

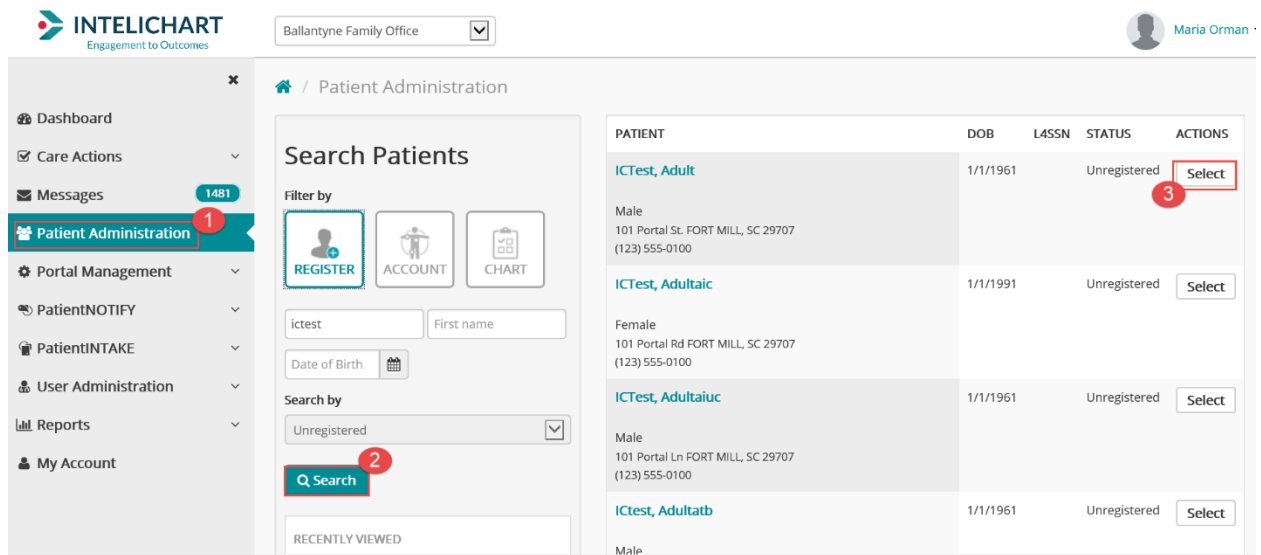


INTELICHART “How To” Patient Registration Process

Register a Patient in the Practice Portal

In order for patients to be able to log into the IntelliChart® Patient Portal, they can obtain a PIN from their facility or provider's office or be assigned a Verification Question. To obtain the patient's unique ten-digit PIN, patients must follow these steps:

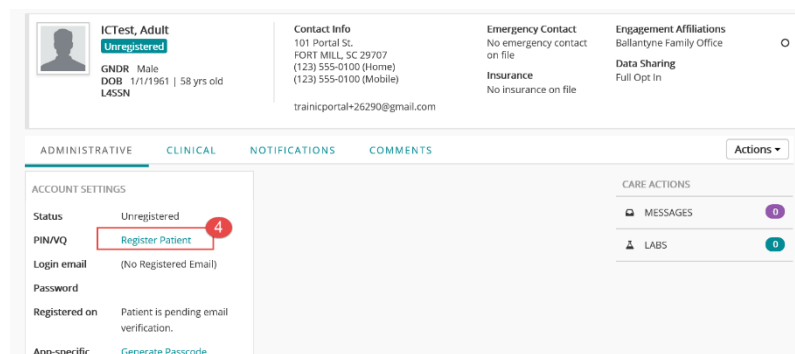
1. In the Practice Portal, click **Patient Administration**.
2. Enter the patient's name in the **Search for Patients**.
3. Click on the **Select** button in the search results grid to begin the registration process.



The screenshot shows the IntelliChart Patient Administration interface. On the left is a navigation menu with 'Patient Administration' highlighted (callout 1). The main area is titled 'Search Patients' and contains a search form with fields for 'First name' (containing 'ictest', callout 2) and 'Date of Birth'. Below the search form is a 'Search' button (callout 2) and a 'RECENTLY VIEWED' section. On the right is a table of search results:

PATIENT	DOB	L4SSN	STATUS	ACTIONS
ICTest, Adult Male 101 Portal St. FORT MILL, SC 29707 (123) 555-0100	1/1/1961		Unregistered	Select (callout 3)
ICTest, Adultaia Female 101 Portal Rd FORT MILL, SC 29707 (123) 555-0100	1/1/1991		Unregistered	Select
ICTest, Adultaiauc Male 101 Portal Ln FORT MILL, SC 29707 (123) 555-0100	1/1/1961		Unregistered	Select
ICTest, Adultatb Male	1/1/1961		Unregistered	Select

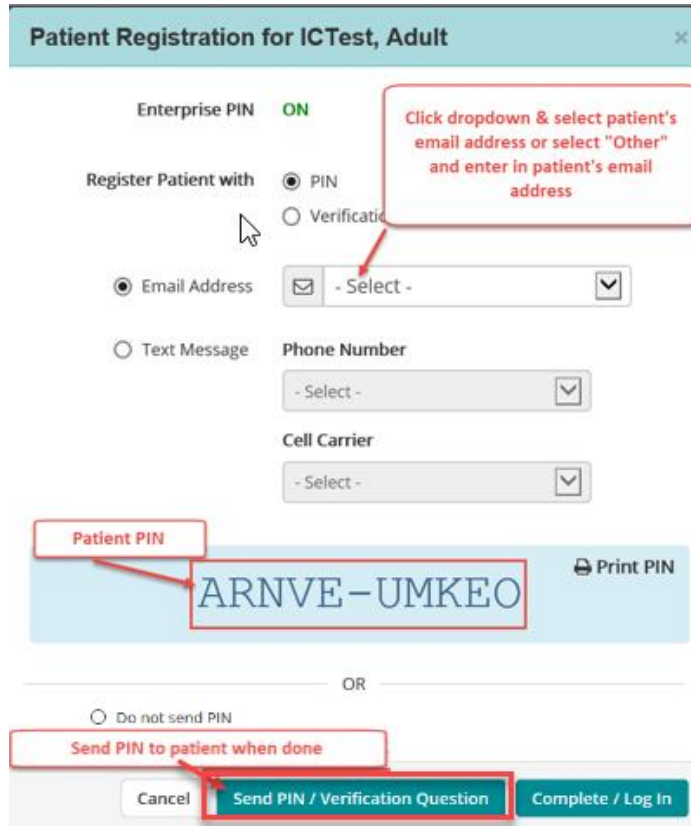
4. The Registration process can also be initiated after opening the Patient Account page and clicking on the **Register Patient** link to begin the registration process.



The screenshot shows the Patient Account page for 'ICTest, Adult'. The patient is currently 'Unregistered'. The page is divided into several sections:

- Administrative:** Includes contact info (101 Portal St., FORT MILL, SC 29707), emergency contact (none on file), insurance (none on file), and engagement affiliations (Ballantyne Family Office).
- Account Settings:** Shows status as 'Unregistered' (callout 4), PIN/WQ, login email (none), password, and a 'Register Patient' link. It also notes the patient is pending email verification and provides a 'Generate Passcode' link.
- Care Actions:** Shows 0 messages and 0 labs.

1. The PIN is the ten-digit alphanumeric characters that appear in the pop-up window. This is the PIN to be given to the patient. In the below example, the PIN is **IYOOM-DUCGX**.



2. Enter the patient's email in the **Send a welcome message** field. The **Text Message** option can be used instead of email address. Select **Text Message** option and click dropdown field to choose the patient's cell phone number or choose **Other** and enter the cell phone number. Click on the dropdown in the **Cell Carrier** field to choose the patient's cell phone service carrier.
3. Click **Send PIN/Verification Question**.

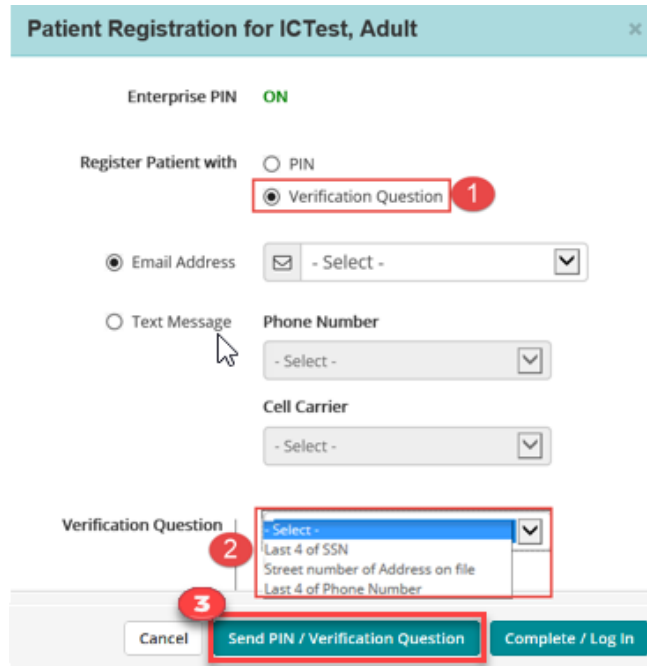


NOTE: A unique PIN is created each time the registration pop-up is displayed. The patient registering is required to use the most recent PIN create in the Portal.

