Complete Portal Self-Registrations in OP (New Patient Workflow)

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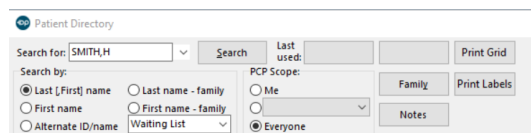
Version 20.4

About

Completing the registration for a new patient that Self-Registered on the Patient Portal begins with a message received in OP by staff associated with the **New Registration** department. **If staff has not been added to the New Registration department, the messages are sent to the OP administrative user, $AD.** The message for a Self-Registered patient may take between 5 to 15 minutes to be visible in the Unread Portal tab in OP. Below is the workflow that will allow the practice to add a Self-Registered patient to OP.

1. Navigate to the Unread Portal tab in the Message Center: **Main Navigation Panel > Portal**
2. Click to select the **New Patient Registration** message.
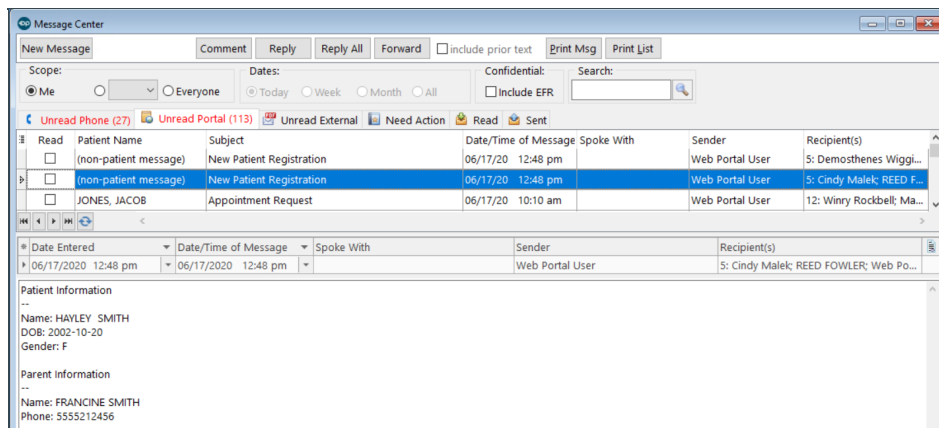
3. Click into the Patient Name field and click the **Patient Search** button 👤 .
4. Using the patient information included in the body of the message, enter the search parameters for your patient:

   a. Enter the patient's name (last name, first name) in the **Search for** field.
   b. Click the Status drop-down and select **Waiting List**.

5. Click the **Search** button.
6. Select the patient, and click the **Select** button. The Patient Name field on the message updates with the selected patient.

> 💡 **Tip:** If the Self-Registration is for a patient with a future date of birth, this is as far as you can go with completing the patient's registration in OP. We recommend that patients who have not yet been born remain with a Waiting List status until they have a confirmed actual date of birth. Once the parent contacts the practice with the child's date of birth and sex, you can proceed with the following steps. If a report of all patients with a Waiting List status is needed, use the **Demographic Analysis and Recall** to run a report with the Active Patients Only checkbox deselected, and a filter on the Pat Status column to only show Waitlist.

7. Navigate to the **Patient Chart** and complete the below information.

> 📌 **Note**: The status of the patient remains as Waiting List. The practice will need to establish their specific workflow in completing the new patient record and when the status of the patient is changed to Active. It is recommended that the practice call the parent and complete the record before changing the status to Active.

- **Family Contacts**: The following information is needed to complete the family contact record: Home email, Preferred Contact Methods, Role/Reason, Authority, and Res?.
- **Insurance**: Add all insurance information for the patient.
- **Basic Information**: The following information must be entered in the Demographics window: Primary phone, PCP, change the Status to Active and enter the date.

8. Click the **Save** button.