

## PATIENT PORTAL HELP

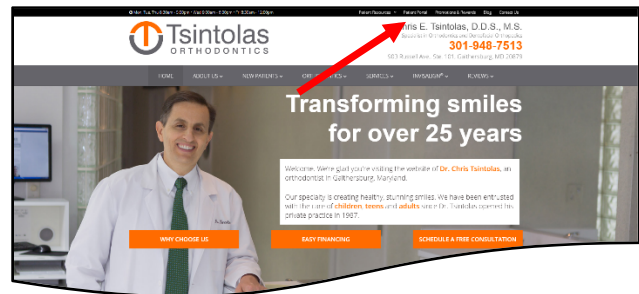
Find help here with:

- Patient Portal Registration Process
- Additional Verification Process
- Forgotten Password or Unable to Log In
- Printing Appointment and Account Reports
- Accessing All Family Members on the Patient Portal

## PATIENT PORTAL REGISTRATION PROCESS

Please go to our website:  
[www.DrTOrthodontics.com](http://www.DrTOrthodontics.com).

Click on Patient Portal located at the top right of the page.



On the Patient Portal page, click on the big orange button:  
**CLICK HERE TO ACCESS THE PORTAL**



The Patient Portal sign in screen displays.

Begin the registration process by clicking on Register Responsible Party.



Please provide all requested information on the Responsible Party Registration page.

For the easiest registration process, please enter the first and last name of the person financially responsible for the patient's account.

- If both parents are responsible, please enter the husband's first and last name.
- If unsure of the responsible party, please check your contract or call the office.

Please use the calendar to enter the patient birthdate.

Enter your email address and cell phone number.

Click the Register button.



The screenshot shows the 'Responsible Party Registration' form for Tsintolas Orthodontics. It includes fields for 'Responsible Party First Name', 'Responsible Party Last Name', and 'Patient Birthdate' (with a calendar icon). Below these is a note: 'If you have multiple patients that you are responsible for, you only need to register one time with a patient's birthdate.' At the bottom, there are fields for 'Email Address' and 'Cell Phone', and a 'Register' button.

If the "Registration successful!" box, at right, does not appear, please skip to the section entitled **ADDITIONAL VERIFICATION**. Otherwise, please continue.

The "Registration successful!" box, at right, appears.

A verification code is being sent to your email address and cell phone.

Click the [here](#) link.



The screenshot shows a message box with the Tsintolas Orthodontics logo at the top. The text inside reads: 'Registration successful! Click [here](#) to verify registration.'

The Verify Registration displays.

Please enter your email address.

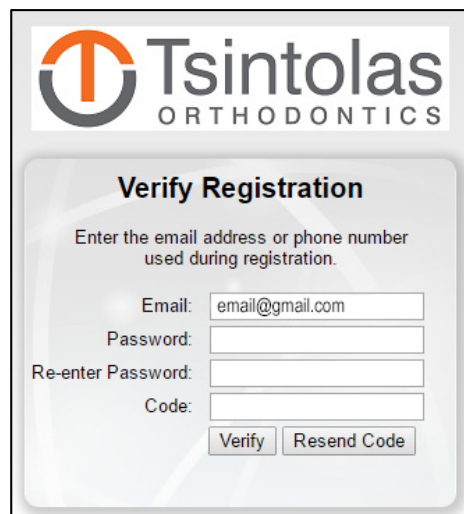
Create your password.

Re-enter your password.

Check your email and text messages for the verification code.

Enter the code.

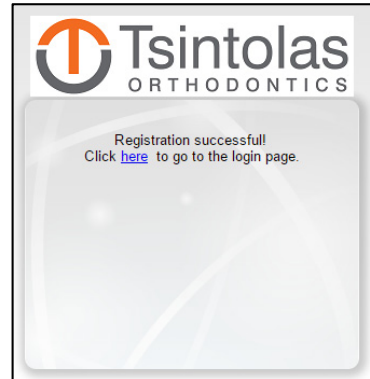
Click the Verify button.



The screenshot shows the 'Verify Registration' form for Tsintolas Orthodontics. It prompts the user to 'Enter the email address or phone number used during registration.' The form includes fields for 'Email' (with 'email@gmail.com' as a placeholder), 'Password', 'Re-enter Password', and 'Code'. At the bottom, there are 'Verify' and 'Resend Code' buttons.

Registration Successful!

Click the [here](#) link.



Enter your email and password.

Click the Login button.

The Patient Portal opens and is ready for you to peruse and use!



## ADDITIONAL VERIFICATION PROCESS

If the system does not recognize the responsible party name or the email address entered on the Responsible Party Registration Page, additional verification is required.



