

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

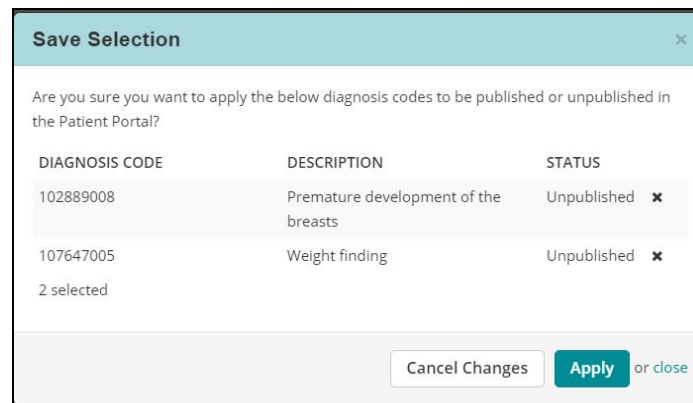
1. Enter your Administrator **login/password** to log in to the Practice Portal.
2. Select a **Practice** from the drop-down menu (optional, only required to switch to a different practice).



## 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.



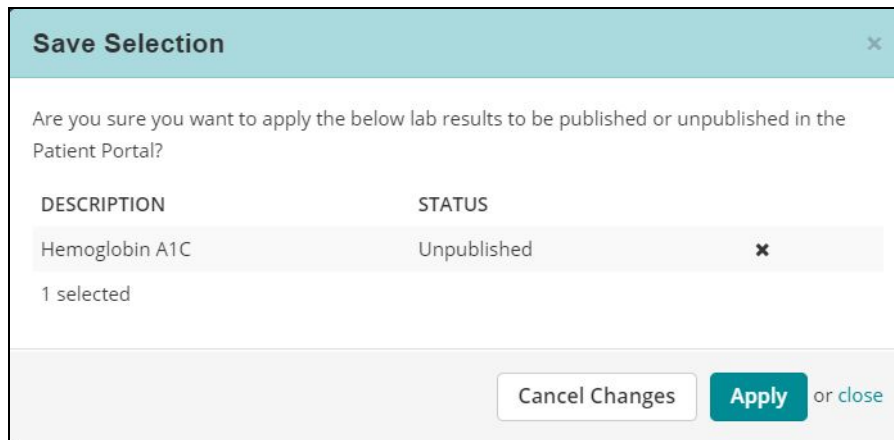
## Managing Visibility of Lab Codes

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.



The image shows a 'Save Selection' dialog box with a light blue header and a close button (x) in the top right corner. The main text asks, 'Are you sure you want to apply the below lab results to be published or unpublished in the Patient Portal?'. Below this is a table with two columns: 'DESCRIPTION' and 'STATUS'. A single row is visible with 'Hemoglobin A1C' in the description column and 'Unpublished' in the status column. To the right of the 'Unpublished' text is a small 'x' icon. Below the table, it says '1 selected'. At the bottom of the dialog, there are two buttons: 'Cancel Changes' and 'Apply or close'.

DESCRIPTION	STATUS
Hemoglobin A1C	Unpublished

## Managing Visibility of Appointments

The Appointment Types tab enables you to select which appointments you want to display in the Patient Portal.

1. Access Appointment Types: **Navigation Panel > Portal Management > Code Management > Appointment Types tab.**

The window displays the following information:

- **Description:** The appointment description which populates from OP.
  - **Publish:** Checkbox indicating whether the appointment type is published to the Patient Portal.
2. Deselect the **checkbox** in the Publish column, to exclude the appointment type 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.

# OP Practice Portal Code Management QRG

**Save Selection** ✕

Are you sure you want to apply these changes in the Patient Portal?

DESCRIPTION	STATUS	
EXTRA TIME WELL	Unpublished	✕

1 selected

or [close](#)