

# OP Patient Portal (InteliChart) FAQs

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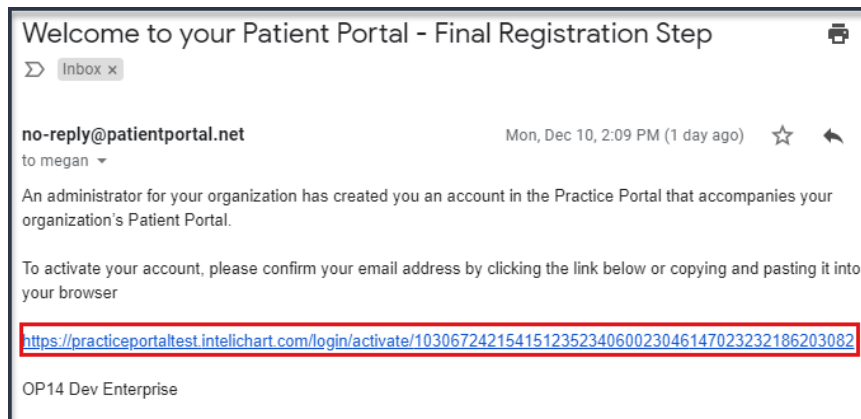
## Why are parents receiving unexpected email notifications?

At this time, while clinical data is being transferred from OP to InteliChart, parents may experience an unexpected number of notifications for items such as medication updates. This setting may be turned off by navigating to the **OP Practice Portal > Portal Management > Patient Interface > Manage Setup** and turning off **Allow Patient Configured Notifications**. **Note:** This will also disable the sending of new appointment notifications.

## How do I activate my OP Practice Portal account?

Follow the instructions below once you have received the welcome email.

1. Click the link in the email to activate your account. The **Activate your account** window is displayed.



2. Enter a password in the **Password** field.
3. Re-enter the **Password** in the **Confirm Password** field.
4. Select a **Security Question** from the drop-down menu and enter the Answer.
5. Click the **Activate Account** button.

You can then log into your account:

1. Click the **Log into Practice Portal** button on the Account activated window.
2. Enter your **user name** and **password**.
3. Click the **Login** button. The Practice Portal Dashboard is displayed.
4. Select a Practice from the drop-down menu (optional, only required to switch to a different practice).

## Does the registration PIN from the InteliChart OP Patient Portal expire?

The pin does not expire.

## How do I indicate that a parent does not want to enroll for the portal?

If a parent feels strongly about not wanting to enroll for the portal, you can do the following:

1. Discuss as a practice team where this should be noted in the patient chart (such as in Misc. Notes), and enter the appropriate note in OP.
2. Navigate to the patient's record in the Practice Portal.
3. Click the **Actions** drop-down menu, and select **Data Sharing**.
4. Select the radio button for **Full Opt Out**. This removes the option to register the patient from the Appointment List in the Dashboard and indicates that the patient has chosen to opt out in their portal record.

If the parent later chooses to enroll for the portal, this setting can be changed by navigating back to Data Sharing in the patient's portal records and selecting the Full Opt In radio button.

## How do I generate a PIN for an additional child or sibling from the Practice Portal?

When registering a patient from the Practice Portal, you can generate a PIN for additional children or siblings. Follow the steps below after sending the PIN for one child. Sending the PIN for one child ensures that the parent receives an email communication with the Patient Portal link as well as the PIN for the first child.

1. Navigate to the patient's portal account by either clicking their name in the Appointment List or by searching for them in Patient Administration.
2. Click the **Register** button (from the Appointment List), or the **Register Patient** link (in the Account Settings section of the patient's portal account). The Patient Registration window opens.
3. Ensure that the radio button to **Register Patient with PIN** is selected.
4. Do not enter an email address.
5. Select the **Do Not Send PIN** radio button.
6. Click the **Print PIN** button or write down the PIN for the parent.

The parent can now log into the OP Patient Portal using their email address and password they established when creating their account for the first child. They can then click **My Account** in the upper right-hand corner of the window and select **Add Child/Dependent**.

## What happens if I change the visibility level of medications to Clinical Staff Only?

Medication refill requests can only be made for medications visible on the Patient Portal. If a medication is set to Clinical Staff Only or higher, it is not available for the parent to see or request a refill. In addition, the client can turn off the Portal Feature for "Allow Med Refill Requests". This will prohibit the link to appear on any Patient Portal account.

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## Do Message Groups populate from Departments in OP?

