

The instructions in this document are designed to be completed by the Practice Administrator. The first step is to activate your administrator account. The administrator account is created by the OP Implementation team and sent by email. Follow the instructions below once you have received the welcome email.

Logging into the Practice Portal

Logging in to the Practice Portal

1. Log in to the Practice Portal by entering your Administrator **login/password** to the Practice Portal.
2. *(Optional)* Select a **Practice** from the drop-down menu if you wish to switch to a different practice.



Configuring General Practice Settings

1. Navigate to General Settings: **Navigation Panel > Portal Management > General Settings.**
2. Complete the information on the General Setting window.
 - a. *(Optional)* Add a practice logo.
 - i. Click the **Change your logo** button.
 - ii. Navigate to the folder on your computer where the logo is saved, select the **File** and click the **Open** button.
 - iii. Click the **Apply Changes** button.

Note: The maximum pixel size is 225 X 50. It is recommended that the logo is a PNG file with a transparent background.
 - b. *(Optional)* **Custom URL:** Enter the **custom name** that directs users to the Patient Portal.

Note: A patient can only be registered without a PIN when the practice has a custom URL and allows self-registration.
 - c. *(Optional)* **Branding Color:** Select from the color palette in the drop-down menu and click the **OK** button.
 - d. *(Optional)* **Display Name:** Click the **Display Name** field and enter changes. The display name is used on the patient portal and during self-registration.
 - e. *(Optional)* **Participate in Enterprise PIN:** Select the checkbox to enable the functionality of a single PIN login to multiple practices/facilities. Participate in
 - f. *(Optional)* **Participate in Automated Enrollment:** Select the checkbox to enable an email to be sent to unregistered patients. The email is generated when an appointment is scheduled or a visit note is finalized.
 - f. **Self Registration:** Select the **Self Registration** checkbox to enable self-registration functionality for the selected Practice. If deselected, patients must have a PIN to register.

Note: Selecting Self Registration is only functional when the Practice has also entered a Custom URL.
 - g. **Require Address:** Select the checkbox to require address information when self registration is enabled.
 - h. **Time Zone:** Confirm the time zone selected for the Practice. To change, click the drop-down and select from the list.
 - i. **Observe daylight savings?:** Confirm the checkbox is selected if the Practice location observes daylight savings time.

- j. **Child/Associated Accounts:** This checkbox is selected as a standard with the OP Patient Portal.
 - k. **Minor Age Limit:** The minor age limit is set to 18 as a standard with OP Patient Portal.
Note: The minor age limit is the age at which a minor account can no longer be associated with an adult. The adult receives a message about the disassociation. The child must contact the Practice to receive their own account.
3. Click the **Save** button.

Configure Practice Roles using the Duplicate Feature

1. Navigate to the Roles window: **Navigation Panel > User Administration > Roles**.
2. Select the **Role** to duplicate in the Roles panel.
3. Click the **Duplicate Role** button.
4. Verify that the **Active** checkbox is selected.
5. Enter the **Name** of the role in the field.
6. *(Optional)* Add a **Description** for the role in the field.
7. Click the **Expand All** link in the Permissions group.
8. Scroll through the list of permissions and select or deselect to make necessary changes for the Role.
9. In the Members section, all users in the duplicated role are listed. To remove one or more users, select the **Checkbox** to the left of the name and select **Remove** from the Actions drop-down menu.
Note: Each member listed may also be removed by selecting Remove from the member line.
10. Add a user to the Role.
 - a. Click in to the **Add User** field and begin typing the **Staff Name** to add.
 - b. Select the user from the list.
 - c. Repeat the above steps for all users for the Role.
Note: A Role may be associated with a user when the staff member is created.
11. Click the **Save** button.

Configure Practice Message Groups

Adding a Message Group




The Message Group functionality is used to set up groups of staff and Providers to receive messages and requests from the Patient Portal and act upon them in OP.

1. Navigate to the Message Groups window: **Navigation Panel > User Administration > Message Groups**.
2. Click the **Add New Message Group** button.
3. Verify that the **Active** checkbox is selected.
4. Enter the name for the Message Group in the **Name** field, example: **Clinical Messages**.
5. *(Optional)* Add a description for the Message Group in the Description field.
6. Select the **Portal Users** radio button in Group Defined By.
7. To add a Staff Member or Provider to the Message Group:
 - a. Select the Staff Member or Provider on the panel on the left.

- b. Click the **right arrow** to move the Staff Member or Provider to the right panel.
Note: You may use the **Ctrl key** on the keyboard to select multiple staff.
8. Select a **Category** from the drop-down menu.
Note: You may only select one Category for each Message group. If you select more than one, Messages will not be sent.
9. Select one or more **Locations** from the drop-down menu. This is where the Message Group will be available.
10. Click the **Save Message Group** button.

Message Group Actions

1. To activate, deactivate or delete a Message Group:
 - a. Select the **Checkbox** to the left of the Message Group Name.
 - b. Select an **Action** from the drop-down menu above the message groups list.
 - c. Click the **Apply** button.
2. To enable, disable, edit and delete a message group using action buttons:

	Button used to toggle the message group from enabled to disabled.
	Button used to edit the message group.
	Button used to delete the message group.

(Optional) Configure Lab Results Delivered to the Patient Portal

A Practice has the ability to control when lab results are available to view by the parent/patient on the Patient Portal. The visibility of the labs on the Patient Portal is controlled by the Status of the Result and set up in the Practice Portal. Before beginning, confirm you have access to Care Actions Settings by navigating to **Navigation Panel > Portal Management > Care Actions Settings**.

Note: The Permission to view Care Actions Settings was assigned to the Portal Administrator.

Setting Lab Availability on the Patient Portal

1. Navigate to the Lab tab in Care Actions Settings: **Navigation Panel > Portal Management > Care Actions Settings > Labs tab**.
2. Use the below definitions to determine the selection in the Basic Lab Settings section.
 - **All Final Labs:** Lab results will be available on the Patient Portal when marked as Received.
 - **Only Final Signed Labs:** Lab results will be available on the Patient Portal when marked as Reviewed.
3. Click the **Save Settings** button.