



Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

OP Notify: Staff and Providers

Last Modified on 01/29/2021 3:37 pm EST

Version 14.19

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

Add Non-Clinical Staff

All users working in OP Notify will be created as Staff by the Practice Administrator. The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Staff Members option from the menu.

- 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 Staff Members. The User Administration/Staff Administration pane appears.



5. Click the + Add Staff button. The Add New Staff pane displays and is ready for a Staff Member to be added.



- 6. Confirm the Active checkbox is selected.
- 7. Enter the email address of the new staff member in the Email field.



Note: Each staff member must have a unique email address. The email address will be the login for OP Notify. If staff will share a practice email address, you may create the email using the following format: [practiceemail+1]@domain name. Example: scheduling+1@abcpeds.com

- 8. Select the radio button for determining when a confirmation email is sent:
 - **Send confirmation email now**: An email is sent to the staff member when the record is saved. This email is used to complete the account activation.
 - Send confirmation email on: An email for the staff member to complete the account activation is sent at the selected date.
 - Send confirmation email manually: An action must be taken to send the email after the staff member's record is saved
- 9. Confirm Staff Member is selected for User Type.



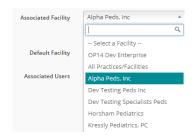
- 10. Complete the Display Name fields (Prefix, First Name, Middle Name, Last Name, Suffix).
- Leave the following fields blank: Biography, Phone, and Photo.



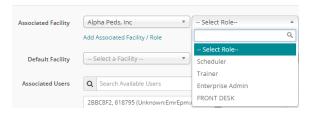


12. Complete the Staff Details:

a. Click the drop-down for Associated Facility and select the practice the staff member will need to work in OP Notify.



b. Click the drop-down for Select a Role and select the role the staff member will be assigned when working in OP Notify.



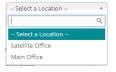


Note: If the staff member will be working in multiple facilities, click the **Add Associated Facility / Role** and repeat the steps.

c. Click the drop-down for Default Facility and select the practice that will default when logging into OP Notify (equired).



d. Click the drop-down and select a location in the Select a Location field.





Note: If the new staff will be working in multiple locations, the default facility and location will allow the staff to begin at the designated selection once logged into OP Notify.

- e. Add the Associated User.
 - Highlight the staff name located in the panel on the left.
 - Click the right arrow to move the selected staff to the panel on the right.
- 13. Leave the following fields blank: Appointment Resources, Delegates and Permissions.
- 14. Click the Save button.

Add Clinical Staff

All clinical users working in OP Notify will be created as Staff by the Practice Administrator. Staff members that have a clinical level of Clinical Staff of higher in OP will be found in the provider list. The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Staff Members option from the menu.





- 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 Providers. The User Administration/Provider Administration pane appears.
- 5. Click the + Add Provider button. The Add New Provider pane displays and is ready for a Provider to be added.
- 6. Confirm the Active checkbox is selected.
- 7. Enter the email address of the clinical member in the **Email** field.
- 8. Select the radio button when a confirmation email is sent using the following:
 - Send confirmation email now: An email is sent to the provider when the record is saved. This email is used to
 complete the account activation.
 - Send confirmation email on: An email for the provider to complete the account activation is sent at the selected date.
 - Send confirmation email manually: An action must be taken to send the email after the provider's record is saved.
- 9. Select the Staff Member radio button for User Type, Provider will be selected by default.



- 10. Complete the Display Name fields (Prefix, First Name, Middle Name, Last Name, Suffix).
- 11. Leave the following fields blank: Biography, Phone, and Photo.
- 12. Complete the Provider Details:
 - a. Click the drop-down for Associated Facility and select the practice the staff member will need to work in OP Notify.
 - b. Click the drop-down for Select a Role and select the role the staff member will be assigned when working in OP Notify.



Note: If the staff member will be working in multiple facilities, click the **Add Associated Facility / Role** and repeat the steps.

- c. Click the drop-down for Default Facility and select the practice that will default when logging into OP Notify (equired).
- d. Click the drop-down and select a location in the Select a Location field.
- e. Add the Associated User.
 - · Highlight the clinical staff name located in the panel on the left.
 - Click the right arrow to move the selected staff to the panel on the right.
- f. Deselect the Appointment Requests checkbox if available.
- g. All other fields are not required, leave the remaining fields .
- 13. Click the Save button.



