

# My UNC Chart Patient Guide

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# Welcome to My UNC Chart

My UNC Chart provides you with online access to your medical record. It can help you participate in your healthcare and communicate with your care team.

From My UNC Chart, you can:

- Review summaries of your previous appointments, including issues addressed during each visit, your vital signs, and tests or referrals that were ordered.
- View your medications, including dosage information and instructions, and request a refill.
- View new lab results, as well as trends over time. For example, view results for your past cholesterol tests on a graph to see if you're close to meeting your target number.
- Access your family members' medical records. For example, you can view your child's growth charts, immunization history, and upcoming appointments.

This guide provides an overview of many of My UNC Chart's features and how to use them.

## Sign up for a My UNC Chart account

To sign up for My UNC Chart, you must be at least 13 years old. There are several different ways to sign up for My UNC Chart:

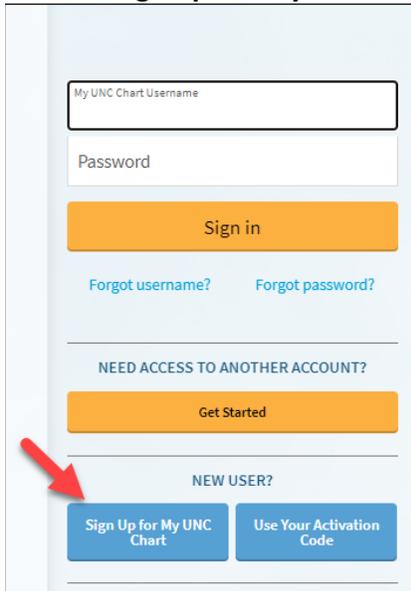
- Your provider's office staff can sign you up while you're at the front desk or in the exam room.
- You may receive a My UNC Chart activation code on your After Visit Summary after your appointment.
- If you are 18 years or older, you may receive a text or email with an activation code when you schedule an appointment, come in for an appointment, or check out from your appointment.
- If you are 18 years or older, you may be able to sign up online to create a My UNC Chart account without an activation code through Experian. This is a third-party service that matches your personal information against your medical record.

### Use your activation code to sign up

1. From the My UNC Chart login page, click **Use Your Activation Code** in the **New User?** section.
2. Enter your activation code, date of birth, and home zip code. Click **Next**.
3. You then will be prompted to enter a Two-Factor Authentication code for extra security
4. On the next page, choose the following:
  - **My UNC Chart username.** This should be something that others wouldn't be likely to guess but easy for you to remember. It cannot be changed at any time.
  - **Password.** This should be a unique combination of numbers and letters, using both uppercase and lowercase letters. Choose a password that you don't use for other websites.
5. On the next page, choose whether you want to receive a notification message in your personal email or via text message when there is new information available in your My UNC Chart account. You can update your notification preferences at any time.

## If you don't have an activation code and are 18 or older

1. Click on **Sign up for My UNC Chart**.



2. You will be asked a series of questions from Experian to verify your identity.
3. On the next page, choose the following:
  - **My UNC Chart username.** This should be something that others wouldn't be likely to guess but easy for you to remember. It cannot be changed at any time.
  - **Password.** This should be a unique combination of numbers and letters, using both uppercase and lowercase letters. Choose a password that you don't use for other websites.
4. On the next page, choose whether you want to receive a notification message in your personal email or via text message when there is new information available in your My UNC Chart account. You can update your notification preferences at any time.

## Log in to My UNC Chart

1. In your web browser, enter or click <https://myuncchart.org/My UNC Chart> to access the login page.
2. Enter your My UNC Chart username and password, and click **Sign In**.

## What if I forget my username or password?

Click the **Forgot Username?** or **Forgot Password?** link below the login fields for assistance. You will be prompted to provide your first and last name, as well as your date of birth and zip code to verify your identity so you can recover your username or password. If we have your e-mail address on file, then your My UNC Chart Username will be sent to that e-mail account.

If you do not remember the information required to recover your Username, or if we do not have your valid e-mail address on file, you will need to contact the UNC Health Outpatient Access Center at (888) 996-2767 to regain access to your My UNC Chart account.

# Two-Factor Authentication for My UNC Chart

Two-factor authentication is an extra layer of security for your My UNC Chart account. With this feature enabled, when you sign in to your account with your username and password, you will be asked for an additional code that will be sent to your cell phone or email.

## How Does It Work?

To use two-factor-authentication, follow these steps:

1. Sign in to your account with your username and password.
2. Choose if you want to have the one-time code sent to your email or cell phone.
3. Enter the code and click "verify."

## How to Disable Two-Factor Authentication

If you do not want to use this feature, you can disable it from your account. You will need to verify your account through two-factor authentication one more time to complete the disable process.

1. Select "Security Settings" in the My UNC Chart menu.
2. Select "Turn off two-step verification."
3. Enter your password and click "continue."
4. Choose if you want to have the one-time code sent to your email or cell phone.
5. Enter the code and click "verify."

You will not be asked to enter an additional code again when signing in to your account. You can always turn this feature back on, if you change your mind.

# Health

## View your test results

With My UNC Chart, you can view test results as soon as they become available rather than waiting for a phone call or letter from your provider.



You may see your test results before your provider has had a chance to review them as Epic@UNC releases test results immediately.

To view test results:

1. Click **Test Results** located on the home toolbar.
2. Select a test to view more information about it, such as:
  - The standard range for the result
  - Any additional comments your provider entered about the result

The screenshot displays the 'myUNCChart' interface for a 'HEMOGLOBIN A1C - Details' test. The top navigation bar includes 'Menu', 'Visits', 'Messages', 'Test Results', and 'Medications'. The test details page shows a 'Comments from the Doctor's Office' section with the message: 'Your results are within normal limits. Keep up the good work!'. Below this is a 'Component Results' table:

Component	Your Value	Standard Range	Flag
Hemoglobin A1C	3.2 %	0.0 - 6.0 %	
Estimated Average Glucose	3 mg/dL	0 - 6 mg/dL	

Below the table is a 'General Information' section with the following details:  
Ordered by McQueenie, Diana  
Collected on 11/15/2022 from Blood venous (Blood)  
Resulted on 11/15/2022 1:44 PM  
Result Status: Final result

A 'Back to the Test Results List' button is located at the bottom of the page.

If you're looking for a specific result, enter key words in the search field on the Test Results page.

You will see results for all organizations where you have received care by default. If you wish to filter to only show results from UNC Health, click the drop-down menu and select **UNC Health Care**.



### Test Results

Search this list



Show:

All Organizations



All Organizations

UNC Health Care

Asante Health Systems

Test

## Receive an email when new results are available

1. Go to **Menu > Communication Preferences**.
2. Expand the **Health** section and select a notification option next to **Test Result**.

### Communication Preferences

Choose how you would like to receive My UNC Chart notifications. You can manage your settings for push notifications on your mobile device.

Email Text Call Mail

#### Appointments

Alerts and notifications about upcoming or past appointments.



#### Messages

Receive updates from your healthcare organization.



#### Health

Notifications when new information is available about your care.



Health Maintenance Reminder



Prescription Ready



Research Study Invitation



Test Result



Receive a daily summary between 8-10 AM on a business day

3. If needed, you can update your email address and mobile phone number at the bottom of the page.

# Manage your medications

## View your current medications

View all of your current medications in one place. You can see details for each medication, including the prescribed dosage, instructions, and the provider who prescribed the medication.

To view your current medications:

1. Click **Medications** located on the home toolbar.
2. To view additional information about a medication such as precautions to consider when taking the medication and potential side effects, click the **Learn more** link.
3. Click **Remove** to delete a medication you are no longer taking.
4. To add a medication to your current list of medications, click **+ Report a medication** at the bottom of the page.

The screenshot shows the 'Medications' page with the following content:

- Medications** (header)
- Current Medications** (sub-header)
- Please review your medications and verify that the list is up to date. **Call 911 if you have an emergency.**
- Need to update your list of pharmacies? [Go to Manage My Pharmacies.](#)
- [Request refills](#) (button)
- medFORMIN 500 MG tablet** (medication name)
  - Commonly known as: GLUCOPHAGE
  - [Learn more](#) (link with callout 2)
  - Take 1 tablet (500 mg total) by mouth 2 (two) times a day with meals.
  - 3 refills before September 2, 2023
  - Prescription Details**: Prescribed September 2, 2022; Approved by McQueenie, Diana
  - Refill Details**: Quantity 60 tablets; Day supply 30
  - [Request refill](#) (button)
  - [Remove](#) (button with callout 3)
- folic acid 400 MCG tablet** (medication name)
  - Commonly known as: FOLVITE
  - [Learn more](#) (link)
  - Take 1 tablet (400 mcg total) by mouth 1 (one) time each day.
  - [Fill in progress](#) (button)
  - 1 refill before December 1, 2022
  - Prescription Details**: Prescribed December 1, 2021; Approved by McQueenie, Diana; Prescription number 0000034-5
  - Refill Details**: Quantity 30 tablets; Day supply 30; Next fill December 1, 2021
  - Pharmacy Details**: CVS Pharmacy # 4290 - DURHAM, NC - 5279 ROXBORO RD, 5279 ROXBORO RD, DURHAM NC 27712; 919-477-8950
  - [Map](#) (button)
  - [Remove](#) (button)
- [+ Report a medication](#) (button with callout 4)



Your chart will be updated after your healthcare provider reviews the change with you at your next visit.

## Request a medication refill

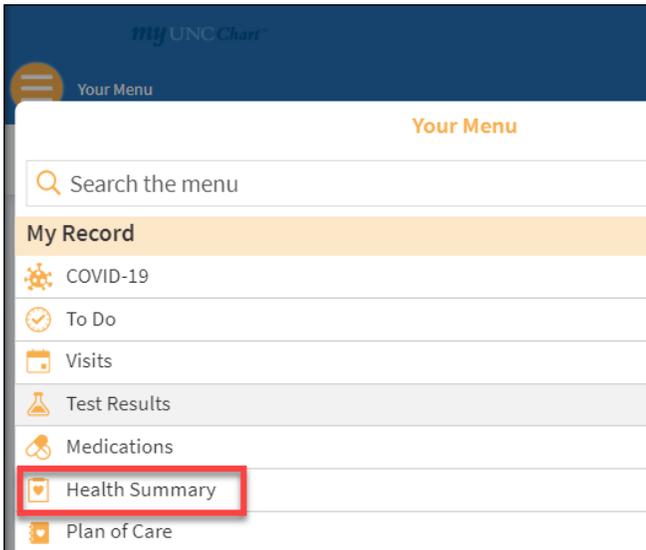
1. From the medication list, click **Request Refills**.
2. Select the check box next to the medication you need refilled. Click **Next**.

The screenshot displays the 'Refills' section of the UNC Health Care portal. At the top, there is a navigation bar with 'Your Menu', a user profile 'A', 'Switch', and 'Log out'. Below this, the 'Refills' title is followed by the 'UNC Health Care' logo. The main heading is 'Refillable Medications' with the instruction 'Choose prescriptions to refill.' A list of medications is shown, with the first entry, 'azithromycin 250 MG tablet', highlighted. This entry includes the text 'Commonly known as: ZITHROMAX', a 'Learn more' link, and 'No refills remaining'. A blue checkmark in a box is visible to the right of this entry, with a red arrow pointing to it. Below the medication list, a summary bar indicates '1 prescription selected' and features a 'Next' button (with a red arrow pointing to it) and a 'Cancel' button.

