

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

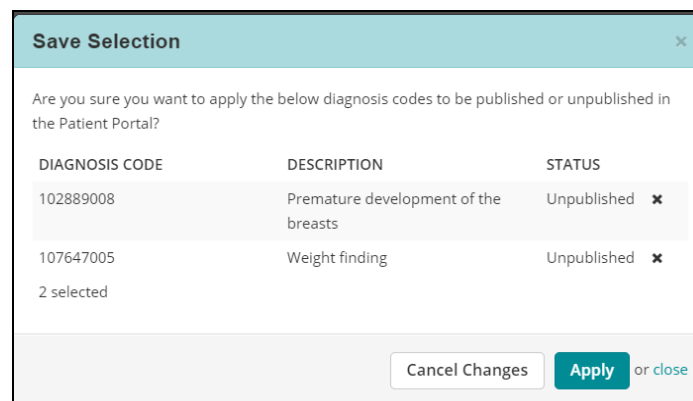
1. Enter your Administrator **login/password** to log in to the Practice Portal.
2. Select a **Practice** from the drop-down menu (optional, only required to switch to a different practice).



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.



DIAGNOSIS CODE	DESCRIPTION	STATUS
102889008	Premature development of the breasts	Unpublished ✕
107647005	Weight finding	Unpublished ✕

2 selected

Cancel Changes **Apply** or close

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.

Save Selection

Are you sure you want to apply the below lab results to be published or unpublished in the Patient Portal?

DESCRIPTION	STATUS
Hemoglobin A1C	Unpublished

1 selected

Cancel Changes

Apply or close

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.

Save Selection

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

DESCRIPTION	STATUS
EXTRA TIME WELL	Unpublished

1 selected

Cancel Changes

Apply or close

Managing Participating Insurance Plans (Payers)

The Payers tab allows you to select which Insurance Payers the Practice participates with and gives you the option to apply the selections to all Providers. Completion of this information makes for a better Provider Search, if that feature is enabled by the Practice.

- Access Payers: **Navigation Panel > Portal Management > Code Management > Payers tab**. The window displays the following information:
 - Payer:** The Payer Name which populates from OP.
 - Patient Friendly Name:** The Payer Name that will be displayed to parents/guardians searching your Practice's Providers in the Patient Portal. This should be something recognizable to a parent/guardian, such as a specific Plan Name as indicated on their insurance card.
 - (Optional)* **Payer ID:** The payer's ID number. This information is not passed to OP and is for your Practice's reference only.
 - Participating:** These checkboxes should be selected for the Payers that one or more of your Practice's Providers participate with. Selecting these checkboxes displays the Payer(s) in the Insurance drop-down on the Search for a Provider page in the Patient Portal.
- (Optional)* At the bottom of the page, below the Payer List, select the **Apply to all Providers** checkbox to apply the selected Participating Insurances to all Providers. This updates the Participating Insurance Plans section in each Provider's Practice Portal record.
- Click the **Save Settings** button.