

MYIO Patient Portal Guide



Welcome to MYIO, your patient 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.

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

If you have a current portal account



APP: download MYIO app on [Google Play](#) and/or the [App Store](#), use existing username and password



BROWSER: navigate to practice portal URL, enter existing username and password

If you need a portal account and are an existing or new patient



APP: download MYIO app on [Google Play](#) and the [App Store](#), need access code from the practice to “Create Account”



BROWSER: navigate to practice portal URL, enter last name associated with account, need access code from the practice

Sample email with access code:

Subject Line: [Practice Name] inviting you to set up your MYIO account

Hi [Patient First Name],

[Practice Name] has invited you to set up your MYIO account! MYIO will be your secure connection to your care team. With MYIO, you can sign practice forms, meet with [Provider Name], message [Practice Name], and pay balances on-the-go.

Download the MYIO app and set up your account for easy access from anywhere.

For account setup on your desktop browser: [link to practice's MYIO url]

Enter this access code: [access code]

We'll keep this code valid for 7 days, but if it expires prior to activating your account, just contact [Practice Name] to receive a new invitation.

When setting up your account, you will be prompted to enter your information into all required fields. All other fields shown are optional. When complete, you will see a thank you message and will be directed to the home page.

Welcome aboard!

MYIO

Tip: Save this address to your contact list so future notifications land in your inbox!

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Boilerplate Standard Message: [Practice Name] uses email, text, and/or calls to notify you of information available regarding care, appointments, and financial statements. Log in to update your communication preferences.

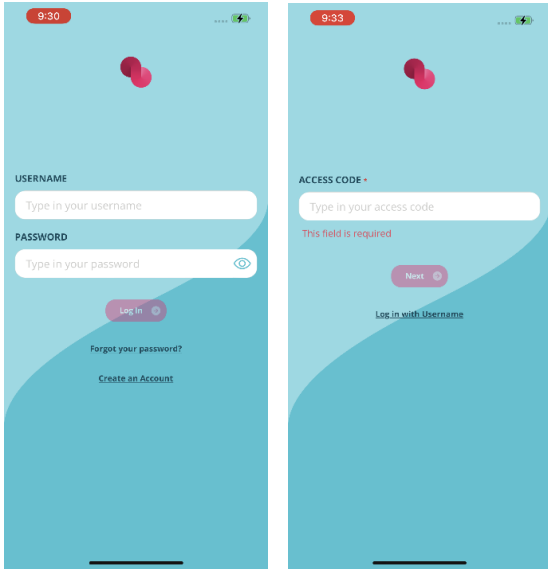
Please do not reply to this message, which was sent from an unmonitored email on behalf of [Practice Name]. The email and its contents are only intended for use by the named addressee. If you are not the intended recipient or received this message in error, please inform [Practice Name] at [Practice Number], then permanently delete this email.

Sample SMS text with access code:

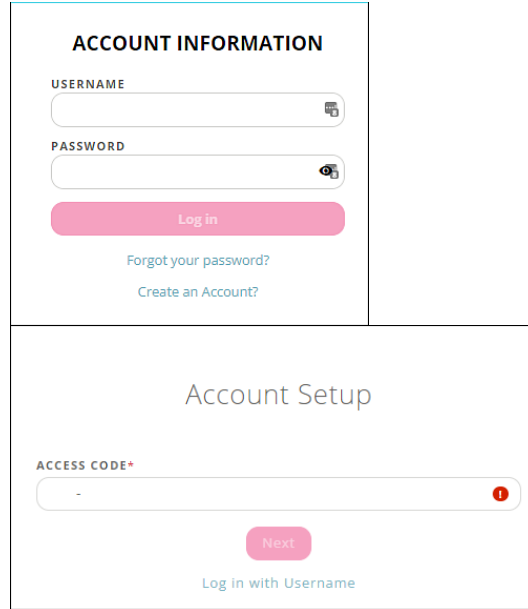
[Practice Name] is inviting you to set up your MYIO account, your direct connection to the practice. Download the MYIO app for on-the-go access: <https://bit.ly/3o05ah0> Enter this access code to begin account set up: [0123456789] This code will expire in 7 days. If the code expires prior to activating your account, please contact [Practice Name]. For browser only access: [Practice portal URL]

