



Mobile  Health

**CLIENT PORTAL
USER GUIDE**

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GETTING STARTED

The Mobile Health Client Portal delivers exam results directly to you in real-time. It also offers appointment scheduling, user management, streamlines and organizes your record-keeping, and allows multiple users access to results, improving your speed-to-placement and speed-to-compliance.

With Client Portal, you'll spend less time managing employee and candidate screening, and more time on what matters most — being there for your team and your customers.

LOGGING IN

First Login

1. Open your internet browser (i.e. Chrome, Firefox, Edge, etc.) and go to clients.mobilehealth.com.
2. Click **Forgot Password**.
3. Find the email with the link to reset your password. Check your Spam folder too.
4. Click the link and follow the next steps.
5. Once you have reset your password, close that browser tab.
6. Go to clients.mobilehealth.com again. Under "Local Login" enter your email and new password.

Subsequent Logins



WATCH VIDEO

[How to Login to Client Portal](#)

1. Open your internet browser (i.e. Chrome, Firefox, Edge, etc.) and go to clients.mobilehealth.com.
2. Enter your email address and password under "Local Login."

WELCOME PAGE

After logging in to Client Portal, you'll automatically be taken to the Welcome Page, which gives you an "at a glance" view of alerts and updates.

- Alerts: day-to-day notifications
- Updates: general notifications

Navigating Client Portal



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[How to Navigate Client Portal](#)

Main Menu

The menu is the list of pages in dark blue on the left side of your screen. Simply click on a page to go to it.

To collapse (hide) the menu, click the white arrow in dark blue at the bottom. To expand the menu, click the arrow again.

User Options

Click the "👤" (person icon) in the top right corner to view settings and adjust your communication preferences, change your password, and logout.

Settings

From "Settings" (User Options > Settings) users may edit their notification preferences.

The four types of notifications (also referred to as communications) are:

- Procedure Coded
- Procedure Re-Coded
- Order Coded
- Order Re-Coded

Frequency options:


- Never
- Immediately
- Hourly
- Daily
- Weekly

The color-coding means:

- Red = Failed/Does not meet standard
- Yellow = Cleared but may need follow up
- Green = Passed/Meets Standard
- White = Not Performed

Choose the preferred frequency and note the color coding. Notifications will appear in your Inbox or in the Notifications page of Client Portal. More details on notification options are below.

Notification Options

Click the “” (bell icon) in the top right to view your notifications. The most recent notification will be on top. See “Settings” section above for the four notification types.

Use the search box to find notifications by first or last name, procedure type (i.e. physical, drug test, etc.), or order number.

Click **Filter** to view notifications by Type (see types in “Settings” section above) or Status (all or unread).

You can delete notifications or mark them as read or unread. Use the “Select All” checkbox to take the same action on all notifications.

SCHEDULING & DEMOGRAPHICS

PAGE

Created with ease in mind to streamline your day-to-day, Scheduling and Demographics is where you add and manage people and appointments.

Search Locations (Schedule by Location)



WATCH VIDEO

[How to Schedule Appointments by Location](#)

Use this feature to find Mobile Health clinics near your candidates and employees, and schedule them at a specific location.

To search and schedule by location:

1. From the Main Menu, click on the “Scheduling and Demographics” page.
2. Click **Search Locations**.
3. Select a client from the drop-down menu.
4. Click **Select** to the right of “Package.” Choose the package and click **Save**.
Note: Only 1 package can be selected per order.
 - To exclude procedures within a package, remove the check box from the “Include” column.
 - To include any optional add-on procedures, check the box under the “Include” column.
 - Check the box under Client Pay column to cover the cost.
5. To add any additional procedures, click the **Select** button in the “Procedures” section. After selecting all of the procedures, click the “Client Pay” check box if you are covering the cost.
6. Click the **Select** button in the “Time & Location” section.
 - a. Enter desired date and time ranges.
 - b. Enter the zip code.
 - c. Select the desired mileage range.
 - d. The default view for appointment availability is by location. Select the Date bubble to view availability by date instead.
Note: If no locations appear, adjust the date range, time range, zip code, and/or mileage range.
7. See all times available by clicking the arrow to the left of the date or location. Select a time and click **Save**.
Note: Some locations require patient pay at the time of booking, which will be indicated in red text. In these instances, appointments CANNOT be made without payment, so be sure to have the patient’s payment information ready.

