Representative Access with OnPatient v2

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A representative is a family member, caregiver, or other trusted person who can access a patient's OnPatient account on their behalf. This article explains how a patient adds a representative, how the representative accepts the invitation, and how representatives switch between accounts.

In This Article

- Before You Begin
- Add a Representative
- Accept the Invitation
- Switch Between Accounts
- Change or Remove a Representative
- Frequently Asked Questions
- Need Help?

Before You Begin

- The patient whose account will be shared adds the representative from their own OnPatient account. For a minor, the parent or guardian does this from the child's account. Practice staff cannot add representatives for patients.
- Each representative needs their own email address and their own OnPatient account. They can create one while accepting the invitation.
- One person can represent more than one patient, for example a parent managing several children's accounts.

Choosing an access level

When adding a representative, the patient chooses one of two access levels:

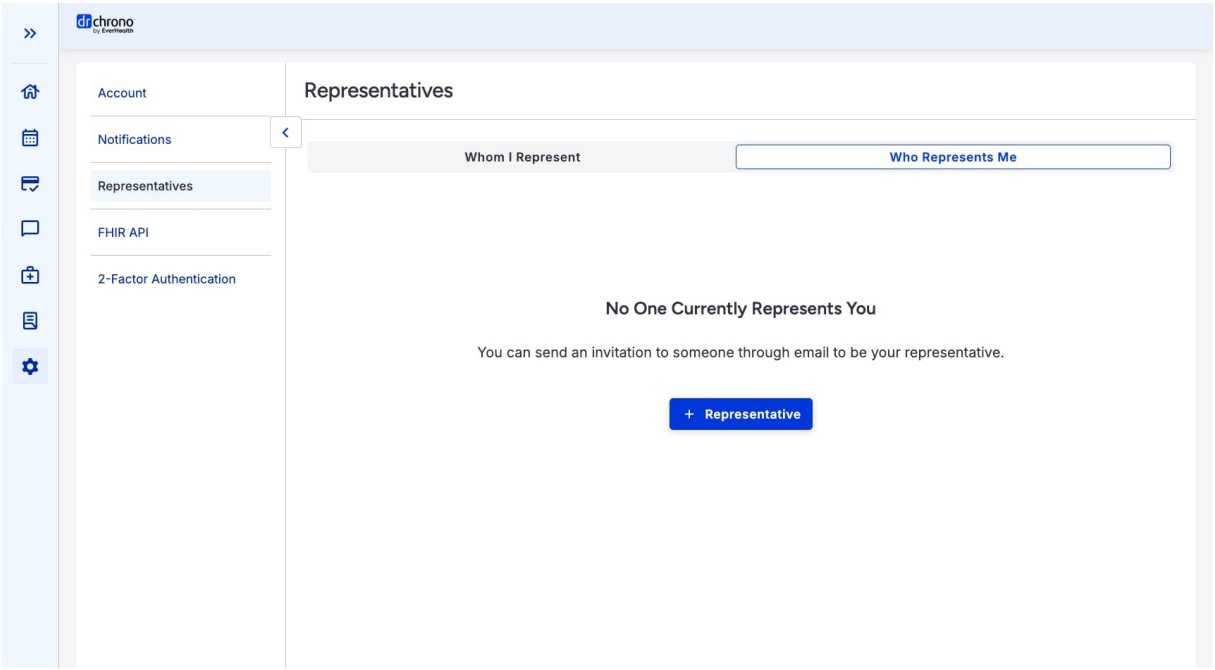
Access level	What the representative can do
Limited Access	Manage appointments on the patient's behalf, including scheduling, rescheduling, and cancellations.
Full Access	Complete read and edit permissions for all of the patient's OnPatient data.

