How Clinical Data Flows to the OP Patient Portal

Last Modified on 01/13/2022 10:18 am EST

OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.8

Understanding how clinical data flows to the portal helps users identify if and when there is a true, reportable issue with data movement. In an effort to minimize the amount of traffic related to data movement to the OP Patient Portal, OP's process will load clinical data as needed, on a patient to patient basis, based on certain actions taken in OP. This means, at this point, clinical data from your database will not be immediately available on the OP Patient Portal until one of the following actions takes place. Once that data flow has been initiated, any updates to that data will flow to the OP Patient Portal, as incremental updates.

- **A new appointment is scheduled:** When you schedule an appointment for a patient, the process will begin to send that patient's clinical data to the OP Patient Portal.
- **A C-CDA is created:** When you initiate a C-CDA from OP, the process will begin to send that/those patient(s') clinical data. **Note**: The C-CDA process is designed to wait until patient clinical data has been delivered to the Portal. If this is the first time a patient's data is being sent to the OP Patient Portal, expect a slight delay so that the C-CDA process can ensure that the data has completed the journey to the OP Patient Portal. For more information, click **here**.
- **A Visit Note is finalized**: When an Encounter or Well Visit note is finalized, the process will begin to send the patient's clinical data.
- **A PIN is generated from OP**: When a PIN is generated from OP (not from InteliChart), the process will begin to send that patient's clinical data to the Portal. For more information on this process, click **here**.

Note: An additional trigger is also in place to push a patient's **Insurance** information to the portal. When an Insurance record is added or updated in a patient's Chart, that triggers the sending of the information to the portal.

The clinical data shared with the portal can be restricted, by date, if needed. See **System Preferences: Portal** to learn how to set that restriction. To ensure the privacy of patient items is maintained, it is recommended to review the privacy level on sensitive data (such as medications), and confirm the privacy is set to Clinical Staff or higher for those sensitive items.

Note: You may experience temporary delays in a patient's clinical data flowing to the OP Patient Portal due to the amount of data flowing all at once. Please be patient with the timing of the appearance of clinical data. The speed of data movement will improve as the backlog of data clears.