How to Help Patients Securely Reset Their Patient Portal Password

354 TDO KB October 26, 2023 Cloud Ribbon Menu, Troubleshooting 65.22K

Overview

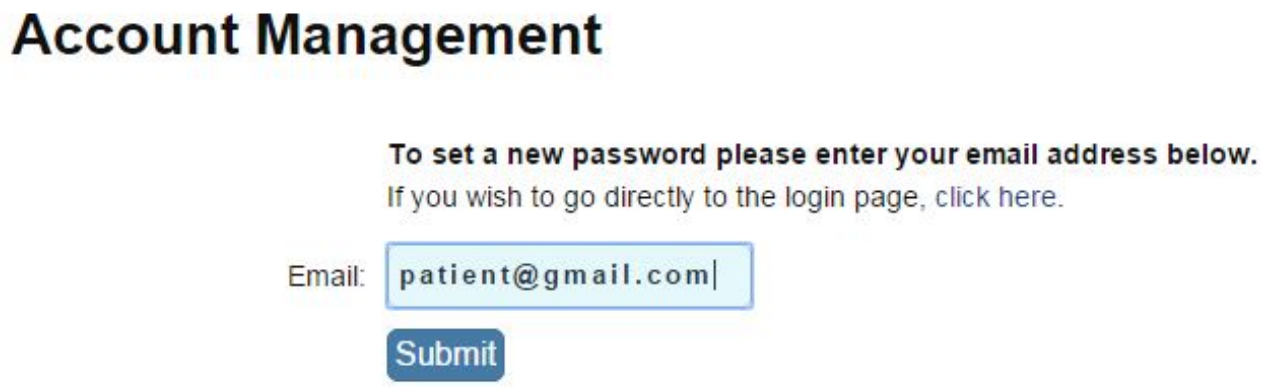
This article will go over how to help a patient reset their password for the online Patient Portal.

Detailed Instructions

- Create a Letter Template in TDO that instructs the patient to go to your patient portal's *Update Your Login Information* page (**Account Management**)

This page can usually be found at **{https://securesite[XXX].tdo4endo.com/SetLogin.aspx}** where [XXX] is replaced with the corresponding ID for your Web Services portal.

- Enter a valid email address for the patient into TDO.
- Send the Letter with the link and instructions to this email address.
- The patient will find themselves on a page that looks like the one below.



They can then enter their email address (the one where they received the letter), and click **Submit** to receive an automated email with a password reset link, which will take them to a page that will look like the one below.

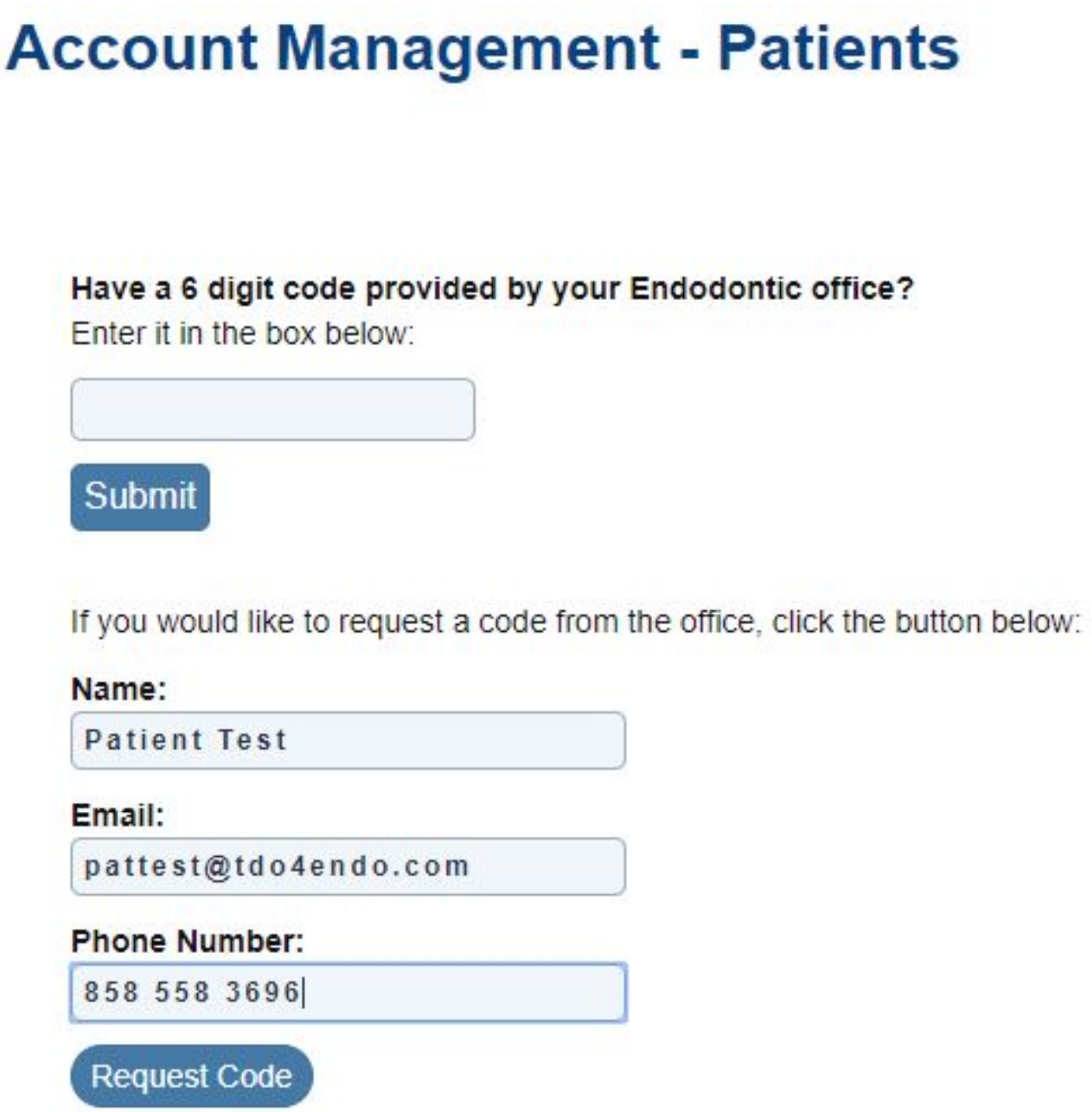


- They can use this form to create a new password for their account.

