

OP Practice Portal: Limit or Remove Parent Access to a Portal Account + Issue a PIN to a Minor

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About

Access to a patient's portal account extends beyond the generating and distributing of registration PINs. Also taken into consideration are the Minor Age Limit set by the Practice and the age at which a minor is recognized to be of age to have individual access to their portal account.

- **Minor Age Limit:** When a **patient reaches the Minor Age Limit** set in the Practice Portal, the parent(s) will automatically be disabled upon login to the patient record on the Patient Portal. In order to extend the parents' access to the portal, they would need to be added as a **Proxy**, at the request of the patient.
- **Age at which patients can have their own portal access:** Patients 12 years and older may have access to their own health record via a Patient Portal account. In order for this to be granted without a parent also having access or if the parents' access is removed (see below), the patient must first be added as a Family Contact in their chart in OP.

Below, you'll learn how to:

Remove or Limit a Parent/Guardian's Access to a Patient Portal Account

The following steps should be taken to remove a parent's access entirely or change their access to Limited. Limited Access allows a parent or guardian to communicate with the Practice for the purpose of requesting appointments and sending messages but prohibits them from seeing Chart information and requesting Medication Refills. This is useful when dealing with foster situations where a patient's Demographic information must be hidden, or when an older patient requests medical privacy from his or her parent or guardian. Removal of portal access would need to be completed in the case of the loss of a parent or guardian who had sole access to the patient's portal account, and a PIN will be issued to the patient (if over 12 years old).

**The Request a Refill button is still visible at this time but is not functional for parents or guardians with Limited Access. This button will be removed in a future IntelliChart release.*

1. In the Practice Portal, navigate to Patient Administration: **Main Navigation Panel > Patient Administration**.
2. Search for the patient.
 - a. Click the **Account** button in the Search Patients panel.
 - b. Enter information in one of the search fields: **Last name**, **First name**, or **Date of Birth**.
 - c. In the **Search by** field, click the drop-down and select **Registered**.
 - d. Click the **Search** button.
3. Locate the patient, and click the **Select** button in the Actions column.
4. Remove or edit access:
 - a. In the Associations section of the Administrative tab, locate the parent or guardian whose access should be updated, and click their current Access Level. For example, in the image below, you would click **Full Access**.

ASSOCIATIONS		
Mom Test	Child/Dependent	Full Access

- b. In the Update Access window, select the radio button for **Limited: No Chart Access** or **Remove Access**.
- c. Click the **Update Access** button.

Give a Minor Patient (12 or older) Access to their Patient Portal Account

1. Add the minor child as their own **Family Contact** in OP. This is recommended if the patient is to receive their own notifications and reminders.
2. In the Practice Portal, navigate to Patient Administration: **Main Navigation Panel > Patient Administration**, and search for the patient.
 - a. Click the **Account** button in the Search Patients panel.
 - b. Enter information in one of the search fields: **Last name, First name, or Date of Birth**.
 - c. In the **Search by** field, click the drop-down and select **Registered**.
 - d. Click the **Search** button.
3. Locate the patient, and click the **Select** button in the Actions column.
4. Click **Generate PIN** in the Account Settings section and complete the following fields.
 - **Register Patient with:** PIN is selected by default. To change, select the Verification Question radio button.
 - **Accessibility:** Full Access is selected by default, and this gives access to all areas of the Patient Portal that have been enabled by the Practice.
 - **Email Address:** Email Address is selected by default. Click the drop-down and select an email address from the list or enter the email address which will be used to access the Patient Portal.
 - **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. This is required if Text Message was selected.
 - **Send to:** The default selection is Parent/Guardian, but you'll select **Minor**. Minor is only displayed as an option when generating a PIN for a patient who is 12 or older.
 - **Print PIN (Optional):** Click **Print PIN** for a paper copy.
 - **Do not send PIN (Optional):** Select the radio button if 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 the minor patient will complete the registration at a later time. A welcome email is sent to the minor patient so that they can create their portal account.
 - Click the **Complete / Log In** button. This option would be used if a minor patient will complete the registration immediately. The Patient Portal registration page opens to complete the registration process and a welcome email is sent to the minor patient.