Quick Reference Guide — To Create a New Patient Portal Account:

This procedure applies to patients who are not yet registered for the Patient Portal for the CareTeam Health Center.

2. On the Patient Portal home page, click Sign up today.

2. **Who will use this account?** — Click the “Patient” option.

3. Enter your information (name, date of birth, gender, email address, and phone number).

4. Click Continue.
   The Verify Your Identity page appears.

5. If you are not currently registered in the practice, select a provider from the menu shown.

6. Verify your identity by doing one of the following:
   - Select Email. Verify or enter your email address and click Send Code.
   - Select Call. Verify or enter your phone number and click Send Code.
   - Select Text. Verify or enter your mobile phone number and click Send Code.

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7. Retrieve the temporary passcode from the phone call, email, or text message, and enter the passcode on the Verify Your Identity page.

8. Click [Continue].
The Set Password page appears.

9. **New password** — Enter a password that meets the requirements. This password must be 8-20 characters long and must have at least one uppercase letter, one lowercase letter, and one number or symbol.

10. **Confirm new password** — Re-enter the password to confirm it.

11. **Remember this computer to save time resetting your password** — Check the box for the Patient Portal to remember the computer that you’re using.
   **Note:** You should check this box only if you’re using a private or personal computer. “Remembering the computer” makes recovering your password easier and quicker if you forget it. If you allow the Patient Portal to remember the computer, you will be prompted to answer only one security question, instead of three. (The Patient Portal considers detection of a remembered computer as one step in authentication.)

12. Check the **I accept the Terms and Conditions and Privacy Policy** box.

13. Click [Continue].
The Patient Portal Welcome page appears.

14. To further edit your profile, choose My Profile from the left hand side of the page and click [Edit]

15. Complete all required fields (indicated with a *) and click [Submit]

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My Profile / Contact Information

Your profile information is shown below. Please click the edit link to update this information.

Submit  Cancel

Contact Information

Name: Tina Test
Middle name + suffix: 
Address: 311 Arsenal Street
Address line 2: 
City: Watertown
State: Massachusetts  ZIP code: 02472-2782
Country: United States
Date of birth: 01/01/1980
Sex: Male Female

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Instructions to Add a Dependent to your Patient Portal

2. Log in to your Patient Portal account.
3. Click My Profile > Family Access.
4. Click Add Patient.

4. Enter demographic information about your family member who is also a patient at the practice.
   a. **First Name** — Enter the patient's first name.
   b. **Last Name** — Enter the patient's last name.
   c. **Email** — Enter the patient's email address. If the patient does not have an email address, select the **No email** option.
   d. **Date of birth** — Select the patient's date of birth.
e. **Phone** — Enter the patient's phone number.

f. **Your relationship to patient** — Select your relationship to the patient.

5. Click **Continue**.
   The Patient Portal will send a temporary passcode to the patient. If the family member (patient) is a dependent 6-17 years of age, the temporary code will be sent to employee parent/guardian.
   **Note:** By sending the temporary passcode to the patient, we inform the patient of your request to obtain access to his or her Patient Portal account. By giving you the temporary passcode, the patient consents to your receiving access.

6. Select how this passcode should be sent: email, call, or text message (these options depend on the patient contact information that is on file with the practice).

7. Click **Send Code**.

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8. Enter the temporary passcode that the patient received by email, phone call, or text, and then click **Continue**. You can now access your family member's information using your own Patient Portal account. Your Family Access page shows this access.

**Quick Reference Guide — To access Family Accounts in Patient Portal**

If you have access to more than one Patient Portal account (for example, if you have access to your own account and the accounts of your children), you can easily view any account. In the **“You are viewing”** menu in the upper left corner of the page, select the name of the person whose account you want to view. The Patient Portal displays the selected account information.

[Images of Patient Portal interfaces]

[Link]: www.careteamhealth.com/c&fbank
Quick Reference Guide for Scheduling an Appointment for the CareTeam Health Center

2. Log in to your Patient Portal account.
3. Click the Appointments option on the left side of the Patient Portal window. The scheduling window appears.
4. Select a reason for the new appointment from the menu.

I'd like to schedule a new appointment:

- Select reason -

Follow Up
Annual Physical
Problem
Injection/Vaccination
Lab Work
Other reason

Follow Up
I need to follow up with my provider about a condition or other issue I have.
4. Click the **Find Appointments** button.
   A calendar appears, along with provider and location menus, and a time of day selector.

5. Select your preferences using the calendar and one or more of the filter fields: **Provider**, **Location**, and **Times** options.
   Appointments that meet your criteria appear on the right side of the window.

6. Select an appointment.
   The appointment information is displayed for your review.

7. Review the information to make sure it's correct and enter a note for the provider if you want.

8. Click the **Schedule Now** button.
   The Patient Portal displays a confirmation message and sends you a confirmation email.