Patient Portal

User Guide

Accessing the Patient Portal

The Patient Portal helps patients schedule their medical appointments and provides the clinic with an effective communication channel. Ask your clinic how to access their portal as not every clinic links their patient portal to their website.

Requirements to create your portal account
- Be of age of consent for care in the province your clinic is located in.
- Own an email address to which you have access to.
  - Note that the same email address can not be used for more than one portal account.

Benefits of your portal account
- Book appointments
- Receive messages, documents or bills from your clinic
  - Note that clinics can allow patients to reply to their communications.
- Send messages to your care team when allowed by your clinic.
- Manage profiles for your family members
  - Note that your family members must consent to sharing their profile with you. Once shared, you can book and manage their appointments and communications with the clinic. Ask your clinic to add your family members' profiles to your portal account.

Click on one of the links below to get started with your clinic's patient portal:

Creating a portal account
From the clinic's patient portal,
From the clinic's email invitation.

Logging into your portal account
Resetting a forgotten password.

Managing your portal account
Browsing through your portal account,
Configuring your credentials,
Managing multiple profiles,

Losing access to a profile.

Managing Appointments

Booking an appointment or an urgent appointment,

Confirming and cancelling an appointment from your portal account or from your email.
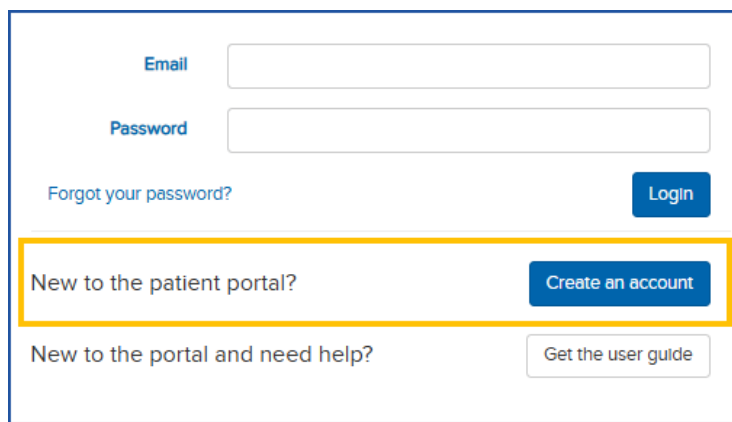
Managing your Inbox

Managing messages,

Bills,

Documents,

Replying to communications, and

Receiving email notifications.

Creating an Account From the Patient Portal

To create an account in your clinic's patient portal, follow the steps below:

1. **Access your clinic's Patient Portal login page.**
2. **Click on *Create an account* under the *New to the patient portal?* section.**

3. **Fill out the fields displayed on the page.**
   - Fields with a red asterisk are mandatory and can vary depending on the clinic.
4. **Enter your email address and confirm it.**
   a. You must have access to an email address to create your portal account. It is not permitted to create more than one portal account using the same email address.
5. **Create your password and confirm it.**

      a. The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, $...).
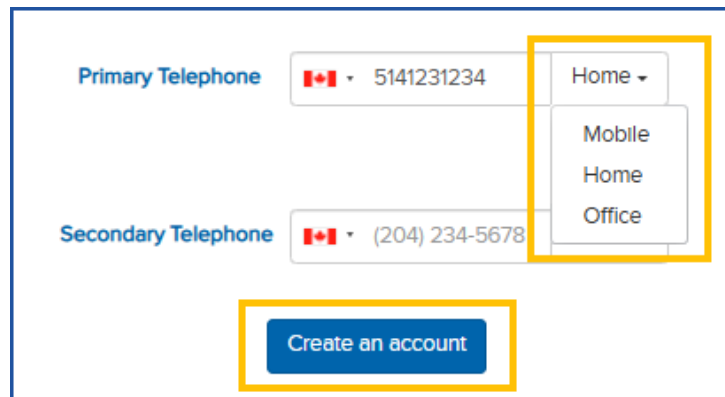
6. **Fill out the personal information fields.**

      a. To create a portal account, you must be older than the minimum age of consent for treatment in your province. To use the portal for a child, you must first create an account for the parent or tutor. You can then ask the clinic to add the child's profile to the parent's portal account.

7. **Add a phone number where you are easily reachable.**

      a. **Click the drop-down list on the right side to specify the type of phone you are adding.**

8. **Click *Register* when you have filled in all the required information.**

      a. If the option is unclickable, it means that at least one field is empty or incorrectly filled.

9. **Activate your portal account by opening the message sent to the email address used to create the account. Click *Activate Your Account*.**

      a. The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
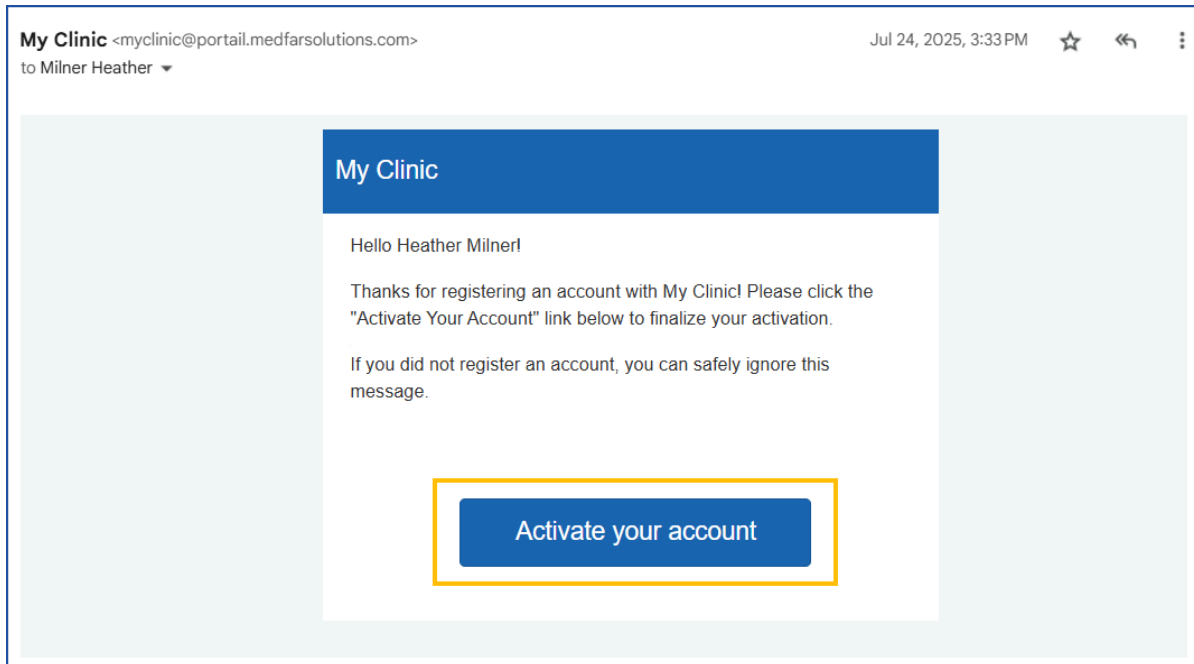
10. **Read the patient portal's** *Terms and Conditions* **and click** *I have read, understood and accepted the Terms and Conditions* **at the bottom of the page.**
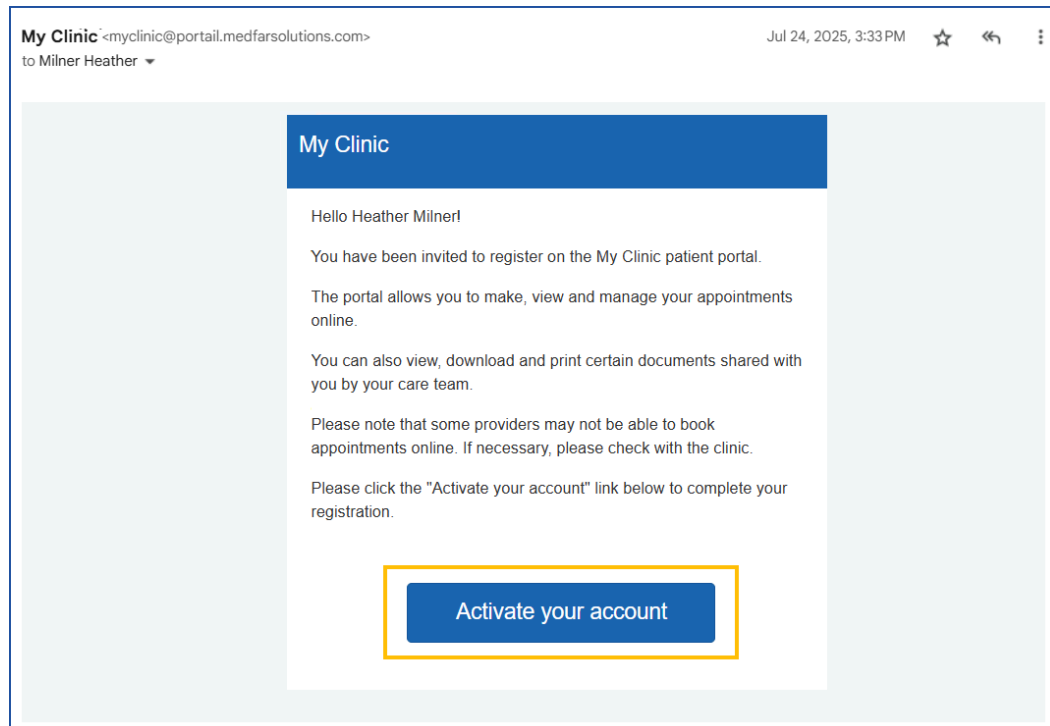
Creating a Portal Account From the Clinic's Invitation