8. Click **Select** to the right of Person to find the individual you're scheduling the appointment for. Click **Save**.
*Note: You may also add a new person by clicking **Add New Person** and completing the required fields.*
9. Enter any invoice memos.
10. Click **Pay Now** to submit patient prepayment (if required) and/or client payment information (if desired).
 - a. Add payment info.
 - b. Click **Submit and Confirm**.
 - c. You'll get a confirmation message in green.
11. View Appointment Confirmation details and click **Done**.

Note: Appointment Confirmation Letters will be emailed to patients and can be viewed in Client Portal under the person's record. See "[View Exam Files](#)" for instructions.

Add New Person



WATCH VIDEO

[How to Add a New Person](#)

Use this feature to add a new candidate or employee so you can schedule an appointment for them.

1. From the Main Menu, click the "Scheduling and Demographics" page.
2. Click the **Add New Person** button.
3. Enter required information, which is marked with an asterisk.
Note: Client admins can modify what information is required during implementation.
4. Click **Save**. A green "Save Successful" confirmation message will appear.

After adding a person, click **Schedule** in the top right to make an appointment for that person, or view their **Medical History**.

Search by Person



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[How to Search by Person](#)

Confirm candidate or employee is already in your Client Portal by searching for them.

1. From the Main Menu, click the “Scheduling and Demographics” page.
2. You can search by first name, last name, DOB, zip code, external ID, mobile phone number, or email address by typing in the respective text box.
*Note: Click the blue **Advanced** button to select a client to search by, and add additional search information, such as SSN.*
3. Find the person you were looking for in the list of results.
Note: Click on the headers to sort them by ascending or descending order.
4. To schedule an appointment, view their medical history, review their profile, or delete them, click “ ... ” (three dots) under the Action column.

Export Data



WATCH VIDEO

[How to Export Data](#)

From “Search by Person” on the “Scheduling & Demographics” page, you can export data of people in your Client Portal.

1. Search by person and apply any filters you’d like.
2. Check the small white box to the left of the name of any record you wish to include in your export. The selected records will appear in the top section. To view your selections, click **Selection #**. The number that appears indicates the number of records you have chosen.
3. To continue to add people, search by desired fields and check the box to the left of their name. Each subsequent search will appear below your prior selections. Search and add as many people as desired.
4. To remove an individual from your selected list, click the red x under the “Action” column to the right of their name.
*Note: To remove ALL selected people click **Clear Selection** to the right of the **Selection #** button.*
5. When all profiles you want have been selected, scroll down and click the **Export** button.

The system will generate and download a file based on the data fields you select.

Import Data



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[How to Import Data](#)

To add more than one person at once, use the **Import Data** button at the bottom of the “Scheduling and Demographics” page.

1. Click the **Import** button at the bottom of the page.
2. In the pop-up window, choose a client from the drop-down menu, and click the **Download a Template** button.
3. Find and open the file from your downloads.
4. Fill in the required fields for all people whom you wish to add to the portal.
5. Save the file to a location of your choice.
6. Click **Import** again from the bottom of the “Scheduling and Demographics” page.
7. Click **Select File**.
8. Find the file you just saved and click **Open**.
9. Click **Import**. Now all those people have been added to your portal.

Create New Appointment

For your convenience, there are multiple ways you can schedule an appointment in Client Portal.

Schedule Appointment by Location

To schedule by location, see [Search Locations](#) above.

Schedule Appointment by Person



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[How to Schedule Appointment by Person](#)

1. If scheduling an appointment for a new person, you need to add them first. Follow the steps above for “[Add a New Person](#)” then proceed to step 2 below.

If scheduling an appointment for an existing person, use the search to find them.