Click Create an Account and Enter access code to get started

APP view



BROWSER view

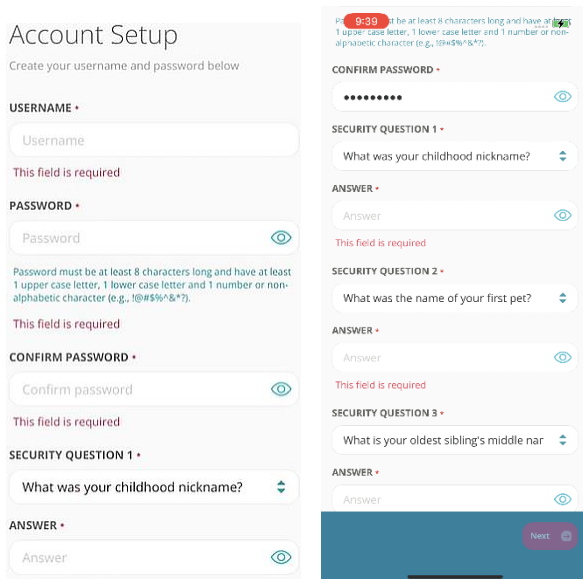


Click "Resend Code" if no access code received

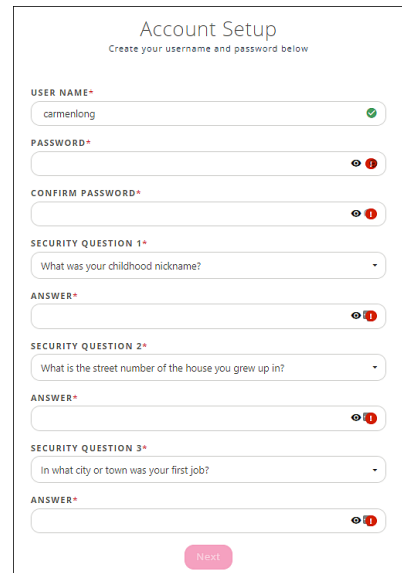
Set up your account

- 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

APP view



BROWSER view



APP users need to remember and manually enter username and password each time logging in

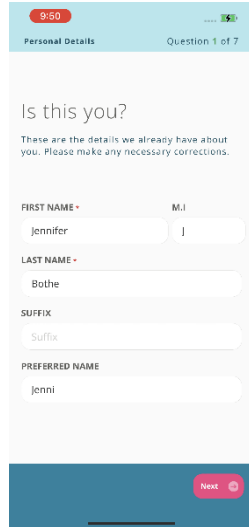
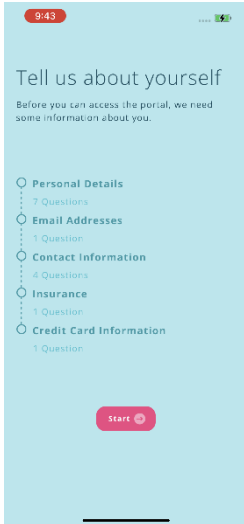
BROWSER users can utilize a browser keychain/password saver

Onboarding for New Patients

Enter personal details (*required fields)

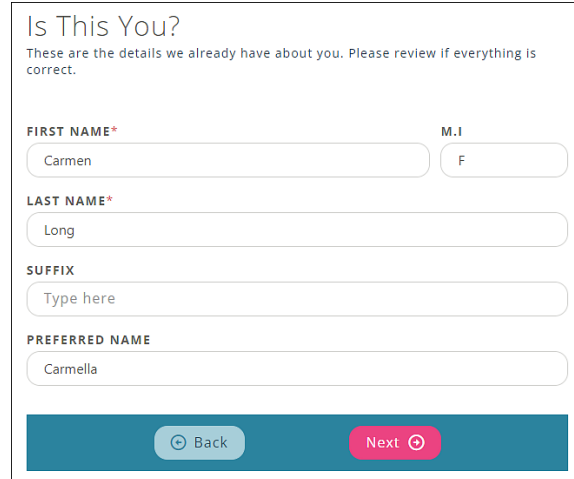
APP

- First Name*
- Middle Initial
- Last Name*
- Suffix
- Preferred Name



BROWSER

- First Name*
- Middle Initial
- Last Name*
- Suffix
- Preferred Name



APP: click next after each question is answered
Social Security Number **Birthdate***

Personal Details Question 2 of 7

9:52

What is your Social Security Number?

