

There are different core messages types available in the OP Portal. Message types and tags allow requests like Appointment Requests, Rx Refill Requests and Document Requests to be sent to the appropriate staff member in OP.

## MESSAGE TYPES

## NOTES/LINKS



### Core Message Types

- Appointment Request (facilitated through the Appointments Module)
- Billing Questions
- General Messages
- Medication Refill (facilitated through Refill Requests)
- Referral Request
- Document Requests (facilitated through the Forms Module)

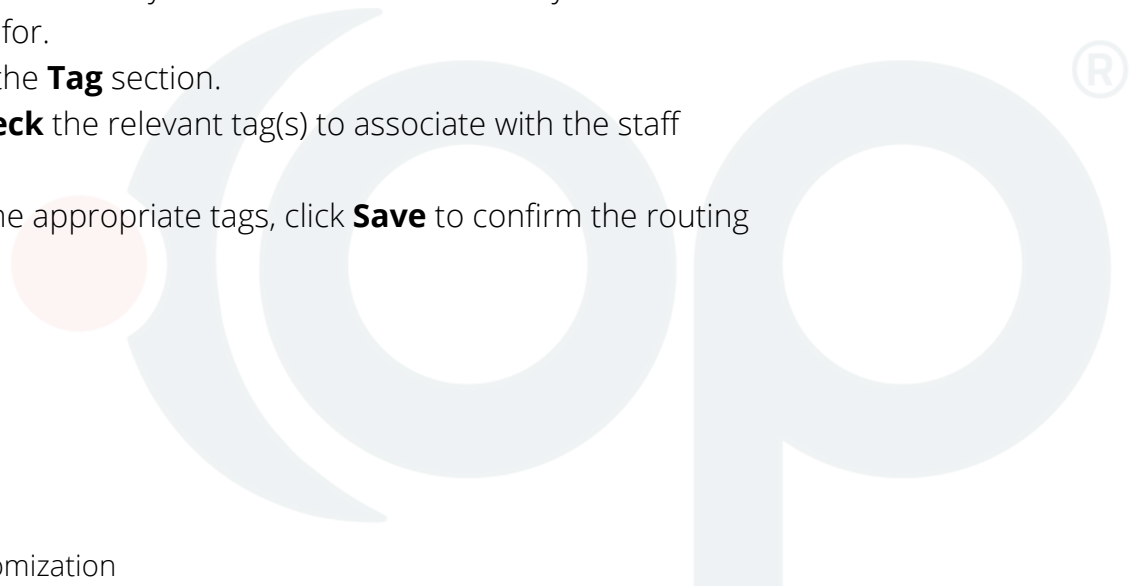
## MESSAGE TAGS

Tags function as question types that parents can select when sending messages, or in a specific place on the OP Portal as outline above. These messages with the associated tags are sent to a group of assigned staff. When you first get the OP Portal, all of your staff will be configured to receive the requested Message types using Tags. If you need to update your Staff to receive or not receive certain message types in the future, you can assign or remove them to tags from their Staff Permissions.



### Add/Remove a Tag for a Staff Member

1. From the navigation menu on the left, select **Settings > Staff Permissions** to manage staff settings.
2. Use the search functionality to find the **staff member** you wish to route messages for.
3. Click to expand the **Tag** section.
4. **Check** or **uncheck** the relevant tag(s) to associate with the staff member.
5. After selecting the appropriate tags, click **Save** to confirm the routing configuration.



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**NOTES/LINKS**

## MESSAGE LOCATIONS

In your initial configuration, you would have provided OP a list of your staff and their associated locations for the question types. Location-based routing ensures that messages are directed to staff members at the appropriate clinic or office. This feature is particularly useful for practices with multiple locations, allowing for advanced filtering where users can share a tag but receive messages based on their specific location.

Locations will be created automatically, but if a staff member moves to a different location you can assign them to another location:



### Add/Remove a Location for a Staff Member

1. From the navigation menu on the left, select **Settings > Staff Permissions** to manage staff settings.
2. Use the search functionality to find the **staff member** you wish to route messages for.
3. Click to expand the **Location** section.
4. **Check** or **uncheck** the location(s) to associate with the staff member.
5. After selecting the appropriate tags, click **Save** to confirm the routing configuration.