2. Click to “ **...** ” (three dots) to the right of their name.
3. Click **Schedule Appointment**.
4. Click **Select** to the right of “Package.” Choose the package and click **Save**.
Note: Only 1 package can be selected per appointment.
 - To exclude procedures within a package, remove the check box from the “Include” column.
 - To include any optional add-on procedures, check the box under the “Include” column.
 - Check the box under Client Pay column to cover the cost.
5. To add any additional procedures, click the **Select** button in the “Procedures” section. After selecting all the procedures, click the “Client Pay” check box if you are covering the cost.
6. Click the **Select** button in the “Time & Location” section.
 - a. Enter desired mileage range.
 - b. Enter desired date and time ranges.
 - c. Enter zip code if not pre-populated, or change it if necessary.
 - d. The default view for appointment availability is by location. Select the Date bubble to view availability by date instead.
Note: If no locations appear, adjust the date range, time range, zip code, and/or mileage range.
7. See all times available by clicking the arrow to the left of the location or date. Select a time and click **Save**.
Note: Some locations require patient pay at the time of booking, which will be indicated in red text. In these instances, appointments CANNOT be made without payment, so be sure to have the patient's payment information ready.
8. Enter any invoice memos.
9. Click **Pay Now** to submit patient prepayment (if required) and/or client payment information (if desired).
 - a. Add payment info.
 - b. Click **Submit and Confirm**.
10. Click **Confirm Appointment**. A confirmation message will appear in green.
11. Click **Done**.

Note: Appointment Confirmation Letters will be emailed to patients and can be viewed in Client Portal under the person's record. See [“View Exam Files”](#) for instructions.

View Person Profile

Person Profile contains the demographic information of a person. You can make changes or add additional data that may be useful.

From Person Profile, you can also schedule a new appointment or view medical history.

1. Go to the Scheduling and Demographics page from the Main Menu on the left.
2. Search for a person by typing their name in the appropriate search boxes.
3. Click “...” (three dots) under the “Action” column to the right of their name.
4. Click **Person Profile**.
5. Update their information or click **Schedule** or **View Medical History** in the top right.

View Medical History



WATCH VIDEO

[How to View Medical History](#)

Medical History will contain all orders within the selected date range. From Medical History, you can view results and exam files.

1. Go to the Scheduling and Demographics page.
2. Search for person by typing their name in the appropriate search boxes.
3. Click “...” (three dots) under the “Action” column to the right of their name.
4. Click **Medical History**.

Within Medical History, you can search by order number, adjust the date range, or apply filters to show order result or status of an exam. You may also view exam files, create a new appointment, and cancel or reschedule an exam by clicking “...” (three dots) under the “Action” column.

Cancel an Exam



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[How to Cancel an Exam](#)

To cancel a previously confirmed order:

1. Search for the person's profile from the Scheduling and Demographics page.
2. Click Medical History from "..." (three dots) to the right of their name to view all previous and future appointments.
3. Click the down arrow to the left of the order number.
4. Click "..." (three dots) to the right of the order number.
5. Choose **Cancel Exam**.
6. Confirm cancellation by clicking **Yes** in the popup window. No further action is needed.

Note: If an order had a patient pay responsibility, they will be refunded within 5-10 business days and charged for the new appointment at time of scheduling.

Reschedule an Exam



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[How to Reschedule an Exam](#)

To reschedule a previously confirmed exam:

1. Search for the person's profile from the Scheduling and Demographics page.
2. Click Medical History from "..." (three dots) to the right of their name to view all appointments.
3. Click "..." (three dots) to the right of the order number and choose **Reschedule Exam**.
4. Click **Yes** in the popup window.
5. Make any necessary edits to the package and/or procedures.
6. Click **Select** in the "Time & Location" section.
 - a. Enter desired date and time ranges.
 - b. Enter zip code if not pre-populated, or change it if necessary.
 - c. Select the desired mileage range.
 - d. The default view for appointment availability is by location. Select the Date bubble to view availability by date instead.

Note: If no locations appear, adjust the date range, time range, zip code, and/or mileage range.

7. See all times available by clicking the arrow to the left of the location or date. Select a time and click **Save**.

Note: Some locations require patient pay at the time of booking, which will be indicated in red text. In these instances, appointments CANNOT be made without payment, so be sure to have the patient's payment information ready.
8. Enter any invoice memos.

