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Welcome to Ontada Health

The Ontada Health patient portal allows you to keep track of your doctor visits, view test results, review past and current medications, review and schedule appointments, and send direct messages to your care team.

Registering for an Ontada Health account means no longer waiting for office hours or phone calls to have issues resolved and questions answered.

Access Ontada Health using a desktop machine, tablet, or mobile phone without having to download a separate app. Follow the instructions below to create your account and take advantage of all available features.

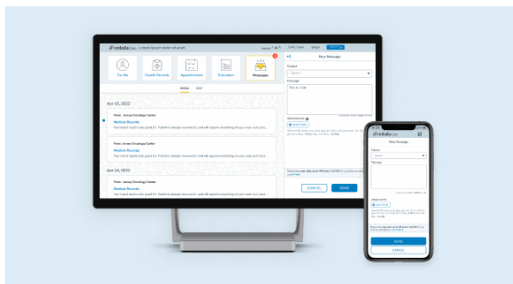
Creating an account

You will receive an email to join Ontada Health. Click the **Set Up Account** button (callout 1) to get started.



Secure and convenient access to your health information

Your care team uses the Ontada Health patient portal to securely share lab results, messages, and more.

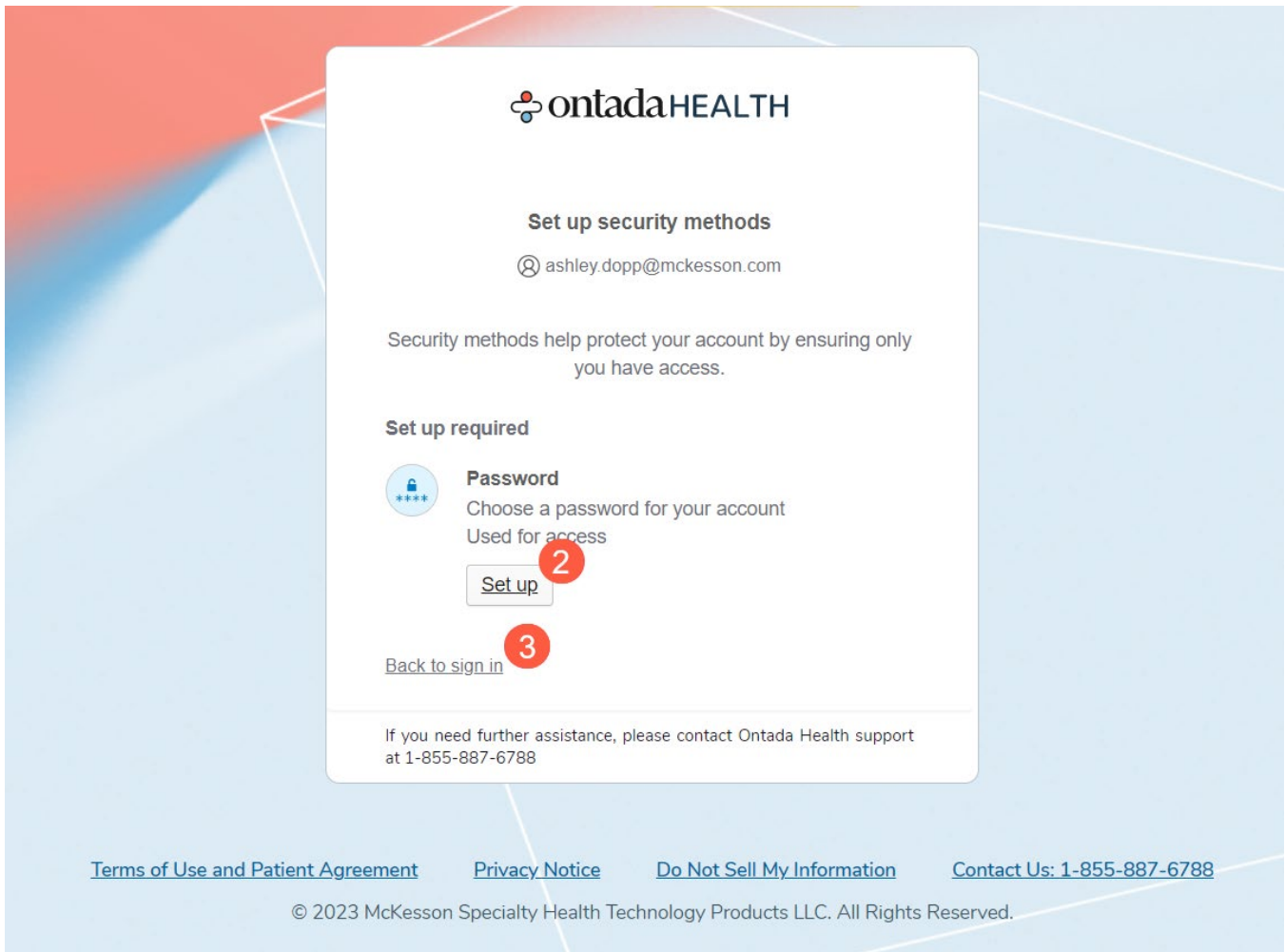


Please set up your account before this invitation expires on Saturday, May 13, 2023 at 8:52:09 PM Coordinated Universal Time.

1
Set Up Account

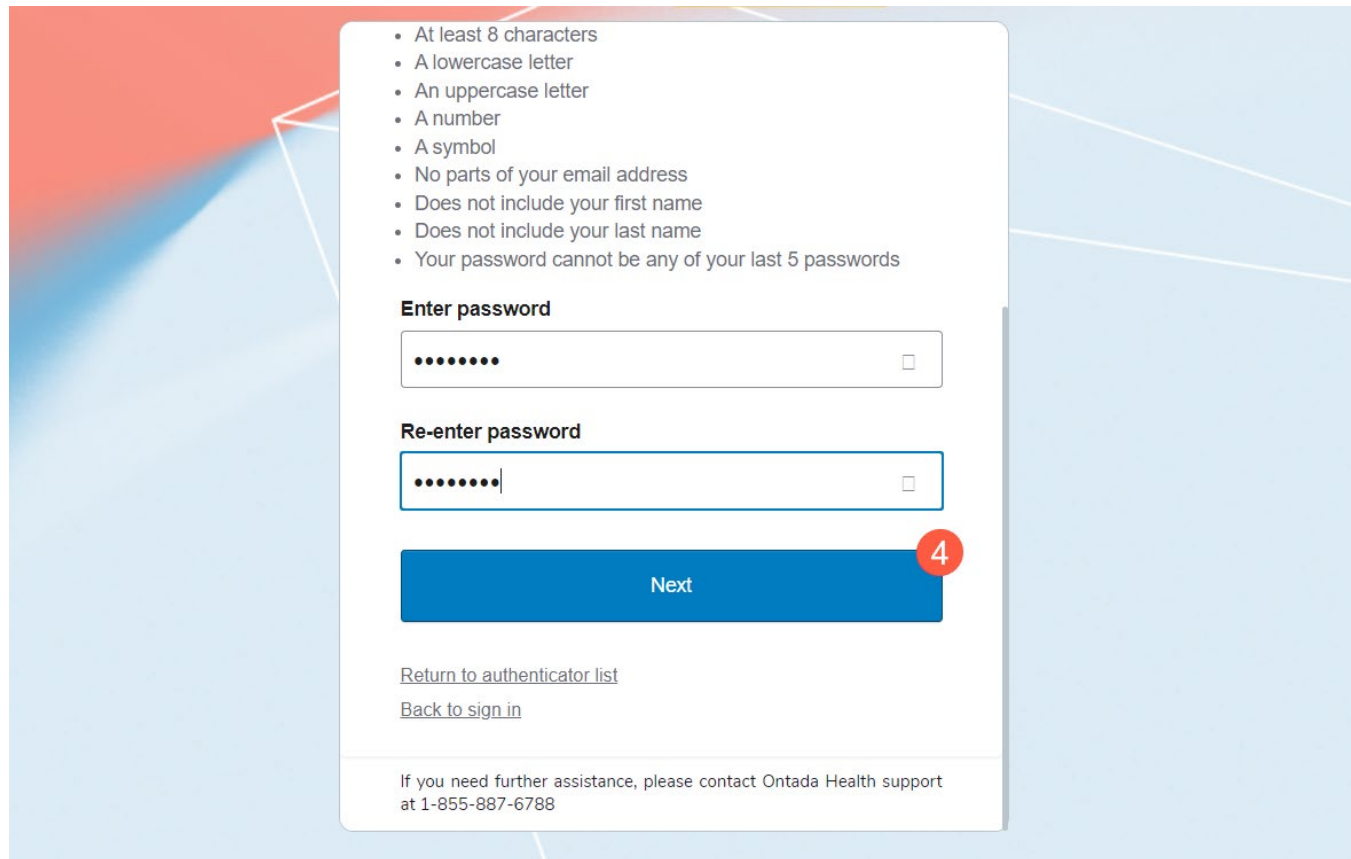
If you need help, please call Ontada Health's support team at 800-333-4444.

The first thing you'll be asked to do is create a password. Click **Set Up** (callout 2) to choose a password or click **Back to sign in** (callout 3) if you already created one.



Follow the password requirements to create an 8-character password with a lowercase letter, an uppercase letter, a number, a number, and a symbol.

Once you've met the password requirements, click the **Next** button (callout 4).



The screenshot shows a password creation interface. A white callout box with a red border and a red circle containing the number '4' points to the 'Next' button. The callout box contains the following text:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your email address
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 5 passwords

Below the list are two password input fields:

Enter password
[Password field with 8 dots and a toggle icon]

Re-enter password
[Password field with 8 dots and a toggle icon]

Next (highlighted with callout 4)

[Return to authenticator list](#)
[Back to sign in](#)

If you need further assistance, please contact Ontada Health support at 1-855-887-6788

On the next step, enter your **Date of Birth** (callout 5) and accept the Terms of Use, Patient Agreement, and Privacy Notice (callout 6). Each document can be opened and read by clicking on them. Click the **Next** button (callout 7) to continue.

ontadaHEALTH
Onc Hem of MSH

Patient Name
Sandra Lee

Not Sandra Lee?
Contact Ontada Health Support (toll free) at 1-855-887-6788

• Required Fields

Date of Birth • 5

12/16/1975

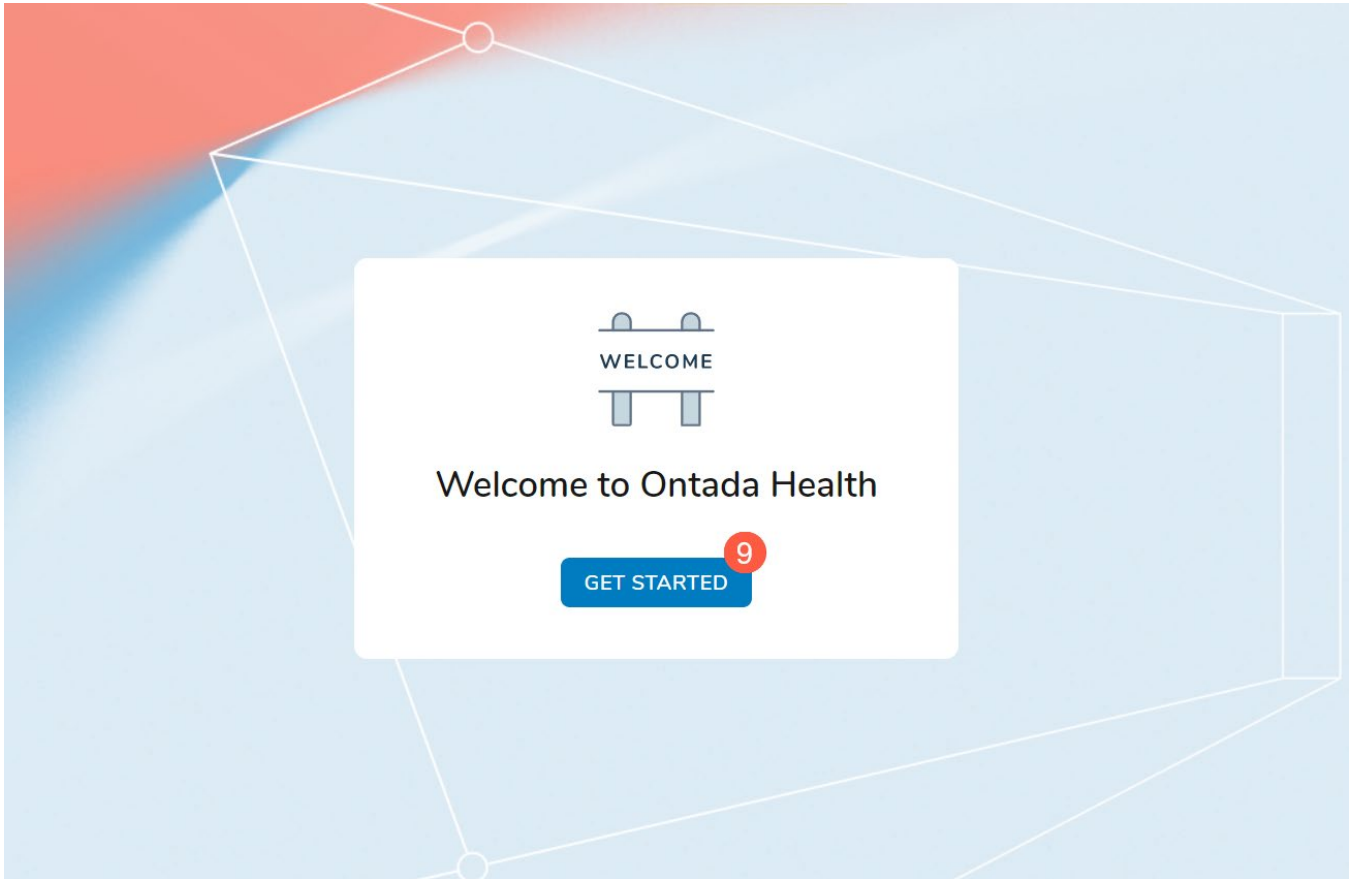
6 I have read and agree to the [Terms of Use](#), [Patient Agreement](#) and [Privacy Notice](#) •

