HEALTH HARBOR

Patient Portal User Guide

How patients and the people who look after them book visits, check in, message the care team, ask for refills, see their records and pay their bills.

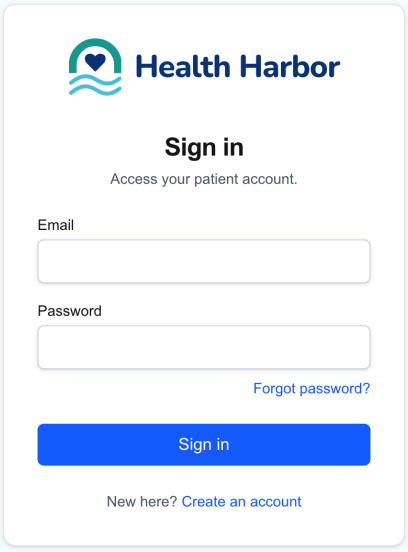
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For Health Harbor patients and caregivers · Version of November 12, 2026 · Screens show the demo patient Frank Dad, whose records are made up

1. Signing in

The portal is at healthharbor.app. It works in any browser, on a phone or a computer.



1. Open healthharbor.app. If you aren't signed in, you land on this page.
2. Enter your **Email** and **Password**, then choose **Sign in**.
3. If you've turned on two-step verification, enter the 6-digit code from your authenticator app or your email.
4. You arrive on **Home**, which welcomes you by name.

New here, or forgot your password?

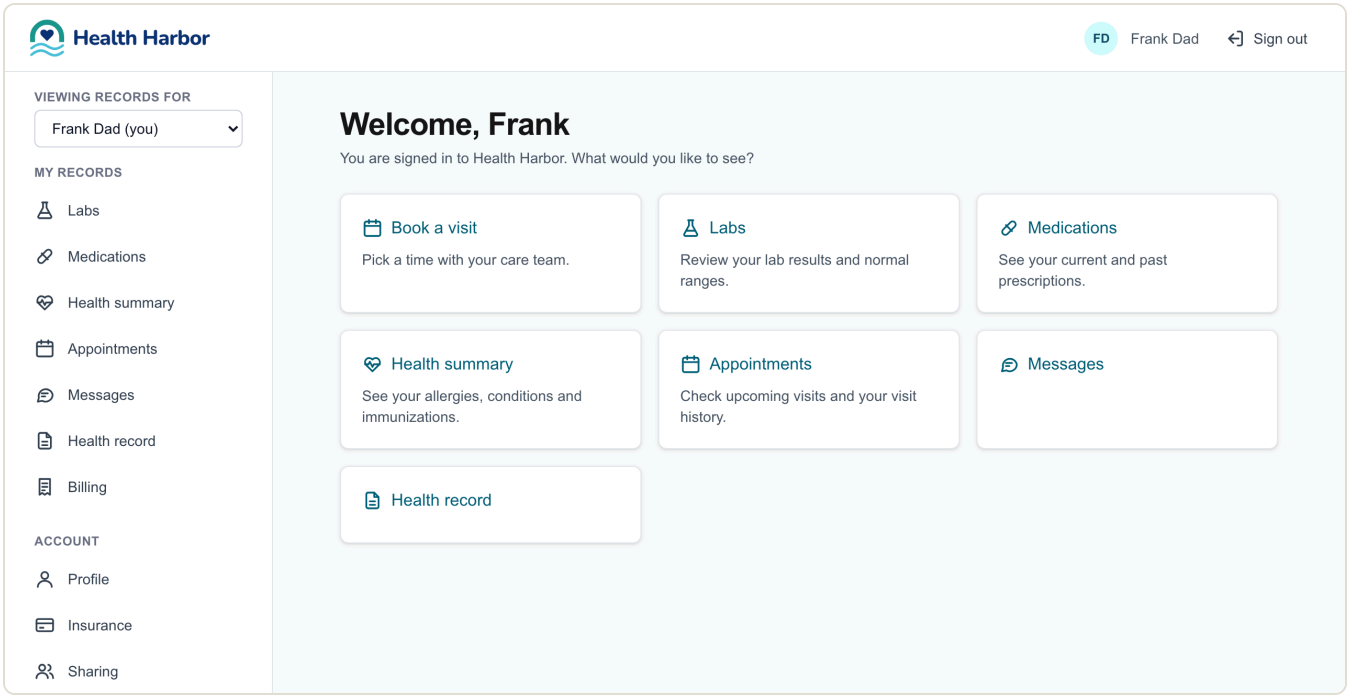
- **Create an account** under the sign-in form sets up a login.
- **Forgot password?** emails you a link to choose a new password.
- If someone gave you access to their records, their invitation email has a link to set up your login.

Signing out

Choose **Sign out** at the top right, next to your name. Always sign out on a shared computer.

