

Patient Portal: Email Enrollment Notification

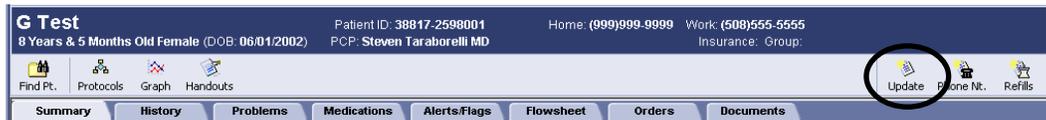
This process replaces the PIN Welcome Letter.

Step 1. Verify an active PIN exists for the patient.

(If expired, see handout **Patient Portal: Regenerating an Expired PIN.**)

Step 2. Generate the Email Enrollment Notification by completing the following:

From the patient chart; start an Update by clicking the Update button

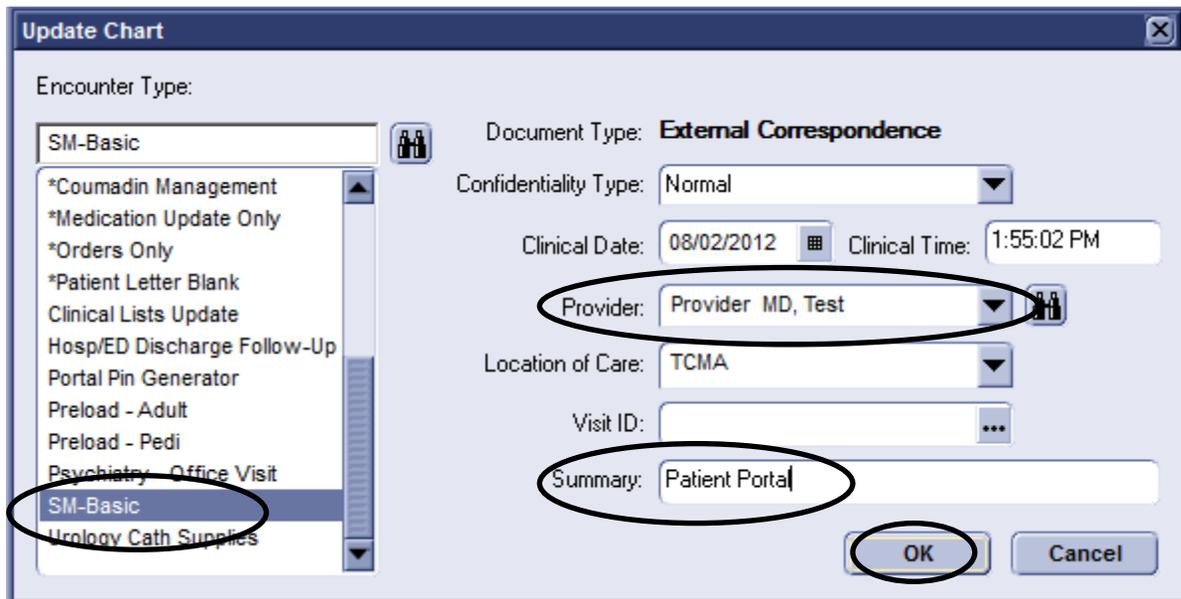


Choose Encounter Type: SM-Basic

Change the provider to the PCP or for Specialist offices change to the responsible provider for the patient.
(Would not be the PCP if the PIN was generated in a TCMA Specialist office.)

Add the Summary: Patient Portal

Click OK.



The SM-Basic form will display with the patient's email address populated in the To field. The Subject field will contain the text added to the Summary field when the Update was started.

Both the To and Subject fields should be completed. If blank when the form displays; enter the patient's email address in NextGen and add Patient Portal to the Subject field on the SM-Basic form.



The screenshot shows the 'SM-Basic: Bob Test' form. The 'To:' field is populated with 'maurentest@gmail.com' and the 'Subject:' field is populated with 'Patient Portal'. Both fields are circled in black. The 'Message:' field is currently empty.

In the Message field;

For Individual Portal Accounts, type .PIN (case sensitive) and then click Enter on your keyboard.

(For Family Portal Accounts; if the primary account holder is also a patient they will need to complete the instructions for an Individual Portal Account before adding family members.)



The screenshot shows the 'SM-Basic: Bob Test' form. The 'Message:' field now contains '.PIN' and is circled in black. The other fields remain the same as in the previous screenshot.