7
NEXT

[Terms of Use and Patient Agreement](#)
 [Privacy Notice](#)
 [Do Not Sell My Information](#)
 [Contact Us: 1-855-887-6788](#)

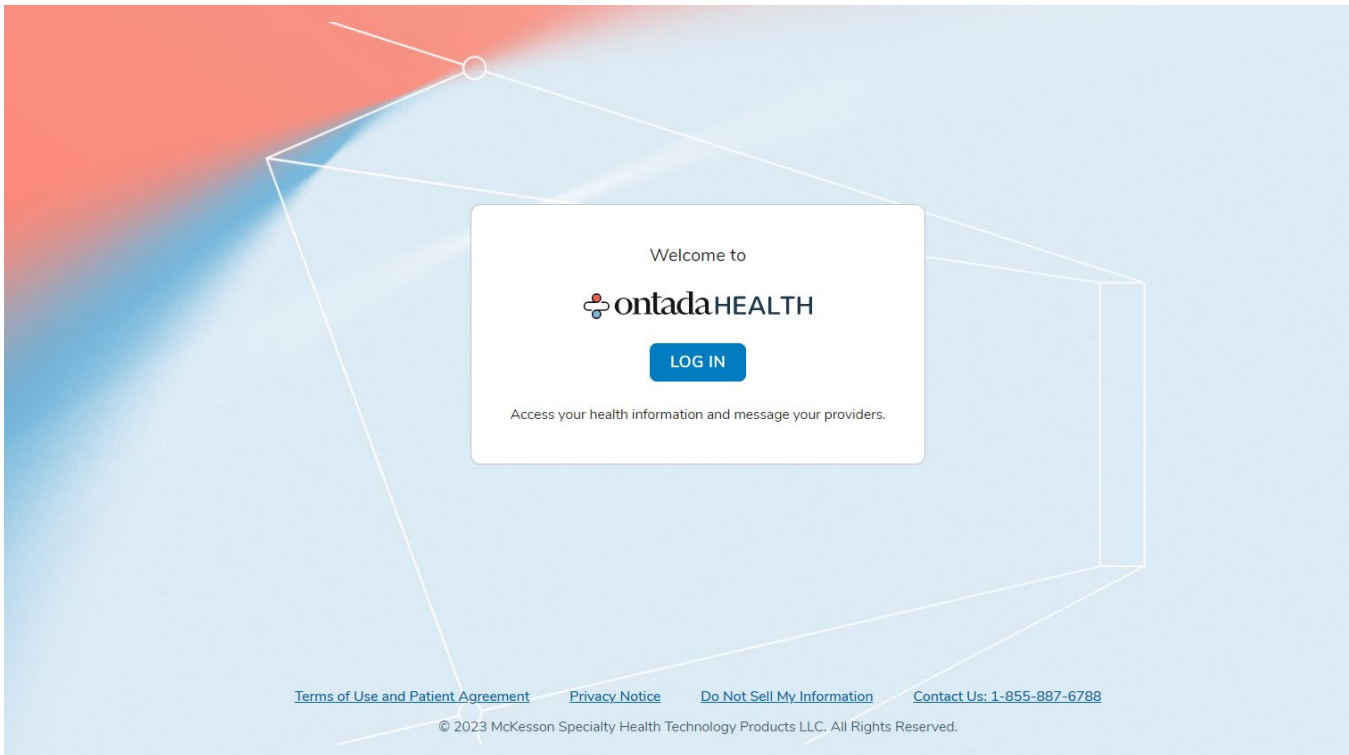
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Upon clicking the button, you will see the Ontada Health welcome screen. Click **Get Started** (callout 9) to access the portal.



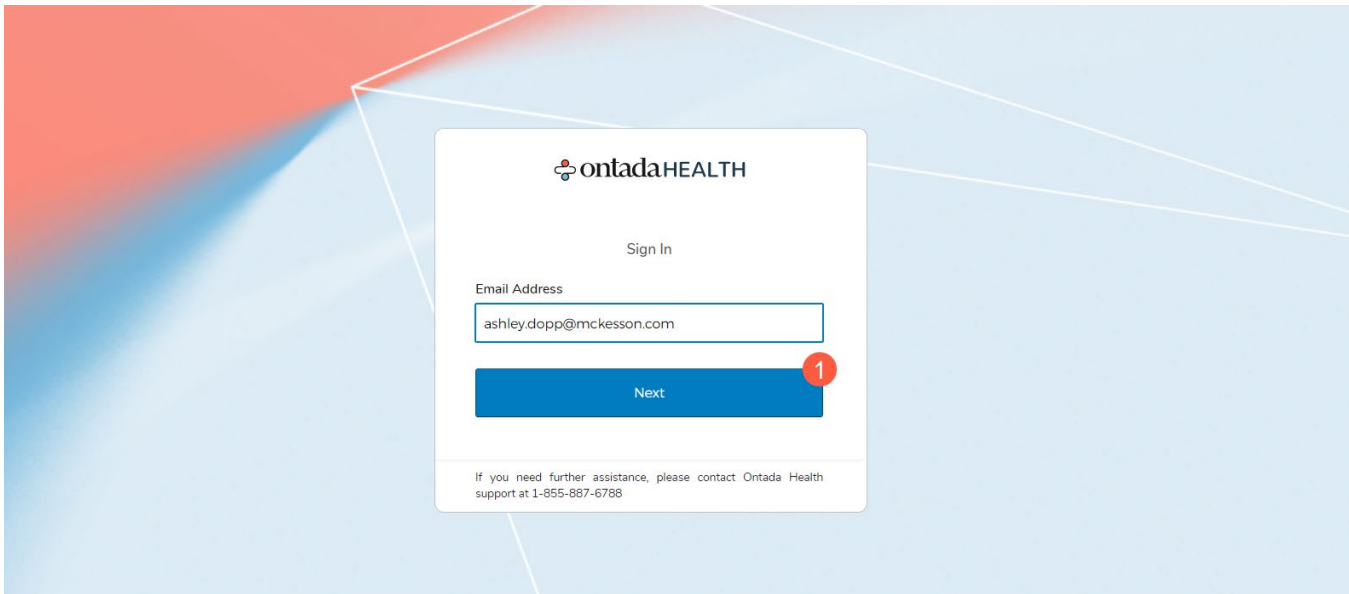
Logging in

Anytime you wish to return to Ontada Health to access your personal health information, visit <https://www.ontadahealth.com/> to log in using your email address and password.

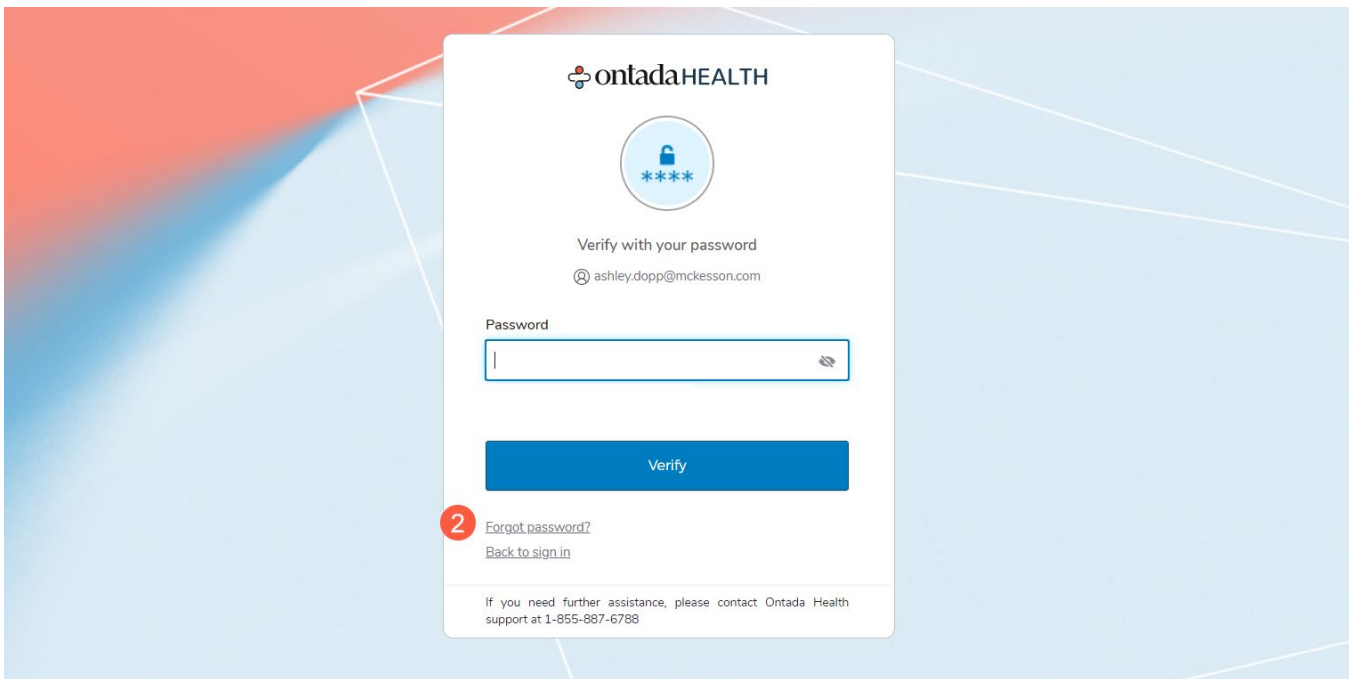


Resetting your password

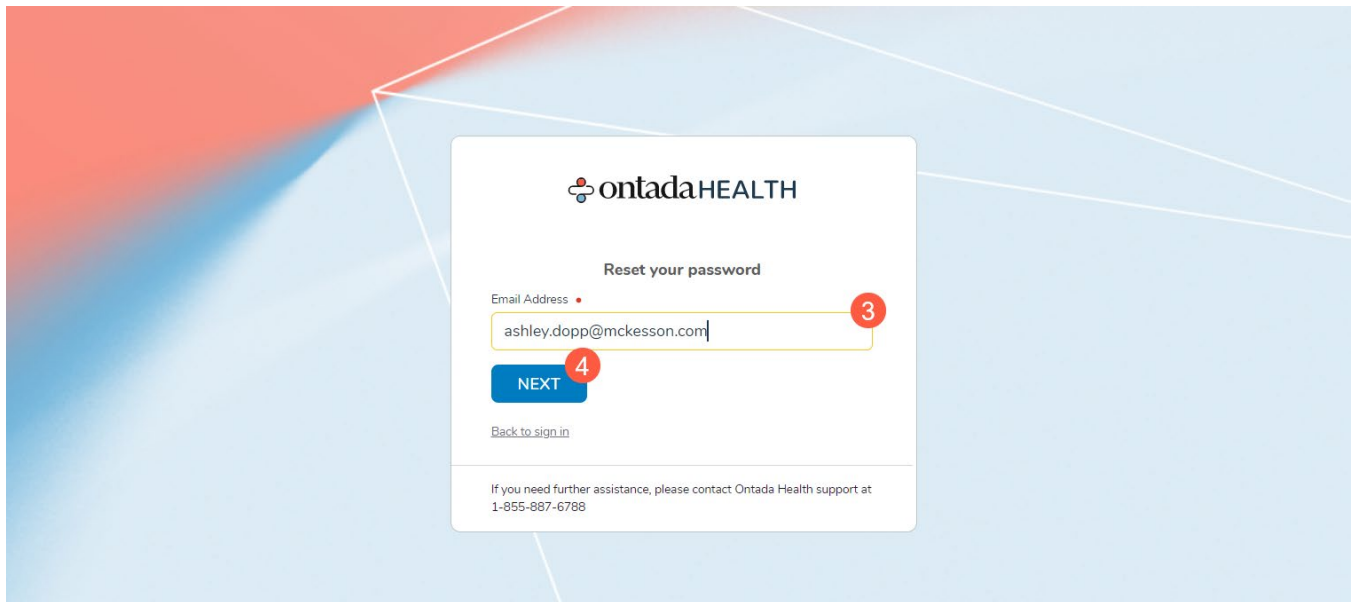
If at any time you forget your password, you can reset it through the login page. After clicking the Log In button, enter your email address and click **Next** (callout 1).



