

How to Use the OP Ideas Portal

Last Modified on 04/23/2021 2:26 pm EDT

Version 20.12

Overview

The OP Ideas Portal is a place for you to share your ideas, have your voice heard, and contribute to Office Practicum's fast-paced innovation process. Any registered user may submit an idea for improving OP software. You will also have the opportunity to vote or comment on ideas others have posted as a means to show your support.

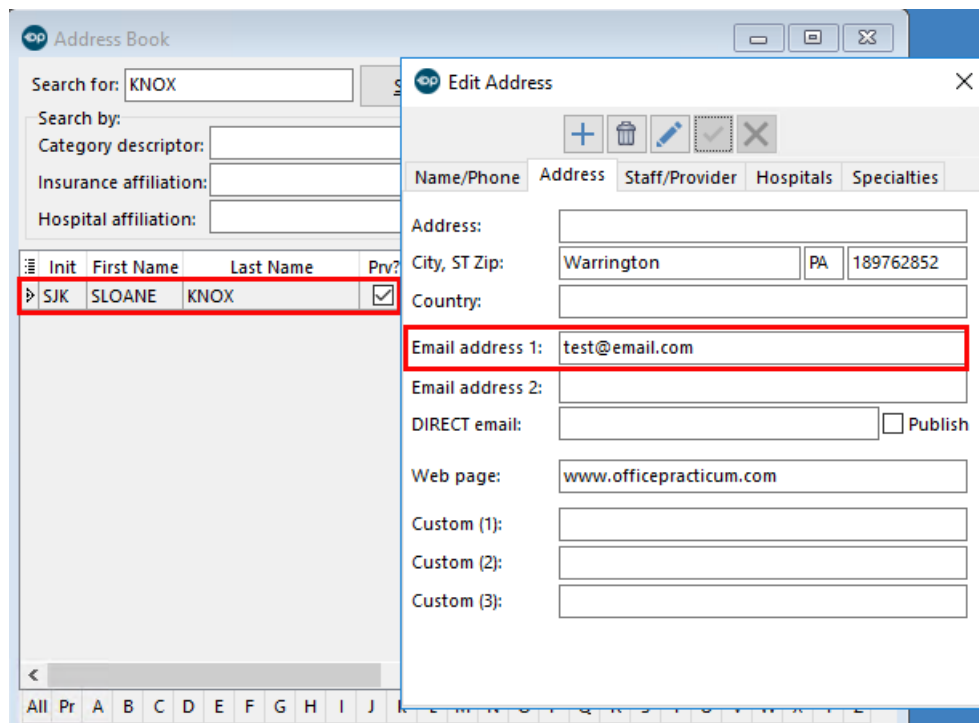
Register to Use the Ideas Portal

To register and/or login to the OP Ideas Portal, go to <https://ideasportal.officepracticum.com/>. This is accessible from within OP via the **Ideas Portal** button located in the **Help** tab.

Here, you'll enter your email address. Registration requires that you enter your email address and a password along with your first name and last name. Each subsequent login will only require your email address and password.



Note: It is important to register using the same email address as the one entered in your OP Address Book record. This is the address book record that has initials next to the name. We are using Single Sign-On (SSO) technology which will eventually enable users to log into multiple OP software applications with the same email credentials entered in the OP Address Book.



The screenshot shows the 'Address Book' application with a search for 'KNOX'. A table lists contacts, with 'SJK SLOANE KNOX' selected. The 'Edit Address' window is open, showing fields for Name/Phone, Address, City, ST, Zip, Country, Email address 1, Email address 2, DIRECT email, Web page, and Custom fields. The 'Email address 1' field is highlighted with a red box and contains the text 'test@email.com'.

Init	First Name	Last Name	Priv:
SJK	SLOANE	KNOX	<input checked="" type="checkbox"/>

Edit Address

Name/Phone: _____

Address: _____

City, ST Zip: Warrington PA 189762852

Country: _____

Email address 1: test@email.com

Email address 2: _____

DIRECT email: _____ Publish

Web page: www.officepracticum.com

Custom (1): _____

Custom (2): _____

Custom (3): _____

Log In to the Ideas Portal

Go to <https://ideasportal.officepracticum.com/> and enter your login credentials on the Log In tab. If you have forgotten your

password, click the **Don't remember your password?** link. You will be prompted to enter your email address to receive password reset instructions.

After logging in to the OP Ideas Portal, you will be presented with a list of ideas submitted by members of the OP community from across the country.



The screenshot shows the 'The OP Ideas Portal' interface. At the top, there's a header with the OP logo and 'Office Practicum'. Below the header is a navigation bar with 'Add a new idea', 'Recent', 'Trending', and 'Popular' tabs, along with a search box. On the left side, there's a sidebar with 'My Ideas' (50) and 'My votes' (0). Below that are 'FILTER BY STATUS' and 'FILTER BY CATEGORY' sections. The main content area displays three ideas, each with a 'VOTE' button (0 votes) and a 'Further consideration' button. The ideas are: 'Ability to Personalize a Message on Patient Statements', 'Ability to Print School Excuse Note from Tracking Screen', and 'Practice Preference for Vaccine Deferral Default Date'. A fourth idea, 'Vaccine ordering Filtered List', is partially visible at the bottom.

