Patient Registration

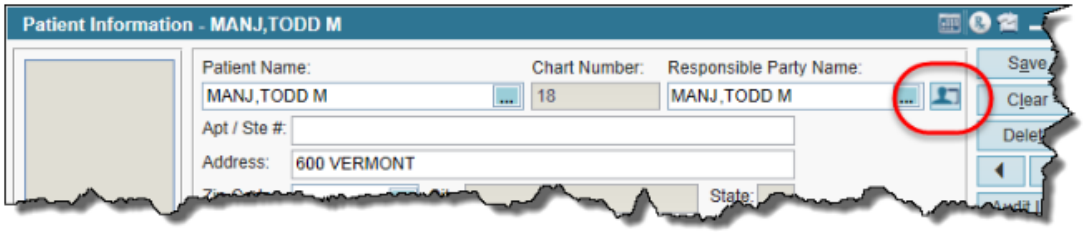
Andrew Smith - 2015-10-23 - AMD Patient Portal

Patient Portal: Patient Registration

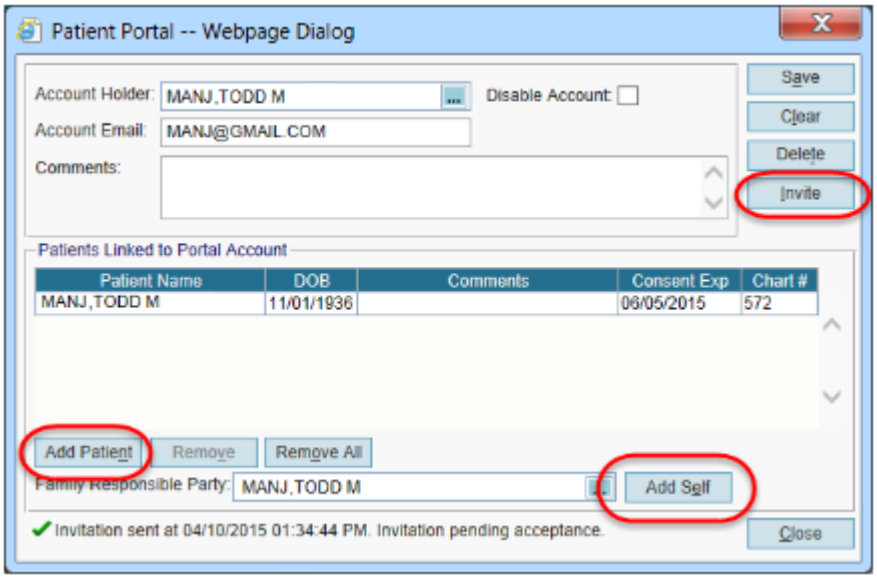
There are 2 ways to register patients for the patient portal in AdvancedMD. **This is the normal registration method which will send the patient an e-mail containing a link to register them for the portal.**

Patients who use the patient portal must have an email address, and be set up as an account holder.

To set up a patient in the portal, click the patient icon and select the patient.



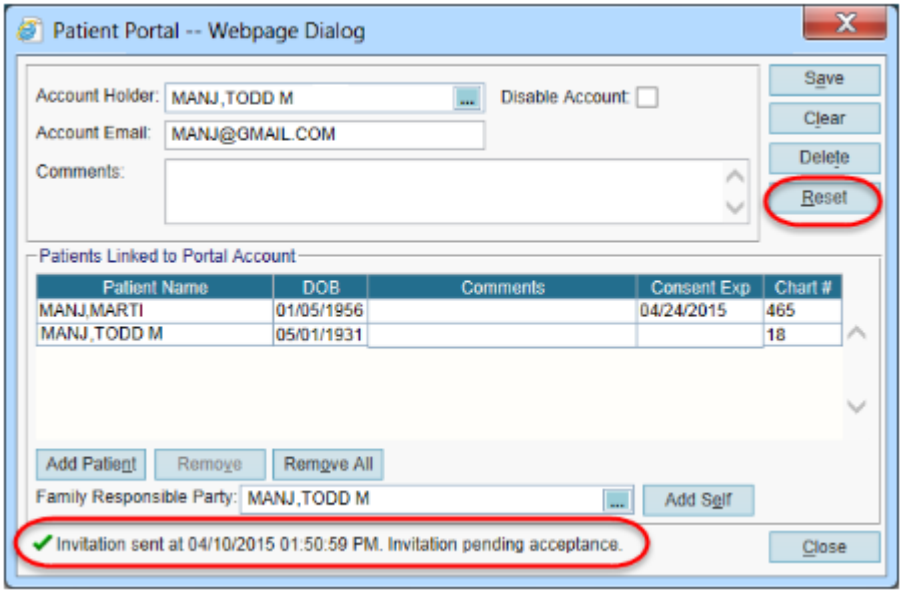
1. Click the **Patient Portal** icon, the **Patient Portal** dialog displays and shows the selected patient as the **Account Holder**.
2. Enter the email for the patient **Account Holder**, and any **Comments** needed.
3. Click **Add Self**. The **Account Holder** patient is now linked to the account and displays in the **Patients Linked to Portal Account** grid.
4. Click **Invite**. An **Invitation sent** message displays at the bottom of the **Patient Portal** dialog.