555-11-2222

Back Next

Personal Details Question 3 of 7

9:54

When were you born? *

01/12/2000

Back Next

Personal Details Question 4 of 7

9:55

What is your marital status?

Single

Why is this relevant?

Back Next

Personal Details Question 5 of 7

9:56

How would you define your race and ethnicity?

RACE
Select all that apply

ETHNICITY
None

Cancel Set

American Indian or Alaskan N...
Asian
Black or African American
Hispanic & Latino/Latina of Spanish, Mexi...

Personal Details Question 6 of 7

10:00

What language are you most fluent in?

None

Cancel Set

Arabic
Chinese
English
French
German
Hindi

Personal Details Question 7 of 7

10:01

What is your highest level of education?

None

Why is this relevant?

Cancel Set

2 years of college or higher postsecondary education
High school graduates, no college
Some college or associate degree
Bachelor's degree and higher
None

BROWSER: scroll down until each field is filled
Social Security Number
Birthdate*
Marital Status
Ethnicity
Preferred Language
Education Level
Race

Personal Details

SOCIAL SECURITY NUMBER

539-12-1212

BIRTHDATE*

7/2/1990

MARITAL STATUS Why is this relevant?

Married

ETHNICITY Why is this relevant?

Select an item

PREFERRED LANGUAGE

Select an item

EDUCATION LEVEL Why is this relevant?

Select an item

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

Enter Portal Email Address and Emergency Contact Information

APP

Enter email information

Click Verify My Email to receive code via email

The first screenshot shows a progress screen titled 'Next up' with the instruction 'Provide your email addresses'. A vertical list on the left shows the progress: Personal Details (1 question), Email Addresses (1 question), Contact Information (4 questions), Insurance (1 question), and Credit Card Information (1 question). A red 'Continue' button is at the bottom. The second screenshot is titled 'Email Addresses' and 'Question 1 of 1'. It asks 'What are your email addresses?' and has three input fields: 'HOME EMAIL' (with a 'Home email' placeholder), 'WORK EMAIL' (with a 'Work email' placeholder), and 'PORTAL EMAIL*' (with a 'Portal email' placeholder). A red asterisk and a note below the Portal Email field state: 'Please verify Portal Email before proceeding. This field is required'. A 'Verify My Email' button is at the bottom.

Enter portal email verification code, click Confirm

The screenshot shows a 'Verification code' screen with the instruction 'Check your email for the verification code. You have 15 minutes to input the code.' There are five empty boxes for the code, a 'Resend code' link, and a 'Confirm' button. A numeric keypad is visible at the bottom.

BROWSER

Fill out email and emergency contact information fields

Click Verify My Email to receive code via email

Main Phone Type should be mobile to receive SMS messages

The screenshot shows a 'Contact Information 3' form. It has four sections: 'HOME EMAIL' (input field), 'WORK EMAIL' (input field with 'Type here' placeholder), 'PORTAL EMAIL*' (input field with a 'Verify My Email' button to its right), and 'EMERGENCY CONTACT' (input field with 'Type here' placeholder). Below the Emergency Contact field is an 'EMERGENCY CONTACT PHONE' field with 'Type here' placeholder. At the bottom are 'Back' and 'Next' buttons.

Enter portal email verification code, click Confirm

The screenshot shows the 'Contact Information 3' form with a 'Verification code' modal overlay. The modal has the same instruction as the app version: 'Check your email for the verification code. You have 15 minutes to input the code.' It includes five input boxes, a 'Resend code (54s)' link, and a 'Confirm' button. The background form is partially visible, showing the 'Verify My Email' button and the 'EMERGENCY CONTACT' field.

