

PATIENT PORTAL HELP

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PATIENT PORTAL REGISTRATION

Registration is required to access the Patient Portal.

Please go to our website:

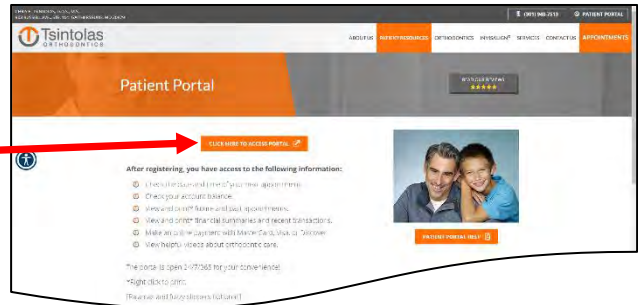
www.DrTOrthodontics.com

Click on **Patient Portal** in the top right corner.



On the Patient Portal page, click on the big orange button:

CLICK HERE TO ACCESS THE PORTAL



The Patient Portal sign-in window appears.

Begin registration by clicking on **Register Responsible Party**.



Please provide the requested information with these tips in mind.

- Responsible Party First and Last Name
 - If both married parents are responsible for the account, enter the husband's first and last name exactly as provided to our office.
 - If one person is responsible for the account, enter his or her first and last name exactly as provided to our office.
 - If unsure how the responsible party name is recorded in our database, please check your contract or call the office.
- Patient Birthdate
 - Use the calendar and select the patient's birthdate.
 - If multiple family members are patients, enter the birthdate for one patient.
- Email Address
 - If both married parents are responsible for the account, enter the husband's primary email address. If the husband's email address was not provided to our office, enter the wife's primary email address.
 - If one person is responsible for the account, enter his or her primary email address.
 - What is the primary email address? Our database accommodates up to two email addresses per person responsible for the account. Of those two email addresses, one is primary and the other is secondary. If a responsible party has only one email address, it is his or her primary email address.
 - **VERY IMPORTANT.** Once registered, the Patient Portal allows the user to change the Responsible Party Email- please refrain from making that change. Read more [here](#).
- Cell Phone
 - Any cell phone number should work. [Tip: A text verification code will be sent to the cell phone.]

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Responsible Party Registration

Responsible Party First Name:

Responsible Party Last Name:

Patient Birthdate:

If you have multiple patients that you are responsible for, you only need to register one time with a patient's birthdate.

Email Address:

Cell Phone:

Click the **Register** button once all fields are completed.

- ☺ If the **Registration successful!** window, at right, appears- you aced it!
- A verification code is sent to the registration email and registration cell phone.
- As prompted, **Click here to verify registration**.
- Proceed to the next step, Verify Registration.

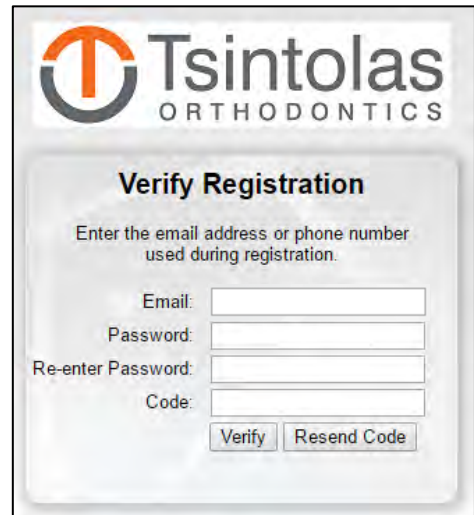


- ☹ If the **Registration successful!** window did not appear, skip to **[ADDITIONAL VERIFICATION](#)**.



The Verify Registration window appears.

- Email
 - Enter the registration email address.
- Password
 - Create a password and enter it here.
- Re-enter Password
 - Re-enter your password.
- Code
 - Check your email and text messages for the verification code.
 - Enter the verification code.
- Resend Code
 - If you need the verification code sent again, click on **Resend Code**.
The verification code is sent to the registration email address and cell phone number.