Note: Confirm the clinical staff is in the staff list by navigating to User Administration > Staff Members.

Add a Practice Provider

All users requiring appointment reminders to be sent using OP Notify will be created as Providers. Providers will be added by the Practice Administrator. The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Providers option from the menu.

- 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 Providers. The User Administration/Provider Administration pane appears.







- 5. Click the + Add Provider button. The Add New Provider pane displays and is ready for a Provider to be added.
- 6. Confirm the Active checkbox is selected.
- 7. Enter the email address of the new provider member in the Email field.



Note: Each provider added must have a unique email address. The email address will be the login for OP Notify. If providers will share a practice email address you may create the email using the following format: [practiceemail+1]@domain name. Example: providers+1@abcpeds.com

- 8. Select the radio button when a confirmation email is sent using the following:
 - Send confirmation email now: An email is sent to the provider when the record is saved. This email is used to complete the account activation.
 - Send confirmation email on: An email for the provider to complete the account activation is sent at the selected date.
 - Send confirmation email manually: An action must be taken to send the email after the provider's record is saved.



Note: Typically a provider will not login and use OP Notify so it is recommended all providers are set t**Send confirmation email manually**. If the provider is requesting access to OP Notify you may select one of the other options.

- 9. Confirm Provider is selected for User Type.
- 10. Complete the Display Name fields (Prefix, First Name, Middle Name, Last Name, Suffix).

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Note: The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.

- 11. (Optional) Enter the phonetic spelling of the Provider's name:
 - a. Enter the phonetic spelling of the Provider's name in the {\it First Name} and ${\it Last Name}$ fields.



- b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based upon the phonetic spelling you've entered.
- c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.
- 12. Select the provider gender.
- 13. The following fields are optional: Biography, Specialty, Languages, Phone, and Photo.
- Complete the Provider Details:





- a. Click the drop-down for Associated Facility and select the practice.
- b. Click the drop-down for Select a Role and select the role the provider will be assigned if working in OP Notify.



Note: If the provider is associated to multiple facilities, click the Add Associated Facility / Role and repeat the steps.

- c. Click the drop-down for Default Facility and select the practice that will default when logging into OP Notify (equired).
- d. Click the drop-down and select a location in the Select a Location field.
- e. Add the Associated User:
 - · Highlight the clinical staff name located in the panel on the left.
 - . Click the right arrow to move the selected staff to the panel on the right.
- f. Confirm the Appointment Requests checkbox is selected.
- g. All other fields are not required, leave the remaining fields .
- 15. Click the Save button.

Add a Generic Provider

Setting up OP Notify requires the creation of a Generic Provider. The Generic Provider is used for appointment reminders the Practice has scheduled for non-provider staff (such as, Nurse, Flu Clinic or Lactation). The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Providers option from the menu.

- 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 Providers. The User Administration/Provider Administration pane appears.
- 5. Click the + Add Provider button. The Add New Provider pane displays and is ready for a Provider to be added.
- 6. Confirm the Active checkbox is selected.
- 7. Enter the email address of the generic provider in the Email field.



Note: Each provider added must have a unique email address. It is a Best Practice to use the email address of the practice administrator using the format: [practiceadminemail+1]@domain name. Example: administrator+1@abcpeds.com.

- 8. Select the Send confirmation email manually radio button.
- 9. Confirm Provider is selected for User Type.
- 10. Complete the Display Name fields as follows:
 - First name: Generic
 Last name: Provider



Note: The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.

- 11. (Optional) Enter the phonetic spelling of the Provider's name:
 - a. Enter the phonetic spelling of the Provider's name in the First Name and Last Name fields.
 - b. Ensure the speaker on your workstation is turned on and click the Play button to listen to the pronunciation of the





Provider's name based upon the phonetic spelling you've entered.

- c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.
- 12. Select the provider gender.
- 13. The following fields are optional: Biography, Specialty, Languages, Phone, and Photo.
- 14. Complete the Provider Details:
 - a. Click the drop-down for Associated Facility and select the practice.
 - b. Click the drop-down for Select a Role and select the role the provider will be assigned if working in OP Notify.