2. Finding your way around

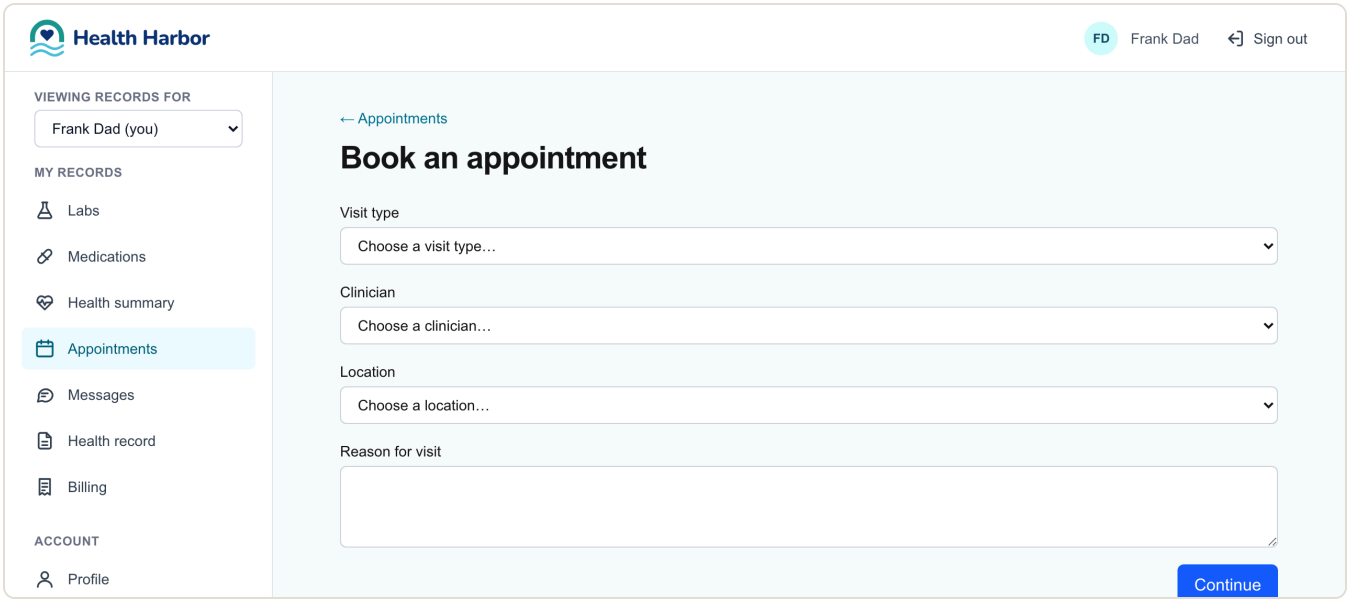
Home links to the things people do most. The menu on the left has everything.



MENU ITEM	USE IT TO
Viewing records for	Switch to a family member you look after (section 12).
Labs	See lab results with their normal ranges.
Medications	See current and past prescriptions, and ask for a refill.
Health summary	See allergies, conditions and immunizations.
Appointments	Book, check in, reschedule or cancel visits, and read visit notes.
Messages	Write to your care team or the clinic.
Health record	Download or email your whole record.
Billing	See what you owe and pay by card.
Profile, Insurance	Keep your contact details, emergency contacts and insurance cards up to date.
Sharing, Activity, Security	Choose who can see your records, see what's happened on them, and protect your sign-in.

3. Booking a visit

Book from your care team's open times, at any hour.

