

External - MyMedicalLocker - ToDo - Task - Patient Portal Role

Last Modified on 04/28/2026 10:46 pm EDT

External - MyMedicalLocker - ToDo - Task Patient Portal Role

(Enhanced 4/28/2026)

Practices now have options allowing more granular control over how their users access communications from My Medical Locker. Access to Patient Portal messaging is controlled by two roles.

- **Task - Patient Portal - List**

Grants access to the My Tasks > Patient Portal queue (task list)

- **Task - Patient Portal**

Grants access to open and respond to Patient Portal messages received via Communication where the forwarded Patient Portal message contains a My Medical Locker Message link that users click to read/respond to the portal message

For practices that have users already set up with access to My Task > Patient Portal, their user accounts should be automatically set to write for both of these roles to ensure they do not have disruption to accessing their Patient Portal Messages. For practices wishing to add limited users, this article explains how to do so.

All communications from MyMedicalLocker will display in this To Do list including secure communications, Patient Intake submissions, shared documents, and appointment requests.

This screen is accessible from the My Tasks section of the application.

Setup << Task Patient Portal Review Choice Training

My Tasks > Patient Portal Review

Communication (1)
Orders (0)
Results (3)
Superbill (2)
SOAP Notes (6)
eDocuments (0)
Prescription (4)
Reminder (0)
Patient Portal (10)
Fax (0)
Fax Updocx (0)
Case Mgmt. (2)
NYSED (0)

Pending Review 9
Reviewed (month) 1

Arranged By: Request

Document Share

Allscripts, Testy Two J. J. Mister (TESTY) Male Age: 34y DOB: 08/08/1986
Document Share 04/05/2021 2:48PM (CDT)

MISYS, FEMALE TEST F. Female Age: 58y DOB: 09/20/1962
Document Share 03/24/2021 11:03AM (CDT)

Intake Form

Head, Blake A. Male Age: 32y DOB: 03/20/1989
Intake Form 04/16/2020 9:57AM (CDT)
Intake Form 04/16/2020 9:20AM (CDT)

Kay, Carly A. (Car) Female Age: 40y DOB: 07/19/1980
Intake Form 04/15/2020 3:54PM (CDT)

Head, Blake A. Male Age: 32y DOB: 03/20/1989
Intake Form 04/15/2020 2:54PM (CDT)
Intake Form 04/13/2020 1:49PM (CDT)
Intake Form 04/10/2020 12:21PM (CDT)

Message

Unknown Age: DOB:
Message 05/19/2021 10:03AM (CDT) Davis PT,

Field Name Current Value New Value
EMR Changes Exist. Please go to the EMR to merge these changes.
All information is up to date

9 Items 1 of 1

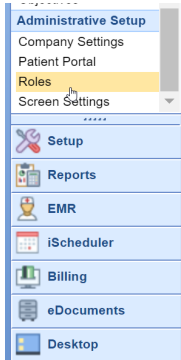
Current User: Heinlein, MD, Alex Last Logon: 05/18/2021 1:13PM (CDT) with no unsuccessful logon attempts Session: 1:59:45 Distributed By: iSalus Healthcare

Setup the Task Patient Portal Role

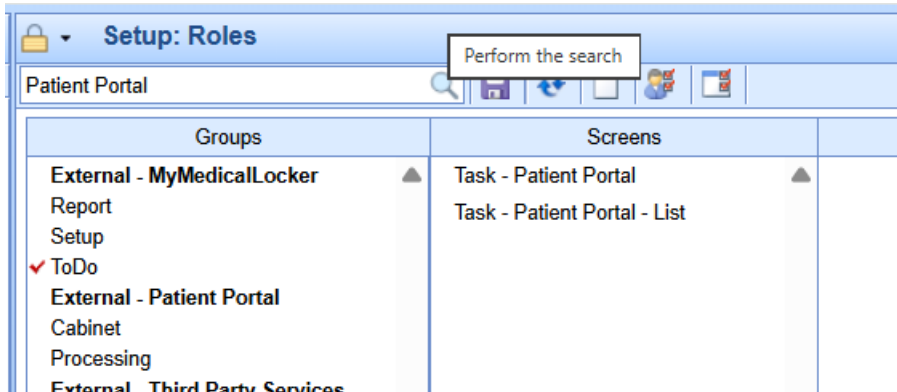
1. Click on the **Setup** portal.



2. Select **Roles** under Administrative Setup.



3. Type in **Patient Portal** into the search box and hit the **Magnifying Glass** button and you should notice that the roles **Task - Patient Portal** and **Task - Patient Portal - List** are accessible:

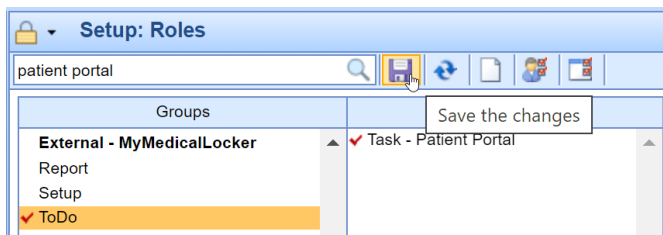


4. Practice users with role setup permissions can control access to Patient Portal messages. **Full Access** allows users to view the Patient Portal queue and respond to messages directly. **Limited Access** prevents users from opening the queue; they will see "Patient Portal" in My Tasks but will receive a security message if they attempt to access it. These users can still respond to messages when they are forwarded through the Communications queue.

- **Grant Full Access** by assigning **Write** privileges to **Task - Patient Portal - List** and **Task - Patient Portal**. In this scenario, the user:
 - Will have full Patient Portal message access without restrictions

- **Grant Limited Access (response only)** by assigning **Write** privileges to **Task - Patient Portal**. In this scenario, the user:
 - Receives a security message if they attempt to open it
 - Can respond to forwarded Patient Portal messages via the Communications queue

5. Press the **Save** button to save your changes.



Pro Tip: Frequently a new individual role is created to assign this security access to. For example, you could create a role for Patient Portal Communications Only and then you can add in users you wish to have that limited Patient Portal Message access.

Permission Behavior

- Access is role-based only
 - Off = no access
 - Write = full access to view and respond
 - **Read/Update do not restrict functionality but instead behave as Write access**
-