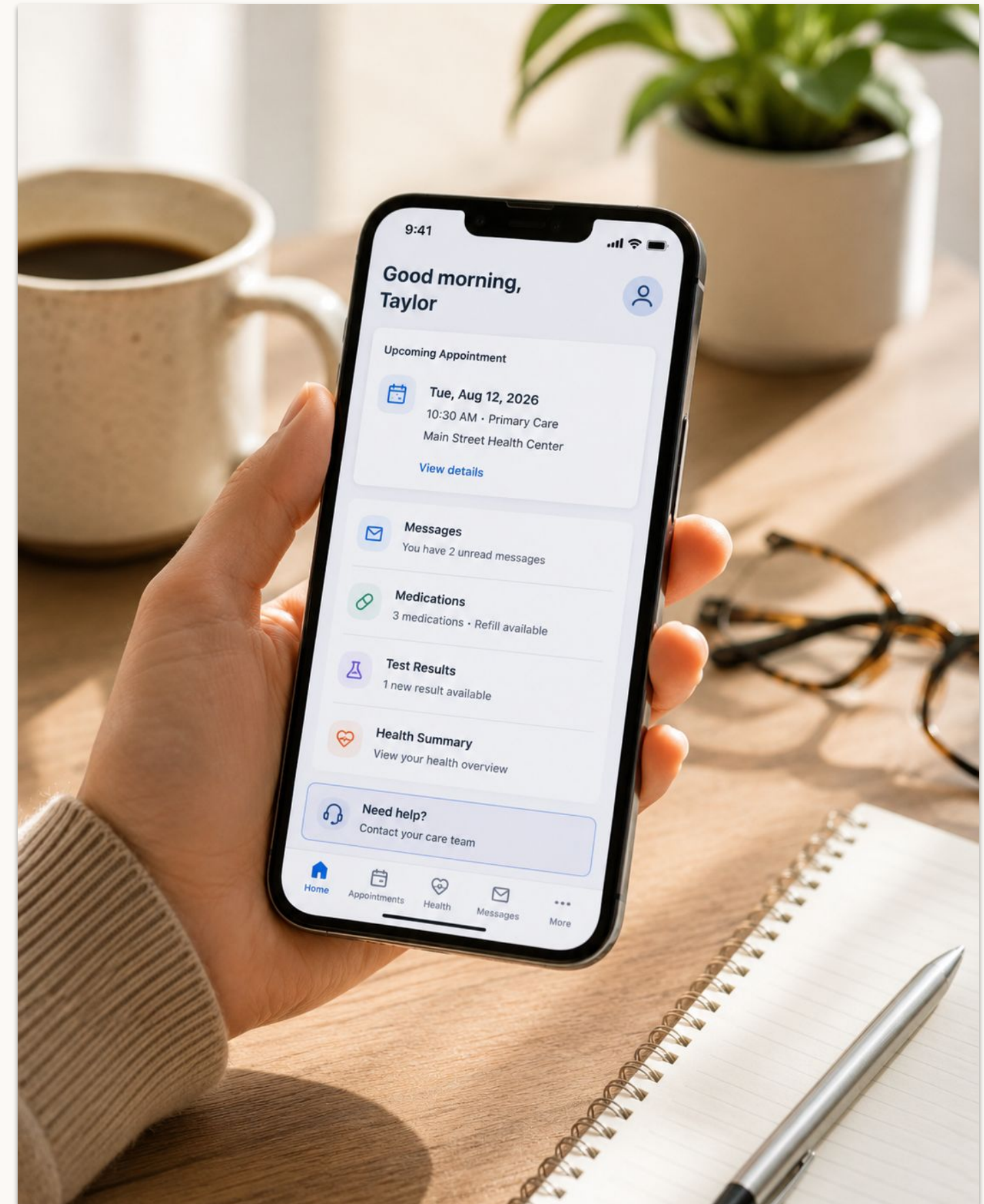


MyChart and Other Patient Portals

Managing Your Health Online

RJ Reyes

RGEA Lunch and Learn | August 12, 2026



Three questions to ask yourself

1

Do I have one?

2

Do I know what mine is called?

3

Have I ever actually logged in?

Wherever you land on that list, we are here to help you feel confident navigating digital health.

POLL 1

Have you ever signed in to a patient portal?

- ☐ Yes, I use it regularly
- ☐ Yes, but only once or twice
- ☐ No, never
- ☐ I am not sure whether I have one

POLL 2

What has made it hardest to use a patient portal?

☐ I did not know I had one

☐ I could not find it or log in

☐ I am not sure it is safe

☐ No one has shown me how

☐ Nothing, it works fine for me

This changed for everyone

As health records and the tools to manage them moved online, a lot of people of every age were left to work out the changes on their own, or with very little help.

If any of it has felt confusing, that is a reasonable place to be. Today is about what changed, how these tools work now, and why it is worth knowing.

