

# Patient Portal: Getting Started

## Self-Registering on the Patient Portal

Follow the steps below to self-register on the Patient Portal. This process creates a Portal account for the parent or guardian.

1. Navigate to the Patient Portal URL: <https://patientportal.intelichart.com/>, and click the **Create an Account** tab.
2. Enter your **Email Address**, and create a **Password**.
3. Select the **Dependent(s)** radio button.
4. Enter *your* (the parent or guardian's) **Date of Birth**, **Name**, **Gender**, and **Phone Number**.
5. Enter the **Zip Code** of the practice, and select the **Practice** from the drop-down menu.
6. Select a **Security Question** from the drop-down menu and enter a **Security Answer**.
7. Select the **Yes** radio button to add a child or dependent.
8. Agree to the Terms & Conditions, and click the **Continue** button.
9. Enter the child's **information**, leaving the PIN field blank.
10. Click the **Complete** button, and confirm the email address in the Registration Successful window.

Once this process is complete, the practice will authenticate your request making the patient's information available on your Patient Portal account.

## Completing the Patient Portal Registration

Follow the steps below once you have received a Welcome email with PIN and Patient Portal URL.

1. From the welcome email, jot down the PIN that has been assigned to you. This **cannot** be copied and pasted.
2. Click the **Practice Portal URL** to access the Create an Account tab.
3. Confirm the email address, and enter a **password** (at least 8 characters in length).
4. Complete the **Your Personal Information** section with *your* (the parent or guardian's) information.
5. Agree to the Terms & Conditions, and click the **Continue** button.
6. Complete the **Add Child Information** section with the patient's information.
7. If an additional child should be linked, click the **Add Additional Child** button and complete the information for that child. Otherwise, click the **Complete** button.
8. Click the **Confirm** button to confirm your email address or click the **Update Email Address** button to make a change. The portal homepage is displayed.

You can now continue to access the Portal by logging in with your email and password on the Login tab.

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The screenshot shows a patient portal interface with several callout boxes providing instructions:

- Click here to return to your homepage from anywhere in the Portal.** (Points to the Pediatric logo)
- Click these options to see more related information. Count badges indicate when new information is available!** (Points to the Messages widget with a '0' badge)
- Click one of the following options to perform the task.** (Points to the 'What would you like to do?' widget)
- Toggle between parent and child accounts. This determines whose information you are viewing on the Portal.** (Points to the 'C' and 'R' toggle buttons)
- Manage your account details, add a child/dependent, or sign out.** (Points to the 'My Account' link)
- Here you'll find important links provided by the Practice!** (Points to the 'Practice Links' section)
- Use these widgets to see snapshots of information and access these pages.** (Points to the 'Appointments' and 'Medications' widgets)

The interface includes a navigation menu on the left with items: Messages (0), Appointments, Forms, Billing, My Chart, My Health, and Health Education. The main content area features a 'What would you like to do?' section with options: Request an appointment, Refill a medication, Send a message, and Request a referral. Below this are 'Appointments' and 'Medications' widgets, both showing 'No data available in table'. A 'Health Library' widget is on the right with a search bar and a 'SEARCH' button. A 'Customize' button is in the top right corner.

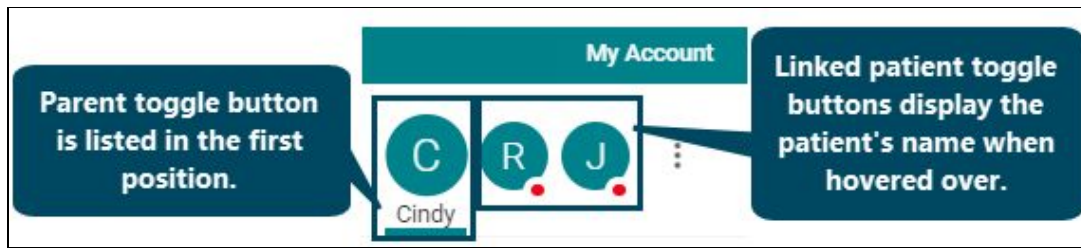
## Patient Portal Tips

- 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.
- Widgets can be removed from the homepage by hovering over the widget and clicking the **Remove** button. They can also be added by clicking the **Customize** button and selecting the **Widget** checkbox(es).

