OP Notify: Roles

Last Modified on 01/29/2021 3:36 pm EST

Version 14.19

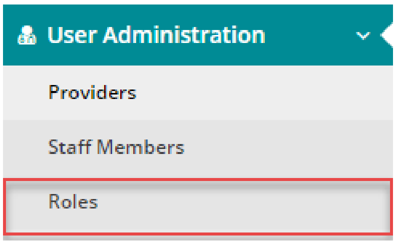
This article is part of the **OP Notify Training Program**.

Overview

The Roles functionality enables you to assign permissions to a role. When you assign a role to a user, the user has all of the permissions associated with that role. You must have the appropriate permission to access the Roles option from the menu. It is recommended that a role is duplicated and not added.

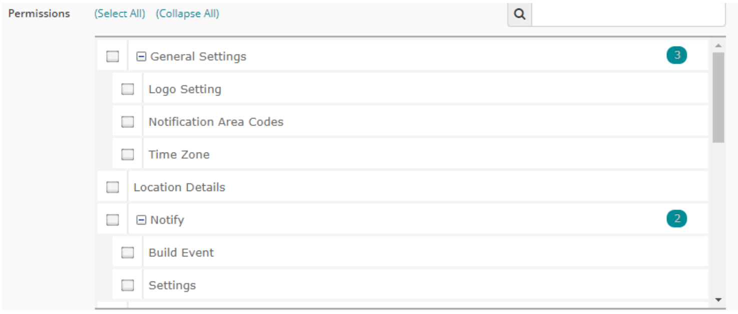
Add a Role

1. Access OP Notify using the email address and password set up through your account activation.
2. Click the drop-down arrow on the top Patient Portal bar and select the practice.
3. Click the **User Administration** drop-down arrow to expand the selections.
4. Select **Roles**.



5. Click the **Add Role** button. The New Role pane displays.

6. Confirm the **Active** checkbox is selected.
7. Enter the name for the role in the **Name** field.
8. (*Optional*) Further describe the role in the **Description** field.
9. Select the role permissions by performing one of the following:
   - Click **Select All** to include all permissions.
   - Click **Expand All** and select the permissions from the expanded list.



10. Click the **Save** button.

Duplicate a Role

1. Access OP Notify using the email address and password set up through your account activation.
2. Click the drop-down arrow on the top Patient Portal bar and select the practice.
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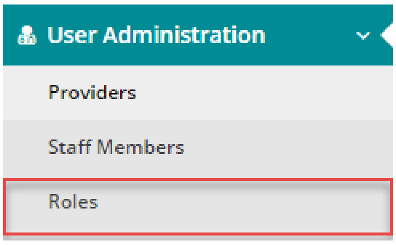
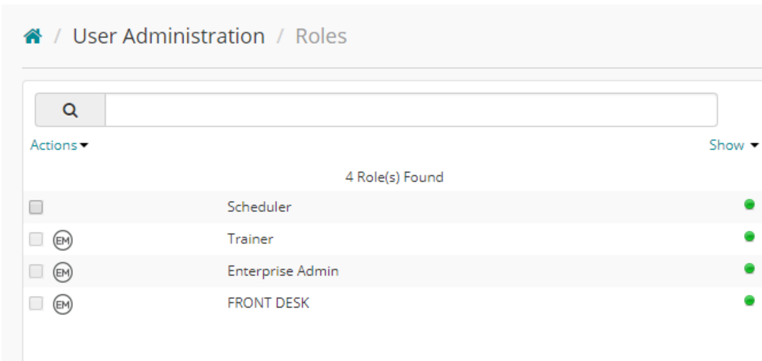
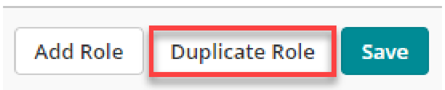
4. Select **Roles**.