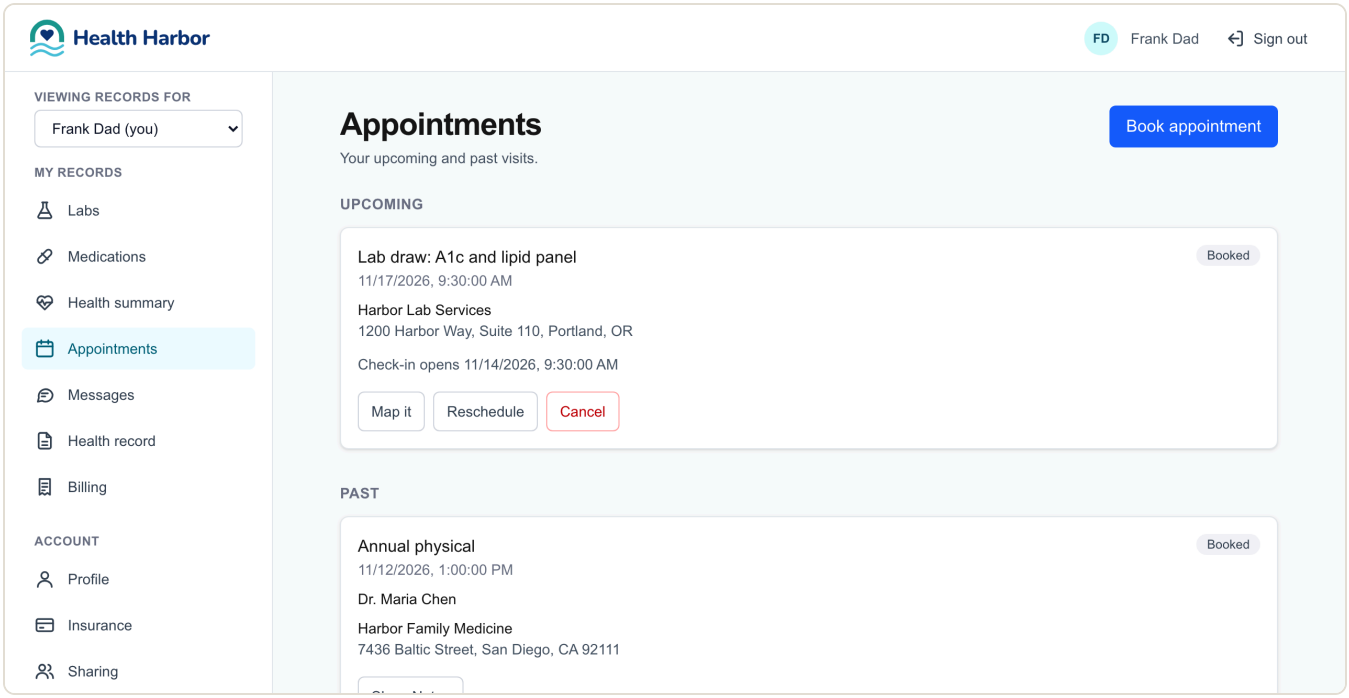


1. Choose **Book a visit** on Home, or **Book appointment** on Appointments.
2. Pick the **Visit type** (such as *Annual physical*, *Sick visit* or *Telehealth video visit*), then the **Clinician** and **Location**, and say what the visit is for in **Reason for visit**.
3. Choose **Continue** and pick one of the open times.
4. Confirm. You get an email with a calendar invite attached, and the visit shows under *Upcoming*.

How far ahead? Each visit type needs some notice: a sick or video visit can be booked a couple of hours ahead, a follow-up a day ahead, and an annual physical a week ahead. If a time you want isn't offered, try another day or another clinician, or message the clinic's Scheduling inbox.

4. Your appointments

Upcoming visits first, then your visit history.



- Each visit shows its time, the clinician, the location and its status.
- **Map it** opens the clinic's address in your maps app.
- **Reschedule** offers open times to move the visit to. If none suit you, send the front desk a request with the days and time of day you prefer; the visit shows **Reschedule requested** until they book a new time.
- **Cancel** cancels the visit, and the time opens up for someone else.
- When check-in opens, the visit offers **Check in** (section 5). Until then it says when check-in opens.
- For a past visit, **Show Notes** shows the notes your clinician shared.

5. Checking in online

Skip the clipboard. Check in from your phone in the days before your visit.

Check-in opens a few days before the visit (usually 3 days; a week for an annual physical, a day for a sick visit). You'll get an email when it opens, and the visit on Appointments offers **Check in**.

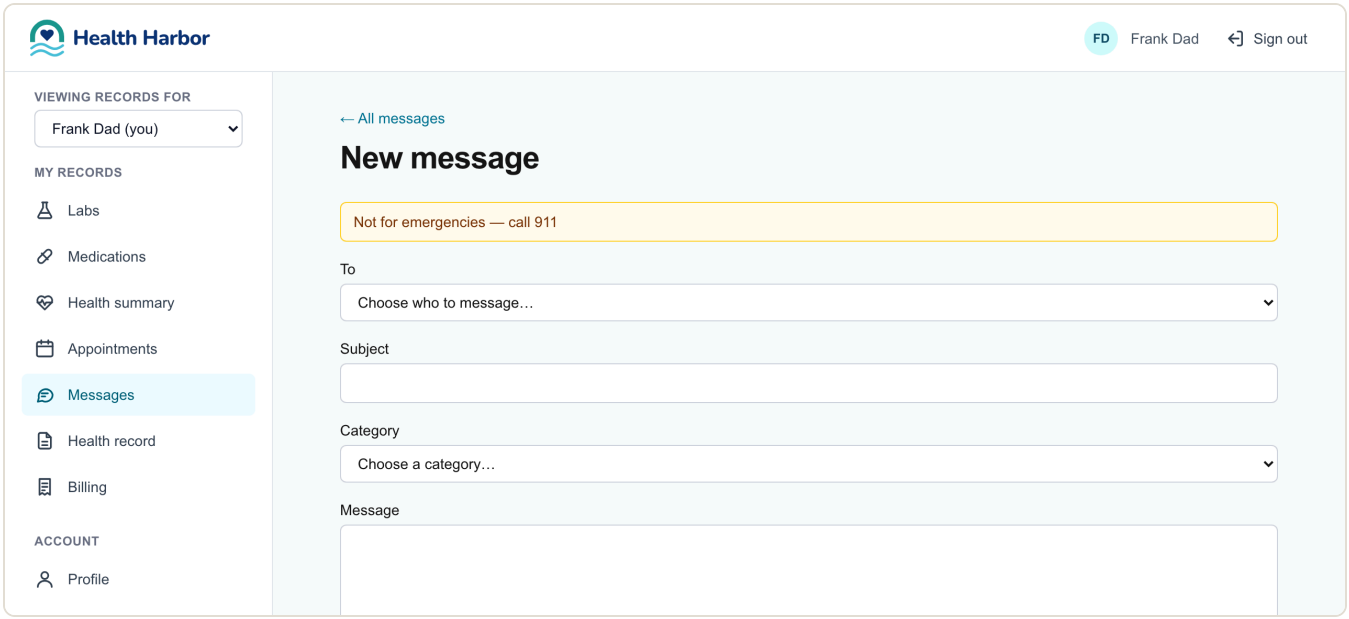
1. **Contact details.** Confirm your phone, email and address, or correct them.
2. **Insurance.** Confirm the card on file, update it, or add a photo of a new card.
3. **Questions.** Answer the visit's questionnaire: how you're feeling, what you'd like to talk about, and so on.
4. **Consent forms.** Read and sign the clinic's forms, such as consent to treatment and the privacy notice. You only sign each version once.
5. Choose **Finish check-in**. You're back on Home, all set.

