Patient Portal Parent Experience:
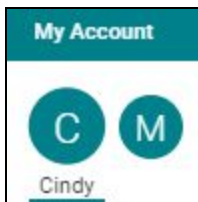
Register Without a PIN

Register for the Patient Portal Without a PIN

1. Navigate to the practice's 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/guardian) date of birth.
6. Select a security question, and provide the answer.
7. Select **I don't have a PIN**.
8. Enter *your* (the parent/guardian) first and last name.
9. Select *your* (the parent/guardian) sex.
10. Enter *your* phone number.
11. Enter the zip code of the practice to search for and select the practice.
12. If you are the parent/guardian of a patient of the practice, select the **I'd like to add a child** checkbox. If you are the patient, do not select this checkbox.
13. Accept the Terms & Conditions.
14. Click **Continue** (or **Create My Account** if you did not select the checkbox to add a child).
15. If you selected the checkbox to add a child in step 12, enter the child's first and last name, birthday, and sex.
16. *(Optional)* Click '**I'd like to add another child**' to enter an additional patient's information.
17. Click **Create My Account**.

Before you will have access to all the portal has to offer, the practice must take an additional step to validate your account. **Please contact the practice if you have any concerns or questions regarding your Patient Portal**.

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.
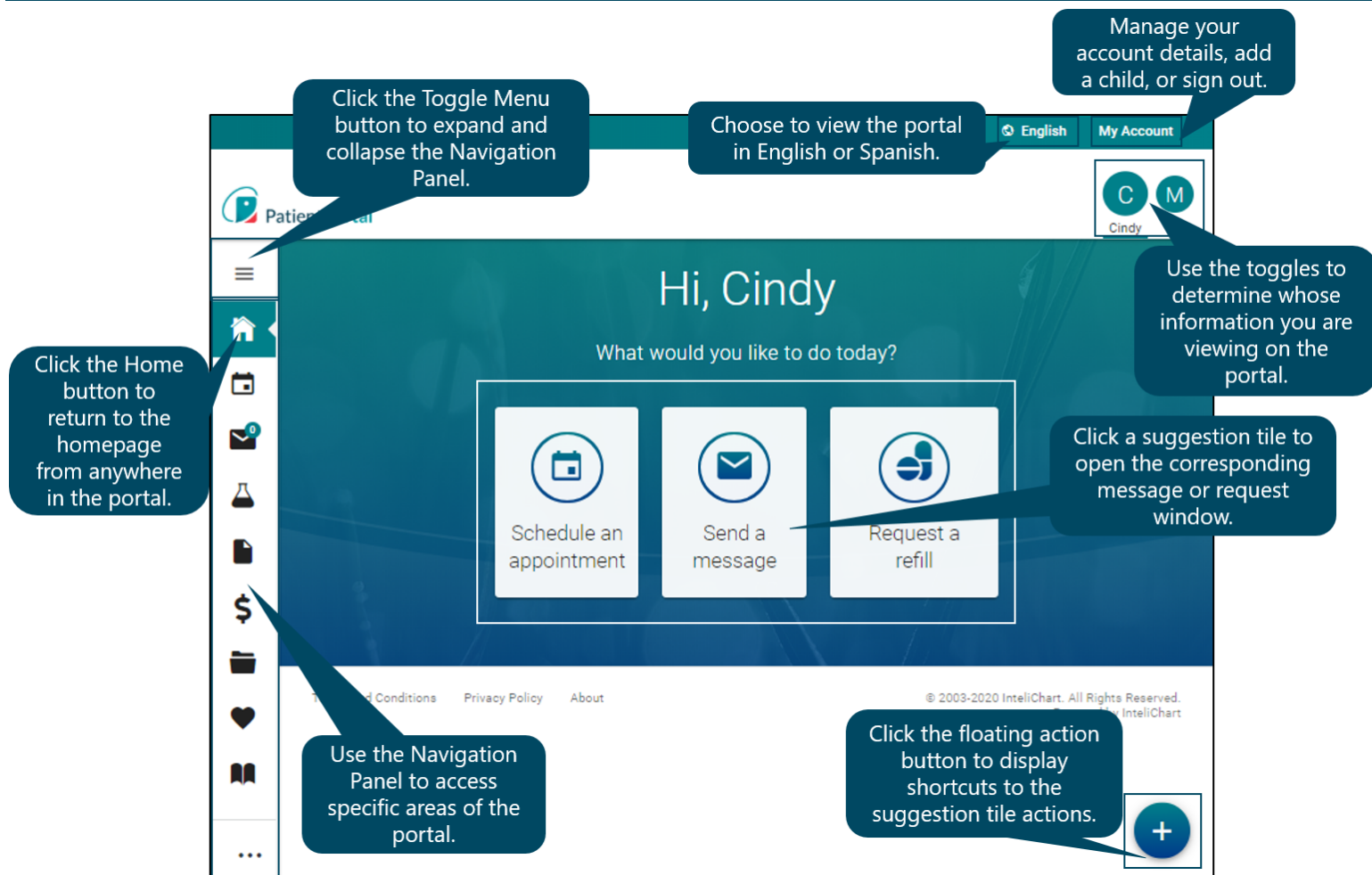

- When composing a message, be sure to send the message **on behalf of the patient**.

Patient Portal Homepage Navigation

Manage your account details, add a child, or sign out.

Click the Toggle Menu button to expand and collapse the Navigation Panel.

Choose to view the portal in English or Spanish.

Use the toggles to determine whose information you are viewing on the portal.

Click the Home button to return to the homepage from anywhere in the portal.

Click a suggestion tile to open the corresponding message or request window.

Use the Navigation Panel to access specific areas of the portal.

Click the floating action button to display shortcuts to the suggestion tile actions.

Homepage Suggestion Tiles

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

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

*Note: Some options may not be available.

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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.