OP PORTAL MEDICAL RECORDS

DATES:

ACTIVITIES

A patient's medical records, including **Labs**, **Visit Note Summaries**, **Surveys**, **Medications/Prescriptions**, and more, with a **Visibility Level** of **Any Staff Member** can be sent to the OP Portal for the parent/patient to view.

The sections below outline the individual qualifications for each Medical Record type to be sent to the OP Portal.

NOTES/LINKS

Labs

Labs will be visible to the parent/patient in the OP Portal if they have a **Reviewed**, **Informed** or **Complete** status, and will show up in the Labs Results section of Medical Records on the parent's view. Any additional/supplemental documents included with the lab will show up in the Results Documents section of Medical Records on the parent's view.

To have a patient's labs be sent over to the OP Portal, please note:

- Lab Orders and Results that have a visibility level higher than Any staff member will not be sent to the OP Portal.
- Lab Orders created in OP must be associated with a provider.
- Tests and result components, created in Diagnostic Tests, must contain a LOINC code.

Documents

Anything that you choose to **Share to Portal** in Document Management, with a Visibility of **Any Staff Member** will be visible to the parent on the OP Portal. Documents that can come over from OP include Visit Note summaries, Printed Prescriptions, Results Documents, and more.

OP PORTAL MEDICAL RECORDS

DATES:

ACTIVITIES

NOTES/LINKS

Prescriptions

In your configuration, you would have chosen to send **ALL** of a patient's medications/prescriptions to the OP Portal, or only **CURRENT** Medications. If you chose current, it refers to Medications in OP that are either marked as chronic or do not include an Rx end date. Past Medications, on the other hand, are those that have an end date that has passed.

To change a Medication so that it is displayed in the Past Medications tab rather than the Current Medications tab follow one of the workflows below:

1. In OP, navigate to the patient's Medications in their chart.
2. Select the Medication to edit, and click the Edit button.
3. If selected, deselect the Include in chronic medication list checkbox. An end date will populate following current calculation based on Start Date, Days Supply, and # of Refills.
4. Click the Save button to save your changes.

OR

1. In OP, navigate to the patient's Medications in their chart.
2. Select "N" from the Chronic drop-down menu to change a medication from chronic to not chronic. An end date will populate following current calculation based on Start Date, Days Supply, and # of Refills. If the calculated end date is earlier than today, the end date will default to today's date.

FURTHER INFORMATION

To ensure Medications are displayed in the portal where the patient or parent would expect to see them, we recommend confirming the Rx End Date at the time a prescription is created.

PROVIDER MEDICAL RECORDS

DATES:

SURVEYS

NOTES/LINKS

How Surveys Get Sent to the OP Portal

Respective of patient privacy, only Surveys with a visibility level of Any Staff Member are sent to the portal. Surveys are sent to the portal when:

- A **Task** is created for the Survey to the Patient Department.
- An appointment, scheduled using a Template that contains a Standing Order, is marked **Confirmed**, **Self-confirmed** or **Left message**.

Important: If you are experiencing Surveys being automatically sent to the portal 7 days prior to the appointment, you may contact support to change the submission of surveys to the portal. This change will use the Confirm Statuses of Confirmed, Self-confirmed, and Left message as to when a survey is sent to the portal.

Rescore Surveys Taken on the Portal

Internal OP Surveys completed on the portal are received in OP with a score of -1. This indicates to the provider that the Survey needs to be rescored. To rescore the Survey:

1. Navigate to and select the **Survey** in the **Patient Chart**.
2. Click the **Rescore** button. The Survey is scored according to the rules in OP and the new score is displayed.

Survey Setup Automation: Add Surveys as Tasks to a Template

1. Navigate to **Encounter Templates** or **Well Visit Templates** and select a **template**.
2. Click the **Orders/Workflow** tab.
3. Click the **Surveys** tab and modify the following for existing surveys.
    - Click the drop-down for **Department** and select **Patient**.
    - Click the drop-down for **Usage** and select **Standing**.
4. Click the **Save** button.
5. Repeat the above steps for all surveys that will be sent to the OP Patient Portal.

Note: If adding a new survey to a template, confirm **Patient** is selected as the Department and the Usage is set to **Standing**. For additional information on adding a survey to a template, click **here**.

FURTHER INFORMATION

Surveys are received in the portal as Messages which direct the parent/patient on how to complete the Survey. As a reminder, both the OP user sending the Survey and the patient receiving the Survey require an active portal account for the Survey to be successfully sent to the portal.

PROVIDER MEDICAL RECORDS

DATES:

SURVEYS

NOTES/LINKS

Workflow: Task a Survey from a Visit

1. From an open Well or Encounter visit note, select **Plan/Orders**.
2. Confirm the Survey is submitted as a task on the Order Worksheet Summary.
3. To add an additional survey, follow the steps below.
    a. Click the **Survey** tab.
    b. If the survey to task is available in the survey picklist window, confirm the **Department** is **Patient** and click the checkbox in the **Add** column.
    c. If the survey to task is not available,
        i. Click the **Add** button.
        ii. Click the drop-down and select the **survey** from the list.
        iii. Confirm the **Department** is **Patient**, click the **Save** button.
    d. Once all surveys are added, click the **Create** button.
    e. Click the **OK** button, on the confirmation window, to create the survey task.

Workflow: Create a Survey Task Outside of a Visit

1. From a patient chart, click **Tasks**.
2. Click the **New Order** button to open the Order Worksheet.
3. Click the **Survey** tab then click the **Add** button.
4. Click the drop-down and select a **survey** from the list.
5. Confirm the **Department** is **Patient**, click the **Save** button.
6. Once all surveys are added, click the **Create** button.
7. Click the **OK** button, on the confirmation window, to create the survey task.

.

Parent/Patient Didn't Complete the Survey on the Portal

If a Survey was sent to the portal but was not completed on the portal, the practice may decide to complete the Survey in the office during the patient's visit. When this is the case, the following steps should be taken to disable the Survey that was previously sent to the portal and task the Survey to be completed in-office.

1. From the patient chart, click **Tasks**.
2. Select the **Task** for the Queued Survey, and click the **Delete** button. Once the Survey Task is deleted, the parent will not be able to take the Survey from the Message they received in the Patient Portal. They can be instructed by the practice staff to ignore the message or mark it Read.
3. Create a **new Task** for the Survey, making sure to send it to a department other than Patient, or, click **New** in the Survey window and complete the survey..