Enter Address and Preferred Contact Information

APP

The app interface shows a sequence of four questions for entering contact information. The first two screenshots show the address and phone number entry. The third and fourth screenshots show the preferred method of confidential communication and emergency contact selection.

Question 1: What is your street address? What is your phone number?
 STREET 1: 1234 111th Street, NE
 MAIN PHONE: (206) 819-4764
 STREET 2: Street (Line 2)
 CITY: Everett
 STATE: Washington
 ZIP: 98201
 MAIN PHONE TYPE: Mobile

Question 2: What is your preferred method of confidential communication?
 None

Question 3: Who is your emergency contact?
 EMERGENCY CONTACT: Emergency contact
 EMERGENCY CONTACT PHONE: 800.000.0000

Question 4: Secure Messaging
 Do Not Contact: None

BROWSER

The browser interface shows a sequence of two main steps for entering contact information. The first step covers address and phone number entry, and the second step covers preferred method of confidential communication and emergency contact selection.

Contact Information 1

STREET 1*
111 32nd Ave N

STREET 2
Type here

CITY* Seattle **STATE*** WA **ZIP*** 98125

Contact Information 2

PREFERRED METHOD OF CONFIDENTIAL COMMUNICATION*
Select an item

MAIN PHONE* (206) 123-4567 **EXT** **MAIN PHONE TYPE*** Mobile

PHONE 2 Type here **EXT** **PHONE 2 TYPE** Select an item

PHONE 3 Type here **EXT** **PHONE 3 TYPE** Select an item

PHONE 4 Type here **EXT** **PHONE 4 TYPE** Select an item

Enter Insurance Information (optional)

APP

The screenshot shows a mobile app interface for entering insurance information. At the top, the time is 10:40 and the battery is at 93%. The header reads "Insurance" and "Question 1 of 1". The main heading is "What is your insurance information?". Below this, there are several input fields: "INSURANCE" (a dropdown menu), "INSURANCE COMPANY NAME AS IT APPEARS ON CARD" (a text field), "CLAIMS MAILING ADDRESS ON BACK OF CARD" (a section header), "STREET 1" (a text field), "STREET 2" (a text field), and "STREET 3" (a text field). At the bottom, there are "Skip this step" and "Next" buttons.

Be sure to scroll down to fill out completely.

BROWSER

The screenshot shows a browser interface for entering insurance information. The title is "Insurance Information" and the subtitle is "If you intend to use insurance to pay for services, this information is required." The form includes: "INSURANCE" (a dropdown menu), "INSURANCE COMPANY NAME AS IT APPEARS ON CARD" (a text field with a hint "Type 'self pay' to decline insurance"), "STREET 1" (a text field), "STREET 2" (a text field), "CITY" (a text field), "STATE" (a dropdown menu), "ZIP" (a text field), "GROUP NUMBER" (a text field), and "MEMBER ID NUMBER" (a text field). At the bottom, there are "Back" and "Next" buttons.

Enter Credit Card Information (optional)

APP

The screenshot shows a mobile app interface for entering credit card information. At the top, the time is 10:42 and the battery is at 93%. The header reads "Credit Card Information" and "Question 1 of 1". The main heading is "Which card would you like to place on-file?". Below this, there are sections for "CARD INFORMATION" and "BILLING INFORMATION". Under "CARD INFORMATION", there are fields for "CARD ENTRY", "CARD NUMBER", "EXPIRATION DATE", and "CVV". Under "BILLING INFORMATION", there are fields for "FIRST NAME", "LAST NAME", "ADDRESS 1", "ADDRESS 2", "CITY", "STATE", "ZIP", and "EMAIL FOR RECEIPT". At the bottom, there are "Skip this step" and "Next" buttons.

