PORTAL

ACCOUNT SETUP

STEP 01
REQUEST PIN

From the email you received, click **SETUP MY ACCOUNT**. Then, choose how you want to receive the PIN. *Text is recommended.*

-

Note: *If you received emails for additional children who are patients of the Practice, you need to do this from **each** email. Each patient needs to be assigned a unique PIN.*

-

Proceed when you've received the PIN(s).

STEP 02
CONFIRM

Click **START MY REGISTRATION from one browser tab** and close the additional tabs. Enter your Email Address, create a Password, and click **CONTINUE**. *Only do this once. If you have multiple PINs, you'll add them next.*

-

Click **Yes** because you have a PIN and click **Child or Dependent** (unless you are the patient and you're registering yourself for the portal.)

STEP 03
CHILD/DEPENDENT INFO

*If you picked **Myself** in the previous step, proceed by entering your info.*

Otherwise, enter the child's or dependent's **birthday** and **PIN**. Refer back to the text you received with the PIN. If you received PINs for additional patients, click **+Add another child or dependent** and complete their information. Click **CONTINUE** when you're done.

STEP 04
PARENT/GUARDIAN INFO

Complete all of the fields with your information, select a **Security Question**, and provide the **Answer**. Then, review the **Terms & Conditions** and confirm that you did so by selecting the checkbox. Click **CREATE MY ACCOUNT** when you're done.
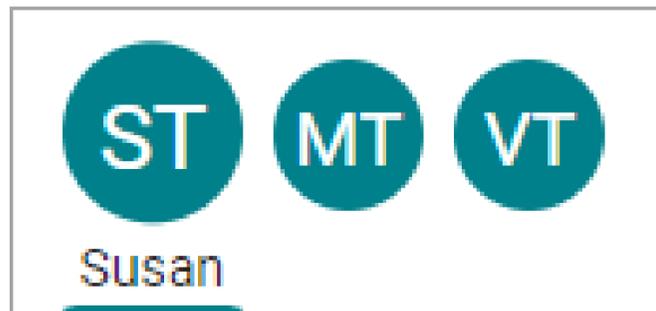
You're all set!

Note: *These steps should **only** be taken if you **do not** already have a portal account established with the Practice.*

🖱 ACCOUNT TOGGLES

These toggles drive whose info is displayed. The parent/guardian toggle button is first followed by toggles for each linked patient. Be sure to select the correct toggle when viewing patient info.

ST **MT** **VT**

Susan

🖱 SUGGESTION TILES

Use these quick access buttons to initiate the most common portal actions. The tiles displayed depend on what the Practice has enabled. Note that when sending a message to the Practice, always select that it is being sent **on behalf of the patient**. Otherwise, it may not be received.
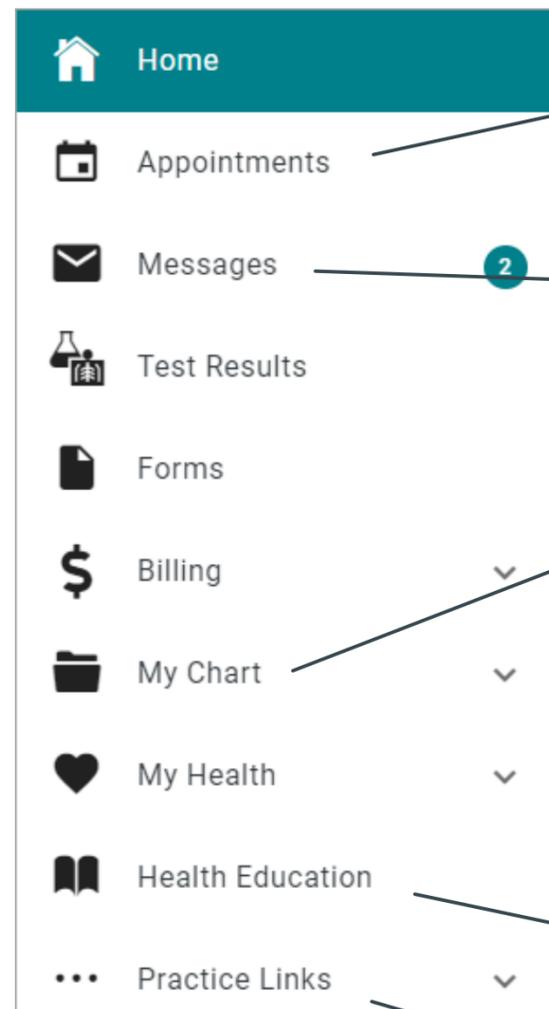
📅 Schedule an appointment | ✉ Send a message | Request a refill
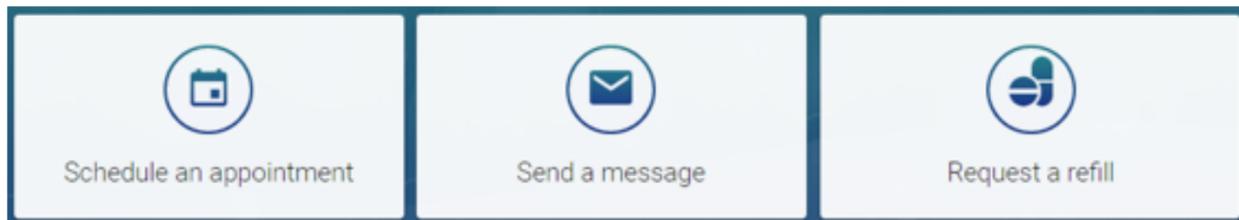
Shortcuts replace the Suggestion Tiles when you've received items that need attention, such as to read new messages or view lab results.

🖱 NAVIGATION PANEL

Use the Navigation Panel to access the patient's full portal information. Remember to select the correct toggle button first to make sure the information displayed is that of the intended patient.

🏠 Home
📅 Appointments
✉ Messages 2
🧪 Test Results
📄 Forms
$ Billing ⌄
📁 My Chart ⌄
♥ My Health ⌄
📖 Health Education
••• Practice Links ⌄

Lists upcoming appointments and provides the options to **request a new appointment** or **request a referral** (if enabled by the Practice).

Displays the patient's message inbox, sent items, and deleted messages. You can also compose a message from here.

Expands to list the different chart sections. Here are some key points:
- **Summary** displays the entire chart at-a-glance and features tabs to move to specific chart sections.
- **Documents** provides the option to request a document (if enabled by the Practice). You can also see what has been shared by the Practice for you to review.

Displays Patient Education handouts shared by the patient's Care Team.

Easy access to important links provided by the Practice.

Note: *Feature availability is determined by the Practice. If you have any trouble or questions as you're creating your portal account or navigating around, please contact the Practice.*