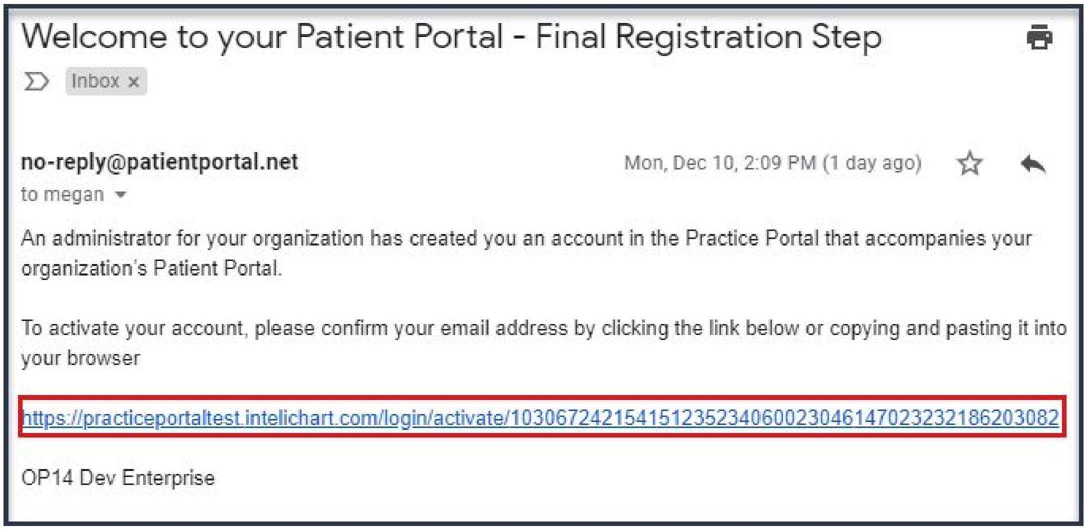
OP Notify: Practice Administrator

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:
   - Enter a password in the **Password** field.
   - Re-enter the password in the **Confirm Password** field.
   - Complete the security question, click the dropdown arrow and select a question from the list.
   - Type the answer to the selected security question in the field provided.
   - Click the **Activate Account** button.

Configuring Practice 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.
2. If multiple locations, click the dropdown and select the practice.

3. Navigate to the Roles window: **Navigation Panel > User Administration > 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, for example: **Front Desk**.
7. (Optional) Add a description of the role in the **Description** field.
8. Select the following in the **Permissions** section:
   - Click the expand **+** button for **Notify** and check **Build Event**. This gives the role permission to create events.
   - 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. Navigate to the Roles window: **Navigation Panel > User Administration > Roles**.
2. In the center role panel, select the role to duplicate.
3. Click the **Duplicate Role** button.
4. Verify the **Active** checkbox is selected.
5. Enter the name of the role in the **Name** field.
6. (Optional) Add a description of the role in the **Description** field.
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. (Optional) 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. 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.
10. Click the **Save** button.

Add Non-Clinical Staff for OP Notify

Complete the following steps to add staff members who have a clinical level of Non-clinical Staff in OP to the Practice Portal.

Adding New Non-Clinical Staff

1. Access Staff Administration: **Navigation Panel > User Admin > Staff Members**.
2. Click the **Add Staff** button.
3. Verify that the **Active** checkbox is selected.
4. Enter the **email address** of the new staff. This is the staff member's login.

   Note: The email address must be unique for each staff member that logs in to the Practice Portal.
5. Send the confirmation email, select from the following options:
   - **Send confirmation email now**: Sends the confirmation email when the staff member is saved.
   - **Send confirmation email on**: Click the calendar to select a date to send the confirmation email to the staff member. This option is helpful if the practice does not want the staff to have access immediately to the Practice Portal.
   - **Send confirmation email manually**: Select the staff member(s) from the staff list and choose the action to send the confirmation email. This option is helpful if the practice is unsure if a staff member will have access to the Practice Portal.
6. Verify that the **User Type** is **Staff Member**.
7. Enter the **staff member's name** in the Display Name fields.
8. Optional fields: Biography, Phone and Photo.

Completing the Staff Details

1. Click the dropdown for **Associated Facility** and select the practice.
2. 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.
3. If multiple facilities, click Add Associated Facility / Role and repeat the steps.
4. Click the dropdown for **Default Facility**, and select the practice to default to when logging into OP Notify. (Required field).
5. Add **Associated User**:
   a. Highlight the staff located in the panel on the left.
   b. Click the right arrow to move the selected staff to the panel on the right.
6. Leave the following fields blank: Appointment Resources, Delegates and Permissions Sections.
7. Click the **Save** button.
   Note*:* The staff member will receive an email to activate their account. If Send confirmation email manually was selected, no email will be sent to activate the account.

Add Clinical Staff for OP Notify

Complete the following steps to add staff members who have a clinical level of Clinical Staff or higher in OP to the Practice Portal.

