

Important Content Update Message



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

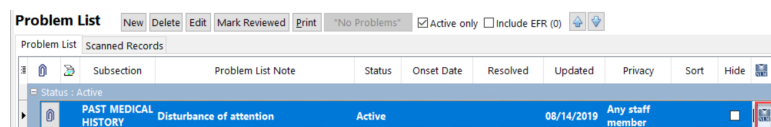
OP Patient Portal: Patient Education Workflow

Last Modified on 05/08/2020 10:04 am EDT

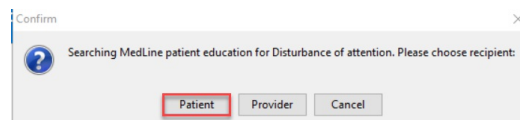
The content in this article is relevant to the OP Patient Portal, powered by IntelliChart.

Sending Patient Education: Problem List

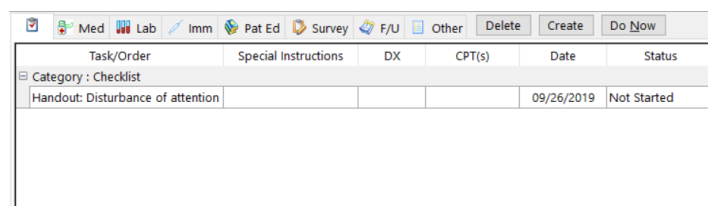
1. From an open Encounter or Well Visit note, click **Problem List**.
2. Highlight the problem and click the **Patient Education** button.



3. A confirmation window displays, click the **Patient** button.



4. The handout will appear in **Plan/Orders** in the task list.



Sending Patient Education: Medications

1. From an open Encounter or Well Visit note, click **Medications**.
2. Highlight the medication, and click the **Patient Education** button.

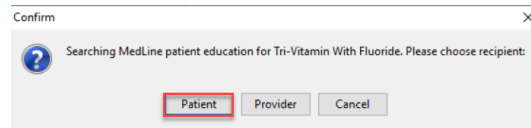
Medications Affirm "No Meds" Mark Reviewed Print Med List Interactions Validate Med History Refresh

No active medications

New Refill Edit Delete Send Cancel Print **Exit** Current meds only Extra notes Include EFR 0 Lines: 2

Start Date	Chronic	Status	Prescription	Refills	Days Supply	DAW	End Date	DX	-Prv-	Purpose	Pharmacist Note	Trans. Status
09/26/2019	N	ADDED	Tri-Vitamin With Fluoride drops 0.25 mg fluor.	2	60	N	03/24/2020			Cindy N, Med - to		

3. A confirmation window display, click the **Patient** button.



4. The handout will appear in **Plan/Orders** in the task list.

Task/Order	Special Instructions	DX	CPT(s)	Date	Status
Category: Checklist Handout: Tri-Vitamin With Fluoride				09/26/2019	Not Started
Category: Medications Tri-Vitamin With Fluoride drops 0.25 mg fluor. (0.55 mg)/mL Dispense: 60 (sixty) milliliter Take 1 mL by mouth once a day for 60 days Please use generic		Z00.129		09/26/2019	Completed

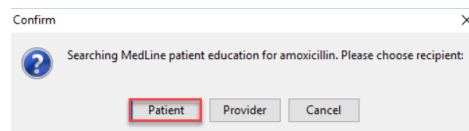
Sending Patient Education: Allergies

1. From an open Encounter or Well Visit note, click **Allergies**.
2. Highlight the allergy, and click the **Patient Education** button.

Allergies New Delete Edit Mark Reviewed Print 'No Med Allergies' Active only Include EFR (0)

Notes	Status	Onset Date	Resolved	Updated	Sort	Hide	Rx Norm
MEDICATION ALLERGY amoxicillin (Symptoms: Fever)	Active	07/01/2019		09/21/2019			S98025

3. A confirmation window displays, click the **Patient** button.



4. The handout will appear in **Plan/Orders** in the task list.

Task/Order	Special Instructions	DX	CPT(s)	Date	Status
Category: Checklist Handout: amoxicillin				09/26/2019	Not Started

Sending Patient Education: Assessment

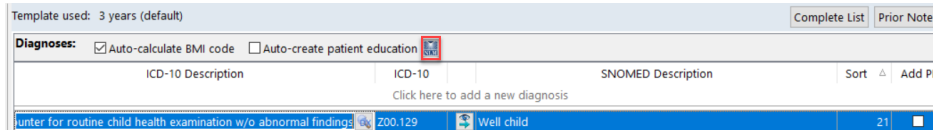
Warning: All diagnosis codes in the Assessment tab must be mapped to a SNOMED code to properly link educational handouts. The SNOMED can be added when charting a visit, the practice templates can be modified to include the SNOMED, or the practice can create a



cross mapping. Click a link below to view information on mapping SNOMED codes.

