How do I set up representatives on my OnPatient account?

07/08/2024 7:49 pm EDT

A representative on OnPatient is an individual who may access the patient portal of another patient. This is useful for patients who may have difficulty accessing or managing their patient portal. With representatives, you can send messages and access the health profile or those represented.

Please note: Both users must have an existing account with OnPatient.

In this article, we will review:

- Setting up Representatives
- Messaging for Representatives
- Accessing the Health Profile for those Represented

Setting up Representatives

1. To add or manage your representatives, begin by logging into your patient portal and clicking on **your name**. This will bring up your OnPatient profile settings.
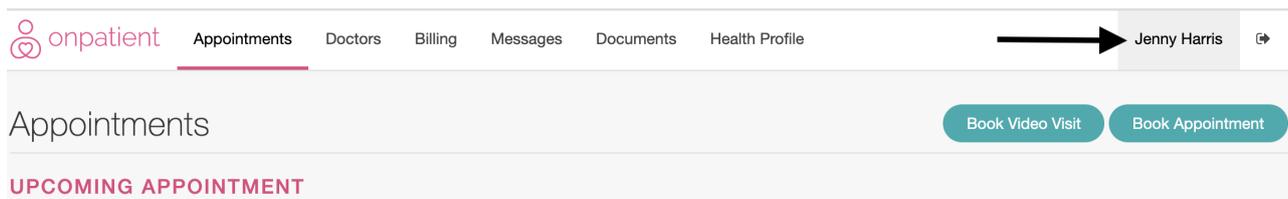
2. Within your OnPatient settings, select **Representatives** to bring up your representative management page.
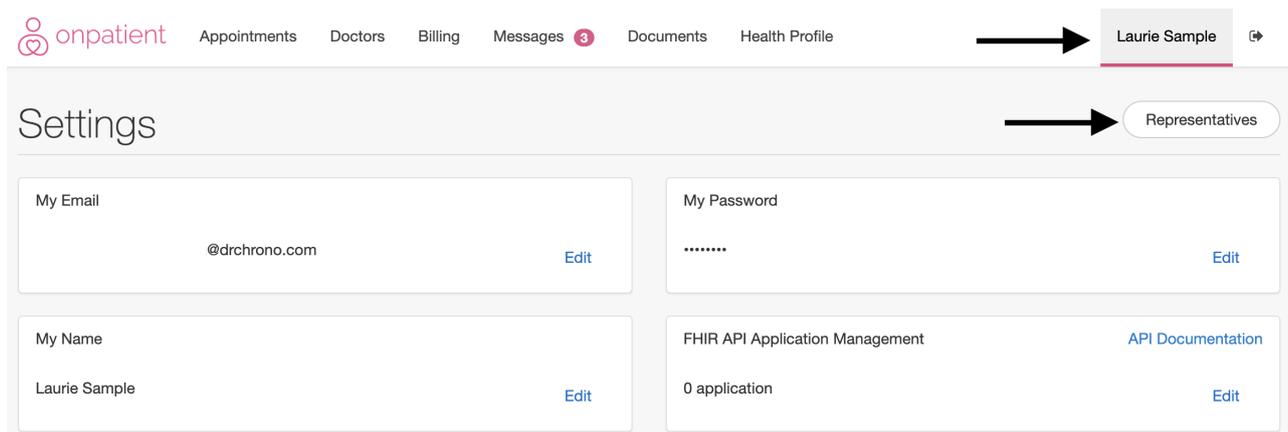
3. Select the option **Who Represents Me** and enter the email address of the person trying to gain access to the account. Click the **Search** button. The representative must have an existing OnPatient account.

4. Once OnPatient recognizes the Parent/Guardian's or other representative's email address, select the green **Allow (Representative's Name) to Represent me with (Provider's Name)** button.

5. Once approved, the representative's name will appear in the section. Click **Remove** to take the person off of your representative list.

Messaging

After the representatives have been set up, representatives can send messages on behalf of the person they represent.

Messaging

Inbox
Starred
Sent
Archived

Warning! If this is an emergency, please dial 911 or seek immediate medical attention.

Recipient
Doctor Chrono (on behalf of Jenny (Jen) Harris)

Subject

Message

Attachment
Click or Drop attachment here to upload

Send Message

Accessing the Health Profile

Go to **Whom I Represent** and click on the name of the person you represent to access their Health Profile.

My Representatives

Whom I represent
Who represents me

Name	Doctor
Jenny (Jen) Harris	Doctor Chrono

| Laurie Sample |

Problems

Allergies

Medications

Labs

| Complete Profile |

| James Smith ▾ |

🔘 All Appointments
◯ **Custom date Range**
◯ **For The Date**

Access Log

Send CCDA to   [jane@example.com]   ☐ Encrypt   **Send**   **Download PDF**   **Download C-CDA**

Patient Health Summary

Patient	Jenny Harris ◀		
Date of birth	February 11, 1980	Sex	Female
Race	White	Ethnicity	Not Hispanic or Latino
	Unknown		
	Primary Home:	Preferred Language	English (en)
	328 Gibraltar Ave		
Contact info	Sunnyvale, CA 94040, US		
	Tel (Primary Home): (844) 569-8628		
	Tel (Work Place): (650) 555-5555	Patient IDs	HAJE000001 2.16.840.1.113883.3.7621
	Tel (Cell): (650) 215-6343		111-11-1111 2.16.840.1.113883.4.1

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