Message Groups do not populate from Departments in OP. There are standard Message Groups that are configured with every Practice Portal. These groups can be deleted or modified to meet the needs of the practice. Please be aware that Message Groups are attached to Categories. If a client wishes to change the name, they also need to confirm they are changing associating it to the proper category. A Message Group may only have 1 associated category. If a practice chooses more than 1 Category, the messages will not be sent. At this time the only types of messages that can be sent from the Patient Portal are: Messages, Appointment Requests, Medication Refill Requests and Referral Requests.

## How is the Appointment List in the Dashboard populated?

The Appointment List is pulled from the Schedule in OP. The filters at the top of the list can be used to isolate to a specific Provider or Location.

## How are patient requests (appointment, referral, medication refill) configured?

Requests are driven by Message Groups. There are a series of Message Groups created by default. The Practice Admin role group permission has the capability to enable these Message Groups and associate staff members who will handle those requests. Turning the feature ON and OFF (to manage whether the feature is visible to the patient/parent) should be done from the **Portal Management > Patient Interface page**.

## If a provider is not in a Message Group, can they still respond to portal messages from OP?

Yes, nurses or other staff can triage messages from the portal and then forward the message to a provider, if necessary. The provider can then respond to the portal message as long as he/she is listed as a provider in the Practice Portal.

## Where will the photo display if added to a provider's portal setup?

Once self-scheduling is made available, selecting the checkbox to **Show Photo on Patient Portal** will display the provider's photo when a patient self-schedules an appointment with the provider.

## Do Appointment Types in OP populate the Reason for Appointment Mapping page?

All active Appointment Types in OP populate under **Portal Management > Patient Interface > Scheduling**. If a practice adds additional Appointment Types in OP, they will flow into this table on the Practice Portal. If the practice wishes to make a new Appointment Type visible for requesting an appointment, they will need to select the checkboxes for **Generic Calendar, Mobile,** and **Show appt in Patient Portal**.

## Can I generate PINs for multiple sibilnas at the same time from OP?



**Note:** The content below is only applicable to clients who are using OP version 20 or higher and who are using the new OP Patient Portal, powered by IntelliChart.

Yes. Multiple PINs can be generated at the same time for patients who share the same Family Contact by using the **Create/Validate Portal Account** button located in the Family Contacts section of the patient chart and in the Add/Edit Appointment window. For information on the complete workflow, click [here](#).

## How do I remove a duplicate portal account?

If, instead of completing a Merge Match for a self-registration, a PIN is sent to the parent/guardian, a duplicate account will be created in the OP Practice Portal. To remove the duplicate (that does not produce a Merge Match), simply navigate to the account page for the record with the Self-Registered status. Then, in the Account Settings section of the window, click the **Disable** button.

## When adding a provider, what is the difference between Full Access and Practice Only under Data Sharing?

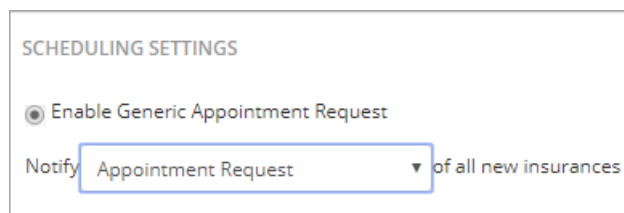
Full Access means that data can be shared among all practices when the Enterprise has multiple practices. Practice Only sets the patient data to be shared with the single practice only.

## What's the best way to generate a PIN for a parent on the phone?

The best way to generate a PIN when a parent is on the phone is to start the PIN generation from the OP Practice Portal. This will generate a Welcome email to the parent. The Easy Button in OP does not generate an email to the parent.

## How do I choose the Message Group that should receive insurance updates?

In some cases, the staff that receives a new appointment request from the OP Patient Portal may differ from the staff that should be notified of a patient's new insurance. To choose the Message Group that should receive the insurance update, navigate to **OP Practice Portal > Portal Management > Patient Interface > Scheduling**. In the Scheduling Settings section of the window, select the appropriate Message group from the drop-down menu.



## When creating a new Role, can I copy another Role or do I have to start

## from scratch?

Roles can be copied so that individual permissions can be added or taken away. To copy a Role, navigate to **OP Practice Portal > User Administration > Roles**. Then, complete the following:

1. Select the Role that will be copied.
2. Click the **Duplicate Role** button located in the upper right-hand corner of the window.
3. Give the new Role a Name and Description in the appropriate fields.
4. Select or deselect the permissions that are applicable to the new Role.
5. Review the members of the new Role.
  - If a member is listed that should not be carried over to the new Role, click the **Remove** button. To remove more than one member at a time, select the checkbox to the left of each member's name, and select **Remove** from the Action drop-down menu.
  - To add a member that is not already listed in the new Role, search for and select them using the **Add User** search field.
6. Click the **Save** button to save the new Role.

