

Navigate Dashboard

- a. **Top Menu:** Click to access the *Dashboard, Health Records, Documents, Messages, Payments, or Itemized Receipt*. Click on the *Patient Name* to access [My Account](#) or to log out.
- b. **Health Records:** Click **View Health Records** to review health information such as: eLab results, vitals, medications, problems, and allergies.
- c. **Documents:** Click **View Documents** to review shared documents such as treatment plans or patient education. A notification displays when a treatment plan signature is requested by the provider.
- d. **Messages:** Click **View Messages** to send and receive messages secure with the provider. A notification displays when a new message is received.
- e. **Payments:** If applicable, click to make an online payment, view the bill, or view previous portal payments.
Note: Practice must be [Stripe activated](#) for patients to access this section.
- f. **Itemized Charge Receipt:** If applicable, click to view and download itemized receipts for their visits.
Note: Practice must enable the [Receipt on Patient Portal setting](#), for patients to access this section.
- g. **About you:** Patient details on file with the practice.
- h. **About your practice:** The practice address and contact information.

The screenshot shows the Kareo Patient Portal Dashboard. At the top, there is a navigation menu with links for Dashboard, Health Records, Documents, Messages, Payments, Itemized Receipt, and Shirley Bishop. The main content area is divided into several sections:

- Health Records:** A blue header section with a sub-header "Health Records". Below it, a text box says "With Kareo Patient Portal, you can view your health information." and a button labeled "View Health Records" with a right-pointing arrow.
- Documents:** A blue header section with a sub-header "Documents". Below it, a text box says "View documents shared with you by your provider." and a notification "Signature needed on Treatment Plan" with a red exclamation mark icon. Below that is a button labeled "View Documents" with a right-pointing arrow.
- Messages:** A blue header section with a sub-header "Messages". Below it, a notification "New Message!" with a red exclamation mark icon. Below that is a text box: "Send and receive secure messages with your provider. We back Kareo Patient Portal with the latest and greatest security measures." and a button labeled "View Messages" with a right-pointing arrow.
- Payments:** A blue header section with a sub-header "Payments". Below it, a text box shows "\$775.00 Current Balance" and a button labeled "Make a Payment" with a right-pointing arrow.
- Itemized Charge Receipt:** A blue header section with a sub-header "Itemized Charge Receipt". Below it, a text box says "View and download the Itemized Charge Receipts of your practice visits." and a button labeled "View Receipts" with a right-pointing arrow.

On the right side of the dashboard, there are two sections:

- About you:** A section with a blue header. It contains patient information: Name: Shirley Bishop, Date of birth: 07/25/1991, and Contact: 68 Bluebird Lane, Irvine, CA 92612 (714) 111-2707.
- About your practice:** A section with a blue header. It contains practice information: Practice Name: A Place for Healing, Practice Contact: 3325 Michelson Dr, Irvine, 92612 (888) 775-2736.

At the bottom of the page, there is a footer with the text "©2021 Kareo, Inc. • Terms of Service • Privacy Policy".