OP Getting Started FAQs

How do I customize the ribbon?

> **Note**: The Ribbon is driven by permissions. If your permissions do not grant you access to certain features or areas of the software, you still may not see all of the tabs that have been selected in the Customize the Ribbon window.

To customize your ribbon:

1. Right-click in any area of the button groups within a tab.
2. Select **Customize the Ribbon**.
3. In the **Choose Commands From** panel to the left, select the tabs to display on the ribbon. Use the right arrow to move them over to the **Customize the Ribbon** panel to the right.
4. Ensure that the checkboxes for the tabs you want to display in the ribbon are selected.
5. You can customize the left-to-right sequence of tabs on the ribbon by selecting a tab in the **Customize the Ribbon** panel and using the up or down arrows to the right.
6. Click **OK** to save your work.

How do I revert my ribbon settings to their default settings?

To revert your Ribbon settings to their default settings:

1. Right-click in the blue ribbon area.
2. Select **Customize the Ribbon**.
3. Select the **Reset** dropdown arrow in the bottom left corner of the **Ribbon Customization** window.
4. Select the desired option (either **Reset Only Selected Tab** or **Reset All Customizations**).
5. Click **OK** to save your work.

How do I pin the ribbon?

You can pin the ribbon by clicking on the small, gray down arrow at the far right of the ribbon.

How do I collapse the ribbon?

You can collapse the ribbon by clicking on the small, gray up arrow at the far right of the ribbon or by right-clicking in the ribbon and selecting **Minimize the Ribbon**.

How do I get my ribbon to display?

If you've collapsed your ribbon and would like to view it again, click on one of the tabs in the ribbon. This displays the ribbon.

If after displaying your ribbon you'd like to pin it, click on the small, gray down arrow at the far right of the ribbon.

How do I change the display of my ribbon?

Aside from customizing the ribbon, you can also change which information shows on the ribbon. To change the ribbon display, select the **Ribbon Display Options** button in the top right corner of the ribbon. Three options are available:

- **Auto-hide Ribbon:** This will hide the ribbon entirely. Click at the top of the application to show it whenever it's needed.
- **Show Tabs:** This will show the ribbon tabs only (the blue bar across the top). Click a tab to show the commands.
- **Show Tabs and Commands:** Show the ribbon tabs (the blue bar across the top) and commands (the gray bar below the blue bar) all the time.

Where is the Chart Rack in OP 19?

The Chart Rack in OP 14 was replaced by the tabbed interface in OP 19. To enable this view in OP 19:

1. Select the **Personalize** tab**.**
2. Select the **Use tabbed interface** checkbox.
3. Click the **Active Form** button.
4. Click **OK** to save the settings.

Click **here** to view the **Using Tabbed Interface and Multi-Patient Mode** video**.**

How do I collapse the main navigation panel?

To collapse the main navigation panel, click on the **Collapse** button at the top left of the main navigation panel.

How do I expand the main navigation panel?

To expand the main navigation panel, click on the **Expand** button at the top of the main navigation panel.

How do I change the sort order of groups on the main navigation panel?

To change the sort order on the main navigation panel, click on and drag the group heading into the order you prefer.

What do the numbers represent in the badges on the main navigation panel?

The numbers within the badges on the Main Navigation Panel represent how many outstanding items need to be reviewed need reviewed. These could be messages, clinical documentation, or billing-related items.

Why are there badges displayed under the clinical group on the main navigation panel?

In the Clinical group on the main navigation panel, blue badges are a visual indication of outstanding clinical items that need

attention by the logged-in user.

- **Encounters:** Unfinalized Encounter notes needing to be finalized.
- **Well Visits:** Unfinalized Well Visit notes needing to be finalized.
- **Received:** Received Diagnostic Tests needing review.
- **Reviewed:** Reviewed Diagnostic Tests.
- **Referrals:** Referrals past their flagged date.
- **Documents:** Documents and Scans needing review.
- **Surveys:** Administered Surveys needing review.
- **e-Prescribing:** Prescriptions needing review/attention.
- **Refill Requests:** Unprocessed refill requests needing to be processed.

