



## Patient Registration

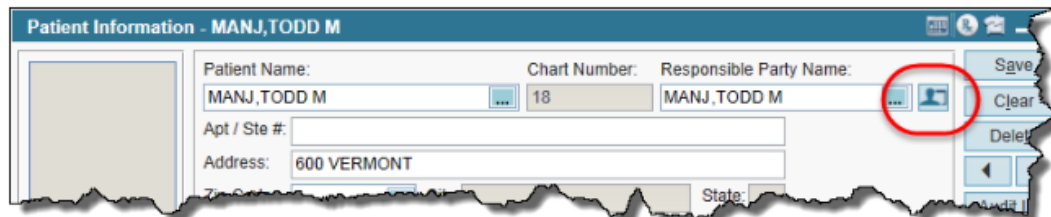
Andrew Smith - 2015-10-23 - AMD Patient Portal

### 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.



Patient Information - MANJ, TODD M

Patient Name:	Chart Number:	Responsible Party Name:	Save
MANJ, TODD M	18	MANJ, TODD M	Clear
Apt / Ste #:			Delete
Address:	600 VERMONT		
City:	State:		

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.

Patient Portal -- Webpage Dialog

Account Holder: MANJ,TODD M Disable Account: ☐

Account Email: MANJ@GMAIL.COM

Comments:

Save Clear Delete **Invite**

Patients Linked to Portal Account

Patient Name	DOB	Comments	Consent Exp	Chart #
MANJ,TODD M	11/01/1936		06/05/2015	572

Add Patient Remove Remove All

Family Responsible Party: MANJ,TODD M Add Self

✓ Invitation sent at 04/10/2015 01:34:44 PM. Invitation pending acceptance.

Close

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.

Patient Portal -- Webpage Dialog

Account Holder: MANJ,TODD M Disable Account: ☐

Account Email: MANJ@GMAIL.COM

Comments:

Save Clear Delete **Reset**

Patients Linked to Portal Account

Patient Name	DOB	Comments	Consent Exp	Chart #
MANJ,MARTI	01/05/1956		04/24/2015	465
MANJ,TODD M	05/01/1931			18

Add Patient Remove Remove All

Family Responsible Party: MANJ,TODD M Add Self

✓ Invitation sent at 04/10/2015 01:50:59 PM. Invitation pending acceptance.

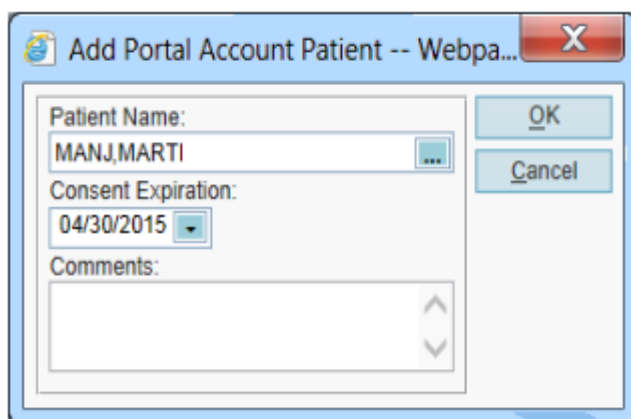
Close

**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

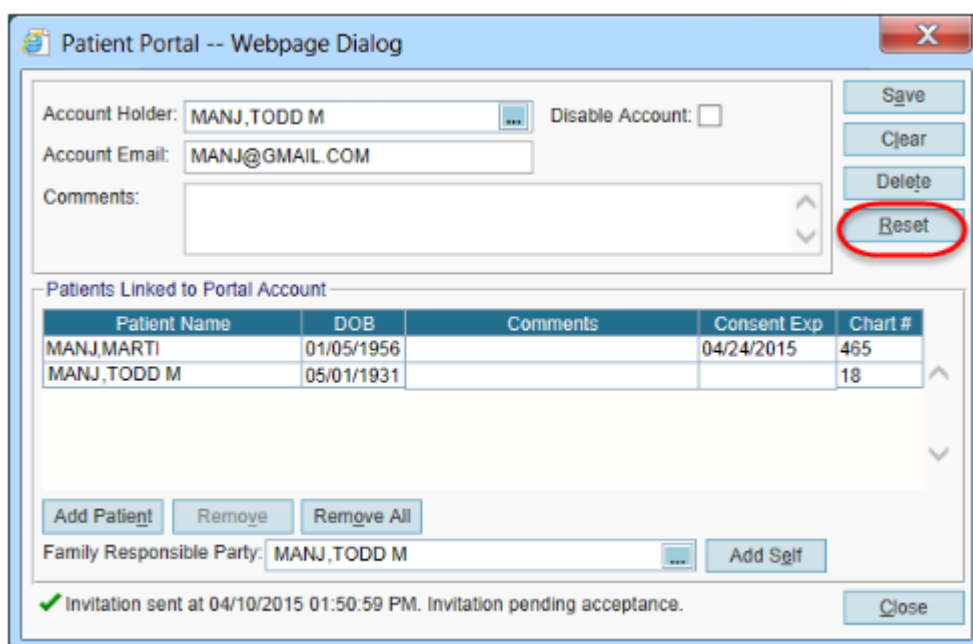
1. To associate another patient with a patient portal account, click the **Add Patient** button. The **Add Portal Account Patient** dialog displays.



The dialog box is titled "Add Portal Account Patient -- Webpa...". It contains the following fields and controls:

- Patient Name:** A text field containing "MANJ,MARTI" with a search icon (three dots) to its right.
- Consent Expiration:** A date picker field showing "04/30/2015".
- Comments:** A multi-line text area.
- Buttons:** "OK" and "Cancel" buttons are located on the right side.

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.



The dialog box is titled "Patient Portal -- Webpage Dialog". It contains the following fields and controls:

- Account Holder:** A text field containing "MANJ,TODD M" with a search icon (three dots) to its right.
- Account Email:** A text field containing "MANJ@GMAIL.COM".
- Comments:** A multi-line text area.
- Buttons:** "Save", "Clear", "Delete", and "Reset" (circled in red) are located on the right side.
- Disable Account:** A checkbox.
- Patients Linked to Portal Account:** A table with the following data:

Patient Name	DOB	Comments	Consent Exp	Chart #
MANJ,MARTI	01/05/1956		04/24/2015	465
MANJ,TODD M	05/01/1931			18
- Buttons:** "Add Patient", "Remove", and "Remove All" are located below the table.
- Family Responsible Party:** A text field containing "MANJ,TODD M" with a search icon (three dots) to its right.
- Buttons:** "Add Self" is located to the right of the Family Responsible Party field.
- Status Message:** A green checkmark icon followed by the text "Invitation sent at 04/10/2015 01:50:59 PM. Invitation pending acceptance."
- Buttons:** "Close" is located at the bottom right.

**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)