The screenshot shows the 'Responsible Party Registration' form for Tsintolas Orthodontics. The form includes the following fields: Responsible Party First Name, Responsible Party Last Name, Patient Birthdate, Email Address, and Cell Phone. A 'Register' button is located at the bottom right. A note states: 'If you have multiple patients that you are responsible for, you only need to register one time with a patient's birthdate.'

Enter either the Last Payment Amount OR the Next Appointment Date for the patient associated with the birthdate.

Format the dollar and cents as 100.00, omit the \$ symbol.

Use the calendar to select the next appointment date.

Click the Register button.



The screenshot shows the 'Responsible Party Registration' form for Tsintolas Orthodontics with the following fields filled: Responsible Party First Name: John, Responsible Party Last Name: Smith, Patient Birthdate: 12/12/2012, Email Address: email@gmail.com, Cell Phone: 3011234567. Below these fields, there are additional fields for Last Payment Amount and Next Appointment Date. A 'Register' button is at the bottom right. A note states: 'Email and phone not found, please use next appointment date or last payment amount to register.'

### **DID YOU ENCOUNTER A PROBLEM WITH THIS STEP?**

If you entered the correct last payment amount and the correct next appointment date and you are unable to advance beyond the Responsible Party Registration screen, please **READ THIS TO RESOLVE**.

Edit the Responsible Party First and Last Name to match the information in our database:

- if both parents are responsible, please enter the husband's first and last name
- check spelling
- check nickname vs. full name
- check your contract to obtain Responsible Party First and Last Name
- call our office for the Responsible Party First and Last name.

When the Responsible Party First and Last Name matches the information in our database, please again enter the last payment amount or the next appointment date.

Click the Register button.

This confirmation message appears when you have successfully registered.

A verification code is being sent to your email address and cell phone.

Click the [here](#) link.



The Verify Registration displays next.

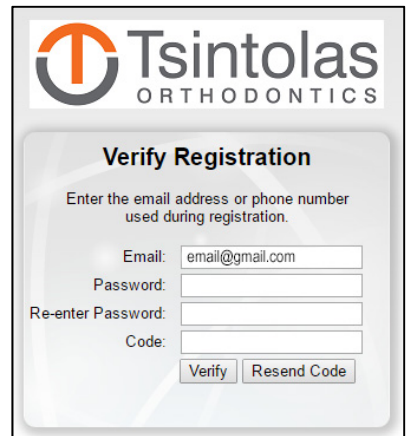
Please enter your email address.

Create your password.

Re-enter your password.

Check your email and text messages for the verification code; enter the verification code.

Click the Verify button.



Registration Successful

Click the [here](#) link.



Enter your email and password.

Click the Login button.

The Patient Portal will open and is ready for you to peruse and use!



## FORGOTTEN PASSWORD OR UNABLE TO LOG IN

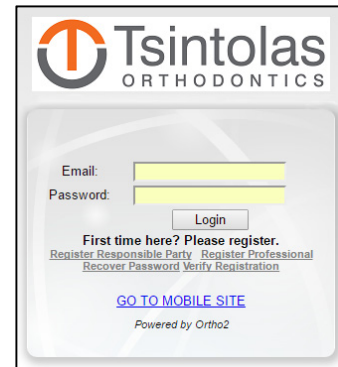
### FORGOTTEN PASSWORD:

On the sign in screen, click the [Recover Password](#) link and follow the instructions.

The office does not have access to your password.

### UNABLE TO LOG IN

The simplest solution is to re-register if you are unable to log in because your password is unrecoverable or your login credentials are rejected.



## PRINTING APPOINTMENT AND ACCOUNT REPORTS

To print an Appointment Information Report, select the desired family member and navigate to Appointment Information. Right click anywhere in the body of the Appointment Information Report, select Print from the pop-up menu, and follow your usual printing protocol.

To print a Financial Information Report, select the desired family member, navigate to Financial Information, and select the desired Account. Right click anywhere in the body of the Account Information Report, select Print from the pop-up menu, and follow your usual printing protocol.

## ACCESSING ALL FAMILY MEMBERS ON THE PATIENT PORTAL

For most families, one set of login credentials is sufficient to access all family members on the Patient Portal.

If a family member is not included on the Patient Portal dashboard, please complete a registration for that family member with his/her birthdate. Two [or more] sets of login credentials may be required to access all family members on the Patient Portal.

Please keep in mind when creating multiple login credentials to use the Responsible Party First and Last Name associated with the patient for whom you are registering. Family members may have different Responsible Parties. For example, the mother may be the Responsible Party for one child and both parents may be the Responsible Party for the other child. [If both parents are responsible, please use the husband's first and last name when registering.]