Practice Setup and Management FAQs

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What is the best way to enter specialty groups with multiple providers in Address Book?

You can put the large groups in as their own entries, so that you can refer to the entire group. You can put the list of doctors in the notes section of the Address Book entry if you want the information.

Ideally, you would have entries for both the group and individual doctors. Initially, when you refer a patient, you may not know which doctor they will see in the specialty practice, but when you get the referral letter back from the specialist you want to be able to add that specific doctor to the patient's record.

What permission do I need to merge patient charts?

The permission to merge charts is: AA_System Admin. This is typically a permission included for System Admins. This permission also allows the user to assign permissions and passwords to users.

How do I change colors of appointments?

How do I add a new user and give permissions?

To add a new staff member or provider into the OP software, follow the chart below to locate to the articles for the steps necessary to add the staff member/provider and grant permissions:

Topic of Instruction	Adding a Staff Member	Adding a Provider
Adding Basic Staff Information into the Staff/Provider Directory	Adding Staff into the Staff Directory	Adding Staff into the Staff Directory
Adding Provider Specific Information into the Staff/Provider Directory	N/A	Setting Up Providers in the Staff Directory Note: Users must complete the Basic Staff Information entry above prior to using this instruction.
Adding Staff and Providers to Permission Groups	Managing Group Permissions	Managing Group Permissions
Adding a Scanned Signature to a Provider's Record	N/A	Linking a Signature to a Provider
Adding Credentialed Providers to Insurances	N/A	Connect Providers to Insurance Payers

How do I update a Provider's legally changed name?

Overview

Prior to changing a provider's name in OP 14, you will want to be sure to contact any party that receives information from the provider either by name, or some numerical identifier. The order in which changes should be made would be best determined by the parties receiving the information. The best place to start with a legal name change for a provider is with the NPI Registry, but all entities should be contacted. This article will instruct you how to update the provider's name in OP 14 when it is determined the best time to do so.

> **Warning**: Failure to contact all vendors or parties receiving information may result in rejections such as claim rejections or prescription rejections.

Staff/Provider Directory

1. Navigate to **Utilities** > **Manage Practice** > **Staff/Provider Directory**. The Staff Directory window will open.
2. Select the provider's name in the Staff name column. These are listed by location. If you do not see the provider you're looking for, either change the location or select the All checkbox. After selecting the provider, his/her information will appear in the right side of the window.
3. If you are not already there, click the **Basic Info tab**.
4. Click the **Edit Record** button ✏️ .
5. Edit the following as appropriate:

   - First/middle name
   - Last name/suffix
   - Initials
   - Colloquial name

6. Click the **Provider Info** tab, and edit the Signature name.
7. Click the **Post Edit** button ✅ to save your changes.

Address Book

The provider's name in the Address Book will be updated automatically once the Staff/Provider Directory entry is saved. However, it is still necessary to confirm the complete entry for the provider in the Address Book.

1. Click **Adr Bk** on the Smart Toolbar. The Address Book window will open.
2. Search for the provider by name or category.
3. Select the provider entry.
4. Click the **Edit Record** button.
5. Review and edit the tabs as appropriate.
6. Click the **Post Edit** button.
7. Click **Exit**.

> **Note**: It may be appropriate to change the signature of the provider that has been scanned into OP. After removing the existing signature, click **here** to learn about scanning in a provider's signature.

How do I add a new location for my practice?

Before you add a new location in the OP software, please contact your Client Account Manager. Once you have consulted with your Client Account Manager, follow the links below to add a new location.
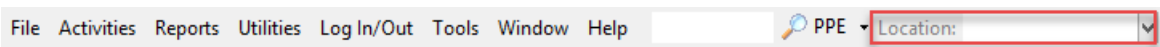
> **Note**: Larger practices with multiple sites may need to add a new **location**. Do not add a new **practice** to your OP (implying multiple tax IDs and practice NPIs, multiple OP instances, multiple portal setups, and more) unless you have been instructed by OP staff to do so. Improperly adding a **practice** when you should have added a **location** may cause your portal to malfunction.

Some of the items to complete when adding a new location (or relocating an existing location) include (but are **not** limited to):

- Add the new location information to the **Practices and Locations** window.
- Enable the multi-location feature.
- **Assign staff members** to the new location (see step 11): Users will only be able to log into locations in which they have been assigned in the Staff/Provider Directory.
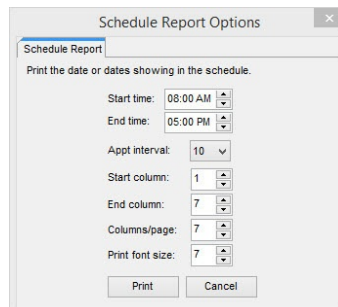
> **Example**: If you have been assigned to multiple locations, a Location drop-down menu will be displayed when you log in. If you travel between locations in the same day, the Location drop-down menu at the top of OP must be changed to the correct working location. This menu also impacts the Vaccine Inventory as immunizations are administered.
>
> File Activities Reports Utilities Log In/Out Tools Window Help   🔍 PPE ▾ Location: _____ ▾

- Configure your Practice's schedule to include the providers who will see patients in the new location:

  - **Add providers** to the new location's schedule.
  - Move a provider's **schedule template** to the new location.
  - **Copy slots** from a current location and paste them in the schedule for the new location.