What we will cover

A

Finding your portal, whatever it is called

B

Keeping your information safe

C

What it actually does for you

D

Making sense of the ones already out there

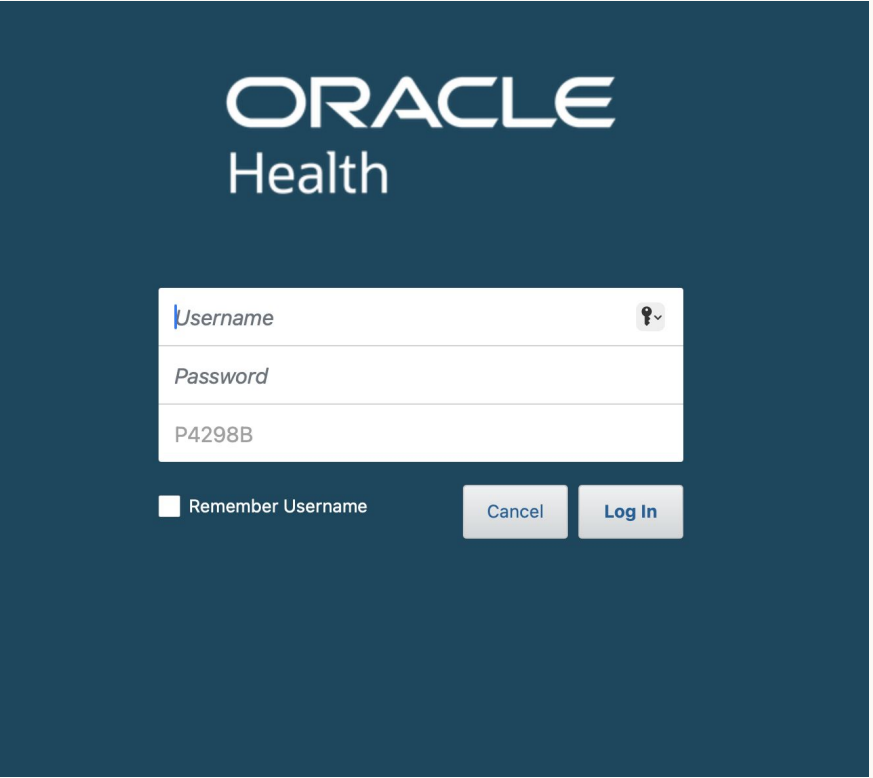
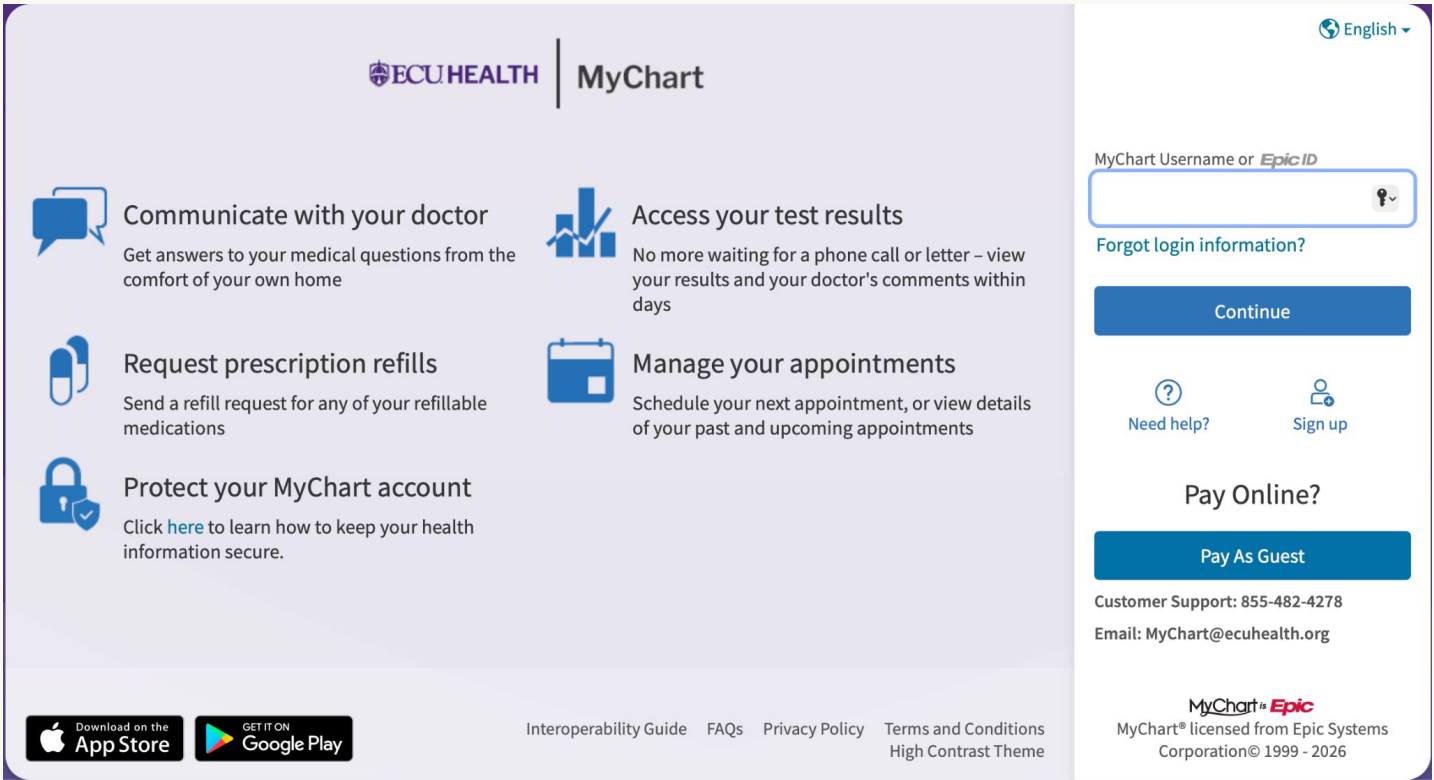
What a patient portal is

A secure website and app from the place you get your care

- 1 See your test results
- 2 Message your care team
- 3 Request refills
- 4 Manage appointments
- 5 View your records

A different name at every system

Three Portal Login Examples



Same purpose, different software, different names.

Two ways to find yours

Start here

- Go to mychart.org/LoginSignup
- Pick your state
- Find your health system and sign up

Do not see yours?

- You almost certainly still have one
- Go to the health system's own website
- Look for Patient Portal or Medical Records
- Other portals run on names like Oracle Health, MEDITECH, or athenahealth

Today's handout lists the major North Carolina health systems with portal names, web addresses, and help lines.

What is not a patient portal

Two logins, two completely different pictures of a person's health

Insurance portals

- MyHumana, Aetna, eBenefits, Caremark
- Claims and coverage
- Your ID card
- What a drug will cost

A patient portal

- From a doctor or hospital
- Test results and visit notes
- Your medication list
- Messages to your care team

State Health Plan retirees: go to orbit.myncretirement.gov, log in, then select eBenefits.

If you get your care through the VA

My HealtheVet, now at va.gov/my-health

The sign-in method changed

- The older My HealtheVet username and password no longer work
- DS Logon has been retired
- Sign-in now goes through Login.gov or ID.me

If a recent sign-in attempt was turned away, this change is usually the reason.

Verified August 2026

Is it safe?

Yes, and here is what actually protects it

1

Your own username and password

Not shared, not printed on anything

2

Two-step verification

A code sent to your phone or email

3

Fingerprint or face on your phone

Faster than typing, and harder to steal

4

A legal duty on your health system

They are required to protect it

Password Best Practices

Simple steps to help keep your accounts safe.



Use Face ID or another biometric option

Use Face ID or another biometric option on your mobile device when possible.



Do not share your password

Do not share your password with anyone.



Write it down safely

Write down your password in a safe place that only you can access.



Use a unique password

Use a unique password and change it if you think someone else may know it.



A strong password is your first line of defense.

Small steps today help protect what matters most.

All those usernames and passwords

This is the most common frustration with portals, and it is fair

1

Phones have a password keeper built in

It stores and fills them in for you

2

Writing them down is fine

Keep the list secure at home, away from the device

3

Within MyChart, one sign-in can cover several systems

More on how that works shortly

Why everything wants to verify you

Security standards have tightened as more of health care and government moved online. Proving identity now takes more than a name and a birthdate.

These are separate. A Login.gov account does not sign anyone into a hospital portal, and portal credentials do not work on a government site.

Two different systems

- Government sites use Login.gov or ID.me
- Health system portals use their own identity questions

How a real portal message behaves

Knowing the pattern is what makes an imitation obvious

1

It says something is waiting, and stops there

A result, a message, a bill

2

It asks the person to sign in

It does not carry the information in the email itself

3

It never asks for identifying numbers

No Social Security number, no Medicare number, no password

Anything that breaks that pattern is worth a second look.

Important Rules

Never click a link in an email or text about health records.

Open the app directly, or type the web address into the browser.

S.C.A.M.

Stop • **Confirm** • **Avoid giving out personal information** • **Make a report**

