

Navigate My Account

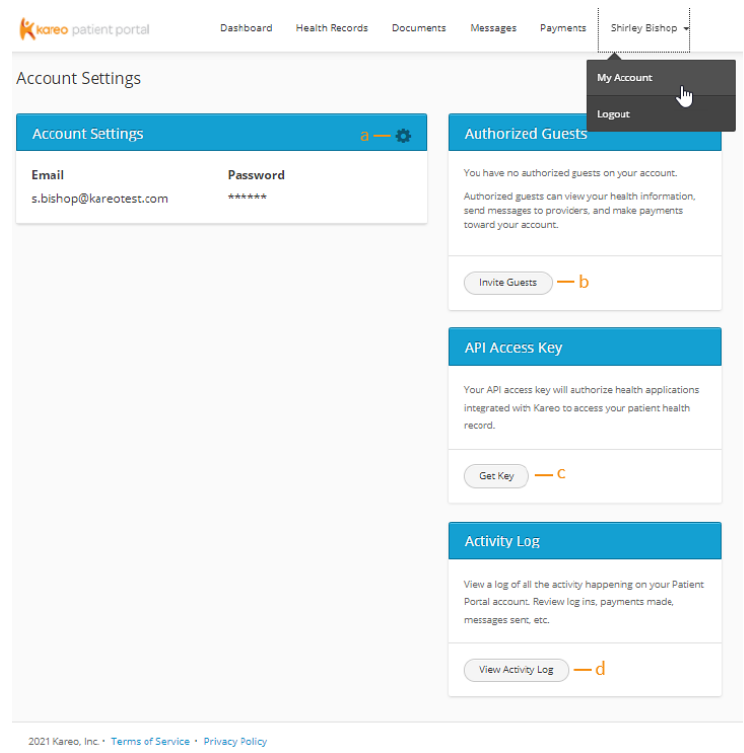
a. **Account Settings:** Displays the email address associated to the account. Click the **settings** icon to reset the password.

b. **Authorized Guests:** Click **Invite Guests** to allow authorized users to view the patient's health information, send messages, and make payments. To deny access to an authorized guest, click **Revoke** next to the guest's name.

Note: Authorized users do not have access to the *Account Settings* or *Authorized Guests* sections.

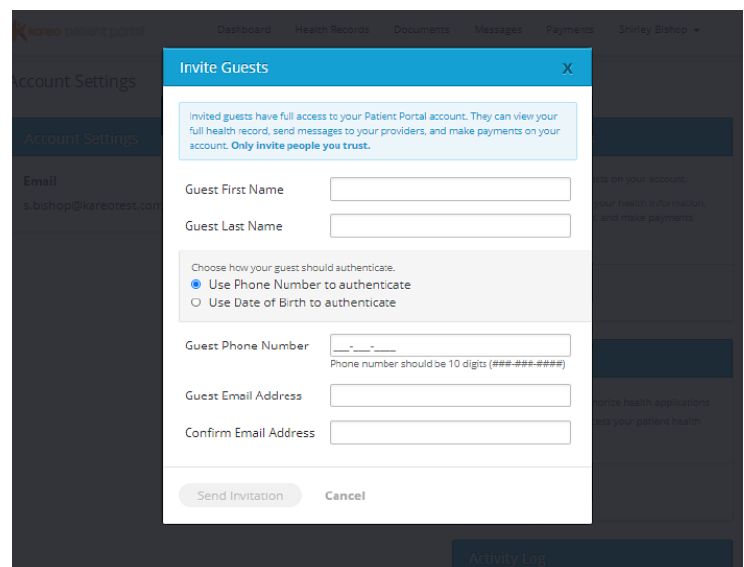
c. **API Access Key:** Click **Get Key** to generate the API access key that authorizes health applications to integrate with Kareo to access the patient's health record. To deny the generated API key, click **Revoke**. Then, click **Revoke Access** on the confirmation pop-up window.

d. **Activity Log:** Click **View Activity Log** to review log ins, payments made, messages sent, and more.



Invite Guests

1. Click **Invite Guests**. The *Invite Guest* pop-up window opens.
2. Enter the *Guest First* and *Last Name*.
3. Select how the guest authenticates.
4. Enter the *Guest Phone Number* or *Date of Birth* and *Email Address*.
5. Click **Send Invitation**. The confirmation pop-up window opens and an email invitation is sent to the invited guest.
6. Continue to add additional guests or click **I'm done** to close the pop-window.



Invited Guest: Authenticate and Access Account

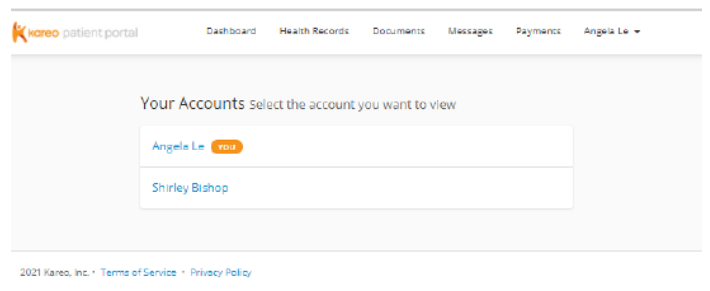
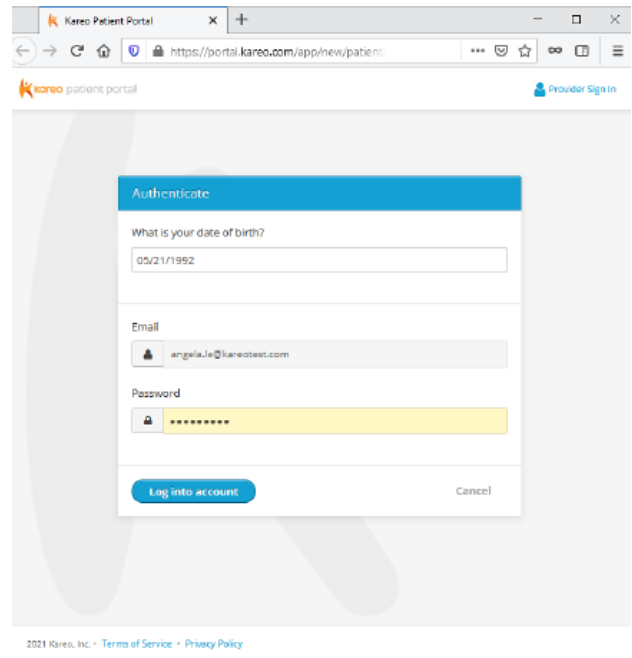
1. The guest receives an email invitation and click **Get Started**. The *Authenticate* page opens in a new browser.

2. The guest enters their phone number or date of birth for authentication and clicks **Log into account**. The *Your Accounts* page opens.

- If the guest does not have a *Patient Portal* account, create a password. Then, click **Create Account**. The *Your Accounts* page opens.

3. Select an account to view.

- If the guest has not been [invited to the Patient Portal](#) by a provider or practice, their name will not display on the list.



Invited Guest: Switch Users

There are multiple ways a guest can switch between users.

Note: If the guest has not been [invited to the Patient Portal](#) by a provider or practice, they will not have access to the options below.

- Click the **drop-down** to select a user.
- Click **Back to my account** to view their health information.
- Click **Patient Name** and select *Switch Users* to open the *Your Accounts* page.

