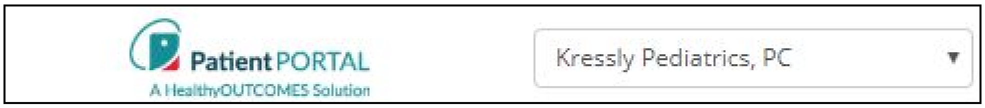
OP Practice Portal: Portal Configuration QRG

The instructions in this document are designed to be completed by the Practice Administrator. The first step is to activate your administrator account. The administrator account is created by the OP Implementation team and sent by email. Follow the instructions below once you have received the welcome email.

Logging into the Practice Portal

Logging in to the Practice Portal

1. Log in to the Practice Portal by entering your Administrator l**ogin/password** to the Practice Portal.
2. Select a **Practice** the radio button drop-down menu (optional, only required to switch to a different practice).



Configuring General Practice Settings

1. Navigate to the General Settings: **Navigation Panel > Portal Management > General Settings**.
2. Click **Change your logo** (optional) to select a practice logo.
   a. Click the **Change your logo** button.
   b. Navigate to the folder on your computer, select the **File** and click the **Open** button.
   c. Click the **Apply Changes** button.
   Note: The maximum pixel size is 225 X 50. It is recommended that the logo is a PNG file with a transparent background.
3. **Custom URL** (optional): Enter the **custom name** that directs users to the Patient Portal.
   Note: A patient can only be registered without a PIN when the practice has a custom URL and allows self-registration.
4. **Branding Color** (optional): Select from the color palette in the drop-down menu and click the **OK** button.
5. **Display Name** (optional): Click the **Display Name** field and enter changes. The display name is used on the patient portal and during self-registration.
6. **Enterprise PIN** (optional): Select the **Enterprise PIN** checkbox to enable the functionality of a single PIN login to multiple practices/facilities.
7. **Self Registration:** Select the **Self Registration** checkbox to enable self registration functionality for the selected practice. If deselected, patients must have a PIN to register.
   Note: Selecting Self Registration is only functional when the practice has also entered a Custom URL.
8. **Child/Associated Accounts**: This checkbox is selected as a standard with OP Patient Portal.
9. **Minor Age Limit:** The minor age limit is set to 18 as a standard with OP Patient Portal.
   Note: The minor age limit is the age at which a minor account can no longer be associated with an adult. The adult receives a message about the disassociation. The child must contact the practice to receive their own account.
10. Click the **Save** button.

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Configuring Practice Roles using Duplicate Feature

1. Navigate to the Roles window: **Navigation Panel > User Administration > Roles**
2. Select the **Role** to duplicate in the center role panel.
3. Click the **Duplicate Role** button.
4. Verify that the **Active** checkbox is selected.
5. Enter the **Name** of the role in the field.
6. Add a **Description** for the role in the field (optional).
7. Click the **Expand All** link in the Permissions group.
8. Scroll through the list of permissions and select or deselect to make necessary changes for the Role.
9. In the Members section, all users in the duplicated role are listed. To remove one or more users, select the **Checkbox** to the left of the name and select **Remove** from the Actions drop-down menu.
   Note: If the Role was duplicated from a Role created at the Enterprise level the Share this Role with all practices checkbox is selected. If the Role is specific to a practice, deselect the checkbox.
10. Add a user to the Role.
    a. Click the **Add User** field and enter the **Staff Name** to add.
    b. Select the **User** from the list.
    c. Click the **Add** button.
    d. Repeat the above steps for all users for the Role.
       Note: A Role may be associated with a user when the staff member is created.
11. Click the **Save** button.

Configure Practice Message Groups

Adding a Message Group

The Message Group functionality is used to set up groups to receive messages and requests from the Patient Portal and act upon them in OP.

1. Navigate to the Message Groups window: **Navigation Panel > User Administration > Message Groups**
2. Click the **Add New Message Group** button.
3. Verify that the **Active** checkbox is selected.
4. Enter the **Name** for the Message Group in the **Name** field, example: **Clinical Messages.**
5. Add a **Description** for the Message Group in the Description field (optional).
6. Select the **Portal Users** radio button in Group Defined By.
7. Select the **Staff** on the panel on the left and click the **Right Arrow** to move them to the panel on the right to add them to the Portal
   Note: You may use the **Ctrl key** on the keyboard to select multiple staff.
8. Select one or more **Locations** from the drop-down menu. This is where the Message Group will be available.
9. Select a **Category** from the drop-down menu.
   Note: You may only select one Category for each Message group. If you select more than one, Messages will not be sent.

10. Click the **Save Message Group** button.

Message Group Actions

1. To activate, deactivate or delete a Message Group:
   a. Select the **Checkbox** to the left of the Message Group Name.
   b. Select an **Action** from the drop-down menu above the message groups list.
   c. Click the **Apply** button.
2. To enable, disable, edit and delete a message group using action buttons:

	Button used to toggle the message group from enabled to disabled.
	Button used to edit the message group.
	Button used to delete the message group.