Note: If the generic provider is associated to multiple facilities, click the **Add Associated Facility / Role** and repeat the steps.

- c. Click the drop-down for **Default Facility** and select the practice (required).
- d. Click the drop-down and select a location in the Select a Location field.
- e. Add the Associated User.
 - Highlight the provider, [practicename] Generic Provider, located in the panel on the left.
 - Click the right arrow to move the selected staff to the panel on the right.
- f. Confirm the Appointment Requests checkbox is selected.
- g. All other fields are not required, leave the remaining fields .
- 15. Click the Save button.

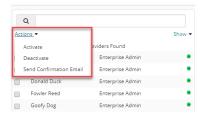
Staff Administration

You must have the appropriate permission to access the User Administration/Staff Members or Providers option from the menu.

Activate, Deactivate, or Send Confirmation Email

To activate, deactivate, or send a confirmation email to a staff member or provider, follow the steps below:

- 1. Click the User Administration drop-down arrow to expand the selections.
- 2. Select Staff Members or Providers.
- 3. Select the checkbox to the left of the staff member or provider name.
- 4. Click the Actions drop-down arrow and select the action from the list.



Filter Staff Member or Provider List

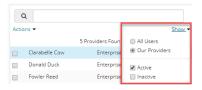
To filter the staff member or provider list in order to view active and inactive users, follow the steps below.

- 1. Click the User Administration drop-down arrow to expand the selections.
- 2. Select Staff Members or Providers.
- 3. Click the Show drop-down arrow and select from the following:
 - All Users: Lists all staff or providers associated to the Practice Enterprise.





- Our Staff: List of staff or providers associated to the Practice.
- · Active: Show staff or providers that are active.
- Inactive: Show staff or providers that are inactive.



Version 14.10



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

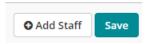
Add Staff

All users working in OP Notify will be created as Staff by the Practice Administrator. The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Staff Members option from the menu.

- 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.
- 4. Select Staff Members. The User Administration/Staff Administration pane appears.



• 5. Click the + Add Staff button. The Add New Staff pane displays and is ready for a Staff Member to be added.



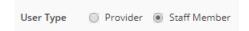
- 6. Confirm the **Active** checkbox is selected.
 - 7. Enter the email address of the new staff member in the Email field.

Each staff member must have a unique email address. The email address will be the login for OP Notify. If staff will share a practice email address, you may create the email using the following format: [practiceemail+1]@domain name. Example: scheduling+1@abcpeds.com

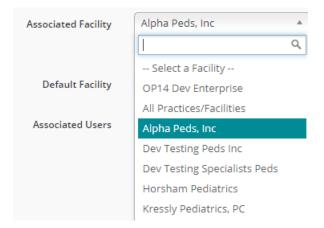
- 8. Select the radio button for determining when a confirmation email is sent:
 - Send confirmation email now: An email is sent to the staff member when the record is saved. This email is used to complete the account activation.
 - Send confirmation email on: An email for the staff member to complete the account activation is sent at the selected date.
 - Send confirmation email manually: An action must be taken to send the email after the staff member's record is saved.
- 9. Confirm Staff Member is selected for User Type.



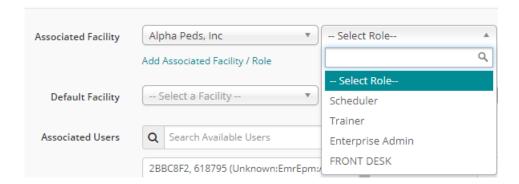




- 10. Complete the **Display Name** fields (Prefix, First Name, Middle Name, Last Name, Suffix).
 - 11. Leave the following fields blank: Biography, Phone, and Photo.
 - 12. Complete the Staff Details:
 - Associated Facility.
 - Select a Facility. Click the dropdown and select the practice the staff member that will need to work in OP Notify.



 Select a Role: Click the dropdown and select the role the staff member will be assigned when working in OP Notify.



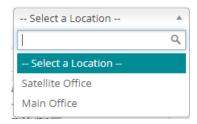
- o Default Facility:
 - Click the dropdown for **Default Facility** and select a practice (Required field).



- Click the dropdown and select a location in the Select a Location field.
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Note: If the new staff will be working in multiple locations, the default facility and location will allow the staff to begin at the designated selection once logged into OP Notify.

