Connect Frequently Asked Questions

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- What if I accidentally “deactivate” an active account from the Connect Administration page?
- How do I reset a patient’s password?
- Why does a child appear as “inactive” on a parent’s chart, even though the parent has proxy access to their child?
- A parent says they have proxy access for their child, but can’t see the child’s information in Connect. What could be the reason?
- The patient wants to complete their video visit using a smartphone or tablet but is having issues. Is there a workaround?

Additional Resources:

- Patient FAQ: https://www.myconnectnyc.org/MyChart/default.asp?mode=stdfile&option=faq
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Who can sign up for a Connect account?

Any patient age 12 or over is eligible for a Connect account. In addition, parents can be given portal proxy access to manage their children’s accounts, or patients can grant access to their own accounts to family members, friends, or caregivers.

How do I know if a patient has a Connect account?

A patient’s Connect status is visible on the storyboard on the left side of the screen. The icon directly to the right of the patient’s photo (or generic silhouette) indicates the status:

No connection (line through the computer icon):

Pending (clock on the computer icon):

Connected (green checkmark through the computer icon):
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Front desk and scheduling staff can also view the status further down the storyboard and in the registration demographics. Both are links that take a user directly to the appropriate MyChart activity.

How do patients sign up for Connect?

There are several methods for activating a patient on Connect:

- Self-Sign-Up
- Welcome Check-In
- Front Desk Check-In (Instant Activation)
- Auto Instant Activation
- In Exam Room Sign-Up
- Ad Hoc Sign-Up from registration/scheduling (Instant Activation)

The Instant Activation process makes it easy for the patient to activate their account. If the patient accesses the link in their activation message within 24 hours, the only step they need to take is entering a password. The user name will be filled in with their email address and the activation code will also be prepopulated.

*It is essential to verify a patient’s identity before signing them up for Connect*, since they will gain access to PHI once they activate their account.
What is Self-Sign-Up for Connect?

Patients can sign up for Connect on their own, without any intervention from staff. During the process, the patient will be asked a series of questions (such as “Which of these cars have you ever owned?” or “Which of these addresses have you been associated with?”). We have engaged a third-party that uses these questions to verify the patient’s identity and match the patient to the correct record in Epic. If the process is successful, the patient is able to create their Connect account.

This process will not work for everyone:

- In some cases, the third-party will be unable to verify the patient and/or match to their Epic record.
- While adolescents 12 and older are eligible for their own Connect accounts, they are unlikely to have the credit history necessary for the third-party to validate their identity.
- This process cannot be used for proxy relationships. Patients can use this process only to set up access to their own account.

Patients can access the self-sign-up option at our Connect website: https://www.myconnectnyc.org/MyChart/signup

To access that page from our main Connect website page (https://www.myconnectnyc.org), click “SIGN UP NOW.”

On the next page, click “SELF SIGN UP,” on the right side of the screen on a desktop or at the bottom on a mobile device.
Can patients sign up for Connect during Welcome check-in?

Yes, patients will be given the option to sign up for Connect while checking in through Welcome.

Should staff activate patients for Connect during check-in?

Yes. During the check-in process, if the patient does not have an account, staff will be prompted by a pop-up to ask patients to join Connect. Staff should take this opportunity to talk to patients about Connect. Offer to send the email activation, or proxy invite for parents/guardians of children younger than 12.

Because we are using the Instant Activation method, it is easier for patients if they activate their accounts within 24 hours. It is essential to inform patients that they will receive the activation message and encourage them to sign-up. They can do it while they wait for their appointment to begin.

What is Auto Instant Activation?

Any patient 18 years or older who is checked in, but does not yet have a Connect account, will automatically be sent an activation message.

Staff should inform patients that these messages will be sent and encourage patients to sign-up as soon as possible. Because we are using the Instant Activation method, it is much easier for patients if they activate their accounts within 24 hours.
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What is the In Exam Room Sign-Up option for Connect?

During a visit, the clinical support staff have the option to launch a Connect sign-up process, by opening the MyChart Signup navigator section. The clinician clicks Launch MyChart Signup, which opens the MyChart signup page in a web browser, while securing Epic. The patient can then complete the signup workflow while in the exam room.

Can we sign patients up over the phone?

It is essential to verify a patient’s identity before signing them up for Connect, since they will gain access to PHI once they activate their account. Therefore, sign-up should be done in person.

How do we convert patients who had FollowMyHealth accounts to have Connect accounts?

If a patient had a FollowMyHealth account, we have already verified their identity and email address. Therefore, once you have validated that the contact information from our legacy systems is the same in Epic, you can send them an activation message, without them needing to present in the office.

How do we convert patients who had myNYP.org accounts to have Connect access?

If a patient had a matched myNYP.org account, please encourage them to provide a valid email address and a contact telephone number. After the patient’s visit to the hospital, they will receive an invitation message to join Connect. You can also proactively send the patient an invitation directly from Epic Hyperspace after verifying their identity. Please reference the Ambulatory Quick Start Guide (staff perspective) and Connect Patient Guide (patient perspective).

What is the difference between portal proxy access and a healthcare proxy?