3. Enter any comments under the medication.
4. Select a delivery method and pharmacy.
5. Click **Next**.
6. Review the details of your refill request and click **Submit**.

# View a summary of your health information

To view a summary of your medical record, go to **Menu > Health Summary**.



This summary includes:

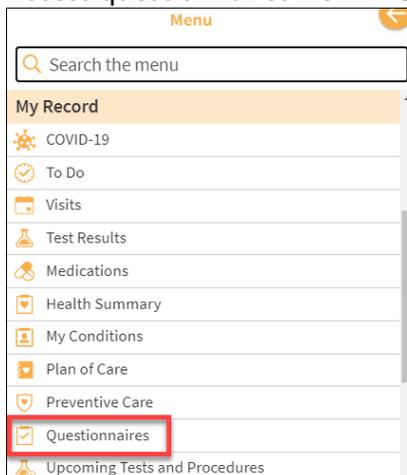
- Current health issues
- Medications
- Allergies
- Immunizations
- Preventive care

# Respond to questionnaires from your clinic

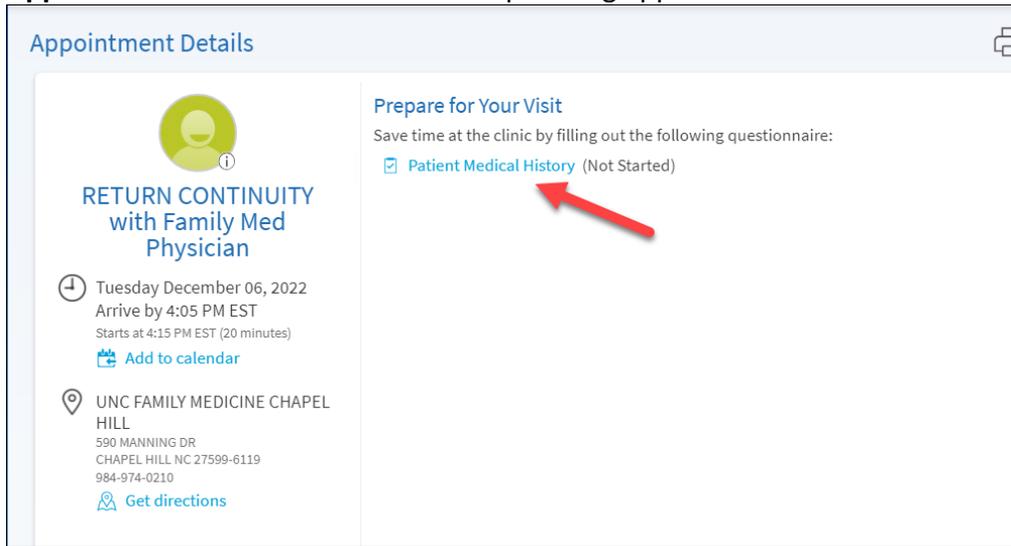
Your provider or clinic may make questionnaires available through My UNC Chart that you can complete online instead of filling out a form when you arrive at the clinic.

You may be able to respond to questionnaires in three different places:

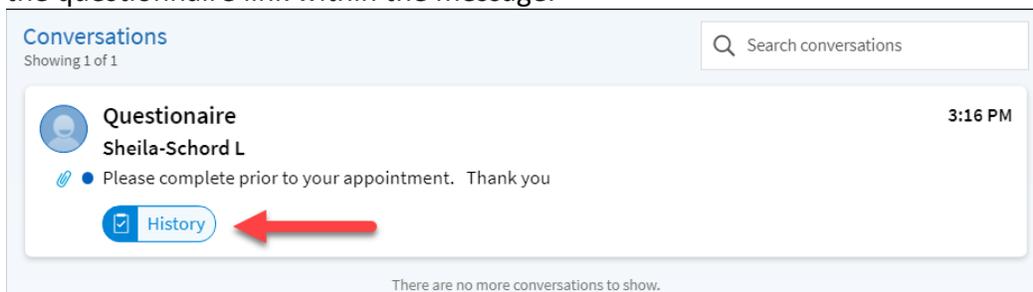
- Access questionnaires from **Menu > Questionnaires**



- If your provider wants you to complete a questionnaire for an upcoming appointment, go to **Visits > Appointments and Visits**. Locate the upcoming appointment and click **Details**.



- If your provider sends you a My UNC Chart message with an attached questionnaire, open it by clicking the questionnaire link within the message.



If you need to close a questionnaire before you finish it, click **Finish Later** to save your progress.

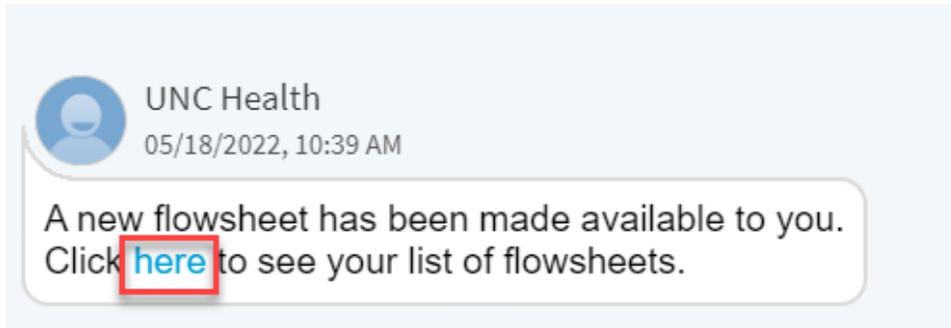
## Track your daily health readings online

Your provider may request you record information such as your daily glucose or blood pressure readings in My UNC Chart. When you enter the information in the **Track My Health** feature, your provider automatically receives the readings and can monitor your progress between visits.

### Record a new reading in Track My Health

**NOTE:** this option will only be available if a provider has sent a flowsheet to you

1. Go to **Menu > Messages**. Open the message from your provider about a new flowsheet. The flowsheet is what you use to enter your readings in the **Track My Health** feature.
2. Open **Track My Health** by clicking the link in the message.



- After you have set this up you can record your readings by going directly to **Health > Track My Health**.
- 3. Click the flowsheet's name to open it, and then click **Add New Data** to begin recording your readings.
- 4. Enter your reading with the date and time and click **Continue**.  
\*\*\*The date and time will auto populate if you are using a mobile device\*\*\*
- 5. Verify you have entered your reading correctly and click **Submit**.
- 6. If you need to change or remove a reading after you've submitted it, you can do so by clicking **edit** or **delete**.

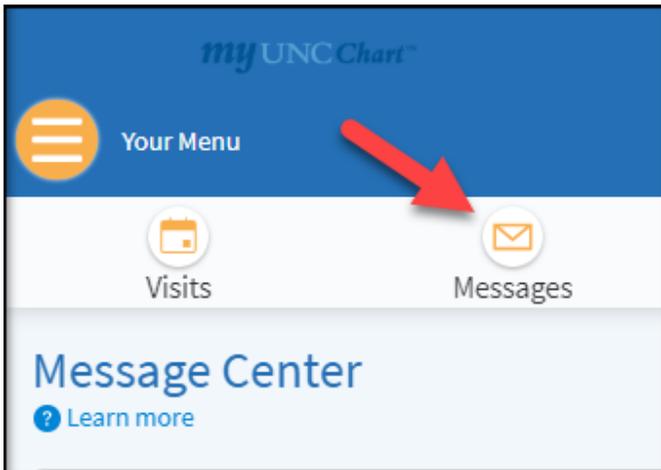
### Track your readings over time in a table or graph

1. On the **Track My Health** page, click the flowsheet's name to view previous readings in a table.
2. From this page, you can:
  - Change the orientation of the table. Click the **More Options** link to choose whether dates appear as rows or columns.
  - View the readings in a graph. Click **Graph** to change the display.
  - Customize the date range or the number of readings that appear. Change the **From** and **To** fields or the **Latest Values** field and click **Apply** to update the display.

# Messaging

## View messages from your clinic

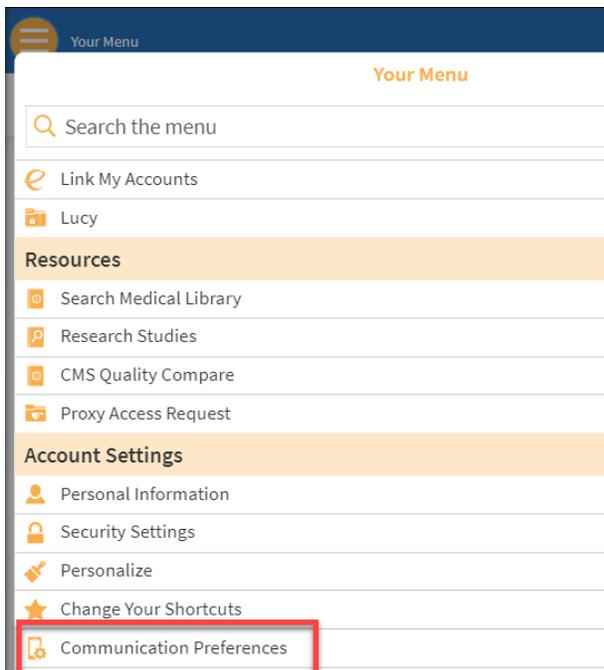
You can read any messages sent by your care team by going to your inbox (**Messages > Message Center**).



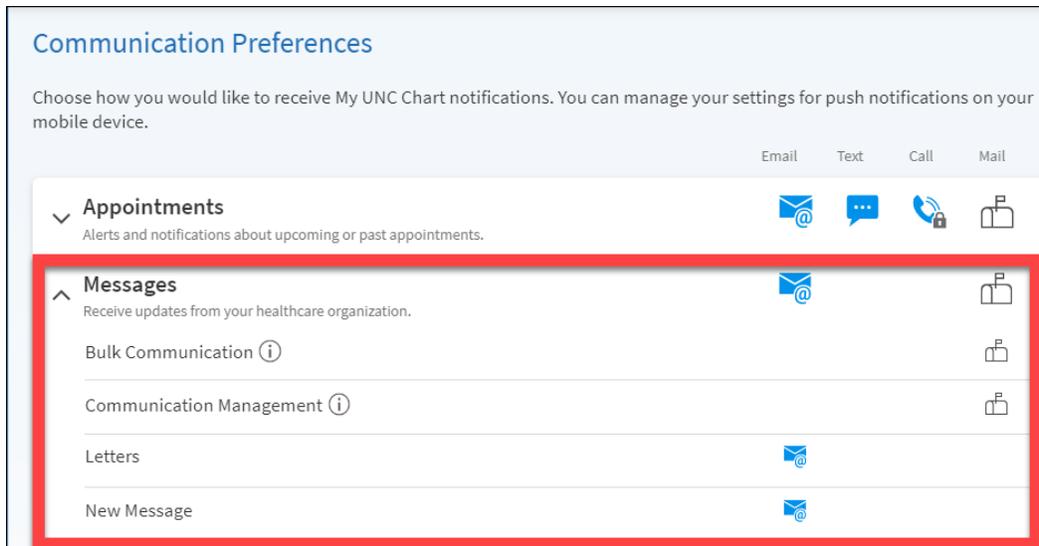
If you're looking for a specific message, enter key words in the search field on the Inbox page.