- [Cross Mapping SNOMED codes](#)
- [Add SNOMED code to a template](#)

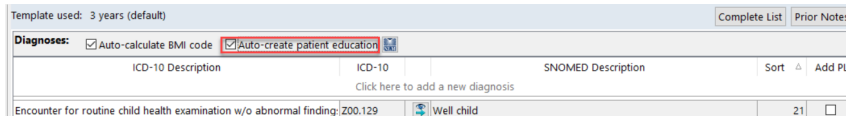
1. From an open Encounter or Well Visit note, click **Assessment**.
2. Highlight the diagnosis line and click the **Patient Education** button.



Template used: 3 years (default)				Complete List	Prior Notes
Diagnoses: <input checked="" type="checkbox"/> Auto-calculate BMI code <input type="checkbox"/> Auto-create patient education					
ICD-10 Description	ICD-10	SNOMED Description	Sort	△	Add PL
Click here to add a new diagnosis					
Encounter for routine child health examination w/o abnormal findings	Z00.129	Well child			21



Note: You may select the **Auto-create patient education** checkbox and save this as a preference. If checked all diagnosis codes, in the Assessment window, will automatically create a task for a handout.



Template used: 3 years (default)				Complete List	Prior Notes
Diagnoses: <input checked="" type="checkbox"/> Auto-calculate BMI code <input checked="" type="checkbox"/> Auto-create patient education					
ICD-10 Description	ICD-10	SNOMED Description	Sort	△	Add PL
Click here to add a new diagnosis					
Encounter for routine child health examination w/o abnormal finding	Z00.129	Well child			21

3. The handout will appear in **Plan/Orders** in the task list.

Sending Patient Education: Pat Ed Tab

1. From an open Encounter or Well Visit note, click **Assess/Plan**.
2. Click the **Pat Ed** tab, handouts associated to the template will display in the Picklist section.
3. Click the checkbox under the **Add** column to remove or add any handout displayed.
4. Confirm the Department selected is **Patient**.
5. Click the **Create** button.
6. The handout will appear in **Plan/Orders** in the task list.

Viewing Patient Education on the OP Patient Portal

1. Parent/guardian/patient will log in to the patient portal.
2. Select the child account which handouts were sent from OP.
3. Click **Health Education** on the Navigation Panel.
4. Educational handouts appear in the **Health Education** panel.

Health Education

Search:

Show 5 entries

New	Date Received	Provider	Education	Note
NEW	10/03/2019 12:13 PM	Albert Davis	Handout: MODERATE PERSISTENT ASTHMA	
NEW	10/03/2019 02:10 PM	Albert Davis	Handout: amoxicillin	
NEW	10/03/2019 02:12 PM	Albert Davis	5-6 Year Visit - BF Parent Handout	Bright Futures: Anticipatory Guidance Parent Handout at 5-6 year visit
NEW	10/03/2019 02:14 PM	Albert Davis	Flu (Inactivated) VIS	Influenza Inactivated or Recombinant (Flu) Vaccine Information Statement

Showing 1 to 4 of 4 entries

Previous 1 Next

Tip:

- Additional patient educational materials may be sent to the patient/parent/guardian to access on the OP Patient Portal.
- The handout will be available to the patient/parent/guardian when a visit note is finalized. When completing the task, as described below, the handout will be available to the patient/parent/guardian when the task is complete. **Note:** The task will remain as *Not Started*, on the patient record, if sending when the visit note is finalized. It is the practice responsibility to determine how to handle the tasks that remain Not Started.

Complete the task

- Highlight the task in the list and click the **Do Now** button or double-click to open the handout.
- From **Tasks**, click the drop-down in the **Status** field and select **Completed**.