Click the Verify button.

😊 Registration Successful!

As prompted, **Click here to go to the login page**.



You are returned to the Patient Portal sign-in window.

- Email
 - Enter the registration email address.
- Password
 - Enter your password.

Click the Login button.

The Patient Portal opens.



ADDITIONAL VERIFICATION

In some circumstances, registration requires additional verification.

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Responsible Party Registration

Responsible Party
Responsible Party First Name:
Responsible Party Last Name:
Patient Birthdate:

If you have multiple patients that you are responsible for, you only need to register one time with a patient's birthdate.

Email Address:
Cell Phone:

Please provide the requested information with these tips in mind.

- Responsible Party First and Last Name
 - If both married parents are responsible for the account, enter the husband's first and last name exactly as provided to our office.
 - If one person is responsible for the account, enter his or her first and last name exactly as provided to our office.
 - If unsure how the responsible party name is recorded in our database, please check your contract or call the office.
- Patient Birthdate
 - Use the calendar and select the patient's birthdate.
 - If multiple family members are patients, enter the birthdate for one patient.
- Email Address
 - If both married parents are responsible for the account, enter the husband's primary email address. If the husband's email address was not provided to our office, enter the wife's primary email address.
 - If one person is responsible for the account, enter his or her primary email address.
 - What is the primary email address? Our database accommodates up to two email addresses per person responsible for the account. Of those two email addresses, one is primary and the other is secondary. If a responsible party has only one email address, it is his or her primary email address.
 - **VERY IMPORTANT.** Once registered, the Patient Portal allows the user to change the Responsible Party Email- please refrain from making that change. Read more [here](#).
- Cell Phone
 - Any cell phone number should work. [Tip: A text verification code will be sent to the cell phone.]
- Last Payment Amount OR the Next Appointment Date for the patient associated with the birthdate.
 - Omit the \$ symbol. Format the dollar and cents as: 123.45
 - Use the calendar and select the next appointment date.

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Responsible Party Registration

Responsible Party
Responsible Party First Name: John
Responsible Party Last Name: Smith
Patient Birthdate: 12/12/2012

If you have multiple patients that you are responsible for, you only need to register one time with a patient's birthdate.

Email Address: email@gmail.com
Cell Phone: 301234567

Email and phone not found, please use next appointment date or last payment amount to register.

Last Payment Amount:
Next Appointment Date:

Click the button once all fields are completed.



- ☺ If the **Registration successful!** window, at right, appears- you aced it!
- A verification code is sent to the registration email and registration cell phone.
 - As prompted, **Click here to verify registration**.
 - Proceed to the next step, Verify Registration.



- ☹ If the **Registration successful!** window did not appear, there is an issue with the registration information you provided. Please read the information in red below. Then, return to [Patient Portal Registration](#) and try again.

ADVICE TO RESOLVE

The Responsible Party First and Last Name must match our database.

- If both married parents are responsible for the account, enter the husband's first and last name exactly as provided to our office.
- If one person is responsible for the account, enter his or her first and last name exactly as provided to our office.
- Check spelling.
- Check for use of nickname vs. full name.
- Check your contract for the Responsible Party First and Last Name as it is in our database.
- Call our office to verify the Responsible Party First and Last name and confirm spelling.
- Call our office and request we email a registration link. Our software automatically directs the email to the primary email address of [1] the husband [2] OR the wife if we have no email address for the husband [OR] the sole individual responsible for the account.

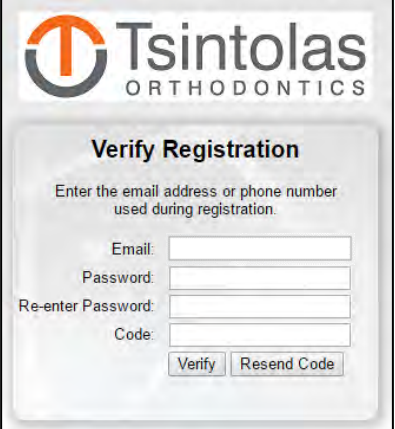
The registration Email Address must match our database.