## Select to receive an email when new My UNC Chart messages are available

1. Go to **Menu > Communication Preferences**.



2. Expand the **Messages** section and select a notification option.

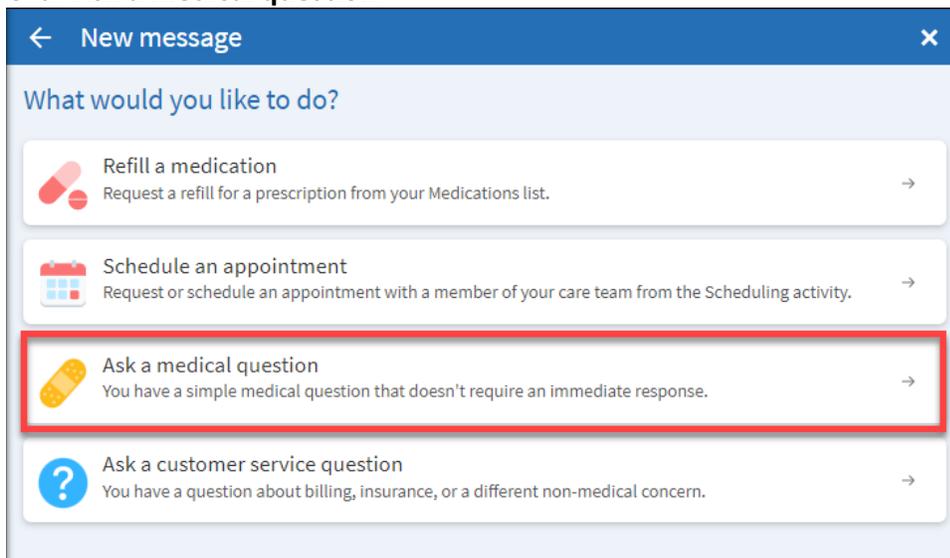


3. If needed, you can update your email address and mobile phone number at the bottom of the page.

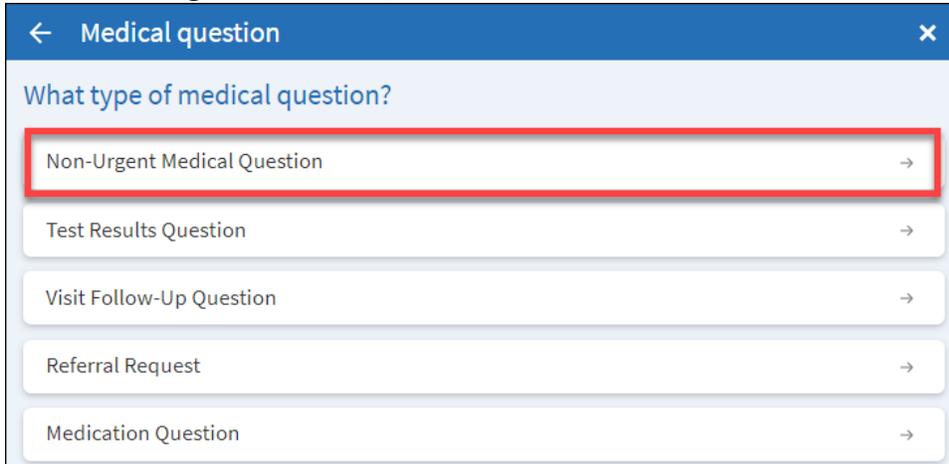
## Ask your care team for medical advice

If you have a non-urgent medical question that does not require an immediate response, you can send a secure message to your healthcare team.

1. Go to **Messages**.
2. Click **Send a message**.
3. Click **Ask a medical question**.



4. Select **Non-Urgent Medical Question**.



The screenshot shows a mobile application window titled "Medical question" with a back arrow on the left and a close 'x' on the right. Below the title bar, the text "What type of medical question?" is displayed. A list of five options is shown, each with a right-pointing arrow. The first option, "Non-Urgent Medical Question", is highlighted with a red rectangular border. The other options are "Test Results Question", "Visit Follow-Up Question", "Referral Request", and "Medication Question".

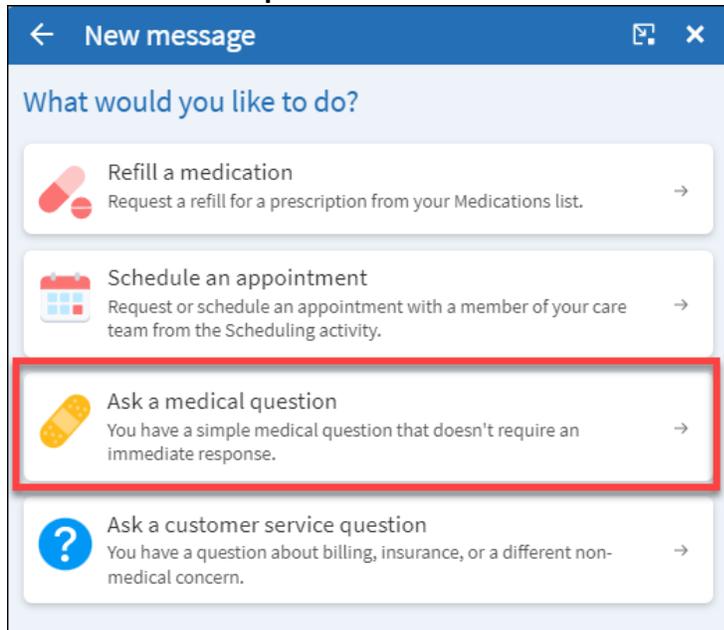
5. Select a recipient from the list. This list might include your primary care provider or another provider with whom you've recently had an office visit or upcoming visit within the next couple of months. \*\*\* If no recipients are listed, you do not have any available for messaging. This may be the case if the below conditions are not met. \*\*\*
6. Select a subject for your message and enter your question.
7. When you are finished, click **Send**.

Someone at your clinic will respond to you within three business days. You can send messages to a provider listed on your care team if one of the following conditions is met:

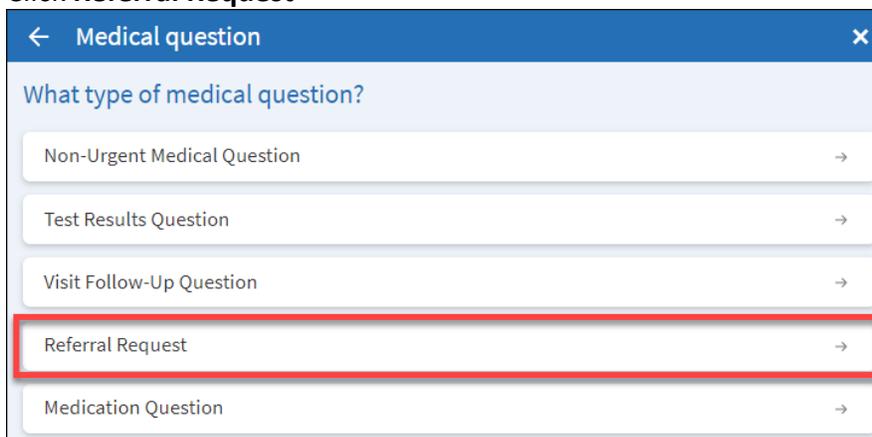
- You have had an appointment with this provider in the past 13 months.
- You have an upcoming appointment with this provider in the next 2 months.
- Provider is listed as your Primary Care Physician on your Care Team

# Request a referral to see another provider

1. Go to **Messages**.
2. Click **Send a message**.
3. Click **Ask a medical question**.



4. Click **Referral Request**



5. Enter the provider you want to see, a reason for the referral, and a brief message explaining your request.
6. When you are finished, click **Send**.

Someone at your clinic will respond to you within three business days. If you've opted to receive email notification for new messages in your My UNC Chart account, you'll receive a message letting you know that the clinic has responded to your request.



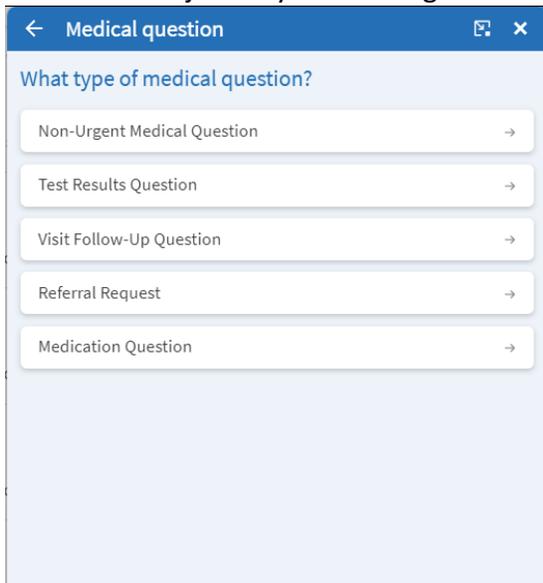
To view a message after you've sent it, go to **Messages** and select the conversation.

# Upload an Image

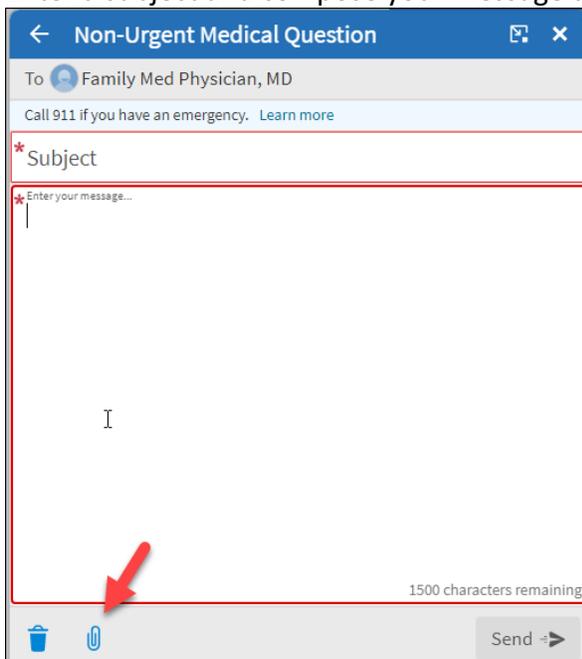
There may be instances when you need to share an image with your care team. The instructions below highlight how to upload an image (GIF, JPG, PNG, TIFF, BMP, TIF, JPEG, or PDF) to My UNC Chart through the Desktop and Mobile App.

## Uploading Photos to My UNC Chart Using a Laptop or PC

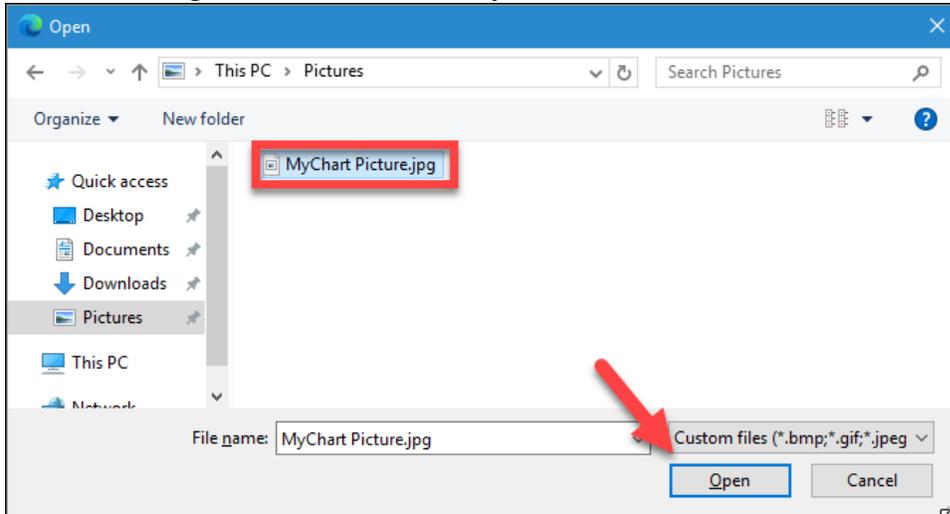
1. Go to **Messages**.
2. Click **Send a message**.
3. Click **Ask a medical question**.
4. Select the subject of your message from the list of options.



