



## This Spring, Flourish with OP | OP Client Newsletter Spring 2023

Welcome back to the Spring 2023 edition of the OP Client Newsletter. Our product team has wasted no time springing into action this year, delivering highly-requested functionality and quality of life updates in our most recent release, and this newsletter is coming packed with the highlights. In addition to these great improvements, keep reading to find new AAP resources, a new survey from our product team, and some exciting news from our support team.

### ENGAGE 23

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The entire OP family is positively *blooming* with excitement to see you in person at **Engage 2023** - our first in-person conference since 2019! With a keynote by incoming AAP President Dr. Sandy Chung, over 100 educational sessions, and the chance to connect face-to-face with hundreds of your peers, there is *so much to look forward to* and we can't wait to *see you there!*

## PRODUCT NEWS

### Recent Release Highlights

The **OP 21.1.4 release** is chock-full of fantastic enhancements and refinements, and look out for new icons that help direct you through the notes:

|                           |                       |              |                         |
|---------------------------|-----------------------|--------------|-------------------------|
| Look out for these icons! |                       |              |                         |
|                           | Less Clicks Campaign! | Major Update | You asked, we listened! |

On top of the improvements you're about to read through in this section, the team has also completed some behind-the-scenes work to help streamline processing time and reduce errors, leading to better performance. There were so many great enhancements in this most recent release, we can't fit them all here - please be sure to [check out the release notes for full details!](#)

### But first... We are once again asking for feedback from your clinical team!

Our product team is developing a Check-In application that will allow patients and parents to fill out surveys and forms before their appointment. As such, they are looking to understand which Surveys and Forms your office uses the most, so they can ensure those are made available first, then build on additional options from there as the solution is developed. Thank you to our clinical users who take the time to [complete this 2-3 minute survey!](#)

### New Status Available! Cancelled Same Day

Previously, a user could set the Visit Status of a broken appointment to only No Show (Red) or Cancelled (dark grey). Similarly, a user could set the Billing Status of a broken appointment to only No Show, No Show\* (no-penalty no show), or Cancelled. Now, due to popular demand, another option has been added to both areas: **Cancelled Same Day**. This will also appear dark grey.

### Customizable Required Fields Now Available!

Practices now can set additional minimum-necessary pieces of information for a new chart. In addition to the 7 existing minimum data needed, users have the ability to add **up to 9 new fields** as minimum practice requirements to create a new patient. The label of any "required" field that is missing data will turn red as a visual cue.

Practices may use this new feature to help meet immunization registry minimum data requirements for their state. For example, practices that are required to submit race and ethnicity to their state immunization registry might opt to make the race and ethnicity fields required. For more information on this feature, please see the [System Preferences: Demographics](#) article.

### New Bright Futures Handouts

32 new Bright Futures handouts were added to the database (12 English, 20 Spanish) on topics like acne, water safety, burn prevention, circumcision, and much more. To see all handouts, look in Clinical > [More] > Patient Education, then filter by BF (Bright Futures). You can now add these to your Orders/Patient education.

**Please note:** These handouts will not be automatically added to your well-visit templates, but you can [select which ones you want and add them as Resources](#).

### Task Enhancements

Two enhancements related to tasks have been introduced in this release. First, tasks are now assignable to a specific person on your team! Previously, you could only assign tasks to a particular department, and now you can also assign tasks to a specific individual! Similarly, you can now search and filter for tasks assigned to a particular user.

The next enhancement is in the task manager: new date filters are now available! Previously, users could apply two types of date range filters to tasks in the Task Manager: date Due or date Requested. Now, users have four choices: date **Due**, date **Completed**, date **Created**, or **All**.

- "Due" is unchanged.
- "Created" functions the same as "Requested" did (only the label is new).
- "Completed" permits a completion date search.
- "All" searches for tasks Due, tasks Created, OR tasks Completed within the given date range.

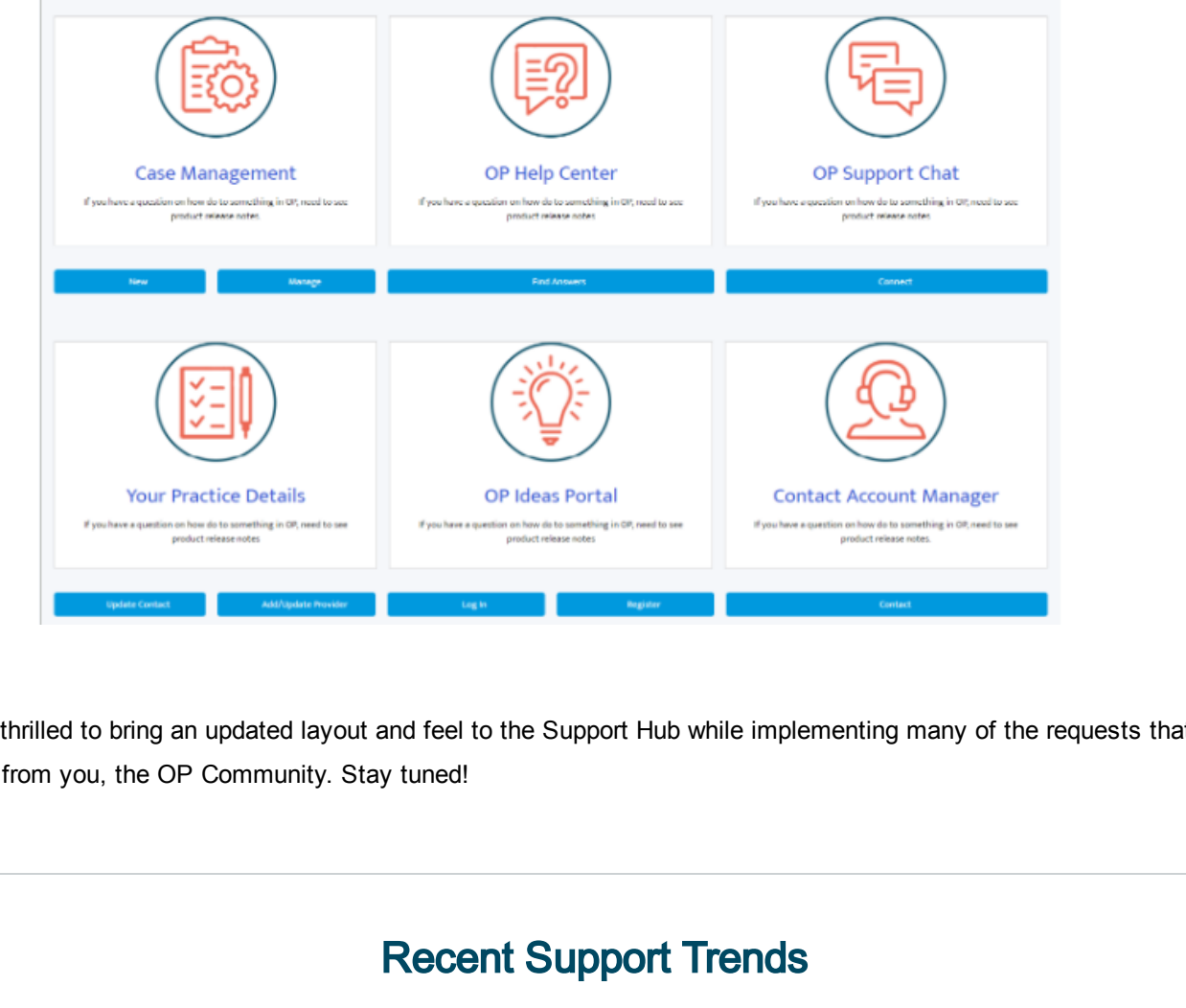
### More Room to Text in Patient Message eXchange (PMX)

Text (SMS) messages are limited to 160 characters. When sending Patient Message eXchange (PMX) messages, OP needs to reserve some of these 160 characters for statutory requirements, like the opt-out message. Previously, OP limited users to 116 characters. Now, users may use as many as **137 characters**.

**Note:** Messages are still limited to 160 characters in total. It is possible that a message to a patient with a very long name may have the end of the message cut off if the practice does not reserve enough space for name substitution.

### Add/Edit Appointment Patient Demographic Banner

Users asked for additional Patient Demographic information to show on the Add/Edit Appointment screen while scheduling an appointment. Our product team attempted to make the Add/Edit appointment screen bigger but ran into "screen real estate" issues. To solve this problem, in this release we've added this information to a collapsible/expandable Appointment Patient Banner.