- If married parents are responsible for the account, enter the husband's primary email address as provided to our office.
- If married parents are responsible for the account and the husband's email address was not provided to our office, enter the wife's primary email address.
- If one person is responsible for the account, enter his/her primary email address as provided to the office.
- Be sure you register with the primary email address.
[Our database accommodates up to two email addresses per person responsible for the account. Of those two email addresses, one is primary and the other is secondary. If a responsible party has only one email address, it is his or her primary email address.]
- Call our office to obtain the Responsible Party primary email.
- Call our office and request we email a registration link. Our software automatically directs the email to the primary email address of [1] the husband [2] OR the wife if we have no email address for the husband [OR] the sole individual responsible for the account.



The Verify Registration window appears.

- Email
 - Enter the registration email address.
- Password
 - Create a password and enter it here.
- Re-enter Password
 - Re-enter your password.
- Code
 - Check your email and text messages for the verification code.
 - Enter the verification code.
- Resend Code
 - If you need the verification code sent again, click on **Resend Code**.
The verification code is sent to the registration email address and cell phone number.



Click the Verify button.

😊 Registration Successful!

As prompted, **Click here to go to the login page**.



You are returned to the Patient Portal sign-in window.

- Email
 - Enter the registration email address.
- Password
 - Enter your password.

Click the Login button.

The Patient Portal opens.



FORGOTTEN PASSWORD

At the sign-in window, click the [Recover Password](#) link and follow the instructions.

The office does not have access to passwords and cannot provide forgotten passwords.

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Email:
Password:

Login

First time here? Please register.
[Register Responsible Party](#) [Register Professional](#)
[Recover Password](#) [Verify Registration](#)

[GO TO MOBILE SITE](#)

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UNABLE TO LOG IN

Gee, it always worked before. What's up with this?

If you are unable to log in and it's not because you have [forgotten your password](#), the simplest solution is to repeat the [Patient Portal Registration](#).

Remember...login credentials are invalidated when the email is changed inside the Patient Portal. Click [here](#) to read more.

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Email:
Password:

Login

First time here? Please register.
[Register Responsible Party](#) [Register Professional](#)
[Recover Password](#) [Verify Registration](#)

[GO TO MOBILE SITE](#)

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I CAN'T ACCESS ALL FAMILY MEMBERS ON THE PATIENT PORTAL

For most families, one set of Patient Portal login credentials provides access to all family members who are patients of the practice.

If one or more family members are missing from your Portal account, we offer this remedy.

- Once the first [Patient Portal Registration](#) is complete, take inventory of the patients shown on your dashboard. Now, make a note of the patient(s) missing from the dashboard. If more than one patient is missing from the dashboard, select one as the target patient.
- Complete a second [Patient Portal Registration](#) and **consider these tips:**
 - Register with the Responsible Party First and Last Name for the target patient. Family members may have different Responsible Parties. For example, the mother may be responsible for one child's account and both married parents may be responsible for the other child's account. Another example is both married parents are responsible for all children and one parent is responsible for his or her own patient account.
 - Register with the birthdate of the target patient.
 - If the primary email address of the person responsible for the target patient's account is the same email address used for the first registration, please stop here and call the office. **Do NOT use the same email address associated with the first registration- the login credentials for the first registration will be invalidated!** We will assist with determining the best registration email address. It may be possible for us to adjust our database so that a different email address is available for the login credentials of the second registration. If we can't resolve this in our database, we may ask for an alternate email address.

Hopefully, two Patient Portal accounts provides access to all family members. If that is not the case, repeat the [Patient Portal Registration](#) and create accounts for the remaining family members.

VERY IMPORTANT. Once registered, the Patient Portal allows the user to change the Responsible Party Email- please refrain from making that change. Read more [here](#).