BROWSER

The screenshot shows a browser interface for entering credit card information. The title is "Credit Card Information". The form is divided into two columns: "CARD DETAILS" and "BILLING INFORMATION". Under "CARD DETAILS", there are fields for "CARD ENTRY", "CARD NUMBER", "EXPIRATION DATE", and "CVV". Under "BILLING INFORMATION", there are radio buttons for "Patient: Use Patient's Billing Information" (selected), "New: Type Billing Information", "Guarantor: Use Guarantor's Billing Information", and "Card Manager: Card Manager Entry". There are also fields for "FIRST NAME" (Carmen), "LAST NAME" (Long), "ADDRESS 1" (111 32nd Ave N), "ADDRESS 2", "CITY" (Seattle), "STATE" (WA), "ZIP" (98125), and "EMAIL FOR RECEIPT" (jenni.monillas@valant.com). At the bottom, there are "Back" and "Next" buttons.

The credit card information will show under billing once the initial account information is completed.

APP users may update information once the onboarding information is completed.

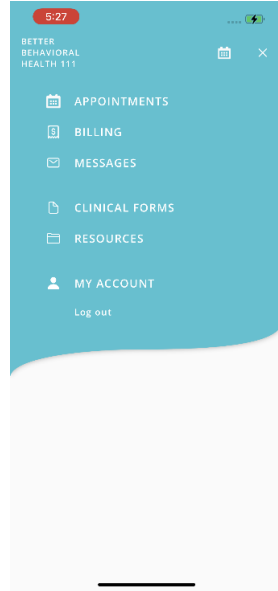
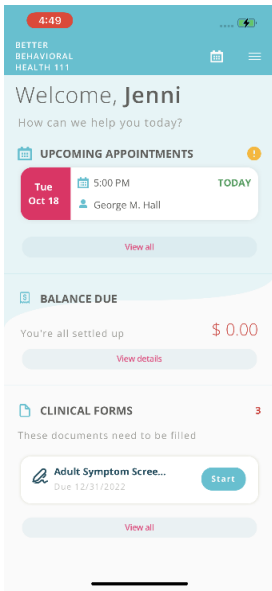
BROWSER users may use the back button to update previously entered information during the onboarding process.

The practice needs to verify the updates for them to remain in place.

Managing Your Care with MYIO

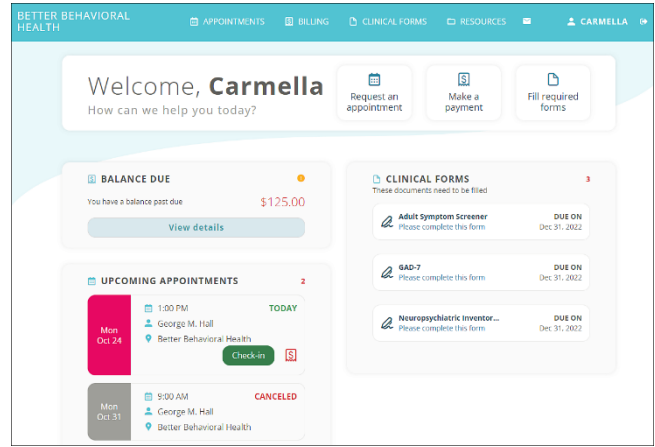
APP

Easy access to all features



BROWSER

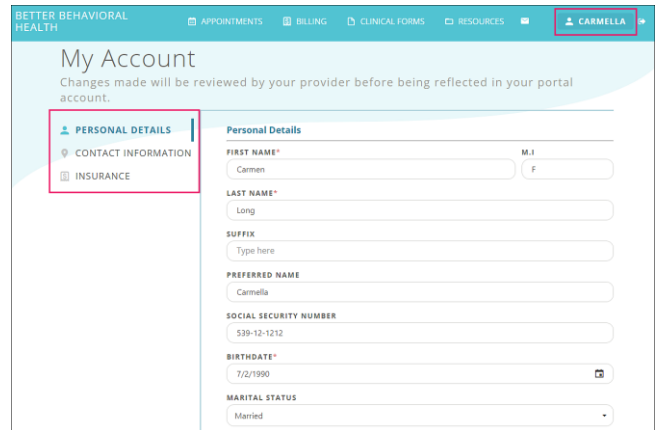
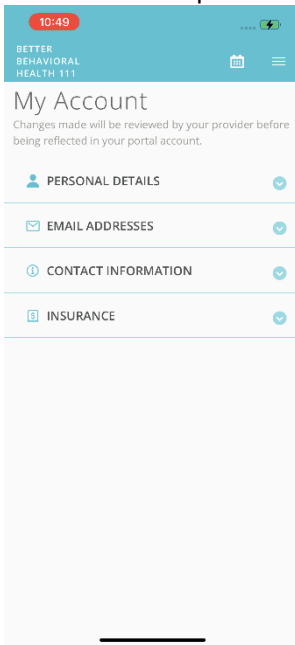
Welcome Screen



