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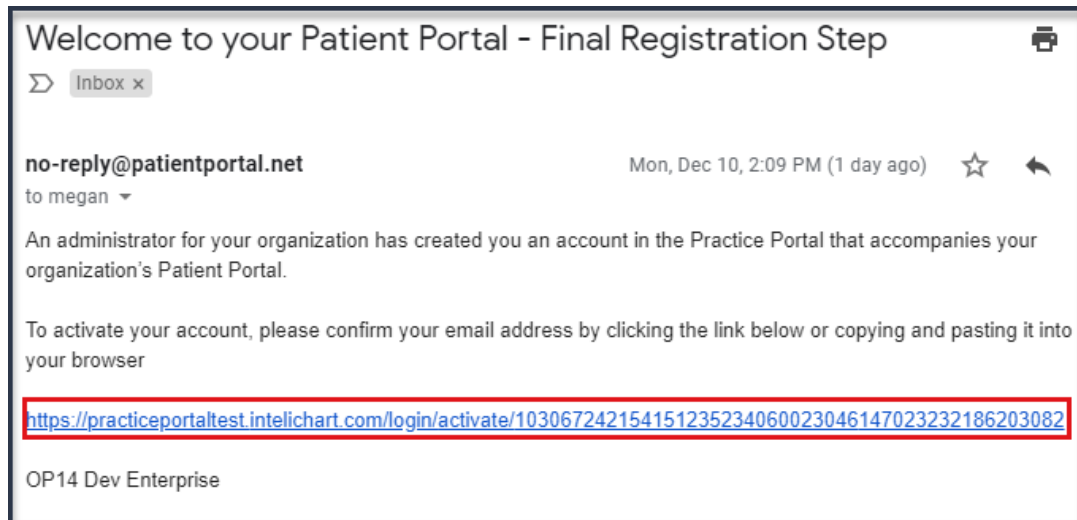
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Activate Staff Account

As staff is added to the Practice Portal, they'll receive account activation emails if you choose to send it while creating their account.

1. Click the link in the email to activate the account.



2. Complete the following information in the **Activate your account** window:
 - a. Enter a password in the **Password** field.
 - b. Re-enter the password in the **Confirm Password** field.
 - c. Click the **Security Question** drop-down and select a question from the list.
 - d. Type the **Answer** to the selected security question in the field provided.
 - e. Click the **Activate Account** button.

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Configure Practice Roles

As part of your Practice's out-of-the-box Role configuration, a Front Desk Role was created that includes the permissions needed to build Notify Events and access Notification Reports. The steps below should be used if you need to create another similar Role.

Patient Notify
Build Event
Appointment Reminder
Appointment Resource Token
On Demand Notification
Reporting
Notifications
Patient Notify

Duplicate a Role

1. Navigate to the Roles window: **Navigation Panel > User Administration > Roles**.
2. In the list of Roles in the left panel of the window, select the Role to duplicate.
3. Click the **Duplicate Role** button.
4. Verify the **Active** checkbox is selected.
5. In the **Name** field, enter the name for the Role.
6. (Optional) In the **Description** field, enter a description of the Role.
7. In the **Permissions** section, click **Expand All**.
8. Scroll through the list of permissions and select or deselect checkboxes to make necessary changes for the Role.
9. (Optional) Add a user to the Role:
 - a. In the Members section, click in the **Add User** search field and begin typing the name of the staff member to add.
 - b. Click to select the user.
 - c. Repeat the above steps for all users for the role.
10. Click the **Save** button.

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Add Non-Clinical Staff for OP Notify

Complete the following steps to add staff members who have a Clinical Level of Non-clinical Staff in OP to the Practice Portal.

Add New Non-Clinical Staff

1. Access Staff Administration: **Navigation Panel > User Admin > Staff Members**.

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2. Click the **Add Staff** button.
3. Verify that the **Active** checkbox is selected.
4. In the **Email** field, enter the **email address** of the staff member. This is the staff member's login.
Note: The email address must be unique for each staff member that logs in to the Practice Portal.
5. Send the confirmation email, select from the following options:
 - **Send confirmation email now:** Sends the confirmation email when the staff member is saved.
 - **Send confirmation email on:** Click the calendar to select a date to send the confirmation email to the staff member. This option is helpful if the practice does not want the staff to have access immediately to the Practice Portal.
 - **Send confirmation email manually:** Select the staff member(s) from the staff list and choose the action to send the confirmation email. This option is helpful if the practice is unsure if a staff member will have access to the Practice Portal.
6. Verify that the **User Type** is **Staff Member**.
7. Enter the **staff member's name** in the Display Name fields.
8. *(Optional)* Complete the Biography, Phone, and Photo fields.