9. Click **Pay Now** to submit patient prepayment and/or client payment information (if desired).
 - a. Add payment info.
 - b. Click **Submit and Confirm**.
10. Click **Confirm Appointment**. A confirmation message will appear in green.
11. Click **Done**.

Notes:

Rescheduling an existing order will cancel the original order and generate a new order and order number.

If an order had a patient pay responsibility, they will be refunded within 5-10 business days and charged for the new appointment at time of scheduling.

Delete Person



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[How to Delete a Person](#)

If at any time you would like to delete a person, you may do so through the Scheduling and Demographics page.

1. Go to the Scheduling and Demographics page.
2. Search for a person by typing their name in the appropriate search boxes.
3. Click “**...**” (three dots) under the “Action” column to the right of their name.
4. Click **Delete Person**.
5. A popup window will appear, click **Yes** to confirm and delete the person.

This person will be deleted from your dashboard, but patient records will be retained within Mobile Health’s internal database.

If you need to reactivate a person’s account after deleting it, please reach out to our Client Success Team by emailing clientservices@mobilehealth.com.

DASHBOARD PAGE

The Dashboard page is where you view and manage orders, and see results, giving you the detailed information you need to manage hiring and compliance with confidence.

Order Dashboard



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[How to Use the Dashboard](#)

To view all orders, click “Dashboard” from the Main Menu.

1. If you are an administrator for multiple agencies, use the dropdown in the top right to choose the applicable organization.
2. Search by person’s first or last name, order number, or location.
3. Adjust the date range to your desired window of time.

*Note: Apply additional filters to view data by clicking **Filter** and selecting your options:*

- *Order Result*
 - *Status*
4. Click the down arrow on any order to see procedure type, location, reference ID, and results.

You can also click any column header (i.e. Client, First Name, Last Name, etc.) in the Order Dashboard to sort by ascending or descending order.

Order Statuses

- Complete: order is medically coded
- In Progress: exam is underway
- Scheduled: upcoming order
- Cancelled: order is cancelled
- Closed: disregard
- Active: upcoming appointment for the same day
- Pending Review: exam was performed, awaiting medical code
- Partially Reviewed: some procedures within an order were coded
- Past Scheduled: patient did not show up for their appointment
- Completed Invoiced: order was completed and invoiced
- Canceling: processing a cancellation

Medical Coding

Orders will be coded per procedure with the following colors:

- Red = Failed/Does not meet standard

- Yellow = Cleared, but may need follow up
- Green = Passed/Meets Standard
- White = Not Performed

Once all procedures within an order have been coded, the order will be coded, and an icon will appear on the left of the order in the dashboard.

View Exam Files



WATCH VIDEO

[How to View Exam Files](#)

View Exam Files allows you to see any files associated with an exam, such as order confirmation letters, medical reports, and more.

1. Click “Dashboard” in the Main Menu.
2. Find the order you want to view the exam files for.
3. Click “ ... ” (three dots) to the right of the order under the “Action” column.
4. Select **Exam Files**.
5. Click the file you want. It will open in a new tab.
6. When done viewing all desired files, click **Close** on the popup to return the Order Dashboard.

Create New Appointment



WATCH VIDEO

[How to Create a New Appointment from the Dashboard](#)

1. Click “Dashboard” in the Main Menu.
2. Use the search field to search by a person’s first or last name, order number, or location, and adjust the date range to the desired window of time.
3. Click “ ... ” (three dots) to the right of the order under the Action column.
4. Select **Create New Appointment**.
5. Follow directions from [Create New Appointment](#) above.

Cancel an Exam



WATCH VIDEO

[How to Cancel an Exam from the Dashboard](#)

1. Click “Dashboard” in the Main Menu.
2. Find the order on the dashboard with Scheduled or Past Scheduled order status.
3. Click “...” (three dots) to the right of the order under the Action column.
4. Select **Cancel Exam**.
5. Click **Yes** on the pop-up.

Note: If an order had a patient pay responsibility, they will be refunded within 5-10 business days.