My Account

Access: click on My Account from top right menu in APP; user name top right in BROWSER

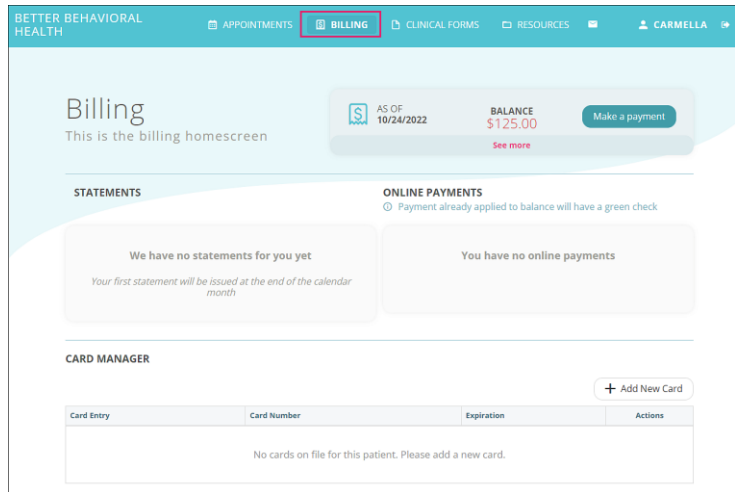
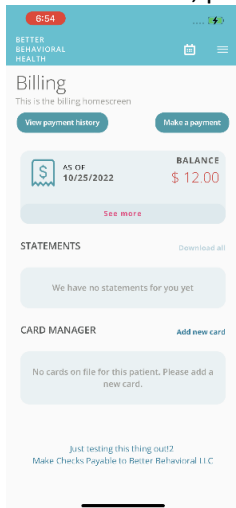
Functions: view personal details, contact information, insurance information



Billing

Access: click on View details from the welcome screen or Billing from top right menu in APP; Billing link in BROWSER

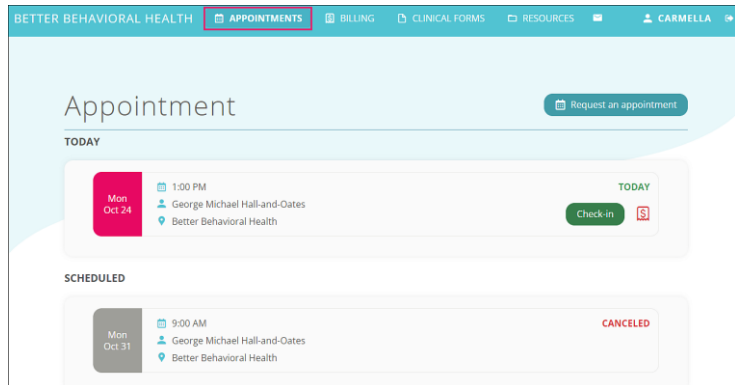
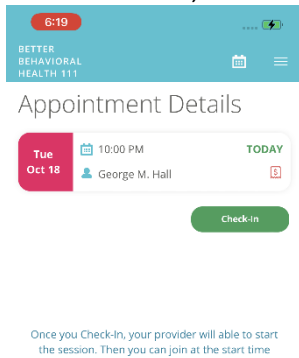
Functions: view, pay, enter credit card information



Appointments

Access: click on View all from the welcome screen, the calendar icon or Appointments from top right menu in APP; Appointments link in BROWSER