**Please contact the practice with any questions regarding your Patient Portal.**

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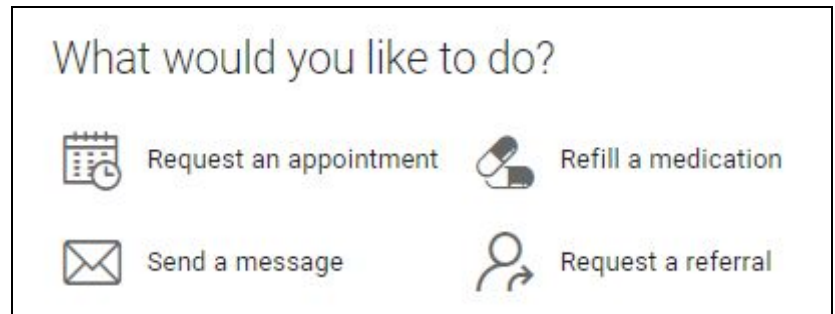
## Patient Toggle Buttons



## Homepage Actions

After selecting the patient's toggle button in the upper right-hand corner of the homepage, click one of the following actions on the homepage to:

- Request an appointment
- Request a medication refill
- Send a message to the practice
- Request a referral



## Requesting an Appointment

1. Click **Request an Appointment** from the patient's homepage or after clicking the **More** button from the Appointments widget.
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. You will receive confirmation from the practice when your request has been processed.

## Requesting a Medication Refill

1. From the patient's homepage, click **Refill a Medication**.
2. Review the message, and click the **Continue** button.
3. Select the **Patient**, **Medication**, and **Request Group** from the drop-down menus.


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4. Select or add the **Pharmacy** you want the prescription to be sent to. If you are adding a new pharmacy, click the **Close to Refill** button to return to the Refill window.
5. Click the **Submit** button. A message is displayed confirming your request was sent to the practice.

## Sending a Message to the Practice

1. From the patient's homepage, click **Send a message**.
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**.
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.



**Note:** If an attachment is necessary, click  to select an attachment to add to the message.

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.

## Requesting a Referral

1. Click **Request a referral** from the patient's homepage,
2. Select **who** the referral is for from the drop-down menu.
3. Select the **practice** from the drop-down menu, and click the **Continue** button.
4. Review the **Request a Referral** message, and click the **Continue** button.
5. Select the **practice location** from the drop-down menu.
6. Select **who** the request is being sent to from the Recipient Group field.
7. Enter the **Reason** for the request.
8. Enter your preferred **Schedule Availability**.

**Note:** This is available in the event the practice manages the scheduling of the specialist appointment.

9. Click the **Send Referral Request** button. A message is displayed at the top of the window confirming your request was sent to the practice.

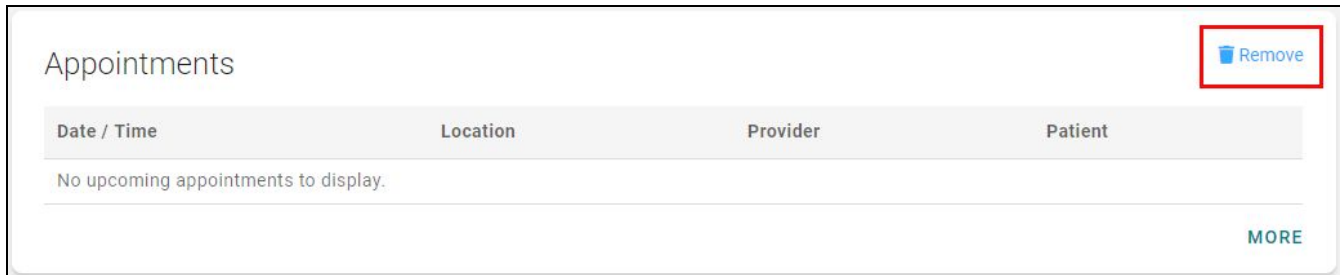
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## Customizing Your Homepage

Each patient's homepage displays widgets, such as Appointments, Medications, Health Library, etc. that can be added or removed from the homepage. Each widget contains a More button that can be clicked to display more information for the specific widget. You can return to the homepage by clicking the logo in the upper left-hand corner of the window.


### Removing a Widget

1. Hover over the **Widget** that you would like to remove. The **Remove** button is displayed.



2. Click the **Remove** button. The Widget is removed from the homepage. It can be added back by following the instructions below to add a Widget.

### Adding a Widget

1. Click  located in the upper right-hand corner of the window. The **Add widgets to my homepage** window is displayed.
2. Select the **Checkbox(es)** for the Widgets you would like to add to the homepage.  
**Note:** The list of available Widgets is generic. Not all Widgets may be available for your particular practice. For questions about what Widgets are available, contact the practice directly.
3. Click the **Install Selected Widgets** button to save your changes. The homepage is updated with your Widgets.