The patient will receive a welcome email with the Patient Portal registration URL and PIN. If **Text Message** option was used, the patient will receive a text with the PIN and registration URL.

To register a patient using an assigned Verification Question select the **Verification Question** option from **Patient Administration**.

1. Select **Verification Question** option
2. Assign verification question from drop-down list
3. Click **Send PIN/Verification Question**.



The patient will receive a welcome email or text message with the Patient Portal registration URL. After clicking the URL, the patient will complete the registration answering the assigned verification question.

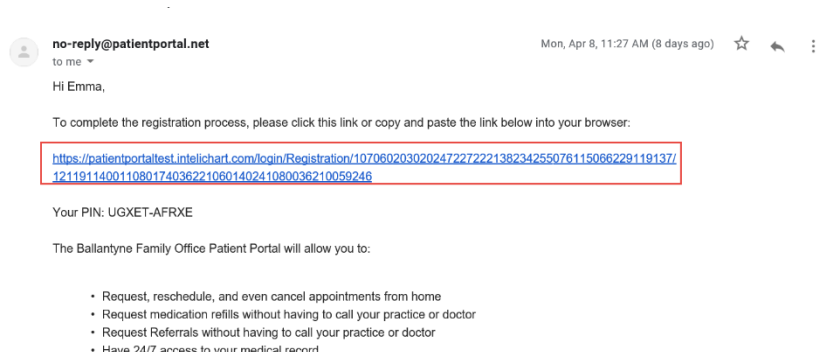


NOTE: *Verification Question options will be based on the availability of patient information in the vendor system.*

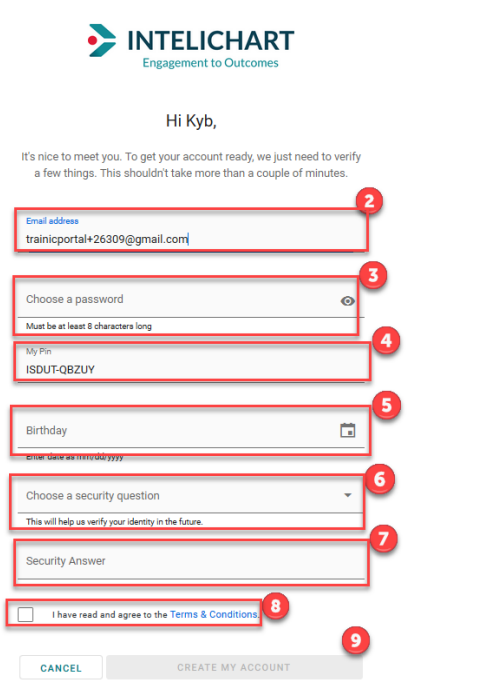
Welcome Email

To create an INTELICHART® Patient Portal Account with PIN, click on the registration URL in the Welcome Message email.

1. Click **Registration Link**



2. Patient enters **Email** which will be used to access the Patient Portal
3. Patient enters **Password** which will be used to access the Patient Portal
4. **PIN** is auto-populated
5. Enter **Birthday**
6. Select the **Security Question**.
7. Enter the answer to the selected **Security Question** (Security Question will be used in the event the patient needs to reset their password)
8. Check the box indicating the **Terms & Conditions** have been read and agreed to
9. Click **Create My Account**



INTELICHART
Engagement to Outcomes

Hi Kyb,

It's nice to meet you. To get your account ready, we just need to verify a few things. This shouldn't take more than a couple of minutes.

2 Email address
trainicportal+26309@gmail.com

3 Choose a password
Must be at least 8 characters long

4 My Pin
ISDUT-QBZUY

5 Birthday

6 Choose a security question
This will help us verify your identity in the future.

7 Security Answer

8 I have read and agree to the Terms & Conditions

9 CANCEL CREATE MY ACCOUNT