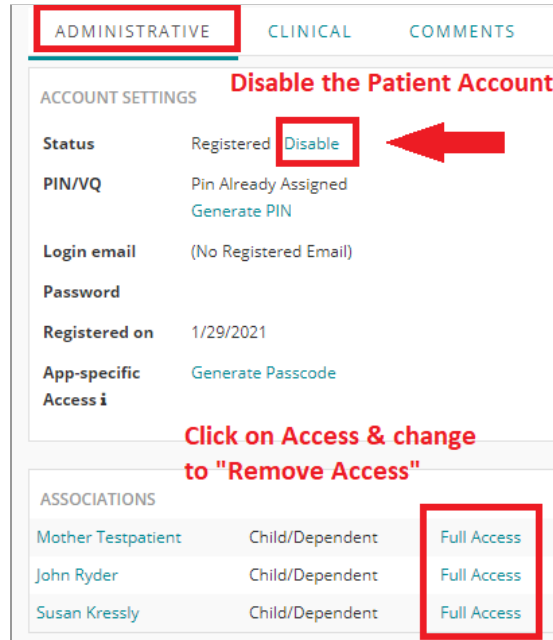


March 29, 2021 Portal Tips & Tricks

Inactivating patients in OP and the IntelliChart Portal

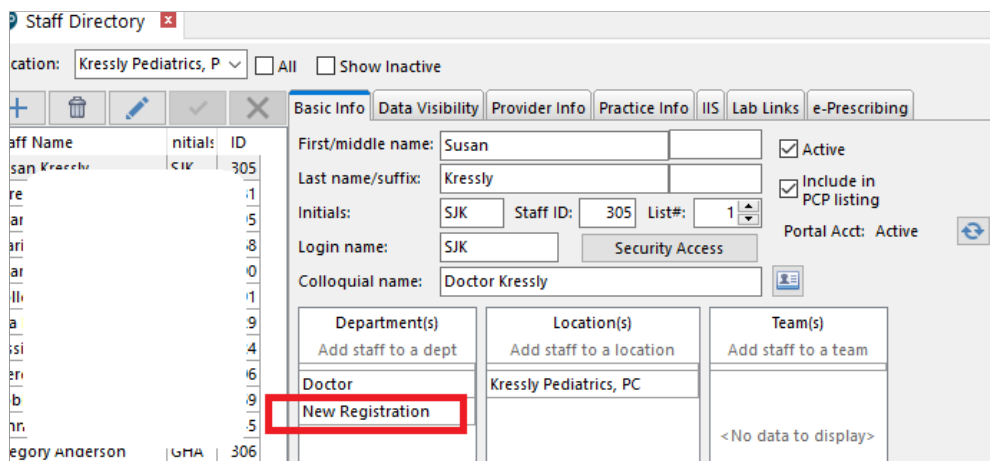
Recommendation: When a patient with an active portal account transfers from your practice, you will want to disable their account in the IntelliChart Practice Portal and remove parental access, if you no longer want them to be able to communicate with you via the portal (**Note:** OP and IntelliChart are exploring the possibility of future read-only access for prior patients). See the screenshot below for instructions on how to disable the account.



The screenshot shows the 'ADMINISTRATIVE' tab of the patient account settings. A red box highlights the 'ADMINISTRATIVE' tab. A red arrow points to the 'Disable' button next to the 'Status' field, which is currently 'Registered'. Below this, a red box highlights the 'Full Access' button for each association listed in the 'ASSOCIATIONS' section. A red text overlay reads: 'Disable the Patient Account' and 'Click on Access & change to "Remove Access"'. The 'ASSOCIATIONS' table lists three associations: 'Mother Testpatient', 'John Ryder', and 'Susan Kressly', all with 'Child/Dependent' roles and 'Full Access' status.

Getting self-registration messages to your practice team

If you have [self-registration](#) turned on for your portal, be sure to add someone in your practice team to the New Registration Department in the OP Staff Directory. This individual will receive a notification that a self-registration has occurred (and if you have been looking for these, look under \$AD for any messages you may have missed.) Additional QRGs for self-registration available [here](#).



The screenshot shows the 'Staff Directory' window. The 'Department' dropdown is set to 'Kressly Pediatrics, P'. The 'Basic Info' tab is selected. The 'First/middle name' is 'Susan', 'Last name/suffix' is 'Kressly', 'Initials' is 'SJK', 'Staff ID' is '305', and 'List#' is '1'. The 'Login name' is 'SJK' and 'Colloquial name' is 'Doctor Kressly'. The 'Department(s)' section has a red box around the 'New Registration' option. The 'Location(s)' section is set to 'Kressly Pediatrics, PC'. The 'Team(s)' section is empty. The 'Active' checkbox is checked, and the 'Portal Acct: Active' status is shown.