

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. **Please note:** Custom Widgets cannot be deleted, they can only be disabled on the Widgets page, or edited from Custom Widgets.



### 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**.



### Edit a Custom Widget

1. From **Settings > Custom Widgets**, select the widget.
2. **Edit** the widget accordingly.
3. Click **Save**.

## 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 by navigating to the page on the patient side and copying the page URL. The main page Routes are below:
  - **Appointments:** /panel/appointments
  - **Billing:** /panel/billing-balance/balance
  - **Messages:** panel/messages
  - **Medical Records:** /panel/medical-records
  - **Documents:** /panel/medical-records/documents
  - **Refill Request:** /panel/prescriptions
  - **Results > Lab Results:** /panel/results/labs-orders
  - **Results > Documents:** /panel/results/documents
  - **Patient Education:** /panel/patient-education
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:
  - **Route:** Paste the page URL from above here.
  - **Icon:** Use a [Material Icon name](#) by navigating to the linked site, selecting the icon you want to use, and clicking Copy Ligature, then pasting in the Icon field.
  - **Title** (English and Spanish): Add the title of the Mini Widget, the page name.
  - **Subtitle** (English and Spanish): Enter the description, which will appear below the title on the Mini Widget.
5. Click **Save.**
6. Navigate to Widgets and follow the steps to enable and rearrange the Mini Widget on the homepage.



### Edit or Remove a Custom Mini Widget

1. From **Settings > Custom Mini Widgets**, select the widget.
2. **Edit** the widget and **Save**, or click the **Remove** button.

## 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.
  - To rearrange widgets, click the widget and hold to drag and drop to the placement you want.
  - To hide/disable widgets, click the widget and hold to drag the widget from the Active Widgets column to the Inactive Widgets column.
  - 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