## Can I create custom Message Groups?

Yes. Custom Message Groups can be created on the OP Practice Portal by navigating to **User Administration > Message Groups**. Clicking **Add New Message Group** will allow the Administrator to create the new group with the Name, Description, Portal Users, Location and Category. Once created, the message will be driven by the Name, Location and Category assigned.

## Can a parent get access to their child's portal if the patient has reached the Minor Age Limit?

When the Minor Age Limit is reached, once a parent attempts to log in to the patient's record, it will reset and no longer allow the parent to view the patient's record. In order for a parent to have access to the record, the practice would need to give the parent Proxy access. For more information on granting Proxy access, click [here](#).

Patients, that have reached the Minor Age Limit set on the Practice Portal, will need a PIN issued by the practice in order to register and access their own record.

## Can a staff member be given two different Roles?

When 2 different Roles are applied to a user, the portal will apply the Role with the lesser permissions. However, you can apply the Role with the lesser permissions and add additional permissions needed by accessing the permissions in the staff member's account.

## Why can't I edit the Page Templates?

In order to edit System Page Templates, a copy of the template must be made. This will create a Practice version of the template which is editable. After all edits are completed in the Practice template, it should be activated by selecting the **Default** checkbox.

## Why aren't patient portal messages coming into OP?

If a parent selects **On behalf of: Myself** when composing a message, the message will fail. This is due to the lack of patient ID for the parent in OP. They must choose the patient for whom the message applies.

The practice can turn off the option to Allow Self Registered Person to Send Message to avoid having the parent listed in the On behalf of drop-down menu. This option is located in **Portal Management > Patient Interface > Allow Ability to Send Message > Allow Self Registered Person to Send Message**.

## What staff needs to be added to the IntelliChart Practice Portal?

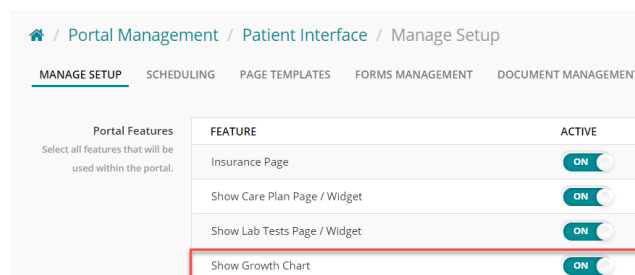
The following practice staff must be added to the OP Practice Portal and be associated to their Practice Portal User account (in the Associated Users section of their account setup):

- Providers with whom appointments are scheduled
- Staff/providers that are responsible for issuing PINs for parents/guardians to register for portal accounts
- Staff/providers that expect to send or directly receive messages or requests from the OP Patient Portal
- Staff/providers that will generate a CDA from OP
- Staff/providers that will send Documents to the OP Patient Portal
- Staff/providers that will create Tasks to be sent to the OP Patient Portal (such as Surveys)

## How do I show growth charts on the Patient Portal?

Below are instruction on how to enable growth charts for parents/guardians/patients to view on the Patient Portal.

1. Navigate to: **Main Navigation Panel > Portal Management > Patient Interface > Manage Setup > Portal Features**.
2. Toggle **Show Growth Chart** to the **ON** position in the Active column.



## Can I merge duplicate portal accounts?

You cannot merge duplicate accounts. You need to keep one and disable the other one. To disable one of the accounts, navigate to the account and click the **Disable** link in the **Account Settings** section.

ACCOUNT SETTINGS	
Status	Registered <a href="#">Disable</a>
PIN/VQ	Pin Already Assigned <a href="#">Generate PIN</a>
Login email	(No Registered Email)
Password	
Registered on	9/16/2019
App-specific Access i	<a href="#">Generate Passcode</a>

## Why don't patients appear on the OP Patient Portal?

A patient's status (set in the Demographics of the patient chart) determines whether or not the patient will appear in IntelliChart to be registered for the OP Patient Portal. Below is a list of the patient statuses that are sent to IntelliChart. If a patient is not displayed in IntelliChart due to their patient status, the status may be updated to one listed below.