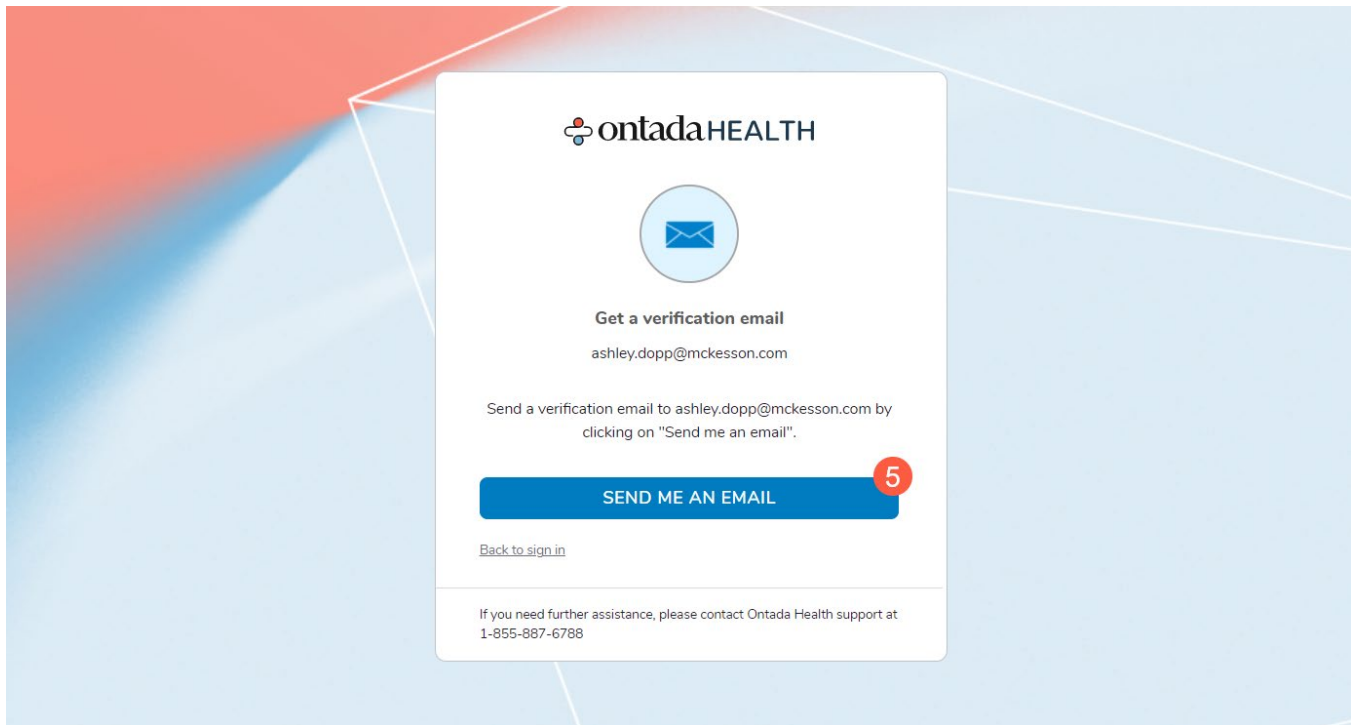
On the next page, click the **Forgot Password** link (callout 2).



Enter the email address you used to create your account (callout 3) and click the **Next** button (callout 4).



To confirm your identity, Ontada Health must send you an email with a verification code. Click the **Send Me an Email** button (callout 5) to receive your verification code.



You will receive an email with a six-digit code. You have two options from here:

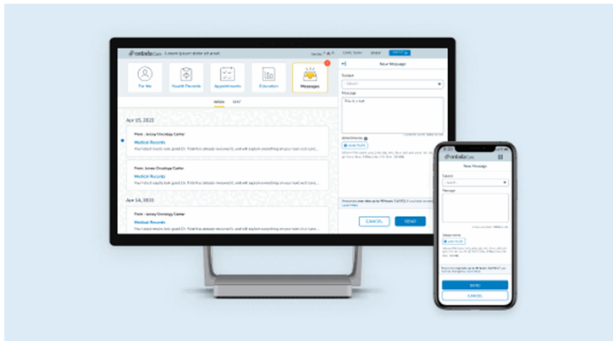
1. You may click the **Reset Password** button in the email (callout 6) and use the code to continue resetting your password.



You Asked to Reset Your Ontada Health Password

We received your password reset request. Please select the button below to create a new password:

Access Code: 229793

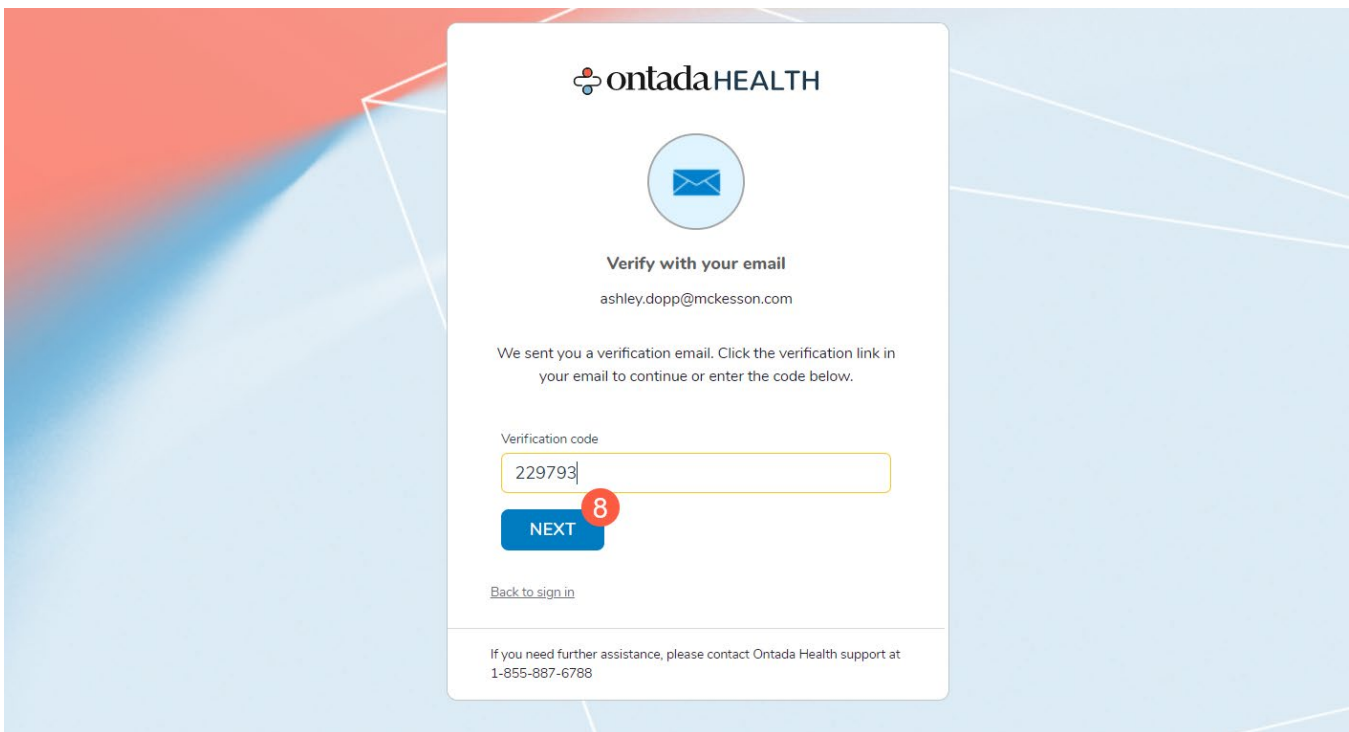
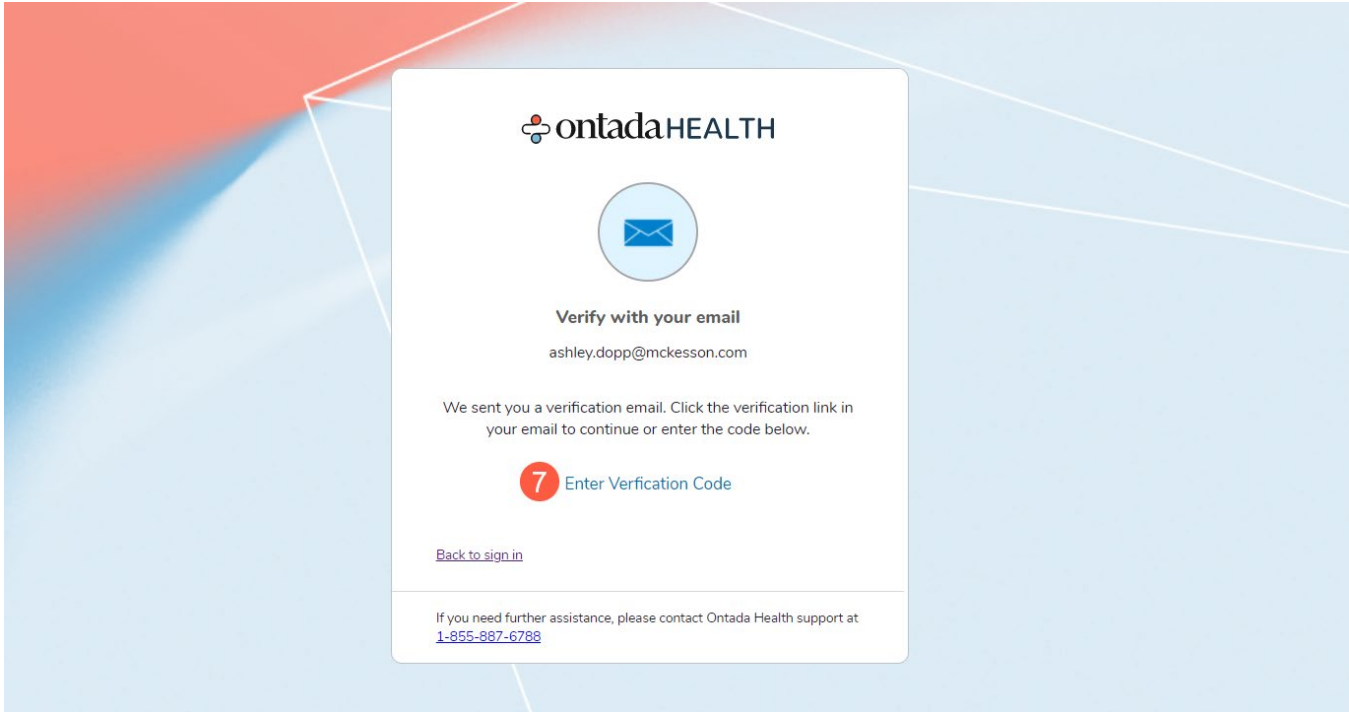


If you did not request to reset your password, you can ignore this email.



If you need help, please call Ontada Health's support team at 855-887-6788.

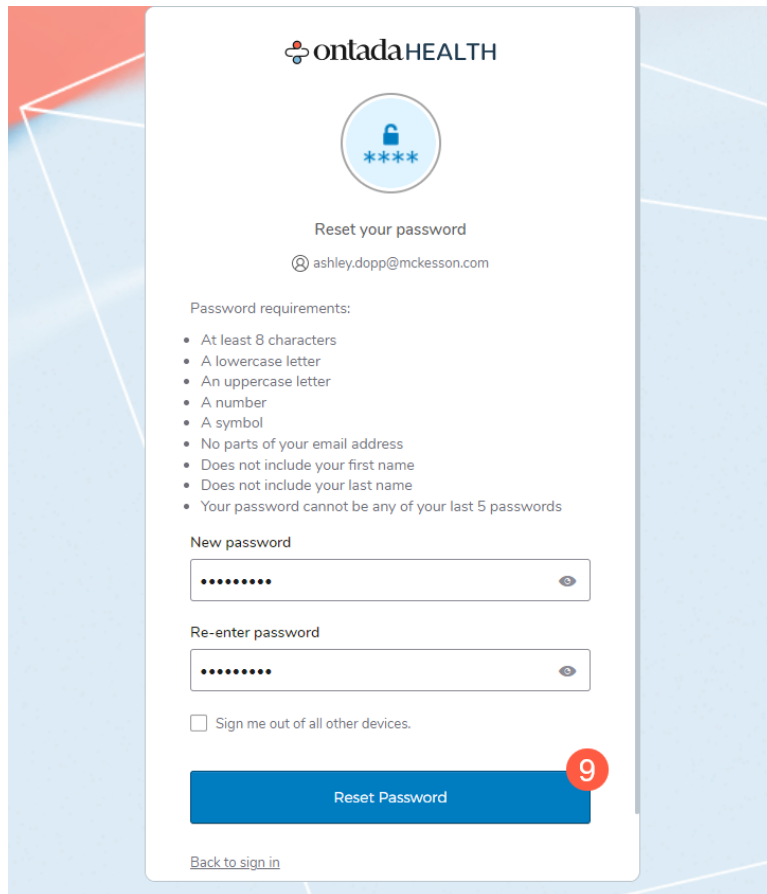
2. Or you may copy the verification code and return to the Ontada Health site and click **Enter Verification Code** (callout 7). On the next page, type or paste in the code and click the **Next** button (callout 8).



Either option will route you to the page where you can reset your password. Follow the password requirements to create an 8-character password with a lowercase letter, an uppercase letter, a number, a number, and a symbol.

Once you've met the password requirements, click the **Reset Password** button (callout 9).

This will sign you into Ontada Health with your new password and take you to the For Me page.



For Me Page

The **For Me** page is your homepage. This is where you can see a quick overview of appointments, test results, messages, and more.

You can use this page to take action, such as requesting a new appointment, or use the menu (callout 1) or each separate icon across the top navigation (callouts 2-6) to view more details.

You can also send a message to your care team by clicking the **Send a Message** button (callout 7). This button will be visible throughout Ontada Health so that you may send a message at any time.

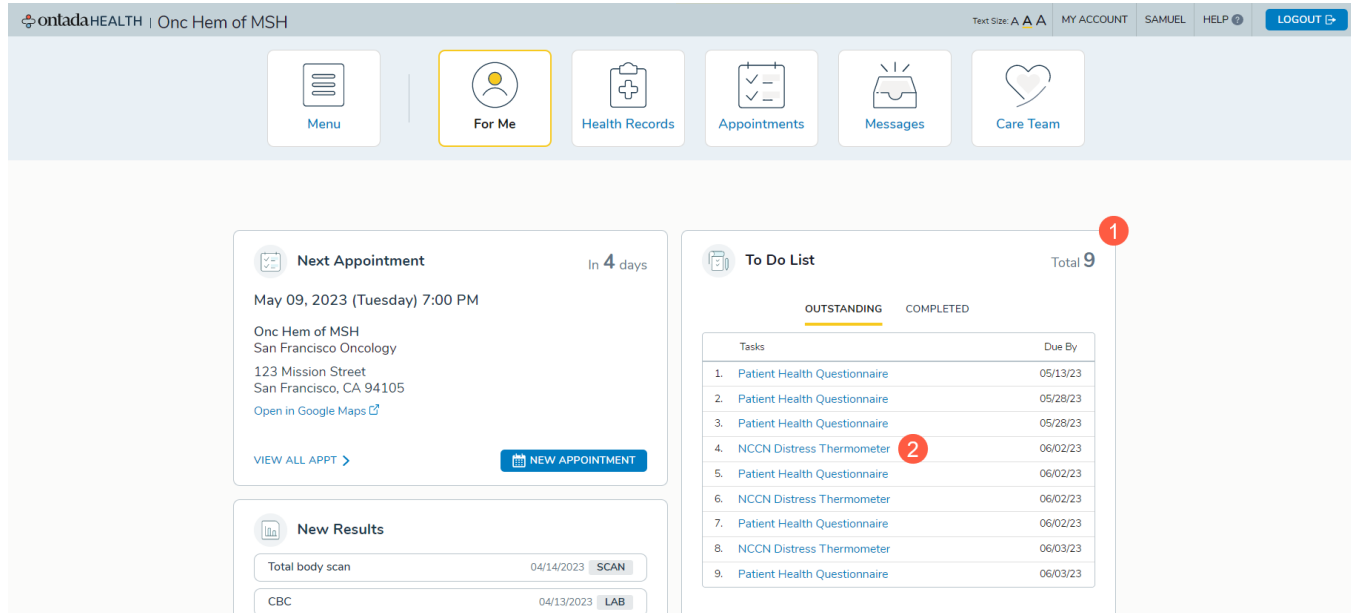
The screenshot shows the 'For Me' page interface. At the top, there is a navigation bar with the following elements: 'ontadaHEALTH | Alpha Oncology', 'Text Size: A A', 'MY ACCOUNT', 'HEALTH', 'HELP', and a 'LOGOUT' button. Below this is a top navigation bar with six icons: 'Menu' (callout 1), 'For Me' (callout 2, highlighted with a yellow border), 'Health Records' (callout 3), 'Appointments' (callout 4), 'Messages' (callout 5), and 'Care Team' (callout 6). The main content area is titled 'HELLO HEALTH' and contains three primary sections: 'Next Appointment' (showing 'No upcoming appointments' and a 'NEW APPOINTMENT' button), 'New Results' (listing 'Bone scan, total body' and 'Lab Other' with dates and 'SCAN'/'LAB' buttons), and 'To Do List' (showing 'Total 335' tasks, with 'OUTSTANDING' and 'COMPLETED' filters). The 'To Do List' table is as follows:

Tasks	Due By
1. TxO Patient Pain and Fatigue Self Assessment V1.0	04/25/23
2. TxO Review of Systems V1.0	04/25/23
3. TxO Patient Pain and Fatigue Self Assessment V1.0	04/25/23
4. TxO Patient Pain and Fatigue Self Assessment V1.0	04/25/23
5. NCCN - Regression V2.12	04/29/23
6. TxO Patient Pain and Fatigue Self Assessment V1.0	04/30/23
7. TxO Past Medical HX V1.0	04/30/23
8. TxO Patient Information V2.0	04/30/23
9. TxO Patient Information V2.0	04/30/23
10. TxO Patient Information V3.0	04/30/23

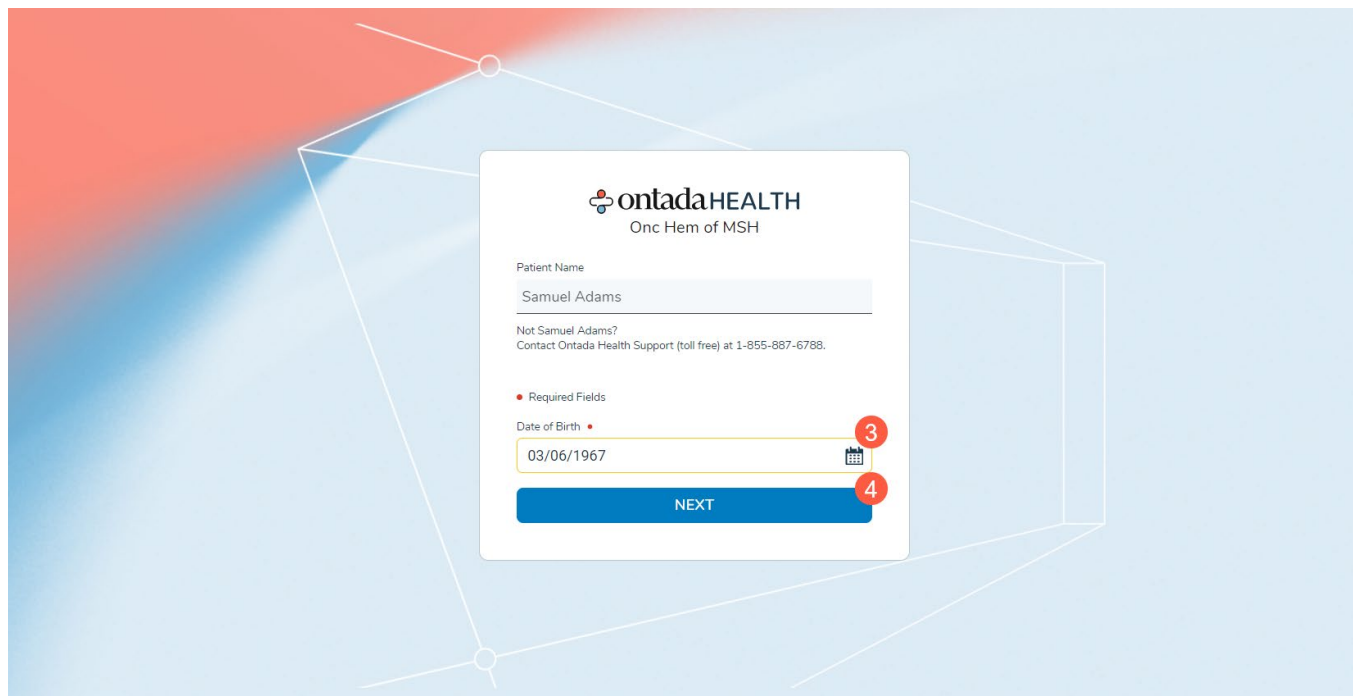
At the bottom right of the page, there is a 'SEND A MESSAGE' button (callout 7).

To Do List

If your doctor requires you to take any actions regarding your care, those tasks will be listed under your **To Do List** (callout 1). To complete the task, click on the name of the task (callout 2).



This will open a new window where you must verify your identity. Enter your **Date of Birth** and click the **Next** button (callouts 3 and 4).



On your **Assigned Forms** page, you will see a list of forms you must complete under the **Outstanding** page (callout 5). Any forms you already completed will appear under the **Completed** page (callout 6).

To complete a form, click on the **Start** button (callout 7).

ontadaHEALTH | Onc Hem of MSH Text Size: A A A Samuel Adams

Assigned Forms
Total **9**

This information is being requested by your care team to create a tailored plan of care for you throughout your journey. All information provided will be securely and privately sent to your care team.

Instructions:
Please complete each form by the specified due date. Any unfinished forms may need to be completed during your next office visit. Once a form has been completed, you will receive an email at to access the completed form for your records.

5
6

OUTSTANDING
COMPLETED

Form	Date Sent	Due By	Status	Actions
1. Patient Health Questionnaire	04/27/23	05/13/23	NEW	START
2. Patient Health Questionnaire	04/28/23	05/28/23	NEW	START
3. Patient Health Questionnaire	04/28/23	05/28/23	NEW	START
4. NCCN Distress Thermometer	05/03/23	06/02/23	NEW	START 7
5. Patient Health Questionnaire	05/03/23	06/02/23	NEW	START
6. NCCN Distress Thermometer	05/03/23	06/02/23	NEW	START
7. Patient Health Questionnaire	05/03/23	06/02/23	NEW	START
8. NCCN Distress Thermometer	05/04/23	06/03/23	NEW	START
9. Patient Health Questionnaire	05/04/23	06/03/23	NEW	START

Complete each page of the form then click the **Next** button (callout 8). To go back to your Assigned Forms page at any time, click the link in the top left corner of the page (callout 9).

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< Back to Assigned Forms List
9

Patient Health Information - NCCN

Step - 1 of 4

NCCN DISTRESS THERMOMETER
Distress is an unpleasant experience of a mental, physical, social, or spiritual nature. It can affect the way you think, feel, or act. Distress may make it harder to cope with having cancer, its symptoms, or its treatment

INSTRUCTIONS: Please click the number (0-10) that best describes how much distress you have been experiencing in the past week, including today.