Adding Clinical Staff

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. Enter the **email address** of the Clinical Staff member. This will be the staff member's login.
5. Send the confirmation email, select from the following options:
   - **Send confirmation email now**: Sends the confirmation email when the staff member is saved.
   - **Send confirmation email on**: Click the calendar to select a date to send the confirmation email to the staff member. This option is helpful if the practice does not want the staff to have access immediately to the Practice Portal.
   - **Send confirmation email manually**: Select the staff member(s) from the staff list and choose the action to send the confirmation email. This option is helpful if the practice is unsure if a staff member will have access to the Practice Portal.
6. Select the **Staff Member** radio button for **User Type**.
7. Enter the **Clinical Staff Member's name** in the Display Name fields.
8. Optional fields: Biography, Phone and Photo.

Completing the Clinical Staff Member Details

1. Click the dropdown for **Associated Facility** and select the practice.
2. 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.

3. If multiple facilities, click Add Associated Facility / Role and repeat the steps.
4. Click the dropdown for **Default Facility**, and select the practice to default to when logging into OP Notify. (Required field).
5. Add **Associated User**:
   a. Highlight the staff located in the panel on the left.
   b. Click the right arrow to move the selected staff to the panel on the right.
6. Deselect the **Appointment Requests** checkbox.
8. Click the **Save** button.
   Note*:* The staff member will receive an email to activate their account. If Send confirmation email manually was selected, no email will be sent to activate the account. Verify the clinical staff has been entered by navigating to User Administration > Staff Members.

Review Provider Entries

Your practice providers and a Generic Provider were added as part of the out-of-the-box configuration. However, because all provider information may not have been made available, it is important to review these entries to ensure all providers for your Practice have been added to the Portal.

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Review the Provider List on the left side of the window. If a provider is not listed, follow the steps in the *Add a Provider for OP Notify* section below, to add the provider. If the Generic Provider is not listed, follow the steps in the *Add a Generic Provider for OP Notify* section below.

Add Providers for OP Notify

Complete the following steps to add staff members who have a clinical level of Clinical Staff or higher in OP to the Practice Portal.

Adding a New Provider

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers.**
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. Enter the **email address** of the provider. This will be the provider login.
5. Select **Send confirmation email manually** radio button.
   Note*:* The confirmation email is used to complete the setup of a user's portal account. If the provider will need access to the Practice Portal, select the **Send confirmation email now** radio button or select the Send confirmation email on button and select a date.
6. Verify that the **User Type** is Provider.
7. Enter the **provider's name** in the Display Name fields.
8. (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 that you 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.
9. (Optional) Select the appropriate **Gender** radio button.
10. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.

Completing the Provider Details

1. Select the **Practice** from the **Associated Facility** drop-down menu.
2. Select a **Role** from the **Select Role** drop-down menu. If the Role is not available, follow the instructions found in this Quick Reference Guide for creating a role.
3. Click the **Add Associated Facility / Role** (optional) to add more than one facility. Select the **Practice** from the Associated Facility drop-down menu. Select a **Role** from the Select **Role** drop-down menu.
4. Select the **Practice Facility** from the Default Facility drop-down menu (required). This will be the default when you are logged in to the Practice Portal.
5. Add **Associated User**:
   a. Highlight the provider located in the panel on the left.
   b. Click the right arrow to move the selected provider to the panel on the right.
   Note: Each provider must only contain **one** Associated User.
6. Verify **Appointment Requests** is checked for Appointment Resources.
7. Leave the following fields blank: Participating Insurance Plans, Accepting New Patients and Permissions.
8. Click the **Save** button.
   Note: The provider will receive an email to activate their account. If Send confirmation email manually was selected, no email will be sent to activate the account.

Add a Generic Provider for OP Notify

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). The Generic Provider may already be available on your system, confirm the information

Adding a Generic Provider

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. 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.

5. Select **Send confirmation email manually** radio button.
6. Verify that the **User Type** is Provider.
7. Enter the Generic Provider's name in the **Display Name** fields.
   a. First name = Generic
   b. Last name = Provider
8. (Optional) Enter the **phonetic spelling** of the provider's name
9. (Optional) Select the appropriate **Gender** radio button.
10. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.

Additional Staff and Provider Administration Actions

To activate, deactivate or send a confirmation email to a staff member or provider:

1. Select the **checkbox** to the left of the user's name.
2. Click the **Actions** drop-down menu and select an action.
   - **Activate**: Select this action if a staff member or provider was deactivated and needs to be switched to an active status.
   - **Deactivate**: Select this action if a staff member or provider should no longer have access to the Practice Portal.
   - **Send Confirmation Email**: Select this action to resend a confirmation email to a staff member or provider who did not activate their account.
3. Select **Active** or **Inactive** from the Show drop-down menu to filter the staff list by active and inactive staff.

Configuring Event Default Settings

1. Navigate to Settings window: **Navigation Panel > PatientNOTIFY > Settings**.
2. Specify the start and end times by clicking the **clock** icons for **Time Parameters**.
3. 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.
4. 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.
5. 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.
6. Select **Vendor System** as the **Text Message Contact Preference**.
7. Click the **Save** button.