The use of portal proxy access for a patient is intended to assist and support a patient in managing their medical care. Examples of individuals that may be granted proxy access to the portal include, but are not limited to:

- A parent or legal guardian of a minor child up to the child’s 18th birthday
- The legal guardian of an incapacitated patient
- The holder of a healthcare power of attorney for a patient
- Spouse or Domestic Partner
- Adult child of a parent
- Other adult designated by the patient

Through portal proxy access, the person can view the patient’s healthcare information and help manage the patient’s healthcare. The patient has the right to grant any adult access to their portal account.
A healthcare proxy is a legal document through which a patient grants another person the legal authority to make healthcare decisions if the patient is incapable of doing so. This is a legal process that is separate and distinct from portal proxy access.

**Can an adult patient give another individual access to their Connect account?**

Yes, an adult patient may give any other adult access to their Connect account, by granting portal proxy access. The patient needs to complete the Connect Patient Portal Proxy Access Authorization form. Staff will need to then access the patient’s account and grant the person proxy access to the patient’s Connect account. The form should be scanned and placed in the patient’s chart. See the Connect Guide for specific instructions:  
https://epictogetherny.org/Training/TipSheets/EpicTipSheets/Ambulatory_Connect%20Clinic%20Guide.pdf

**Can parents/guardians obtain Connect access for their child?**

Parents or legal guardians can be given portal proxy access on behalf of their children under the age of 12 years old. No forms are required for this type of proxy access. Staff should access the child’s account and launch the proxy access invite process. See the Connect Guide for specific instructions:  
https://epictogetherny.org/Training/TipSheets/EpicTipSheets/Ambulatory_Connect%20Clinic%20Guide.pdf

**What kind of access to patients aged 12-18 and their parents/guardians have?**

Patients who are 12 or older are eligible for their own Connect accounts.

Parents or legal guardians may be granted limited proxy access to the patient’s account, only with the patient’s permission. In these cases:

- Portal proxy access to an adolescent’s Connect record must be renewed every two (2) years
- A provider may revoke or not authorize a parent or guardian’s portal proxy access to a minor’s record between the ages of 12-18 if they believe their access may interfere with the patient’s treatment
- Parent/guardian’s access will be automatically terminated when the child reaches their eighteenth birthday.

If a parent/guardian has proxy access to a child’s account, and the child turns 12, the parent/guardian’s access will be limited. See the Connect Guide for specific instructions:  
https://epictogetherny.org/Training/TipSheets/EpicTipSheets/Ambulatory_Connect%20Clinic%20Guide.pdf

**What if a patient is of limited capacity and unable to complete the proxy access form?**

In some cases, a patient may be of limited capacity and be unable to complete the proxy access form.
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If the person requesting access to the patient’s account has documented legal authority to make health care decisions, that person may be given portal proxy access to the patient’s account. Legal documentation may include legal guardianship of an incapacitated adult or healthcare power of attorney for a patient unable to make their own decisions.

In other situations where there is a question about a patient’s capacity to authorize access to their portal account, the patient’s provider should be consulted to determine if proxy portal access is appropriate to support the treatment of the patient. This information should be documented in the medical record.

What are patients able to do in Connect?

Patients have the ability to view information and manage various aspects of their healthcare through their Connect accounts. Here is list of the main functions available to patients:

- Messaging (come as In Basket messages):
  - Medical advice messages
  - Customer service messages
  - Prescription refills
- Appointments:
  - View past and upcoming appointments
  - Request appointments
  - Cancel appointments
  - Directly schedule appointments (where enabled)
  - Fast Pass offers (automatically offer patients on waitlists sooner appointments as slots open up)
- E-Check-In (patients can review demographics, complete administrative and clinical forms, and pay copays ahead of their visit)
- Telehealth:
  - E-visits (guided questionnaires for basic clinical issues)
  - Video Visits
- View health record information:
  - Problems
  - Medications
  - Allergies
  - Medical history
  - Results
  - After visit summaries
- Request medical records
- Pay bills
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How are results released to patients?

The release logic for results has been standardized across Columbia, NewYork-Presbyterian, and Weill Cornell Medicine. Most results are automatically released to patients once finalized.

- Lab results: 2 business days
- Imaging: 4 business days
- Pathology: 4 business days
- Genetic testing: not automatic
- HIV, STIs: not automatic
- Inpatient results: 36 hours post-discharge

If a provider wants to discuss a particular result with the patient, but can’t reach the patient, the provider can manually block that result until able to review with patient.

If a provider has reviewed a result that does not release automatically with the patient, the provider can manually release the result to the patient’s account.

Is clinical information from Allscripts, CROWN and other legacy systems available to patients in Connect?

Only clinical information in Epic is available to patients through their Connect account.

- Once a provider has validated a patient’s problems, medications, and allergies and entered them into the patient’s chart in Epic, they will be available in the patient’s Connect account.
- Results are available in Epic from early to mid-2019, so those results are available to the patient through their Connect account.
- After visit summaries are available for services delivered Feb. 1, 2020 and later.

Other clinical information from Allscripts, CROWN or other legacy systems is not available in Epic and, therefore, is not available to patients through Connect.

