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Additional Resources:

- Connect Clinic Guide: [https://epictogetherny.org/Training/ExerciseBooklets/Connect \(Epic MyChart\) Clinic Guide.pdf](https://epictogetherny.org/Training/ExerciseBooklets/Connect%20(Epic%20MyChart)%20Clinic%20Guide.pdf)
- Ambulatory Connect Clinic Guide: [https://epictogetherny.org/Training/TipSheets/EpicTipSheets/Ambulatory Connect%20Clinic%20Guide.pdf](https://epictogetherny.org/Training/TipSheets/EpicTipSheets/Ambulatory%20Connect%20Clinic%20Guide.pdf)
- Patient FAQ: <https://www.myconnectnyc.org/MyChart/default.asp?mode=stdfile&option=faq>
- Patient Handout (about Epic and Connect): <https://epictogetherny.org/Docs/EpicFAQWaitingRoomVersion.pdf>



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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.

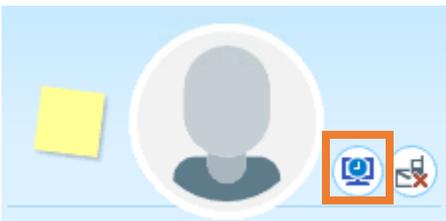
How do I know if a patient has a Connect account?

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 (click 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.

The screenshot displays the Epic MyChart interface for a patient named Burundi Zzzperslab. The patient's profile includes a photo placeholder, name, gender (Male), age (38), date of birth (11/16/1981), phone number (555-666-7777), and MRN (1400000320). The preferred language is French. The registration status is 'Connect: Inactive', which is highlighted with a yellow box. The demographics section shows the patient's address: 125 Main Street, Apt 26, Madison, WI 53705. The primary care physician (PCP) is listed as 'No General PCP', and the 'Connect Signup' status is 'Pending', which is highlighted with an orange box. The interface also shows navigation tabs for 'Appt Desk', 'Registration', and 'FYI', and various tool icons for registration management.

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.

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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.

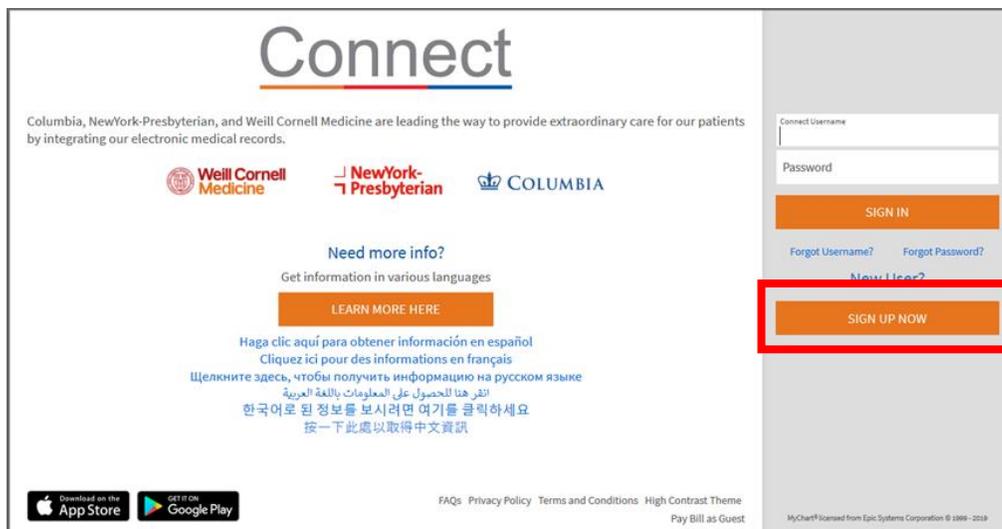
This process will not work for everyone:

- 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.

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Connect

Please Identify Yourself

Step 1
All fields are required.

Connect Activation Code
Enter your Activation Code as it appears on your enrollment letter (your code is not case sensitive). You will not need to use this code after you complete the signup process.

XXXXX - XXXXX - XXXXX

Date of Birth
Enter your date of birth in the format shown, using 4 digits for the year.

mm / dd / yyyy

E-mail Address
Please enter your e-mail address.

abc@xyz.com

Phone Number
Please enter your phone number.

XXX-XXX-XXXX

NEXT

SELF SIGN UP

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.



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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://epictogethermy.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://epictogethermy.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://epictogethermy.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

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.



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- 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.