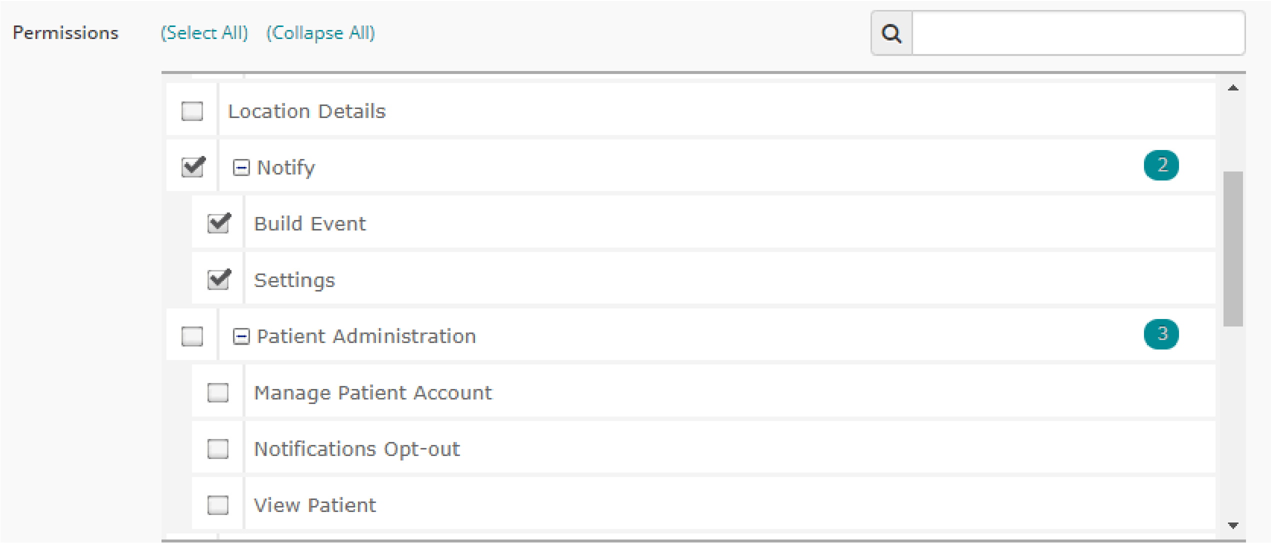
5. Select the role to duplicate from the **User Administration / Roles** list.



6. Click the **Duplicate Role** button.



7. Confirm the **Active** checkbox is selected.
8. Enter the name for the role in the **Name** field.
9. (*Optional*) Further describe the role in the **Description** field.
10. Click **Expand All** in the permissions group to view permissions duplicated from the selected role.



11. Select or deselect permissions for the new role.
12. Click the **Save** button.

Version 14.10

WARNING: This information is intended only for clients currently in the implementation or production phase with OP Notify functionality.

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Add a Role

1. Access OP Notify using the email address and password set up through your account activation.
2. Click the dropdown arrow on the top Patient Portal bar and select the practice.
3. Click the **User Administration** dropdown arrow to expand the selections.
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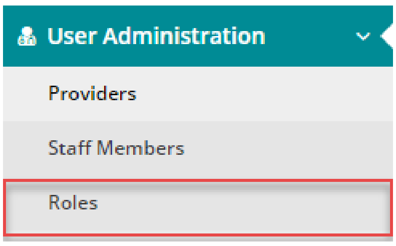
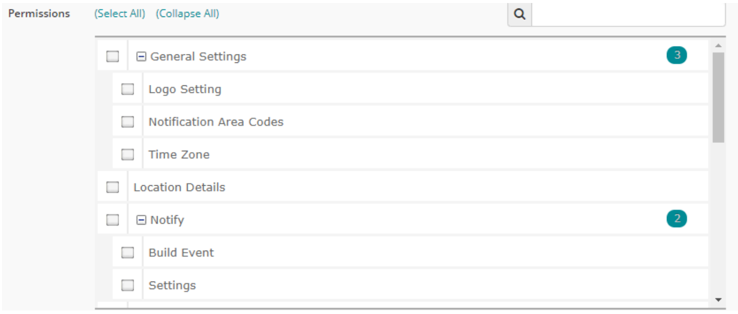


5. Click the **Add Role** button. The New Role pane displays.

6. Confirm the **Active** checkbox is selected.
7. Enter the name for the role in the **Name** field.
8. (Optional) Further describe the role in the **Description** field.
9. Select the role permissions by performing one of the following:

- Click **Select All** to include all permissions.
- Click **Expand All** and select the permissions from the expanded list.



