

Patient Portal Parent Experience: Complete Registration With a PIN

Complete Your Patient Portal Registration

Depending on how the practice issued you a PIN, follow the steps below to complete the registration for the Patient Portal.

If you were sent a Welcome email:

1. Click the link in the email to access the Patient Portal.
2. Enter **your** (the parent/guardian) information.
3. Accept the Terms & Conditions, and click **Continue**.
4. Enter the information for the patient who was issued the PIN that is displayed.
5. (Optional) Click '**I'd like to add another child**' if a PIN was also provided for additional patients and enter that patient's information.
6. Click **Create My Account**.

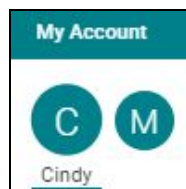
Note: If you received multiple Welcome emails from the IntelliChart, it is best to use the link in **one** email and use the others only to note the PIN(s) provided. The additional PINs will be entered in Step 5 above.

If you were not sent a Welcome email:

1. Navigate to the practice's Patient Portal URL.
2. Click **Let's Get Started**.
3. Enter **your** (the parent/guardian) email address, and create a password.
4. Click **Continue**.
5. Enter **your** (the parent or guardian) date of birth.
6. Select a security question, and provide the answer.
7. ~~Select who the PIN was issued for:~~
 - ~~**Myself** – you are the patient and have been issued a PIN to register yourself for the portal.~~
 - a. ~~Enter your PIN.~~
 - b. ~~Accept the Terms & Conditions.~~
 - c. ~~Click **Create My Account**.~~
 - **A child** = you are the parent/guardian of a patient of the practice.
 - a. Enter **your** (the parent/guardian) information.
 - b. Accept the Terms & Conditions.
 - c. Click **Continue**.
 - d. Enter the patient's date of birth.
 - e. Enter the PIN assigned to the patient.
 - f. (Optional) Click '**I'd like to add another child**' to enter another patient's date of birth and PIN.
 - g. Click **Create My Account**.

Patient Portal Tips

- Make sure to select the correct toggle button in the upper right-hand corner when accessing Portal information. The first toggle button is the parent, followed by toggles for each linked dependent.



- When composing a message, be sure to send the message **on behalf of the patient**.

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Patient Portal Homepage Navigation

The screenshot shows the Patient Portal homepage for a user named Cindy. The interface includes a navigation panel on the left, a main content area with a greeting and three suggestion tiles, and a footer with legal notices and a copyright notice. Callout boxes provide instructions on how to use various features:

- Click the Toggle Menu button to expand and collapse the Navigation Panel.
- Choose to view the portal in English or Spanish.
- Manage your account details, add a child, or sign out.
- Use the toggles to determine whose information you are viewing on the portal.
- Click a suggestion tile to open the corresponding message or request window.
- Click the floating action button to display shortcuts to the suggestion tile actions.
- Use the Navigation Panel to access specific areas of the portal.
- Click the Home button to return to the homepage from anywhere in the portal.

Homepage Suggestion Tiles

After selecting the patient's toggle button, click one of the following actions on the homepage to:

- Request an appointment
- Send a message
- Request a medication refill



Note: Some features described in this guide may not be available.

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Request / Schedule an Appointment

Please contact the practice to find out their preferred method for requesting and scheduling new appointments.

Send a Message

Note: If this feature is not available, contact the practice.

1. From the patient's homepage, click the **Send a message** tile.
2. Confirm the patient displayed in the **On behalf of** field is the patient the message is regarding. If you want to send a message regarding a different linked patient, select that **Patient** from the drop-down menu.
3. Select the **Practice** and **Location** from the respective drop-down menus.
4. In the To field, select the **Addressee** for the message from the drop-down menu.
5. Enter a **Subject** of the message in the Subject field. If an attachment is necessary, click the **paperclip** button.
6. Enter the **Content** of the message, and click the **Send Message** button. A message is displayed at the top of the window confirming your message was sent to the practice.

Request a Medication Refill

Note: If this feature is not available, contact the practice.

1. From the patient's homepage, click the **Request a refill** tile.
2. Review the message in the Refill a Medication window, and click the **Continue** button.
3. Select the **Patient**, **Medication**, and **Request Group** from the drop-down menus.
4. *(Optional)* Select or add the **Pharmacy** you want the prescription to be sent to. You may add a new pharmacy by clicking **Add a Pharmacy**.
5. Click the **Submit** button. A message is displayed confirming your request was sent to the practice.

Request a Referral

Note: If this feature is not available, contact the practice.

1. From the patient's homepage, click **Appointments** in the Navigation Panel.
2. Click **Request a Referral** located on the right side of the window. The Request a Referral window is displayed.
3. Select **who** the referral is for from the drop-down menu.
4. Select the **practice** from the drop-down menu, and click the **Continue** button.
5. Review the **Request a Referral** message, and click the **Continue** button.
6. Select the **practice location** from the drop-down menu.
7. Select **who** the request is being sent to from the Recipient Group field.
8. Enter the **Reason** for the request.

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9. Enter your preferred **Schedule Availability**. This is available in the event that the practice schedules the appointment.
10. Click the **Send Referral Request** button. A message is displayed at the top of the window confirming your request was sent to the practice.

Request a Document

Note: If this feature is not available, contact the practice.

1. From the patient's homepage, click **My Chart** in the Navigation Panel to expand the chart menu.
2. Click **Documents**.
3. In the Request a Document section of the window, click **Request a Document**. The Request a Document window is displayed.
4. Select **who** the document request is for from the drop-down menu.
5. If prompted, select the **practice** from the drop-down menu.
6. Complete the request information:
 - If a list of Available Documents is displayed:
 - a. Select the **document(s)** you would like to request.
 - b. Click the **Send Request** button.
 - If a list of Available Documents is not displayed:
 - a. Click the **Send a secure message** button.
 - b. Complete the fields in the Compose a new message window.
 - c. Click the **Send Message** button.

A message is displayed confirming your request or message was sent to the practice.