

OP Practice Portal: Patient Update Workflow

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Version 20.16

About

The ability to request an edit of patient data is a feature that can be turned on in the **OP Practice Portal**. Below you will find instructions on how this feature is turned on and the workflow to update the patient record in OP.

Enable Patient Updates

1. Log in to the Practice Portal.
2. Navigate to **User Administration > Staff Members**. Select the user in the staff member list.
3. Locate the **Permissions** section and select the two permissions necessary to use this feature.
 - Expand **Patient Administration** and click the **Patient Updates** checkbox.
 - Expand **Patient Interface** and click the **Editable Patient Data** checkbox.
4. Log off the Practice Portal then log back in to view the Editable Patient Data section.
5. Navigate to **Portal Management > Patient Interface**.
6. Locate the **Editable Patient Data** section and toggle on which features to allow updates from the Patient Portal.

Editable Patient Data	FEATURE	ACTIVE
Select all functions that patients should have access to update within the portal.	Demographics	<input checked="" type="checkbox"/>
	Emergency Contact	<input type="checkbox"/>
	Family History	<input type="checkbox"/>
	Medical History	<input type="checkbox"/>
	Social History	<input checked="" type="checkbox"/>
	Visits	<input type="checkbox"/>
	Vitals	<input type="checkbox"/>

7. Click the **Save** button.

Update Patient Demographics and/or History

Information may be updated on the Patient Portal for demographics or history. Request are made by the parent/guardian/patient to change information and it is the responsibility of the practice to modify OP and accept or deny the request on the Practice Portal.

1. Log in to OP and select the **Unread Portal** tab in the Message Center.
2. In the Scope section, select **\$AD** from the staff drop-down list.
3. Select a message with the Subject of:
 - Patient Medical History Update
 - Patient Social History Update
 - Patient Family History Update
 - Patient Demographics Update

Read	Patient Name	Subject	Date/Time of Message	Spoke With	Sender	Recipient(s)
<input type="checkbox"/>	DEY, MARTIN	Patient Medical History Update	08/14/19 01:23 pm		Web Portal User	Admin User
<input type="checkbox"/>	DEY, MARTIN	Patient Social History Update	08/14/19 12:46 pm		Web Portal User	Admin User
<input type="checkbox"/>	DEY, MARTIN	Patient Social History Update	08/14/19 12:38 pm		Web Portal User	Admin User
<input type="checkbox"/>	BOSCH, HARRY	Patient Family History Update	08/14/19 12:31 pm		Web Portal User	Admin User
<input type="checkbox"/>	BOSCH, HARRY	Patient Family History Update	08/14/19 12:23 pm		Web Portal User	Admin User
<input type="checkbox"/>	NEWMAN, ALICIA	Appointment Request	08/12/19 07:56 pm		Web Portal User	Admin User
<input type="checkbox"/>	NEWMAN, ALICIA	Patient Demographic Update	08/12/19 06:34 pm		Web Portal User	Admin User

4. Navigate to the areas of the patient chart and make the requested changes.

 **Note:** All changes must be made in OP to update the patient record on the Practice Portal.

Accept/Deny Updates on the Practice Portal

1. Log in to the Practice Portal and select **Updates** in Filter by: in Manage My Patients section of the Dashboard.

MANAGE MY PATIENTS Save Preferences

Select Date Range: 01/01/2020 to 01/14/2020 | Location: Select a Location | Provider(s): Select Provider(s)

Filter by: Appointments **Updates** Form Submissions

PATIENT	LOCATION	APPOINTMENT TIME	REASON	DEMOGRAPHIC UPDATES	CLINICAL UPDATES	SUBMITTED FORM
TESTWEBINAR, CINDY				No	Yes	No

- (Optional) Modify the date range to locate the patient(s) requesting demographic or clinical updates.
- Click a patient in the list to display the Patient Account page.
- Click the **Patient Updates** tab to view the requests.

Chart Summary | Engagement Summary | **Patient Updates**

Patient Updates

Social History Updates

GENERAL						
BIRTHPLACE	CHILDREN	OCCUPATION	MARITAL STATUS	EDUCATION LEVEL	RETIRED	CARBON MONOXIDE DETECTOR
No change (No value)	No change (Not Available)	No change (No value)				

CAFFEINE		
USES CAFFEINE	TYPE	AMOUNT PER DAY
No change (No value)	No change (No value)	No change (No value)

EXERCISE				
HEALTH/FITNESS CLUB MEMBER	FREQUENCY	HOURS/WEEK	ACTIVITY LEVEL	ACTIVITY DESCRIPTIONS

5. Select the appropriate button to Accept or Reject updates.

TOBACCO						
SMOKER STATUS	AMOUNT PER DAY	TYPE	YEARS USING	QUIT ATTEMPTS	QUIT DATE	SECOND HAND EXPOSURE
No change (No value)	Yes (New)					

Family History Updates			
NAME	RELATIONSHIP	BIOLOGICAL RELATIONSHIP	CONDITION (STATUS)
<input type="checkbox"/> Bruce Testwebinar (New)	Father (New)	Yes (New)	Asthma (New)

- Reject Updates/Reject Selected Updates:** Message displays, click the **OK** to reject the changes or **Cancel**.

Are you sure you want to reject these updates? ✕

- Accept Updates/Reject Selected Updates:** Message displays, click **OK** to accept the changes or **Cancel**.

Are you sure you want to apply these updates to your system?

x

Cancel

OK



Note: You must accept or reject the updates to update the record appropriately on the Patient Portal.