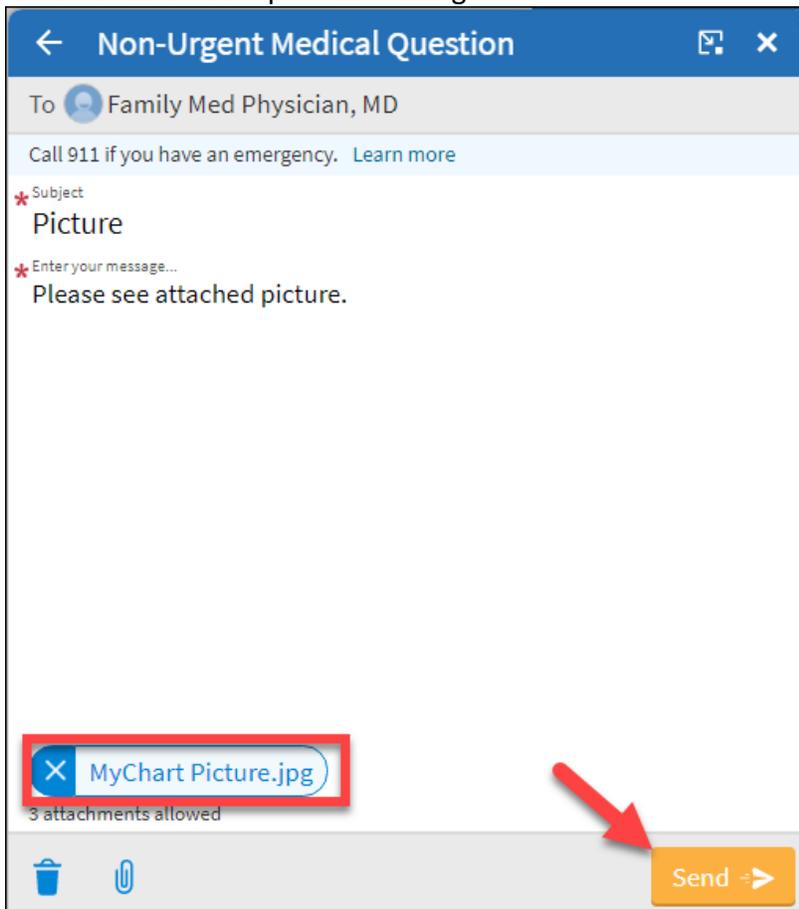
5. Select who should receive the message.
6. Enter a subject and compose your message then click the **paperclip icon** to attach an image.



7. Select the image to attach and click **Open**.

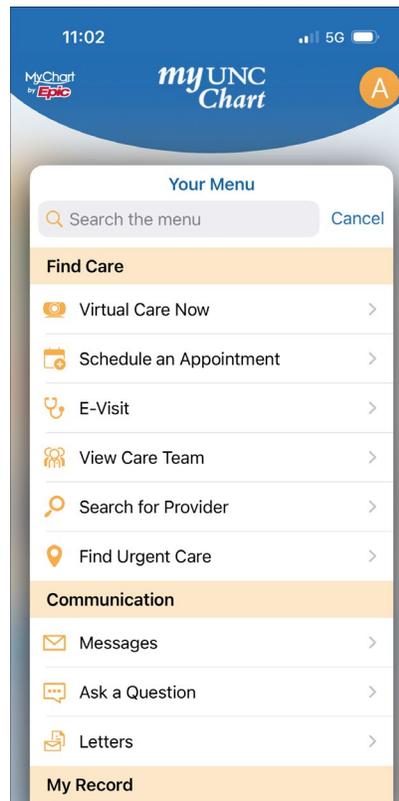
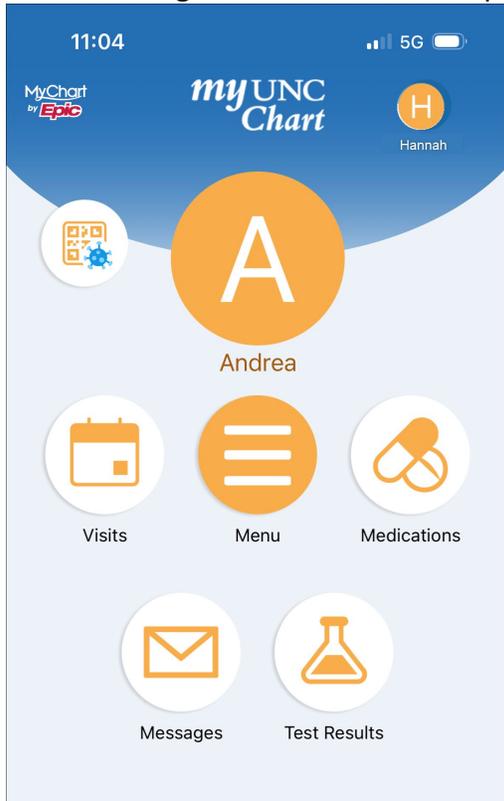


8. Once you see your attached image at the bottom of the window, click **Send**.  
\*\*\*You can attach up to three images\*\*\*

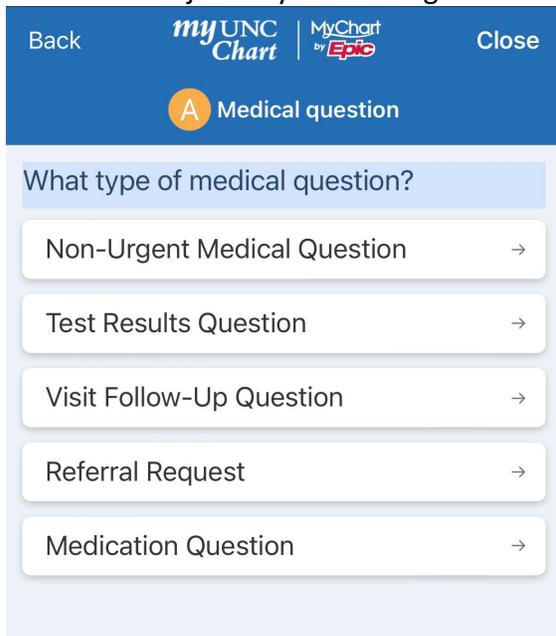


## Uploading Photos to My UNC Chart Using a Smartphone (Andriod or iPhone)

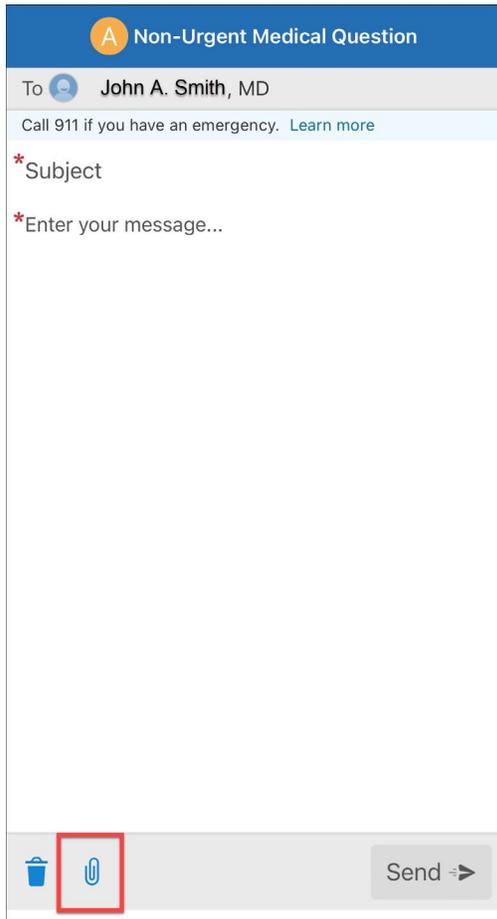
1. Select **Messages** icon from the homepage or under the **Communications** section of the **Menu**.



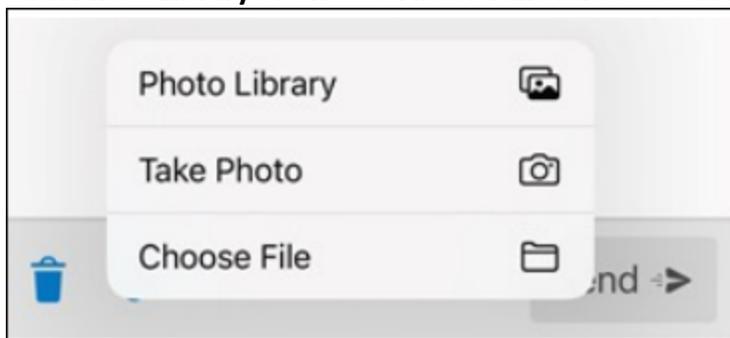
2. Click **Send a message**.
3. Select **Ask a medical question**.
4. Select the subject of your message from the list of options.



5. Select who should receive the message.
6. Enter a subject and compose your message then click the **paperclip icon** to attach an image.



7. Click **Photo Library** or **Choose File** or **Take Photo** to take a new picture.



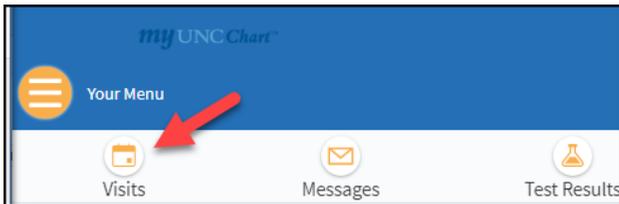
8. Once you see your attached image at the bottom of the window, click Send.  
\*\*\*You can attach up to three images\*\*\*

The screenshot shows a mobile application interface for sending a message. At the top, there is a blue header with 'Back', 'myUNC Chart | MyChart by Epic', and 'Close'. Below the header, a blue bar contains a white circle with the letter 'A' and the text 'Non-Urgent Medical Question'. The recipient is listed as 'To John A. Smith, MD'. A light blue banner below the recipient name says 'Call 911 if you have an emergency. Learn more'. The subject line is marked with a red asterisk and says 'Subject Enter subject here'. The message body is marked with a red asterisk and says 'Enter your message... Enter message here'. At the bottom left, there is an attachment area with a blue 'X' icon, the text 'image.jpg', and '3 attachments allowed'. At the bottom right, there is an orange 'Send ->' button, which is pointed to by a red arrow.

# Visits

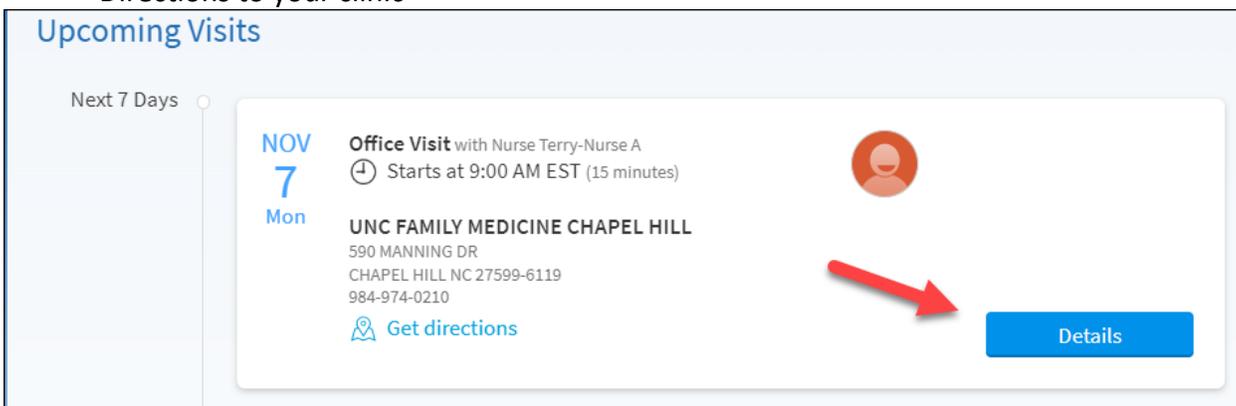
## View your past or upcoming appointments

You can view your past or future appointments by going to **Visits** in the toolbar:



Select an upcoming scheduled appointment or click **Details** to see information such as:

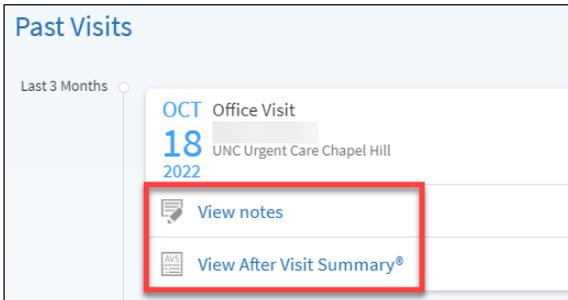
- The date, time, and location of the visit
- Any pre-visit instructions from the clinic
- Directions to your clinic



If an upcoming appointment is eligible for eCheck-In, you can use it to take care of the following tasks before you arrive at the clinic:

- Verify or update insurance and demographic information
- Verify or update medications, allergies, and current health issues
- Answer appointment-related questionnaires
- Verify guarantor information
- Electronically sign documents that may be available
- Update emergency contacts
- Pay visit copays
- Pay pre-payments and balance payments

For past appointments, you can click **View After Visit Summary**<sup>®</sup> to see a summary of the care you received during your visit. You also can view any of your provider’s visit notes that are shared with you by clicking **View notes**.

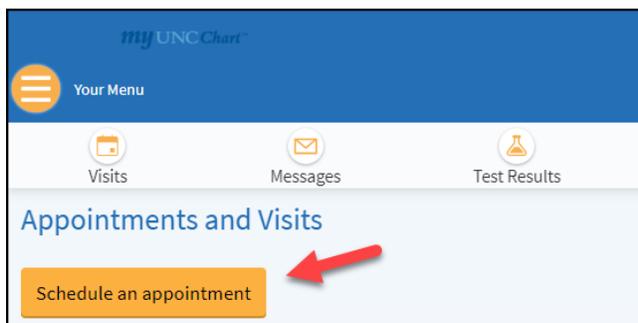


## Schedule or request an appointment

Depending on your provider and their clinic, you may be able to schedule your own appointment or request an appointment with a particular provider or for a specific reason during a preferred date range.

*To schedule an appointment:*

1. Go to **Visits > Schedule an Appointment**.



2. Choose one of your providers listed or select a reason for scheduling an appointment.

## Schedule an Appointment

If you are experiencing an emergency, such as difficulty breathing or chest pain, call 911 or seek immediate treatment.

### Schedule with a specific provider

Choose a provider who matches your needs.



Louise R King, MD  
Primary Care Provider  
Internal Medicine



OR

### Tell us why you're coming in

Choose a specific reason for scheduling an appointment.

#### Schedule a Video or Phone Appointment with Your Provider

This option is to schedule a phone or video visit with your provider. →

#### Schedule a Video or Phone Appointment with UNC Virtual Practice

\*\*This is not a visit with your existing care team.\*\* This option schedules a telehealth visit with a central group of UNC Health providers for primary care symptoms. →

#### Request an Appointment

This option is to request an appointment. Appointments may be in-person, by phone or video. →

#### Mammography Screening



#### Covid-19 TEST



#### Covid-19 VACCINE



#### Allergy Shot



#### Flu Shot



3. Select the type of appointment you would like to schedule.
4. Choose a location that works for you (if applicable).
5. Select an appointment from the list of available dates and times.

Monday November 7, 2022

Family Med Physician, MD



2:45 PM

3:00 PM

4:15 PM

4:30 PM

Tuesday November 8, 2022

Family Med Physician, MD



8:00 AM

8:15 AM

8:30 AM

8:45 AM

9:00 AM

9:15 AM

6. Complete scheduling by verifying the appointment information including provider, date, time, and location. Enter any information within the text box that you would like the provider to address during your visit.

### Schedule an Appointment

If you are experiencing an emergency, such as difficulty breathing or chest pain, call 911 or seek immediate treatment.

---

 Edit  Edit  Edit  Edit 

**You're almost done...**  
This time slot is reserved for you until 12:50 PM. Please complete scheduling by then.

 RETURN CONTINUITY with Family Med Physician, MD

 Monday November 7, 2022 Edit  
Arrive by 2:35 PM  
Starts at 2:45 PM (20 minutes)

 UNC FAMILY MEDICINE CHAPEL HILL  
590 MANNING DR  
CHAPEL HILL NC 27599-6119  
984-974-0210

\*What is the most important thing you want addressed during this visit?

**Before scheduling...** 

Favorite this appointment to easily schedule again later

If everything looks correct, click the button below to schedule.

 Schedule it

7. Click **Schedule it**.

*To request an appointment:*

1. Go to **Visits > Schedule an Appointment**.
2. Select **Request an Appointment** when prompted to choose which kind of appointment you wish to schedule.

What kind of appointment are you scheduling?

**Ongoing Health Issue**  
Issue I am already receiving care for and/or follow-up for known issue. →

**New Health Issue**  
Issue I have not yet received care for or I am just noticing. →

**Adult Physical**  
For example: Annual physical, college physical, work physical, etc. →

**Well Child**  
For example: well baby visit, kindergarten physical or school physical. →

**Request an Appointment**  
This option is to request an appointment. Appointments may be in-person, by phone or video. →

3. Review the location and provider and enter preferred dates and times you would like to have an appointment. Within the text field, include pertinent details of what you would like to address during your visit.

Confirm the request details you are about to send:

Request an Appointment with Family Med Physician, MD

Date and time to be determined  
A scheduler will reach out to you about a specific time

UNC FAMILY MEDICINE CHAPEL HILL  
590 MANNING DR  
CHAPEL HILL NC 27599-6119  
984-974-0210

Preferred dates:  
MM/DD/YYYY to MM/DD/YYYY

Preferred times:  
**All available times** Filter times

\*What is the most important thing you want addressed during this visit?

4. Click **Send request**.

After you submit your request, someone from the clinic will contact you to verify an appointment date and time.

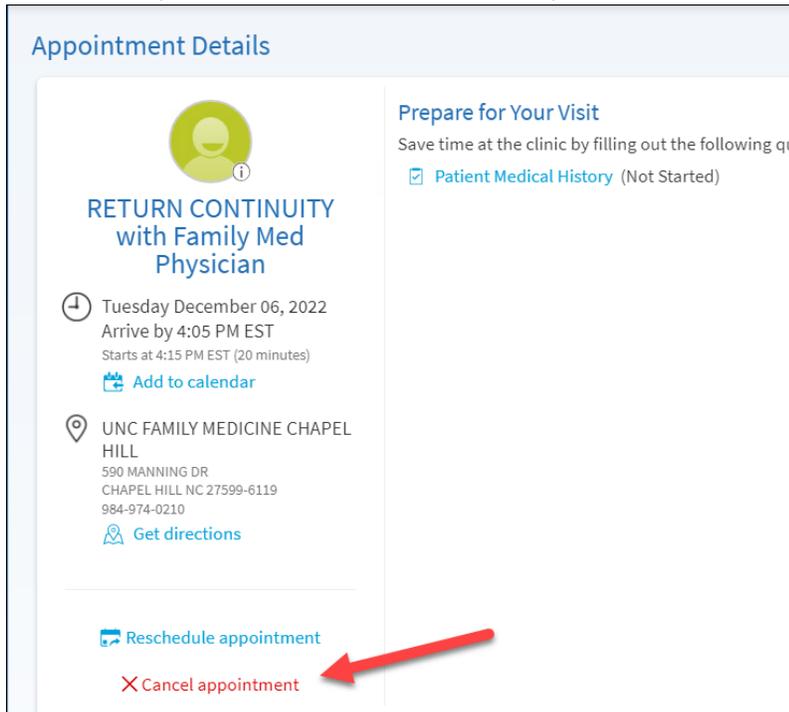


You can “favorite” an appointment to make it easy to schedule the same type of visit again later with the same provider and/or department.

## Cancel an appointment

Depending on the date and time of your next appointment, you might be able to cancel it through My UNC Chart. Some appointments cannot be canceled online, and you will need to call the clinic to cancel your appointment.

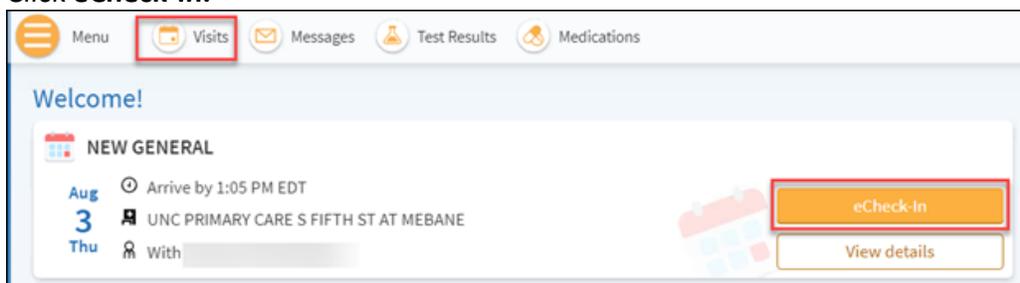
1. Go to **Visits > Appointments and Visits**. Select the appointment from the list or click **Details**.
2. Click **Cancel**, enter cancellation comments, and click **Confirm Cancellation**.



## eCheck-In

Save time by updating your health information online before your visit.

1. Go to **Visits** from the top menu of the **Welcome** screen.
2. Navigate to the **Upcoming Visits** section.
3. Click **eCheck-In**.



Once you have clicked on **eCheck-In**, follow the prompts to update your information. You will be able to:

- Verify and update demographics
- Verify insurance and guarantor
- Verify and update contacts
- Verify and update medications, allergies, and current health issues
- Make pre-payments
- Answer questionnaires if any are needed
- Sign documents

*The information you provide will be reviewed during your visit.*



**eCheck-In** is available 7 days prior to your appointment. You will receive an email as soon as **eCheck-In** is available for you to complete. The **eCheck-in** reminder will have the **Check in online** button.

## Receive medical care online with an E-Visit

If your provider offers E-Visits, you can answer a questionnaire about your symptoms and send photos or videos as needed for your provider to review. Your provider then can offer medical advice for at-home care or let you know if you should schedule an appointment for treatment.

To submit an E-Visit:

1. Go to **Menu > E-Visit**.
2. Review the E-Visit Terms and Conditions, and click **Accept**.
3. Select the Country and State where you are currently located then click **Confirm**.
4. Based on your concern, choose from a list of symptoms, select a recipient, and click **Continue**.
5. Confirm your insurance and demographic information.
6. Proceed with the E-Visit by answering a series of questions related to your symptom selection.
7. Once submitted, your provider will contact you for next steps.

