Care Cloud Software

Patient Guide

Using your Care Cloud patient portal

User Guide · v2.5.1

Contents

1. Getting Started

Accessing your portal

Care Cloud Software runs in your web browser — no installation required. Open your practice's portal at:

https://yourclinic.carecloudsoftware.com

> **Note:** Replace "yourclinic" with your practice's subdomain. Each practice has its own private, isolated portal and database.

Signing in for the first time

When your account is created you receive a welcome email containing your email address and a temporary password.

1. Open the portal link in the welcome email (or type your portal address into the browser).
2. Enter your email address and the temporary password from the email.
3. You will be prompted to choose a new password. Set a strong password and confirm it.
4. You are now signed in to your patient dashboard.

> **Note:** Passwords must be at least 8 characters and include an uppercase letter, a lowercase letter, and a number.

If you forget your password

1. On the sign-in page, click "Forgot password?"
2. Enter the email address on your account and submit.
3. Check your inbox (and spam folder) for a reset link. The link expires in one hour.
4. Open the link and set a new password.

Signing out

Use the "Sign out" option in the navigation menu whenever you step away, especially on shared computers. Your session protects patient health information (PHI).

Keeping data secure

- Never share your password. Care Cloud staff will never ask for it.
- Sign out on shared or public devices.
- Report anything unexpected to your practice administrator.

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2. Your Patient Portal

Your portal is a secure place to manage your care online — appointments, records, messages, prescriptions, bills, documents, and consent forms. Here's what each menu item does.

Menu item	What it’s for
Dashboard	A summary of your upcoming care and recent activity.
Intake Form	Complete your health history and details before a visit.
Appointments	Book, view, and manage your appointments.
Medical Records	View your visit notes, diagnoses, and results.
Messages	Message your care team securely.
Prescriptions	See your medications and request refills.
Billing	View and pay your invoices online.
Documents	Upload and download health documents.
Consent Forms	Review and sign required forms.
Download My Data	Get a complete copy of your record.

3. Completing Your Intake Form

1. Open Intake Form from the menu.
2. Fill in your health history, medications, allergies, and any requested details.
3. Save/submit. Your care team will see it before your visit.

4. Appointments

- **Book** Request or schedule a visit with your provider.
- **View** See upcoming and past appointments with date, time, and provider.
- **Reminders** You may receive email reminders before your appointment.

5. Medical Records

Medical Records shows the notes and results your care team has shared with you. If something looks unclear, use Messages to ask your provider.

6. Messages

1. Open Messages and select your care team or start a new message.
2. Type your question and send.

> **Note:** Messaging is not for emergencies. For urgent medical issues, call your provider’s office or 911.

7. Prescriptions & Refills

1. Open Prescriptions to see your current medications.
2. To request a refill, choose the medication and select “Request refill.”
3. Your provider reviews and approves refills; you’ll see the updated status.

8. Billing & Payments

- View your invoices and what each charge is for.
- When online payment is enabled, pay securely by card with the Pay button.
- See your payment history and outstanding balance.

9. Documents

1. Open Documents.
2. To upload: choose a file (PDF, image, or document) and confirm. Your files are private to you.
3. To download: click a document to save it to your device.

10. Consent Forms

Consent Forms lists the privacy and treatment forms you need to review and sign.

1. Open Consent Forms. Forms awaiting your signature are highlighted.
2. Click “Review & Sign,” read the form, and check the agreement box.
3. Type your full name (and optionally draw your signature), then submit.

11. Download My Data

You have the right to a copy of your health record. Download My Data assembles everything — demographics, appointments, prescriptions, records, invoices, consents, and a list of your documents.

1. Open Download My Data.
2. Choose “Download PDF” for a readable document, or “Download JSON” for a machine-readable copy.

> **Note:** Your download contains sensitive health information. Store it somewhere safe and only share it with people you trust.

12. Managing Your Account

- Change your password anytime from your account/profile settings.
- Keep your email address current so you receive reminders and reset links.
- Sign out when using a shared device.

Need help? Contact your provider’s office for assistance with your care or account.