

OP Patient Portal Registration Workflows

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Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Generate a Patient Portal PIN From OP (Easy Button)

Last Modified on 11/11/2019 8:54 am EST

The workflow described below is only available in OP version 20 or higher for clients who are using the new OP Patient Portal, powered by IntelliChart.

Overview

In order to generate a PIN for the OP Patient Portal from within OP, the logged-in user must be associated to a staff record in the Practice Portal. A PIN can be generated for an individual patient or siblings from the Family Contacts in the Patient Chart and from a patient's appointment. The steps to generate the PIN(s) are the same regardless of where in OP you are generating the PIN(s). Once the PIN is generated from OP, the patient's status in the OP Practice Portal will remain *Pending* until the PIN is entered during the parent's completion of the registration. The patient's status will then be updated to *Registered*.

Generating a PIN from OP does not send a welcome email By providing the parent/guardian a PIN, you as the practice representative are authenticating the parent/guardian's association to the patient. Parents/guardians should be directed to the section of the **Patient Portal Parent Experience: Complete Registration With a PIN QRG** with the heading "If you were not sent a Welcome email" for steps on how to complete their registration with a PIN.

Workflow

1. Navigate to the patient's Family Contacts: **Clinical, Practice Management, or Billing tab > Patient Chart button > Search for and select patient > Family Contacts** or to the scheduled appointment on the calendar: **Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button > double-click on the patient appointment**.
2. Click the **Create/Validate Portal Account** button  :
 - In the Family Contacts record, this is located to the right of the Home Email field.

- In the Add/Edit Appointment window, this is located to the right of the Arrival Time clock.

The Intelichart Registration window is displayed listing the parent/guardian information at the top of the window and patient and linked patient/sibling information at the bottom of the window.

Caregiver Contact Authority		
Authority	Role	Status
▶ CINDY TESTKIDDO	MOTHER	JOINT
▶ JEFF TESTKIDDO	FATHER	JOINT

Patient List				
Register	Patient	PIN	Status	Role
☒	ROSEMARY TESTKIDDO			PATIENT
☒	BASIL TESTKIDDO			PATIENT

3. Deselect the **Register checkbox** for any child who you do not wish to register for the portal at this time.
4. Click the **Register** button. The PIN(s) populate(s) in the PIN field of the window for each patient. Once this is done, the portal Status of the patient(s) is updated to "Pending Registration" on the Practice Portal.

Patient List				
Register	Patient	PIN	Status	Role
☒	ROSEMARY TESTKIDDO	JFKAYTTJYV	Complete	PATIENT
☒	BASIL TESTKIDDO	NVTHFPCJIQ	Complete	PATIENT

5. Click the **Print** button to provide the parent with a print-out of the PIN(s) and portal URL. Once the parent completes the creation of their portal account using the PIN(s) provided, the patient(s) status on the Practice Portal is updated to "Registered".

Intelichart Registration for Patient ROSEMARY TESTKIDDO and selected Siblings

Navigate to <https://patientportal.intelichart.com> to complete registration.

Patient List				
Register	Patient	PIN	Status	Role
☒	ROSEMARY TESTKIDDO	JFKAYTTJYV	Complete	PATIENT
☒	BASIL TESTKIDDO	NVTHFPCJIQ	Complete	PATIENT

6. Close the Intelichart Registration window.

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Issue a Patient Registration PIN from the Appointment List (Practice Portal)

Last Modified on 02/03/2020 8:39 am EST

The content below is relevant to the OP Patient Portal, powered by IntelliChart.

Overview

Patient registration PINs can be generated from the Appointment List on the Dashboard of the OP Practice Portal. When a PIN is generated by clicking the **Register** button from the Appointment List, a welcome communication is sent to the parent at the email address or cell phone number entered. The welcome communication contains the URL for the portal as well as the PIN assigned to the patient.

Workflow

1. Navigate to the Dashboard: **Navigation Panel > Dashboard**.
2. Search for **Appointments** using the filters:
 - Filter by **Date Range**: Defaults to the current date but may be changed to access the list of appointments for future dates.
 1. Click in the Start Date field, and enter a date or click the calendar and select a date.
 2. Click in the End Date field, enter a date or click the calendar and select a date.
 - Filter by **Location**:
 1. Select a Location from the drop-down menu.
 - Filter by **Provider**:
 1. Click the **Select Provider(s)** button to display the Select Provider(s) window.
 2. Click a **Provider Name** in the panel on the left or to select all providers, click to **Select all providers**.
 3. Click the **Right Arrow** button to move the Provider to the panel on the right.
 4. Click the **Apply** button.
3. From the Appointment list, click the **Register** button located to the right of the patient's name. The Appointment List contains several indicators related to the patient's Portal status:

Filter by: **Appointments** | Updates | Form Submissions

PATIENT	LOCATION	STATUS	DATE	TIME	EST WELL	NO
SMITH, HANNAH	Main Office					
HEARTHAWAY, JAMIE	Main Office	Pending	9/6/2019 1:00 PM		CHK	
HOUSE, MADELINE	Main Office	Register	9/6/2019 2:10 PM		CHK	
HOUSE, REGAN	Main Office	Register	9/6/2019 2:30 PM		CHK	
STFAM, JEN	Main Office	Register	9/6/2019 3:10 PM		CHK	

Callout boxes:

- Indicates the patient is already registered for the Patient Portal.
- Indicates the Patient Portal registration process has been started, and is awaiting completion by the patient or parent/guardian.
- Indicates the patient does not have a Patient Portal, and can be registered.

4. Complete the following fields:

- **Register Patient with:** PIN is selected by default. To change, select the Verification Question radio button.
- **Email Address:** Email Address is selected by default, enter the email address that will be used to access the Patient Portal.
- **Text Message** (optional): Select the radio button to receive the registration by text. Enter the cell phone number.
- **Cell Carrier** (optional): Select a Cell Carrier from the drop-down menu. Required if Text Message was selected.
- **Send to:** The Send to radio buttons, Parent/Guardian or Minor, display when registering a patient 12 or older. The default selection is Parent/Guardian.
- **Print PIN** (optional): Click Print PIN for a paper copy.
- **Do not send PIN** (optional): Select the radio button when the PIN information will not be sent.

5. Complete the patient registration page by selecting from the options below.

- Click the **Send PIN / Verification Question** button. This option would be used if a parent will complete the registration at a later time. A welcome email is sent to the parent so that they can create their portal account.
- Click the **Complete / Log In** button. This option would be used if a parent will complete the registration immediately. The Patient Portal registration page opens to complete the registration process and a welcome email is sent to the parent.

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Issue a Patient Registration PIN from Patient Administration (Practice Portal)

Last Modified on 02/03/2020 8:39 am EST

The content below is relevant to the OP Patient Portal, powered by IntelliChart.

Overview

Patient registration PINs can be generated from the Patient Administration section of the OP Practice Portal. When a PIN is generated from Patient Administration, a welcome communication is sent to the parent at the email address or cell phone number entered. The welcome communication contains the URL for the portal as well as the PIN assigned to the patient.

Workflow

1. Navigate to Patient Administration: **Navigation Panel > Patient Administration**
2. Search for the patient:
 - a. Click the **Account** button in the Search Patients panel.
 - b. Enter information in one of the search fields: Last name, First name or Date of Birth.
 - c. Select a Search Option from the **Search by** drop-down menu. To find patients that are not registered, select **Self Registered** or **Unregistered**.
 - d. Click the **Search** button.
3. Click the **Select** button in the Actions column or the patient name to begin the registration. The Patient Account page is displayed.
4. Click **Register Patient** in the Account Settings panel. The Patient Registration window is displayed.
5. Complete the following fields:
 - **Register Patient with:** PIN is selected by default. To change, select the Verification Question radio button.

- **Email Address:** Email Address is selected by default, enter the email address which will be used to access the Patient Portal.
- **Text Message** (optional): Select the radio button to receive the registration by text. Enter the cell phone number.
- **Cell Carrier** (optional): Select a Cell Carrier from the drop-down menu. Required if Text Message was selected.
- **Send to:** The Send to radio buttons, Parent/Guardian or Minor, display when registering a patient 12 or older. The default selection is Parent/Guardian.
- **Print PIN** (optional): Click Print PIN for a paper copy.
- **Do not send PIN** (optional): Click the radio button when the PIN information does not need to be sent.

6. Complete the patient registration page by selecting from the options below.

- Click the **Send PIN / Verification Question** button. This option would be used if a parent will complete the registration at a later time. A welcome email is sent to the parent so that they can create their portal account.
- Click the **Complete / Log In** button. This option would be used if a parent will complete the registration immediately. The Patient Portal registration page opens to complete the registration process and a welcome email is sent to the parent.

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Register a Patient While in the Office (With a PIN)

Last Modified on 11/04/2019 7:54 am EST

The content below is relevant to the OP Patient Portal, powered by IntelliChart.

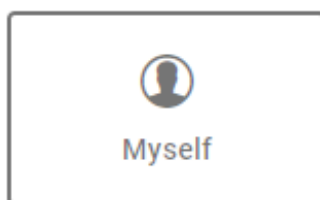
Overview

Practice staff may choose to assist a parent/guardian with the process of completing their portal registration while the parent/guardian is in the office. The workflow below assumes that the practice has printed a PIN from OP and issued it to the parent/guardian.

