

# Patient Portal Parent Experience: Complete Registration With a PIN

## Complete Your Patient Portal Registration

Depending on how the practice issued you a PIN, follow the steps below to complete the registration for the Patient Portal.

### If you were sent a Welcome email:

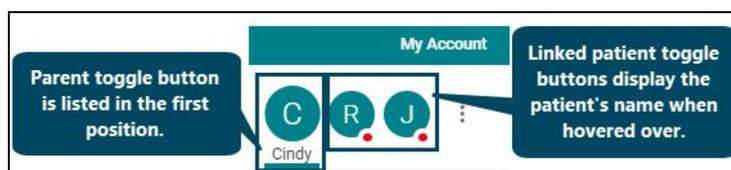
1. Click the link in the email to access the Patient Portal.
2. Enter **your** (the parent/guardian) information.
3. Accept the Terms & Conditions, and click **Continue**.
4. Enter the information for the patient who was issued the PIN that is displayed.
5. *(Optional)* Click 'I'd like to add another child' if a PIN was also provided for additional patients and enter that patient's information.
6. Click **Create My Account**.

### If you were not sent a Welcome email:

1. Navigate to the practice's Patient Portal URL.
2. Click **Let's Get Started**.
3. Enter **your** (the parent/guardian) email address, and create a password.
4. Click **Continue**.
5. Enter **your** (the parent or guardian) date of birth.
6. Select a security question, and provide the answer.
7. Select who the PIN was issued for:
  - **Myself** = you are the patient and have been issued a PIN to register yourself for the portal.
    - a. Enter your PIN.
    - b. Accept the Terms & Conditions.
    - c. Click **Create My Account**.
  - **A child** = you are the parent/guardian of a patient of the practice.
    - a. Enter **your** (the parent/guardian) information.
    - b. Accept the Terms & Conditions.
    - c. Click **Continue**.
    - d. Enter the patient's date of birth.
    - e. Enter the PIN assigned to the patient.
    - f. *(Optional)* Click **I'd like to add another child** to enter another patient's date of birth and PIN.
    - g. Click **Create My Account**.

## Patient Portal Tips

- Make sure to select the correct toggle button in the upper right-hand corner when accessing Portal information. The first toggle button is the parent, followed by toggles for each linked dependent.



- When composing a message, be sure to send the message **on behalf of the patient**.

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## Patient Portal Navigation

The screenshot shows the Patient Portal Parent Experience interface. Callout boxes provide the following instructions:

- Click here to return to your homepage from anywhere in the Portal.** (Points to the Pediatrics logo in the top left)
- Click these options to see more related information. Count badges indicate when new information is available!** (Points to the Messages widget in the left sidebar)
- Click one of the following options to perform the task.** (Points to the 'What would you like to do?' widget)
- Manage your account details, add a child/dependent, or sign out.** (Points to the 'My Account' link in the top right)
- Toggle between parent and child accounts. This determines whose information you are viewing on the Portal.** (Points to the 'C' and 'R' account toggle buttons)
- Here you'll find important links provided by the Practice!** (Points to the 'Practice Links' section in the left sidebar)
- Use these widgets to see snapshots of information and access these pages.** (Points to the 'Appointments' and 'Medications' widgets)

The interface includes a top navigation bar with 'My Account' and 'Customize' options. The main content area features a sidebar with navigation links (Messages, Appointments, Forms, Billing, My Chart, My Health, Health Education) and a 'Practice Links' section. The central area displays 'What would you like to do?' with options to request an appointment, refill medication, send a message, or request a referral. Below this are 'Appointments' and 'Medications' widgets, both showing 'No data available in table' and a 'MORE' link. A 'Health Library' widget is also present on the right.

## Homepage Actions

After selecting the patient's toggle button, click one of the following actions on the homepage to:

- Request an appointment
- Request a medication refill
- Send a message to the practice
- Request a referral

**\*Note:** Some options may not be available.

This close-up shows the 'What would you like to do?' widget with four action buttons: 'Request an appointment', 'Refill a medication', 'Send a message', and 'Request a referral'. Each button is accompanied by a relevant icon (calendar, pills, envelope, and person with arrow).

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## Request an Appointment

1. Click **Request an Appointment** from the patient's homepage or after clicking the **More** button from the Appointments section (or widget).
2. Select the **Patient** for whom the appointment is being requested, and click the **Continue** button.
3. Complete the **top section** of the Request an Appointment window.  
**Note:** If the patient's current insurance has changed from their last visit, select the **Add New Insurance** radio button and enter the **New Policy Information**.
4. Complete the **Preferred Appointment Times** section of the window, or select the **Next Available** checkbox.  
**Note:** Selecting the **Next Available** checkbox disables the time preference fields.
5. Click the **Request Appointment** button. You will receive confirmation from the practice when your request has been processed.

## Request a Medication Refill

1. From the patient's homepage, click **Refill a Medication**.
2. Select the **Patient**, **Medication**, and **Request Group** from the drop-down menus.
3. *(Optional)* Select or add the **Pharmacy** you want the prescription to be sent to. You may add a new pharmacy by clicking **Add a Pharmacy**.
4. Click the **Submit** button. A message is displayed confirming your request was sent to the practice.

## Send a Message

1. From the patient's homepage, click **Send a message**.
2. Confirm the patient displayed in the **On behalf of** field is the patient the message is regarding. If you want to send a message regarding a different linked patient, select that **Patient** from the drop-down menu.
3. Select the **Practice** and **Location**.
4. In the To field, select the **Addressee** for the message from the drop-down menu.
5. Enter a **Subject** of the message in the Subject field. If an attachment is necessary, click the paperclip icon.
6. Enter the **Content** of the message, and click the **Send Message** button. A message is displayed at the top of the window confirming your message was sent to the practice.

## Request a Referral

1. From the patient's homepage, click **Request a referral**.
2. Select **who** the referral is for from the drop-down menu.

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3. Select the **practice** from the drop-down menu, and click the **Continue** button.
4. Review the **Request a Referral** message, and click the **Continue** button.
5. Select the **practice location** from the drop-down menu.
6. Select **who** the request is being sent to from the Recipient Group field.
7. Enter the **Reason** for the request.
8. Enter your preferred **Schedule Availability**. This is available in the event that the practice schedules the appointment.
9. Click the **Send Referral Request** button. A message is displayed at the top of the window confirming your request was sent to the practice.

## Customize Your Homepage

Each patient's homepage is displayed in sections, or widgets, such as Appointments, Medications, Health Library, etc. These widgets can be added or removed from the homepage. Each widget contains a More button that can be clicked to display more information for the specific widget. You can return to the homepage by clicking the logo in the upper left-hand corner of the window.

### Remove a Widget

1. Hover over the widget that you would like to remove. The Remove button is displayed.



2. Click the **Remove** button. The widget is removed from the homepage. It can be added back by following the instructions below to add a widget.

### Add a Widget

1. Click  located in the upper right-hand corner of the window. The **Add widgets to my homepage** window is displayed.
2. Select the **checkbox(es)** for the widgets you would like to add to the homepage.  
**Note:** The list of available widgets is generic. Not all widgets may be available for your particular practice. For questions about what widgets are available, contact the practice directly.
3. Click the **Install Selected Widgets** button to save your changes. The homepage is updated with your widgets.