- Active
- In Collection
- Employees
- All practice created Patient Statuses

Patients with one of the following statuses are **excluded** from being sent to IntelliChart:

- Inactive
- Transferred
- Discharged
- Diseased
- Call Coverage
- Visitor
- Waiting List
- Merged

## How do I correct a portal account when a parent entered the patient's info instead of their own?

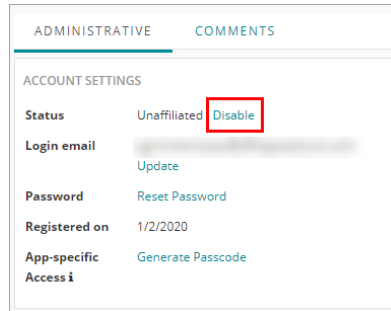
If a parent accidentally registers their child as the parent account, as well as the child account, the below steps should be taken by the practice to fix the account. Once the steps to disable the account are completed, the practice can proceed with generating a new PIN from within IntelliChart.



**Warning:** The process of correcting the account results in the parent not being able to use the same e-mail address that was used when the initial account was created. If a parent truly needs to use the previously used email, **OP Support must be contacted** so that a ticket can be logged with IntelliChart to completely remove the email from the database.

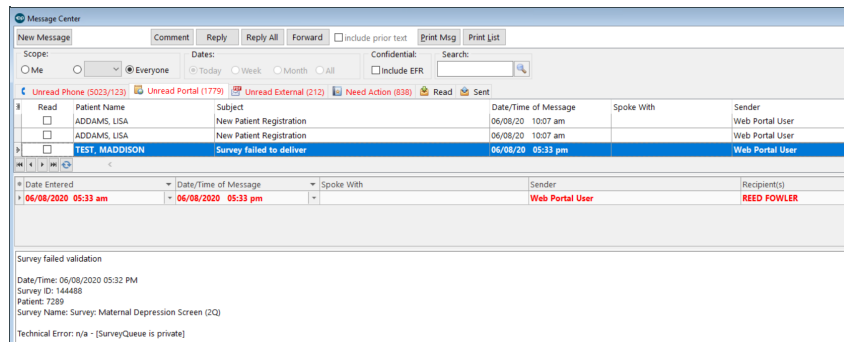
1. Remove any children associated with the account. Click [here](#) for detailed steps on how to do this. The removal of associated children must be completed before completing the next step.
2. Disable the parent account:

- Navigate to Patient Administration in the Practice Portal: **Navigation Panel > Patient Administration**.
- Click the **Account** button.
- Search for the parent by entering their last name, first name, and date of birth in the respective fields and selecting a Search option from the drop-down menu.
- When the parent name is displayed (identified by the Parent/Guardian flag), click the **Select** button in the Actions column.
- Navigate to the **Account Settings** section and click **Disable**.



## Will a survey be sent to the Patient Portal with a Visibility higher than Any Staff Member?

A survey that has a visibility level of Clinical Staff only or higher does not get sent to the Patient Portal. A message in the **Unread Portal** tab will alert the staff that the survey failed to deliver.



If appropriate to do so, navigate to the Survey and update the Visibility Level to Any Staff Member: **Clinical tab > More button (Customize group) > Surveys**.

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## Will a parent be informed when a survey is deleted?

When a survey task is deleted in OP, the survey is not removed from the Patient Portal. When a parent clicks the Patient Survey link within the message, they will receive the following message:





**This survey is no longer available**  
If you need help, please reply to the portal message for further assistance.

## What Documents can be sent to the Patient Portal?

From OP, you may send Documents to the Patient Portal for the parent/guardian/patient to view. When sending a Document to the Patient Portal, you will select the **Share to Portal** checkbox and if necessary, enter an **expiration date**.

 Share to portal Portal Exp Date: 

Documents shared to the Patient Portal may not be immediately available and can take up to 30 minutes to be displayed in the portal and for a message to be received by the parent.

Below is a list of the areas, within OP, you may select and send a Document.

- Document Management
- Medical Records
- School / Camp Reports (Standard and End User)
- Diagnostic Test Requisition Form
- Asthma Action Plan
- General Letter
- Patient Statement




**Important:** Imported Documents can be shared to the portal from Document Management. In order for these Documents to successfully make it to the portal, the **File Extension** and **File Type** fields must be populated. These fields automatically populate when importing a PDF but must be manually populated when working with a JPG, TIF etc.

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## Where can I see the status of a patient's portal account?


A patient's Portal Account status can be viewed in various areas within OP. The field may display a status of Inactive, Active, or Unknown.

- Basic Information section of the Patient Chart. To view an updated status after completing portal registration, use the **Refresh** button located next to the Portal Acct: indicator to pull in real-time information.

Status: Active as of: 5/16/2000  
 Register date: 05/16/2000  
 Last visit: 01/05/2021  
 Last update: 01/11/2021 12:31 PM by: 2035  
 Portal Acct: Inactive 

- Tracking window. If the patient has a scheduled appointment, the **Portal Account** column can be referenced to confirm the patient's portal account status.