10

9

8

7

6

5

4

3

2

1

0

Referenced with permission from the NCCN Clinical Practice Guidelines in Oncology (NCCN Guidelines®) for Distress Management V.2.2022. © National Comprehensive Cancer Network, Inc. 2023. All rights reserved. Accessed 01/23/2023. To view the most recent and complete version of the guideline, go online to NCCN.org. NCCN makes no warranties of any kind whatsoever regarding their content, use or application and disclaims any responsibility for their application or use in any way.

NEXT **8**

After you complete all pages in the form, you will be returned to your Assigned Forms page and see a success message at the top (callout 10).

ontadaHEALTH | Onc Hem of MSH Text Size: A A A Samuel Adams

Assigned Forms Total 8

✔ You have successfully submitted the 'NCCN Distress Thermometer' form 10

This information is being requested by your care team to create a tailored plan of care for you throughout your journey. All information provided will be securely and privately sent to your care team.

Instructions:
Please complete each form by the specified due date. Any unfinished forms may need to be completed during your next office visit. Once a form has been completed, you will receive an email at samuel.adams@yopmail.com to access the completed form for your records.


OUTSTANDING COMPLETED


Form	Date Sent	Due By	Status	Actions
1. Patient Health Questionnaire	04/27/23	05/13/23	NEW	START
2. Patient Health Questionnaire	04/28/23	05/28/23	NEW	START
3. Patient Health Questionnaire	04/28/23	05/28/23	NEW	START
4. Patient Health Questionnaire	05/03/23	06/02/23	NEW	START
5. NCCN Distress Thermometer	05/03/23	06/02/23	NEW	START
6. Patient Health Questionnaire	05/03/23	06/02/23	NEW	START
7. NCCN Distress Thermometer	05/04/23	06/03/23	NEW	START
8. Patient Health Questionnaire	05/04/23	06/03/23	NEW	START


Health Records Page


Use this page to review your conditions, results, medications, clinical notes, devices, and allergies. Simply click on each page (callouts 1-6) to access each category.


ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT



Menu


For Me


Health Records


Appointments


Messages


Care Team

CONDITIONS
RESULTS
MEDICATIONS
CLINICAL NOTES
DEVICES
ALLERGIES

Conditions PRINT / DOWNLOAD

Primary conditions

▼

Breast cancer, female

Secondary conditions

- ▼

Estrogen receptor negative status [ER-]

Conditions

The Conditions page lists all your diagnoses. To see more details regarding each condition, click the caret icon to expand the area (callout 1).

You may also download and print this information for your records by clicking the **Print/Download** button (callout 2).

Results

The Results page lists your current and past test results. To see details regarding each result, click the caret icon to expand the area (callout 1).

To see test results from a specific time, click the date range icon (callout 2). You may review results from the last 3 months, 3-6 months, 6-9 months, 9-12 months, or more than 12 months prior.

You may also download and print this information for your records by clicking the **Print/Download** button (callout 3).

ontadaHEALTH | Onc Hem of MSH Text Size: A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me **Health Records** Appointments Messages Care Team

CONDITIONS **RESULTS** MEDICATIONS CLINICAL NOTES DEVICES ALLERGIES

Results Showing: Last 3 months **PRINT / DOWNLOAD**

Apr 14, 2023

CBC LAB

Physician review: Not Reviewed
 Interpretation: n/a
 Source: Blood
 Facility: n/a
 Ordering Physician: Fillmore, Seth
 Result Date: 04/14/2023 Lab Visit Date: 04/14/2023

WBC	4500 (x 10 ³ /uL)
RBC	4.7 x 10 ⁶ /uL
RBC, corrected	4.5 x 10 ⁶ /uL
HGB	12.3 g/dL
PLT	300 x 10 ³ /uL
LY %	50 %

Medications

The Medications page lists all your active and inactive treatments, prescriptions, and immunizations. To see details regarding each item, click the caret icon to expand the area (callout 1).

Click **Active** or **Inactive** to toggle between current and past treatments and prescriptions (callout 2).

You may also download and print this information for your records by clicking the **Print/Download** button (callout 3).

The screenshot displays the 'Medications' page in the patient portal. At the top, there is a navigation bar with icons for Menu, For Me, Health Records, Appointments, Messages, and Care Team. Below this is a secondary navigation bar with tabs for CONDITIONS, RESULTS, MEDICATIONS, CLINICAL NOTES, DEVICES, and ALLERGIES. The main content area is titled 'Medications' and features a 'PRINT / DOWNLOAD' button (callout 3). Under the 'Treatment' section, there are 'Active' and 'Inactive' filter buttons (callout 2). A list of medications is shown, with the first entry 'Pembrolizumab (Q21D) + Abraxane (D1,8,15 Q28D) Q84D' highlighted (callout 1). Below this, there is a 'Prescriptions' section with 'Sertraline Oral' and an 'Immunizations' section with 'No immunizations'.

Clinical Notes

The Clinical Notes page lists your current and past chart notes.

Click the date range icon to see notes from a specific time (callout 1). You may review results from the last 3 months, 3-6 months, 6-9 months, 9-12 months, or more than 12 months prior.

You may also download and print this information for your records by clicking the **Print/Download** button (callout 2).

To see details regarding each note, click the caret icon to expand the area (callout 3).

To see the note itself, click the **Preview Note** link (callout 4). This will download a copy of the file to your device as a PDF (callout 5) that you can open and save for your personal records.

ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me **Health Records** Appointments Messages Care Team

CONDITIONS RESULTS MEDICATIONS **CLINICAL NOTES** DEVICES ALLERGIES

Clinical Notes

Showing: Last 3 months 1 PRINT / DOWNLOAD 2

Apr 12, 2023

Follow Up Note AD 3

Author: ZDopp, Ashley
Date of Service: 04/12/2023 Preview Note 4

• Follow Up Note AD v

Follow Up Note AD

5 Follow_Up_Note_A...pdf Show all x

1 / 1 | 100% + | [Icons]

Ashley ZDopp

Patient returning for follow up on 4/25/23. Review CBC and MRI results.

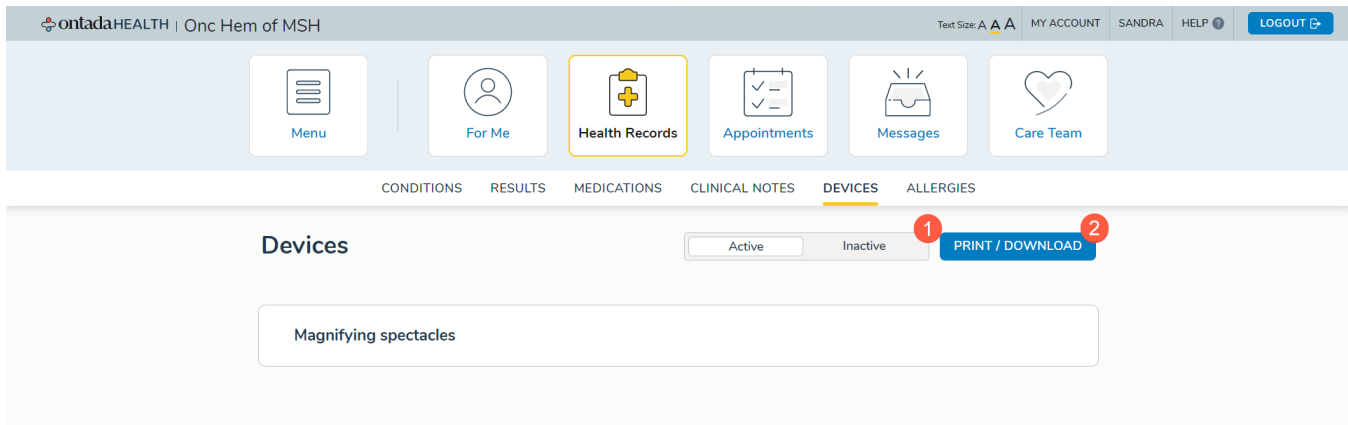
Breast cancer, female (Stage Date: 03/08/2023, Stage IV (Left breast lower-outer quadrant, T1a, pN1mi, cM1, ER Status: Negative)-
Pathological
Date of Dx:03/01/2023) and Estrogen receptor negative status [ER-] (Date of Dx:04/12/2023)

Electronically signed by Ashley ZDopp 04/14/2023 08:12 AM PDT

Devices

The Devices page lists all your medical devices. Click **Active** or **Inactive** to toggle between current and past devices (callout 1).

You may also download and print this information for your records by clicking the **Print/Download** button (callout 2).

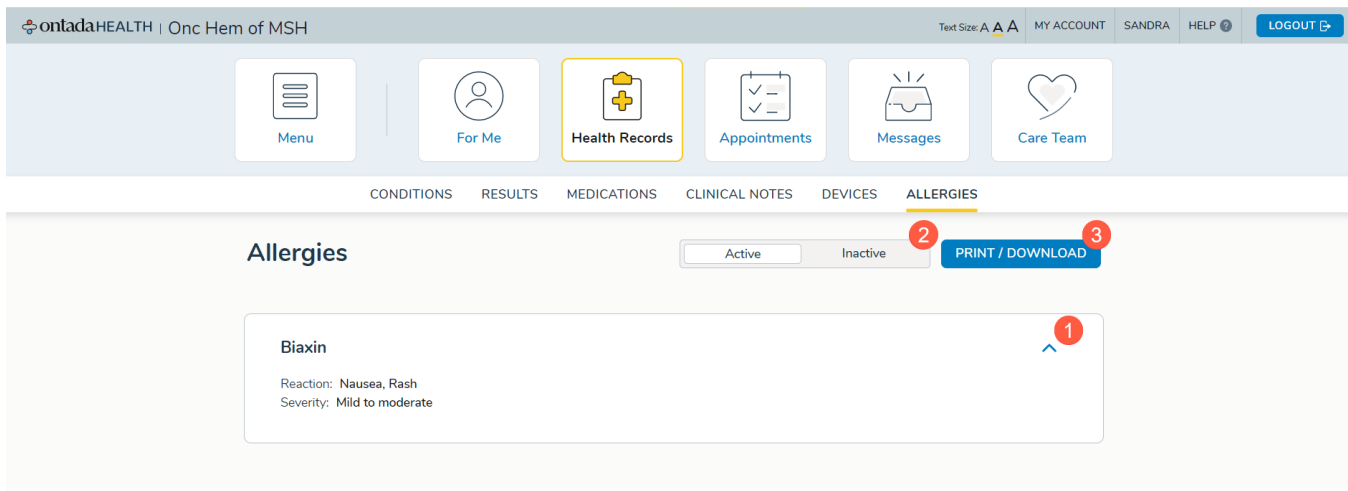


Allergies

The Allergies page lists all your active and inactive allergies. To see details regarding each item, click the caret icon to expand the area (callout 1).

Click **Active** or **Inactive** to toggle between current and past allergies (callout 2).

You may also download and print this information for your records by clicking the **Print/Download** button (callout 3).



Appointments Page

Use this page to review your upcoming appointments and schedule new ones.

Any new appointments or changes to your appointments will be denoted with a visual indicator so that you can keep your schedule up to date.

