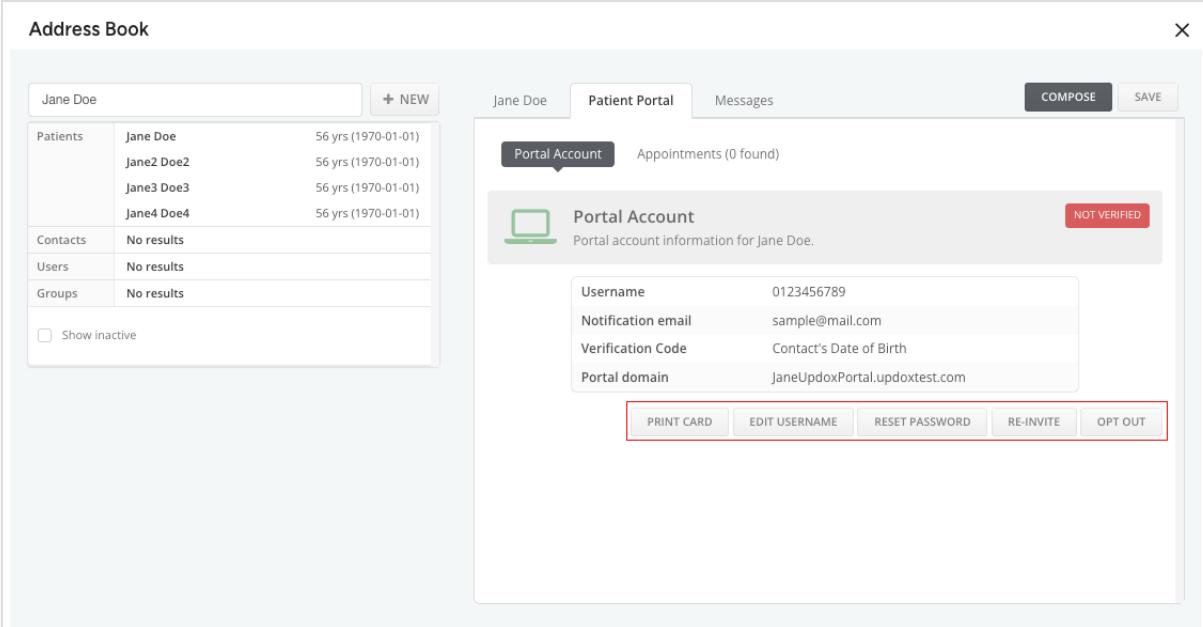


# Manage Patient Portal Accounts from the Address Book

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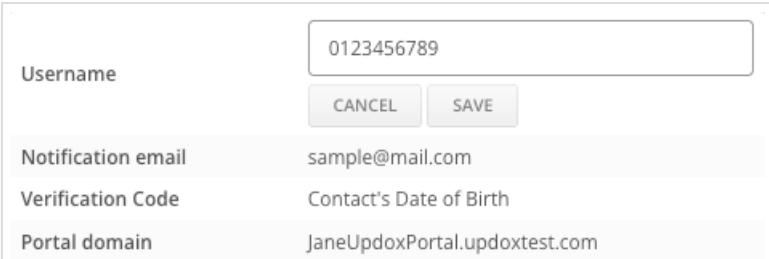
You can manage individual Patient Portal accounts from the **Address Book**.

1. From the **Inbox**, select .
2. Search for and select the patient.
3. Select the **Patient Portal** tab.



The screenshot shows the Address Book interface. On the left, there is a sidebar with sections for Patients (listing Jane Doe, Jane2 Doe2, Jane3 Doe3, Jane4 Doe4), Contacts (No results), Users (No results), and Groups (No results). A checkbox for 'Show inactive' is also present. On the right, the main area shows a list of patients under 'Jane Doe'. The 'Patient Portal' tab is selected, showing a sub-section for 'Portal Account'. It displays 'Portal account information for Jane Doe.' with fields for Username (0123456789), Notification email (sample@mail.com), Verification Code (Contact's Date of Birth), and Portal domain (JaneUpdoxPortal.updoxtest.com). Below these fields are buttons for PRINT CARD, EDIT USERNAME, RESET PASSWORD, RE-INVITE, and OPT OUT, with 'PRINT CARD' being highlighted with a red box. At the top right of the main window are 'COMPOSE' and 'SAVE' buttons.

4. Do one of the following tasks:
  - **Print Card:** If the patient doesn't have an email address, you can print a login card to provide to the patient. The card contains all the login information that the patient needs to access the Patient Portal. When you select **Print Card**, the computer's default printer options appear.
  - **Edit Username:** Use this option if a patient forgets their Patient Portal username. Select **Edit Username**, change the username, and then select **Save**.



The screenshot shows a modal dialog for editing a Patient Portal account. It has a 'Username' field containing '0123456789' with a 'CANCEL' and 'SAVE' button below it. Below this are four other fields: 'Notification email' (sample@mail.com), 'Verification Code' (Contact's Date of Birth), and 'Portal domain' (JaneUpdoxPortal.updoxtest.com).

- **Reset Password:** If the patient has an email address in patient demographics, selecting **Reset Password** generates an email with a temporary password. The temporary password also appears in the **Address Book**; however, once the **Address Book** is closed, the temporary password no longer shows.

Patients can generate a password reset from the Patient Portal login page by using the **Forgot Password** link. Refer to [Patient Portal Account Access Recovery](#).

- **Opt Out:** If the patient requests that you stop sending messages and health care records to the Patient Portal, select **Opt Out** to prevent users from sending these to the patient's portal.

The patient can change their status back to Opt In when they log in to their portal account. To do so, the patient selects the **Send protected health information to my patient portal** checkbox in the **My Profile** section of the **Account** tab on the Patient Portal.

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