OP Patient Portal: Portal Message Management

Message Management Overview

All correspondence made by the parent/guardian or patient from the Patient Portal is received as a message in OP. Practice staff that has been assigned to the corresponding departments in OP or Message groups in the Practice Portal (depending on the type of message) is alerted of a new message in the Unread Portal tab of the OP Message Center. **It is recommended to manage all portal messages in OP**, rather than the Practice Portal.

💡 **TIP**

Consider creating a Phrase Construction notebook that contains phrases that can be easily inserted into message responses. This alleviates the need to keep entering the same message response repeatedly.

Respond to a General Message in OP

General Messages are received in OP with the subject line that was entered by the sender, and the sender is identified as Web Portal User.

1. Navigate to the **Unread Portal** tab of the Message Center, and select the **Message** that you will respond to. The contents of the message are displayed in the lower section of the Message Center window.
2. Click the **Reply** button. The Message window is displayed with the To field already populated with Web Portal User.
3. Type your response in the Response field, or click the Phrase Construction button to add a selected phrase.
4. Click the **Send** button. Your response is sent to the patient/parent.

Respond to a Medication Refill Request

Medication Refill Requests are received in OP with the subject line of **Patient Portal Rx Refill**, and the sender is identified as Web Portal User (unless the message is forwarded by the original recipient of the message).

1. Navigate to the **Unread Portal** tab of the Message Center.

Note: If the message was forwarded from another OP user who triaged the message received form the portal, the message will be displayed in the **Unread Phone** tab of the Message Center.

2. Select and review the Medication Refill message. The details of the medication being requested and the requested pharmacy are displayed in the lower section of the Message Center window.

3. Depending on your role in the Practice, proceed with the appropriate option:
   - **Non-prescribers**: Click the **Forward** button to forward the message to an OP user who has the appropriate prescribing privileges. Be sure to select the **Include prior text** checkbox so that the original details of the message are included in the forwarded message.
     - The recipient will receive the Message in the **Unread Phone** tab of the OP Message Center and proceed with their normal prescribing workflow. They'll respond to you, the sender, who can then **Reply** to the message, removing the prescribing Provider in the To field and replacing the recipient with Web Portal User.
   - **Prescribers**: Click the **Reply** button and use the **Rx** button inside the message window to refill the prescription as you normally would from the Medication List window.

4. Click the **Send** button. Your response is sent to the Patient Portal.

Respond to an Appointment Request

Appointment Requests are received in OP with the subject line of *Appointment Request*, and the sender is identified as Web Portal User.

1. Navigate to the **Unread Portal** tab of the Message Center.
2. Select and review the Appointment Request message. The contents of the message are displayed in the lower section of the Message Center window.
3. Navigate to the Practice schedule, and schedule an appointment as you normally would.
4. Return to the Message Center window, and with the message selected, click the **Reply** button.
5. Enter your **response** in the Response field.
6. Click **Send** to respond to the Patient Portal.

Insurance Change Notification

When patients/parents send an Appointment Request, they are given the opportunity to notify the practice of new insurance information. These are displayed in the Message Center with the subject line of *Insurance Change Notification*.

1. Navigate to the **Unread Portal** tab of the Message Center.
2. Select and review the Insurance Change Notification message.
3. Navigate to the patient's chart, and update their insurance information as you normally would.
3. *(Optional)* Return to the Message Center window, and with the message selected, click the **Reply** button.
4. *(Optional)* Enter your **response** in the Response field.
5. *(Optional)* Click **Send** to respond to the Patient Portal.

Respond to a Referral Request

Referral Requests are received in OP with the subject line of **Patient Portal Referral**, and the sender identified as Web Portal User. Your Practice should follow their normal referral workflow to complete these requests.

1. Navigate to the **Unread Portal** tab of the Message Center.
2. Select and review the **Referral Request** message. The contents of the message are displayed in the lower section of the Message Center window.
3. Create the referral as you normally would. Or, forward the message to the correct OP user to handle the request, if necessary. The forwarded message will be displayed in the Unread Phone tab of the recipient's Message Center.
4. Once the request has been completed, return to the message and click the **Reply** button.
5. Enter your **response** in the Response field.
6. Click the **Send** button to respond to the Patient Portal.