

# How do I set up representatives on my OnPatient account?

07/24/2024 4:25 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.

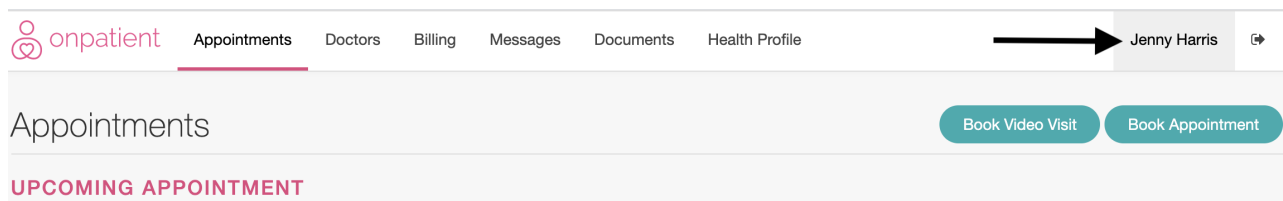
**Please note:** Both users must have an existing account with OnPatient.

In this article, we will review:

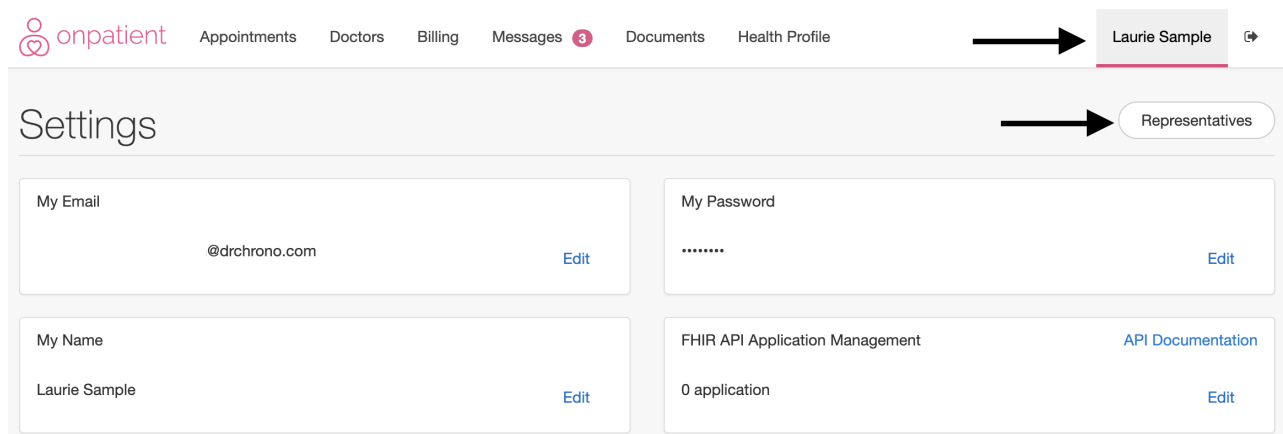
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## Setting up Representatives

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.

## My Representatives

Whom I represent

Who represents me

Email address

Search

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.

## My Representatives

Whom I represent

Who represents me

Email address

Search

Allow Edward James to represent me with Doctor Chrono

Cancel

Name	Doctor	
Jenny Harris	Doctor Chrono	Remove

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

## My Representatives

Whom I represent

Who represents me

Email address

Search

Edward James now represents you with Doctor Chrono

Name	Doctor	
Jenny Harris	Doctor Chrono	Remove
Edward James	Doctor Chrono	Remove

## Messaging

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

## Messaging

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

Inbox

Starred

Sent

Archived

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

[Jenny \(Jen\) Harris](#)

Doctor

[Doctor Chrono](#)

Laurie Sample

Problems

Send CCDA to

Encrypt

Send

Download PDF

Download C-CDA

Allergies

Medications

Labs

Complete Profile

James Smith

- All Appointments
- Custom date Range
- For The Date

Access Log

## Patient Health Summary

Patient: Jenny Harris ←

Date of birth: February 11, 1980

Race: White

Ethnicity: Not Hispanic or Latino

Sex: Female

Primary Home: 328 Gibraltar Ave, Sunnyvale, CA 94040, US

Preferred Language: English (en)

Contact info: Tel (Primary Home): (844) 569-8628, Tel (Work Place): (650) 555-5555, Tel (Cell): (650) 215-6343

Patient IDs: HAJE000001 2.16.840.1.113883.3.7621, 111-11-1111 2.16.840.1.113883.4.1

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