

REGISTER A PARENT/GUARDIAN

In order to register a Parent/create an account, the parent/guardian must be added as a Family Contact in OP and have specific fields configured.

NOTES/LINKS



Register a Parent/Create an Account

1. Navigate to the patient's contacts (**Patient Chart > Family Contacts**).
2. **Add** a new Contact or **select** an existing Contact.
3. Confirm or add the following required fields:
 - a. **Home email:** Enter the parent's home email
 - b. *(Optional, based on configuration)* **Cell Phone:** Enter the parent's cell phone number.
 - c. **Authority:** For the parent to have access to the OP Portal, they must have either Joint or Exclusive selected as the Authority.
 - o **NOTE:** If a parent/guardian is also a patient at your practice, the Welcome email will not be sent if their entry in their own Family Contacts is listed "Self" as the Role/Reason. We recommend changing it to "Other Relative".
4. The Welcome Email will be sent automatically once the Authority of Joint or Exclusive has been selected.
 - o The **Portal Status** will show as Active when the parent first logs into the OP Portal.
5. Repeat the process for each patient related to the parent.



Resend the Welcome Email

If a parent needs the Welcome Email resent, navigate to the Patient Chart > Family Contacts, then:

- Adjust the **Authority** level and click **Save**, then the email will be resent.
- OR,
- Click the **folder** button next to the **Email Address** field, then click the **Register** button in the **Caregiver Contact Authority** tab.



Parent Login

The Parent will receive the Welcome Email in their inbox, and click on the link to log in. They must have **their child's/their own DOB**, and set up a new, unique **password** on first login.