Activating Patient Portal

First, you must ask ICANotes to enable the Patient Portal functionality on your account. Call Support at 443-569-8778 or email ticket@icanotes.com to request that these rules be enabled: **Patient Portal Sync, Direct Messaging,** and **Always Generate CCDA.** *Note: If you do not want patients having access to their medical record, please specify that you only want portal messaging enabled.*

Second, for each patient seen, you will need to do the following:
- Enter the patient's **Email** in Demographics.
- Make sure you are listed as the Assigned Provider.
- Check the **Enable** box directly below the Email field to enable the patient's access to the portal.
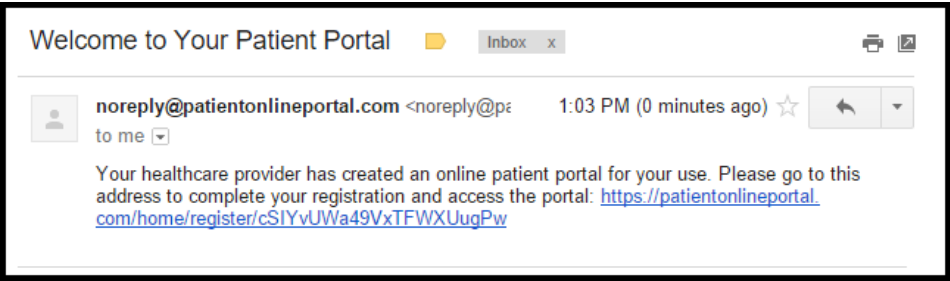

This is a screenshot from the new demographic user interface:

Using the Patient Portal

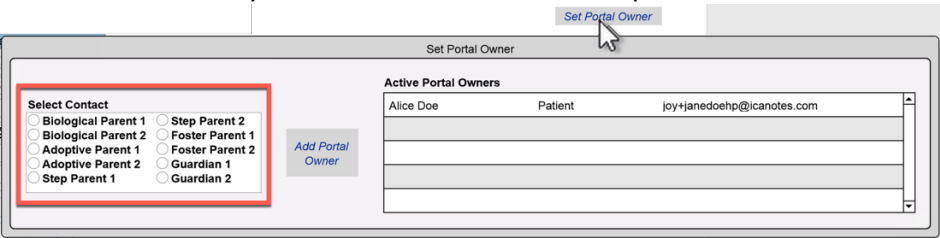The patient will receive the following email invitation to register for an account on the patient portal:

Note that the email invitation does not identify the name of your practice. This is to protect the patient's privacy. You will want to make sure the patient is aware of the portal and how to use it. Please provide patients with the Patient Portal Instructions and encourage them to register and login.

You will be able to monitor whether or not a patient has accessed the portal from the Patient Information screen in Demographics. If the patient has registered and logged in successfully, a green check mark will appear by the Portal checkbox. A Reset PW button will also appear. If the patient needs to have their portal password reset, you can do that for them by clicking the Reset PW button.

or
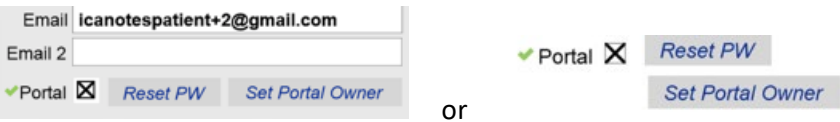
Set Portal Owner is where you can set up additional portal owners. This is commonly used for parents of patients. Remember that every email address needs to be unique.
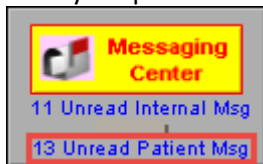

Portal Owners can be set up here:

Patient Portal

NOTE: CCDAs will only be generated for notes created AFTER you have enabled portal access for the patient in Demographics.

Regularly check the **Patient Portal** section of the Messaging Center for secure messages from your patients.

When you reply to a secure message from a patient, they will receive an email at their regular email address notifying them to check the portal for a secure message from their provider.