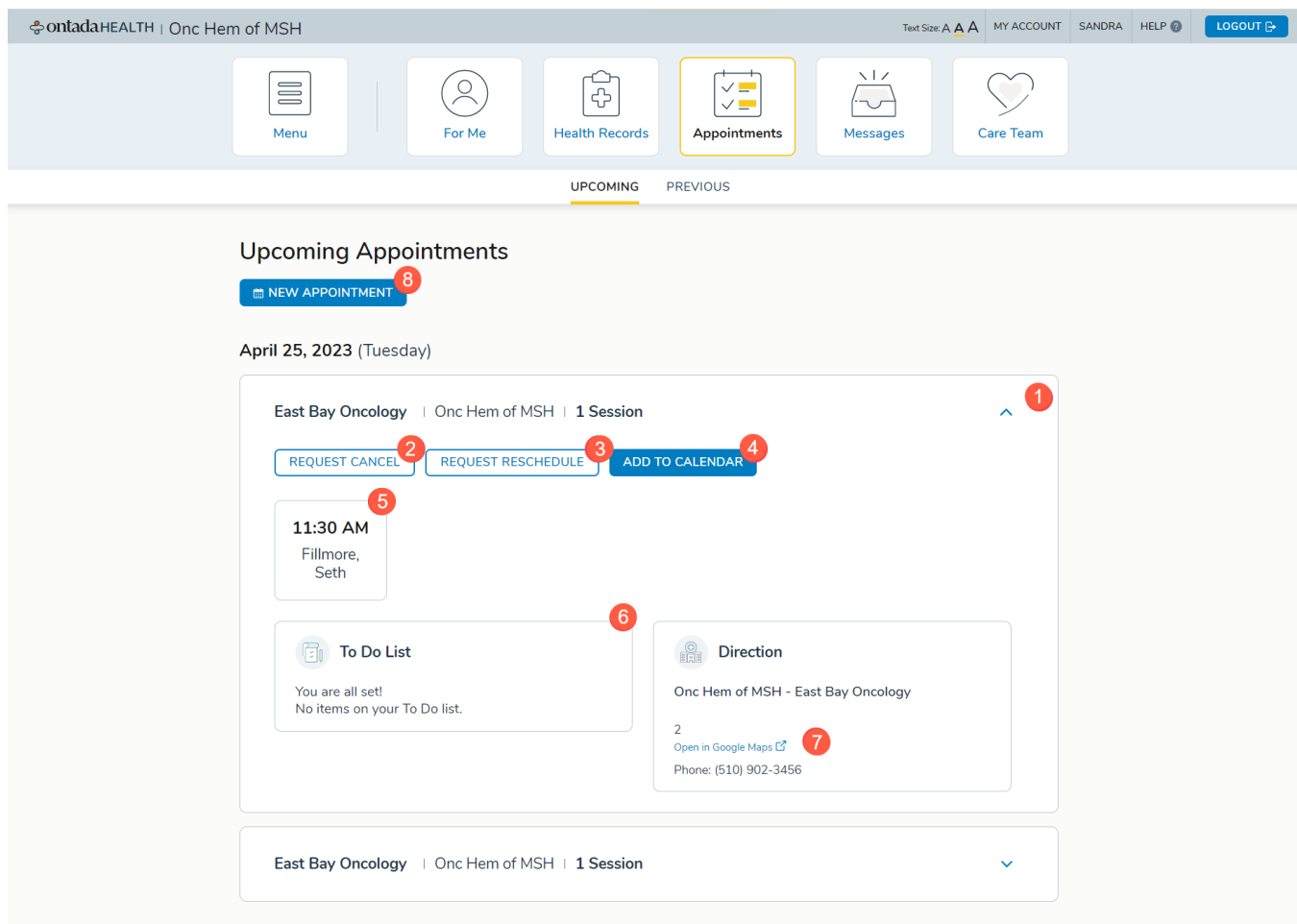
To see details for each appointment, click the caret icon to expand the area (callout 1).

From here you can cancel, reschedule, or create a calendar entry for the appointment (callouts 2-4). You will also see the time of your appointment, and which doctor you will be seeing (callout 5).

If there are any readings or tasks you must complete before your appointment, they will be listed in the **To Do List** (callout 6). This list reflects the same information on the For Me page.

Lastly, you can see the location of your appointment, the office’s contact information, and even get directions to the office by clicking the **Open in Google Maps** link (callout 7).

To schedule a new appointment, click the **New Appointment** button at the top of the page (callout 8).



Scheduling a new appointment

1. Clicking the **New Appointment** button will initiate the process to schedule an appointment.
2. In the first step, choose which doctor you would like to see (callout 1) and then click the **Next** button).

The screenshot shows the 'Request a New Appointment' page. At the top, there is a navigation bar with 'ontadaHEALTH | Onc Hem of MSH' on the left and 'Text Size: A A', 'MY ACCOUNT', 'SANDRA', 'HELP', and 'LOGOUT' on the right. Below this is a menu bar with 'Menu', 'For Me', 'Health Records', 'Appointments' (highlighted with a yellow border), 'Messages', and 'Care Team'. The main heading is 'Request a New Appointment'. A progress indicator at the top shows five steps: Provider (selected), Purpose, Preferred Time, Additional Information, and Submit. The main content area is titled 'Provider to have an appointment with' and is marked as 'Required'. It asks the user to 'Please select one individual you would like to have an appointment with'. There is a 'Select Provider' dropdown menu with 'Seth Fillmore (Medical Oncology)' selected. A red callout bubble with the number '1' points to the dropdown arrow. At the bottom right of the form are 'CANCEL' and 'NEXT' buttons. A footer note states: 'If this is an emergency, call 911. If you require urgent care, contact a member of your care team. Messages are monitored during office hours.'

3. Select a reason for the appointment using the **Select Purpose** drop-down (callout 2) and then click the **Next** button.

The screenshot shows the 'Request a New Appointment' page at the 'Purpose' step. The progress indicator at the top shows 'Provider' as completed (with a green checkmark) and 'Purpose' as the current step. The main content area is titled 'Purpose of the appointment request' and is marked as 'Required'. It asks the user to 'Please select one option that explains your purpose for requesting this appointment'. There is a 'Select Purpose' dropdown menu with 'Follow-Up' selected. A red callout bubble with the number '2' points to the dropdown arrow. At the bottom left of the form is a '< BACK' button, and at the bottom right are 'CANCEL' and 'NEXT' buttons. A footer note states: 'If this is an emergency, call 911. If you require urgent care, contact a member of your care team. Messages are monitored during office hours.'

- Choose your preferred time for the appointment. You may choose the **Next Available Date** (callout 3) or choose a date range (callout 4). For either option, you must also select a preferred time (callout 5). Click the **Next** button to continue.

ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me Health Records **Appointments** Messages Care Team

Request a New Appointment

✔ Provider
 ✔ Purpose
 ● Preferred Time
 ● Additional Information
 ● Submit

Preferred Date & Time • Required

Select Date •

You will be scheduled in the next available date. Please select a date range for each appointment if you have specific dates in mind. The clinic will schedule you in one of the dates you provided.

3 **Next Available Date (Default)**

4 From To

5 **Select Time**

Morning Afternoon

[← BACK](#) [CANCEL](#) [NEXT](#)

If this is an emergency, call 911. If you require urgent care, contact a member of your care team. Messages are monitored during office hours.

- At this time, you may choose to enter any additional information regarding your appointment in the **Reason** text box (callout 6). Click the **Next** button to continue.

ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me Health Records **Appointments** Messages Care Team

Request a New Appointment

✔ Provider
 ✔ Purpose
 ✔ Preferred Time
 ● Additional Information
 ● Submit

Reason • Required

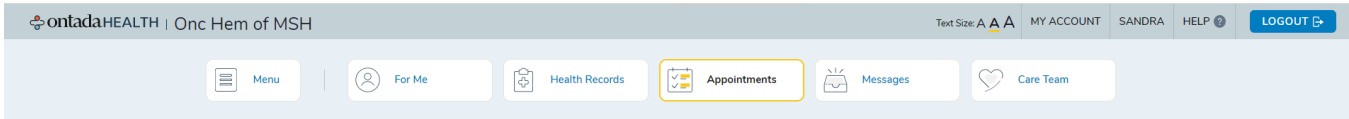
6

Maximum 5,000 Characters (31/5000)

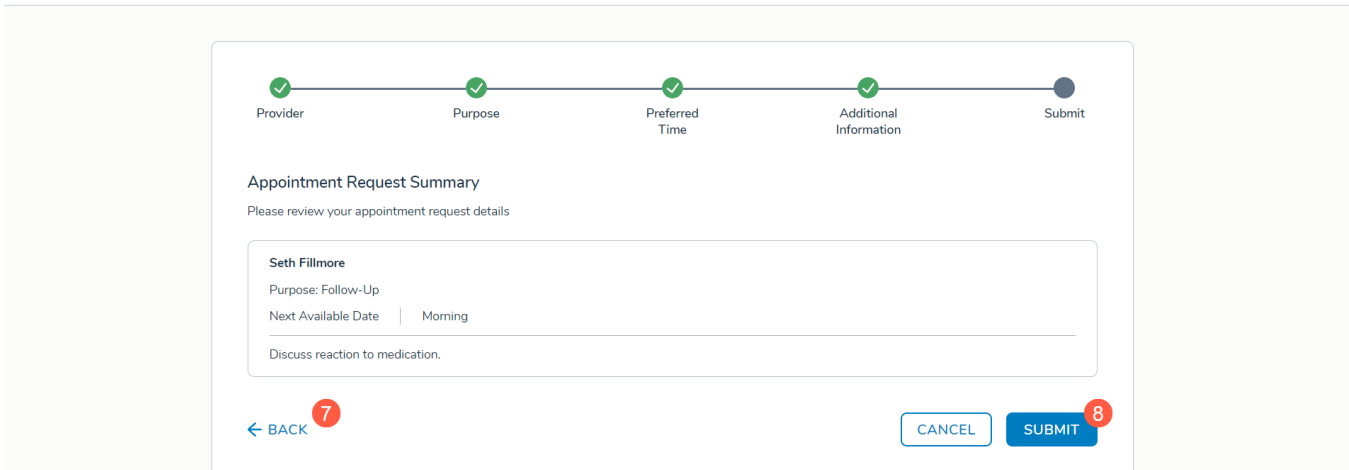
[← BACK](#) [CANCEL](#) [NEXT](#)

If this is an emergency, call 911. If you require urgent care, contact a member of your care team. Messages are monitored during office hours.

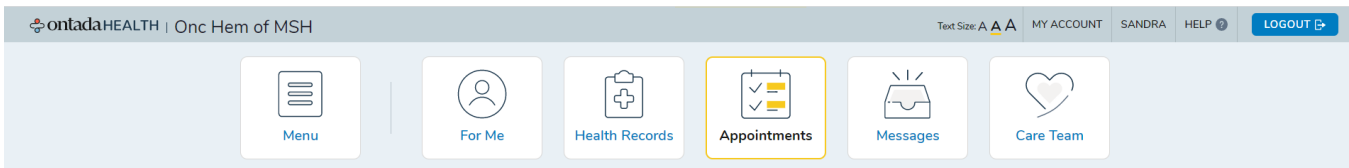
- On the last step, review all the information entered for the appointment. If you need to make changes use the option to go **Back**. If everything looks correct, click the **Submit** button.



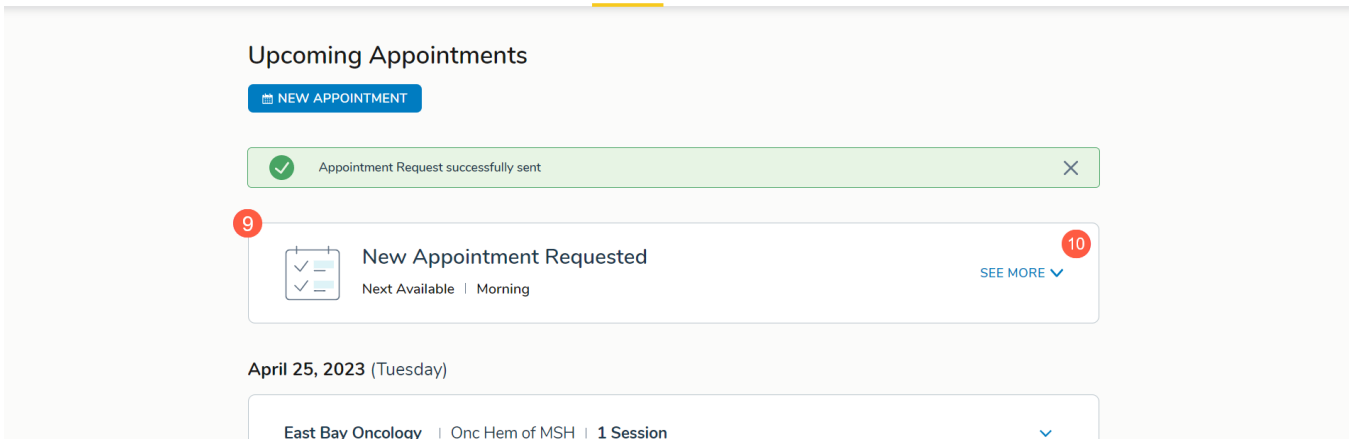
Request a New Appointment



- Your appointment request will be shown on the Appointments page above your already-scheduled upcoming appointments (callout 9). Use the caret icon to view the details of your request (callout 10).