Portal registration instructions will display, including the patient's PIN.

Click Close.



The screenshot shows the 'SM-Basic: Bob Test' form. The 'Message:' field is now populated with the following text: 'To complete your portal registration: 1. Copy your PIN number below 2. Click on 'Verify My Identity' at the top of this screen 3. Select 'I have received a PIN' 4. Enter your verification criteria as required 5. Select Method of Contact then Submit Your PIN is B274000129 This one-time access code is valid for 30 days. Thank you for registering on our portal.' The entire message area is circled in black. At the bottom right, the 'Close' button is also circled in black. At the bottom left, there are buttons for 'Prev Form (Ctrl+PgUp)' and 'Next Form (Ctrl+PgDn)', and checkboxes for 'Reply to Chart' and 'Attach CCD'.

For Family Portal Accounts, type .PINF (case sensitive) and then click Enter on your keyboard.

(If the primary account holder is not a patient these instructions are all that is needed. If they are a patient generate the email enrollment notification for Individual Portal Accounts for the primary account holder.)



SM-Basic: Bob Test

To: maurentest@gmail.com

CC:

BCC:

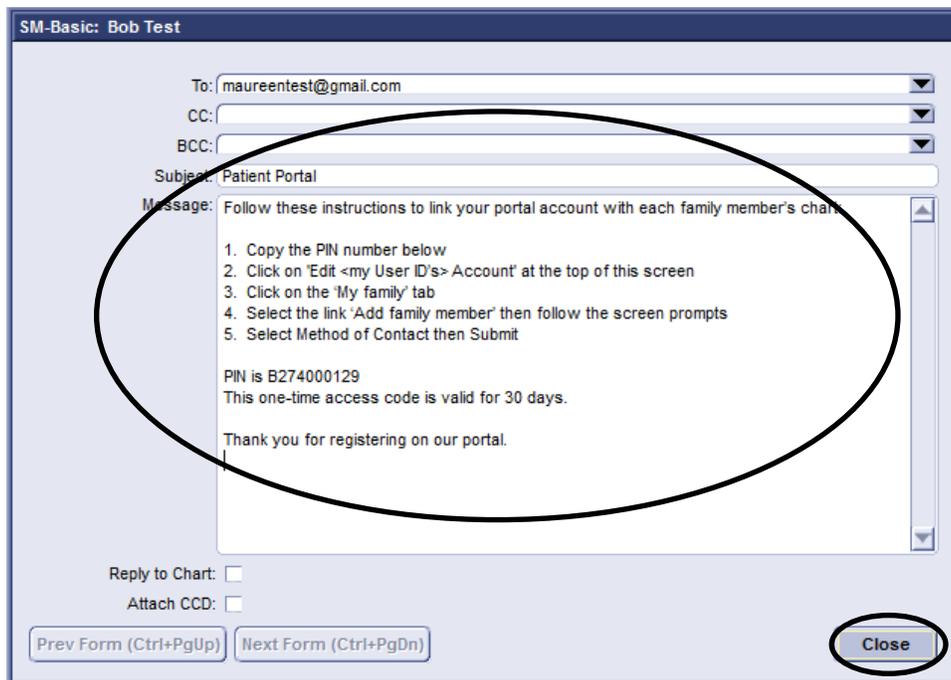
Subject: Patient Portal

Message: .PINF

Portal registration instructions will display, including the patient's PIN.

An email enrollment notification should be generated for each family member that will be added to the Family Portal Account, utilizing the .PINF quick text.

Click Close .



SM-Basic: Bob Test

To: maurentest@gmail.com

CC:

BCC:

Subject: Patient Portal

Message: Follow these instructions to link your portal account with each family member's chart.

1. Copy the PIN number below
2. Click on 'Edit <my User ID's> Account' at the top of this screen
3. Click on the 'My family' tab
4. Select the link 'Add family member' then follow the screen prompts
5. Select Method of Contact then Submit

PIN is B274000129
This one-time access code is valid for 30 days.

Thank you for registering on our portal.

