Patient Portal Parent Experience: New Patient Registration

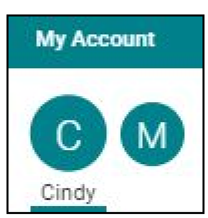
Register as a New Patient / Family on the Patient Portal

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. If prompted, enter the parent/guardian's full address.
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. If the patient's address is different from the parent/guardian, deselect the Use My Address option and enter the patient's address.
17. *(Optional)* Click '**I'd like to add another child**' to enter an additional patient's information.
18. Click **Create My 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**.

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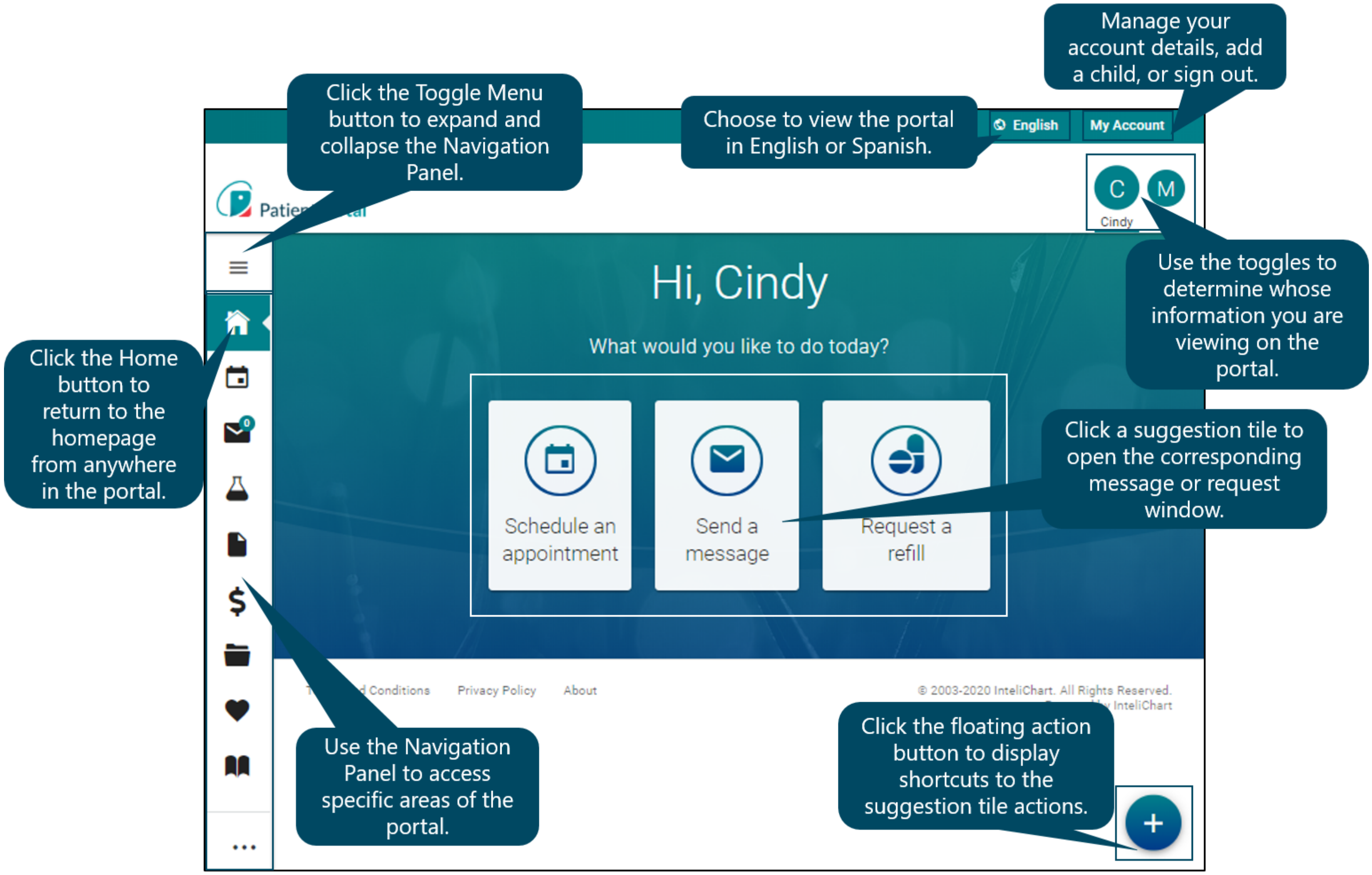
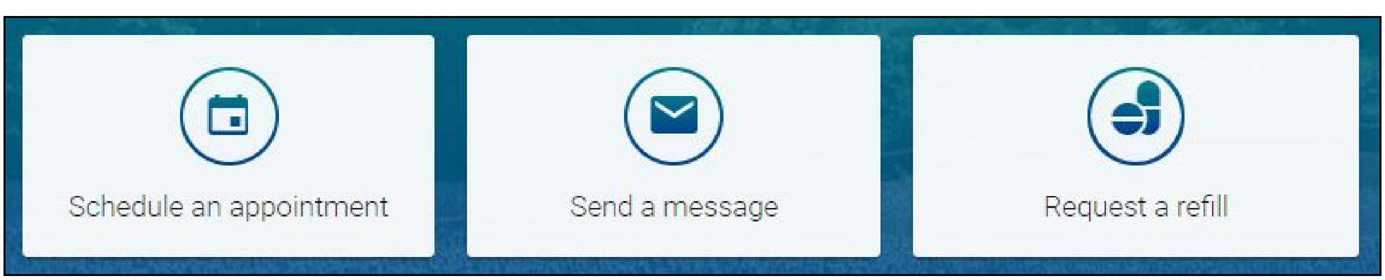
Patient Portal Homepage Navigation



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 features described in this guide may not be available.

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Request / Schedule an Appointment

Please contact the practice to find out their preferred method for requesting and scheduling new appointments.

Send a Message

***Note:** If this feature is not available, contact the practice.*

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

***Note:** If this feature is not available, contact the practice. This requires that the patient's chart has been established by the practice.*

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

***Note:** If this feature is not available, contact the practice.*

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.

Request a Document

Note: *If this feature is not available, contact the practice.*

1. From the patient's homepage, click **My Chart** in the Navigation Panel and select **Documents**.
2. In the Request a Document section of the window, click **Request a Document**.
3. Select **who** the document request is for from the drop-down menu.
4. If prompted, select the **practice** from the drop-down menu.
5. Complete the request information:
    - If a list of Available Documents is displayed:
        a. Select the **document(s)** you would like to request.
        b. Click the **Send Request** button.
    - If a list of Available Documents is not displayed:
        a. Click the **Send a secure message** button.
        b. Complete the fields in the Compose a new message window.
        c. Click the **Send Message** button.

A message is displayed confirming your request or message was sent to the practice.