Patient Portal: Authorized Representative Setup

Every patient account can currently have two portal users: the patient and an authorized representative.

The Authorized Representative is a way for the practice to document a user that has access to a patient's portal account (versus giving the representative the patient's activation code).

Menu Navigation

Practice Management > Patient Info > Patient Information/New Patient Registration > Buttons - Patient Information

Patient Information > Patient Portal

Enter the patient's information screen and click the Patient Portal button at the top.

Click Authorized Representative

Click the Authorized Representative button at the top of the screen. NOTE: The patient does not need to have an active portal account to add an authorized representative.

Answer the Prompt

If there are no authorized representatives, a popup will appear asking if you would like to create a new one. Click Yes to open the Authorized Representative's information screen.

Enter Representative's Information

Enter the representative's full name, address, phone number, email address, birthday and relationship.

Copy HIPAA Contact

Use the Copy HIPAA Contact button to quickly pull in one of the patient's HIPAA contact's information.

Same Address As Patient

Click the Same Addr As Patient button to quickly copy in the patient's address in the address fields.

Optional Fields

The Relationship Type and End Date are optional fields. You can configure the end date by selecting "1 Day Before Patient's __ Birthday."

Consent Document

A consent document can be tied to the authorized representative. This is useful in the case of an adolescent patient as consent can be used to explain the patient's rights and what information the parent has access to.

Save > Send or Skip Activation Letter

Click the Check Mark to save the information and select whether you would like to print, email, or skip sending an activation letter.

Settings

The authorized representative's settings will be accessible anytime after a representative is added, including before the account is activated.