

OP Practice Portal

Patient Interface Configuration QRG

The instructions in this document are designed to be completed by the Practice Administrator. The information below will allow a practice to customize features of the OP Patient Portal and the parent/guardian/patient experience.

Logging in to Practice Portal

Log in to the Practice Portal

1. Enter your Administrator **login/password** to log in to the Practice Portal.
2. Select a **Practice** from the drop-down menu (optional, only required to switch to a different practice).

A screenshot of the Patient Portal login interface. On the left is the 'Patient PORTAL' logo with the tagline 'A HealthyOUTCOMES Solution'. On the right is a dropdown menu currently displaying 'Kressly Pediatrics, PC'.

Features of the Patient Interface

Selecting Portal Features

1. Access Portal Features: **Navigation Panel > Portal Management > Patient Interface > Manage Setup.**
2. Click the **ON/OFF** toggle button in the Active column to turn a portal feature on or off.
 - Available Features
 - Insurance Page
 - Show Lab Tests Page / Widget
 - Show Growth Chart
 - Allow Proxy Access
 - Allow Patient Configured Notifications
 - Show Pharmacies
 - Allow Referral Requests
 - Allow Appointment Requests
 - Allow Med Refill Requests
 - Allow Ability to Send Message
 - This includes the option: *Allow Self Registered Person to Send Message*. This option should remain **OFF** to prevent message failures.
 - Unavailable Features
 - Allow Form Requests

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Portal Features Definitions:

Feature	Description
Insurance Page	Displays the Insurance tab in the Patient Portal
Show Lab Tests Page / Widget	The Lab Tests widget is displayed on the patient's Home Page and the Labs page is displayed under the Labs navigation.
Show Growth Charts	When enabled, Growth Charts will be available from the patient chart.
Allow Proxy Access	Enables the Add Proxy link in the Patient Portal.
Allow Patient Configured Notifications	Turns on or off email notifications for patients that are registered on the Patient Portal: • Appointment Reminders (will display a generic notification 2 days prior to the appointment) • Cancel Appointment • Reschedule Appointment • New Medication • New Appointment • New Message
Show Pharmacies	Allows a pharmacy selection when requesting a medication refill. The pharmacy selection is independent of the pharmacy selection in OP.
Allow Referral Requests	When enabled, the Request a referral option is displayed on the patient's home page.
Allow Appointment Requests	When enabled, the Request an appointment option is displayed on the patient's home page.
Allow Med Refill Requests	When enabled, the Refill a medication option is displayed on the patient's home page.
Allow Patients to Send Message	When enabled, the Send a message option is displayed on the patient's home page. 1. Click Practice Name to set up the message display format. 2. Select a Message Display format.

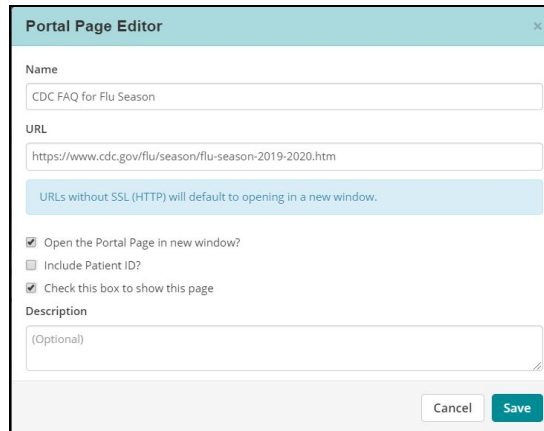
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Creating Links used within the Patient Portal

Additional Web content can be added as a link on the Patient Portal.

1. Access Portal Features: **Navigation Panel > Portal Management > Patient Interface > Manage Setup.**
2. Click **Add a Link** in the Portal Advanced Links section. The Portal Page Editor window is displayed.
3. Click the **Name** field and enter the **Name** of the link as it will be displayed on the Patient Portal.
4. Click the **URL** field and paste or enter the **URL** for the link.



The screenshot shows the 'Portal Page Editor' window. It has a light blue header with the title 'Portal Page Editor' and a close button. Below the header, there are several fields and checkboxes. The 'Name' field contains 'CDC FAQ for Flu Season'. The 'URL' field contains 'https://www.cdc.gov/flu/season/flu-season-2019-2020.htm'. Below the URL field, there is a light blue box with the text 'URLs without SSL (HTTP) will default to opening in a new window.' Below this, there are three checkboxes: 'Open the Portal Page in new window?' (checked), 'Include Patient ID?' (unchecked), and 'Check this box to show this page' (checked). Below the checkboxes is a 'Description' field with the placeholder text '(Optional)'. At the bottom right, there are 'Cancel' and 'Save' buttons.