What it actually gives you

Five things people use these tools for

**Message your
care team**

**Appointment
Scheduling**

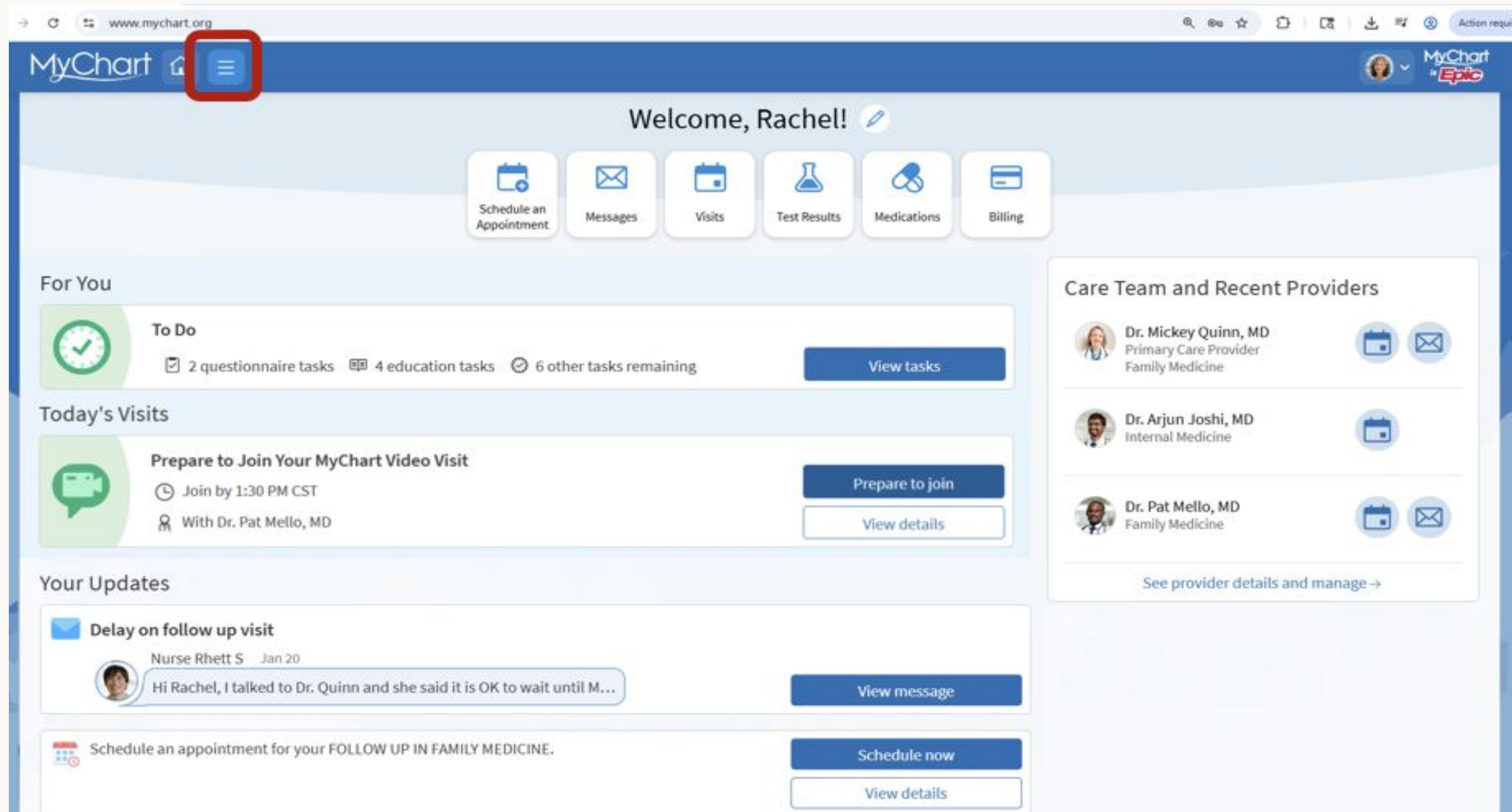
Records

Test Results

**Prescription
Refills**

What it looks like once you are in

Most portals open to a screen much like this one



What to look for

- Big buttons for the common tasks
- A menu, often behind three lines or a Menu label
- Recent messages and results down the middle
- Your name and settings in a corner

Example from an Epic MyChart account. Layouts and available features differ by health system.

See your test results

Instead of waiting for a phone call

- Results usually post as soon as they are finalized
- Sometimes before your doctor has reviewed them
- Notes and visit summaries
- You can watch a number trend over time, which matters most if you are managing something ongoing

Worth knowing

- Seeing a result before the doctor is normal now
- A number outside the usual range is not automatically bad news

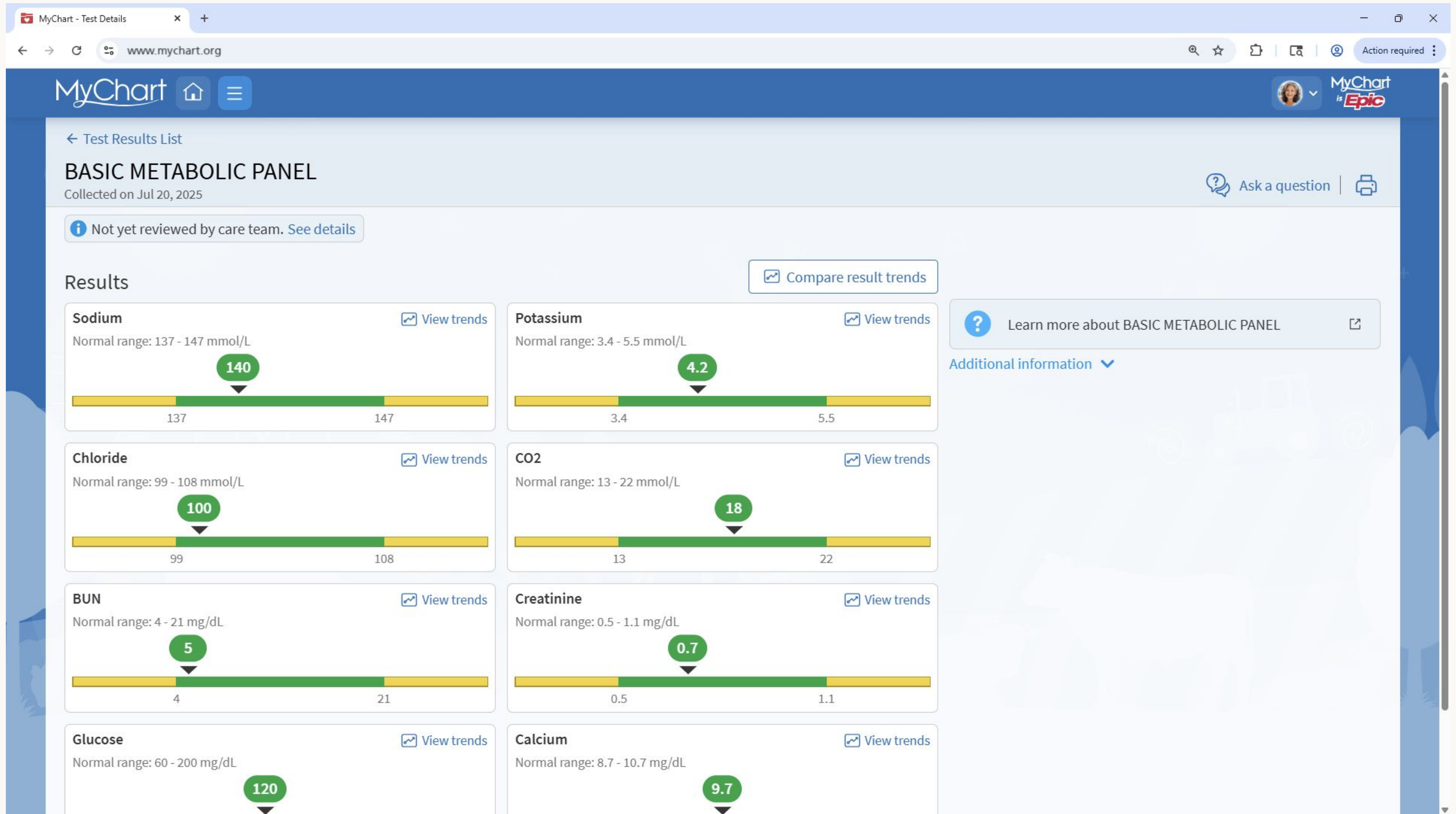
[Back](#)  [Test Results](#) [Close](#)

