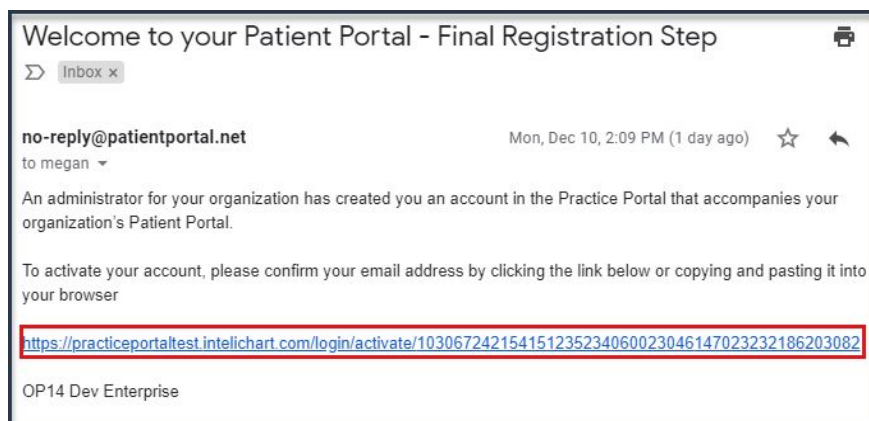# OP Practice Portal
Start Here Configuration QRG

Log in to Practice Portal

1. Click the **link** in the email to activate your account. The **Activate your account** window is displayed.

2. Enter the following information:
   a. Enter a **Password** in the field.
   b. Re-enter the **Password** in the Confirm Password field.
   c. Select a **Security Question** from the drop-down menu.
   d. Enter the **Answer** in the field.
   e. Click the **Activate Account** button.
3. Click the **Log into Practice Portal** button on the Account Activated window.
4. Enter your **user name** and **password**.
5. Click the **Login** button. The Practice Portal Dashboard is displayed.
6. Select a **Practice** from the drop-down menu (optional, only required to switch to a different practice).

Review Provider Entries

Your practice providers and locations 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 to the Practice Portal* section below, to add the provider.

Add a Provider to the Practice Portal
(if necessary, see previous section)

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. Select the appropriate **Gender** radio button (optional).
10. Optional fields: 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. Select the **Provider Name** in the left panel to add Associated Users.
    Note: Each provider must only contain **one** Associated User.
6. Click the **right arrow** to move the provider to the right panel.
7. Verify that **Appointment Requests** is selected for Appointment Resources.
8. Select a **Message Group** from the drop-down menu. If the Message Group is not available follow the instructions found in this Quick Reference Guide for adding one.
    Note: The Message Groups field may be left blank. The Message Group determines if a user will receive requests or messages in OP that were created from the Patient Portal.
9. Leave the Participating Insurance Plan deselected.
10. By default, the Accepting New Patients radio button will default to **No**. Select the **Yes** radio button if the practice will accept new patient registration on the OP Patient Portal.

11. **Data Sharing w/** defaults to Full Access. To change the selection, click the drop-down menu and select from the data sharing options listed below.
    ● **Full Access**: The provider shares all patient data with no restrictions.
    ● **Enterprise Only**: The provider shares patient data within the enterprise only.
    ● **Practice Only**: The provider shares patient data only within the practice.
    ● **No Access**: The provider does not share the patient data at any level.
12. Click the **Save** button.

Add Non-Clinical Staff to the Practice Portal

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. Select a **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 in the *OP Practice Portal: Portal Management Configuration QRG*.
3. If there are multiple facilities, click [Add Associated Facility / Role] and repeat the steps.
4. Select the **Practice Facility** from the Default Facility (required) drop-down menu. This is the default practice facility when you are logged in to the Practice Portal.
5. Add Associated User:
   a. Highlight the **staff name** located in the left panel.
   b. Click the **right arrow** to move the selected staff to the right panel.