## Have a video visit with your provider

You can schedule a video visit to have an online face-to-face interaction with your provider from the convenience of your home or work. Video visits are scheduled in the same way as other appointments. For more information about scheduling, refer to [Schedule or request an appointment](#).



If you need care right away, you might be able to use an on-demand video visit to talk to a provider now rather than scheduling a video visit appointment for later. Go to **Menu > Virtual Care Now** to connect with an available provider.

## Prepare for your video visit

To ensure a smooth connection, complete the following tasks well in advance of your video visit:

### *If using a computer:*

- Make sure you have a webcam set up. This can be a webcam that is part of a laptop or a separate USB webcam.
- Use one of the following internet browsers: Google Chrome, Microsoft Edge, Firefox or Safari (Internet Explorer will not work with video visits).
- Ensure you are using a wired internet connection or Wi-Fi.

### *If using a smartphone:*

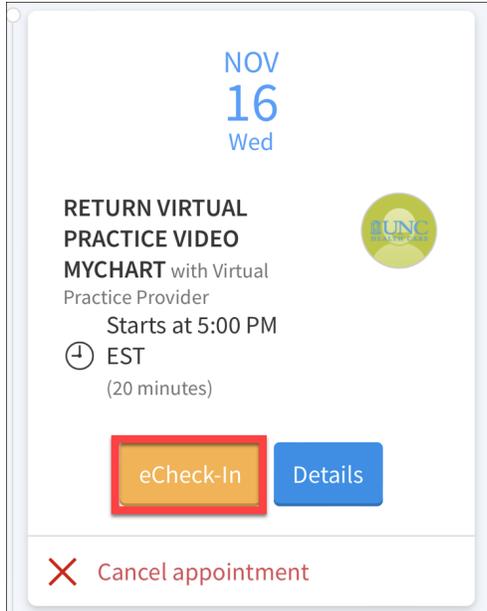
- Ensure you have downloaded the My UNC Chart app and are able to sign into your account.
- Make sure you are connected to Wi-Fi as mobile data will not work for a video visit.

After you've done these things, you can do a test to make sure everything is working in My UNC Chart. You should complete this test at least 30 minutes prior to your video visit start time.

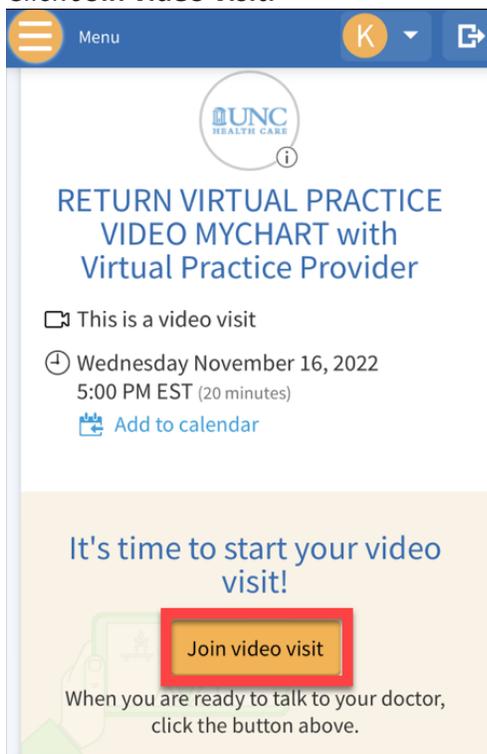
## Accessing and connecting to your video visit

### My UNC Chart mobile

1. Go to **Visits > Appointments and Visits**.
2. Locate the video visit and complete **eCheck-In** for your scheduled video visit.

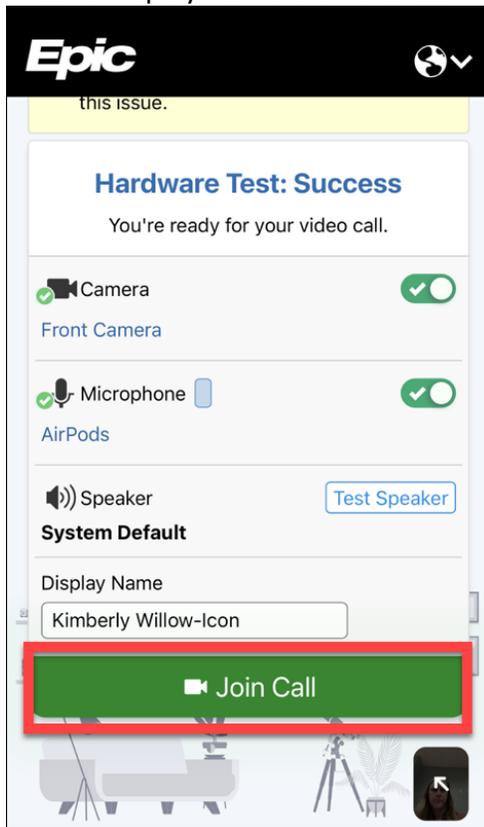


3. Confirm insurance, demographic information and complete the Video Visit Questionnaire.
4. Click **Join video visit**.



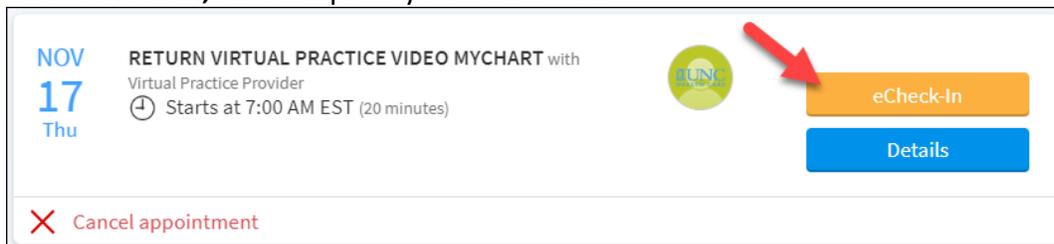
5. Select **Continue** to test your microphone, speaker, and video.

6. Click **Allow** for microphone and camera use.
7. Enter a Display Name then click **Join Call**.

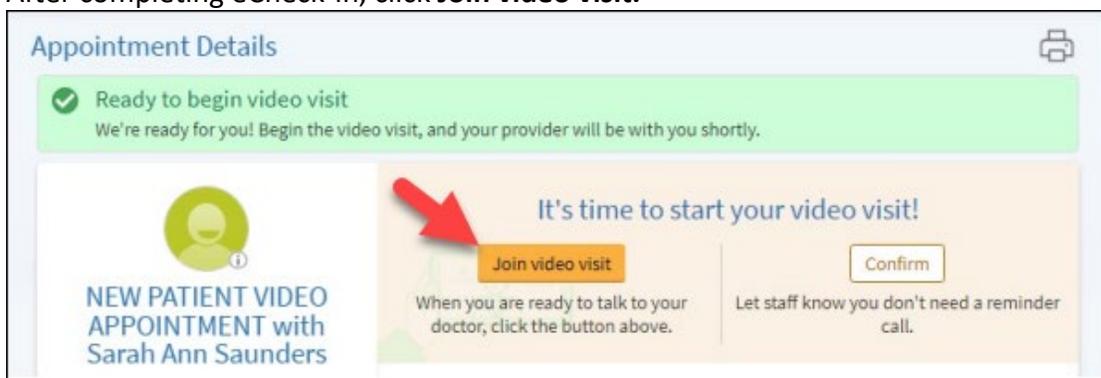


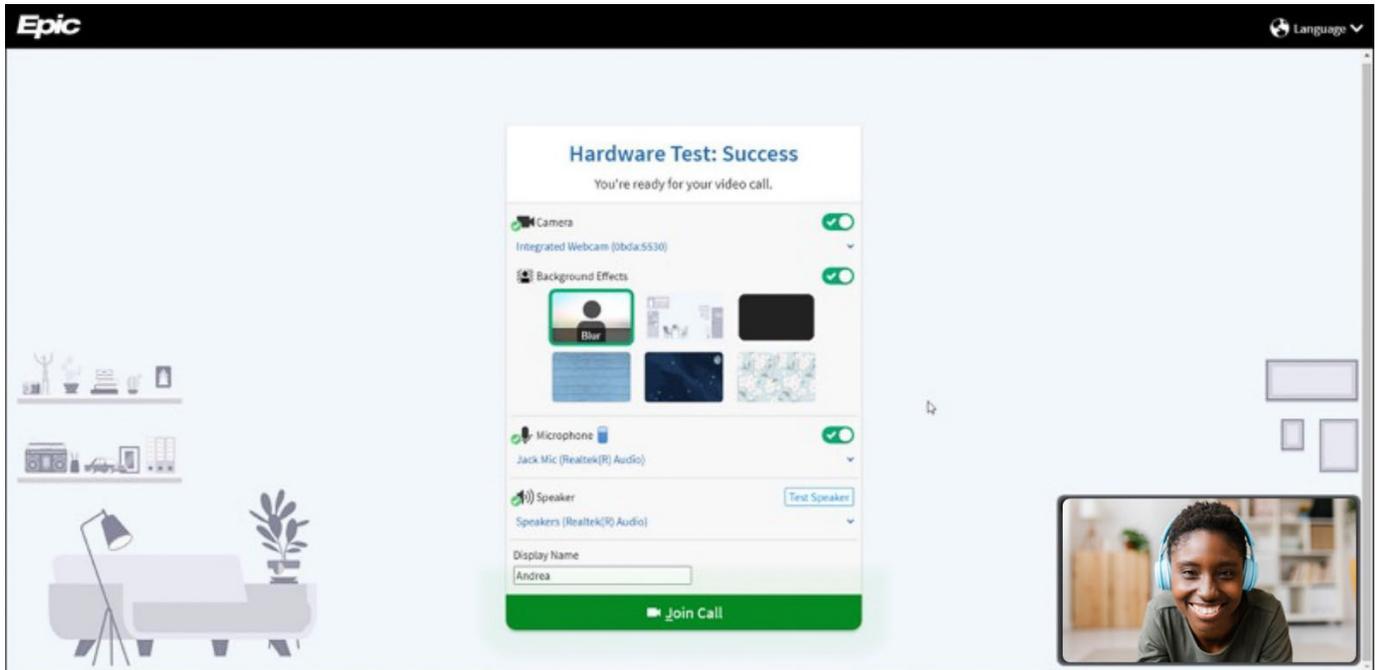
### My UNC Chart Computer (Web Browser)

1. Your video visit appointment will be visible on the Welcome Page or within **Visits > Upcoming Visits**
2. Click **eCheck-In**, and complete your eCheck-In.



3. After completing eCheck-In, click **Join video visit**.





4. Click **Continue** to test your camera, microphone, and connection.
5. Select **Allow** to use your camera and microphone.
6. Click **Join Call** and wait for your provider to join the video session.



When it's time to connect to your video visit, an alert appears on the My UNC Chart home page. You also can click the link in this alert to connect.

After you connect to the video visit, you might need to wait for your provider to connect.

# Family Access

If you have access to your family members' medical records, you can view most of the information in their records in the same way that you view your own. Some things that might be particularly useful include:

- Viewing or printing your child's immunization record
- Viewing your child's growth charts
- Viewing a family member's test results

## To submit a Proxy Access Request

1. Go to **Menu > Proxy Access Request**
2. Click **Complete This Form** under the applicable level of access
  - a. Parent/Legal Guardian Access to Minor Patient's Health Information in My UNC Chart
  - b. Authorization for Another Person to Have Access to My Health Information in My UNC Chart
  - c. Authorization for Health Care Power of Attorney or Legal Guardian to Access Health Information in My UNC Chart

If you're a parent, you can have full access to your child's record through age 12. For children ages 13 to 17, the health information you will be able to view will be limited. When your child turns 18, your access will be turned off completely. Your teenaged child can choose to give you full access in both cases by completing and submitting the proper forms.

