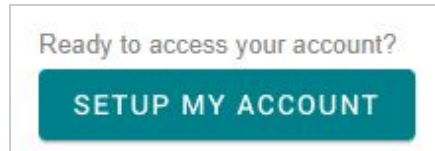


Patient Portal Parent Experience: Request a PIN & Complete Portal Registration

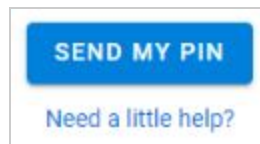
After you have received a Welcome email announcing the availability of the new Patient Portal, follow the steps below to request a PIN and complete the registration for your Patient Portal account!

1. From within the email, click **Setup My Account**.

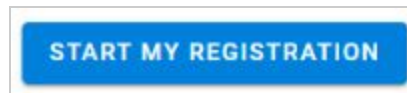


Important: If you received multiple Welcome emails from IntelliChart, for multiple children, you must complete steps 1-3 from each email you received so that a PIN is received for each patient.

2. Select how you would like to receive your PIN:
 - Select Text Message to receive a text with your PIN (recommended).
 - Select Phone Call to receive an automated call with your PIN.
3. Click **Send My PIN**. If you need help or something doesn't look right, click **Need a little help?** for more info or contact the practice.



4. When you see the prompt that your PIN has been sent, click **Start My Registration** to go to the registration screen.



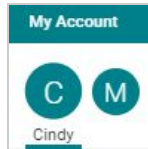
Important: If you requested and received PINs for multiple patients, this step must only be taken from **one of the PIN receipts**. **Do not click Start My Registration from more than one PIN receipt**. Step 10 below instructs on how to add additional children to the portal registration.

5. Enter **your** (the parent/guardian) email address and create a password.
6. Click **Continue**.
7. Enter **your** (the parent/guardian) information.
8. Accept the Terms & Conditions, and click **Continue**.
9. Enter the information for the patient whose PIN was received (either by Text Message or Phone Call).
10. (Optional) If you also received an email for an additional child, click '**I'd like to add another child**' and enter that patient's information. Repeat this step for all children who have been issued a PIN.
11. Click **Create My Account**.

Patient Portal Parent Experience: Request a PIN & Complete Portal Registration

Patient Portal Tips

- Use the toggle buttons in the upper right-hand corner when accessing Portal information. The first toggle button is the parent's account, followed by toggles for each linked child.



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

Patient Portal Homepage Navigation

The screenshot shows the Patient Portal homepage for a user named Cindy. The page features a navigation panel on the left, a main content area with a greeting 'Hi, Cindy' and the question 'What would you like to do today?', and a footer with legal notices. Callout boxes provide instructions on how to use various features:

- Click the Toggle Menu button to expand and collapse the Navigation Panel.** (Points to the hamburger menu icon in the top left)
- Choose to view the portal in English or Spanish.** (Points to the language selection dropdown in the top right)
- Manage your account details, add a child, or sign out.** (Points to the 'My Account' link in the top right)
- Use the toggles to determine whose information you are viewing on the portal.** (Points to the 'C' and 'M' toggle buttons in the top right)
- Click the Home button to return to the homepage from anywhere in the portal.** (Points to the home icon in the navigation panel)
- Use the Navigation Panel to access specific areas of the portal.** (Points to the navigation panel icons)
- Click a suggestion tile to open the corresponding message or request window.** (Points to the 'Request a refill' tile)
- Click the floating action button to display shortcuts to the suggestion tile actions.** (Points to the '+' button in the bottom right)

Homepage Suggestion Tiles

After selecting the patient's toggle button, click one of the following actions on the homepage to: Request/schedule an appointment, Send a message, or 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.

Patient Portal Parent Experience: Request a PIN & Complete Portal Registration

7. Select **who** the request is being sent to from the Recipient Group field.
8. Enter the **Reason** for the request.
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.