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**.

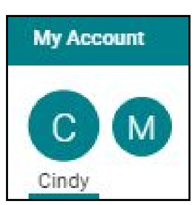
> **Note**: If you received multiple Welcome emails from the InteliChart, it is best to use the link in **one** email and use the others only to note the PIN(s) provided. The additional PINs will be entered in Step 5 above.

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.

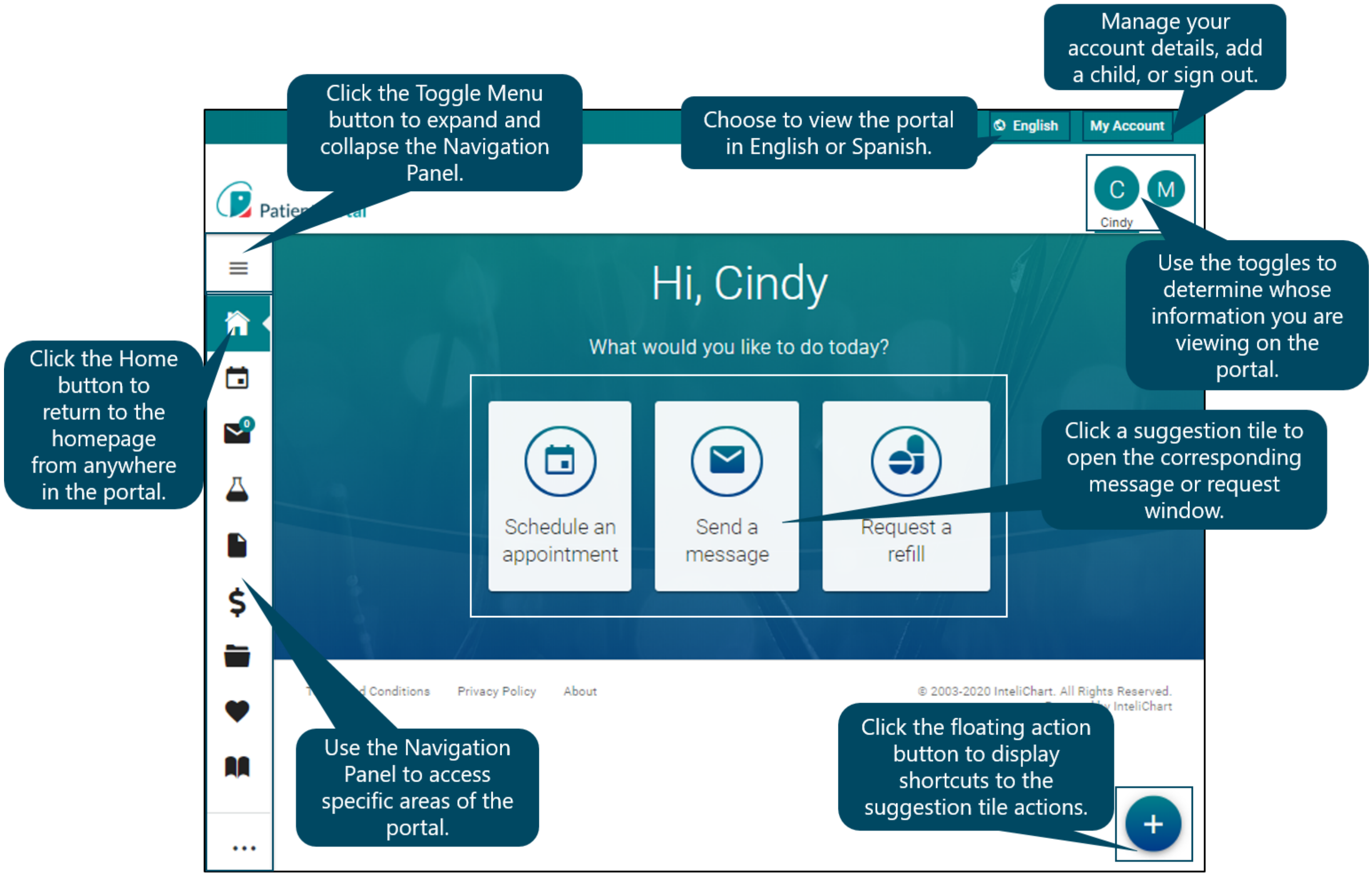


- When composing a message, be sure to send the message **on behalf of the patient**.

Patient Portal Parent Experience:

Complete Registration With a PIN

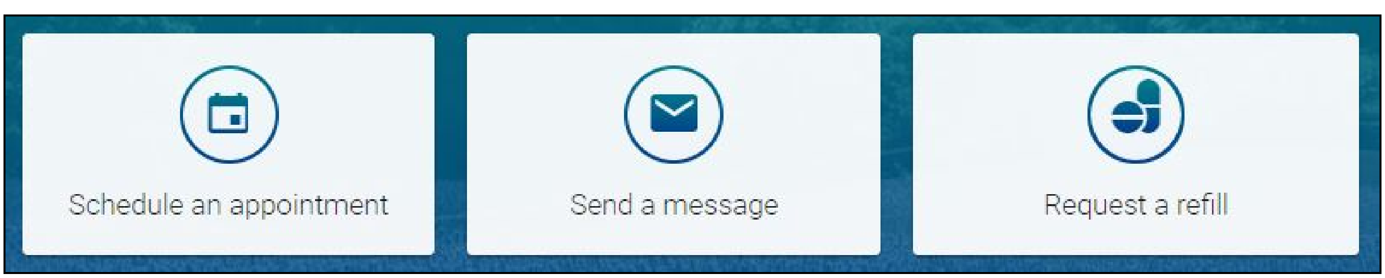
Patient Portal Homepage Navigation



Homepage Suggestion Tiles

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

- Request an appointment
- Send a message
- Request a medication refill



*__Note__: Some options may not be available.

Request an Appointment

1. From the patient's homepage, click the **Schedule an Appointment** tile. The Request an Appointment window opens.
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. A message is displayed confirming your request was sent to the practice.

Send a Message

1. From the patient's homepage, click the **Send a message** tile.
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** from the respective drop-down menus.
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** button.
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 Medication Refill

1. From the patient's homepage, click the **Request a refill** tile.
2. Review the message in the Refill a Medication window, and click the **Continue** button**.**
3. Select the **Patient**, **Medication**, and **Request Group** from the drop-down menus.
4. (*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**.
5. Click the **Submit** button. A message is displayed confirming your request was sent to the practice.

Request a Referral

1. From the patient's homepage, click **Appointments** in the Navigation Panel.
2. Click **Request a Referral** located on the right side of the window. The Request a Referral window is displayed.
3. Select **who** the referral is for from the drop-down menu.
4. Select the **practice** from the drop-down menu, and click the **Continue** button.
5. Review the **Request a Referral** message, and click the **Continue** button.
6. Select the **practice location** from the drop-down menu.
7. Select **who** the request is being sent to from the Recipient Group field.
8. Enter the **Reason** for the request.
9. Enter your preferred **Schedule Availability**. This is available in the event that the practice schedules the appointment.
10. Click the **Send Referral Request** button. A message is displayed at the top of the window confirming your request was sent to the practice.