This section explains how to access a family member's record and how to access growth charts and immunizations in a child's record.

## Access a family member's record

After you've received permission, you can view a family member's records by clicking the photo or name for that family member in My UNC Chart.

After you read the proxy access disclaimer, click **Accept** to continue to your family member's chart.

# Invite someone else to access your record

1. Go to **Menu > Sharing Hub**
2. Select **A family member, close friend, or caretaker.**

**Sharing Hub**  
There are many ways to share your health information. Let us help you find what you need.

Who do you want to share your health information with?

-  **Yourself**  
You might be trying to get a copy for your personal reference.
-  **A family member, close friend, or caretaker**  
This person might be taking care of you or helping you track your health.
-  **A healthcare provider**  
A healthcare provider is a health professional (for example, a doctor, dentist, nurse, or social worker) or a healthcare organization.
-  **Anyone else**  
This might be someone at another organization, like your insurance or workplace.

3. Choose how you would like to share your health information. To invite someone to have continued access, select **Give ongoing access to your My UNC Chart account.**

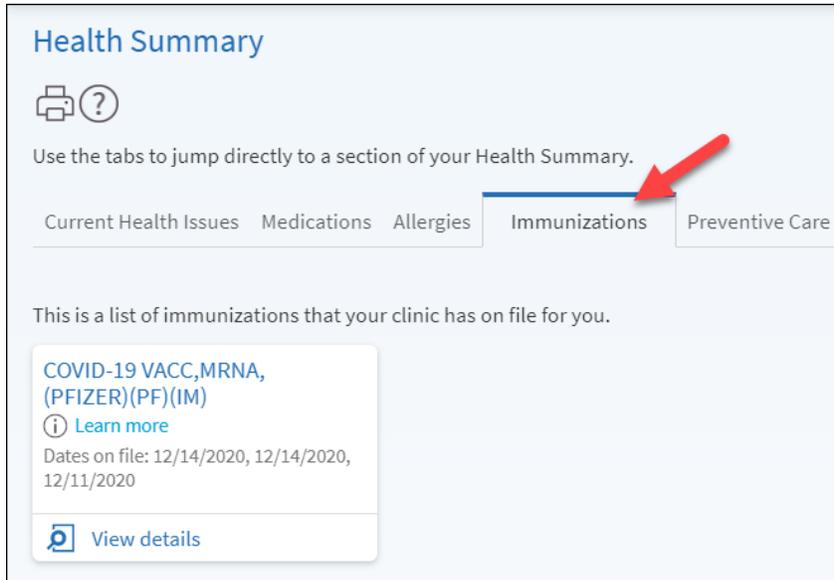
How do you want to share your health information with a family member, close friend, or caretaker?

-  **Give ongoing access to your My UNC Chart account**  
This person might be taking care of you or helping you track your health.
-  **Download or send a snapshot**  
This will contain your health summary and/or specific visit details. This is available immediately.
-  **Request a formal copy**  
You can request specific pieces of information, including lab images, or request everything. This request might take a few days for your healthcare organization to process.

4. Select **+ Invite someone**
5. Enter that person's name and email address, confirm the level of access, and click **Send Invite**. The invitation then appears as Pending at the top of the page.
  - After you send the invitation, the recipient receives an email to notify them that you've invited them to have access to your account. From this email, they can click a link and log into My UNC Chart where they must enter your date of birth to confirm they know you and accept the invitation.
6. After the person you've invited accepts the invitation, you'll receive a message to let you know, and the **Pending** label is removed next to that person's name on the **Friends and Family Access** page. You can return to this page at any time to edit or revoke that person's access.

## View and print your child's immunization record

1. When you are in your child's record in My UNC Chart, go to **Menu > Health Summary**.
2. Select the **Immunizations** tab. You can see the immunizations your child has received and the dates your child received them.
3. Click **View details** to view the list of doses on file. Click on the immunization name to learn more.



To open a printer-friendly summary of your child's immunizations, click .

## View your child's growth charts

To view your child's growth charts, open your child's record and go to **Menu > Growth Charts**.

You can customize the view of the growth chart by:

- Choosing a different Chart Set. For example, you can switch between growth charts provided by the Centers for Disease Control (CDC) and the World Health Organization (WHO).
- Changing the Chart Type. For example, you can switch the view from length-for-age to weight-for-age or Body Mass Index-for-age.

You also can view the growth chart with a different unit of measure (metric or standard) by selecting the option for that unit of measure.

If you want a copy of the growth chart for your records, click .

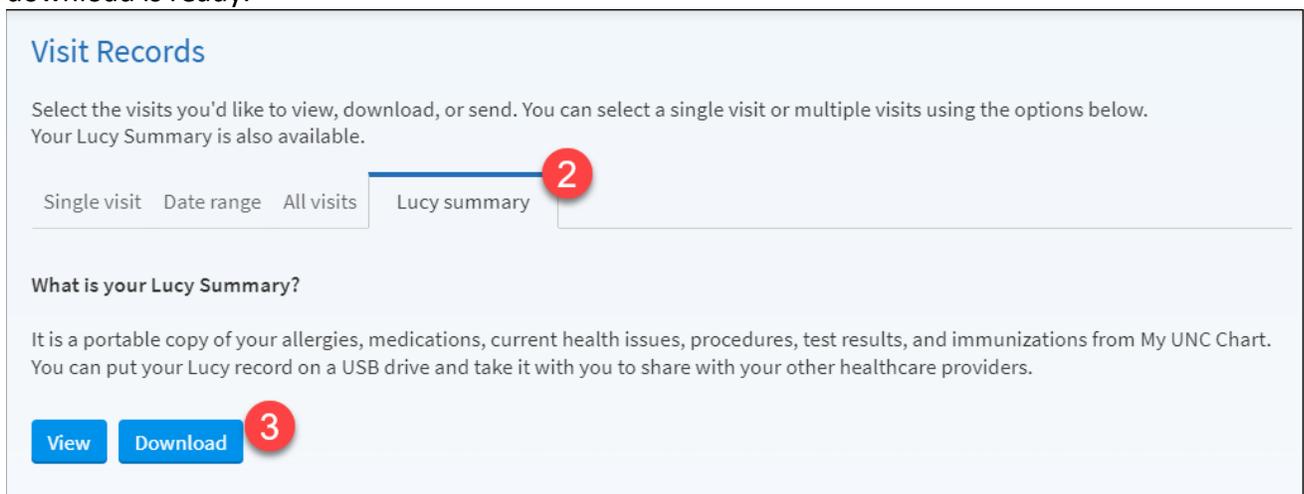
# Medical Record Access and Sharing

The My UNC Chart patient portal has several different features that allow you to access your health records and share them with other people. For more information about accessing family members' records, refer to [Family Access](#).

## View or download your medical record

You can save your health summary to a USB drive to carry with you in case of emergency. The portable summary includes all the allergies, medications, current health issues, procedures, test results, and immunizations you can see in My UNC Chart. If necessary, the information on your USB drive can be uploaded into a personal health record or another healthcare organization's electronic health record.

1. Go to **Menu > Document Center**.
2. Click **Visit Records**, and select the **Lucy Summary** tab.
3. Click **Download**, and then click **Request** for the message that appears. You'll be notified when your download is ready.

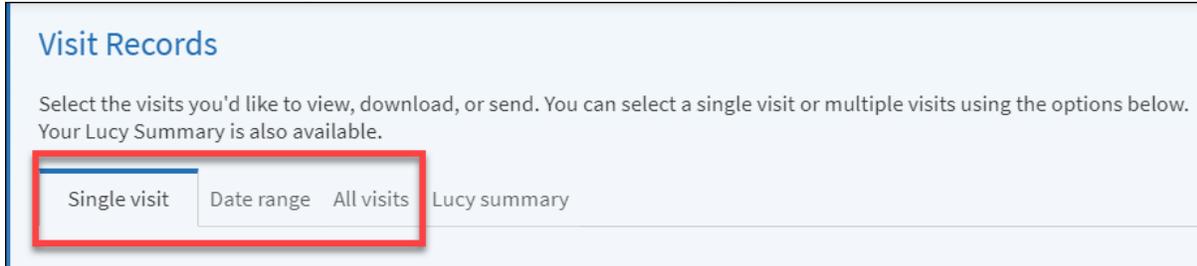


4. When you are prompted to save or open the file, click **Save**, and save it to an accessible location on your computer.
5. Open the folder and extract the .zip file.
6. To view your medical record, open the PDF file in the folder.

## View, download, or send visit records

You can view, download, or share your record for a specific visit or set of visits.

1. Go to **Menu > Document Center** and click **Visit Records**.
2. Select a visit on the **Single Visit** tab or use the **Date Range** tab or **All Visits** tab to select multiple visits.



Then:

- Click **View** to view a copy of the visit summary.
- Click **Download** to save a copy of the visit summary for your records.
- Click **Send** to send a copy of your visit summary to another provider. This might be useful if you need to keep another provider, such as a specialist who works outside of your clinic, informed about your health.

## Download medical records you've requested

If you've requested a copy of your medical record, you can download and view it from My UNC Chart rather than having to wait for a paper copy to arrive in the mail.

1. Go to **Menu > Document Center** and click **Medical Record Requests**.
2. Locate the record you want to view and click **Download**.
3. You will receive a message if the record is password protected. Click **Continue Download**.
4. Click **Save** to save the file to your computer and then open it, or you can click **Open** to open it without saving it to your computer.
5. If the record is password protected, click **Show Password** on the Requested Records page to view the password you need to access the document and enter it to view the document.

To request new medical records click **Request Medical Records** from within the **Medical Record Requests** activity:



### Medical Record Requests

You have no requested records to display.

To request new medical records click here [Request Medical Records](#)

## Share your medical information with someone else

Share Everywhere is a way for you to share your medical information with the people who are taking care of you. Using My UNC Chart, you can generate a share code and provide it to the person you want to share your health data with. This might be a doctor, chiropractor, physical therapist, dentist, or school nurse, for example. The share code recipient enters that code and your date of birth on the Share Everywhere website to receive one-time, temporary access to your health information. The person who views your information can also write a note back to your health system to help keep your care team informed of the care they provide.

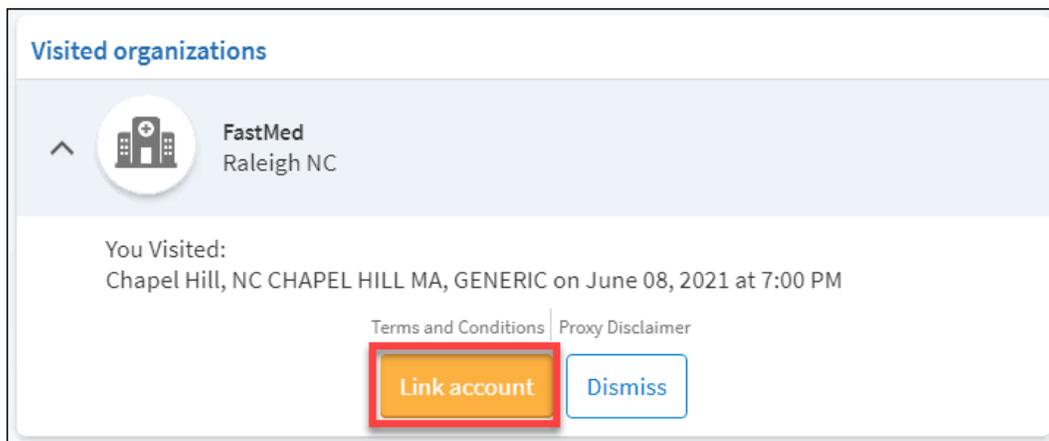
1. Go to **Menu > Share Everywhere**.
2. Enter the name of the person who will be viewing your record and request the share code.
3. Tell that person to go to [www.shareeverywhere.com](http://www.shareeverywhere.com) to enter the code along with your date of birth.