If the patient is unable to receive the verification email, they can request a reset code from you.



After clicking on the button for other options, they can request a code from you.



An email will be sent to the same email accounts that receive other notifications from the login pages. The email will list the information that the patient entered along with instructions on how to generate the reset code for the patient.

To generate the reset code, go to the Admin login area of the website.



Once logged in, search for the patient.

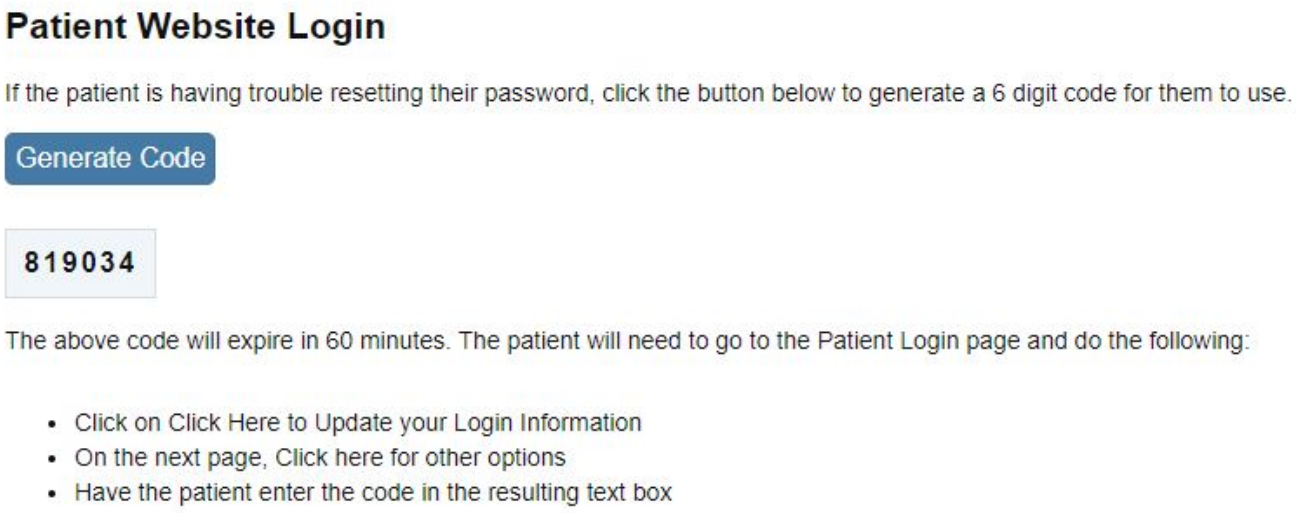


After selecting the patient, go to the Login Settings page.

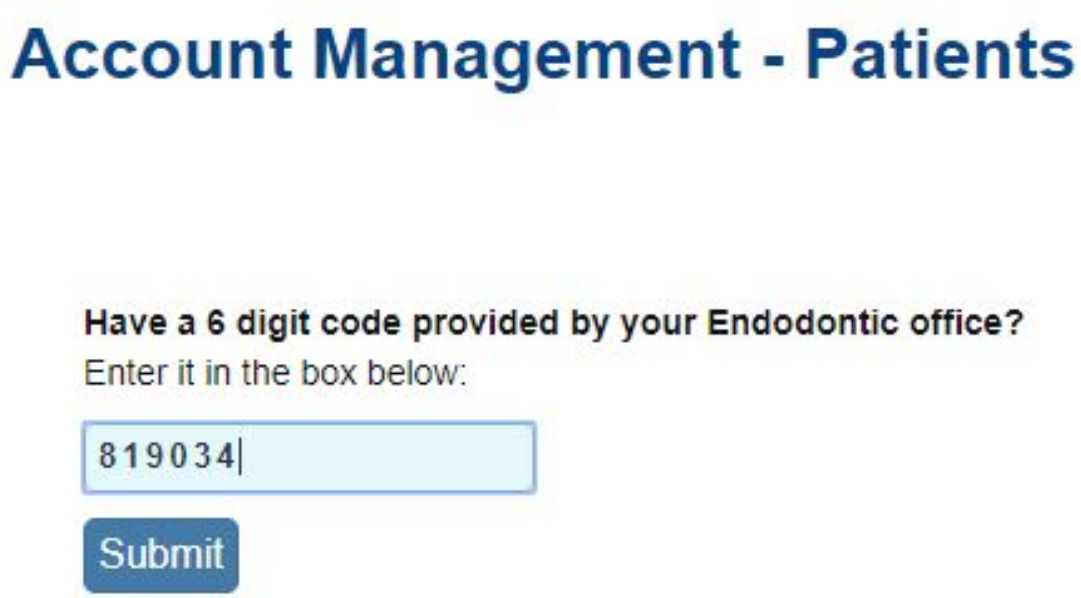




Click on Generate Code.



The patient can go back to the login page, click on the button for other options, and then enter the code.



Due to this code not being automatically sent, you will need to notify that patient of their code. After entering the code, the patient will be able to reset their password.



Online URL: https://kb.tdo4endo.com/article.php?id=354