Issue an InteliChart Portal Registration PIN from Patient Administration (InteliChart Practice Portal)

Last Modified on 10/17/2024 4:17 pm EDT

Version 20.10

About

InteliChart Portal registration PINs can be generated from the Patient Administration section of the InteliChart Practice Portal. When a PIN is generated from Patient Administration, 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

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 in OP to reflect their given name before issuing a PIN.

1. Navigate to Patient Administration: **Navigation Panel > Patient Administration**
2. Search for the patient:
    a. Click the **Account** button in the Search Patients panel.
    b. Enter information in one of the search fields: Last name, First name *or* Date of Birth.
    c. Select a Search Option from the **Search by** drop-down menu. To find patients that are not registered, select **Self Registered** or **Unregistered**.
    d. Click the **Search** button.
3. Click the **Select** button in the Actions column or the patient name to begin the registration. The Patient Account page is displayed.
4. Click **Register Patient** in the Account Settings panel. The Patient Registration window is displayed.
5. 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 which 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): Click the radio button when the PIN information does not need to be sent.
6. 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.