

PATIENT ALLY STEPS FOR MINORS

Each child's account needs to be set up separately in www.patientally.com. Each account will be USERNAME and password specific. Due to the child being a minor you will need to follow these steps:

If you are registering a minor:

Go to www.patientally.com or the email that we sent you to **REGISTER**

- Click Sign UP Now for FREE
 - o Register the account in the minor's name **BUT with the parent or guardian DOB**
 - o This verifies that an adult set it up
- Next you will have a 2-step authentication
 - o One via text
ENTER THE CODE SENT
- NEXT
 - o One via email – **DO NOT TOGGLE BACK TO THE EMAIL IF USING A PHONE. YOU MUST OPEN YOUR EMAIL IN ANOTHER SCREEN AND CONFIRM THERE. IT WILL NOT WORK IF YOU TOGGLE BACK AND FORTH**
ENTER CODE SENT - SUBMIT
NEW SCREEN FOR COUPONS - DECLINE OR ACCEPT
- **Click here - This takes you to a screen that will say ACCESS DENIED**
- Go to SETTINGS
- Go to PROFILE
 - o **Correct the DOB to the minors DOB**
- CLICK UPDATE/SAVE
 - o Arrow back at top PROFILE
Go back n to settings and verify that it accepted the change.
- If not change again and UPDATE/SAVE
- SIGN OUT

IMPORTANT STEP DO NOT SKIP OR YOU WILL NOT BE ABLE TO ACCES THE ACCOUNT

- **Go to the Registration email sent from Patient Ally that we sent you**
- CLICK REGISTER – **a green area** You will directed to Patient Ally
- **Scroll down to LOGIN CONNECT ACCOUNT/LINK ACCOUNT**
- SIGN BACK IN
 - **LINK PROVIDER – ACCEPT/SAVE You have to link our provider to the patient**
 - o A documents screen should COME UP NEW PATIENT DOCS 2022
If this DOES NOT show up on the screen PLEASE CALL/email
and let us know as the scheduler needs to send the documents over to you
- Click NEW PATIENT DOC 2022 fill this out all required areas as it is PREFILLED and SUBMIT
- These will come back to us once done You are now all set and have access.