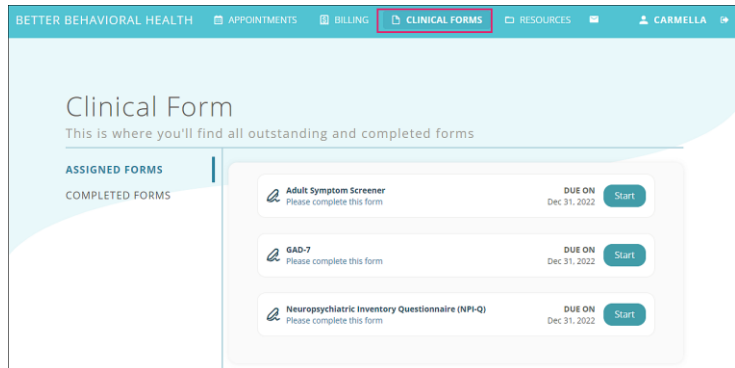
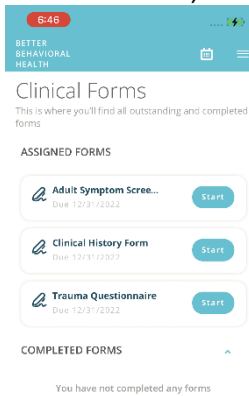
Functions: view, check in, request



Clinical Forms

Access: click View all from welcome screen or Clinical Forms from top right menu in APP; Clinical Forms link in BROWSER

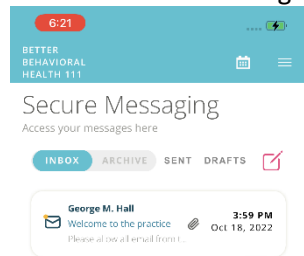
Functions: view, complete online by clicking Start



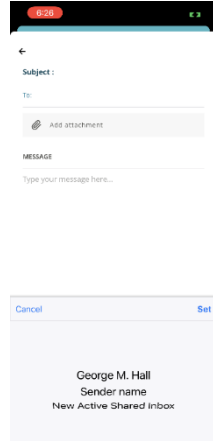
Secure Messages

Access: click Messages from top right menu in APP; envelope icon in BROWSER

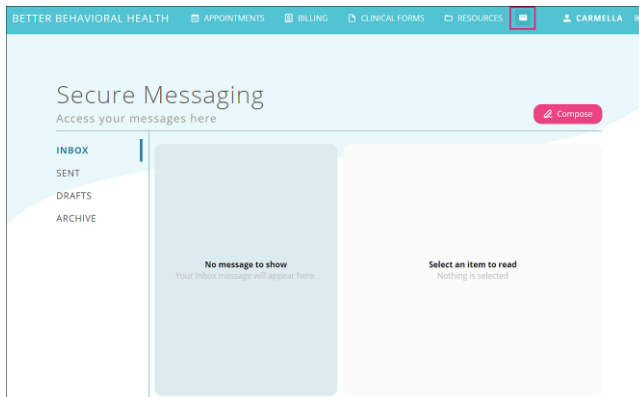
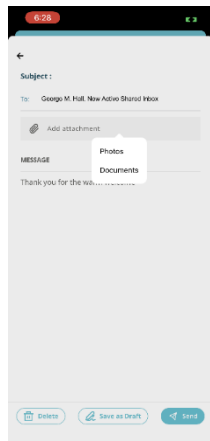
Functions: view message, reply, compose, add attachment



Compose a message



Add an attachment



Troubleshooting

Resetting Password: There is a “Forgot password” link on both the browser and mobile app login page. When tapped, you will be prompted to enter your username and the portal email address associated with your account. The email you receive will provide a link to reset your password. If this fails, your practice is able to manually reset your password.

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.

Browser: Clearing cookies and cache may help clear up any issues.

Contacting Practice: Contact the practice whenever any of the above troubleshooting steps fail.

Supported Devices, Operating Systems: Mobile device must be able to update to the latest iOS or Android operating system. **Browsers:** Google Chrome, Microsoft Edge, Mozilla Firefox.