To create an account using the clinic's invitation, follow the steps below:

1. **Connect to your email inbox and open the message received from your clinic.**

   a. The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.

   b. **Click on *Activate your account*.**

2. You are redirected to the patient portal's login page.

3. **Fill out the required fields.**
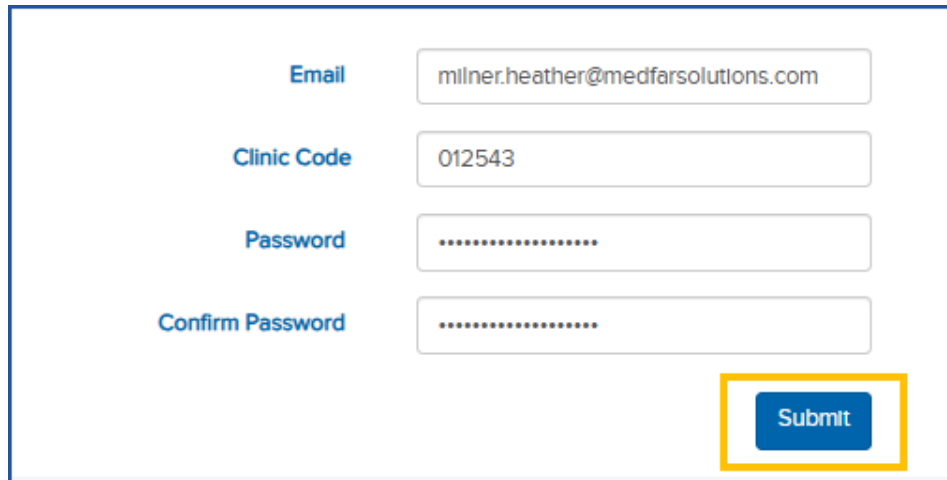
   a. **Enter the code given to you by the clinic.**

      i. The code given by the clinic is valid for a set period. If you try to activate your account past this time limit, the code will have expired. You will have to contact the clinic so they can provide you with a new invitation and a new code.

   b. **Create your password and confirm it.**

      i. The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, $...).

   c. **Click on *Submit* once all the boxes are filled out.**

4. **Read the patient portal's *Terms and Conditions* and click *I have read, understood and accepted the Terms and Conditions* at the bottom of the page.**

Logging Into Your Clinic's Portal Account

To log into your portal account, you must use the email address and password used while registering. To do so, follow the steps below:

1. **Access your clinic's Patient Portal login page.**
2. **Enter your email address.**
3. **Enter your password.**
4. **Click on *Login*.**
   a. An error message is displayed if your credentials are incorrect. See how to reset your password.
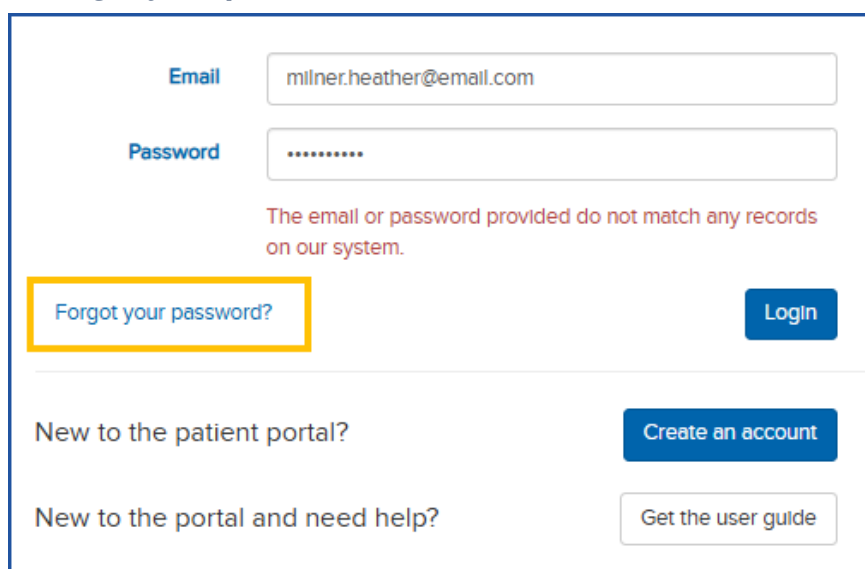
Resetting a Forgotten Password for Your Portal Account
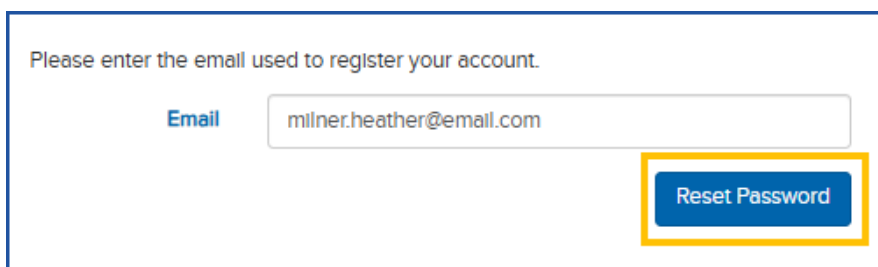
If you get an error message when trying to log in, it is possible that the email address or password entered are incorrect. If, however, you have forgotten your password, you can reset it from the patient portal's login page. To reset your password, follow the steps below:

