Getting Started with the Patient Portal

A quick reference guide

Welcome to the new Patient Portal!

This quick reference guide covers how to:

- Complete your portal registration from your welcome email
- Navigate the portal and switch between parent and child accounts
- Request and view appointments
- Request medication refills
- View medical records and results
- View and request documents/forms and complete surveys
- Send a message to the practice
- Pay your bill

For questions or to confirm the availability of these features, reach out to the practice.

Complete Your Portal Registration

You'll receive a welcome email to your email address on file with the practice. Complete these steps from that email.

1. Click the Sign Up button in the email.
2. Enter your date of birth or your child's date of birth and create a password. The password must have a minimum of 8 characters and include an uppercase letter, a number, and a special character.
3. Click Sign Up. You'll be returned to the login screen.
4. Enter your email and the password you just created. A pop-up will open asking you to accept the Terms and Conditions.
5. Review and agree to each by selecting the checkbox next to 'I agree'.
6. Click Continue.

Your registration is complete! You're taken directly to your new portal account.

Navigate Your Account

When you log into your portal account, you're logged in as you, the parent or guardian. Your homepage will include a widget that lists your associated child portal account(s). The following options can be used from your account without switching to the child account:

- **Appointments**: If you have more than one child linked to your account, you'll be able to select the child during the request.
- **Messaging**: You'll be prompted to select which child the message is on behalf of during the message creation.
- **Refill Requests**: Like Messaging, you'll be prompted to select which child the medication refill is being requested for.
- **Billing**: You'll be able to see billing information for your entire family.

Switch to a Child's Account

Some areas of the portal require you to switch to your child's account to view and manage their specific information. These areas include Medical Records, Medications, Documents, and Labs. There are two ways to switch from your account to your child's:

- Click your profile in the left navigation, then Switch Account and select the child whose profile you want to view.
- In the People I Manage widget, click the Switch button next to the child's name.

Request and View Appointments

Make an Appointment Request

If the practice has enabled this feature, appointments can be requested from your parent account or from your child's account. These steps cover how to request an appointment from your account.

1. Click New Appointment on your homepage (if displayed) or select Appointments in the navigation panel on the left of the screen.
2. Complete the fields in the Appointment Request screen using the drop-downs. While only some fields are required, all of the information is helpful for the practice staff receiving the request. Also, make sure you select the correct child for the request.
3. Complete the Reason for the Appointment field. Try to be specific and include details you'd share if you were making an appointment over the phone.
4. In the Availability section, click the calendar icon to select your preferred appointment date range. Then, use the checkboxes to further specify your availability.
5. Click Submit. Your request will display in the Appointments section of the portal with a status of *Pending Confirmation*. You will also get a notification at the bottom of the screen stating that the request was submitted successfully.

View Appointments

Appointments can be viewed from your account for all child accounts or you can view them individually by switching to your child's account. Note that if you switch to a child account, you will only be able to see *that* child's appointments. There are two ways to view appointments from your parent account:

- In the Appointments widget (if applicable). From the widget, you can click View All to see the full list of appointments.
- By clicking Appointments in the navigation panel on the left of the screen.

Once you're viewing the Appointments list, you can filter and search.

- **Upcoming**: Shows only upcoming appointments
- **All**: Displays the complete appointment history
- **Appointment Status**: Displays only appointments with the selected status
- **Patient**: Displays only appointments for the selected child
- **Location**: Displays only appointments at the selected location
- **Clear filters**: Resets the selected filters

Request Medication Refills

If the practice has enabled this feature, you will be able to request refills for current medications your child is prescribed. These steps below cover how to request a refill from your account.

1. Click Request in the Prescriptions widget on your homepage (if displayed) or select Refill Requests in the navigation panel on the left of the screen, then Request in the top right hand corner.
2. Complete the fields in the New Refill Request screen. If you need to request more than one refill, click Add New and add the details of the other medication(s).
3. Click Request. Your request will display with a status of Pending Confirmation.

View Medical Records and Results

To view Medical Records and Lab Results for your child, you need to switch to the child's portal account. Both of these items are housed under Medical Records in the left navigation panel, or from the Medical Records widget on the child's homepage (if displayed). Results can also be found within Results in the left navigation panel.

View Medical Records

The items shown in Medical Records and their order are determined by the practice. In general, the Medical Records section of the portal includes Labs, Results Documents, Health Summaries, Wellness Tracker (Vitals and Growth Measurements), and Documents (like visit summaries and prescriptions). The sidebar on the right side of the screen displays Conditions, Allergies, Family History, Immunization Records, Medications, and Social History, with a number of records for each item. You can click each of the sidebar items or View All in the widgets to go to more details and specifics.

View Results

While Results can be found under Medical Records, they're also accessible from Results in the left navigation panel. In addition to the actual result range, where outlier values are indicated in red, Result Documents (if applicable) are also available.

View and Request Documents/Forms

To view your child's documents or request a document/form from the practice, you need to switch to the child's portal account.

View Patient Documents

Documents sent to the portal include visit summaries, prescriptions (if printed), school/camp forms, or any other document that the practice chooses to send. You'll also find documents or forms you have requested from the practice under Documents, located:

- In the Documents widget (if applicable) on your homepage.
- By clicking Documents in the navigation panel on the left of the screen.

PDF documents can be previewed by clicking on the document listing. All other document types must be downloaded to view by clicking the download button from within the document view.

Request a Document/Form

You can request a document/form like a school/camp form or a referral for your child from the child's portal account by:

- Clicking the Request a Document widget, if available.
- Going to Forms in the left navigation panel and then clicking Request Document Form.

After selecting the form(s) you'd like to request, click Submit to send the request to the office.

Complete Surveys

Surveys sent by the practice will come to the portal as a Message. The message will contain a PIN code and a link to complete the survey. Follow these steps to complete surveys:

1. Copy the PIN code from the message.
2. Click the survey link.
3. Paste the PIN.
4. Complete the survey as directed.
5. If there were additional surveys sent to you, click the link that says"Additional surveys are ready for you. Tap or click the link to complete them now".
6. The Pending Surveys window opens. Click Open and complete additional surveys as directed.

Send a Message to the Practice

Messages can be sent to the practice if they have enabled this option. Messages can be accessed from your parent account and from your child's account. You'll be able to see all messages, sent and received, under Messages. Please note that all messages will be visible to any individual who has access to the child's portal account.

If you choose to send a message without switching from your account to your child's account, make sure you select the child in the From field. To send a message:

1. Click Messages.
2. Click New Message.
3. Fill out the required fields and add attachments, if applicable, by clicking the Add File button.
4. Click Submit. Your message will display in the Sent tab of Messages.

Pay Your Bill

If the practice has chosen to enable Bill Pay, you can make a payment from your parent account or from the child's account. From Billing in the navigation panel, you can:

- View the balance for an individual child
- View the current total family balance
- View past payments accessible by clicking Payment Logs at the top of the screen
- Make payments on a specific child's balance or total family balance

To make a payment:

1. Click Billing in the left navigation panel.
2. Click Pay Now.
3. In the Amount to Pay field, enter the amount you're paying.
4. Click Pay Now.
5. In the Payment window, type in your card number and submit the payment.

Reach out to the practice if you have any questions as you become familiar with the new portal!