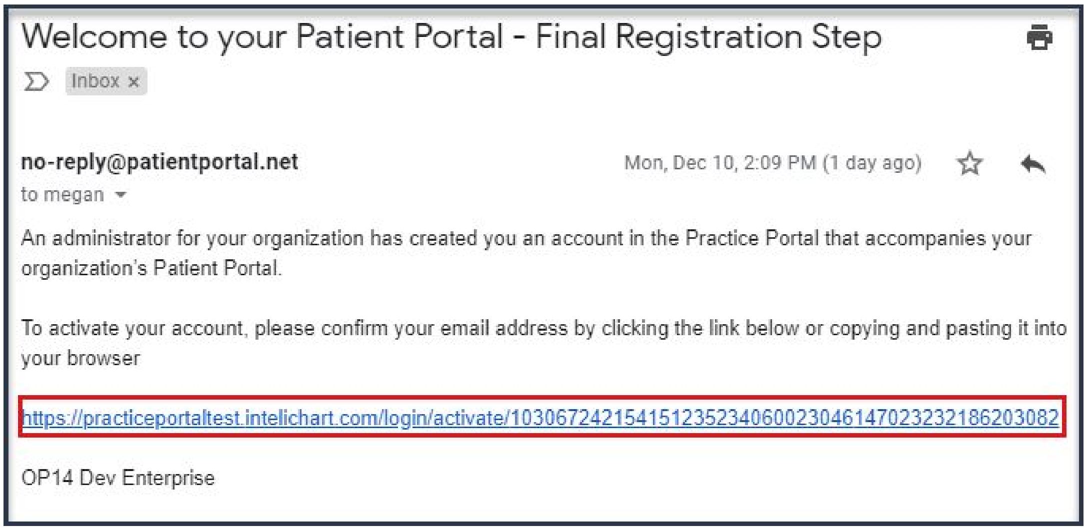
OP Notify: Practice Administrator

Activate Staff Account

1. Click the link in the email to activate the account.



2. The **Activate your account** window displays. Complete the following information:
   a. Enter a password in the **Password** field.
   b. Re-enter the password in the **Confirm Password** field.
   c. Complete the security question, click the dropdown arrow and select a question from the list.
   d. Type the answer to the selected security question in the field provided.
   e. Click the **Activate Account** button.

User Administration: Roles

Add a Role with Permissions to Build Events and Print Notification Reports

1. Log in with your Administrator login/password to the Patient Portal.

   Note: If the left panel is not expanded, click ≡ to expand.
2. At the top section of the window, click the dropdown and select the practice.

3. On the left panel, click **User Administration** and click **Roles**.
4. Click the **Add Role** button.
5. Verify the **Active** checkbox is selected.
6. Enter the name for the role in the **Name** field, example: **Front Desk**.
7. Optionally, add a description for the role in the **Description** field.

8. Select the following in the **Permissions** section:
    a. Click the expand **+** button for **Notify** and check **Build Event**. This gives the role permission to create events.
    b. Click the expand **+** button for **Reporting** and check **Notifications**. This gives the role permission for **Appointment Campaigns** used to print notification reports.
9. Click the **Save** button.

Duplicate a Role

1. Log in with your Administrator login/password to the Patient Portal.

    Note: If the left panel is not expanded, click ≡ to expand.
2. At the top section of the window, click the dropdown and select the practice.

3. On the left panel, click to expand **User Administration** and click **Roles**
4. In the center role panel, select the role to duplicate.
5. Click the **Duplicate Role** button.
6. Verify the **Active** checkbox is selected.
7. Enter the name of the role in the **Name** field.
8. Optionally, add a description for the role in the **Description** field.
9. Click the **Expand All** link in the **Permissions** group.
10. Scroll through the list of permissions and select or deselect to make necessary changes for the role.
11. Optionally, add a user to the role:
    a. Click the search field for **Add User** and begin typing the staff name to add.
    b. Select the user from the list.
    c. Click the **Select Practice/Facility** dropdown arrow and select the practice from the list.
    d. Click the **Add** button.
    e. Repeat the above steps for all users for the role.
12. Click the **Save** button.

User Administration: Staff Members

Add Staff

1. Log in with your Administrator login/password to the OP Notify Patient Portal.

    Note: If the left panel is not expanded, click ≡ to expand.
2. At the top section of the window, click the dropdown and select the practice.

3. On the left panel, click **User Administration** and click **Staff Members**.
4. Click the **Add Staff** button.
5. Verify the **Active** checkbox is selected.

6. Enter the email address of the new staff. This will be the staff member's login.
   Note: The email address must be unique for each staff member that will login into OP Notify.
7. Click the **Send confirmation email on** radio button and click the calendar to select a date.
8. Verify **User Type** is **Staff Member**.
9. Enter the staff member's name in the **Display Name** fields.
10. Leave the following fields blank: Biography, Phone and Photo.
11. Complete the **Staff Details**:
    a. Click the dropdown for **Associated Facility** and select the practice.
    b. Click the dropdown for the **Select Role** and select from the list. If the Role is not available, follow the instructions for adding a role above.
    c. If multiple facilities, click Add Associated Facility / Role and repeat the steps.
    d. Click the dropdown for **Default Facility**, and select the practice to default to when logging into OP Notify. (Required field).
    e. Add **Associated Users**:
       i. Highlight the staff located in the panel on the left.
       ii. Click the right arrow to move the selected staff to the panel on the right.
    f. Leave the following fields blank: Appointment Resources, Delegates and Permissions Sections.
12. Click the **Save** button.
    Note*:* The staff member will receive an email to activate their account. The email will be sent on the date entered in the **Send confirmation email on** field.