## See your medical information from other healthcare organizations

If you've been seen at another healthcare organization, you might be able to view information from that medical record in My UNC Chart. You can do this through a feature referred to as Care Everywhere. The information you might see from other organizations includes:

- Allergies
- Care team
- Health issues
- Medications
- Messages
- Test results
- Visits

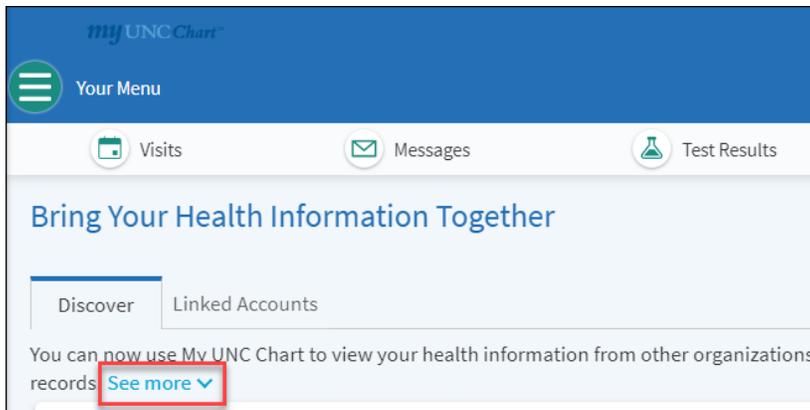
To view this information, you must link your account. Go to **Menu > Link My Accounts** to get started. Then, select your account from the list and click **Link Account**.



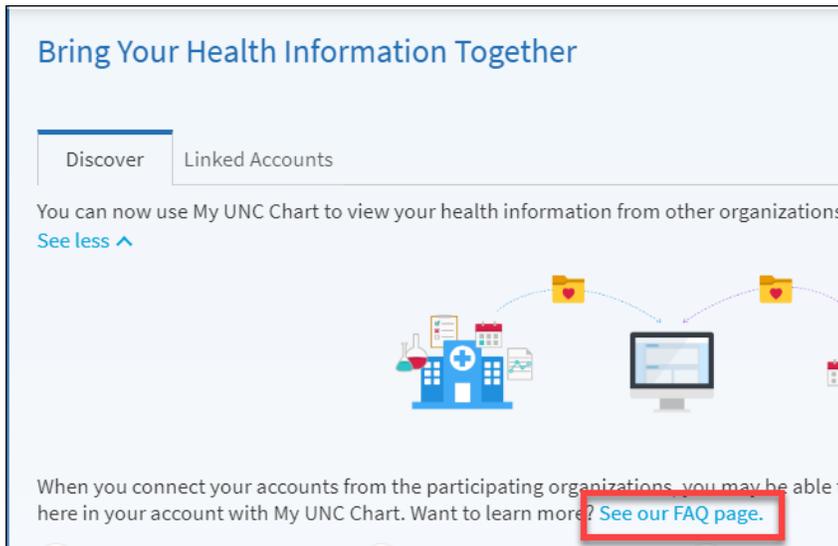
After you've linked your accounts, information from the other organization appears in My UNC Chart with an  icon.

For more information about how linked accounts work and what information you can see from each healthcare organization:

1. Go to **Menu>Link My Accounts**
2. Under the **Discover** tab, click **See more**



3. Click the link for the FAQ page.



# Billing and Insurance

## View your outstanding balance

To view an outstanding account balance for any of your accounts, go to **Menu > Billing Summary**.



If you need immediate access to billing records for a patient, please contact the Billing Call Center at 1-800-594-8624 or 984-974-2222 to request an itemized statement.

If you have any other questions or concerns about charges, please contact the My UNC Chart Support Line: (888) 996-2767, M-F from 8 AM – 7 PM.

## Make a payment for an outstanding account balance

1. Go to **Menu > Billing Summary**.
2. Click **Pay Now** to make a payment.
3. Enter the amount to pay along with your credit card or bank account information. Click **Continue**.
4. Review your payment information, and click **Submit Payment**.



If you can't pay your entire balance all at once, you can set up a payment plan to pay a smaller amount each month. Start the process by applying [online](#), and we'll work with you to determine a payment arrangement or offer financial assistance based on your financial situation.

## Sign up for paperless billing

1. From the Billing Summary page, click the paperless billing alert.



Save time while you save paper! Sign up for paperless billing.

2. If you want to receive an email or text message when a new paperless statement is available online, enter and verify your email address or mobile phone number, and select the corresponding check box to receive notifications.
3. Select the **I understand that I will no longer receive statements in the mail** check box and click **Sign Me Up**.

## Get a price estimate for medical care

To help you plan for upcoming care, such as a surgery or other procedure, you can get an estimate from My UNC Chart. The estimate is based on your insurance and what other patients have been charged in the past.

1. Go to **Menu > Billing** and click **Create Estimates**.
2. Answer the series of questions related to your health coverage.

3. Based on your selections you may be prompted to call the UNC Health Estimates Team at (984) 215–6899, Monday – Friday, 8:30 AM – 4:30 PM (except major holidays). Have the following information available when you call:
  - Service name and CPT / procedure code
  - Current insurance carrier and subscriber ID
  - Insurance plan details, including your remaining deductible, coinsurance, and remaining maximum out-of-pocket, if applicable

## Request assistance with your medical bills

If you need help paying your medical bills, you can submit a financial assistance application to see what resources are available to you. Go to **Menu > Financial Assistance** to get started. You'll need to provide the following information to complete the application:

- How many people live in your household
- How much you receive from all sources of income
- Supporting documents to verify the information you provide

You will be prompted to complete the Financial Assistance application and add your electronic signature and date. After you submit your application, a Financial Assistance Specialist will contact you to follow up.

## Review and update your insurance information

To review the insurance information your clinic has on file, go to **Menu > Insurance Summary**. Click **View coverage details** for the payer or plan to see more information about the coverage, such as your deductible and maximum out-of-pocket expenses.

To update your insurance information, make any of the following changes:

- Request a change to an existing coverage.
- Remove a coverage.
- Add a new coverage. New coverages are submitted for verification when you log out of My UNC Chart.

# Preferences and Administrative Features

## Personalize My UNC Chart

There are three ways you can personalize how My UNC Chart appears for you and each of your family members. For each account you have access to, you can:

- Change the name that appears under that person's photo.
  - Add or change the photo. Note that photos you upload through My UNC Chart are visible to medical staff, so you should only use a photo that shows each person's face.
1. Go to **Menu > Personalize**.
  2. Click **Edit**.
  3. Make any of the changes described above and then click **Save**.

## Update your personal information

You can update your address, phone number, email address, and other personal details at any time so your clinic always has the most up-to-date information in your record.

1. Go to **Menu > Personal Information**.
2. Click **Edit** in the section for the information you need to update.
3. Confirm that your updated information is correct, and then click **Save Changes**.

## Customize your notification preferences

My UNC Chart can send you notification by email or text message when there is new information available in your My UNC Chart account. You can specify your preferences for different types of notifications, including new messages, test results, billing statements and letters, prescriptions, appointment updates, and more.

1. Go to **Menu > Communication Preferences**.
2. Select notification options for a group of notifications (for example, Appointments or Messages) or expand a notification group to select options for individual notifications you want to receive.
3. Update your email address and mobile phone number if needed.

## Change your My UNC Chart password or update your security question and answer

To ensure that your medical information stays protected, consider changing your My UNC Chart password periodically. To do so, go to **Menu > Security Settings**. From this page, you also can update the security question and answer that are used when you forget your My UNC Chart username or password.

# Protect your account with two-step verification

You can ensure your account stays secure even if someone else has your username or password by turning on two-step verification. When this feature is turned on, you must enter a code that is sent to you by email or text message to log in to My UNC Chart, in addition to using your username and password.

When you log in to My UNC Chart for the first time, you might be prompted to verify your email address and phone number to enable two-step verification. If you decide to turn off two-step verification, you can turn it on again later.

1. Go to **Menu > Security Settings** and click **Turn on Two-Step Verification**.
2. Confirm your email address or phone number, enter your My UNC Chart password, and then click **Continue**.
3. Select whether you want to receive the security code to turn on two-step verification by email or text message.

# Mobile Apps

My UNC Chart for iOS and My UNC Chart for Android are portable versions of My UNC Chart you can use to manage your health information on the go. The mobile apps contain many of the same features as the My UNC Chart website, allowing you to do all the following, and more:

- View test results
- Send and receive messages
- Schedule and confirm upcoming appointments and view visit summaries for past appointments
- View your health summary, including allergies, immunizations, current health issues, and medications
- View preventive care procedures and when they are due
- Request and pay for medication refills
- View billing statements and pay balances due and visit copays
- Access family members' charts

If you have an iOS device, you can pair it with Apple Watch™. With My UNC Chart for Apple Watch, you can:

- See alerts for new information in My UNC Chart
- View upcoming appointments
- Read messages
- Review your medication list

## Download the My UNC Chart app

To install the My UNC Chart app, go to the App Store or Google Play Store and search for "My Chart."

After you open the app, select your primary healthcare organization from the list of organizations. You can search for your organization by name, state, or ZIP code. You can easily add or switch between your My UNC Chart accounts at different healthcare organizations using the **Switch Organizations** button on the login screen or the **Switch Organization** menu option after you've logged in.

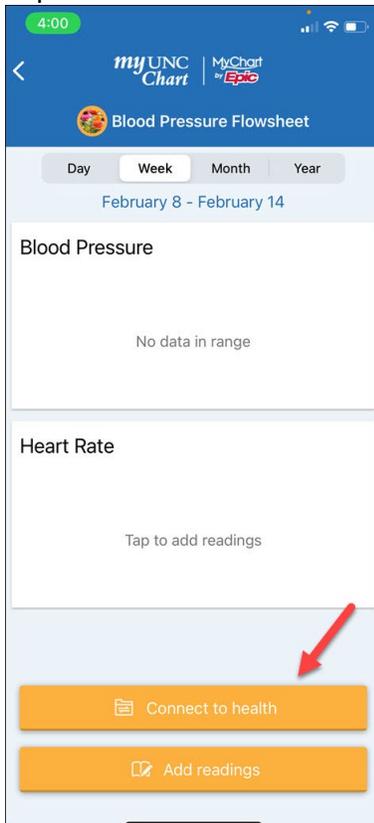
# Connect your My UNC Chart account to Apple Health or Google Fit

If your provider has assigned you a patient-entered flowsheet for tracking your health data, you can connect My UNC Chart to Apple Health or Google Fit to automatically pull in data from other health and fitness apps or devices.

1. In the My UNC Chart mobile app, open the **Track My Health** activity.



2. Tap **Connect to Health** or **Connect to Google Fit** at the bottom of the screen.



3. Choose the data you want to share with My UNC Chart by tapping the toggle button for each type of data.
4. Tap **Done**. At this point, any data that was already stored in Health or Google Fit is automatically synced to My UNC Chart.

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