Resolving Login Problems

1. Verify identity of the patient. (Confirm an address, SSN, DOB, or all three.)

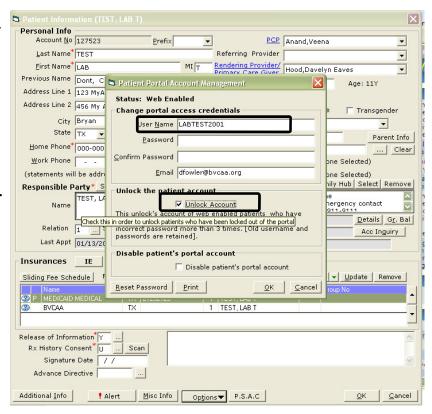
From the patient's Patient Portal Account

Management window (Info > Options >

Web-enable

- 2. Confirm the patient's username by having the patient read the name he/she is using.
- 3. If they are getting a message stating that their account has been locked, check the "Unlock Account" box.

4. Ask if they have tried the "forgot password?" feature on the patient portal login screen. If not, ask them to try this feature while on the phone with you if possible.





If further help is needed, see the following eCW suggestions, from Seven Steps to Patient Sign-on Success with the Patient Portal:

- 2. Assign a temporary user-friendly password.
- 3. Change the User Name for the patient.
- 4. Change the E-mail address of the patient.
- 5. Assign a new owner to the account

eClinicalWorks

SEVEN STEPS TO PATIENT SIGN-ON SUCCESS WITH THE PATIENT PORTAL

2 - Assign a Temporary User Friendly Password

After patients have used this temporary password the first time they sign in, they will be prompted to choose their own password.

To assign a user friendly password:

- 1. On the Patient Portal Account Management window, type a password into both password fields.
- 2. Read the password you just typed aloud to the patient.

Note: At no time will the passwords display.

3. Click OK:



4. Remind the patient that the changes will take effect in about five minutes.

Patients will then be asked to choose their own password after they sign in with this temporary user friendly password.

3 - Change the User Name for a Patient

To change a patient's user name:

- 1. On the Patient Portal Account Management window, type the new name into the User Name field.
- 2. Click OK:



Remind the patient that the changes will take effect in about five minutes.

4 - Change the E-mail Address of a Patient

To change a patient's e-mail address:

- On the Patient Portal Account Management window, type the new e-mail address into the e-mail field.
- 2. Ask the patient if he/she would like to update their user name to their e-mail address at the same time

If so, go to Step 3 for instructions in changing the user name.

3. Click OK:

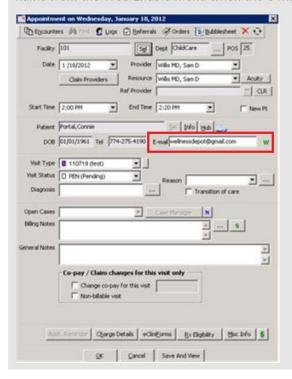
Seven Steps to Patient Sign-On Success with the Patient Portal

4 - Change the E-mail Address of a Patient



Remind the patient that the changes will take effect in about five minutes.

Note: Patients can also be initially web enabled from the Appointment menu, though not all clients will see this until an update is available. In these cases, the e-mail address becomes the patient's user name. However, updates to the e-mail address here do not update the Portal user name. Therefore, we recommend following the steps to update the Portal user name from the Web Enable menu when the e-mail address changes in these cases:



5 - Assign a New Owner to the Account

Account owners may need to be changed, for example, when a patient turns 18.

To assign a new owner to an account:

- 1. Type the new user name.
- 2. Type and confirm the password
- 3. Type the new e-mail address into the e-mail field.
- 4. Click OK:

