

# Why can't the parent/guardian see the patient on their Portal account?

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If a parent/guardian cannot see one or more patients when they log into the portal, please follow the steps below to troubleshoot:

## Confirm Patient/Parent Details in OP

### Confirm Patient is Active in OP

1. Open the patient's **chart**.
2. Click on the **Basic Information** tab.
  - Confirm patient is **Active** OP patient.
  - Confirm there is **no email address** or **N/A**.

If you needed to make the patient Active, or clear their email address, wait a few minutes and then confirm that the patient now shows under the parent/guardian Portal account. If the patient is Active and has no email address, or N/A in the email address field, continue to the next section to troubleshoot further.

### Confirm the Parent/Guardian is Active in OP

1. From the Patient Chart, click on the **Family Contacts** tab.
2. Confirm the parent/guardian is added to the patient's Family Contacts.
3. Select the **parent/contact**.
4. Are they **Active**? If yes, continue on to the "Confirm Patient/Parent Details in the OP Portal" section.
5. If not,
  - Check for Duplicate Contacts in Contact Manager:
    1. In OP, go to **Practice Management** tab > **Contact Manager**
    2. First **search** by last name. If no duplicate found, search by email address.
    3. If duplicate found, use the [Merge Contacts](#) feature.
  - If no duplicate found, exit and go to **DAR (Demographic Analysis/Recall)**:
    1. Select **No date restrictions** and click **Search**.
    2. Now **sort** by *email address*. If no duplicates found, sort by *Date of Birth* (**Note**: this is only useful if your practice adds the DOB for contacts).
    3. If duplicate found, use the [Merge Contacts](#) feature.

If a duplicate was found, and you were able to use the Merge Contacts feature, wait a few minutes and then confirm that the patient now shows under the parent/guardian Portal account. If the parent/guardian still cannot see the patient, continue to the next section to troubleshoot further.

## Confirm Patient/Parent Details in the OP Portal

### Confirm Patient Details in the OP Portal

1. Navigate to the **Admin** side of the OP Portal > **Users**.
2. Search for the **patient** (last name+first name).
3. **Select** the patient.
4. Does the patient have a *@dummy.com* **email address**?
  - If Yes: Go to the next step.
  - If No: Manually change the email address to a *@dummy.com* email address. Wait a few minutes and then confirm

that the patient now shows under the parent/guardian Portal account.

5. Is **Role Patient**?

- If Yes: Continue on to the "Confirm Parent/Guardian Details in the OP Portal" section.
- If No: Contact OP for further support.

### Confirm Parent/Guardian Details in the OP Portal

1. On the Admin side, open **Profile**.
2. Click on **Caregivers**.
  - Confirm the parent/contact is listed here.
3. Navigate back to **Users**.
4. Search for **parent/contact**.
5. Select the parent/contact and click **Profile**.
6. Click on **Dependents**.
  - Confirm the patient is listed here.
7. Refresh the connection:
  1. Click on **Sources**.
  2. Click on **ellipsis** under the Actions column.
  3. Click **Disconnect** then **Confirm**.
  4. Click on the **ellipsis** again.
  5. Click **Connect** then **Confirm**.
  6. Wait 10-20 minutes and see if this resolved the issues.

If the patient still cannot be viewed by the parent/guardian, contact OP for further support.

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