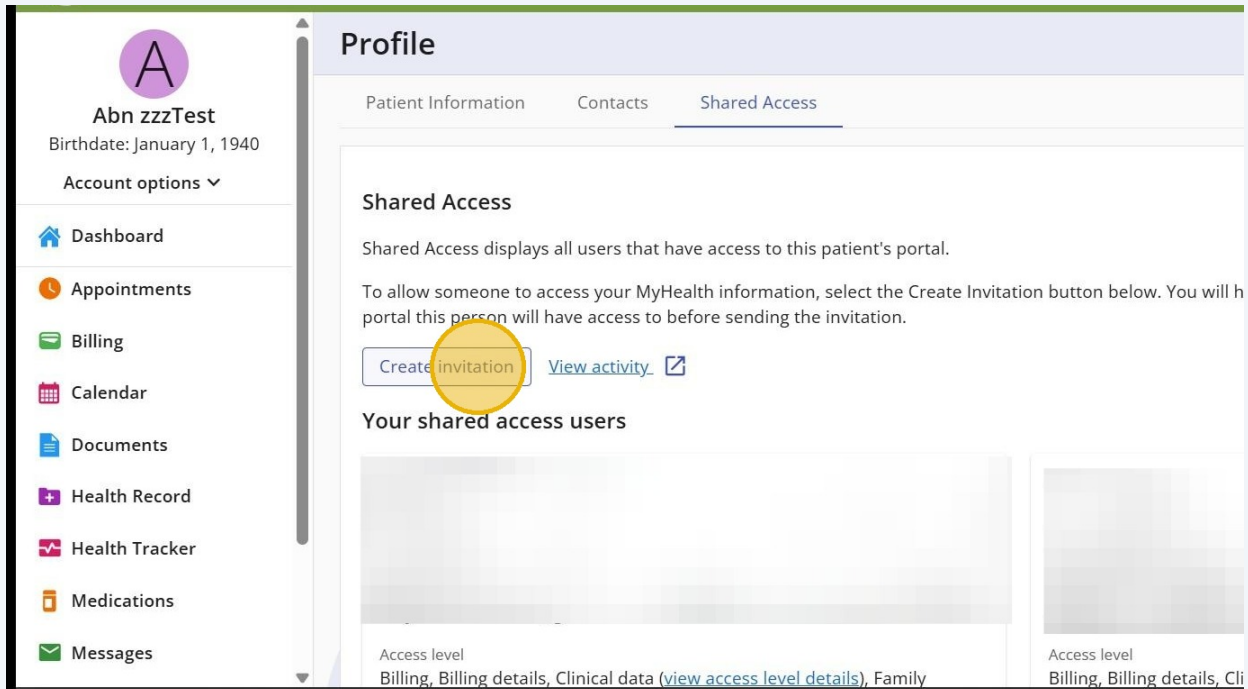


# How to share access:

Learn how to navigate the invitation creation portal to share access with family members to access your portal.

## 1 Click "Create invitation"



The screenshot shows a patient's profile page with a sidebar on the left and a main content area on the right. The sidebar contains a navigation menu with items: Dashboard, Appointments, Billing, Calendar, Documents, Health Record, Health Tracker, Medications, and Messages. The main content area is titled 'Profile' and has three tabs: Patient Information, Contacts, and Shared Access. The 'Shared Access' tab is active. Below the tabs, there is a section titled 'Shared Access' with a sub-header 'Shared Access' and a paragraph explaining that it displays all users with access to the patient's portal. Below this text are two buttons: 'Create invitation' (highlighted with a yellow circle) and 'View activity' with an external link icon. Below the buttons is a section titled 'Your shared access users' which contains two placeholder cards for users. Each card shows 'Access level' and a list of data types: 'Billing, Billing details, Clinical data (view access level details), Family'.

## 2 Click "First name (required)"

**Profile**

**Create an invitation**

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify. They must accept the invitation using the same email address.

1 Recipient — 2 Access Level — 3 Access Permissions

**Add recipient information**

First name (required)

Last name (required)

Email (required)

## 3 Enter email address, and confirm email address:

**Patient Portal**

**Create an invitation**

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify. They must accept the invitation using the same email address.