- Associated User:
 - Highlight the staff name located in the panel on the left.
 - · Click the right arrow to move the selected staff to the panel on the right.
- 13. Leave the following fields blank: Appointment Resources, Delegates and Permissions.
- 14. Click the Save button.

· Add a Practice Provider

All users requiring appointment reminders to be sent using OP Notify will be created as Providers. Providers will be added by the Practice Administrator. The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Providers option from the menu.

- 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.
- 4. Select **Providers**. The User Administration/Provider Administration pane appears.



- 15. Click the + Add Provider button. The Add New Provider pane displays and is ready for a Provider to be added.
 - 16. Confirm the Active checkbox is selected.
 - 17. Enter the email address of the new provider member in the Email field.
 - Each provider added must have a unique email address. The email address will be the login for OP Notify. If providers will share a practice email address you may create the email using the following format: [practiceemail+1]@domain name. Example: providers+1@abcpeds.com
 - 18. Select the radio button when a confirmation email is sent using the following:
 - **Send confirmation email now**: An email is sent to the provider when the record is saved. This email is used to complete the account activation.
 - Send confirmation email on: An email for the provider to complete the account activation is sent at the selected date.
 - Send confirmation email manually: An action must be taken to send the email after the provider's record is saved.

Typically a provider will not login and use OP Notify so it is recommended all providers are set tsend

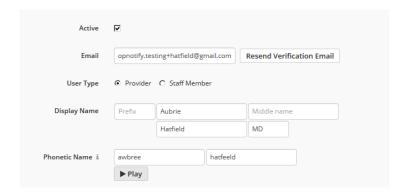




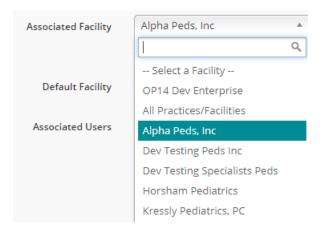
- confirmation email manually. If the provider is requesting access to OP Notify you may select one of the other options.
 - 19. Confirm Provider is selected for User Type.
 - 20. Complete the Display Name fields (Prefix, First Name, Middle Name, Last Name, Suffix).

The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add

- New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.
 - 21. (Optional) Enter the phonetic spelling of the Provider's name:
 - a. Enter the phonetic spelling of the Provider's name in the First Name and Last Name fields.



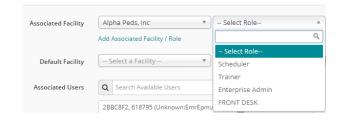
- b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based upon the phonetic spelling you've entered.
 - c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.
 - 22. (Optional) Select the provider gender.
 - 23. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.
 - 24. Complete the Provider Details:
 - Associated Facility.
 - · Select a Facility. Click the dropdown and select the practice the provider that will need to work in OP Notify.



 Select a Role: Click the dropdown and select the role the staff member will be assigned when working in OP Notify.



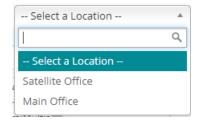




- o Default Facility:
 - Click the dropdown for **Default Facility** and select a practice (Required field).



• Click the dropdown and select a location in the Select a Location field.



- Associated User.
 - Highlight the provider name located in the panel on the left.
 - Click the right arrow to move the selected provider to the panel on the right.
 - 25. Confirm the **Appointment Requests** checkbox is selected for Appointment Resources.
 - 26. Click the Save button.

Add a Generic Provider

Setting up OP Notify requires the creation of a Generic Provider. The Generic Provider is used for appointment reminders the Practice has scheduled for non-provider staff (such as, Nurse, Flu Clinic or Lactation). The person designated as the Practice Administrator must have the appropriate permission to access the User Administration/Providers option from the menu.

- 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.
- 4. Select Providers. The User Administration/Provider Administration pane appears.



- 27. Click the + Add Provider button. The Add New Provider pane displays and is ready for a Provider to be added.
 - 28. Confirm the Active checkbox is selected.





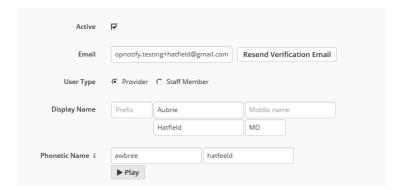
29. Enter the email address of the new provider member in the Email field.