How do I print a Schedule Template?

1. Navigate to the Schedule Template Editor (**Utilities > Manage Practice > Schedule Templates**).
2. Select the Staff member whose Schedule Template you would like to print.
3. Select the Template you would like to print.
4. Click the **Print** button 🖨 . The Schedule Report Options window will open.

5. Complete the following:

   - **Start and End times**: the time range that you want to include on the Schedule Template printout.
   - **Appt interval**: the intervals in which you want to print. If your template is set to 10 minute intervals, set this field to also be 10 minute intervals.
   - **Start and End columns**: the columns are numbered by the day of the week. For example, if you choose 1 in the Start column field, Sunday will be the first column on the schedule template printout. The End column is the last column that will be included on the Schedule Template printout.

- **Columns/page**: this is the number of columns (days) that appear on a page when the Schedule Template is printed out.

> 📌 **Note**: To print a full week on one page, enter the following:
> - **Start column**: 1 (to start on Sunday)
> - **End column**: 7 (to end on Saturday)
> - **Columns/page**: 7

6. Click **Print**.

How can I change the order of staff in lists?

To change the order in which staff appear in lists, the List # in the Staff/Provider Directory record may be modified. Referred to as List #, Sort #, or Sort Order throughout the system, these numbers should be unique to ensure that the expected order of items is generated. To modify a staff member's List #:
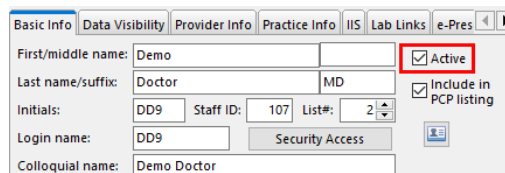
1. Navigate to the Staff/Provider Directory (**Utilities > Manage Practice > Staff/Provider Directory**). The Staff Directory window will open to the Basic Info tab.
2. Select a user from the left pane in the window.
3. Click the **Edit Record** button ✏️.
4. Modify the List #, as necessary.

> 📌 **Note**: The List # for one user should not be be the same as another user. Verify that there are no duplicate List #s by checking the list numbers of all other staff members.

## How do I delete Staff from the Staff/Provider Directory?

Once a user is created in the Staff/Provider Directory, they can not be deleted, but they can be deactivated. Deactivating a user will remove them from drop-down lists where they may have previously been listed, such as in the **To** field of a message window. In addition, following the below steps will prohibit the staff member access to OP.

1. Navigate to the Staff/Provider Directory by **Practice Management > Staff/Providers**. The Staff Directory window will open to the Basic Info tab.
2. Select a user from the left panel and click the **Edit** button.
3. Deselect the **Active** checkbox.

4. Click the **Save** button.
5. Click the Security Access button and select the user in the **Users** panel.
6. Click the **Edit User** button.
7. Deselect the **Enabled** checkbox and click **OK**.
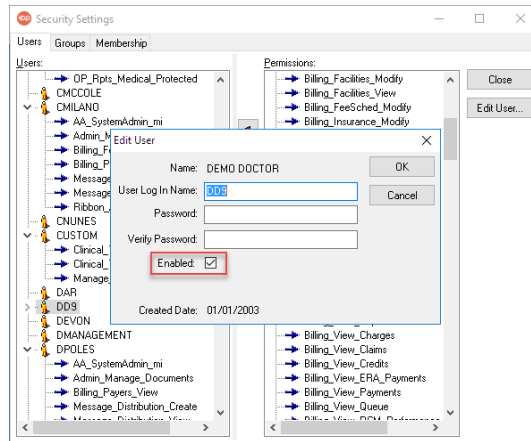
> 💡 **Tip:** OP recommends placing the words **Do Not Use** in the First Name field of the user record.

Why can't I see all of the Providers in the Clinical Work scope drop-down?