Settings and filters 

Search test results  

Individual Results
Showing 5 of 5

-  **CBC**
Jul 20, 2025
 Dr. Pat Mello, MD
-  **BASIC METABOLIC PANEL**
Jul 20, 2025
 Dr. Pat Mello, MD
-  **LIPID PANEL**
Jul 26, 2024
 Dr. Arjun Joshi, MD
-  **BASIC**



Message your care team

- For questions or tasks that are not urgent
- Faster than phone tag, and it is in writing so you can read it again
- Good for: a question about a medication, a follow-up on a result, an update on something ongoing

Not for emergencies

- Chest pain, trouble breathing, or a fall is still 911

[Back](#)  [New message](#) [Close](#)

What would you like to do?



On-Demand Video Visits
Connect with a healthcare professional remotely to discuss your concerns and receive medical advice through a secure portal. →



Refill a medication
Request a refill for a prescription from your Medications list. →



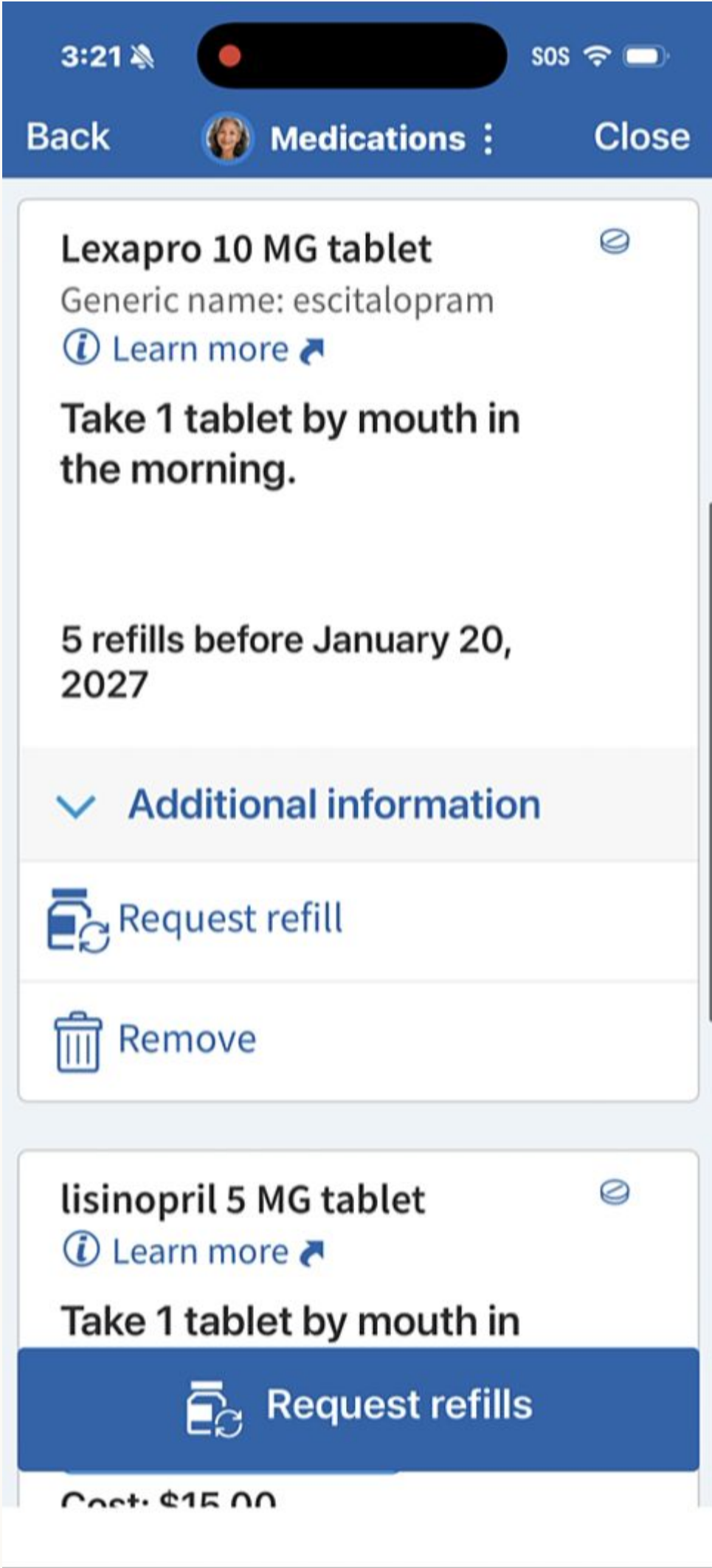
Schedule an appointment
Request or schedule an appointment with a member of your care team from the Scheduling activity. →



