Care Cloud Software

Provider (Doctor) Guide

Delivering care on Care Cloud Software

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 Provider 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 Role as a Provider

As a provider (doctor) you manage your schedule, care for the patients you treat, exchange secure messages, prescribe medications, and maintain your professional profile.

Area	What you do there
Dashboard	Your day at a glance — upcoming appointments and tasks.
My Schedule	View and manage your appointments.
Patients	Access the patients you treat and their records.
Messages	Communicate securely with patients.
Prescriptions	Issue prescriptions and approve refill requests.
My Profile	Update your specialty, contact details, and signature.

Note: You can only access patients you have a treatment relationship with (an appointment). This protects patient privacy and limits access to those in your care.

3. My Schedule

My Schedule shows your appointments. Use it to prepare for the day and keep track of visits.

- Review upcoming appointments with visit type and patient.
- See past visits and their status (Scheduled, Completed, Cancelled).

4. Patients

Finding a patient

Open Patients to search and select from the patients you treat. Selecting a patient opens their chart.

Registering a new patient

1. In Patients, click “+ Add Patient.”
2. Enter the patient’s details. Email is required.
3. Click Add. A welcome email with a temporary first-time password is sent, and the password is shown to you on screen to share if needed.

Working in the patient chart

- **Medical records** Review and add visit notes, diagnoses, and results.
- **Documents** View documents for patients you treat.
- **Prescriptions** See current medications and issue new ones.

5. Messages

Messages provides secure, HIPAA-conscious communication with your patients — a better channel than email or phone tag for clinical questions.

1. Open Messages and select a patient conversation (or start a new one).
2. Type your message and send. The patient sees it in their portal.

> **Note:** Do not use messaging for emergencies. Advise patients that urgent issues require a call to your office or 911.

6. Prescriptions

Issuing a prescription

1. Open the patient’s chart or the Prescriptions area.
2. Create a new prescription: medication, dosage, frequency, start/end dates, and refills.
3. Save. The patient can view it in their portal, and you may notify them by email.

Approving refill requests

1. Patients can request refills from their portal; requests appear in Prescriptions.
2. Review the request and approve or decline it.

7. My Profile

Keep your profile current — specialty, license number, and contact details. You can also capture your signature, which is used on prescriptions and clinical documents.

Need help? Contact your practice administrator or email support@carecloudsoftware.com.