OP Practice Portal
Patient Interface Configuration QRG

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These instructions 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 into Practice Portal

Log into 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).

Patient Interface: Portal Features

Enable Portal Features

1. Access Portal Features: **Navigation Panel > Portal Management > Patient Interface > Manage Setup**.
2. Click the **ON/OFF** toggle button in the Active column to turn a portal feature on or off.

Feature	Description
Insurance Page	Displays the Insurance tab in the Patient Portal.
Provider Search	Enables “Find a Provider” in the Patient Portal. Additional setup is recommended.
Allow Proxy Access	Enables the Add Proxy link in the Patient Portal.
Allow Patient Configured Notifications	When enabled, email notifications are sent 2 days prior to the appointment for patients that are registered for the Patient Portal. Click the arrow to view additional settings for notifications, and use the toggles

	to turn the notification on or off. • Cancel Appointment Notification • New Appointment Notification • New Medication Notification • New Message Notification • Reschedule Appointment Notification
Show Pharmacies	Allows a pharmacy selection when requesting a medication refill. The pharmacy selection is independent of the pharmacy selection in OP.
Allow Referral Requests	When enabled, the Request a Referral option is displayed on the patient's homepage.
Allow Appointment Requests	When enabled, the Request an Appointment option is displayed on the patient's homepage.
Allow Appointment Cancellations	When enabled, the Cancel link is available on upcoming appointments on the patient's homepage. Clicking the link will send a message to OP requesting to cancel an appointment.
Allow Appointment Rescheduling	When enabled, the Reschedule link is available on upcoming appointments on the patient's homepage. Clicking the link will send a message to OP requesting to reschedule the appointment.
Allow Med Refill Requests	When enabled, the Refill a Medication option is displayed on the patient's homepage. By default, there is no restriction set for allowing past medications to be refilled. Clicking No Restriction will allow you to set a time restriction.
Allow Ability to Send Message	When enabled, the Send a message option is displayed on the patient's homepage. 1. Click **Practice Name** to set up the message display format. 2. Select a **Message Display** format. Additional options are displayed when you click the arrow: • Allow Patient to Send Message • Allow Attachments • Allow Self Registered Person to Send Message (this option should remain **OFF** to prevent message failures).
Allow Document Requests	When enabled, the Request a Document section is visible in the Documents tab of the patient chart.
Allow Medical Record Request	When enabled, the Request Medical Records button is visible in My Chart > Summary in the Patient Portal. This feature requires additional setup to be completed in the Document Management tab of Patient Interface.

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Patient Interface: Patient Chart

Display Patient Chart Elements

This section of the Patient Interface allows Practices to toggle sections of the patient chart to be visible on the Patient Portal.

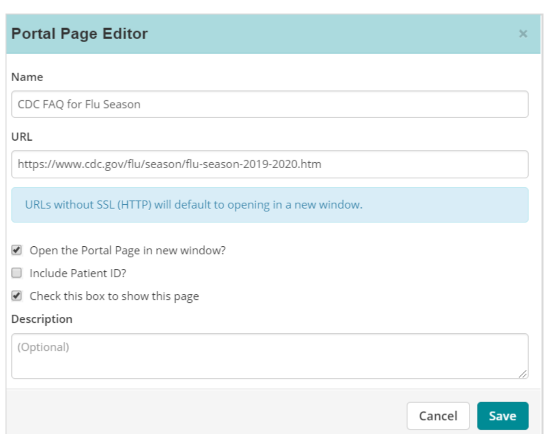
1. Access Patient Chart Features: **Navigation Panel > Portal Management > Patient Interface > Manage Setup**.
2. Navigate to the Patient Chart group, click the **ON/OFF** toggle button in the Active column to turn a patient chart element on or off. The Available Elements are:
    - Show Medications Page
    - Show Labs Page
    - Show Histories Page
    - Show Allergies Page
    - Show Visits Page
    - Show Immunizations Page
    - Show Problems Page
    - Show Vitals Page
    - Show Growth Chart Page
    - Show Documents Page

Patient Interface: Other Features

Create Links used within the Patient Portal

Additional Web content can be added as a link on the Patient Portal.

1. Access Portal Features: **Navigation Panel > Portal Management > Patient Interface > Manage Setup**.
2. Click **Add a Link** in the Portal Advanced Links section. The Portal Page Editor window is displayed.
3. Click the **Name** field and enter the **Name** of the link as it will be displayed on the Patient Portal.
4. Click the **URL** field and paste or enter the **URL** for the link. The URL field has a character limit of 512 characters.



5. Complete the below information.
   - **Open the Portal Page in new window?**: This is selected as the default and enables the page to open in a new window. If you do *not* want the page to open in a new window, deselect the box.
   - **Include Patient ID?**: Select this checkbox if you want the patient ID to be included.
   - **Check this box to show this page**: Select this checkbox if you want the page to be immediately active and displayed in the Patient Portal on the homepage.

Associate Terms and Conditions for Proxy Privilege

The Terms and Conditions for Proxy Privilege is used when a Practice has enabled Allow Proxy Access. This feature allows a Practice to upload a document that will be viewed by the Proxy on the Patient Portal.

1. Access Proxy Terms and Conditions: **Navigation Panel > Portal Management > Patient Interface > Manage Setup**.
2. Click the **Upload Terms and Conditions** button.
3. Navigate to the document on your computer, select the **file**, and click the **Open** button.
4. Actions for the Proxy Terms and Conditions document:
   - **Click here to view uploaded document**: Select to view the uploaded document.
   - **Update**: Click the **Update** button if new or revised terms and conditions need to be uploaded.
   - **Remove**: Click the **Remove** button to remove the terms and conditions document.