Start E-Visit

Request refills

- Request from your chair, no phone call
- See how many refills you have left
- Check when you last filled it
- Review your dosage and directions

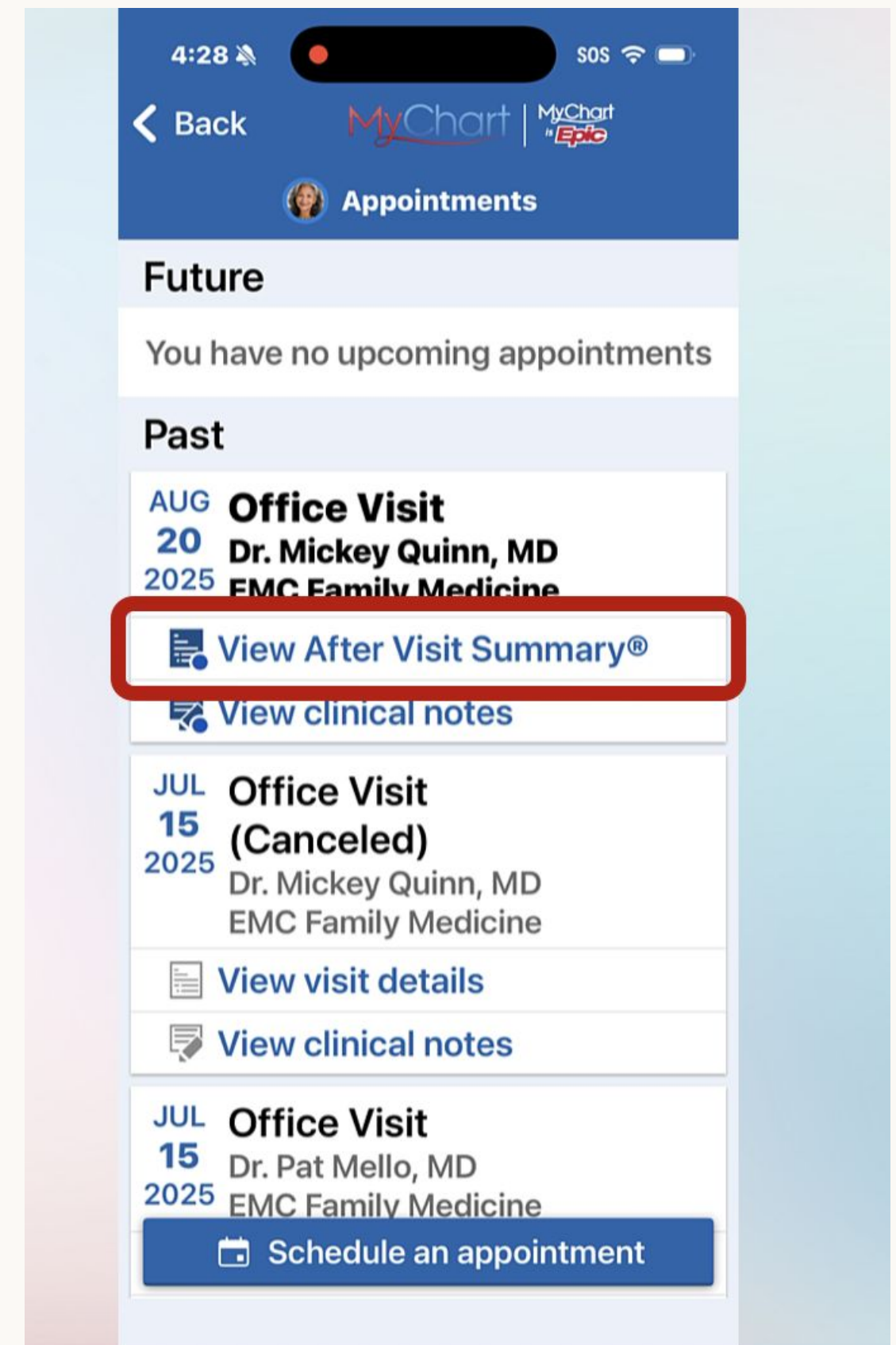


Appointments and getting seen sooner

- Schedule, cancel, and review past visits
- eCheck-in replaces the clipboard in the waiting room

When your doctor is booked weeks out

- Look for E-visit, Talk to a Doctor, or Find Urgent Care in the menu
- Many urgent cares let you hold a spot online before you drive over



Video visits and your records

- Video visits: no drive, no waiting room
- Most portals let you download or export a copy of your records
- Look for Sharing, Document Center, or Request Records
- Bills live under Billing. Ask for an itemized statement if the summary is not enough

You have a right to your records.

Not every system has every feature

Two people on the same software can see different options

Commonly varies

- Booking your own appointment
- Video visits
- Viewing clinical notes
- Paying a bill or seeing an estimate
- Requesting proxy access online

Also true

- The app and the website layout do not always match
- Some features appear in only one of the two
- Health systems switch features on over time

If something described here is missing, that is a setting at that health system.

POLL 3

How many different patient portals do you have?

