

**Important Content Update Message**

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About.**

OP Patient Portal: Parent Toolkit

Last Modified on 11/20/2020 3:51 pm EST



OP Patient Portal: Parent Toolkit

This toolkit has everything your parents need to set up and use their Patient Portal accounts!

i Important Notes About the Content of this Page

Sharing of OP Help Center articles with parents is strongly discouraged. Refer to the **sharing instructions** in each section below to learn how to share the content outside of the practice. Also, the content of these resources is subject to change. We recommend that you take note of the **Last Updated** date for each resource to ensure that you are providing your parents with the most up-to-date resources and make adjustments, as needed.

📺 Videos: Short videos to introduce the Patient Portal and provide direction to parents.

Sharing Instructions: Click the **Video Name** to go to the Video article. From the Video article, right-click on the video thumbnail and select **Copy video URL**. This YouTube Video link can be pasted (or hyperlinked) on your practice website, social media, or other platform.

Video Name	Video Use / Contents
<p>OP Patient Portal Parent Experience: Patient Portal (English) Video <i>Last updated on 8/31/2020; new Youtube URL available!</i></p>	<p>Intended for: Parents new to the OP Patient Portal, powered by IntelliChart. Contents: Portal navigation, instructions for completing registration from a Welcome Email, and instructions for sending a portal message and scheduling an appointment.</p>
<p>OP Patient Portal Parent Experience: Patient Portal (Spanish) Video <i>Last updated on 9/28/2020</i></p>	<p>Intended for: Parents new to the OP Patient Portal, powered by IntelliChart. Contents: Portal navigation, instructions for completing registration from a Welcome Email, and instructions for sending a portal message and scheduling an appointment in Spanish.</p>



Quick Reference Guides (QRGs): Brief PDFs of how-to steps to help your parents navigate and use the portal.

Sharing Instructions: Click the **QRG Name** to go to the QRG article. From the QRG article, click **Click here** to open the PDF and proceed with the following sharing options:

- **Print the PDF:** Click the **Print** icon in the upper right-hand corner of the PDF window. When printing, we recommend that you set the Scale of the document to "Fit to printable area". This will ensure the best print quality based on your individual printer setup.
- **Share the PDF:** Click the **Download** icon in the upper right-hand corner of the PDF window. To share this PDF electronically, we recommend that you first download it to your local PC and then use that download to hyperlink or load to your practice website, social media, or other platform.

QRG Name	QRG Use / Contents
<p>OP Patient Portal Parent Experience: Complete Registration with a PIN QRG (English) <i>Last updated on 8/18/2020</i></p>	<p>Intended for: Parents who are issued Patient Portal Registration PINs via the Easy button in OP or via the IntelliChart Practice Portal.</p> <p>Contents: Steps for completing portal registration (with or without a Welcome email) and basic Patient Portal navigation.</p>
<p>OP Patient Portal Parent Experience: Complete Registration with a PIN QRG (Spanish) <i>Last updated on 9/28/2020</i></p>	<p>Intended for: Parents who are issued Patient Portal Registration PINs via the Easy button in OP or via the IntelliChart Practice Portal.</p> <p>Contents: Steps for completing portal registration (with or without a Welcome email) and basic Patient Portal navigation, in Spanish.</p>
<p>OP Patient Portal Parent Experience: New Patient Registration (without a PIN) QRG (English) Use only when Self-Registration is enabled <i>Last updated on 8/18/2020</i></p>	<p>Intended for: Parents of patients who are not yet established patients of the practice.</p> <p>Not intended for: Families who are already registered for the portal that are adding a new patient to the practice. The parent should be instructed to add the patient via PIN entry directly from the Patient Portal, under My Account.</p> <p>Contents: Steps for registering for the practice via the Patient Portal and basic Patient Portal navigation.</p>
<p>OP Patient Portal Parent Experience: New Patient Registration (without a PIN) QRG (Spanish) <i>Last updated on 9/29/2020</i></p>	<p>Intended for: Parents of patients who are not yet established patients of the practice.</p> <p>Not intended for: Families who are already registered for the portal that are adding a new patient to the practice. The parent should be instructed to add the patient via PIN entry directly from the Patient Portal, under My Account.</p> <p>Contents: Steps for registering for the practice via the Patient Portal and basic Patient Portal navigation, in Spanish.</p>

<p>OP Patient Portal Parent Experience: Schedule an Appointment QRG <i>Last updated on 11/20/2020</i></p>	<p>Intended for: Practices that have either Appointment Requests or Live Scheduling configured for their parents to request or schedule appointments from the Patient Portal.</p> <p>Contents: Steps a parent will take to request or schedule and appointment from the Patient Portal.</p>
<p>OP Patient Portal Parent Experience: Bill Pay QRG Use only when Bill Pay is enabled <i>Last updated on 8/28/2020</i></p>	<p>Intended for: Parents who would like to make payments toward their patient balance from within the Patient Portal.</p> <p>Contents: A snapshot of the Bill Pay section of the portal and steps for making a payment.</p>
<p>OP Patient Portal Parent Experience: Request a PIN & Complete Portal Registration Use only when Bulk PIN is requested</p>	<p>Intended for: Practices that are using the Bulk PIN process. There are several steps that must be taken to request Bulk PIN for your practice prior to distributing this guide to parents.</p> <p>Contents: Steps a parent will take to set up their portal account after receiving a registration email prompted by the Bulk PIN process, and basic Patient Portal navigation.</p>