

Widgets are the sections that appear on the patient's OP Portal home page and the Medical Records page. They can be clicked on to navigate to different pages, and/or expanded to see more information, based on the type. Widget placement can be customized on the Home page and Medical Records page to enhance the patient/parent experience, and custom widgets can be created for the Home page.

## HOME PAGE WIDGETS

The main widget boxes on the home page show snapshots of the details of that page (for example, the Appointments widget shows upcoming appointments). You can create custom widgets for the Home Page, such as a link to your practice website.



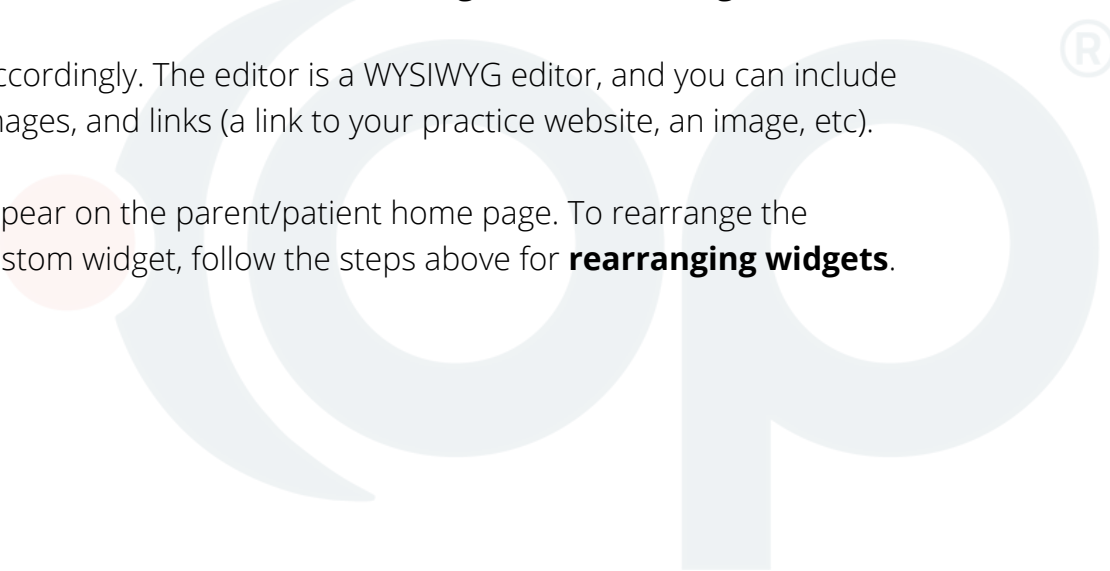
### Rearrange, Disable or Enable Widgets

1. From the navigation menu, click **Settings > Widgets**.
2. To rearrange widgets, click the widget and hold to **drag and drop** to the placement you want.
3. To hide/disable widgets,
  - a. Click the **ellipsis** button next to the widget.
  - b. Click to toggle **off** the Enabled button.
4. To enable hidden widgets,
  - o Click the **disabled** button, *OR*,
  - o Click the **ellipsis** and toggle **on** the Enabled button.
5. Click **Save** after updating each of the sections (the Save button for each section is below each list of widgets for that section).



### Add a New Custom Widget

1. From the navigation menu on the left, click **Settings > Custom Widgets**.
2. Click **Add New**.
3. **Edit** the widget accordingly. The editor is a WYSIWYG editor, and you can include formatted text, images, and links (a link to your practice website, an image, etc).
4. Click **Save**.
5. The widget will appear on the parent/patient home page. To rearrange the position of the Custom widget, follow the steps above for **rearranging widgets**.



## HOME PAGE MINI WIDGETS

Mini widgets act as links to main pages in the OP Portal (eg you can create a Mini Billing widget for the top of the home page that will allow the patient/parent to easily click and navigate to the Billing page).



### Add a New Custom Mini Widget

1. Get the URL path (Route) to the page you want to create a Mini Widget for:
  - a. On the Patient Portal side, navigate to the page.
  - b. Copy the path in the URL beginning with **/panel/...** until the **"?user\_id"** text, eg **/panel/results/labs-orders**.
2. On the Admin side, navigate to the Custom Mini Widget page: **Settings > Custom Mini Widgets**.
3. Click **Add New**.
4. Enter the Mini Widget information:
  - o Right-click and paste the path URL into the **Route** field.
  - o Add the **Icon**.
  - o Enter the **Title** (English and Spanish).
  - o Enter the **Subtitle** (English and Spanish).
5. Click **Save**.
6. Navigate to Widgets and follow the steps to enable and rearrange the Mini Widget on the homepage.

## MEDICAL RECORDS WIDGETS

The Medical Records page has widgets and Mini Widgets. You can enable, disable and rearrange the Medical Records widgets but cannot create custom ones.



### Rearrange, Disable or Enable Medical Records Widgets

1. From the navigation menu, click **Settings > Widgets**.
2. Scroll down to the **MR Widgets** and **MR Mini Widgets** columns.
  - o To rearrange widgets, click the widget and hold to drag and drop to the placement you want.
  - o To hide/disable widgets, click the widget and hold to drag the widget from the Active Widgets column to the Inactive Widgets column.
  - o To enable hidden widgets, click the widget and hold to drag the widget from the Inactive Widgets column to the **Active Widgets** column.
3. Click **Save** after updating each of the sections