Back to top

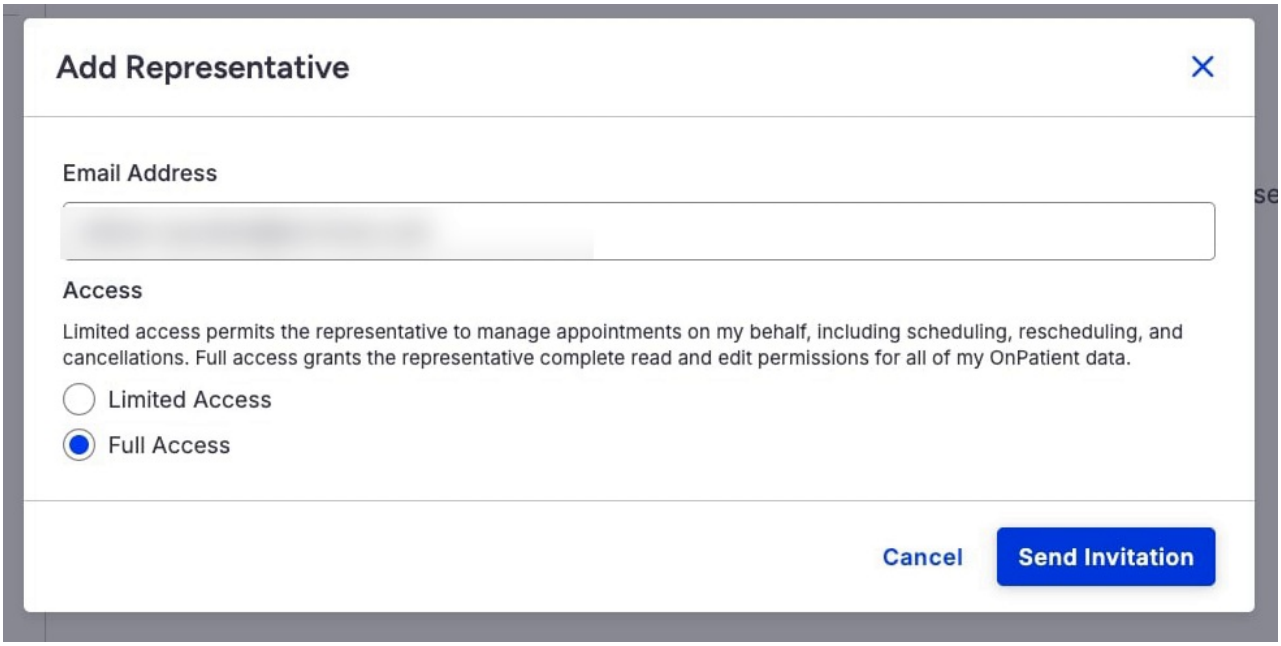
Add a Representative

These steps are completed by the patient whose account will be represented.

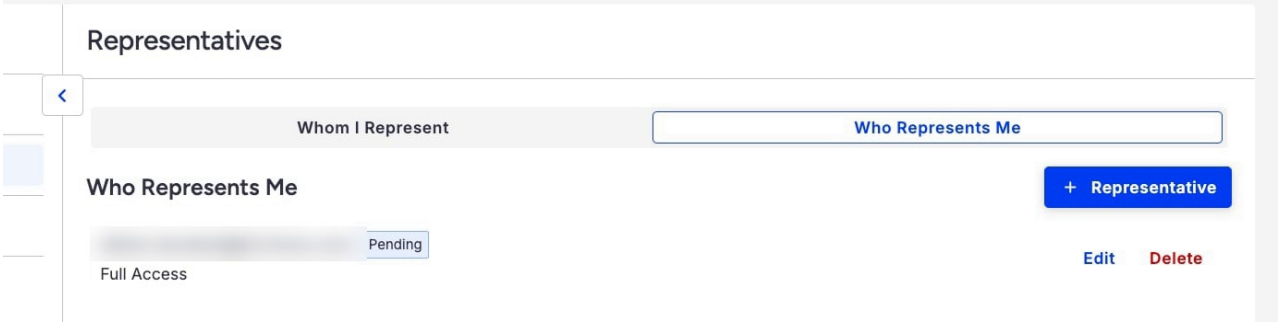
1. Log in to OnPatient and select the **Settings** icon in the left sidebar.
2. Select **Representatives**.
3. Select the **Who Represents Me** tab.
4. Select **+ Representative**.



5. Enter the representative's **Email Address**.
6. Choose **Limited Access** or **Full Access**.
7. Select **Send Invitation**.



A confirmation message appears, and the representative is listed under **Who Represents Me** with a **Pending** status until they accept.

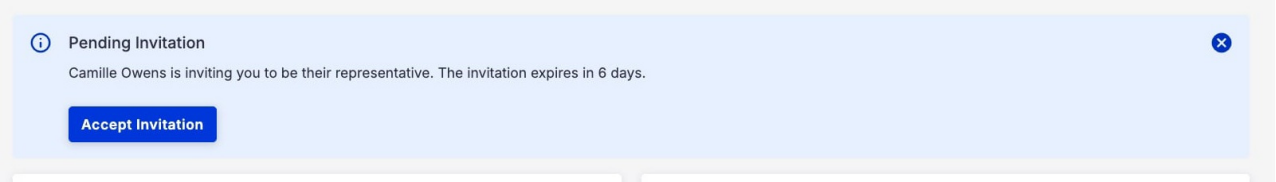


Back to top

Accept the Invitation

These steps are completed by the representative.