> **You still arrive at the desk.** Finishing online sends everything to the front desk to review before you come in. When you get to the clinic, tell the desk you're there; they'll mark you arrived without asking you to fill anything in again.

A caregiver can check in for the person they look after (section 12).

6. Messages

Secure messages with your care team and the clinic. Not for emergencies: call 911.



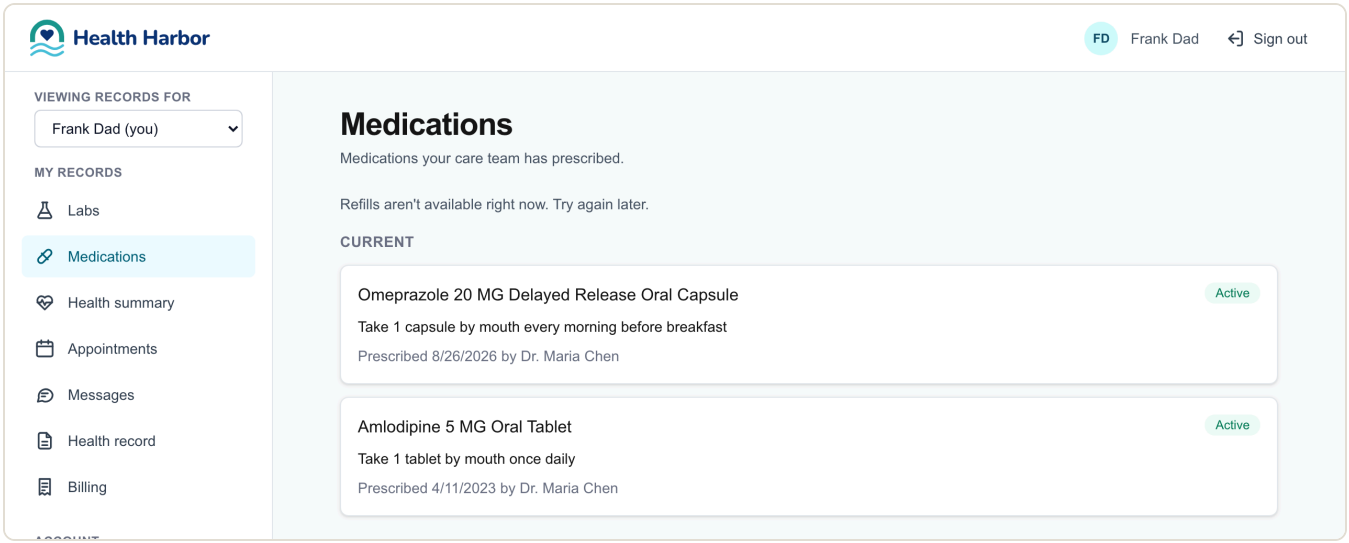
1. On Messages, choose **New message**.
2. In **To**, pick your clinician, or one of the clinic's inboxes: *Billing*, *Scheduling*, *Prescription refills* or *Medical records*.
3. Add a **Subject**, a **Category** (question, symptom, follow-up or other) and your message. You can attach up to 3 photos or PDFs, 10 MB each.
4. Choose **Send**. Replies show in the same thread.

Inbox lists your threads, newest first. **Archive** a finished conversation to move it to **Archived**; if a new message arrives in it, it comes back to your inbox.

> **Who answers?** Messages to your clinician go to their care team, so a nurse may reply for them. Questions about bills, appointments or records get a faster answer from the clinic inbox for that topic.

7. Medications and refills

Every prescription your care team has written, and refills without a phone call.