In order to see all Providers/Staff listed in the Clinical Work scope drop-down, each Provider/Staff member must be assigned to the location in which the user is logged into. If a user is not listed in the **Scope** drop-down:

1. Notice the **Location** selected in the upper right-hand corner of the ribbon.
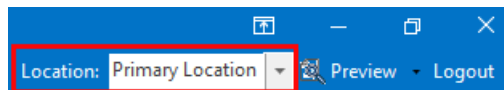
2. Navigate to the missing Provider/Staff member's record in the Staff Directory: **Practice Management** tab > **Staff/Providers**.
3. Verify the location(s) to which the user has been assigned. In the image below, the Provider is not assigned to the **Primary Location**, which is the location in which the user is logged into. This is what is preventing the Provider from showing in the **Scope** drop-down in the **Clinical Work** window.
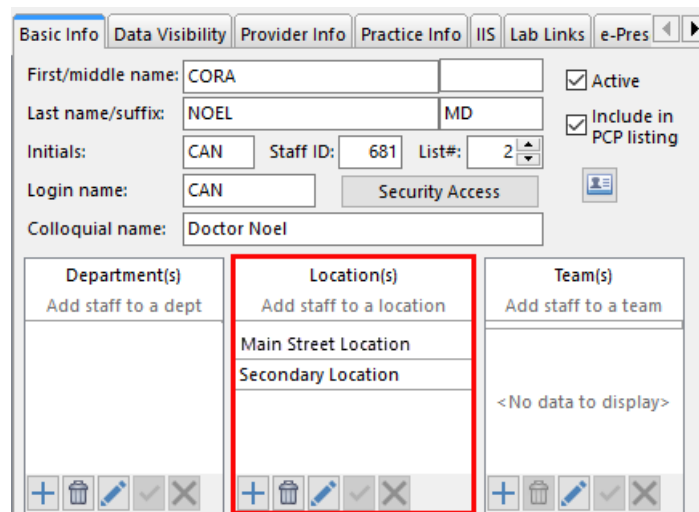

4. Edit the users profile, and add the location to the Provider/Staff record.
5. Save the changes.
6. Log out of OP and log off all sessions.
7. Relaunch OP. The Provider/Staff member will now be displayed in the Clinical Work scope.

How do I copy a Provider schedule to a new location?

If the provider has Schedule Templates created you are unable to copy between locations. An alternative is to use the Slots feature on the Calendar, follow the instruction below.

1. Navigate to the Schedule confirming you have the Calendar radio button selected.
2. Click the **Office View** tab.
3. Click the **Slots** button.
4. Click the drop-down and select the provider who's schedule to copy.
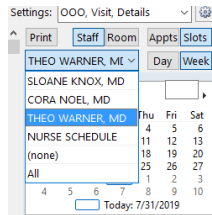
5. Select the **Week** button.
6. Right-click on the first slot and select**Copy week**.
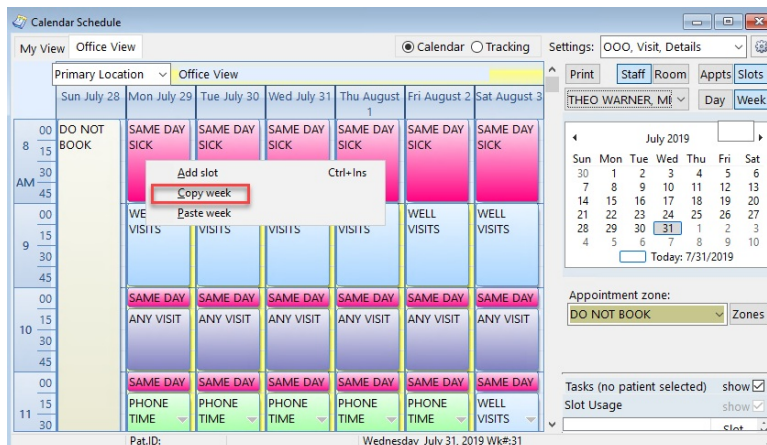
7. Click the location drop-down and select the location to copy the week to.
8. Right click in a slot and select**Paste week**.
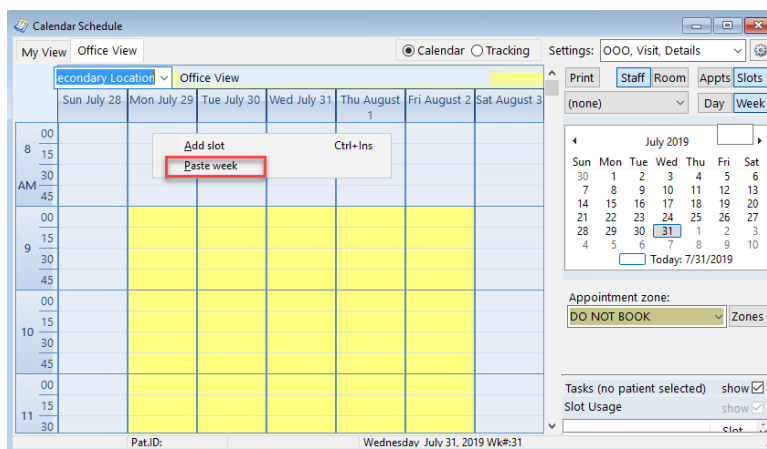
9. Repeat the steps.

How do I remove a user from the To drop-down in a Message?

Inactive users are not displayed in drop-downs lists in OP. If you recently made a user Inactive in the Staff Directory, you must log out and back in after saving the change to see that the user's name was removed from the list.