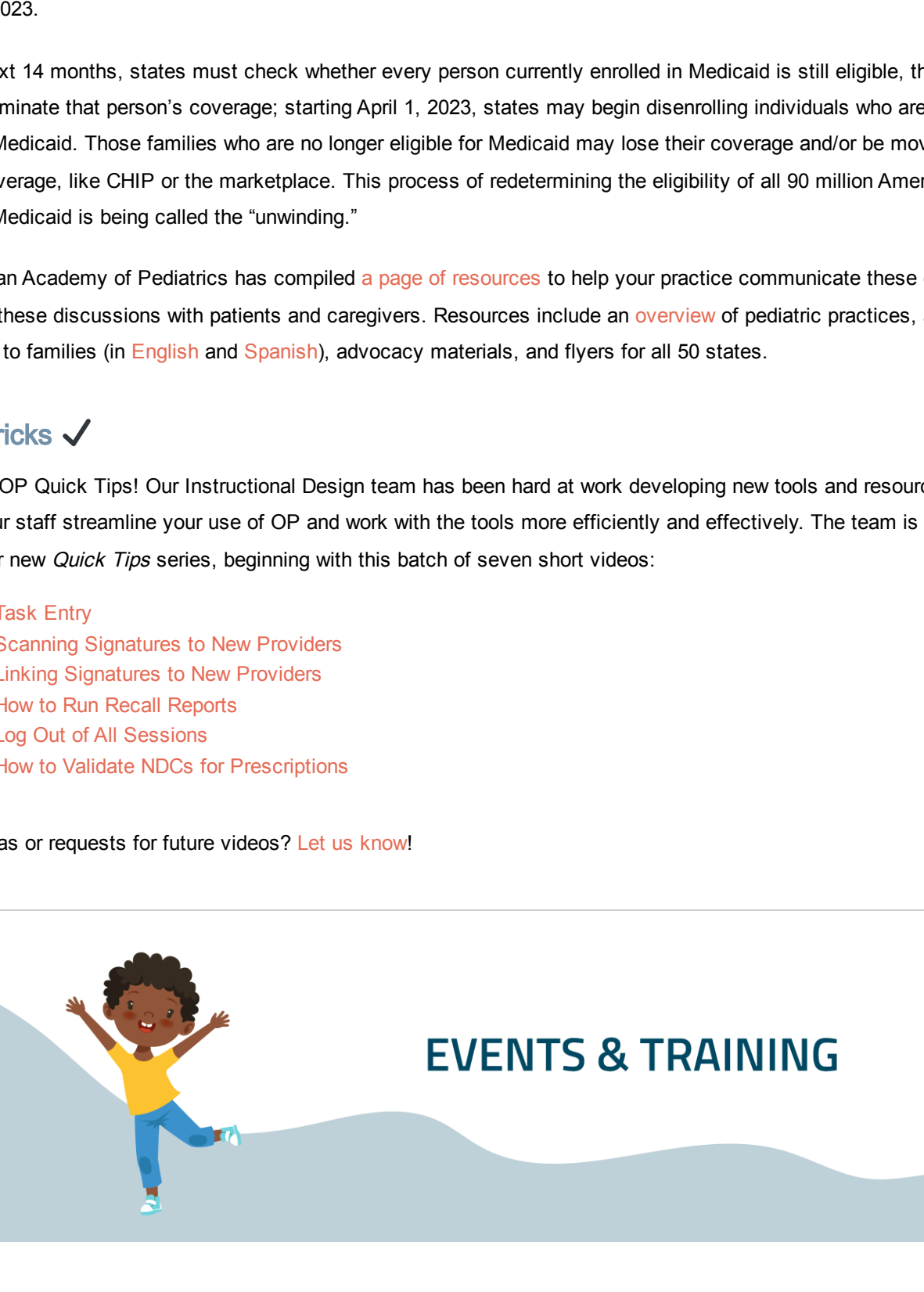


**Note:** This is a different feature than the general Patient Banner, but the interfaces behave similarly.

## SUPPORT CORNER

### The Support Hub is getting a facelift!

We are thrilled to announce we are wrapping up a full facelift for our Support Hub. This is a one-stop shop to allow users to log in and create & view cases, view & edit their contact information, and get in touch with your dedicated Account Manager.



We are thrilled to bring an updated layout and feel to the Support Hub while implementing many of the requests that came directly from you, the OP Community. Stay tuned!

## Recent Support Trends

**Top trends this month:** Password updates & enhancing security and Productivity Reports.

Our Customer Support team consistently manages and updates our [Support Trends](#) page on the [Help Center](#) to address issues identified as affecting multiple customers. This page also gives direction on what to do if you're experiencing one of these issues and provides workarounds, if available.



### Looking For Support?

Do you need help and are unsure of where to go? Check out the [OP Support Hub](#) to find links to email our team, manage your support cases, and more!

The OP Support Hub gives you access to all OP support channels, including the OP Help Center, case management, and online chat. The best channel for you will depend on what support needs you have.

## DID YOU KNOW?

### AAP Resources: Preserving Medicaid and CHIP Coverage

A policy that kept individuals continuously enrolled in Medicaid during the COVID-19 public health emergency (PHE) ended on March 31, 2023.

Over the next 14 months, states must check whether every person currently enrolled in Medicaid is still eligible, then either renew or terminate that person's coverage; starting April 1, 2023, states may begin disenrolling individuals who are no longer eligible for Medicaid. Those families who are no longer eligible for Medicaid may lose their coverage and/or be moved to other forms of coverage, like CHIP or the marketplace. This process of redetermining the eligibility of all 90 million Americans enrolled in Medicaid is being called the "unwinding."