UPCOMING PREVIOUS

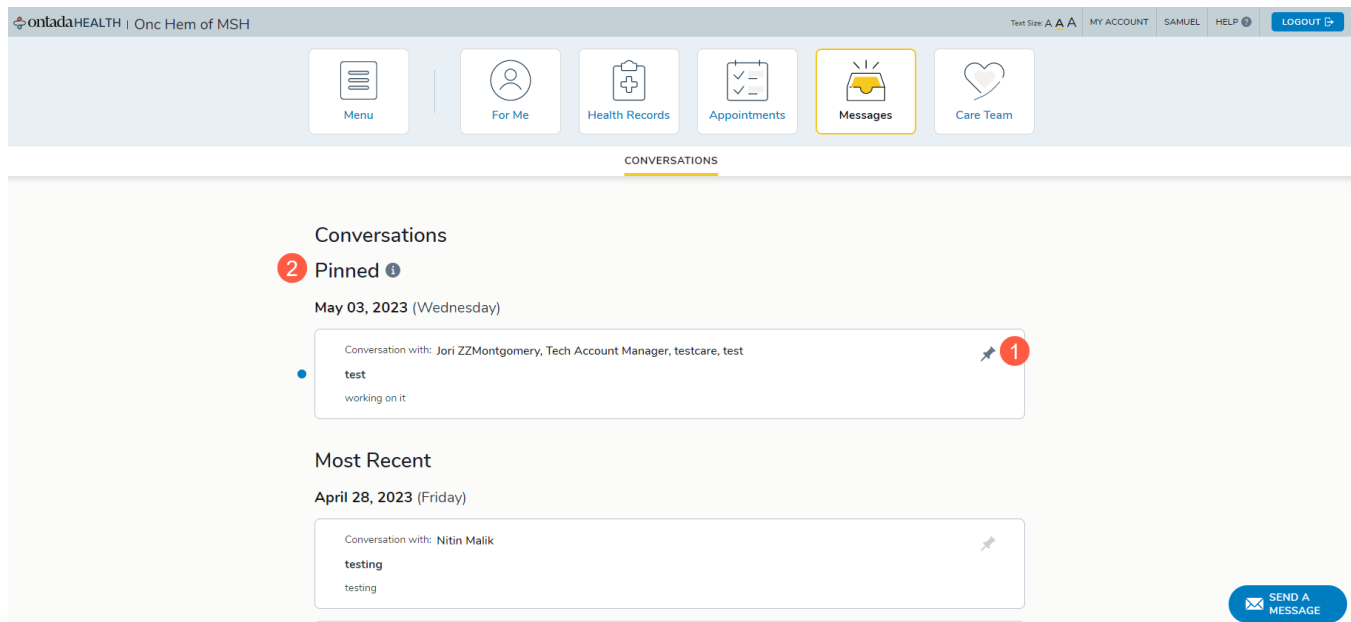


Messages Page

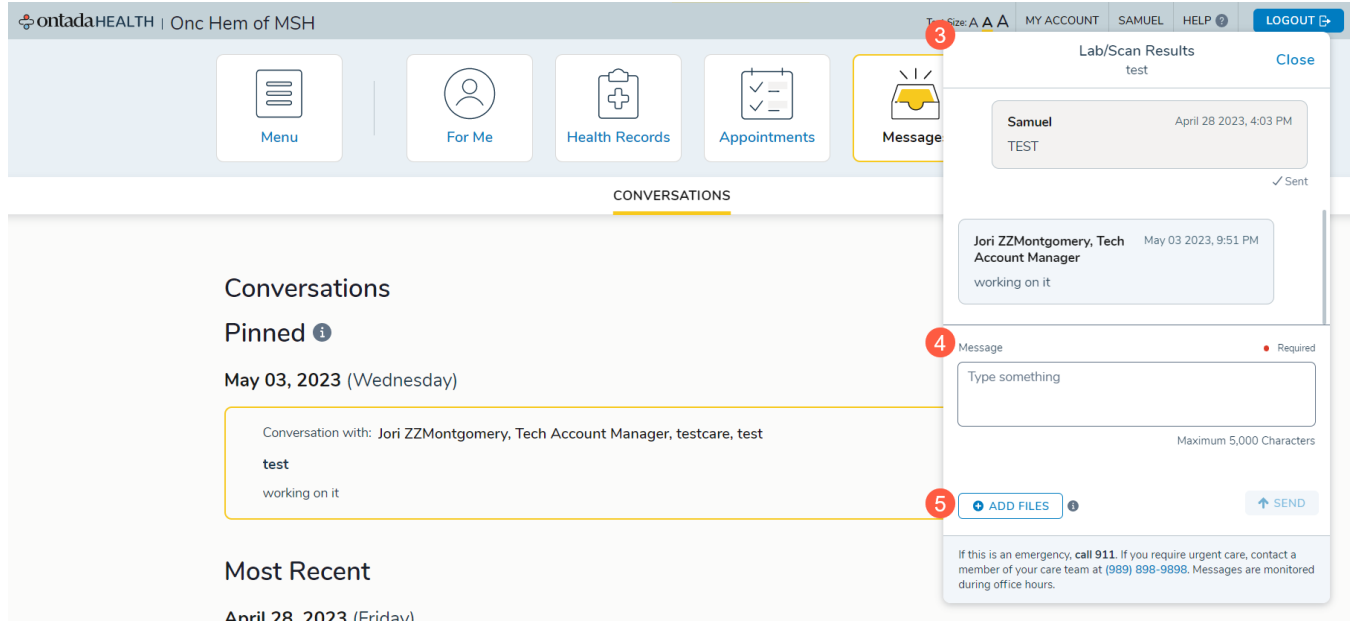
Use this page to view and reply to existing messages and to send new messages.

Viewing and replying to existing messages

Existing messages will be organized by date starting with the most recent message. Clicking the pin icon on a message (callout 1) will move it to the **Pinned** area (callout 2) so that it remains at the top regardless of the date. This makes it easier to locate going forward.

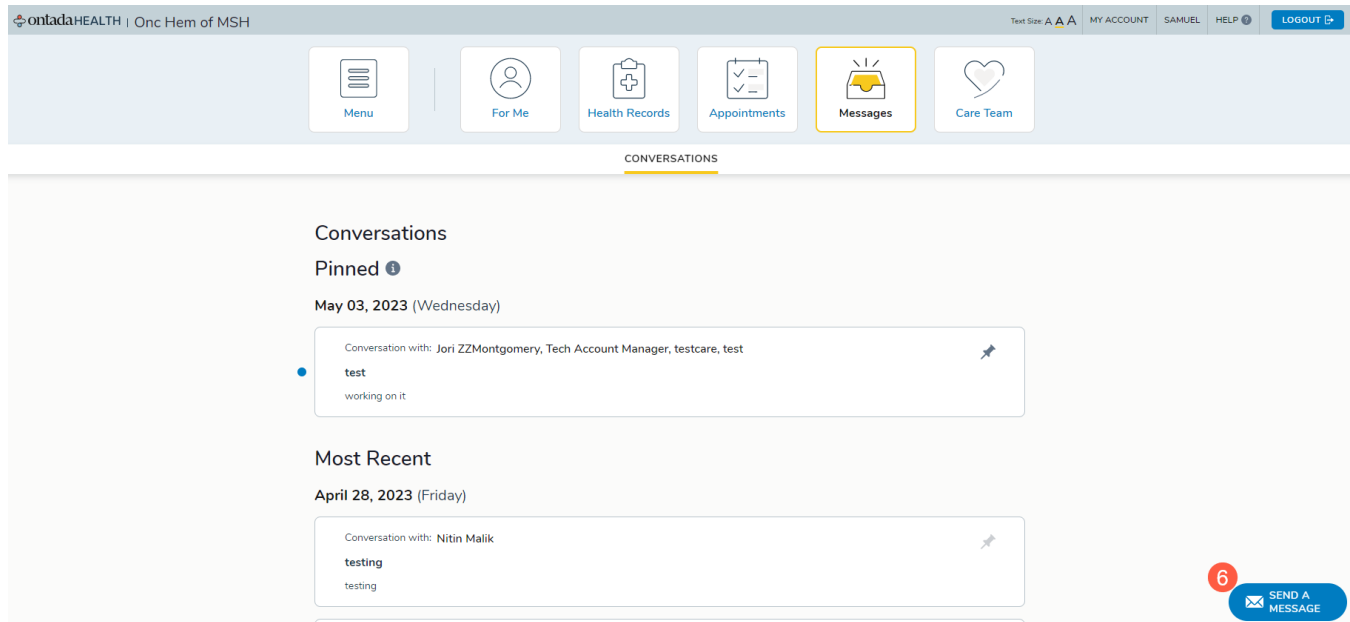


To view a message, simply click on it. This will open a panel (callout 3) where you can view the message history, type a new message (callout 4), and/or add any attachments for your contact to review (callout 5).



Sending a new message

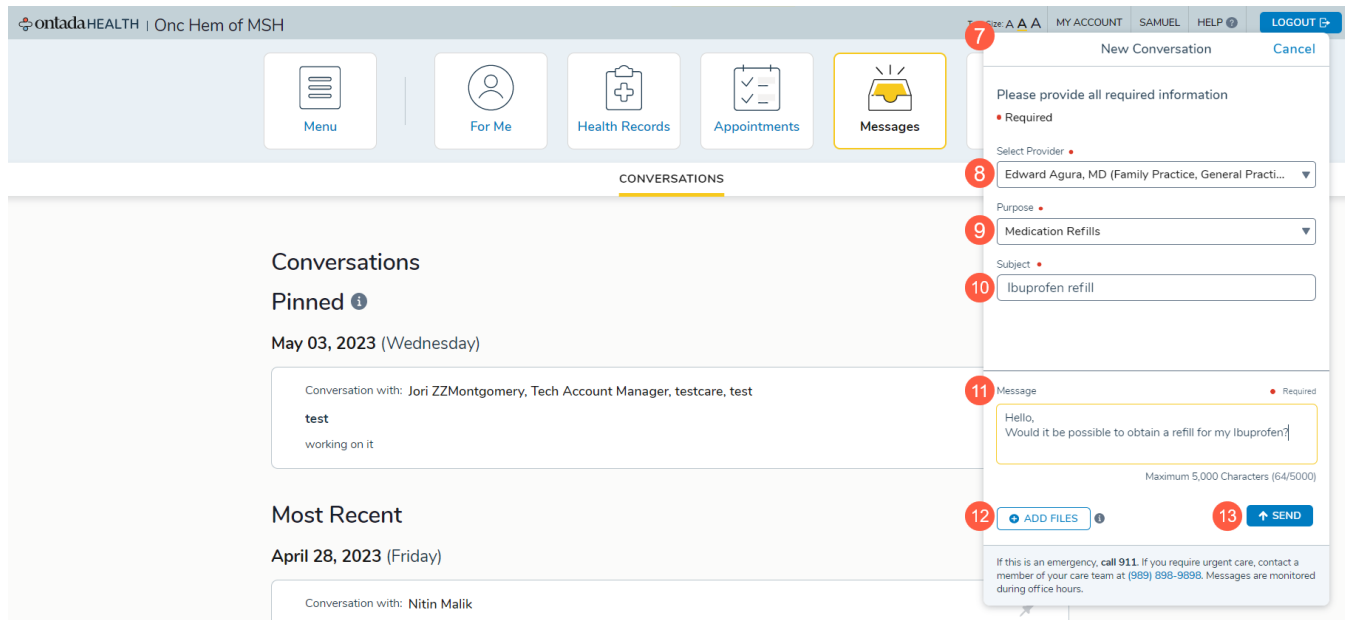
To send a new message, click the **Send a Message** icon on your Conversations page (callout 6).