1. **Check that your email address is correctly entered in the *Email* field.**
   a. If you have more than one email address, make sure you are using the one registered to your portal account.
2. **Click on *Forgot your password?***

3. **Check that the email address used to create your account is in the designated field and click on *Reset Password*.**

   a. A message will let you know an email was sent with a recovery link.
4. **Connect to your email inbox, open the message from your clinic and click *Reset Your Password*.**
   a. The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
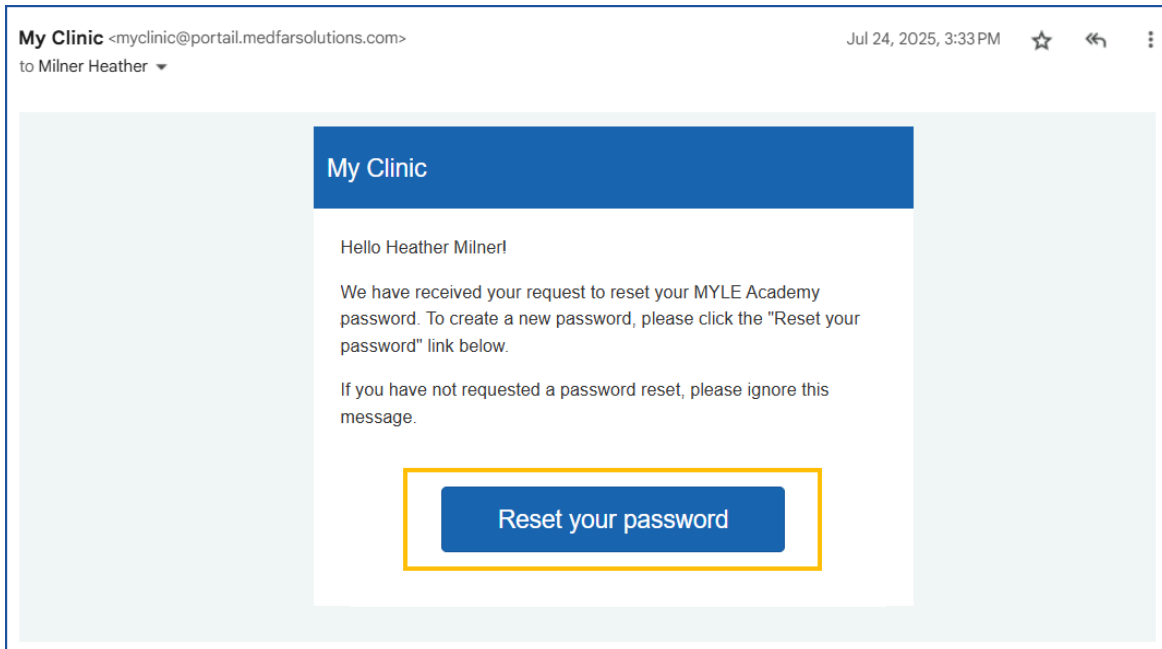
    b. You are redirected to a recovery login page.

5. Create a new password and confirm it.

    a. The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, $...).


6. Click on *Submit*.

Managing Your Portal Account

The dashboard is the landing page of your portal account. From this page, you can manage your login settings, your future appointments and the different profiles linked to your account, if applicable.

Your portal account is divided into 4 sections; the header menu at the top, the navigation tabs on the left sidebar, all the recent activity on the right-hand side and the content in the center of the page.

- The header menu features information related to your portal account.
    - o The clinic's name and contact information.
    - o The language settings and logout option.
- The left side menu contains all the navigation tabs to your portal account.
    - o The name and information of the currently selected profile gives access to the dashboard.
    - o All the tabs giving you access to the clinic's different services.
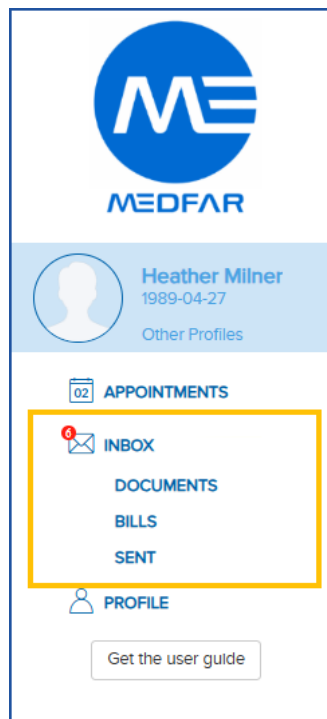
- The recent activity section displays a chronological timeline of the last few actions related to the current profile.

o The recent activity lines are clickable so you can be easily redirected to a specific action. This section can be used to navigate quickly within the portal account.
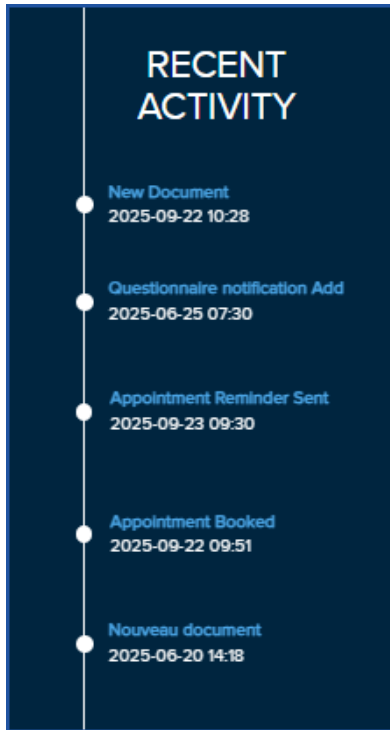
- The content at the center of the page discloses all the information related to the selected tab.

Updating Your Portal Account Credentials

To log into your portal account, you must use your email address. If you change email address, you can update your login email address at all times from your account.

Note that if you fear your password was compromised, you can also update it from your portal account any time you wish.

