OP Patient Portal: Parent Toolkit

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This toolkit has everything your parents need to set up and use their Patient Portal accounts!

❗ Important Notes About the Content of this Page

Sharing of OP Help Center articles with parents is strongly discouraged. Refer to the **sharing instructions** at the top of each resource page to learn how to share the content outside of the Practice. Also, the content of these resources is subject to change. We recommend that you take note of the **Last Updated** information for each resource to ensure that you are providing your parents with the most up-to-date resources and make adjustments, as needed.

🎥 **Videos**: Short videos to introduce the Patient Portal and provide direction to parents.	
Video Name	**Video Use / Contents**
OP Patient Portal Parent Experience: Patient Portal (English) Video *Last updated for InteliChart 3.5.16 release*	**Intended for**: Parents new to the OP Patient Portal, powered by InteliChart. **Contents**: Portal navigation, instructions for completing registration from a Welcome Email, and instructions for sending a portal message and scheduling an appointment.
OP Patient Portal Parent Experience: Patient Portal (Spanish) Video *Last updated on 9/28/2020*	**Intended for**: Parents new to the OP Patient Portal, powered by InteliChart. **Contents**: Portal navigation, instructions for completing registration from a Welcome Email, and instructions for sending a portal message and scheduling an appointment in Spanish.

📖 **Quick Reference Guides (QRGs)**: Brief PDFs of how-to steps to help your parents navigate and use the portal.	
Patient Portal Registration QRGs	
QRG Name	**QRG Use / Contents**
OP Patient Portal Parent Experience: Complete Registration with a PIN QRG (English) *Last updated for InteliChart 3.5.17 release*	**Intended for**: Parents who are issued Patient Portal Registration PINs via the Easy button in OP or via the InteliChart Practice Portal. **Contents**: Steps for completing portal registration (with or without a Welcome email) and basic Patient Portal navigation.
OP Patient Portal Parent Experience: Complete Registration with a PIN QRG (Spanish) *Last updated for InteliChart 3.5.17 release*	**Intended for**: Parents who are issued Patient Portal Registration PINs via the Easy button in OP or via the InteliChart Practice Portal. **Contents**: Steps for completing portal registration (with or without a Welcome email) and basic Patient Portal navigation, in Spanish.
OP Patient Portal Parent Experience: New Patient Registration (without a PIN) QRG (English)	**Intended for**: Parents of patients who are not yet established patients of the practice. **Not intended for**: Families who are already registered for the portal that are adding a new patient to the practice. The parent should be

Last updated for InteliChart 3.5.17 release	instructed to add the patient via PIN entry directly from the Patient Portal, under **My Account**. **Contents**: Steps for registering for the practice via the Patient Portal and basic Patient Portal navigation.
OP Patient Portal Parent Experience: New Patient Registration (without a PIN) QRG (Spanish) *Last updated for InteliChart 3.5.17 release*	**Intended for**: Parents of patients who are not yet established patients of the practice. **Not intended for**: Families who are already registered for the portal that are adding a new patient to the practice. The parent should be instructed to add the patient via PIN entry directly from the Patient Portal, under **My Account**. **Contents**: Steps for registering for the practice via the Patient Portal and basic Patient Portal navigation, in Spanish.
OP Patient Portal Parent Experience: Request a PIN & Complete Portal Registration Use only when Automated Enrollment is enabled *Last updated for InteliChart 3.5.17 release*	**Intended for**: Practices that have enabled **Automated Enrollment**. Visit the linked resource for further guidance before distributing this guide to parents. **Contents**: Steps a parent will take to set up their portal account after receiving a registration email prompted by Automated Enrollment. This guide also includes the basic Patient Portal navigation.
Other Portal Action QRGs	
OP Patient Portal Parent Experience: Schedule an Appointment QRG *Last updated on 11/20/2020*	**Intended for**: Practices that have either Appointment Requests or Live Scheduling configured for their parents to request or schedule appointments from the Patient Portal. **Contents**: Steps a parent will take to request or schedule an appointment from the Patient Portal.
OP Patient Portal Parent Experience: Bill Pay QRG Use only when Bill Pay is enabled *Last updated on 8/28/2020*	**Intended for**: Parents who would like to make payments toward their patient balance from within the Patient Portal. **Contents**: A snapshot of the Bill Pay section of the portal and steps for making a payment.
OP Patient Portal Parent Experience: Clinical Summary *Last updated on 3/19/2021*	**Intended for**: Practices that want to provide their parents/patients information on how to access the Clinical Summary on the Patient Portal. The Clinical Summary includes a combination of Chart data as well as Encounter-specific data, such as diagnoses and Patient Instructions. This is especially useful for practices that either do not share **Patient Exit Notes** to the portal or who do share Patient Exit Notes but do not include Patient Instructions. **Contents**: Steps a parent will take to access a patient's Clinical Summary in the portal.