Create profile on invitation of client

Manage a Professional Account · https://www.primaryrecord.com/docs/create-profile-on-invitation-of-client/

Feature stats: **Beta**
Changes may be made to the feature, and customers of Primary Record should choose to use the feature "as is" accepting that the service may change or be taken away.

Primary Record is fundamentally a record owned by the individual or legal representative for an individual. Those parties ultimately control who they share and collaborate within Primary Record.

Purpose of the feature

When engaging a professional care coordinator, individuals may be unable and willing to accept the invitation via email. However, the individual may wish for the care coordinator to do work on their behalf before the acceptance has been gathered. This feature allows coordinators to function with the assumption that the individual intends to accept their invitation to Primary Record formally.

Enable profile before acceptance.

1. Start from the **Client List screen** in the Professional application.
2. **Select the client** to invite.
3. Click the button at the top of the page labeled **"Invite Client"**.
4. In the Invitation modal on the right, **check the box** "Create Medical Profile Before Acceptance?".

Workflow considerations:

- **Acceptance:**
  Once clients accept, they own the profile and control access for professionals and other collaborators.
- **Rejection:**
  If the client rejects the invitation, No data is deleted if the invitation is rejected; the medical profile still exists. Instead, we remove all access to the profile. Access is granted back if the organization

re-invites the client.

- **Pending acceptance:**

  Professionals can add record resources like medications, conditions, visits, et al, with the exception of connecting to a patient portal. Patient Portal integrations are only enabled for accepted invitations.

- **Revoking Invitation:**

  If a professional revokes the invitation while the client's status is still pending acceptance, the profile and the data included will be deleted.