Are you Portal Ready?

OP Portal Readiness

Family Contacts
3 Weeks before Go-Live

1

In OP, run the All Contacts of Active Patients SQL to view current contacts and fields needed for OP Portal registration. Merge Contacts if needed.

Privacy and Visibility
2 Weeks before Go-Live

2

Anything that is set at a visibility level of 'Any Staff Member' in OP will come over to the OP Portal. Review and/or update Visibility Settings.

Message Groups
2 Weeks before Go-Live

3

Determine which staff members will get which message types (Appointment Requests, Rx Refill Requests, etc). In OP, ensure all staff have appropriate permissions.

Appointment Type Cleanup
2 Weeks before Go-Live

4

In OP, review your Appointment Types and use these SQLs to cleanup/archive any 'orphaned' types.

Training
1 Week before Go-Live

5

Attend a Customization Webinar, hosted by our Training Team.

Customize Widgets
Pre Go-Live

6

Once you have access to your OP Portal, review and customize widgets on your patient's home page.

Appointment Requests
Pre Go-Live

7

In the OP Portal, review Appointment types that can be requested and hide any appointment types that you don't want parents to be able to request.

Message Routing
Pre Go-Live

8

Review the Message Routing rules that you put on your Configuration document in the OP Portal.

Launch OP Portal
Go-Live!

9

Monitor your first day go-live. Registration emails will be sent to parents with the related contact information.

Training
Post Go-Live

10

Attend a Q&A webinar hosted by our Training Team.

https://op.knowledgeowl.com/help/op-portal