Issue a Portal Registration PIN from the Appointment List (Practice Portal)

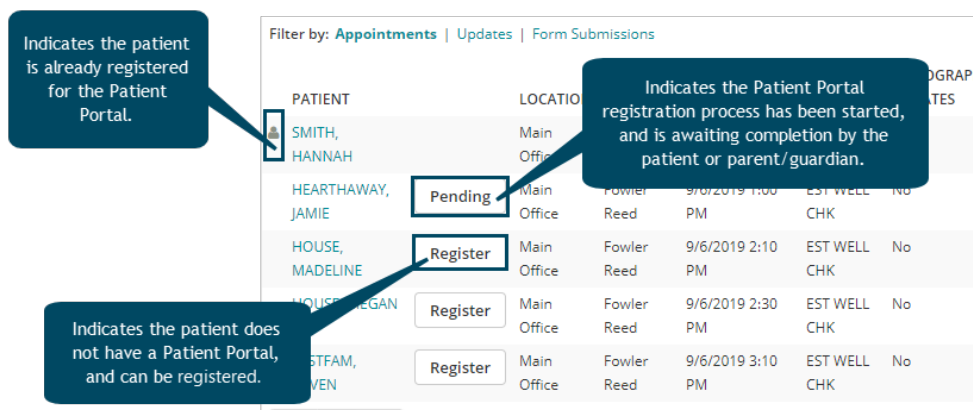Last Modified on 05/17/2022 9:53 am EDT

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About

Portal registration PINs can be generated from the Appointment List on the Dashboard of the OP Practice Portal. When a PIN is generated by clicking the **Register** button from the Appointment List, a welcome communication is sent to the parent at the email address or cell phone number entered. The welcome communication contains the URL for the portal as well as the PIN assigned to the patient.

Workflow

1. Navigate to the Dashboard: **Navigation Panel > Dashboard**.
2. Search for **Appointments** using the filters:

   - Filter by **Date Range**: Defaults to the current date but may be changed to access the list of appointments for future dates.
     1. Click in the Start Date field, and enter a date or click the calendar and select a date.
     2. Click in the End Date field, enter a date or click the calendar and select a date.
   - Filter by **Location**:
     1. Select a Location from the drop-down menu.
   - Filter by **Provider**:
     1. Click the **Select Provider(s)** button to display the Select Provider(s) window.
     2. Click a **Provider Name** in the panel on the left or to select all providers, click to **Select all providers**.
     3. Click the **Right Arrow** button to move the Provider to the panel on the right.
     4. Click the **Apply** button.

3. From the Appointment list, click the **Register** button located to the right of the patient's name. The Appointment List contains several indicators related to the patient's Portal status:

4. Complete the following fields:

   - **Register Patient with**: PIN is selected by default. To change, select the Verification Question radio button.
   - **Accessibility**: Full Access is selected by default, and this gives access to all areas of the Patient Portal that have been enabled by the practice. If the person receiving the PIN should not have access to medical information or a patient's demographics included in the My Chart section of the portal, such as in a foster situation, select **Limited: No Chart Access**.

- **Email Address**: Email Address is selected by default, enter the email address that will be used to access the Patient Portal.
- **Text Message** (optional): Select the radio button to receive the registration by text. Enter the cell phone number.
- **Cell Carrier** (optional): Select a Cell Carrier from the drop-down menu. Required if Text Message was selected.
- **Send to**: The Send to radio buttons, Parent/Guardian or Minor, display when registering a patient 12 or older. The default selection is Parent/Guardian.
- **Print PIN** (optional): Click Print PIN for a paper copy.
- **Do not send PIN** (optional): Select the radio button when the PIN information will not be sent.

5. Complete the patient registration page by selecting from the options below.

- Click the **Send PIN / Verification Question** button. This option would be used if a parent will complete the registration at a later time. A welcome email is sent to the parent so that they can create their portal account.
- Click the **Complete / Log In** button. This option would be used if a parent will complete the registration immediately. The Patient Portal registration page opens to complete the registration process and a welcome email is sent to the parent.