Why are there badges displayed under the billing group on the main navigation panel?

On the main navigation panel, visual indicators in the form of badges display to alert the billing team of outstanding items that need attention.

- **Claims:** Claims that have been created but not queued.
- **Superbills:** Unprocessed Charges older than 30 days.
- **Rejections:** Claims that have been rejected and not fixed aged 90 days.
- **Queue:** Claims that have been queued but not sent.
- **Remits:** Checks that have been received but not fully posted.
- **Not Ack (Acknowledged):** Claims that have been sent but not acknowledged for 90 days.

Why are there badges displayed under the messaging group on the main navigation panel?

In the **Messaging** group on the Main Navigation Panel, blue badges are a visual indication of outstanding messages that need attention. The badge turns red if a phone (internal) message is marked as urgent.

- **Phone:** Unread Phone (Internal) Messages.
- **Portal:** Unread Portal Messages.
- **External:** Unread External (Direct) Messages.
- **Need Action:** Messages that are marked as Need Action. This badge is always red if it is present.
- **Instant:** An unread Instant Message.

Note: Instant Messages are *not* tied to a patient chart and therefore should not be used as a means of documentation regarding a patient.

Why are there badges displayed next to the tabs in the Message Center?

In the Message Center, blue badges and their respective numbers within them, are a visual indication of outstanding messages that need attention based on the scope of search being used for each tab. The badge turns red if a phone (internal) message is marked as urgent or if there are items displayed under the Need Action tab. You can expand the scope of your search from just yourself to other team members or everyone based on user permissions. The Confidential: Include EFR checkbox may also be selected to broaden your results. The keyword search feature searches based on the active tab. Date ranges can also be implemented on the Read and Sent tabs, but are not available on the Unread Phone, Unread Portal, Unread External or Need Action tabs.

Why are there badges displayed next to the tabs in the Clinical Work Navigation Panel?

In the Clinical Work Navigation Panel, blue badges and their respective numbers within them, are a visual indication of outstanding items that need attention based on the scope of search being used for each tab. Users can expand their scope of search from "Me" to other team members or everyone based on their user permissions. The Confidential: Include EFR checkbox and date ranges may also be used to broaden your results.

Why is my Patient Encounter screen blank?

The user preference for the preferred default tab needs to be saved. To select a default tab:

1. Choose which tab you'd like to have your encounters automatically open to and right-click on that tab in the Patient Encounter Navigation Panel.
2. Select **Always open on ____**.
3. Click personalize on the ribbon
4. Select **Active** Form.
5. Confirm the change.
6. Log out and log back in to see the updated change.

Why is my Patient Well Visit screen blank?

The user preference for the preferred default tab needs to be saved. To select a default tab:

1. Choose which tab you'd like to have your Well Visit automatically open to and right-click on that tab in the Well Visit Navigation Panel.
2. Select **Always open on ____**.
3. Click personalize on the ribbon.
4. Select **Active Form**.
5. Confirm the change.
6. Log out and log back in to see the updated change.

How Do I Update Reports Not Outputting the Signature?

Click here for a detailed workaround for updating reports not outputting the signature.

How do I use the timestamp button?

The **Timestamp** button in OP can be used to insert the current date, current time, and user initials into a text field. To use the **Timestamp** button:

1. Click the **Timestamp** button located on the right-hand side of the ribbon.
2. Click into the text field where the timestamp should be applied.
3. On your keyboard, press the **Ctrl + v** keys to paste. The timestamp is applied.

You can also find the **Timestamp** button in various note windows. Simply double-click in the note box, and click the **Timestamp** button within the window. Then, click the **Save** button.

Note: The keyboard shortcut **Ctrl+t** can also be used to capture the timestamp and **Ctrl+v** to apply the timestamp.