5. Complete the below information.
 - **Open the Portal Page in new window?:** This is selected as the default and enables the page to open in a new window. If you do *not* want the page to open in a new window, deselect the box.
 - **Include Patient ID?:** Select this checkbox if you want the patient ID to be included.
 - **Check this box to show this page:** Select this checkbox if you want the page to be immediately active and displayed in the Patient Portal on the Home page.

Associating Terms and Conditions for Proxy Privilege

The Terms and Conditions for Proxy Privilege is used when a practice has enabled Allow Proxy Access. This feature allows a practice to upload a document that will be viewed by the Proxy on the Patient Portal.

1. Access Proxy Terms and Conditions: **Navigation Panel > Portal Management > Patient Interface > Manage Setup.**
2. Click the **Upload Terms and Conditions** button.
3. Navigate to the document on your computer, select the **file** and click the **Open button.**
4. Actions for the Proxy Terms and Conditions document:
 - **Click here to view uploaded document:** Select to view the uploaded document.
 - **Update:** Click the **Update** button if new or revised terms and conditions need to be uploaded.
 - **Remove:** Click the **Remove** button to remove the terms and conditions document.

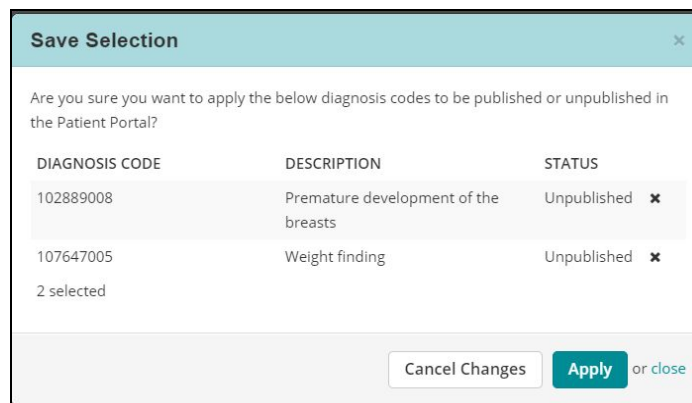
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Managing Visibility of Diagnosis Codes

The Diagnosis tab enables you to select which diagnoses you want to display in the Patient Portal on a patient's Problems list. All diagnosis codes will be selected to publish.

1. Access Diagnosis Codes: **Navigation Panel > Portal Management > Code Management > Diagnosis tab.**
The window displays the following information:
 - **Diagnosis Code:** This is the SNOMED code associated with a diagnosis from OP.
 - **Description:** The diagnosis description associated with the diagnosis code.
 - **Publish:** Checkbox indicating whether the diagnosis is published to the Patient Portal.
 - **Block diagnoses that have no associated diagnosis code:** The checkbox is selected by default. The checkbox indicates whether to publish codeless diagnoses to the Patient Portal.
2. Deselect the **checkbox** in the Publish column, to exclude the diagnosis from the Patient Portal.
3. Click **Save Settings** once you are finished making selections. The Save Selection window is displayed.
4. Click the **Apply** button.



Save Selection [X]

Are you sure you want to apply the below diagnosis codes to be published or unpublished in the Patient Portal?

DIAGNOSIS CODE	DESCRIPTION	STATUS
102889008	Premature development of the breasts	Unpublished ✕
107647005	Weight finding	Unpublished ✕

2 selected

Cancel Changes [Apply] or close

Managing Visibility of Lab Codes

The Labs tab enables you to select which labs you want to display in the Patient Portal on a patient's Labs Test list. All labs will be selected to publish.

1. Access Labs: **Navigation Panel > Portal Management > Code Management > Labs tab.**
The window displays the following information:
 - **Description:** The lab description which populates from OP.
 - **Publish:** Checkbox indicating whether the lab is published to the Patient Portal.
2. Deselect the **checkbox** in the Publish column, to exclude the lab test from the Patient Portal.
3. Click **Save Settings** once you are finished making selections. The Save Selection window is displayed.
4. Click the **Apply** button.

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Save Selection ×

Are you sure you want to apply the below lab results to be published or unpublished in the Patient Portal?

DESCRIPTION	STATUS	
Hemoglobin A1C	Unpublished	×

1 selected

Cancel Changes Apply or [close](#)