Generate a Patient Portal PIN From OP (Easy Button)

Last Modified on 05/17/2022 9:52 am EDT

About

In order to generate a PIN for the OP Patient Portal from within OP, the logged-in user must be associated with a staff record in the Practice Portal. A PIN can be generated for an individual patient or siblings from the Family Contacts in the Patient Chart and from a patient's appointment. The steps to generate the PIN(s) are the same regardless of where in OP you are generating the PIN(s). Once the PIN is generated from OP, the patient's status in the OP Practice Portal will remain *Pending* until the PIN is entered during the parent's completion of the registration. The patient's status will then be updated to *Registered*.
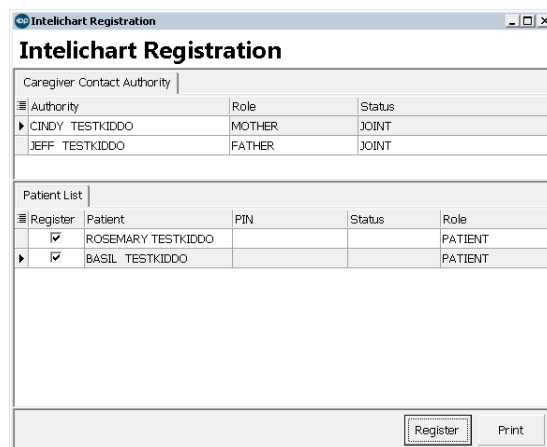
Generating a PIN from OP does not send a welcome email By providing the parent/guardian a PIN, you as the practice representative are authenticating the parent/guardian's association with the patient. Parents/guardians should be directed to the Paper section of the **Patient Portal Parent Experience: Complete Registration With a PIN QRG**for steps on how to complete their registration with a PIN.

Workflow

Important: If you're completing this workflow for patients registered with an unofficial name, such as Baby Boy or Baby Girl, you must update the patient's Basic Info to reflect their given name before issuing a PIN.

1. Navigate to the patient's Family Contacts:**Clinical, Practice Management, or Billing tab > Patient Chart button > Search for and select patient > Family Contacts** or to the scheduled appointment on the calendar:**Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button > double-click on the patient appointment.**
2. Click the **Create/Validate Portal Account** button 🖳 :

   - In the Family Contacts record, this is located to the right of the Home Email field.
   - In the Add/Edit Appointment window, this is located to the right of the Arrival Time clock.

The Intelichart Registration window is displayed listing the parent/guardian information at the top of the window and patient and linked patient/sibling information at the bottom of the window.

3. Deselect the **Register checkbox** for any child who you do not wish to register for the portal at this time.
4. Click the **Register** button. The PIN(s) populate(s) in the PIN field of the window for each patient. Once this is done, the portal Status of the patient(s) is updated to "Pending Registration" on the Practice Portal.

Patient List

Register	Patient	PIN	Status	Role
☑	ROSEMARY TESTKIDDO	JFKAYTTJYV	Complete	PATIENT
☑	BASIL TESTKIDDO	NVTHFPCJIQ	Complete	PATIENT

> ⓘ **Warning**: The below error will display when the logged in user has not been associated to a Practice Portal user. For additional information on setting up staff in the Practice Portal, click **here**.
>
>
>
> Error ✕
>
> ❌ Error in Access Request PIN: The following error occured:
> {"success":false,"pin":null,"errorMessage":"Staff must have an active portal account"}
>
> URL > 172.17.17.32:8764/account/pins
> RequestBody >
> {"opMedId":"60","localPatientId":"224","localSta...:"331"}
>
> OK
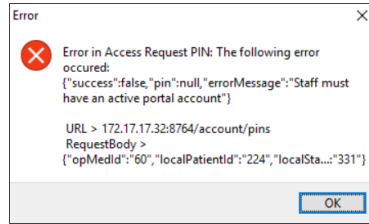
5. Click the **Print** button to provide the parent with a print-out of the PIN(s) and portal URL. Once the parent completes the creation of their portal account using the PIN(s) provided, the patient(s) status on the Practice Portal is updated to "Registered".

Intelichart Registration for Patient ROSEMARY TESTKIDDO and selected Siblings

Navigate to https://patientportal.intelichart.com to complete registration.

Patient List

Register	Patient	PIN	Status	Role
☑	ROSEMARY TESTKIDDO	JFKAYTTJYV	Complete	PATIENT
☑	BASIL TESTKIDDO	NVTHFPCJIQ	Complete	PATIENT

6. Close the Intelichart Registration window.