Getting Around the Ideas Portal

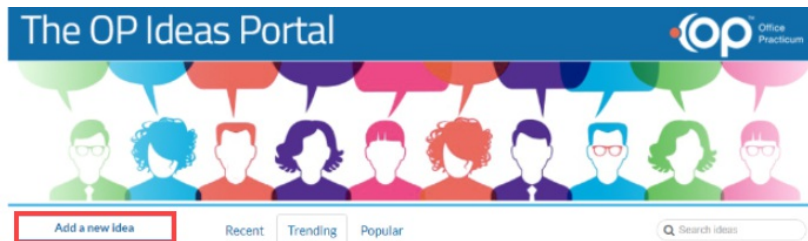
Here are some general navigation notes about the Ideas Portal:

- The navigation bars on the left and across the top allow you to filter the ideas. In addition, there is a **Search** box that allows you to filter ideas based on keywords.
- Upon login, the navigation bar across the top defaults to Trending ideas. However, you may also filter by the **Most Recent** or **Most Popular** ideas.
- The options on the left side of the window allow you to filter ideas by the following:
 - **My ideas:** The ideas you previously submitted and are marked publicly visible by the OP Product Team.
 - **My votes:** Ideas submitted by others where you previously cast a supporting vote.
 - **Status:** Where the idea stands in the OP Ideas process. Read about [how an idea becomes a feature](#) for more information about each status.
 - **Category*:** Each idea submitted must be assigned to one of the following categories. We created these categories as a means of organizing the ideas into logical areas within your workflow but at a high level in order to keep it simple.
 - Administrative Functions
 - Clinical Quality Improvement
 - Information Management

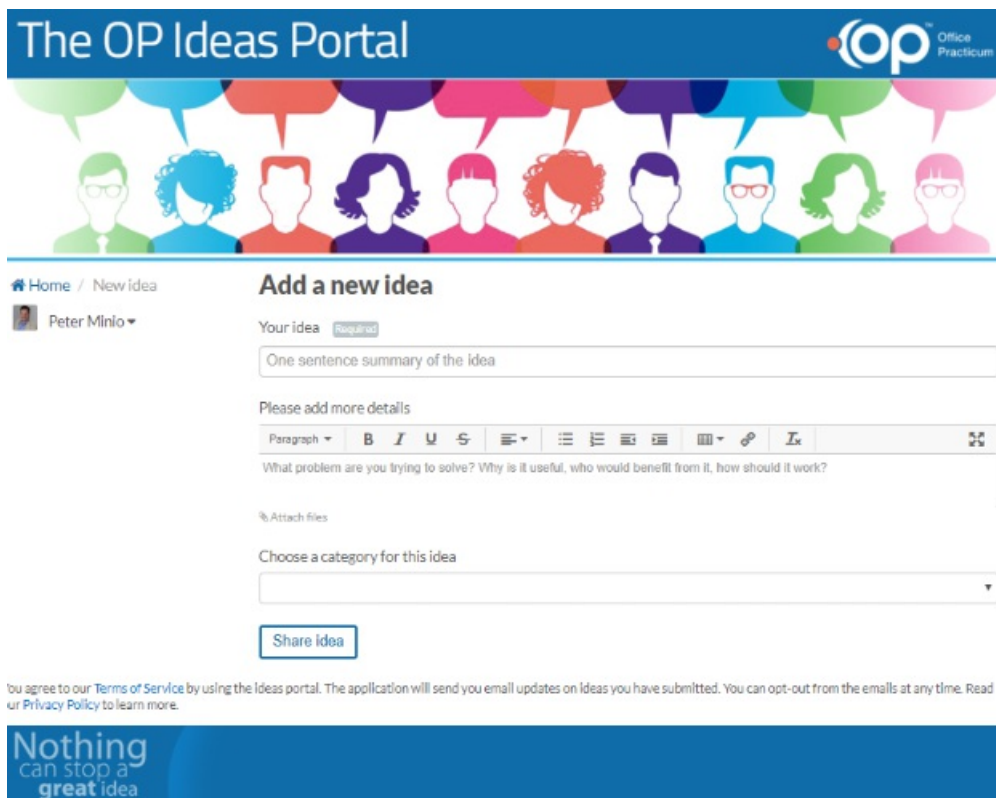
- Other
- Patient Chart Management
- Patient Demographics & Contact Management
- Reports & Forms
- Schedule
- Visit Notes

Add a New Idea

1. To submit your own idea, click the **Add a new idea** link on the top left.



2. A window is displayed where you'll enter information and submit your idea to the OP Product Team.



- **Your Idea:** A single-sentence summary of your idea (e.g., I want to ePrescribe medications).
- **Please add more details:** Explain your idea in a way that helps us understand the problem you are trying to solve.
- **Choose a category for this idea:** Select a category that best fits the idea as it fits into your workflow.

3. Click the **Share Idea** button. Your idea is submitted to the OP Product Team for review. If your idea is already a feature in OP, or we choose not to pursue your idea, we'll let you know. We may also reach out to you for clarification. If it is a reasonable idea, we will approve it and make it publicly visible for the rest of the OP community to cast supporting votes. At that point, you and others will also be able to submit comments on the idea. These comments are visible to everyone within the OP community. Please read our [privacy policy](#) for more information.