10. Click the **Save** button.

Duplicate a Role

1. Access OP Notify using the email address and password set up through your account activation.
2. Click the dropdown arrow on the top Patient Portal bar and select the practice.
3. Click the **User Administration** dropdown arrow to expand the selections.
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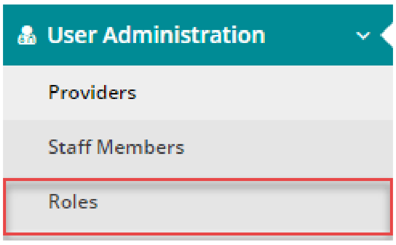
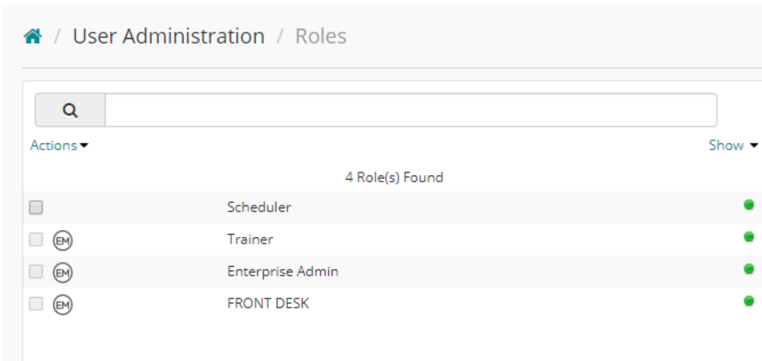
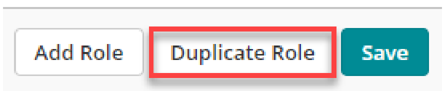


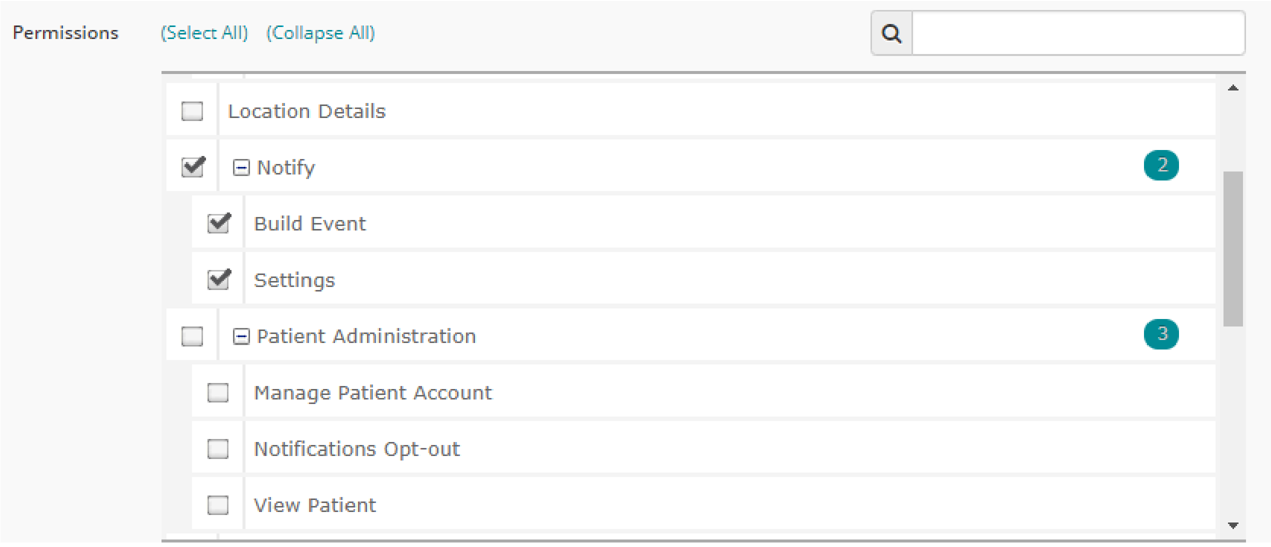
5. Select the role to duplicate from the **User Administration / Roles** list.



6. Click the **Duplicate Role** button.



7. Confirm the **Active** checkbox is selected.
8. Enter the name for the role in the **Name** field.
9. (Optional) Further describe the role in the **Description** field.
10. Click **Expand All** in the permissions group to view permissions duplicated from the selected role.



11. Select or deselect permissions for the new role.
12. Click the **Save** button.

Version 14.8

OP Notify was implemented in Version 14.9.