Reschedule an Exam



WATCH VIDEO

[Reschedule an Exam from the Dashboard](#)

1. Click “Dashboard” in the Main Menu.
2. Find the order on dashboard with Scheduled or Past Scheduled order status.
3. Click “...” (three dots) to the right of the order under the Action column.
4. Select **Reschedule Exam**.
12. Choose **Reschedule Exam**.
13. Click **Yes** in the popup window.
14. Make any necessary edits to the package and/or procedures.
15. Click **Select** in the “Time & Location” section.

- a. Enter desired date and time ranges.
- b. Enter zip code if not pre-populated, or change it if necessary.
- c. Select the desired mileage range.
- d. The default view for appointment availability is by location. Select the Date bubble to view availability by date instead.

Note: If no locations appear, adjust the date range, time range, zip code, and/or mileage range.

16. See all times available by clicking the arrow to the left of the location or date. Select a time and click **Save**.

Note: Some locations require patient pay at the time of booking, which will be indicated in red text. In these instances, appointments CANNOT be made without payment, so be sure to have the patient's payment information ready.

17. Enter any invoice memos.
18. Click **Pay Now** to submit patient prepayment and/or client payment information (if desired).
 - a. Add payment info.
 - b. Click **Submit and Confirm**.
19. Click **Confirm Appointment**. A confirmation message will appear in green.
20. Click **Done**.

Notes:

- *Rescheduling an existing order will cancel the original order and generate a new order and order number.*
- *If an order had a patient pay responsibility, they will be refunded within 5-10 business days and charged for the new appointment at time of scheduling.*

View Medical History



WATCH VIDEO

[How to View Medical History from the Dashboard](#)

Here's how you can view a person's medical history from the Dashboard.

1. Click "Dashboard" in the Main Menu.
2. Use the search to find the person. You can search by first or last name, order number, or location and adjust the date range as needed.
3. Once you have found the person, click "..." (three dots) to the right of the order under the "Action" column.
4. Select **Medical History**. Within Medical History, you can search by order number, adjust the date range, or apply filters to show order result or status of an exam.
5. Click the down arrow to the left of each order number to see procedure details.
 - a. To view the coder's remarks, select "..." (three dots) to the right of a completed procedure under the "Action" column and click **Coder's Remarks**.
 - b. Pop-up window will appear with the remarks.

USER MANAGEMENT PAGE

User Management is just what it sounds like — it's where you manage users of your Client Portal.

User Roles and Types of Access



WATCH VIDEO

[How to Manage Users](#)

Client Portal access is granted according to user role and on a needs-only basis. The actions available by role are outlined below.

Note: This guide may include features you can't access or actions you can't take due to your user role.

User Role	Types of Access
Client Admin	Add patients, edit patient information, schedule orders, view results dashboard, view exam files, user management
Client Scheduling and Results	Add patients, edit patient information, schedule orders, view results dashboard, view exam files
Client Scheduling	Add patients, edit patient information, schedule orders, view results dashboard, view confirmation letter only

Add a User

1. Go to the "User Management" page from the main menu.
2. Click **Add New User** button.
Note: An email address is required for each user. A phone number is optional but highly recommended for contact purposes.
3. Select the client and type of role. See details above in "User Roles and Types of Access."

Edit a User

1. Go to the "User Management" page from the Main Menu.

2. Find users by typing their email address into the search box.
3. Click the “**...**” (three dots) to the right of their email address under the “Action” column.
4. Click **Edit User** to add or update their phone number, or add, edit, or delete their role within Client Portal.

Note: Email addresses cannot be edited. If a user needs their email address updated, you will have to delete the current user and add a new user with the correct email address.

Reset Password

1. Go to the “User Management” page from the Main Menu.
2. Find users by typing their email address into the search box.
3. Click the “**...**” (three dots) to the right of their email address under the “Action” column.
4. Click **Reset Password**. The user will receive an email with a link to reset their password.

Delete User

Deleting a user will remove their access to Client Portal.

1. Go to the “User Management” page from the Main Menu.
2. Use the search box to find the user you want to delete.
3. Click the “**...**” (three dots) to the right of their email address under the “Action” column.
4. Click **Delete User**.