

The instructions in this document are designed to be completed by the Practice Administrator. The information below will allow a practice to customize features on the OP Patient Portal and the parent/guardian/patient experience. If the practice wishes to allow Document Requests to be made from the Patient Portal, confirm the Portal Feature of **Allow Document Requests** is set to **Active**.

Adding a Document Request Message Group

Create a Document Requests Message Group

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. For example: **Document Requests**.
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** in the panel on the left, and click the **Right Arrow** to move them to the panel on the right.
Note: You may use the **Ctrl key** on the keyboard and click 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 the **Category** of Documents Request 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.

Adding a Requestable Document

Add a Document that may be requested on the Patient Portal

1. Navigate to the Document Management window: **Navigation Panel > Portal Management > Patient Interface > Document Management tab**.
2. In the Document Requests section of the window, click the **Add a Requestable Document** button. The Create New Document Request window is displayed.
3. Complete the information:
 - **Name:** Enter the name as it will appear on the Patient Portal.
 - **Deliver To:** Click the drop-down arrow and select the message group to receive the Document Request.
4. Click the **Save** button.

Note: The Encounter Document Settings section located at the top of the Document Management window is **not** functional with OP. Users should not expect any changes made to this section to determine Visit Note sharing with the portal.