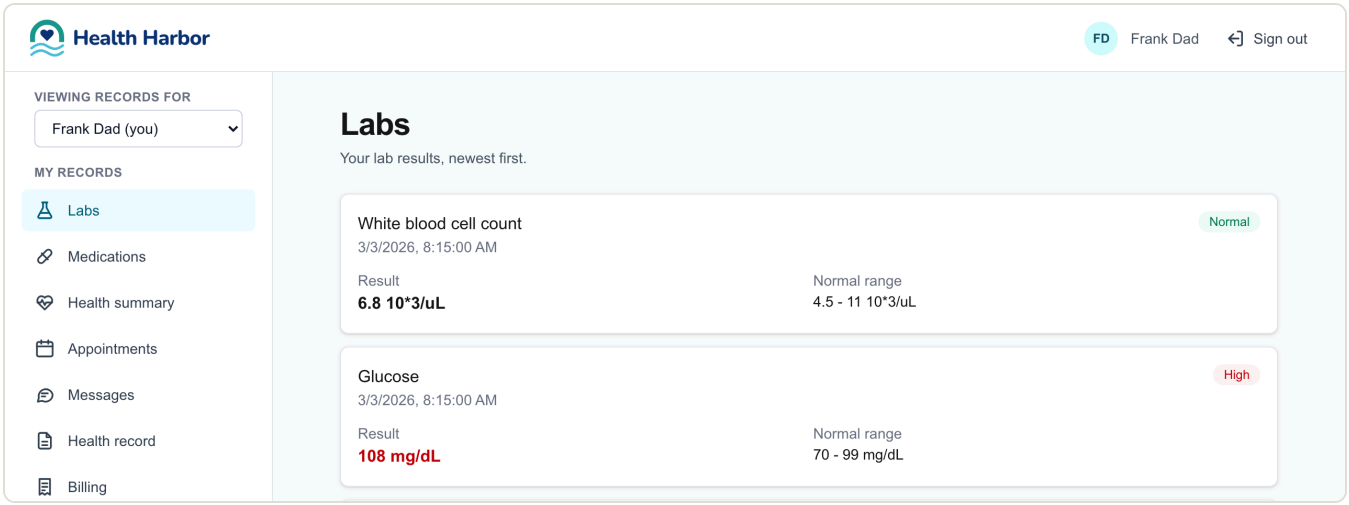
- *Current* medications show the dose, how to take it, and who prescribed it when. *Past* lists ones that were stopped.
- **Request refill** on a current medication asks for a refill. When a prescription has no refills left, ask for a renewal instead. Choose the pharmacy to send it to, or *Clinic pickup*, and add a note if you like.
- The medication then shows where the request is: *Requested*, *Approved*, *Ready for pickup at …*, or *Denied* with the reason. You get an email as it changes.

> **Too soon?** A refill can be requested once most of the last fill has been used (usually three quarters). Before then you'll see *It's too early to refill this prescription.* Only one request can be open for a prescription at a time.

Refill requests go to the clinic's pharmacists, who approve them or check with your clinician first.

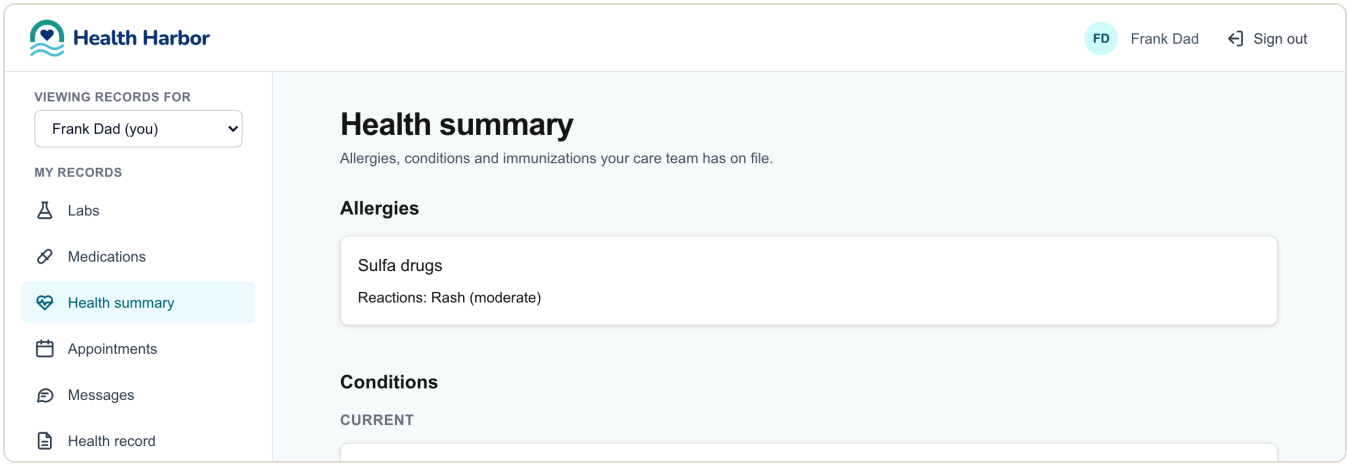
8. Labs and your health summary

Your results and the conditions, allergies and immunizations your care team has on file.



Labs

Results are listed newest first. Each shows the value, the normal range, and whether it's *Normal*, *High* or *Low*. A result outside the range isn't always a worry; your clinician reviews your results. To ask about one, send a message.