☐ One

☐ Two or three

☐ Four or more

☐ I am not sure

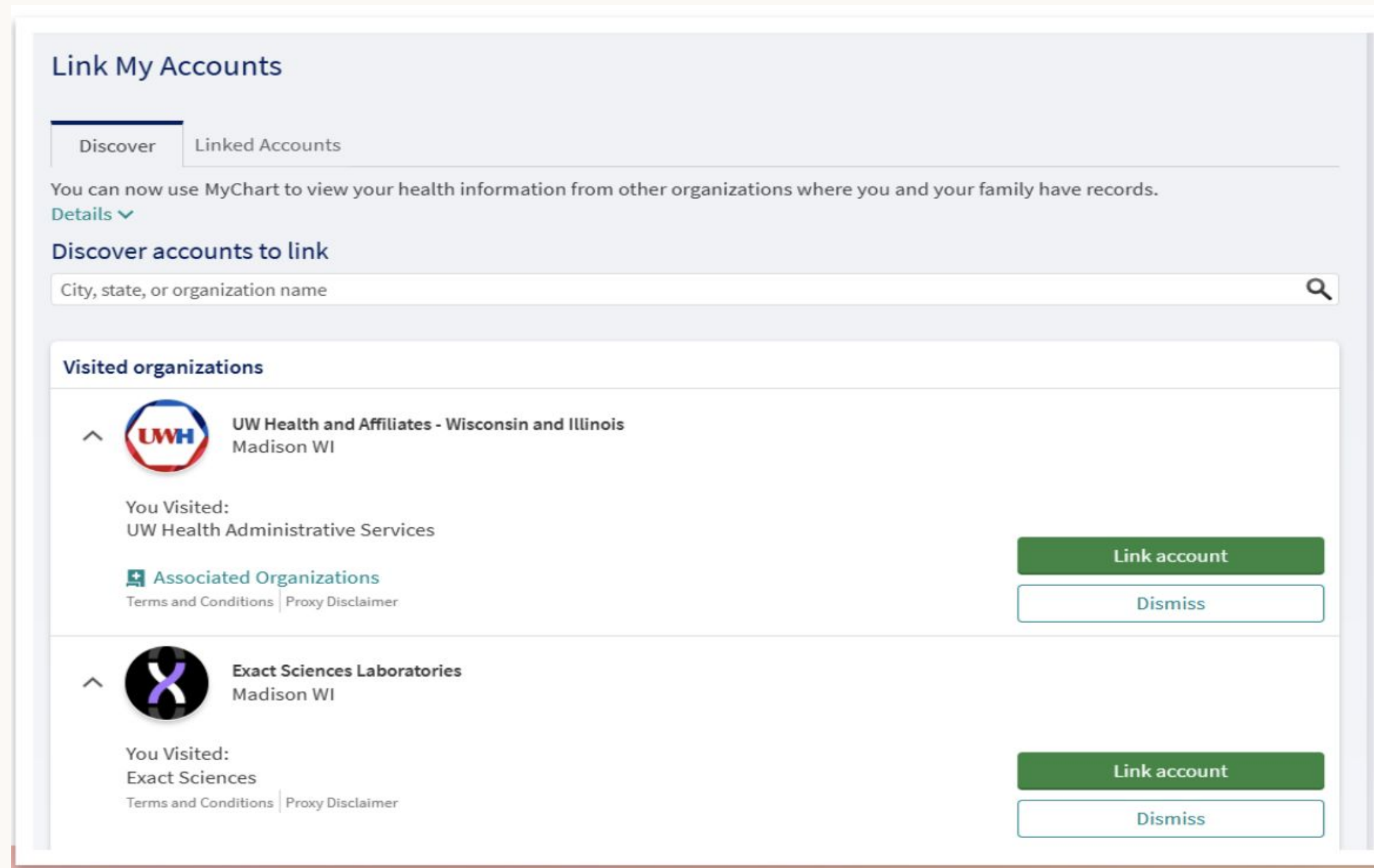
"Portals littered all over"

A common question, and a fair one

A primary care doctor. A specialist. A hospital. An eye clinic. Each one hands out its own separate login.