Note: Each staff member must only contain **one** Associated User.

6. Select a **Message Group** from the drop-down menu. If the Message Group is not available follow the instructions in the *OP Practice Portal: Portal Management Configuration QRG*.
   Note: The Message Groups field may be left blank. The Message Groups determine if a user receives requests or messages in OP that were created from the Patient Portal.
   Note: Permissions are set by Role selected in the Associated Facility field.
7. Click the **Save** button.

Add Clinical Staff to the Practice Portal

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. Verify that the **User Type** is Provider.
7. Enter the **Clinical Staff Member's name** in the Display Name fields.

Completing the Clinical Staff Member 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 the user is logged in to the Practice Portal.
5. Add Associated User:
   a. Highlight the **staff name** located in the left panel.
   b. Click the **right arrow** to move the selected staff to the right panel.
6. Verify that **Appointment Requests** checkbox is not selected.

7. Select a **Message Group** from the drop-down menu. If the Message Group is not available follow the instructions found in this Quick Reference Guide for adding one.
Note: The Message Groups field may be left blank. The Message Group determines if a user will receive requests or messages in OP that were created from the Patient Portal.
8. Return to the **User Type** radio button located toward the top of the staff member's details.
9. Select the **Staff Member** radio button.
10. Click the **Save** button.

## 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.

Managing Communication Templates

Page Templates are used to customize the practice's notifications, reminders, disclaimers, etc. The portal is delivered with a collection of System Templates that may be used as a starting point for practices to create their own Practice Templates. All System Templates are available in an English and Spanish version. When a practice creates their own Practice Template in English, the Spanish translation must be entered manually for that template.
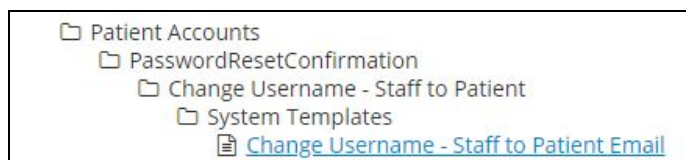
1. Access Page Templates: **Navigation Panel > Portal Management > Patient Interface > Page Templates**.
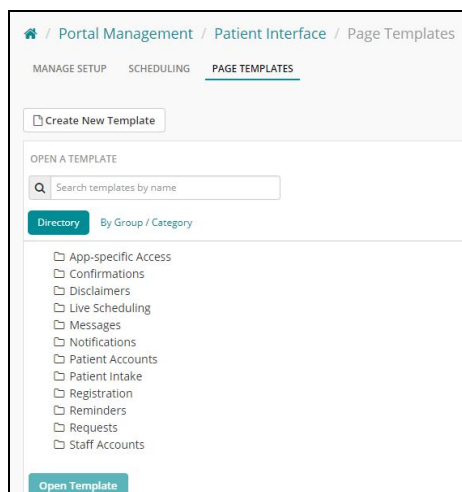
2. To modify an existing Template:
   a. Expand the folder list until you locate the Template.

   b. Click the **Template link** to open the Template.
   c. Click the **Copy Template** button.
   d. Complete the **Copy Template** window:
      i. **Name** (required): Enter the new **Template Name**.
         Note: It is recommended any template copied by the practice contain the practice name or identifying information, for example, ABC Peds-Change Username - Staff to Patient Email
      ii. **Description** (optional): May leave the original template Description or modify to match the Template Name.
      iii. Select the **Practice Default** checkbox.
      iv. Click the **Create New Template** button.
3. Edit the Subject line, as needed.
4. Edit the Text, as needed.
   Note: If applicable, click the **Spanish** tab, and edit the text to reflect the Spanish version of the text entered in the English tab.
5. Click the **Save** button.

Recommended templates to review:
   ● Confirmations
   ● Disclaimers: Appointments, Medication Refill, New Message, Referral Request
   ● Registration: Send Pin Email, Send Verification Question Email
   ● Reminders