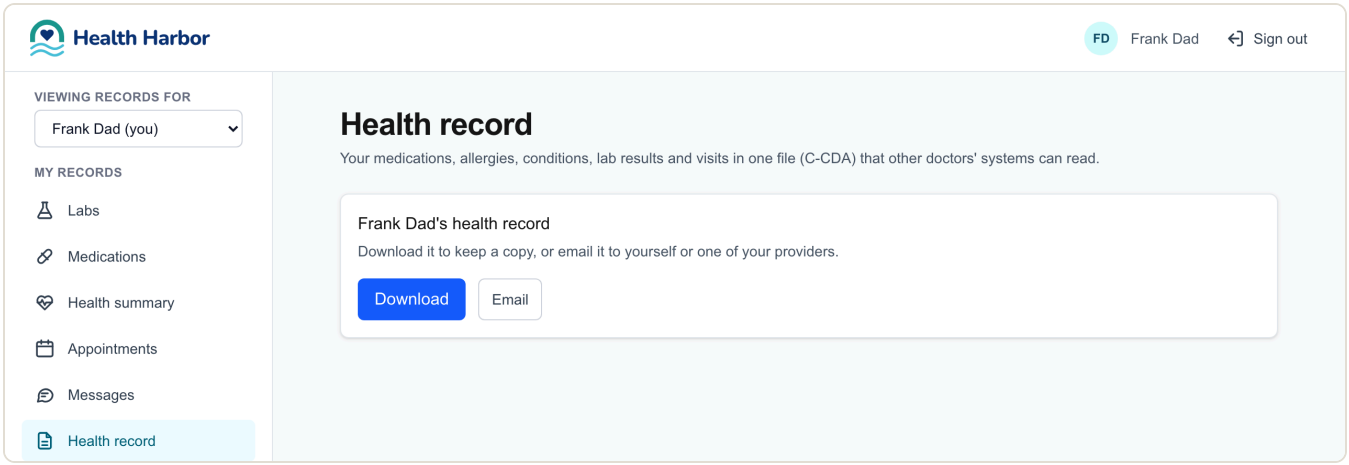


Health summary

Allergies with their reactions, current and past *Conditions*, and *Immunizations* with where and when they were given. If something is missing or wrong, tell your clinician so they can update your chart.

9. Your health record

Your whole record in one file that other doctors' systems can read.



The file holds your medications, allergies, conditions, lab results and visits, in the C-CDA format most health systems accept.

- **Download** saves a copy to your device.
- **Email** sends it to you, or straight to another provider: enter their email address.

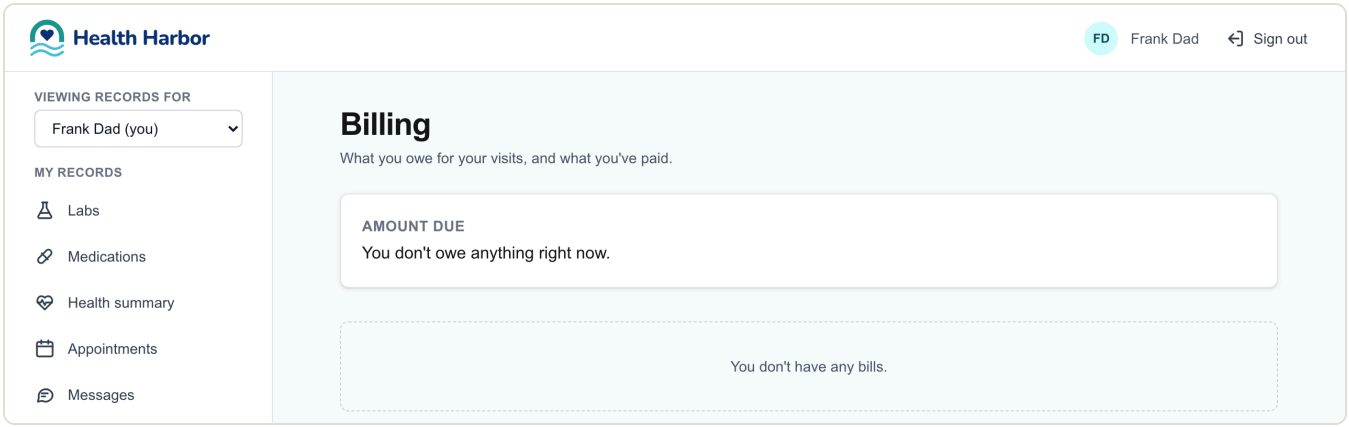
Each download and email is listed on your Activity page.

Visit notes

Notes your clinician shares after a visit are on Appointments: choose **Show Notes** on the visit.

10. Billing and paying

What you owe for each visit, and what you've paid.



- *Amount due* at the top is the total of your open bills.
- Each bill is for one visit. It lists the charges, what insurance covered, and what's left for you, with its due date. Bills past due are marked *Overdue*.
- Open a bill to download its statement as a PDF.

