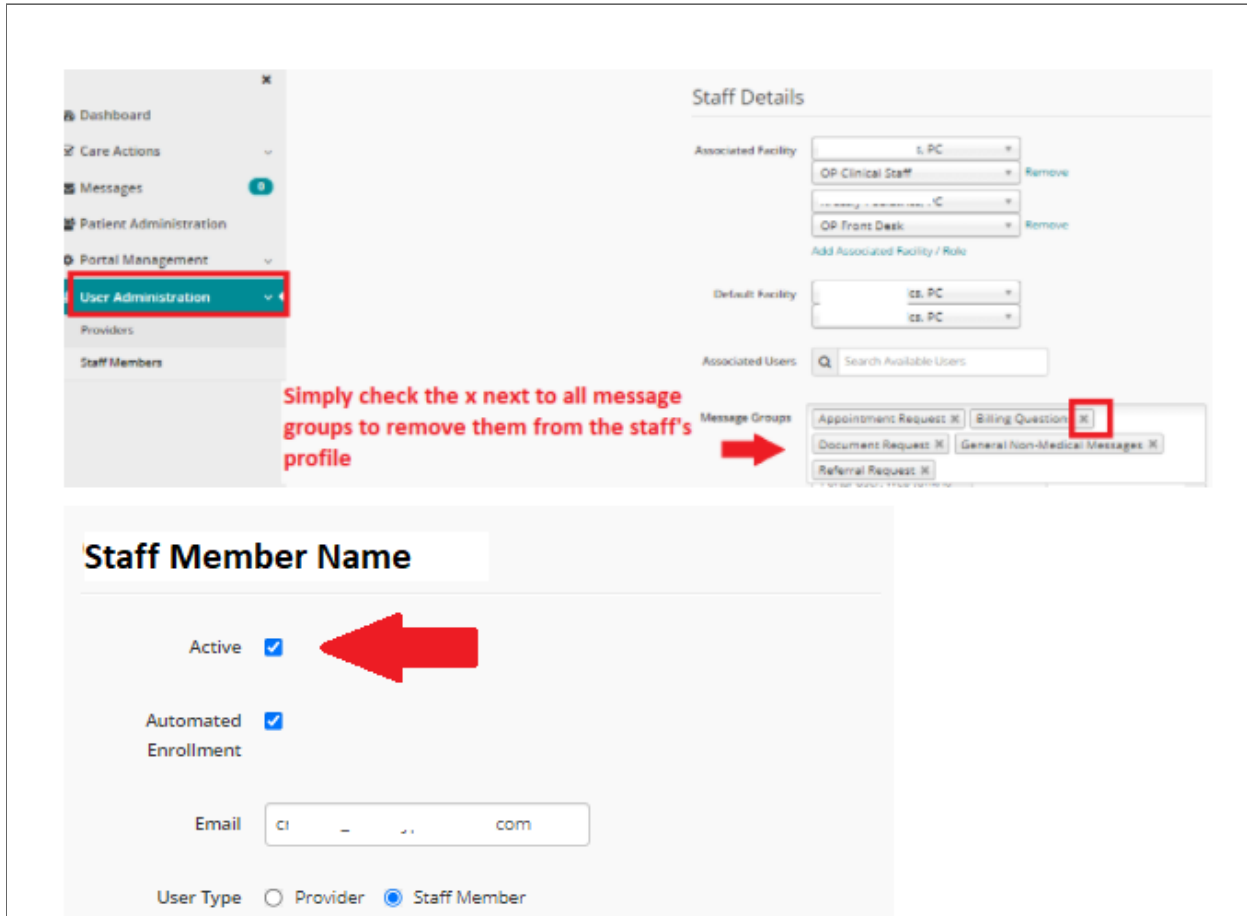


## July 15, 2021 Portal Tips & Tricks

### Staff leaving your Practice

If you have staff members who leave your practice, in addition to inactivating them in OP, make sure you remove them from all message groups in the IntelliChart Practice Administration portal and uncheck the Active flag under user administration.



The screenshot displays the IntelliChart Practice Administration portal interface. On the left, a navigation menu includes options like Dashboard, Care Actions, Messages, Patient Administration, Portal Management, and User Administration (highlighted with a red box). The main content area is titled 'Staff Details' and contains sections for Associated Facility, Default Facility, Associated Users, and Message Groups. A red arrow points from the 'Message Groups' section to the 'Staff Member Name' section below. In the 'Message Groups' section, several groups are listed with an 'X' icon next to them, indicating they can be removed. A red box highlights the 'X' icon next to the 'Billing Question' group. Below this, the 'Staff Member Name' section shows the 'Active' checkbox checked, with a red arrow pointing to it. Other settings include 'Automated Enrollment' (checked), 'Email' (with a text input field), and 'User Type' (with radio buttons for 'Provider' and 'Staff Member', where 'Staff Member' is selected).

Simply check the x next to all message groups to remove them from the staff's profile

Staff Details

Associated Facility: t. PC, OP Clinical Staff, OP Front Desk (Remove)

Default Facility: t. PC, t. PC

Associated Users: Search Available Users

Message Groups: Appointment Request X, Billing Question X, Document Request X, General Non-Medical Messages X, Referral Request X

Staff Member Name

Active ☒ Automated Enrollment ☒

Email: [Text Field] .com

User Type: ☐ Provider ☒ Staff Member