

## MyChart Activation Protocol

[Note: If patient is not reached or is reached only briefly during call but has to hang up, record contact attempt in **Contact Attempts Form**.

Follow call limit protocol as follows: CHW's to call patients a maximum of 6 times over a 2-week period as follows: 1) If voicemail is setup, CHWs will leave a message with their contact information after the first unanswered call, and will follow-up 2 more times if the call is not returned; 2) if voicemail is not setup, CHWs will call up to 5 more times over the 2-week period. If a patient answers the call and declines participation in the study, contact will be ended and the reason for decline recorded in the **Contact Attempts Form** and **Tracking Form**.]

\*If number is wrong or not in service, please check the "Do not call - wrong # / # not in service" on the MyChart activation form\*

### MYCHART ACTIVATION SCRIPT

*Good morning/afternoon, is this Mr./Mrs. \_\_\_\_?*

*[IF NO]*

*Is Mr./Mrs. \_\_\_\_ available?*

*[IF NO]*

*Is there a better time to reach them?*

*\*update/schedule follow-up call in contact attempts form*

*[IF YES]*

*My name is \_\_\_\_ and I work for NYU Langone Health. We are reaching out to NYU patients with upcoming appointments to help them set up a MyChart account. Are you familiar with MyChart? Have you used a patient portal before?*

*Based on our records, you do not have a MyChart set up. MyChart offers patients personalized and secure on-line access to portions of their medical records. It also enables you to securely use the Internet to help manage and receive information about your health. With MyChart, you can view your medications, test results, health summary and immunizations, as well as access other services such as requesting prescription renewals and communicating with your care team.*

*Would it be alright if I work with you now to set up your account? [yes/no/not interested]*

*[If "YES"] - Proceed with MyChart activation protocol, below*

*[If "NO"]- Is there a good time I can call you back so that we can set up your account?*

*Can you confirm your phone number and email address? [update in the provided box in REDCap if differs from what is listed] \*\*[If patient is not interested]: SKIP THIS QUESTION and move on to following question*

NYU employee schedules a follow-up call in **Contact Attempts Form**.

If “No/Not Interested” – *Could you please provide a reason why not?* (select drop-down menu item from REDCap question that most closely relates to patient’s answer. Update final outcome in **Tracking Form**)

### **MyChart Activation Protocol**

*Can you confirm your phone number and email address?* [update in the provided box in REDCap if differs from what is listed]

Confirm if patient has an active email account.

*Great! Do you have an active email address?* [Yes/No]

[If “NO”] *I’m happy to schedule an in-person appointment with you to help you set up a Yahoo or Gmail account OR I can send you resources to guide you through setting up the email account on your own. Unfortunately, due to privacy concerns, I cannot help you sign up for an email account over the phone.*

*Would you prefer to schedule an in-person appointment, or receive resources on how to sign up for an account independently?*

(Select Encounter 1 Outcome: “Email setup in process – GO TO EMAIL SIGNUP FORM”; save and exit **MyChart Activation Form**; go to **Email Signup Form** and complete as prompted. When complete, save and exit **Email Signup Form**; return to **MyChart Activation Form** and fill out “Email Signup Outcome” question. Follow REDCap instructions to complete MyChart Activation with patient. Fill out final outcome in **MyChart Activation Form**, where prompted, and in **Tracking Form**).

[IF PATIENT REFUSES TO SIGN UP FOR EMAIL]: *“May I ask why you are not interested?”* (select drop-down menu item from REDCap question that most closely relates to patient’s answer. Update final outcome in **Tracking Form**)

[If “YES”]

*Great! Are you currently by a computer, laptop, or a smartphone to follow a few simple steps? If so, please go to your browser and type <https://activation.nyulmc.org>. This is NYU’s site to set up your MyChart account. Please type in your first and last name followed by your date of birth as seen on the screen. Then press “CONTINUE”*

## Create Your MyChart Account

If you are a patient at NYU Langone, you can create an NYU Langone Health MyChart account to access your medical information. If you already have a MyChart account, [sign in](#).

### Find Your Patient Record

To create a MyChart account, we first need to confirm that you have a patient record at NYU Langone. Please enter the following information to help us find your record.

First Name

Last Name

Date of Birth (MM/DD/YYYY)

Continue

By submitting this form, I attest that I am the individual whose information is being submitted to create an NYU Langone Health MyChart account. I consent and authorize NYU Langone to contact me about my healthcare by email, text message, or phone call. I understand that standard message and data rates may apply and communication frequency varies. I understand that I can change my communications preferences or opt-out of communications at any time through my NYU Langone Health MyChart account, by talking to my doctor's office, or texting HELP or STOP to 69854. Read more about our MyChart [terms and conditions](#) and [privacy policy](#).

Guide patients to follow the additional security verification to create account. Once account is created, remind the patient to:

- Keep their login information (username and password) secured/written somewhere safe so that they can go back for it if forgotten
- Their account contains private health information and should be treated as such. Remind them to not share their login information with anyone
- They are able to download the MyChart app to their iPhone. Access to MyChart is available via the NYU Langone Health mobile application for their Apple® or Android™ device. They must have an existing NYU Langone Health MyChart username and password to use the application. They can download the NYU Langone Health app in the iOS App Store or on Google Play.

If patients have specific questions about the use of MyChart, please follow the MyChart FAQs at the link below:

<https://mychart.nyulmc.org/mychart/Authentication/Login?mode=stdfile&option=faq&iid=int%5Fmychart%5Fhelp%5Ffaq>

[IF PATIENT REQUIRES FOLLOW-UP]: Schedule follow-up calls as instructed in REDCap until MyChart Activation is complete.

Update Final Outcome in **Tracking Form** when all steps are complete (ensure all other forms are complete).

#### FOLLOW UP SCRIPT

[If you'd like to send a quick follow up text or email (based on patient's preference) feel free to use the blurb below]:

*Thank you so much for your interest in activating MyChart at NYU Langone. MyChart offers patients personalized and secure on-line access to portions of their medical records. Please go to <https://activation.nyulmc.org/> to get started on your activation set up. If you have any questions or would like assistance please reply to this email/text or give me a call at #####.*