Complete the Staff Details

1. Click the **Associated Facility** drop-down and select the **Practice**.
2. Click the **--Select Role--** drop-down and select a **Role**. If the appropriate Role is not available, follow the instructions in the [Configure Practice Roles](#) section above to create the Role.
3. If the user needs to be associated with multiple facilities, click **Add Associated Facility / Role** and repeat the previous steps.
4. *(Required)* Click the **Default Facility** drop-down and select the Practice to default to when logging into OP Notify.
5. **Add Associated User:**
 - a. Click to select the staff member located in the panel on the left.
 - b. Click the right arrow to move the selected staff to the panel on the right.
6. Click the **Save** button.
Note: The staff member will receive an email to activate their account. If Send confirmation email manually was selected, no email will be sent to activate the account.

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Add Clinical Staff for OP Notify

Complete the following steps to add staff members who have a Clinical Level of Clinical Staff in OP to the Practice Portal.

Add Clinical Staff

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. In the **Email** field, enter the **email address** of the staff member This is the staff member's login.

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Note: The email address must be unique for each staff member that logs in to the Practice Portal.

5. Send the confirmation email, select from the following options:
 - **Send confirmation email now:** Sends the confirmation email when the staff member is saved.
 - **Send confirmation email on:** Click the calendar to select a date to send the confirmation email to the staff member. This option is helpful if the practice does not want the staff to have access immediately to the Practice Portal.
 - **Send confirmation email manually:** Select the staff member(s) from the staff list and choose the action to send the confirmation email. This option is helpful if the practice is unsure if a staff member will have access to the Practice Portal.
6. For User Type, select the **Staff Member** radio button.
7. Enter the **staff member's name** in the Display Name fields.
8. *(Optional)* Complete the Biography, Phone, and Photo fields.

Complete the Clinical Staff Member's Details

1. Click the **Associated Facility** drop-down and select the Practice.
2. Click the **--Select Role--** drop-down and select a Role. If the appropriate Role is not available, follow the instructions in the [Configure Practice Roles](#) section above to create the Role.
3. If the user needs to be associated with multiple facilities, click **Add Associated Facility / Role** and repeat the previous steps.
4. *(Required)* Click the **Default Facility** drop-down and select the Practice to default to when logging into OP Notify.
5. Add **Associated User**:
 - a. Click to select the staff member located in the panel on the left.
 - b. Click the right arrow to move the selected staff to the panel on the right.
6. Click the **Save** button.

Note: The staff member will receive an email to activate their account. If **Send confirmation email manually** was selected, no email will be sent to activate the account. Verify the clinical staff has been entered by navigating to **User Administration > Staff Members**.

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Review Provider Entries

Your Practice Providers and a Generic Provider were added as part of the out-of-the-box configuration. However, because all Provider information may not have been made available, it is important to review these entries to ensure all Providers for your Practice have been added to the Portal.

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Review the Provider List on the left side of the window. If a Provider is not listed, follow the steps in the [Add a Provider for OP Notify](#) section below, to add the Provider. If the Generic Provider is not listed, follow the steps in the [Add a Generic Provider for OP Notify](#) section below.

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Add a Provider to OP Notify

Complete the following steps to add staff members who have a Provider Clinical Level in OP to the Practice Portal.

Add a New Provider

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. In the **Email** field, enter the **email address** of the Provider. This is the Provider's login.
Note: The email address must be unique for each staff member that logs in to the Practice Portal.
5. Select the **Send confirmation email manually** radio button.
Note: The confirmation email is used to complete the setup of a user's portal account. If the Provider will need access to the Practice Portal, select the **Send confirmation email now** radio button or select the **Send confirmation email on** radio button and enter a date.
6. Verify that the **User Type** is Provider.
7. Enter the **Provider's name** in the Display Name fields.
8. (Optional) Enter the **phonetic spelling** of the Provider's name to ensure clear pronunciation in Reminder Messages:
 - a. Enter the **phonetic spelling** of the Provider's name in the **First Name** and **Last Name** fields.
 - b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based on the phonetic spelling that you entered. If needed, adjust the phonetic spelling until the playback pronounces the Provider's name correctly.
 - c. In the **Custom Name** field, enter the Provider's name that may be more recognizable to patients. This is similar to the Colloquial Name in the OP Staff Directory. **Example:** If Dr. John Doe is known to patients as Dr. Jack, that is the Custom Name.
 - d. In the **Phonetic Custom Name** fields, enter the phonetic spelling of the Provider's Custom Name.
 - e. Click the **Play** button to hear the Custom Name according to the phonetic spelling. Adjust as needed.
9. (Optional) Select the appropriate **Gender** radio button.
10. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.