To learn how to update your login credentials, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Click on your name from the left margin to open your dashboard.**
   a. **Update your login credentials:** your email address, or your password.
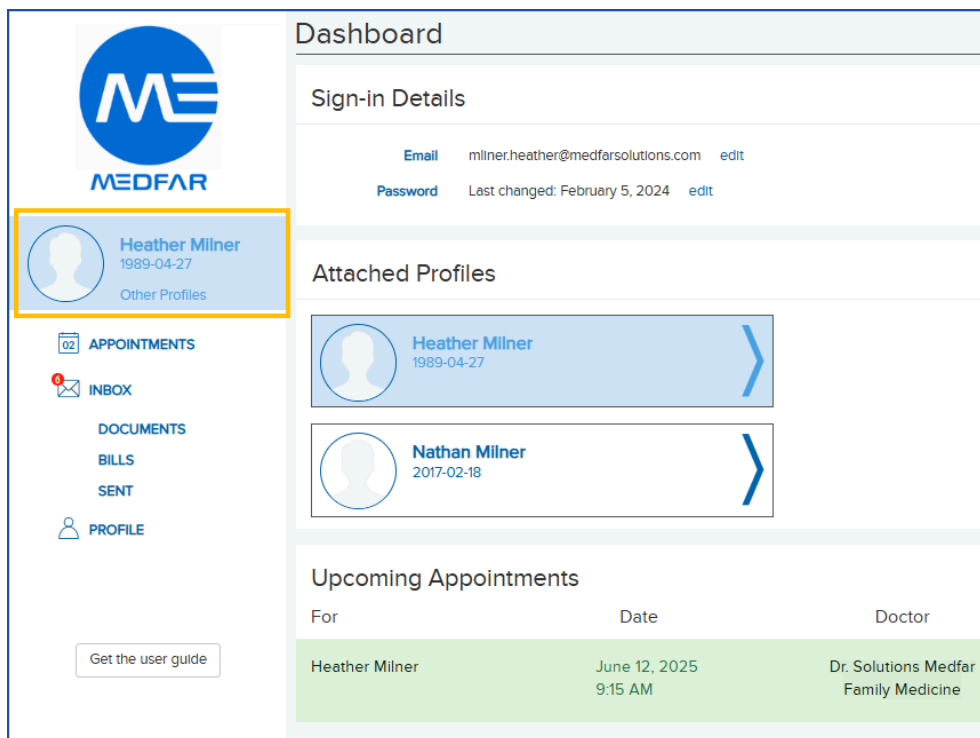
3. **Select *edit* opposite your email address to change the login email address of your portal account.**
   a. Note that you will not be able to use an email address that is already registered to another portal account.

b. **Enter your password in the required field to confirm you are the account owner of the portal account.**

c. **Enter the new email address and confirm it.**

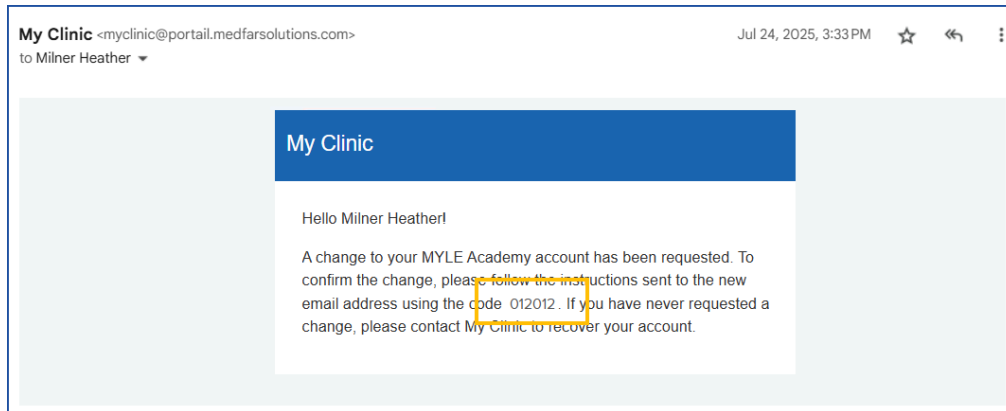d. **Click on *Save* to apply the modification.**

e. **Select *Done* from the pop-up window.**

f. A message is sent to your old email address with an activation code.

g. A message is sent to your new email address with a link to access the confirmation page.

  i. Click on the link to be redirected to the confirmation page.

  ii. The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox.
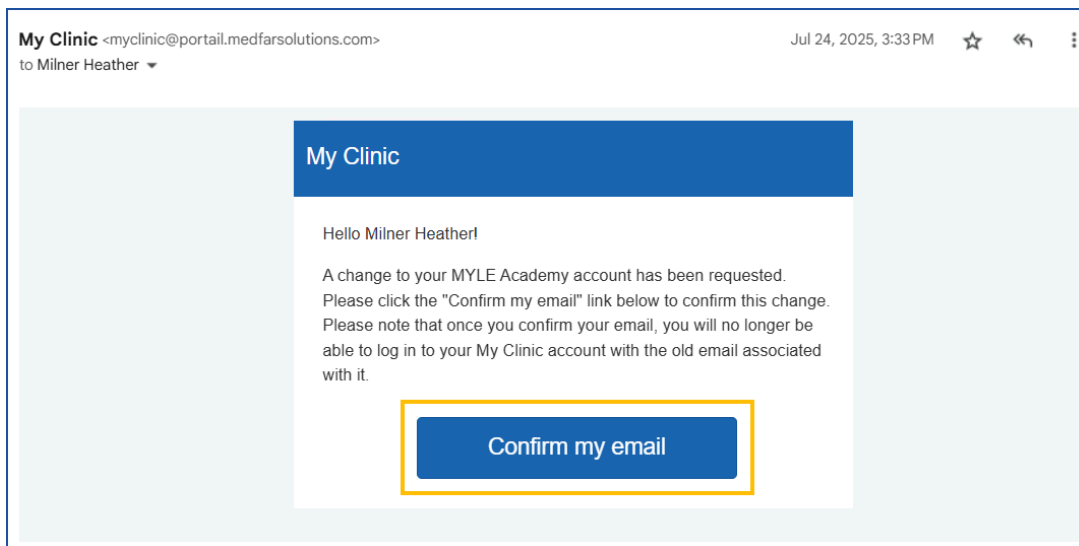
h. **Enter the code provided in the *Clinic Code* field.**

i. **Click *Submit* to access your portal account.**

4. **Select *edit* opposite the password section if you wish to change your current password.**

a. To change your password from this section you must know your current one. If you do not remember your current password, use the *Forgot your password?* on the login page.

b. **Enter your current password in the *Old Password* field.**

c. **Enter your new password and confirm it.**

   i. The password must have 8 characters or more and contain at least one lowercase, one uppercase, one number and one special character (!, @, #, $...).

d. **Click on *Save* to apply the modification.**

e. **Select *Done* from the pop-up window.**

Password Changed ✕

Your password has been changed.

Done
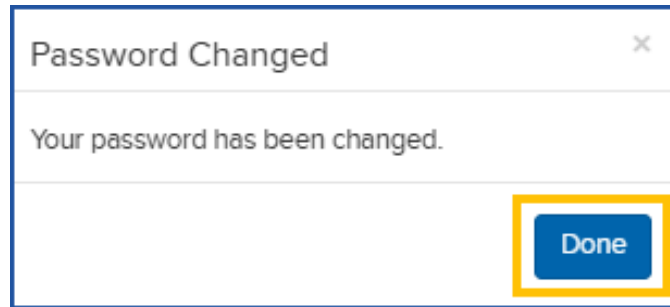
Managing Multiple Profiles Within One Portal Account

If you manage someone else's medical care, like a child, an elderly person or any other person under your care, and have a portal account under your name, you can ask the clinic to add their profile to your portal account.

In order to manage other profiles than your own from your portal account, you must communicate with your clinic:

1. **Call or contact your clinic and ask them to add the profile of the person under your care to your portal account.**
    a. If that person is over the age of consent for treatment, the clinic will need their approval.
2. **Determine with the clinic which tabs are necessary to manage the profile of the person under your care:** booking appointments, viewing bills, viewing documents, and viewing and sending messages.

Once the profiles are added to your portal account, follow the steps below to learn how to manage them:

3. **Log into your clinic's Patient Portal.**
4. **From your portal account, access your *Dashboard*.**
    a. **Click on your name in the left margin to access your *Dashboard*.**
5. **Find all the profiles to which you have access to in the *Attached Profiles* section.**

6. **Select the profile for which you want to take actions.**

   a. Once the profile is selected, its name will appear in the left margin.

   b. From now on, managing appointments, and managing the inbox will affect this profile only.