Reply to Chart:

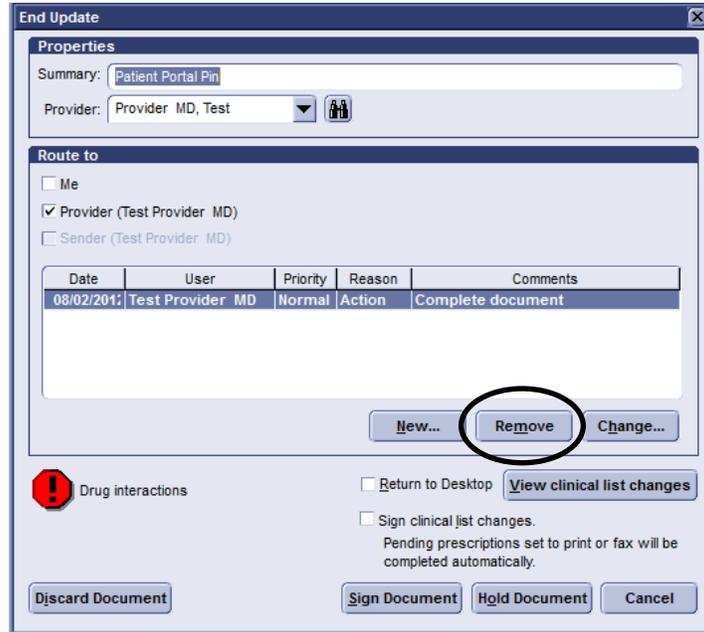
Attach CCD:

Prev Form (Ctrl+PgUp) Next Form (Ctrl+PgDn) Close

Click End Update.

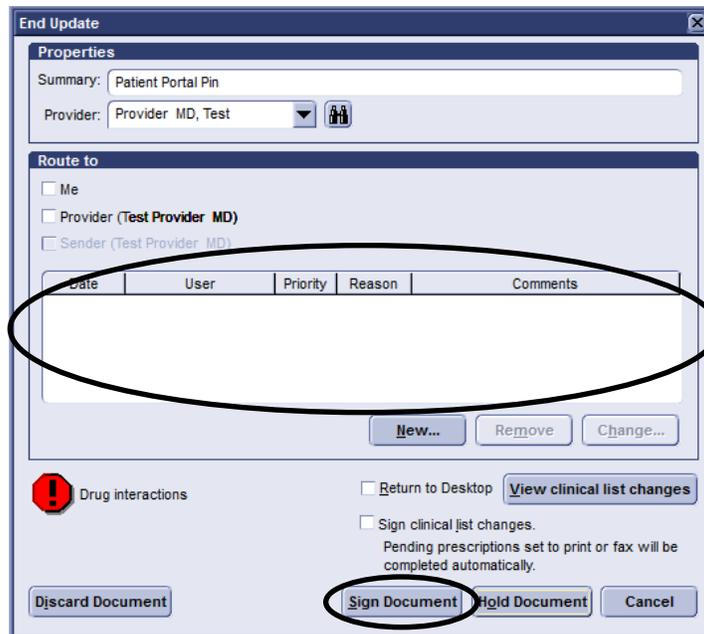


Click Remove so that this document is not routed to the provider's desktop.

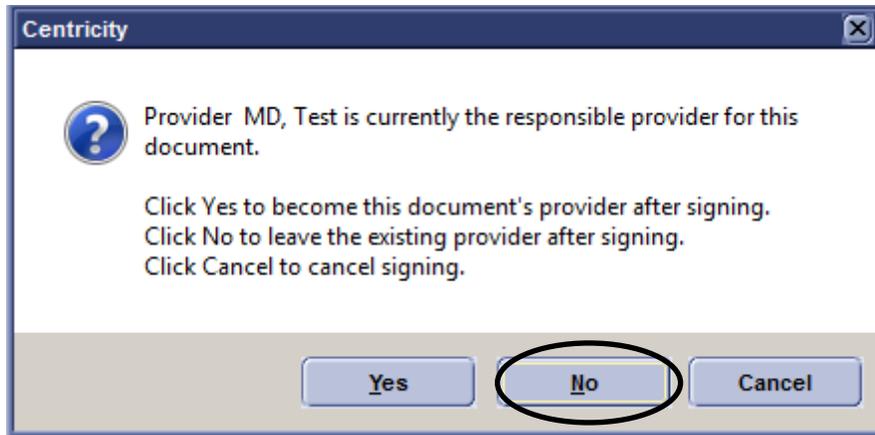


There should not be any names in the Route to box.

Click Sign Document.



Click, No at the prompt to become the responsible provider of this document.



Once the document is signed, the patient will receive a notification email. Within that email is a link to the portal. They will establish their account and then be directed to the Secure Message Inbox. They will see the email with the instructions for completing their portal registration.