

How to Upload Documents

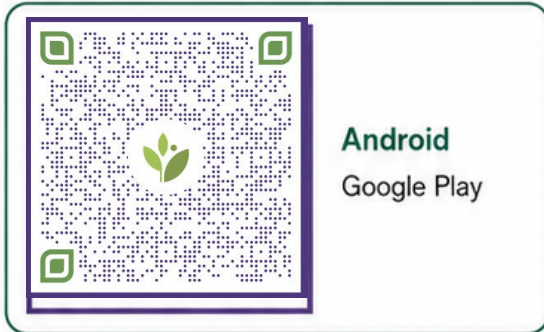
Athena Patient Portal

1

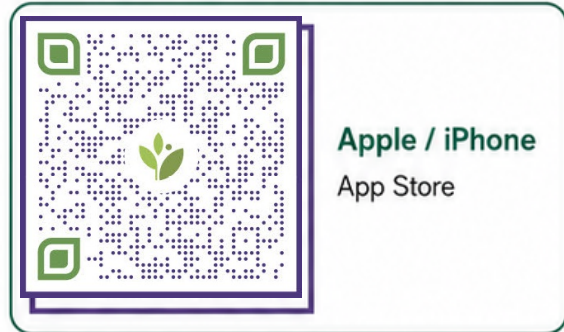
Log in to the Athena Patient Portal or the Athena Patient App.

Go to www.instinctivewellness.com. The portal link is at the bottom of the page.

You may also use the Athena Patient App. Scan the QR code for your device to download the app.



Android
Google Play



Apple / iPhone
App Store

2

Start a message from the portal home page or the Messages section.

You may begin your message from either location within the portal.

3

Complete the message template and attach files.

A screenshot of the Athena Patient Portal interface. The top navigation bar includes links for Calendar, Patients, Claims, Financials, Reports, Quality, Apps, and Support. The left sidebar shows a menu with Home, Appointments, Billing & Payments, Messages (highlighted), My Health, Test Results, and Documents. The main content area is titled 'Medical Question' with a sub-header 'Dial 911 in the case of a medical emergency.' Below this is a message form with fields for 'Provider / Care Team' and 'Office location' (both dropdown menus), a 'Subject' text box, and a 'Message' text area. A 'Send Message' button is at the bottom right. A footer note states: 'Complete the required fields, then use the Attach button to upload files.'

4

Complete every required field before sending.

The message will not send until all required fields are completed. Include the provider / care team, office location, subject line, and a brief note in the message body. The attachment option appears underneath the message body.

Prepare Your Files

File limits, accepted formats, and records to send before an initial appointment

Portal limits

- ✓ Each file may be up to 10 MB.
- ✓ Accepted formats: PDF, JPG, or PNG.
- ✓ You may attach up to 10 files per message.
- ✓ Attachments are for clinical purposes only.
- ✓ Do not upload credit-card or payment information.

Convert other file types

- ✓ Microsoft Word and Excel files can often be saved as PDFs.
- ✓ For Excel files, arrange columns and page margins before saving so the information remains lined up and readable in PDF format.

For an initial appointment, please upload:

- Any laboratory results from the last 2 years.
- Diagnostic imaging that is pertinent to your current symptoms.
- Recent consultation notes that are pertinent to your current symptoms.
- Unless related to your current symptoms, we do not need mammograms, Pap smears, or unrelated diagnostic imaging.

Name every file before uploading it

Files must be named before they are uploaded to the portal. You can rename files on an iPhone, Android phone, or computer.

For device-specific directions, search for your phone or computer type and how to rename a photo or file.

Upload from a computer or phone

- If you are using a computer, choose files stored on your computer.
- If you access the Athena portal through the web browser on your phone, you can take and upload pictures from your phone.

Keep phone photos upright

Take pictures with the phone held upright rather than sideways. Otherwise, the image may upload sideways and be difficult to read.

Organize Records Before Uploading

Combine related pages carefully so the clinical record remains complete and easy to review

Please combine related items into one file.

- ✓ Combine laboratory reports from the same date of service into one file.
- ✓ Combine diagnostic-imaging reports that contain more than one page.
- ✓ Combine consultation notes that contain more than one page.
- ✓ Do not combine reports from different dates of service or different report types, unless they are serial notes from the same provider.
- ✓ If you first send phone pictures to your computer, you can combine them using Paint or Adobe.

Why this preparation matters

Records help us see the full clinical picture

We recognize that preparing and uploading records can be a significant amount of work, especially when you have many records. These documents are vital to your care because they help identify patterns and past medical history that may be contributing to your current concerns.

Your role in record management

Instinctive Wellness does not have the staff to process all outside records for patients, and we do not solicit records from other providers. Patients are responsible for obtaining, naming, organizing, and uploading the records they want reviewed. If you are having difficulty, please ask a family member or friend who can help.

Traditional medical practices commonly employ several staff members to manage records. Those staffing costs are one reason many practices rely on brief, 15-minute visits and must see more patients each day. We are working to preserve extended visit times because longer visits improve the opportunity to understand your needs and help you meet your health goals. To support that model, we require patients to take an active role in managing records sent to us and records they want shared with other providers.

The Athena patient portal contains the records for care you receive through Instinctive Wellness. You may access and share those records with any provider you choose.

Thank you for understanding and for being an active participant in your care.