Losing Access to a Profile on Your Portal Account

Since a person younger than the age of consent for treatment is not allowed to have a portal account, a parent or guardian can add the child's profile to their own portal account. However, the day the child reaches the age of consent for treatment, the parent or guardian will lose access to the child's profile and the following message will be on the account:

For the parent or the guardian to regain the access to the child's profile, they must contact the clinic directly. The child must give their approval for the parent to be granted access to their medical profile.

Managing Appointments From your Portal Account

You can book, confirm and cancel appointments with your clinic's healthcare professionals directly from your portal account.

Booking an Appointment

Booking an appointment online lets you view the available slots in a calendar format and makes it easier for you to compare those availabilities to your personal schedule. To book an appointment, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Open the *Appointments* tab.**
3. **Select *Book an appointment*.**

4. **Choose a specialty that fits the type of consultation you are seeking.**
   a. The specialties offered vary depending on the clinic.
5. **Choose the practitioner with whom you want to book an appointment with.**
   a. Note that your assigned provider is displayed at the top of the list.

6. **Select the address that fits best with your location if your clinic has multiple sites.**

7. **Select the type of appointment that best fits your needs.**

8. **If needed, select when you would like the appointment and add a reason for the appointment.**
   a. **Check *As soon as* to see the next available options, or select *Anytime after* to see options starting from that date. Add a date or click the dropdown menu to choose from the calendar.**
   b. **Use the text field to add information describing the reason for the appointment.**

      c. **Click on *Next*.**

9. **Select the time slot that works best with your schedule.**

      a. **Use the arrows at the top of the page to change between weeks.**

          i. **If desired, click on the menu at the top of the page to change your previous selections.**

      b. **Select an appointment by clicking on the desired slot.**

10. **Check the appointment details to make sure that you selected the correct appointment.**

      a. **Click on *Confirm Appointment* to book the appointment.**

b. Click on *Done* to return to the *Appointment* tab where you can manage your appointments.

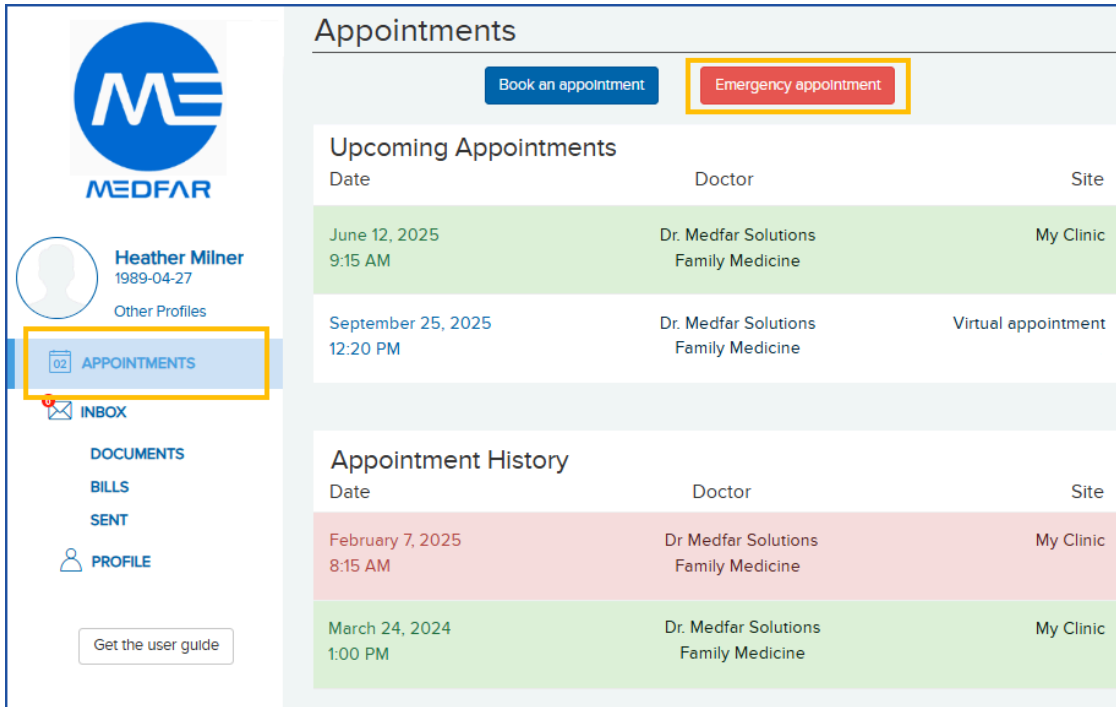11. Note that booked appointments can only be confirmed 72 hours beforehand but can be cancelled up to 48 hours before its date.

Booking an Emergency Appointment

Emergency appointments are meant to book a consultation with a health professional and are reserved for emergencies. To book an emergency appointment, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Open the *Appointments* tab.**
3. **Choose *Emergency Appointment*.**

4. **Select the address that fits best with your location if your clinic has multiple sites.**
5. **Choose the type of appointment that best fits your needs.**

6. **Enter the reason for your appointment in the text field.**
    a. **Click on *Next.***
7. **Select the time slot that works best with your schedule.**
    a. **Use the arrows at the top of the page to change between weeks.**
        i. **If desired, click on the menu at the top of the page to change your previous selections.**
    b. **Select an appointment by clicking on the desired slot.**

8. **Check the appointment details to make sure that you selected the correct appointment.**

    a. **Click on *Confirm Appointment* to book the appointment.**

    b. **Click on *Done* to return to the *Appointment* tab where you can manage your appointments.**

9. Note that booked appointments can only be confirmed 72 hours beforehand but can be cancelled up to 48 hours before its date.

Confirming and Cancelling an Appointment From Your Portal Account

You can confirm and cancel an appointment directly from your portal account.

Confirming an appointment

- Can be done from the patient portal 72 hours before the appointment start time.
- Can be done for any profile linked to your portal account.

Cancelling an appointment

- Can be done from the patient portal up to 48 hours before the appointment start time.
    - To cancel an appointment that is in less than 48 hours, you must contact the clinic directly.
- Can be done for any profile linked to your portal account.

To confirm or cancel an appointment from your portal account, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Manage appointments from your dashboard or open the *Appointments* tab.**
    a. Note that if you manage multiple profiles from your account, appointments for all profiles are shown in your dashboard, whereas only appointments for the selected profile, shown in the left margin, are listed in the *Appointments* tab.
    b. The *Upcoming Appointments* table is divided into up to 4 columns. The name of the person the appointment is for, the date and time of the appointment, the name of the provider and the name of the clinic.
    c. Appointments are shown in different colors based on their status:
        i. Appointments in green are booked and confirmed.
        ii. Appointments in white are booked, but have yet to be confirmed.
        iii. Appointments in red are cancelled.

3. **Click on a booked appointment to view its details.**
    a. **Collapse the detailed view of an appointment by clicking on the header.**
4. **Validate that the appointment details work with your schedule.**
    a. Note that the date before which the appointment can be cancelled is visible under the appointment cancellation and confirmation options.
    b. Note that messages specific to your visit may appear at the bottom of the appointment details.
5. **Take one of the 2 following actions: confirm or cancel the appointment.**
    a. **Click on *Confirm Appointment* to send the confirmation to the clinic.**
        i. If you don't have the option to confirm an appointment, it means that the consultation is in more than 72 hours. If you want to confirm an appointment you need to be within the allowed period.
    b. **Click on *Cancel Appointment* if it no longer suits your schedule.**
        i. Appointments can be cancelled online up to 48 hours before their time. To cancel appointments within the next 48 hours, you must call the clinic.