- Each provider added must have a unique email address. It is a Best Practice to use the email address of the practice administrator using the format: [practiceadminemail+1]@domain name. Example: administrator+1@abcpeds.com.
 - 30. Select the Send confirmation email manually radio button.
 - 31. Confirm Provider is selected for User Type.
 - 32. Complete the Display Name fields as follows:

First name: GenericLast name: Provider

The optional Phonetic Name feature helps to ensure that voicemail communication pronounces the names of Providers correctly by allowing the end user to spell the name phonetically (in the Phonetic Name field on the Add

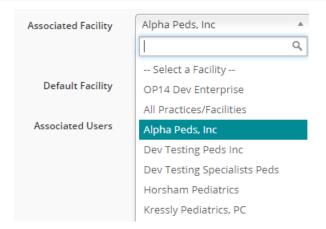
- New Staff window). Clicking the Play button activates a voice playback that pronounces the name as spelled. This Play feature allows the end user to modify the phonetic spelling until the pronunciation is exact. This feature applies only to adding Providers in User Administration.
 - 33. (Optional) Enter the phonetic spelling of the Provider's name:
 - a. Enter the phonetic spelling of the Provider's name in the First Name and Last Name fields.



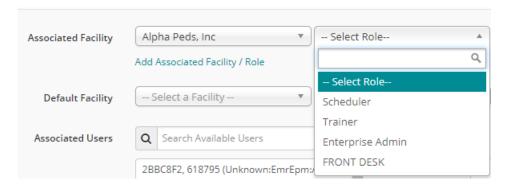
- b. Ensure the speaker on your workstation is turned on and click the **Play** button to listen to the pronunciation of the Provider's name based upon the phonetic spelling you've entered.
 - c. Adjust the phonetic spelling until the playback pronounces the Provider's name exactly.
 - 34. (Optional) Select the provider gender.
 - 35. Leave the following fields blank: Biography, Specialty, Languages, Phone, and Photo.
 - 36. Complete the Provider Details:
 - Associated Facility:
 - Select a Facility. Click the dropdown and select the practice the generic provider that will need to work in OP Notify..







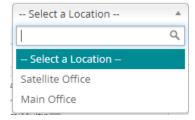
 Select a Role: Click the dropdown and select the role the generic provider will be assigned when working in OP Notify.



- o Default Facility:
 - Click the dropdown for **Default Facility** and select a practice (Required field).



Click the dropdown and select a location in the Select a Location field.



- - Highlight the provider, [practicename] Generic Provider, located in the panel on the left.
 - Click the right arrow to move Generic Provider to the panel on the right.
 - 37. Confirm **Appointment Requests** checkbox is selected for Appointment Resources.
 - 38. Click the Save button.





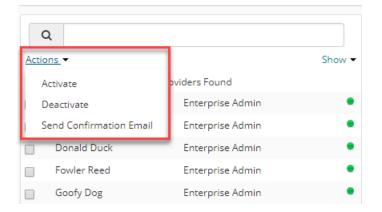
Staff Administration

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Activate, Deactivate, or Send Confirmation Email

To activate, deactivate, or send a confirmation email to a staff member or provider, follow the steps below:

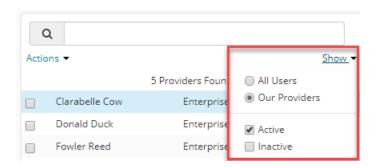
- 1. Click the User Administration dropdown arrow to expand the selections.
- 2. Select Staff Members or Providers.
- 3. Select the checkbox to the left of the staff member or provider name.
- 4. Click the Actions dropdown arrow and select the action from the list.



Filter Staff Member or Provider List

To filter the staff member or provider list in order to view active and inactive users, follow the steps below.

- 1. Click the User Administration dropdown arrow to expand the selections.
- 2. Select Staff Members or Providers.
- 3. Click the Show dropdown arrow and select from the following:
 - All Users: Lists all staff or providers associated to the Practice Enterprise.
 - Our Staff: List of staff or providers associated to the Practice.
 - Active: Show staff or providers that are active.
 - o Inactive: Show staff or providers that are inactive.



• Version 14.8

OP Notify was implemented in Version 14.9.





