Creating New Parent/Guardian Accounts in the OP Portal

Last Modified on 11/04/2024 4:39 pm EST

About

In order to register a parent for the portal, they only need to be added as a contact with certain fields configured. The below steps will help you add a parent as a contact and register them for the OP Portal.

- Register a Parent/Create an Account
- Register a Patient When They Reach Age of Majority
- Resend the Welcome Email
- Parent Login

Register a Parent/Create an Account

The parent must be associated with the patient in OP as a Family Contact.

1. Navigate to the **Patient Chart** > **Family Contacts**.
2. Add a new contact or select an existing contact.
3. Confirm or add the following required fields to register a parent/guardian for the OP Portal:
   - **Home Email**: Enter the parent's home email (used for Welcome email and to login, if your practice does not have passwordless login enabled).
   - *(Optional, based on configuration)* **Cell Phone**: Enter the parent's cell phone number. Must be entered if your practice has chosen to use passwordless login
   - **Authority**: For the parent to have access to the OP Portal, they must have either *Joint* or *Exclusive* selected as the Authority. *Note*: Resides with is not required.

> **Please note**: If a parent/guardian is also a patient at your practice, *the Welcome email will* <u>*not*</u> *be sent if their entry in their own Family Contacts is listed "Self" as the* **Role/Reason**.
>
> To send the Welcome Email and allow the parent/guardians portal account to show their own patient account as well as their dependent(s),
> 1. Navigate to their own **Patient Chart** > **Family Contacts**.
> 2. Select the **Role/Reason** of '*Other Relative*' (CANNOT be listed as 'Self').
> 3. Ensure the **Authority** is set to either '*Joint*' or '*Exclusive*'.
> 4. Ensure the **Email address** matches what is on the Family Contacts for the dependent.
>
> This will allow the patient show up as a dependent when they log in so they can access their portal account and their dependent's without having two logins.

4. The Welcome Email will be sent automatically once the Authority of Joint or Exclusive has been selected.
   - The **Portal Status** column will show as <u>Active</u> when the parent first logs into the OP Portal.
5. Repeat the process for each patient related to the parent.

Register a Patient When They Reach Age of Majority

To register a Patient for their own OP Portal account once they reach your state's age of majority, you must add them as a Family Contact in their own Patient Chart.

1. Navigate to the **Patient Chart** > **Family Contacts**.
2. Add a new contact or select an existing contact.
3. Confirm or add the following required fields to register the patient for the OP Portal:
   - **Home Email**: Enter the patient's home email (used for Welcome email and to login, if your practice does not have passwordless login enabled).
   - **Role/Reason**: Select _Other Relative_. DO NOT select 'Self' - the Welcome email will not be sent.
   - **Authority**: Select _Joint_ or _Exclusive_.
   - _(Optional, based on configuration)_ **Cell Phone**: Enter the patient's cell phone number. Must be entered if your practice has chosen to use passwordless login
4. The Welcome Email will be sent automatically once the Authority of Joint or Exclusive has been selected.
   - The **Portal Status** column will show as _Active_ when the patient first logs into the OP Portal.

Resend the Welcome Email

If a parent needs the Welcome email resent, navigate to the **Patient Chart** > **Family Contacts**, then:

- Adjust the **Authority** level and click **Save**, then the email will be resent. _OR,_
- Click the **folder** button next to the Email Address field, then click the **Register** button in the Caregiver Contact Authority tab.

Parent Login

The Parent will receive the Welcome Email in their inbox, and click on the link to log in. They must have their child's/their own **DOB**, and set up a new, unique **password** on first login.