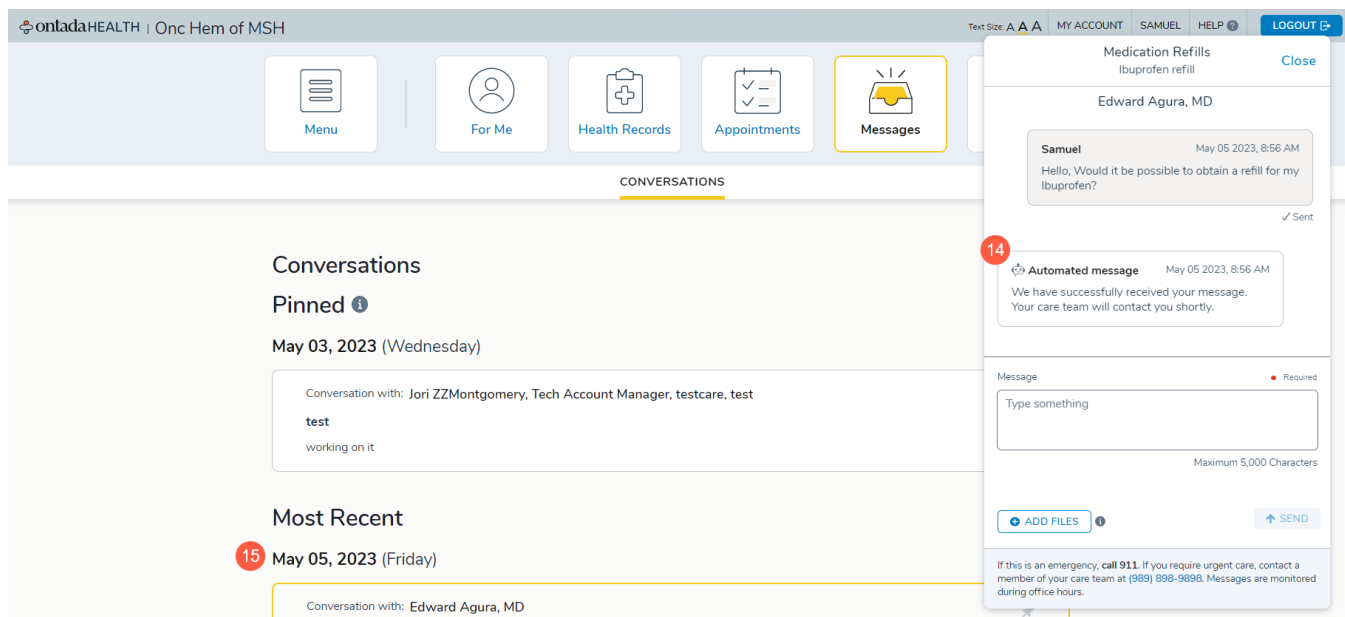
This will open a panel (callout 7) where you must select a provider to message (callout 8), choose a purpose for the message (callout 9), and type in a subject line (10).

Type your message into the **Message** box (callout 11) and, if needed, attach any files using the **Add Files** button (callout 12).

When you're ready to send the message click the **Send** button (callout 13).



After clicking Send, you will receive an automated success message stating that your message has been received (callout 14). A new entry will also be created on your conversations page beneath today's date (callout 15).

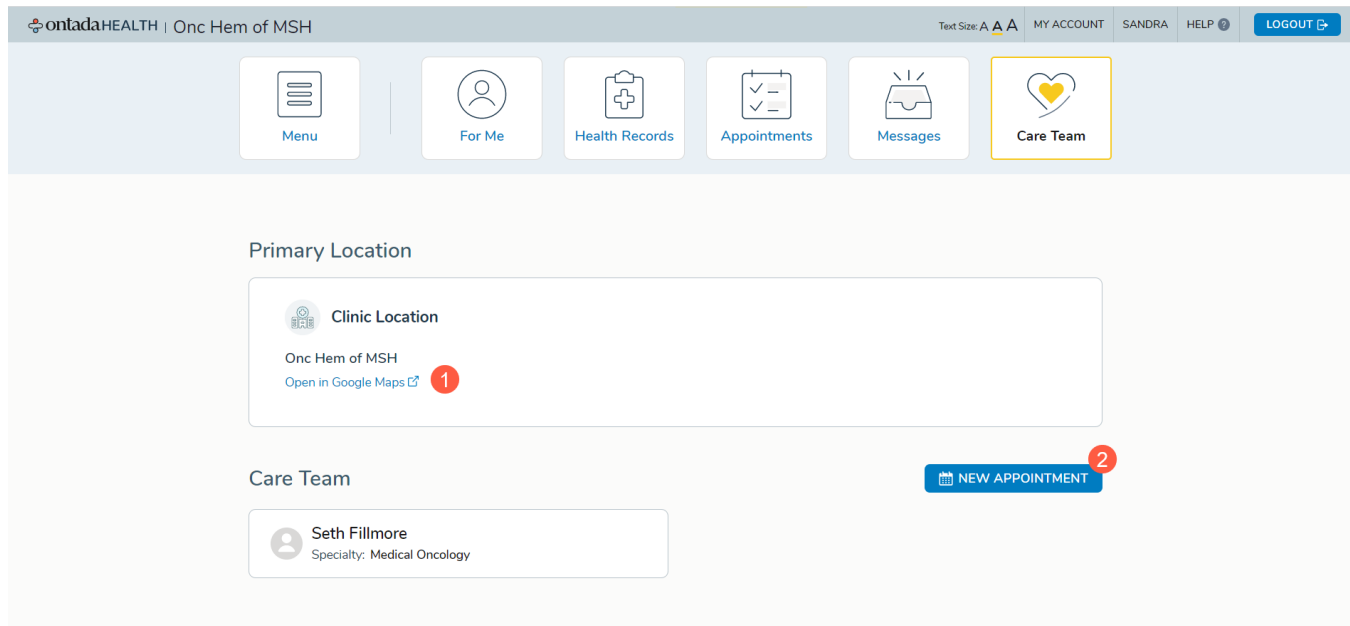


Care Team Page

Use this page to review your preferred doctor’s office location and the doctor(s) treating your condition(s).

If you need directions to the office, click the **Open in Google Maps** link (callout 1).

To schedule an appointment with someone from your care team, click the **New Appointment** button (callout 2). Follow the instructions above in the [Appointments](#) section.



My Account Page

Use this page to review and maintain your personal and account information, including your login credentials and the ability to grant access to your health information to a caregiver.

Personal Information

View your personal and contact information that your doctor has on file. If any of this information requires an update, contact your doctor’s office to inform them of the change.

The screenshot shows the 'My Account' page with a navigation bar at the top containing 'ontadaHEALTH | Onc Hem of MSH', 'Text Size: A A A', 'MY ACCOUNT', 'SANDRA', 'HELP', and 'LOGOUT'. Below the navigation bar are buttons for 'Menu', 'For Me', 'Health Records', 'Appointments', 'Messages', and 'Care Team'. The main content area is titled 'My Account' and features a sidebar with links for 'Personal Information', 'Account Settings', 'Caregivers', and 'Email Notifications'. The 'Personal Information' section is active, displaying 'Demographics' (Name: Lee, Sandra; Sex at Birth: Female; Date Of Birth: 12/16/1975; Race: WHITE; Ethnicity: NOT HISPANIC OR LATINO; Language: English) and 'Contact Information' (Home Address: 123 Main Street, Metuchen, NJ 08840).

Account Settings

View and edit your login credentials as needed, including updating your username/email address and password. Simply click the **Edit** link next to each item to make changes (callouts 1 and 2).

The screenshot shows the 'My Account' page with the 'Account Settings' section active. The sidebar highlights 'Account Settings' and lists 'Personal Information', 'Caregivers', and 'Email Notifications'. The 'Account Settings' section is titled 'Login Credentials' and shows 'Username / Email Address' (ashley.dopp@mckesson.com) and 'Password' (masked with asterisks). Both fields have an 'Edit' link next to them, with red callout circles containing the numbers '1' and '2' respectively.

Caregivers

Invite and manage caregivers to Ontada Health so that they may review your health records, appointments, and messages. To begin:

1. Click the **Add Caregiver** button (callout 1).

The screenshot shows the 'My Account' page with a navigation menu at the top. The 'Caregivers' section is highlighted in the left sidebar. The main content area shows a 'No Caregivers' message with a red callout '1' pointing to the 'ADD CAREGIVER' button.

2. Enter your caregiver’s first name, last name, mobile phone number, and email address. If your caregiver does not have a mobile phone number, click the box next to **Caregiver doesn’t have a mobile phone** (callout 2). Then click the **Next** button (callout 3).

The screenshot shows the 'Add Caregiver' form with a progress bar at the top. The 'Contact' step is active. The form fields are: First Name (Tom), Last Name (Lee), Mobile Phone Number ((908) 772-3232), and Email Address (ashley.dopp@mckesson.com). A checkbox labeled 'Caregiver doesn't have a mobile phone' is highlighted with a red callout '2'. The 'NEXT' button is highlighted with a red callout '3'.

- On the next page, you can give your caregiver full access to your health information (callout 4) or grant access to specific areas (callout 5).

The screenshot shows the 'Add Caregiver' page in the patient portal. At the top, there is a navigation bar with 'ontadaHEALTH | Onc Hem of MSH', text size controls, and user information (MY ACCOUNT, SANDRA, HELP, LOGOUT). Below this is a menu bar with icons for Menu, For Me, Health Records, Appointments, Messages, and Care Team. The main content area is titled 'My Account' and has a sidebar with 'Personal Information', 'Account Settings', 'Caregivers' (highlighted), and 'Email Notifications'. The main section is 'Add Caregiver' with a progress bar showing 'Contact' (completed), 'Access' (current), and 'Submit'. Under 'Tom Lee's access to your information', there are two options: 'Full access' (with a 'SELECT 4' button) and 'Choose Access' (with a 'SELECT 5' button). At the bottom, there are 'BACK', 'CANCEL', and 'NEXT' buttons.

- If you click the **Select** button under **Full Access**, click the **Next** button to continue to the last step.
- If you click the **Select** button under **Choose Access**, you will be taken to a page where you can choose which areas your caregiver can access. Check the boxes underneath **Health Records**, **Appointments**, and/or **Messages** (callouts 6-8).
- Once you've made your selections, click the **Next** button to continue (callout 9).

This screenshot shows the 'Add Caregiver' page after selecting specific areas for access. The progress bar remains the same. Under 'Tom Lee's access to your information', three options are shown with checkboxes: 'Health Records' (Selected 6), 'Appointments' (Selected 7), and 'Messages' (Selected 8). At the bottom, the 'NEXT' button is now highlighted with a red callout '9', indicating it is the next step.

- On the last page, review the information you entered to ensure its accuracy. If anything needs to be changed, use the **Back** arrow (callout 10). If everything looks correct, click the **Send Invitation** button (callout 11).

ontadaHEALTH | Onc Hem of MSH Text Size: A A MY ACCOUNT SANDRA HELP LOGOUT

Menu | For Me | Health Records | Appointments | Messages | Care Team

My Account

Personal Information
View demographics and contact information

Account Settings
Manage Ontada Health account settings

Caregivers
Manage caregivers that have access to your account

Email Notifications
Manage email notifications

Add Caregiver

Progress: Contact ✓ | Access ✓ | Submit ●

Tom Lee

Email Address: ashley.dopp@mckesson.com Access: Full access

Mobile Phone Number: (908) 772-3232

Invitation will expire after 30 days - you can resend the invitation any time from the caregiver page

← BACK ¹⁰ CANCEL SEND INVITATION ¹¹

- You will be returned to the Caregiver page where you will see a success message (callout 12).
- Your caregiver will be sent an email invitation, like the one you received, to create their Ontada Health account.
- You may edit the caregiver's information and access using the **Edit** button under their name (callout 13).
- If you checked that your caregiver **does not** have a mobile phone in step 2, click the **Access Code** button (callout 14). You must share this access code with your caregiver so they may complete the registration process when creating their own account.
- To grant another caregiver access to your health information, click the **Add Caregiver** button (callout 15) and follow the process again.

ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me Health Records Appointments Messages Care Team

My Account

- Personal Information**
View demographics and contact information
- Account Settings**
Manage Ontada Health account settings
- Caregivers**
Manage caregivers that have access to your account
- Email Notifications**
Manage email notifications

Caregivers

[ADD CAREGIVER](#) ¹⁵

Invite caregivers to access the Ontada Health portal and view your health records, appointments, and messages. To protect your privacy, you can limit what information each caregiver can see.

✓ Caregiver successfully added ✕ ¹²

Tom Lee
ashley.dopp@mckesson.com
Status: Invitation Sent
Access: Full access

[ACCESS CODE](#) ¹³ [EDIT](#) ¹⁴

Email Notifications

Use this page to manage your email preferences. You're in control of what information Ontada Health sends to your email address.

Click the **Enable Email Notifications** toggle (callout 1) to turn on or off **all** email notifications from Ontada Health.

With this notification turned on, you can then choose which emails to receive by setting the toggles on or off under each category (see callout 2 for an example).

ontadaHEALTH | Onc Hem of MSH Text Size: A A A MY ACCOUNT SANDRA HELP LOGOUT

Menu For Me Health Records Appointments Messages Care Team

My Account

- Personal Information**
View demographics and contact information
- Account Settings**
Manage Ontada Health account settings
- Caregivers**
Manage caregivers that have access to your account
- Email Notifications**
Manage email notifications

Enable Email Notifications On ¹

Clinical Notes On ²

Results On

Medications On

Appointments On

Messages On