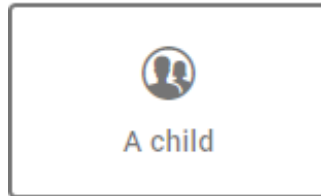
Workflow

To walk the parent through the registration with a PIN:

1. Navigate to the practice's Patient Portal URL located at the top of the OP printout.
2. Click **Let's Get Started**.
3. Enter the email address that will be used to access the portal, and create a password.
4. Click the **Continue** button.
5. Enter the parent/guardian's date of birth.
6. Select a security question, and provide the answer.
7. Select who the PIN was issued for:
 - **Myself** = the person registering for the portal *is* the patient and is of age to be creating their own portal account.



- a. Enter your PIN.
 - b. Accept the Terms & Conditions.
 - c. Click **Create My Account**
- **A child** = the person registering for the portal is the parent/guardian of a patient of the practice.



- a. Enter the parent/guardian's information.
 - b. Accept the Terms & Conditions.
 - c. Click the Continue button.
 - d. Enter the patient's date of birth.
 - e. Enter the PIN assigned to the child.
 - f. (*Optional*) Click **I'd like to add another child** and enter the next child's date of birth and PIN.
 - g. Click **Create My Account**
-

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Register a Patient While in the Office (Without a PIN)

Last Modified on 12/30/2019 1:40 pm EST

The content below is relevant to the OP Patient Portal, powered by IntelliChart.

Overview

Practice staff may choose to walk a parent/guardian through the process of registering for the OP Patient Portal while the parent/guardian is in the office. If the practice chooses *not* to issue a PIN to start this process, a custom URL *must* be established. Once the parent completes their information, the practice must authenticate the account creation in the Practice Portal by completing a Merge Match for the patient. **Note:** The workflow below can also be completed by the parent/guardian on their own at home if a custom URL has been provided to them.

Workflow

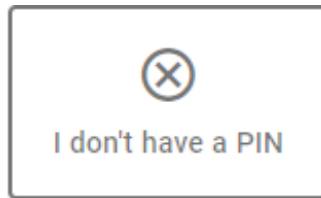
To walk the parent through the registration without a PIN:

Practice Staff:

1. Navigate to the practice's custom URL.
2. Click **Let's Get Started**.

Parent/Guardian:

1. Enter the email address that will be used to access the portal, and create a password.
2. Click the **Continue** button.
3. Enter the parent/guardian's date of birth.
4. Select a security question, and provide the answer.
5. Select **I don't have a PIN**.



6. Enter the parent/guardian's first and last name.
7. Enter the parent/guardian's sex.
8. Enter the parent/guardian's phone number.
9. Enter the zip code of the practice to search for and select the practice.
10. 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.
11. Accept the **Terms & Conditions**.
12. Click **Continue** (or **Create My Account** if you did not select the checkbox to add a child).
13. If you selected the checkbox to add a child in step 10, enter a child's first and last name, birthday, and sex.
14. *Optional*: Click **I'd like to add another child** to enter an additional patient's information.
15. Click **Create My Account**.

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Authenticate Patients Registered Without a PIN

Last Modified on 11/04/2019 7:53 am EST

Overview

When a parent registers a patient on the OP Patient Portal without a PIN, the registration must be authenticated by the practice. The parent will not have full access to all of the portal features until this authentication, or merge matching, is complete. In order for merge matching to be available for the patient, the patient must have a chart in OP.

Workflow

1. Navigate to the Practice Portal Dashboard: **Navigation Panel > Dashboard**.
2. Click **View** in the Self-Registered column of the Patient Portal Statistics panel. The Patient Administration window opens to the Self-Registered patient list.
3. Click the **Select** button in the Actions column or the **patient name** to complete the registration. The Patient Account page is displayed.
4. In the Merge Matching section of the window, click the Merge Matching button. The patient is fully registered for the Patient Portal.

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Remove Access to a Patient Portal Account

Last Modified on 11/04/2019 7:53 am EST

The content below is relevant to the OP Patient Portal, powered by IntelliChart.

Overview

Access to a patient's portal account can be terminated in the OP Practice Portal by removing the association of the parent/guardian.

Workflow

1. Navigate to Patient Administration: **Navigation Panel > Patient Administration**
2. Search for the patient:
 - a. Click the **Account** button in the Search Patients panel.
 - b. Enter the **Last name, First name** or **Date of Birth** of the patient.
 - c. Select a **Search Option** from the Search by drop-down menu.
3. Click the **Select** button in the Actions column or the **Patient Name** to display the Patient Account page.
4. Click **Remove Access** in the Associations panel. A message is displayed to notify you that the Access has been removed. The associated account is listed with a note that access was removed and the date removed. If the access was removed in error select **Undo**.
5. Repeat these steps for each association you would like to remove access.