Appointments

Upcoming Appointments
Date

Dr Medfar Solutions

My Clinic
201-1224 Rue Stanley
Montréal, QC, H3B2S7
—
(555) 123-4321

June 13, 2025
9:00 AM

Annual Visit
20 minutes

Cancel Appointment   Confirm Appointment

This appointment cannot be cancelled after 10 June 2025 at 9:30 AM

Heather Milner
1989-04-27
Autres profils

02 APPOINTMENTS

INBOX

DOCUMENTS
BILLS
SENT

PROFILE

Get the user guide

Confirming and Cancelling an Appointment from Email Notifications

If you receive email notifications for appointments booked with your clinic, you can confirm and cancel them by email. To do so, follow the steps below:

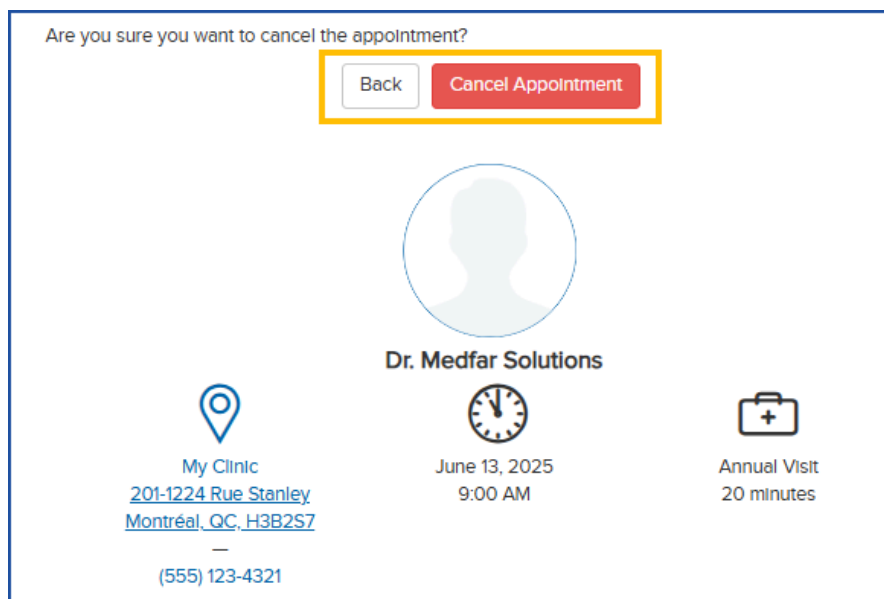1. **Connect to your email inbox and open the message sent by your clinic.**
   ○ The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox
2. **Check the appointment details and validate that the appointment details work with your schedule.**

   a. Note that the date before which the appointment can be cancelled is visible under the appointment cancellation and confirmation options.
   b. Note that a message specific to your visit may appear at the bottom of the appointment details.
3. **Take one of the 2 following actions:** confirm or cancel the appointment.
   a. When cancelling, a new window opens.
      i. **Click on *Cancel Appointment* to confirm the action.**
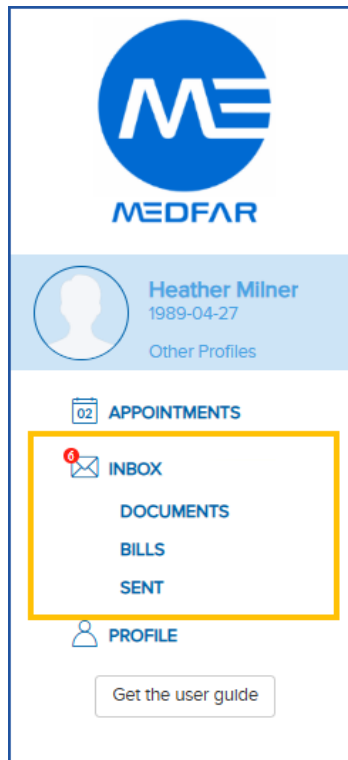   ii. If you cancelled the appointment by mistake, click on *Back*.

4. **If needed, log into your portal account or contact the clinic to book a new appointment.**

Managing Your Inboxes from Your Portal Account

The patient portal offers your clinic a way of sharing information with you. All communication shared by the clinic with your portal account is stored in the *Inbox* tab.

Depending on your clinic's configuration, some sections might not be available to you.

- The *Inbox* tab regroups all communications shared by the clinic to your portal account.
  - The red counter indicates the total number of unread communications shared with you.
- The *Documents* tab contains all communications shared with you with attached documents such as forms, statements, referrals, and more.
- The *Bills* tab groups all communications shared with you with attached bills.
- The *Sent* tab lists all replies or messages you have sent to the clinic staff.
  - Sent messages are always shown in a thread where you can find the original message at the top.

If you are managing multiple profiles, make sure to select the desired profile before managing inboxes.

Managing Your Communications

Received messages from the clinic are located in the *Inbox* table. Messages shared with attached documents, or attached bills will also be filed in the corresponding inbox to help you manage your communications better.

Messages that you send to the clinic, when allowed by your clinic, will be stored in the *Sent* inbox.