The patient **Account Holder** has 30-days to respond to the initial portal invitation email and activate the account. If the account holder fails to accept the invitation within the initial 30-day window, you can send a new invitation and indicate how many days the account holder has to accept the new invitation. (e.g., 30 days, 20 days)

1. Double-click on the account holder name in the **Patients Linked to Portal Account** grid. The **Add Portal Account Patient** dialog displays.

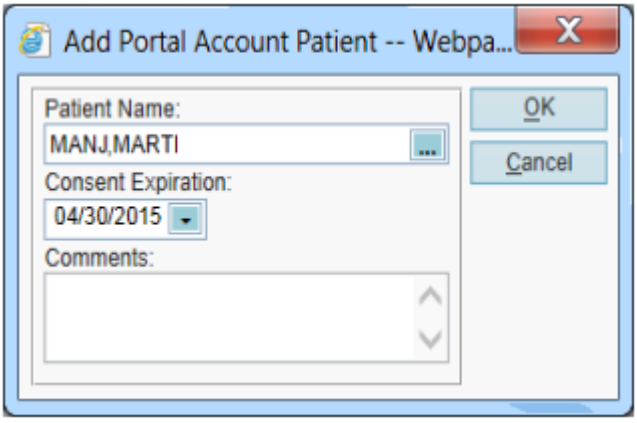
2. Enter the date the new invitation will expire in the **Consent Expiration** field, and any **Comments** as needed.
3. Click **OK**. The **Invite** button changes to a **Reset** button. An **Invitation sent** message displays at the bottom of the **Patient Portal** screen.



Note: You can click the **Reset** button to cancel the account password and resend the invitation at any time during the initial 30-day window. An **Invitation sent** message displays at the bottom of the dialog telling you the date and time the new invitation was sent.

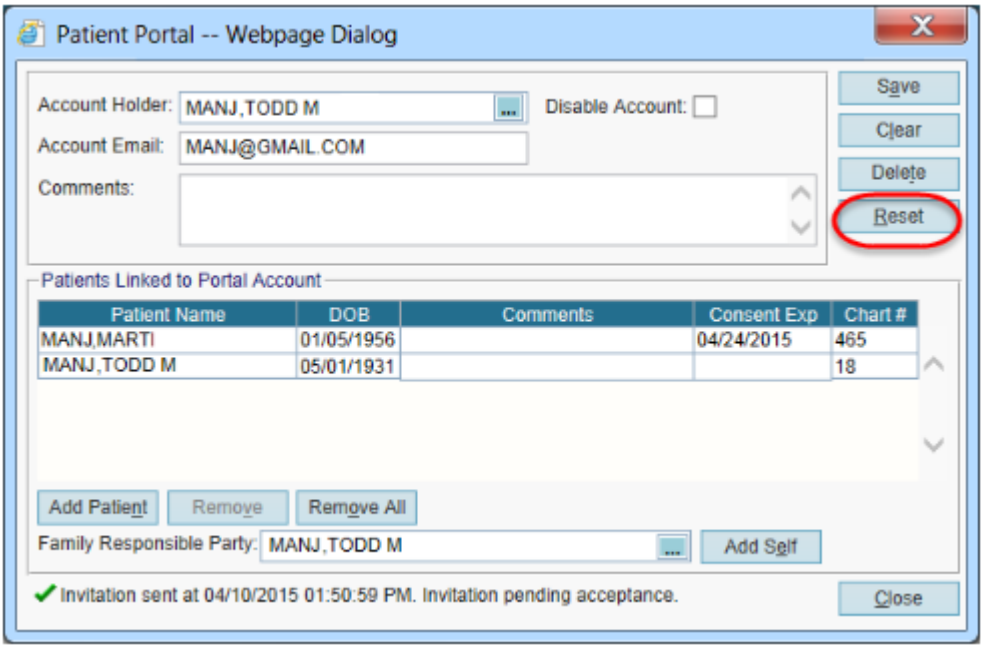
Adding Additional Patients to the Patient Portal Account

1. To associate another patient with a patient portal account, click the **Add Patient** button. The **Add Portal Account Patient** dialog displays.



1. Enter **Patient Name**, or search for the patient by selecting the ellipsis.
2. Enter a date in the **Consent Expiration** field that indicates how many days the account holder has to accept the invitation. (e.g., 30 days, 20 days) before the invitation expires.
3. Enter any Comments, if applicable.

1. Click **OK**. The **Invite** button changes to a **Reset** button.
2. Click **Invite**. An **Invitation sent** message displays at the bottom of the dialog.



Note: If a patient on the account misses the consent expiration window, you can update the **Consent Expiration** field to indicate how many days the account holder has to accept the invitation. (e.g., 30 days, 20 days) before the invitation expires. Click the **Reset** button to resend the invitation.

Important Notes:

- The Patients Linked to the Portal Account grid controls whose patient chart information the Account Holder can view in the Patient Portal (i.e., the Account Holder can view chart information for all patients displayed in grid)
- The Family Responsible Party field determines which patient accounts the Account Holder can make payments to through the Patient Portal (i.e., the Account Holder can make payments to any patient account tied to the responsible party listed in the Family Responsible Party field)