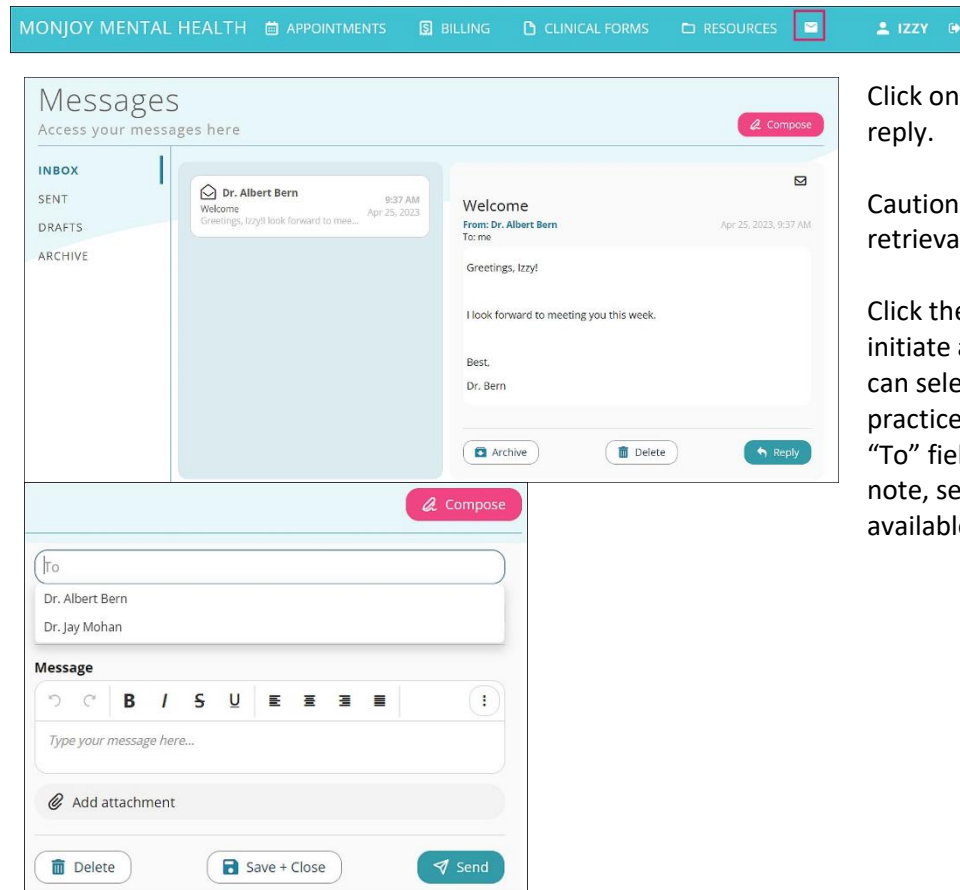
Click on a message to see contents and reply.

Caution: Deleted messages are not retrievable.

Click the pink "Compose" button to initiate a secure message. Then, you can select recipients (chosen by the practice) from the drop-down list in the "To" field and add attachments. Please note, secure messaging is only available if your practice has enabled it.

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Troubleshooting

Resetting Password

There is a "Forgot password" link on both the browser and mobile app login page once you have verified your portal email.

- When clicked, you will be prompted to enter your username and the portal email address associated with your account.
- You will receive an email that will provide a link to reset your password. If this fails, your practice is able to manually reset your password.

You may also change your password:

- In mobile device app – click your name in the top right corner, select "Account Settings", select "Change Password"
- In browser – click menu (three lines in top right corner), select "My Account", select "Account Settings" select "Change Password"

If you are using the MYIO app: Make sure your application is running the most recent version. Check the app store and see if there is an update available. If issues persist, delete the app and re-install it on your device. If the app is 'freezing', try force-closing the app and reopening it.

If you are using MYIO in your internet browser, make sure you have the latest updates. Try refreshing the page.

Contact the practice if any of the above troubleshooting steps fail.

Supported Devices and Operating Systems

Mobile devices must be able to update to the latest iOS or Android operating system.

Supported Browsers: Google Chrome, Microsoft Edge, Mozilla Firefox. MYIO is not enabled with Safari.

Please note older operating systems do not allow updated apps to perform as desired.

Timeout Cautions

MYIO Mobile App: 5-minute idle timeout

MYIO Browser: 60-minute idle timeout

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