Portals on the same platform can connect

Within MyChart, records from several organizations can appear together

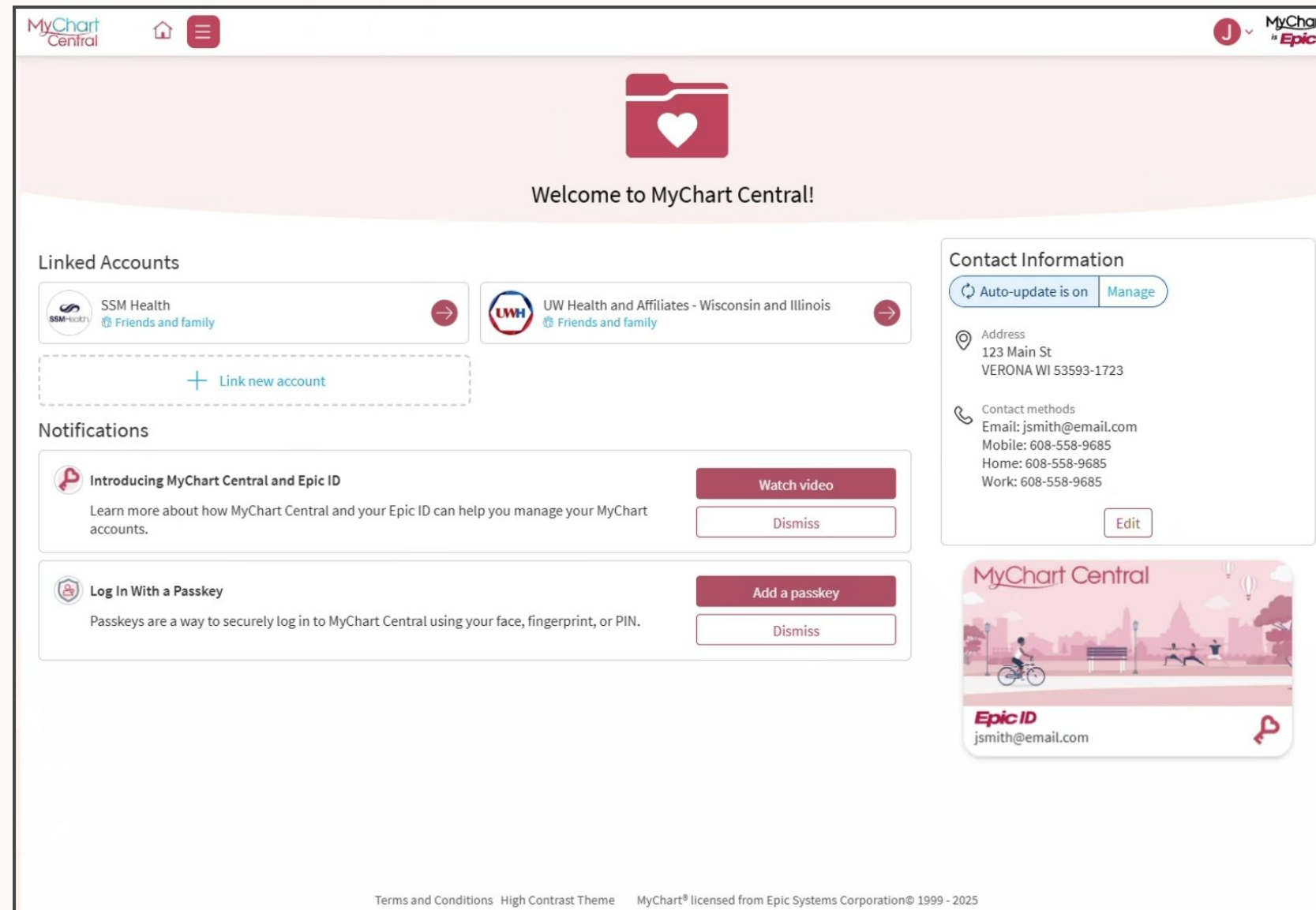


What that looks like

- Sign in to one MyChart account
- Add the other organizations where care happens
- Move between them without a second sign-in

Example from an Epic MyChart account. Layouts and available features differ by health system.

One sign-in across organizations



Linking accounts

- Seeing records from several organizations in one place

One sign-in

- A single username and password across those organizations

These are two different features, and they are easy to mix up. One combines records, the other combines logins.

Example from an Epic MyChart account. Layouts and available features differ by health system.

And some of them never will

Connecting accounts this way is largely a MyChart capability. A practice on a different platform generally means a separate login, with no way to combine the two.

What works instead

- Download a records copy from that portal directly
- Share it with the other doctor, or bring it to the visit

Nobody has to do this alone

Caregiving runs in both directions

Helping someone

A spouse, a parent, a loved one

Being helped

An adult child, a sibling, a friend

Both at once

Which is where many people actually
are

Do not share passwords. Grant access.

A common instinct, and there is a safer way to do it

- Sharing a password increases the risk of exposure
- Granted access can be seen, changed, and revoked at any time
- Look for Sharing Hub, Friends and Family Access, or Share My Record

Access can be revoked at any time, without changing the password.

Getting access to someone else's records

- They send an invitation from their portal, or a form is required
- Each adult needs a separate account. Spouses cannot share one
- That catches people out, and it is a privacy protection, not an obstacle

The VA works differently

- No online proxy at all. Paper form through your local Release of Information office

Quick answers

Common questions, briefly

1

Changing doctors or health systems?

Records stay in the old portal. Download a copy before moving on

2

Traveling?

A portal works anywhere there is an internet connection

3

No activation code, and no primary doctor yet?

Online signup with identity questions is usually still available

Getting an account

Four ways in

- Front desk staff sign you up during a visit
- A code by text or email after a visit
- A code printed on your After Visit Summary
- Online signup with identity questions

Have these ready

- An email account that can be opened right now
- A phone nearby, for a verification code
- Date of birth
- Insurance card or medical record number

Names and addresses must match what the doctor's office has on file. A mismatch is the most common reason signup fails.

If you are locked out

1

Try Forgot username first, then Forgot password

It is usually the username that is wrong, not the password

2

Still stuck? Call the help line on the handout

They can reset it and help you while on the phone

3

Not signed in for years?

Accounts can close for inactivity. Ask them to start a new one

This week, do one thing

Sign in once and complete a single task.

Check a result. Send a message. Request a refill.

POLL 4

After today, how confident do you feel about using your patient portal?

- ☐ Much more confident
- ☐ Somewhat more confident
- ☐ About the same
- ☐ Still unsure where to start
- ☐ I was already comfortable before today

Thank you

Find out more

- live-gold.org
- Full NC portal reference
- Free workshops across North Carolina

Watching the recording?

- Questions are welcome any time
- RJ Reyes, rj.reyes@live-gold.org

Portions adapted from MyChart eLearning, Epic Systems Corporation. Portal details verified August 2026.