

Workflow: Provide IntelliChart Portal Access to an Additional Parent

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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 IntelliChart 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

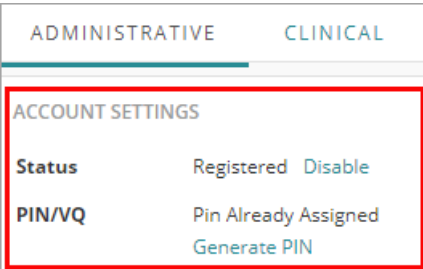
The same PIN can be used by multiple parents to create separate portal accounts.

- 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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