Complete the Provider Details

1. Click the **Associated Facility** drop-down and select the Practice.
2. Click the **--Select Role--** drop-down and select a Role. If the appropriate Role is not available, follow the instructions in the [Configure Practice Roles](#) section above to create the Role.
3. If the user needs to be associated with multiple facilities, click **Add Associated Facility / Role** and repeat the previous steps.
4. (Required) Click the **Default Facility** drop-down and select the Practice to default to when logging into OP Notify.
5. Add **Associated User**:
 - a. Click to select the Provider located in the panel on the left.
 - b. Click the right arrow to move the Provider to the panel on the right.**Note:** Each Provider must only contain **one** Associated User.

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6. Leave the following fields blank: Participating Insurance Plans, Accepting New Patients, and Permissions.
7. Click the **Save** button.

Note: If **Send confirmation email manually** was selected, no email will be sent to activate the account.

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Add a Generic Provider to OP Notify

If the Generic Provider is not already listed in the list of Providers, follow the steps below to add. If it is listed, follow the steps below to review the information. The Generic Provider is used to send Reminders for appointments that are scheduled with non-provider staff, such as for Nurse or Lactation Visits.

Add a Generic Provider

1. Navigate to the Provider Administration window: **Navigation Panel > User Administration > Providers**.
2. Click the **Add Provider** button.
3. Verify that the **Active** checkbox is selected.
4. In the **Email** field, enter the **email address** of the Provider.
Note: For this "Provider", it is Best Practice to use the email address of the Practice Administrator using the format: [practiceadminemail+1]@[domain name]. Example: johnsmith+1@gmail.com.
5. Select the **Send confirmation email manually** radio button.
6. Verify that the **User Type** is Provider.
7. Enter the Generic Provider's name in the **Display Name** fields.
 - First name = Generic
 - Last name = Provider
8. *(Optional)* Enter the **phonetic spelling** of the Provider's name.
9. *(Optional)* Select the appropriate **Gender** radio button.
10. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.

Complete the Provider Details

1. Click the **Associated Facility** drop-down and select the Practice.
2. Click the **--Select Role--** drop-down and select a Role. If the appropriate Role is not available, follow the instructions in the [Configure Practice Roles](#) section above to create the Role.
3. If the user needs to be associated with multiple facilities, click **Add Associated Facility / Role** and repeat the previous steps.
4. *(Required)* Click the **Default Facility** drop-down and select the Practice to default to when logging into OP Notify.
5. **Add Associated User:**
 - a. Click to select the Provider located in the panel on the left.
 - b. Click the right arrow to move the Provider to the panel on the right.**Note:** Each Provider must only contain **one** Associated User.
6. Leave the following fields blank: Participating Insurance Plans, Accepting New Patients, and Permissions.
7. Click the **Save** button.

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Additional Staff and Provider Administration Actions

After a staff member or Provider has been added to the Practice Portal, the Practice Administrator can deactivate staff, activate staff, or send/resend a confirmation email.

1. Navigate to Staff or Provider Administration, depending on the type of user: **Navigation Panel > User Administration > Providers or Staff Members**.
2. Select the **checkbox** to the left of the user's name in the panel on the left.
3. Click the **Actions** drop-down menu and select an action.
 - **Activate**: Select this action if a staff member or Provider was deactivated and needs to be switched to an active status.
 - **Deactivate**: Select this action if a staff member or Provider should no longer have access to the Practice Portal.
 - **Send Confirmation Email**: Select this action to send or resend a confirmation email to a staff member or Provider who did not activate their account.

To filter the list to see staff or providers based on their status, click the **Actions** drop-down and select **Active** or **Inactive** to filter the list.

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Configure Notify Event Default Settings

Some default settings can be set so that certain fields auto-populate for you as you're creating Reminder Events.

1. Navigate to the Notify Settings window: **Navigation Panel > Patient Notify > Settings**.
2. Set the **Time Parameters** by specifying the start and end times using the **clock** buttons.
3. Set the **Event Delivery Days** by selecting the checkbox for the days of the week that Appointment Reminders are sent.

Note: It is Best Practice to select all days to prevent Reminders from being missed.
4. Complete the **Calls** defaults:
 - a. Click in the **Max Retries** field and use the drop-down to select from the list.

Note: Best Practice is to set the Max Retries to 2.
 - b. Click the **Retry Minutes** drop-down and select the number of minutes between retries.

Note: Best Practice is to set the time between retries to 30 minutes.
5. In the Text Messages section, select **Vendor System** as the **Text Message Contact Preference**.
6. Click the **Save** button.

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