

### Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

# Workflow: Provide Portal Access to an Additional Parent

Last Modified on 12/07/2020 11:37 am EST

## Overview

Additional parents who need their own access to a patient's portal account must be provided a PIN. However, because only one issued PIN is active at a time, **the patient must already be registered for the portal** in order for the second parent to be able to create a portal account.

Below are two options for an additional parent to create their own portal account. In the sections below:

- **Parent A** refers to the parent who was initially provided a PIN and completed the patient's portal registration with that PIN.
- **Parent B** refers to the additional parent that needs their own access to the patient information in the patient portal.

## Parent B Uses the Same PIN that was Provided to Parent A

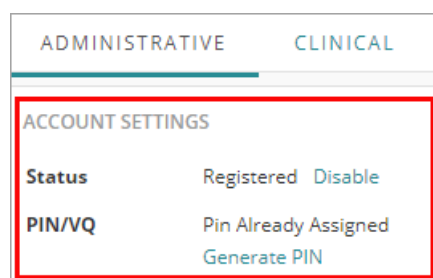
The same PIN can be used by multiple parents to create separate portal accounts.

- Parent A receives a PIN and creates a portal account by either following link in the welcome email or by navigating to the OP Patient Portal URL from the printout.
- Parent B navigates to the portal URL and creates their own account by entering the same PIN for the child when prompted to do so.
- Both parents will be listed in the Associations section of the patient's account on the OP Practice Portal.

## Parent B is Issued Their Own PIN

Once the patient has been registered for the portal by Parent A, an additional PIN can be sent to Parent B from the OP Practice Portal. Follow the steps below:

1. Navigate to the patient's account in the Practice Portal: **Practice Portal > Patient Administration > Account button > search for and select the patient.**
2. In the Account Settings of the Administrative tab, confirm the following:
  - **Status** = Registered
  - **PIN/VQ** = Pin Already Assigned



ADMINISTRATIVE	CLINICAL
ACCOUNT SETTINGS	
Status	Registered Disable
PIN/VQ	Pin Already Assigned Generate PIN

3. Click **Generate PIN**. The Patient Registration window is displayed.
  4. Complete the following fields:
    - **Register Patient with:** PIN is selected by default. To change, select the Verification Question radio button.
    - **Email Address:** Email Address is selected by default. Select Parent B's email address using the drop-down or select Other and enter it manually.
    - **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.
  5. 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.
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