1 Recipient — 2 Access Level — 3 Access Permissions

**Add recipient information**

First name (required)

Last name (required)

Email (required)

Confirm email (required)

Relationship to patient (required)

Next

4 Click "Relationship to patient (required)"

Alexis

Last name (required)  
Nixdorf

Email (required)  
lexi.nixdorf@icloud.com

Confirm email (required)  
lexi.nixdorf@icloud.com

Relationship to patient (required)

Next

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5 Click "Family/Other"

Patient Portal

Abn zzzTest  
Birthdate: January 1, 1940  
Account options

Dashboard  
Appointments  
Billing  
Calendar  
Documents  
Health Record  
Health Tracker  
Medications

Alexis

Last name (required)  
Nixdorf

Relationship to patient (required)  
Dependent of Minor  
Dependent  
Employer  
Family/Other  
Father  
Foster Father  
Foster Mother

Next

## 6 Click "Next"

Abn zzzTest  
Birthdate: January 1, 1940  
Account options ▾

- Dashboard
- Appointments
- Billing
- Calendar
- Documents
- Health Record
- Health Tracker
- Medications
- Messages

First name: Alexis

Last name (required): Nixdorf

Email (required): [Redacted]

Confirm email (required): [Redacted]

Relationship to patient (required): Family/Other

**Next**

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## 7 Choose standard or view only access level, click next:

Create an invitation

Create an invitation for another person to access this Patient Portal by completing the form below. Please verify they must accept the invitation using the same email address.

Progress: 1 Recipient (checked) — 2 Access Level (highlighted) — 3 Access Permissions

[Back](#)

**Select access level**

Standard  
This user will be able to view information and perform actions as permitted.

View Only  
This user will be able to view information as permitted and submit payments. They will not be able to request a medication renewal, or scheduling an appointment, etc.

**Next**

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## 8 You can remove or add any permissions:

The screenshot shows a user interface for configuring access permissions. On the left is a sidebar with navigation options: Dashboard, Appointments, Billing, Calendar, Documents, Health Record, Health Tracker, Medications, and Messages. The main content area has a breadcrumb trail: Recipient (checked), Access Level (checked), and Access Permissions (3). Below the breadcrumb is a 'Back' button. The section is titled 'Select access permissions' and contains a list of permissions with checkboxes: Billing (checked), Billing details (checked), Clinical data (checked), Family history (checked), Download medical records (checked), and Profile (checked). A yellow circle highlights the 'Download medical records' checkbox. Below the list is a 'Next' button. A list of categories is shown: Allergies, Appointments, Care plan, Conditions, Health maintenance, Health summary, He Medical history, Medications, Messages, Questionnaires, Reports, Results, Scanned docum. At the bottom right, there is a copyright notice: Copyright © 2026 Medical Information Technology, Inc. (v6) and a link to Terms and conditions.

## 9 Click "Next"

This screenshot is identical to the previous one, but with a yellow circle highlighting the 'Next' button at the bottom of the permissions list. The 'Download medical records' checkbox is now unchecked, and the 'Next' button is highlighted in yellow.

10 Add a custom message if you would like, then click next:

Abn zzzTest  
Birthdate: January 1, 1940  
Account options ▾

- Dashboard
- Appointments
- Billing
- Calendar
- Documents
- Health Record
- Health Tracker
- Medications
- Messages

✓ Recipient    ✓ Access Level    ✓ Access Permissions

Back

Add a custom message to be sent with your invitation.

1000 characters allowed

Next

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11 Click "Submit"

Abn zzzTest  
Birthdate: January 1, 1940  
Account options ▾

- Dashboard
- Appointments
- Billing
- Calendar
- Documents
- Health Record
- Health Tracker
- Medications
- Messages

✓ Recipient    ✓ Access Level    ✓ Access Permissions

Back

**Please review and verify the information below.**  
If something is incorrect or missing, select Back and correct the information on the appropriate page.

**User information**  
Name                      Relationship                      Email  
Alexis Nixdorf              Family/Other                      lexi.nixdorf@icloud.com

**Custom message**  
Lexi, I am sharing my access so you can see my medical records. Please accept this invitation.

**Access level**  
Standard

**Access permissions**  
Billing, Billing details, Clinical data, Family history, Profile

Submit

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