

Workflow: PIN Generation for Multiple Patients of the Same Family

Last Modified on 10/17/2024 4:19 pm EDT

About

Because registration for the IntelliChart Patient Portal, powered by IntelliChart, is PIN-based, it is important to understand methods for generating PINs for multiple patients of the same family both from OP and from the IntelliChart Practice Portal.

Important: Before issuing PINs 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.

Generate Multiple PINs from OP

To learn how to generate multiple PINs for related patients from within OP, review [Generate a Patient Portal PIN From OP \(Easy Button\)](#). Please note that this method of PIN generation does not trigger the sending of a Welcome email. Once the parent accesses the OP Patient Portal URL located at the top of the PIN printout, they will complete the Account creation with the instruction found in the [IntelliChart Patient Portal Parent Experience: Complete Registration With a PIN QRG](#). They must select the option to **add another child** during the creation of their portal account, and input the PINs received for additional children.

Generate Multiple PINs from the IntelliChart Practice Portal

To prevent parents/guardians from creating multiple portal accounts, follow the workflow described below.

1. Generate a PIN for one patient from either [Patient Administration](#) or from the [Appointment List](#). Be sure that the **Do not send PIN** checkbox is not selected for this child. This ensures that a Welcome Email is sent to the parent/guardian at the email address provided.
2. Complete the PIN generation for this patient.
3. Begin the PIN generation process for the next patient/sibling.
4. In the **Registration** window, select the **Do not send PIN** checkbox.
5. Print the PIN and distribute it to the parent/guardian or write it down for them.
6. Complete the PIN generation. A Welcome Email will not be sent for this patient.

Once the parent/guardian receives the Welcome Email for the first child, they will be presented with the option **I'd like to add another child**, while creating their portal account. If they bypass this option, they can still add PINs for the remaining child/ren in their portal account by navigating to: **My Account > Add child/dependent**. Here, they will enter the date of birth and associated PIN for the next child.