User Administration: Providers

Add Providers

1. Log in with your Administrator login/password to the Patient Portal.
   Note*:* If the left panel is not expanded, click ≡ to expand.
2. At the top section of the window, click the dropdown and select the practice.

3. On the left panel, click to expand **User Administration** and select **Providers**.
4. Click the **Add Provider** button.
5. Verify the **Active** checkbox is selected.
6. Enter the email address of the Provider. This will be the provider login.
7. Click the radio button **Send confirmation email manually**.
   Note*:* Confirmation email used to complete setup of an account. If the provider will need access to OP Notify, click the **Send confirmation email on** radio button and select today's date.
8. Verify the **User Type** is Provider.
9. Enter the Provider's name in the **Display Name** fields.
10. (Optional) Enter the phonetic spelling of the Provider's name:

   a. Enter the phonetic spelling of the Provider's name in the **First Name** and **Last Name** fields.
   b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based upon the phonetic spelling you've entered.
   c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.

   Note: The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.

11. Optionally, select the appropriate **Gender** radio button.
12. Leave the following fields blank: Biography, Specialty, Languages, Phone and Photo.
13. Complete the **Provider Details**:
    a. Click the dropdown for **Associated Facility** and select the Practice.
    b. Click the dropdown for the **Select Role** and select a role from the list.
    c. If multiple facilities, click the **Add Associated Facility / Role link** and repeat the steps.
    d. Click the dropdown for **Default Facility** and select the Practice. This is a required field.
    e. Add **Associated Users**
       i. Highlight the provider located in the panel on the left.
       ii. Click the right arrow to move the selected provider to the panel on the right.
    f. Verify **Appointment Requests** is checked for Appointment Resources.
    g. Leave the following fields blank: Participating Insurance Plans, Accepting New Patients and Permissions.
14. Click the **Save** button.

    Note: The provider will receive an email to activate their account. The email will be sent on the date entered in the **Send confirmation email on** field.

User Administration: Generic Providers

Add Generic Provider

Setting up OP Notify requires the creation of a Generic Provider. The Generic Provider is used for appointment reminders the Practice has scheduled for non-provider staff (such as, Nurse, Flu Clinic, or Lactation).

1. Log in to the Patient Portal with your Administrator login/password.

   Note: If the left panel is not expanded, click ≡ to expand.

2. At the top section of the window, click the dropdown and select the practice.

3. On the left panel, click to expand **User Administration** and select **Providers**.
4. Click the **Add Provider** button.
5. Verify the **Active** checkbox is selected.
6. Enter the email address of the Provider.

Note: It is a Best Practice to use the email address of the practice administrator using the format: [practiceadminemail+1]@[domain name]
Example: johnsmith+1@gmail.com.

7. Click the **Send confirmation email manually** radio button.
8. Verify the **User Type** is Provider.
9. Enter the Generic Provider's name in the **Display Name** fields.
   a. First name = Generic
   b. Last name = Provider
10. (Optional) Enter the phonetic spelling of the Provider's name:
    a. Enter the phonetic spelling of the Provider's name in the **First Name** and **Last Name** fields.
    b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based upon the phonetic spelling you've entered.
    c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.

    Note: The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.
11. Optionally, select a **Gender** radio button.
12. Leave the following fields blank: Biography, Specialty, Languages, Phone and Photo.
13. Complete the **Provider Details**:
    a. Click the dropdown for **Associated Facility** and select the Practice.
    b. Click the dropdown for the **Select Role** and select Front Desk.
    c. If multiple facilities, click the **Add Associated Facility / Role link** and repeat the steps.
    d. Click the dropdown for **Default Facility** and select the Practice. This is a required field.
    e. Add **Associated Users**:
       i. Highlight the provider, **[practicename] Generic Provider**, located in the panel on the left.
       ii. Click the right arrow to move the selected provider to the panel on the right.
    f. Verify **Appointment Requests** is checked for Appointment Resources.
    g. Leave the following fields blank: Participating Insurance Plans, Accepting New Patients and Permissions.
14. Click the **Save** button.

Staff Administration

1. To activate, deactivate or send a confirmation email to a staff member:
   a. Click the checkbox to the left of the staff name.
   b. Click the **Actions** dropdown arrow.
   c. Select from the list.
2. To filter the staff list by active and inactive staff:
   a. Click the **Show** dropdown arrow.
   b. Click the checkbox next to the type of staff to view, Active or Inactive.

Event Default Settings

11. Access OP Notify using the email address and password set up through your account activation.
12. On the left panel, click the arrow to expand the **PatientNOTIFY** group.

    Note: If the left panel is not expanded, click ≡ to expand, then click the **PatientNOTIFY** group.
13. Select **Settings**.
14. Specify the start and end times by clicking the **clock** icons for **Time Parameters**.
15. Set **Event Delivery Days** by selecting the checkbox for the days of the week the appointment reminder is sent.
    Note: It is a Best Practice to select all days. This will prevent reminders from being missed.
16. Enter the **Max Retries** by clicking the dropdown and selecting from the list.
    Note: It is a Best Practice to set the Max Retries to 2.
17. Enter the minutes between retry in the **Period Between Retries** field.
    Note: It is a Best Practice to set the time between retries be a minimum of 30 minutes.
18. Select **Vendor System** as the **Text Message Contact Preference**.
19. Click the **Save** button.