

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**

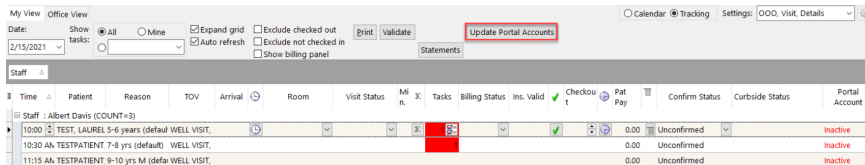
Update Portal Account Status

Last Modified on 02/15/2021 10:06 am EST

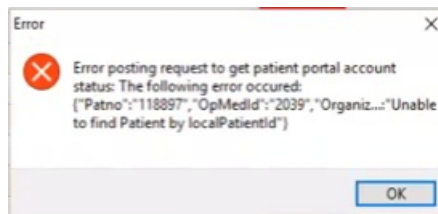
Overview

The ability to validate and view a patient's portal account status is possible from the Tracking window. It is recommended the **Update Portal Accounts** button is selected each morning to view the up-to-date information as the practice begins to see patients. If necessary, this button may be selected throughout the day. It is important to note, depending upon the total number of patients scheduled for the day, the update may take time to run.

1. Navigate to the Tracking window: **Clinical, Practice Management or Billing tab > Schedule > Tracking radio button**
2. Click the **Update Portal Accounts** button.



3. If a patient is currently not found on the IntelliChart Practice Portal, the below message will display.



4. Click **OK** to continue with the update.



Note: The above error message is information only informing the practice a patient on the schedule is not available on the IntelliChart Patient Portal. Once the OK button is selected the update will continue.