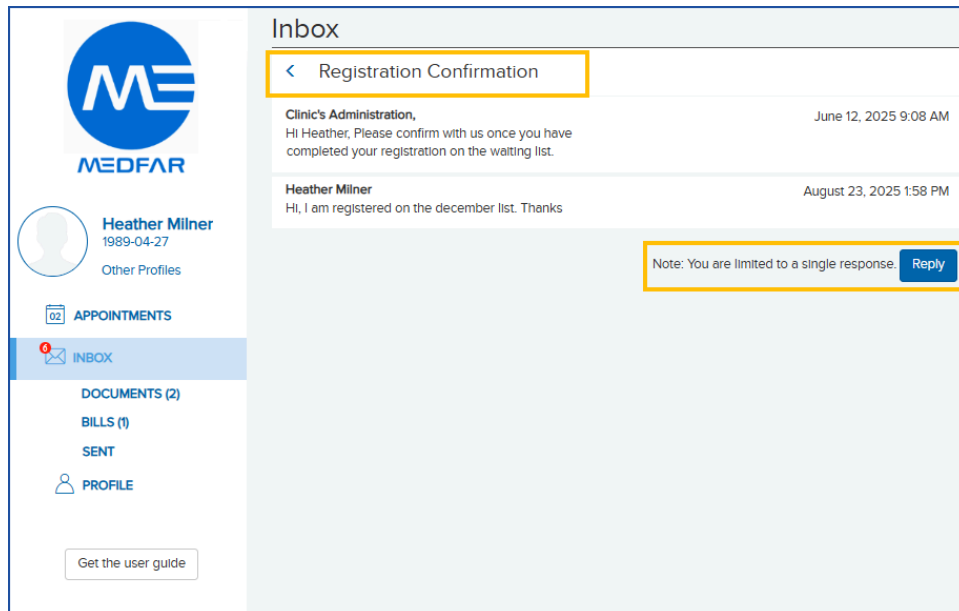To manage received communications sent by the clinic, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Open the *Inbox* tab.**
   a. **Make sure to select the correct profile if you have more than one linked to your account.**
   b. The red counter on the *Inbox* tab indicates the total number of unread communications.
   c. Unread communications are shown in bold in the table.
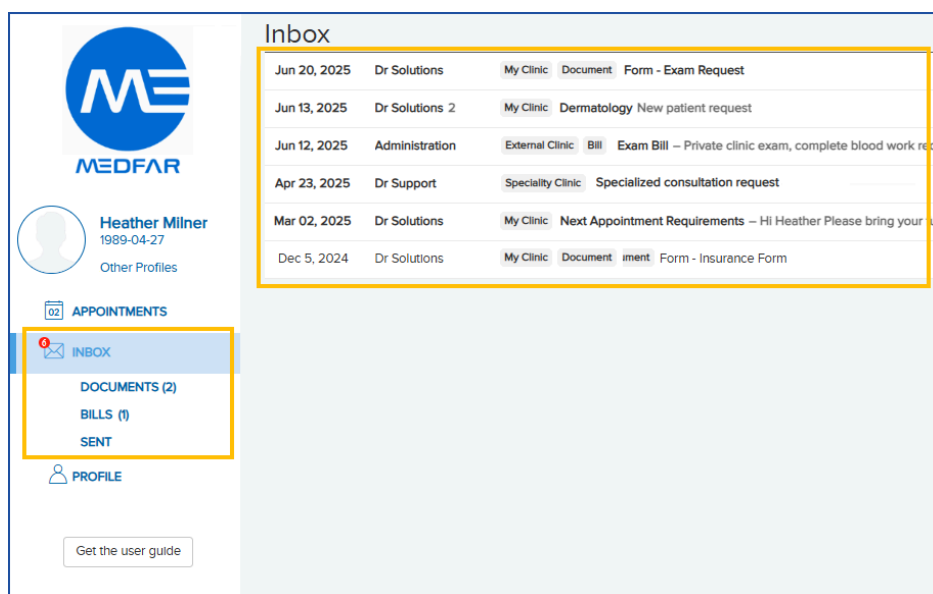
3. **Open a communication by clicking on it.**
   a. The most recent message appears at the top of the page.
4. **If available, click on the *Reply* option if your clinic allows it.**

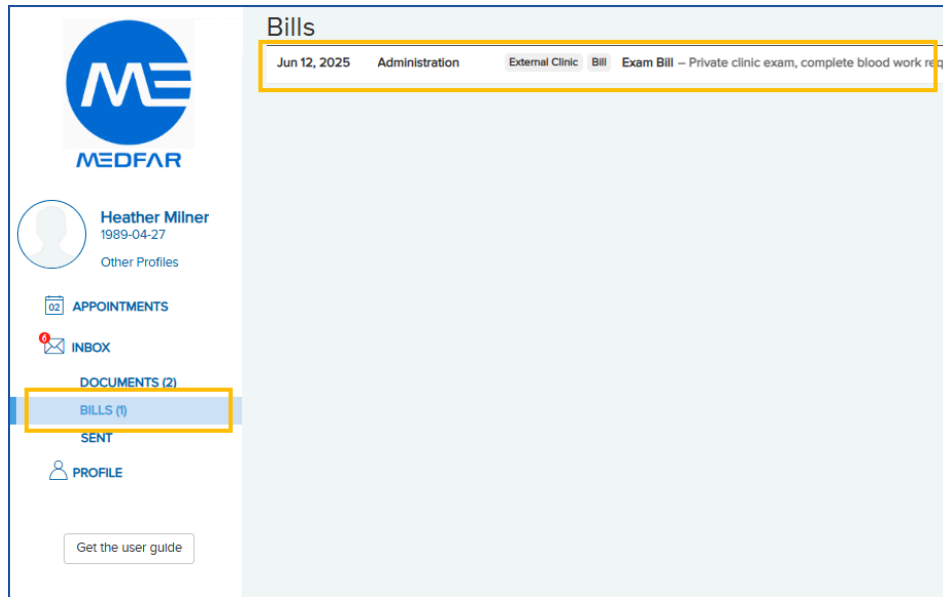a. Note that your reply will be displayed below the original communication.

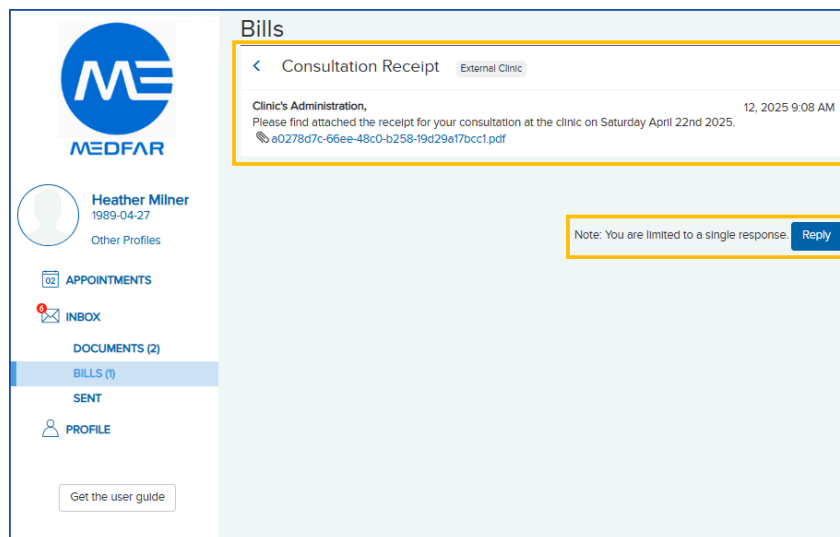**5. Click the arrow at the top to go back to the communications list.**

Managing Your Bills

To manage invoices sent by the clinic, follow the steps below:

1. Log into your clinic's Patient Portal.

2. Open the *Bills* tab below *Inbox*.

a. Make sure to select the correct profile if you have more than one linked to your account.

b. The number in parenthesis indicates the number of unread bills shared with you.
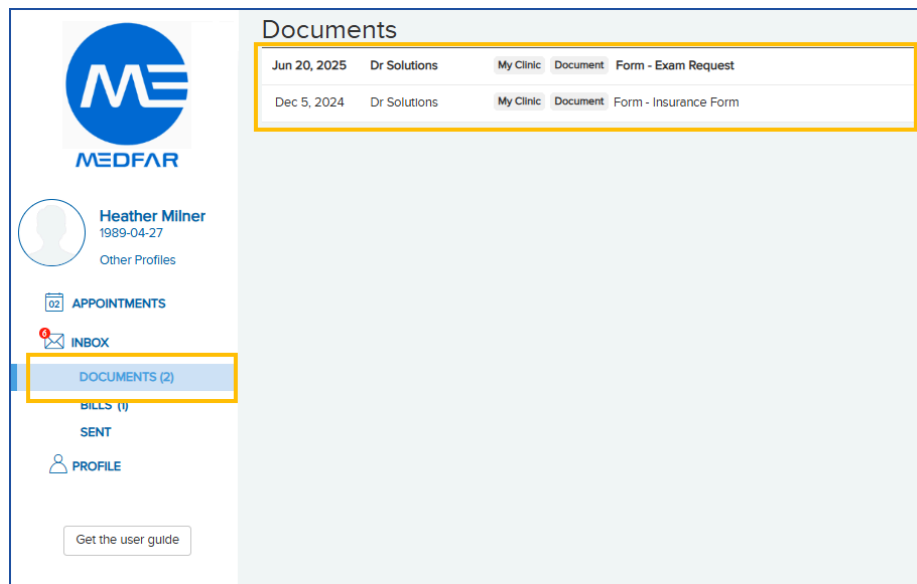
c. Unread bills are shown in bold in the table.