Patients with FollowMyHealth or myNYP accounts will continue to have access to view their historical information through that account.

I just reset the password but the patient still can’t log in. What are they doing wrong?

If the patient is still unable to log in, here are some tips for troubleshooting:

- Accessing through myconnectnyc.org:
  - Are they on the login page or the signup page?
  - Are they on the correct website? (Try having the patient search for MyConnectNYC.org in a search engine, like Google or Yahoo.)
  - Are they using the correct username? (Check twice!)
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- Are they putting the password in correctly with all the requirements? (Check twice!)
  - Accessing through MyChart:
    - All of the above AND
    - Do they have the correct organization selected?
    - Do they have NYC set as their location?
    - Are they using the correct MyChart app?

Can someone change their Connect username?

Yes, a Connect username can be changed, but only when it is the result of an error (ex: incorrect email address used), not because of the patient’s preference. Call Connect Technical Support at 646-962-4200.

The patient clicked on the link in the activation email but is saying it requires an activation code. What do I do?

Ask the patient if their email address auto-populated into the username field when they clicked the link. If not, they clicked the wrong link. Instruct the patient to go back to the email, scroll down a bit, and click on the link that says ‘Click here to signup now’. (The patient may have clicked on a general link to the Connect website, which is the first link they see in the email.)

Alternately, you can find the patient’s activation code in the Connect Administration page in Epic. You can read the code to the patient (including dashes).

A patient is confident they are entering their correct information while trying to sign up for Connect using an activation link, but they keep getting an ‘invalid personal information’ message. How do I help?

This is almost always a user error. Check these troubleshooting tips:

- If the username defaulted to their email address and they would like to keep it that way, ask them to check to see if there is a hidden space at the end of their email. If so, it needs to be deleted.
- Are they following the password requirements?
  - At least 8 characters
  - At least 1 uppercase letter
  - At least 1 lowercase letter
  - At least 1 number
  - At least 1 special character/symbol (encourage patients who are not familiar with special characters to use something familiar like an exclamation point or dollar sign)
- Do the phone number, zip code, date of birth, and email address the patient is entering match what is listed in the demographics within the Connect Administration page?
- Are they already activated in Connect? They need to navigate to the LOGIN page, not the signup page.
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What should I do when the patients say they can’t see their appointment in Connect?

Make sure that the patient is selecting the correct organization upon login.

The patient is trying to complete eCheckin, but they do not have the option to continue. What should I be instructing them to look for?

If certain demographic fields are blank, the patient needs to select “Edit Changes,” fill in the missing fields, and click “Save Changes.” Once complete, the patient should look for a box at the bottom that says “this information is correct” and then click “Next.” This is the same procedure for all of the forms they need to complete.

The patient is having trouble logging into Connect. What could be the problem?

- The patient may not be using the right username and password. If they cannot remember their password you can reset it for them from the Connect Administration page.
- The patient may have selected the wrong organization at the login page. The patient needs to choose the correct one based on where they receive their care (New York Presbyterian, Columbia University Irving Medical Center, or Weill Cornell Medicine). If these options are not appearing, they need to change their location to “New York.”
- The patient may be using the wrong app. The MyChart app has a logo that looks like a red folder with a heart and says “Powered by Epic” when opened.

What if I accidentally “deactivate” an active account from the Connect Administration page?

Click “Activate.” The login credentials from their last login will remain intact.

How do I reset a patient’s password?

- From the Connect Administration activity in Epic, select the “Change Password” button. You can create a temporary password (must require at least 8 characters, 1 upper case letter, 1 lower case letter, 1 number, 1 special character) and tell the patient to enter it in the password field of the login screen along with their username. This will prompt the Patient to create a new password of their own (the same requirements apply).
- Click “Deactivate” under their Active Connect status from within the Connect Administration page. Then, click “Launch signup” and follow the steps to reset the password yourself. This is the best approach for Patients who are having a hard time with technology and/or are very frustrated.
Why does a child appear as “inactive” on a parent’s chart, even though the parent has proxy access to the child?

Patients under 12 are not eligible for their own accounts (they require proxy use). Therefore, they appear as inactive, since they do not have their own Connect accounts. Once they turn 12, they will be able to create their own Connect account and will then appear as Active.

A parent says they have proxy access for their child, but can't see the child’s information in Connect. What could be the reason?

- If the patient is younger than 12 years old:
  - The parent needs to toggle from her name to her child’s name within Connect
- If the patient is 12 years or over:
  - When a patient turns 12, the parent or guardian’s access is very limited. If the parent had proxy access before their child turned 12, they may be confused that they no longer have complete access to their child’s information.

The patient wants to complete video visit using a smartphone or tablet but is having issues. Is there a workaround?

Yes, a patient can complete their video visit on a computer or laptop if they have a camera. Tell the patient to go directly to the Connect website (www.myconnectnyc.org) via their browser and login to their account. (NOTE: They have to include the ‘www’. Alternately, they can Google ‘myconnectnyc login’ and click on the first result.) If they choose to initiate their video visit via computer or laptop, they will have to download the Zoom desktop app and make sure pop-ups are enabled on their browser settings.