1. Open the OnPatient invitation email and select **Accept Invitation**.
2. Sign up for an OnPatient account, or log in if you already have one.
3. On your OnPatient home page, find the **Pending Invitation** message and select **Accept Invitation**.



A confirmation message lets you know the invitation was accepted.

> **Note:** Invitations expire after a few days. If an invitation expires before you accept it, ask the patient to send a new one.

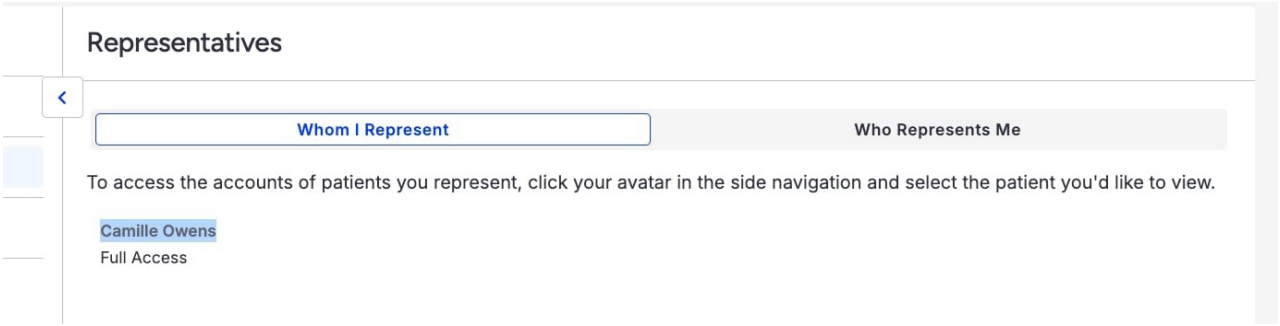
Back to top

Switch Between Accounts

Representatives use their own OnPatient login and switch to the accounts they represent.

See who you represent

1. Select the **Settings** icon in the left sidebar.
2. Select **Representatives**, then the **Whom I Represent** tab. You will see each person you represent and your access level for each.

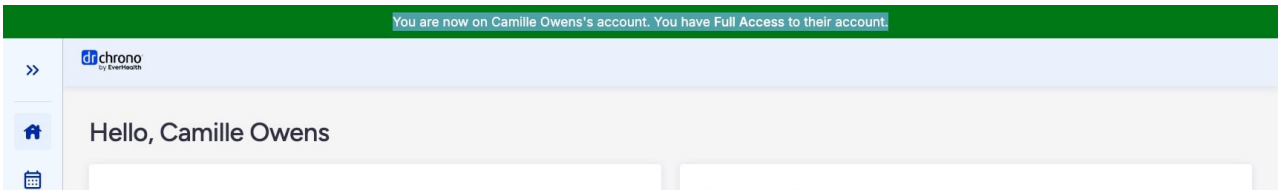


Switch to another account

1. Select your avatar at the bottom of the left sidebar.
2. Select the person whose account you want to view.



A banner at the top of the page confirms whose account you are in and your access level. To return to your own account, select your avatar again and choose your own account.



Back to top

Change or Remove a Representative

The patient can change a representative's access level or remove their access at any time.

1. Select the **Settings** icon in the left sidebar, then **Representatives**.
2. Select the **Who Represents Me** tab.
3. Next to the representative, select **Edit** to change their access level, or **Delete** to remove their access.

Back to top

Frequently Asked Questions

Can our practice staff add a representative for a patient?

No. Granting access to a patient's account has legal implications, so the patient (or the parent or guardian of a minor) must add representatives themselves.

Can a representative use the patient's email address?

No. Each representative needs their own email address and OnPatient account.

Can one person represent several patients?

Yes. There is no limit. The representative switches between accounts from the avatar menu.

Can the practice tell when a representative sends a message?

Yes. Messages show that the representative sent them on the patient's behalf.

Back to top

Need Help?

If a patient or representative has trouble with an invitation, the patient can delete the pending representative and send a new invitation. For other questions, contact our Support team.

Back to top