3. **Click on the communication to open it.**
   a. The most recent message appears at the top of the page.
4. **Click on the attachment link to open the invoice in a new window to view it, or to print it.**
   a. **Use the download icon to download the bill onto your device as a PDF file.**
5. **If available, click on the _Reply_ option if your clinic allows it.**
   a. Note that your reply will be displayed below the original communication.
6. **Click the arrow at the top to go back to the invoice list.**

Managing Your Documents

To access documents sent to your portal account by the clinic, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Open the *Documents* tab below *Inbox*.**
   a. **Make sure to select the correct profile if you have more than one linked to your account.**
   b. The number in parenthesis indicates the number of unread documents shared with you.
   c. Unread documents are shown in bold in the table.

3. **Click on the communication to open it.**
   a. The most recent message appears at the top of the page.
4. **Click on the attachment link to open the invoice in a new window to view it, or to print it.**
   a. **Use the download icon to download the document onto your device as a PDF file.**
5. **If available, click on the *Reply* option if your clinic allows it.**
   a. Note that your reply will be displayed below the original communication.
6. **Click the arrow at the top to go back to the document list.**

Documents

Dermatology My Clinic

Dr Solutions,   June 12, 2025 9:08 AM
🔗 e4bc5a50-6f06-4b36-9d95-f94fd3488a60_signed.pdf

Dr Medfar Solutions   June 12, 2025 9:08 AM
Hi Heather,
Here is the form request for your consultation request in dermatology.
Please print, fill out and bring the form to your dematology appointment.

Dr Medfar Solutions   July 26, 2025 11:23 AM
Hi Heather,
We have received your preleminary results in dermatology.
Please share additionnal results once completed.
Thank you.

Note: You are limited to a single response.   Reply

Heather Milner
1989-04-27
Other Profiles

02 APPOINTMENTS

✉ INBOX

DOCUMENTS (2)
BILLS (1)
SENT
PROFILE

Get the user guide

Replying to a Communication from your Patient Portal

When sharing a message, a document or a bill with you, your clinic can allow you to reply to the communication directly from your portal account. This allows you to answer any question raised by the provider or the clinic staff in the communication without having to call the clinic.

To learn how to reply to a communication sent by your clinic, follow the steps below:

1. **Log into your clinic's Patient Portal.**
2. **Open the *Inbox* tab.**
3. **Select the communication from the list to reply to it.**
4. **Click on the *Reply* option in the lower right corner of the communication.**
   a. Note that the reply option is only visible if enabled by your clinic.
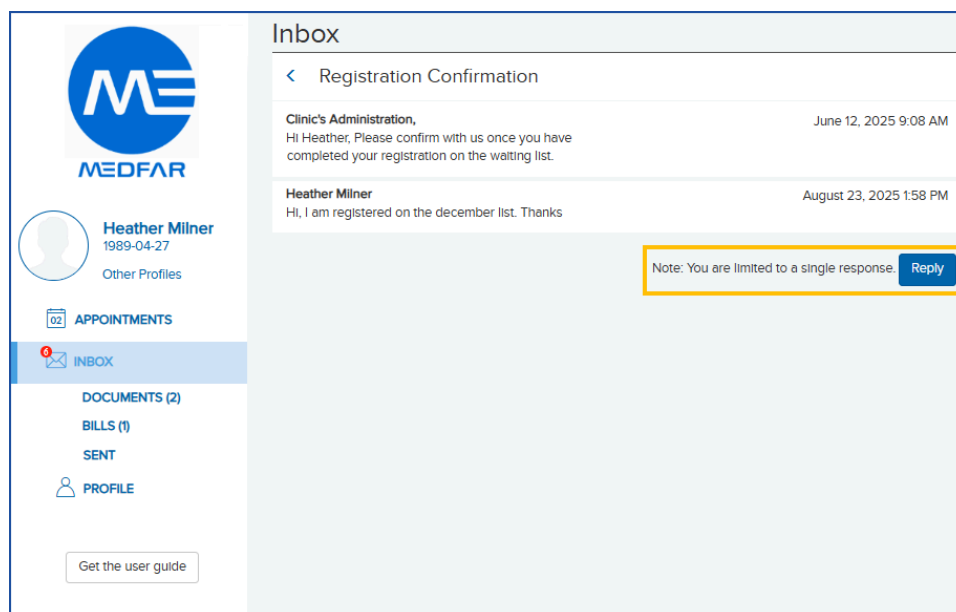
5. **Enter your message in the text box.**
   a. Note that you are limited to 500 characters.
6. **Read the disclaimer and confirm you have read it.**
7. **Click on *Send*.**
   a. Note that your answer is displayed below the communication.

Accessing Email Notifications

For every communication shared to your portal account, an email notification is sent to you.

Tip: Make sure to contact your clinic if you no longer wish to receive notifications, as unsubscribing directly from the email will prevent you from receiving any email from the patient portal, including password reset requests.

To access shared information by the clinic, follow the steps below:

1. **Connect to your email inbox and open the communication sent by your clinic.**
   - The email may be stored in your spam folder. Make sure to check it if you don't find it in your main inbox
2. **Click *View the Message* or *View the Document* or *View the Invoice*.**
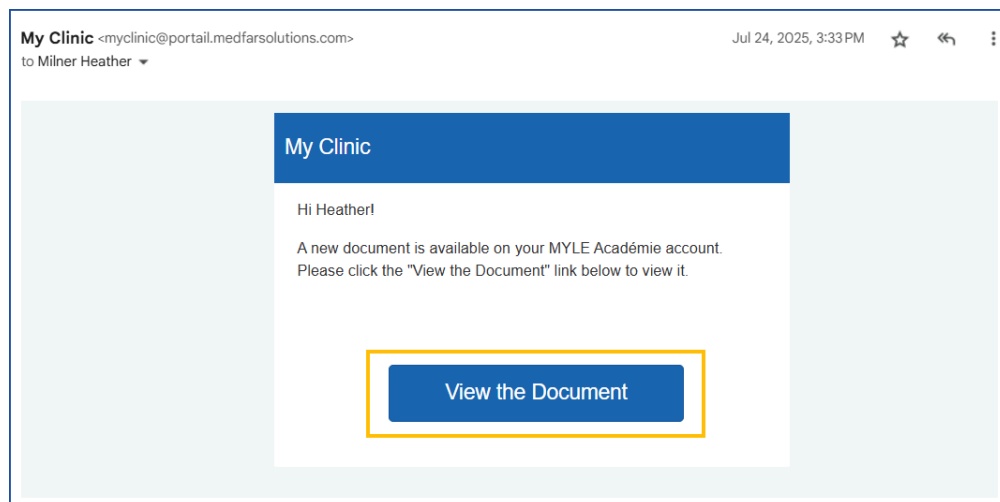
   a. You are redirected to the patient portal login page.

3. **Log into your portal account.**
4. You land directly on the new communication page.