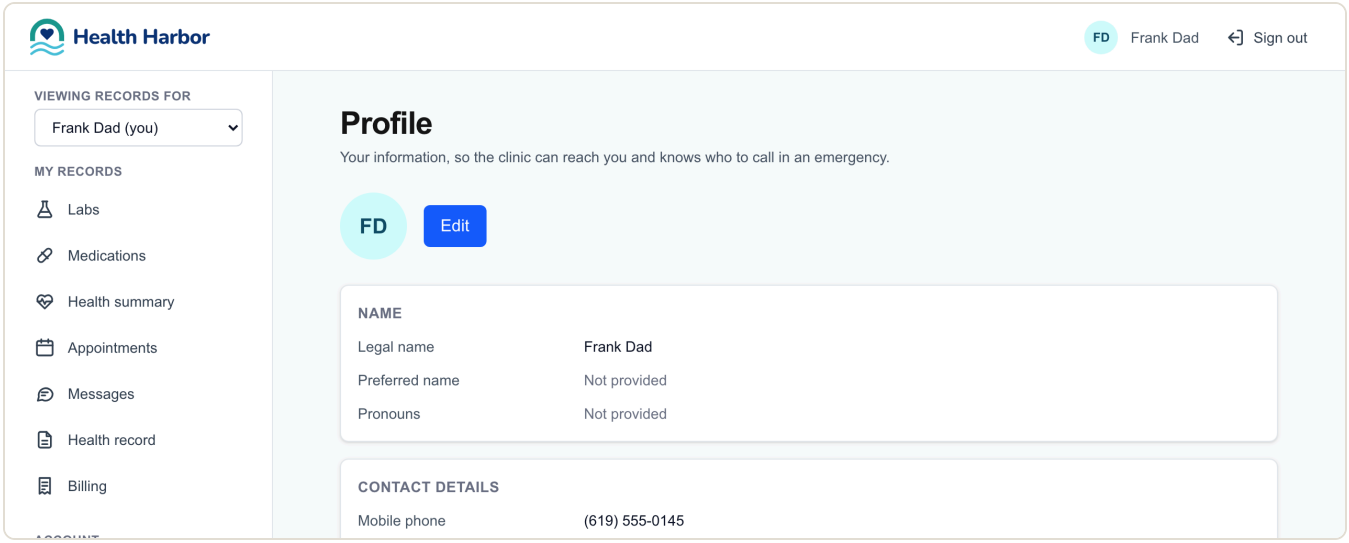
Paying

1. Choose **Pay** on a bill. Pay the full balance, or any amount from $1.00 up to it.
2. You're taken to a secure card payment page, then back to Billing. Your card details never touch the portal.
3. The payment shows on the bill, and you get an emailed receipt.

You also get an email when you have a new bill. Questions about a bill? Message the clinic's Billing inbox.

11. Profile and insurance

So the clinic can reach you, knows who to call in an emergency, and has your insurance before you arrive.



Profile

Choose **Edit** to change your preferred name and pronouns, phone, contact email and mailing address, gender identity, preferred language and emergency contacts. Changing the contact email doesn't change the email you sign in with.

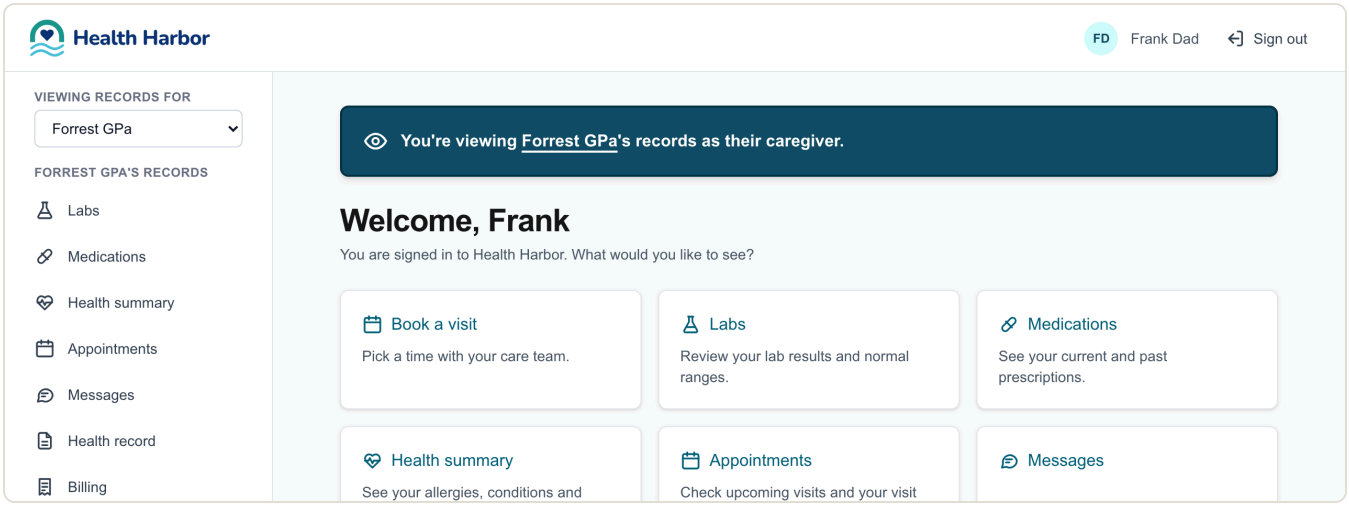
Insurance

- **Add a card**: enter the insurance company and member ID, and add photos of the front and back of the card.
- Your primary card is listed first. Update a card when it changes, and remove one that has ended.

