June 8, 2021 Portal Tips & Tricks

CHADIS Articles on Teen and Teacher Workflows

Click here for best practice workflows for having teens complete confidential adolescent screens. To learn how to invite teachers to complete surveys read this OP Help Center article.

Assign Staff to Receive Portal Self-Registration Messages

If you enable the ability for parents and/or patients to self-register on the Patient Portal, you should make sure you have staff assigned to receive those self-registration messages in OP. If staff are not assigned to receive these messages they will all go to the user $AD. We encourage you to check messages for the $AD user to ensure every message has been addressed. To learn more, read this article and Quick Reference Guide found on the Help Center.

Data Withhold Dates

All practices who set a data withhold date should have received an email regarding updates that need to be made to this preference. If your practice did not receive the email, please reach out to skressley@officepracticum.com in order to plan your data remediation.