

Course 1: Prepare OP for the Patient Portal

- 1 Staff and Provider Directory ☐
- 2 Patient Information ☐
- 3 Appt. Type Cleanup: Scheduled Appointments ☐
- 4 Appt. Type Cleanup: Visit Templates and Patient Chart Defaults ☐
- 5 Visibility Levels ☐
- 6 Complete Your Preparation ☐

Course 2: Log into and Navigate the Practice Portal

- 1 Validate Your Practice Portal Account, Log In ☐
- 2 Navigation Panel and Dashboard Overview ☐
- 3 Patient Administration ☐

Course 3: Portal Setup and Configuration

- 1 Roles and Message Groups ☐
- 2 Add Non-Clinical Staff ☐
- 3 Add Providers ☐
- 4 Add Clinical Staff ☐
- 5 Portal Mgmt: Locations, General Settings, and Setup ☐
- 6 Portal Mgmt: Advanced Links, Doc. Requests, Code Mgmt, Appt. Types ☐
- 7 Review and Modify Page Templates ☐

Course 4: Appt. Request, Live Scheduling Setup

- 1 Scheduling Setup in OP ☐
- 2 Scheduling Setup in the Practice Portal ☐

Course 5: Daily Portal Activities

- 1 View Portal Account Status, Generate PINs in OP ☐
- 2 View Portal Account Status, Generate PINs in the Practice Portal ☐
- 3 Respond to Messages in OP: Appointment and Refill Messages ☐
- 4 Respond to Messages in OP: Referral and General Messages ☐
- 5 Account Activities in the Practice Portal ☐

Course 6: Surveys

- 1 How, When Surveys Are Sent to the Patient Portal ☐
- 2 Task Surveys Not Associated With a Visit Template ☐
- 3 Rescore, Resend Surveys and Delete Survey Tasks ☐


Course 7: Documents


- 1 Review Request Setup, Set the Default Expiration Date ☐
- 2 Share Documents to the Patient Portal ☐

Course 8: Self-Registration

- 1 Setup to Enable Self-Registration, OP and Practice Portal ☐
- 2 Complete Self-Registration: Patient New to Practice ☐
- 3 Complete Self-Registration: Established Patient ☐

Instructions for use:

 **Practice Portal Administrator:** Circle the Lesson #s in each Course grouping to assign to the appropriate Team Members.

 **Practice Team Members:** Place a checkmark in each Lesson's corresponding checkbox as you complete your assigned learning.