The front desk sees your changes right away, and checks them when you check in.

12. Caring for family members

Parents, adult children and caregivers can look after someone else's care from their own login.



Switching between people

If you look after others, **Viewing records for** at the top of the menu lists them. Choose a name and every page shows that person's records, with a banner saying *You're viewing … records as their caregiver*. Choose your own name to switch back.

What a caregiver can do

Book, check in, reschedule and cancel visits, message the care team, ask for refills, see labs and the health summary, download the health record and pay bills, all for the person they look after. Messages and requests show who sent them. A caregiver who isn't a patient themselves sees only the people they look after.

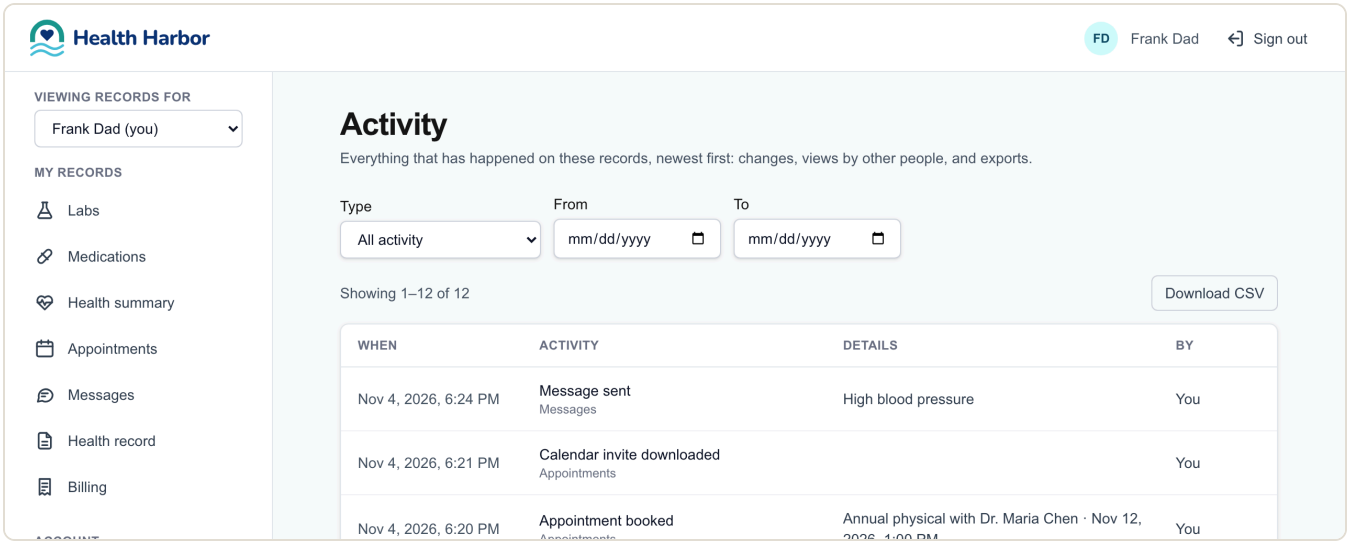
Giving someone access

1. On **Sharing**, enter their name and email, and how they're related to you.
2. Choose **Give access**. If they don't have a login yet, they're emailed an invitation.

They can see and update your records until you remove their access on the same page.

13. Activity and security

See everything that's happened on your records, and protect your sign-in.



Activity

A list of every change, view by someone else and export on these records, newest first, with who did it. Filter by **Type** (appointments, messages, refills, billing, insurance, profile, sharing, health record or record views) and by date, and **Download CSV** to keep a copy.



Two-step verification

Turn it on under **Security**, and after your password you'll enter a 6-digit code. Use either or both:

- **Authenticator app**: scan the QR code with an app such as Google Authenticator, Microsoft Authenticator or 1Password, then enter the code it shows.
- **Email codes**: get a code by email when you sign in. It's a good backup if you lose your phone.

These settings apply to your own sign-in only, even while you're viewing someone else's records.

14. What happens at the clinic

The portal, the front desk and your care team work on one record, so what you send lands with the right person.

WHEN YOU...	AT THE CLINIC
Book a visit	It's on your clinician's schedule straight away, and the front desk sees it on their day board.
Check in online	The front desk reviews what you sent, with anything you changed called out, before you arrive. Your answers are in your chart when your clinician sees you.
Ask to reschedule	If you picked a new time, the visit moves. If you sent a request, it waits in the front desk's queue with the times you prefer, and they book the new time.
Message your clinician	It goes to your clinician and their care team. Billing, scheduling and records messages go to the clinic's inboxes for those topics.
Ask for a refill	The clinic's pharmacists approve it, or check with your clinician first. You're emailed either way.
Update your profile or insurance	The front desk sees it right away.
Have labs drawn	Your results go to the clinician who ordered them to review.
Finish a visit	Your clinician signs the visit note; notes they share show under **Show Notes**.

Getting help

For a question about the portal, your records, a bill or an appointment, send a message to the clinic inbox for that topic. For anything urgent, call your clinic. In an emergency, call 911.