The American Academy of Pediatrics has compiled a [page of resources](#) to help your practice communicate these changes and handle these discussions with patients and caregivers. Resources include an [overview](#) of pediatric practices, a letter you can provide to families (in [English](#) and [Spanish](#)), advocacy materials, and flyers for all 50 states.

### Tips & Tricks

Introducing OP Quick Tips! Our Instructional Design team has been hard at work developing new tools and resources to help you and your staff streamline your use of OP and work with the tools more efficiently and effectively. The team is thrilled to release their new *Quick Tips* series, beginning with this batch of seven short videos:

- Task Entry
- Scanning Signatures to New Providers
- Linking Signatures to New Providers
- How to Run Recall Reports
- Log Out of All Sessions
- How to Validate NDCs for Prescriptions

Got any ideas or requests for future videos? [Let us know!](#)

## EVENTS & TRAINING

### OP Educational Events

#### PediaTricks Podcast

Office Practicum's **PediaTricks Podcast** is a bi-weekly offering exclusively for OP users, giving them a unique perspective on relevant topics about OP. Industry experts, OP thought leaders, and OP community members join the guest list to discuss impactful topics.

In a [recent episode](#), host Shawn Rosler sat down with our Director of Product for Practice Management & RCM Technology, Matt Tadros, to discuss OP Financial Analytics: What does the solution encompass? Where can you find the financial information you need? And once you've found it, how can you take effective action? Shawn and Matt seek to answer these questions and more, so be sure to [check it out today!](#)



### Free Trainings

[Register today](#) for upcoming FREE training sessions in our Help Center!

|  |  |
|--|--|
| <b>Security Settings</b><br>Tuesday, April 4, 2023<br>1:00-2:00 pm EST   | <b>Medication &amp; Pharmacy Favorites</b><br>Thursday, April 6, 2023<br>11:00 am-12:00 pm EST   |
| <ul style="list-style-type: none"><li>• Create individual rights</li><li>• Give new Security Groups</li><li>• Review permission meanings</li></ul> | <ul style="list-style-type: none"><li>• Validate your Favorite NDC's</li><li>• Edit a favorite medication</li><li>• Create a favorite medication</li><li>• Updating Favorite Pharmacy List</li></ul> |
| <a href="#">Register</a>   | <a href="#">Register</a>   |

|   |   |
|---|---|
| <b>Vaccine Setup 101</b><br>Thursday, April 6, 2023<br>1:00-2:00 pm EST   | <b>Referrals Workflow</b><br>Thursday, April 18, 2023<br>11:00 am-12:00 pm EST  |
| <ul style="list-style-type: none"><li>• Learn how to prep vaccine setup for Go-Live</li><li>• How to keep vaccine inventory up to date and pull reports</li><li>• Update Vaccine Handouts and VIS publication dates</li></ul> | <ul style="list-style-type: none"><li>• Creating referral tasks</li><li>• Create the referral and the capability of sending it if the office has the capability of sending it electronically</li><li>• Re-issuing a Referral</li><li>• Respond to a Referral - Best Practices for closing the referral (completing the process, Med Rec.)</li></ul> |
| <a href="#">Register</a>  | <a href="#">Register</a>  |

|  |  |
|--|--|
| <b>Reducing Insurance A/R w/ EOB Payment Posting</b><br>Tuesday, April 18, 2023<br>3:00-4:00 pm EST  | <b>Clinical Reports (DAR)</b><br>Thursday, April 20, 2023<br>11:00 am-12:00 pm EST   |
| <ul style="list-style-type: none"><li>• Learn how to post a paper EOB</li><li>• Interest Payments</li><li>• Payer Refunds</li><li>• Payer Recoups</li><li>• Payer Overpayments</li></ul> | <ul style="list-style-type: none"><li>• Pull various vaccine reports</li><li>• How to pull reports to see what patients are due for Well Visits</li><li>• Reports for clinical recalls</li><li>• How to send recall reminders</li><li>• Creating/Printing Letters from the Demographic Analysis Recall Report</li><li>• How to send messages</li></ul> |
| <a href="#">Register</a>   | <a href="#">Register</a>   |

## STAY IN TOUCH

### We would love to hear from you!

**Please send us your ideas!** We want your thoughts and feedback about how we can make your lives easier through technology.

- Topics for training webinars
- Features you would like to see in future releases
- Successes you want to share with the pediatric community

[I have an idea!](#)

### Do we have the right point of contact for your practice?

Over the past few years, we've seen unprecedented change as the world reckoned with the impacts of Covid-19. One of the biggest shifts specific to the healthcare industry has been the staffing challenges that we know many of you are still navigating. To ensure the right people on your team receive our communications, please take a moment to [update your practice's contact information](#) using our easy-to-fill form.

Multiple staff changes? No problem! You will have the option to add or edit more than one contact at a time without needing to submit the form multiple times.

[Submit new info](#)