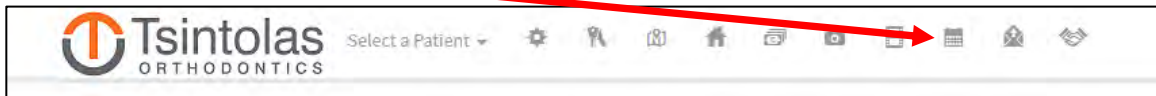


PRINTING APPOINTMENT AND ACCOUNT REPORTS

APPOINTMENT INFORMATION REPORT

It is easy to print an Appointment Information Report.

- Log in to the [Patient Portal](#).
- Identify and select the desired family member.
- Click the **calendar icon** in the top menu to navigate to Appointment Information.



- Right click anywhere in the body of the Appointment Information Report.
- Select print from the pop-up menu.
- Follow your usual printing protocol to print the Appointment Information Report.

FINANCIAL INFORMATION REPORT

It is easy to print a Financial Information Report.

- Log in to the [Patient Portal](#).
- Identify and select the desired family member.
- Click the **dollar icon** in the top menu to navigate to Financial Information.



- Select the desired account.
- The Account History will appear below the list of accounts; you may need to scroll down.
- Right click anywhere in the body of the Account History.
- Select print from the pop-up menu
- Follow your usual printing protocol to print the Financial Information Report.



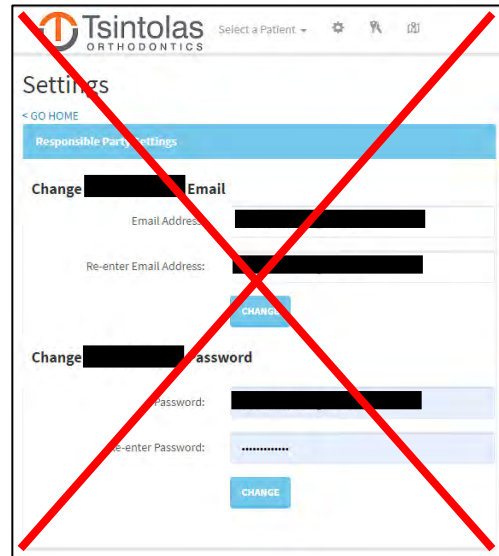
DO NOT CHANGE THE EMAIL ADDRESS INSIDE THE PATIENT PORTAL

The Responsible Party email address can be changed in Settings in the Patient Portal. **It is very important that you refrain from changing the email address.**

Changing the Responsible email address will void the login credentials. The [Patient Portal Registration](#) must be repeated.

Please do not edit patient email addresses in the Patient Portal.

We request that edits to email addresses are arranged directly with our office.



EMAIL COMMUNICATION MODULE DOES NOT CONNECT TO THE PRACTICE

Please do not use the communication feature that sends an email to the practice. Your email will be delivered to a no-reply mailbox and will not be read. Call the office for assistance.



PROBLEMS OR CONCERNS WITH ONLINE PAYMENTS

Should a problem or concern arise with an online payment, please contact our office instead of the credit card issuing bank. If you can't reach us, if it's outside of business hours, fear not!

We monitor online transactions daily for errors. We proactively fix errors, such as duplicate payments. Typically, corrections are made the same day. Otherwise, corrections are completed the next day. The individual[s] responsible for the account are notified by email of the corrections.

Our office is committed to identifying and correcting transaction errors on your behalf- quickly and accurately!

WHAT CREDIT CARDS ARE ACCEPTED FOR ONLINE PAYMENTS?

You may make online payments through the Patient Portal with MasterCard, Visa, and Discover.

Our practice does not accept American Express. The Patient Portal rejects American Express transactions. **Payment attempts with American Express can trigger processing errors with subsequent transactions.**

CHANGING THE BILLING ADDRESS FOR A CREDIT CARD

You can edit the billing address for an online payment, but the Patient Portal will not save your edit and the transaction will likely fail to receive authorization. This is a known, longstanding problem and we await resolution. We apologize for the inconvenience.