Time	Patient	Reason	TOV	Arrival	Visit Status	Min.	Portal Account
Staff : REED FOWLER (COUNT=2)							
04:00 PM	ANDERTON, MARY " Fever		EST SICK VISIT	05:16 PM	Waiting Room		Inactive
04:30 PM	CHAN, JACKIE Fever		EST WELL CHK	05:21 PM	Waiting Room		Active

- Add/Edit Appointment window. When scheduling or editing a patient appointment, the Portal Account field can be referenced to view a patient's portal account status. You may click the **Create/Validate Portal Account** button  to begin the IntelliChart registration.

Last encounter: 12/07/2020  
 Last well visit: 07/13/2021  
 Language(s): ENGLISH  
 PCP: Albert Davis  
 Portal Account: Inactive 

## How do I change privacy on a document already shared to the portal?

In order for a document to be shared to the OP Patient Portal, the privacy level (or visibility) must be set to Any Staff Member. If the document must no longer be shared, the Shared to Portal checkbox must be deselected prior to changing the privacy level of the document.

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## Can Bulk Statements be sent to the portal?

Bulk Statements, meaning statements for a mix of different patients, cannot be sent to the portal. However, statements for multiple dates of service can be sent to the portal for an individual patient by selecting the appropriate transactions that should be included on the statement in the Statements section of the patient chart. To review the steps for this process, click [here](#).

## Can a parent print their child's vaccine record from the portal?

Yes. Immunization records can be printed from the portal. They do not have to be requested or manually sent, but rather are considered clinical data and are automatically pushed to the portal. The parent will take these steps to access and print their child's vaccine record:

- Log into the portal and select the **patient's toggle** button.
- In the Navigation Panel, expand **My Chart** and select **Immunizations**.
- In the Immunizations section of the window, click the **Print** button.

4. In the print window, click **Print This Page**.

## Why are Documents not flowing to the portal?

There are a number of reasons why a Document that was shared to the portal does not actually flow to the portal. Listed below are reasons a Document doesn't flow to the portal, and where you can review the necessary information.

- Verify in the Staff/Provider Directory that the user who sent the Document to the portal has a Practice Portal user account. This includes confirming in the Practice Portal that this user's portal account lists them as the Associated user.
- Verify in the patient's Basic Information that the patient for whom the Document was sent has an active portal account.



**Tip:** If either of the above reasons are why a Document didn't flow to the portal, the user who initiated the Document sharing will receive a failure message in the Unread Portal tab of the Message Center with a subject of **Document failed to deliver**.

- Verify that the Document that was shared has a Visibility of Any Staff Member
- Verify that the Shared to Portal checkbox is selected for the Document
- Verify that the Document (if shared via Document Management) has an Item Type and Category
- Verify that the Document (if imported into/shared via Document Management) has a File Type and File Extension



**Important:** The File Type and File Extension will automatically populate when importing a PDF, JPG, TIF, etc.

## How do parents add a PIN from another practice?

Once a parent has been issued a PIN from another practice utilizing the IntelliChart Patient Portal, they can easily link the practice to their existing portal account by following these steps:

1. Log into their Patient Portal account.
2. Navigate to the account page for the patient who has been issued a PIN from another practice.
3. Click **My Account**, and select **Add PIN from Another Practice**.
4. Enter the **PIN** and **Date of Birth** for that patient.
5. Click **Add PIN**.

## I am ready to go live with the IntelliChart Patient Portal, what do I do?

Once you are ready to go live with the IntelliChart Patient Portal, submit a request to [implementation@officepracticum.com](mailto:implementation@officepracticum.com) and include the requested date of go live. We highly recommend that all your staff and providers have logged into the IntelliChart Patient Portal and have familiarized themselves with the new portal. Many of our practices are doing an announcement of the new portal either by sending a PMX message, putting it on their website or social media pages. This will inform your parents so they may be prepared to register. If you are interested in the Bulk Pin solution, please read about it [here](#).

## How do I get an Associated User to show on the Practice Portal?

If a user is not found in an Associated User list, try the following steps:

- If the Associated User is a clinical staff member, check the **Providers** section: **Navigation Panel > User Administration > Providers**. Locate the Associated User in the list, and follow the **instruction** on Adding Clinical Staff to the Practice Portal.
- If the Associated User does not show under Staff Members or Providers, edit a piece of user information in the

Staff/Provider directory in OP and save. It may be necessary to check back in 15-30 minutes to see if the changes triggered an update for the user in the Practice Portal.

- If your practice has multiple locations, click the Locations drop-down and choose another location. Check for the staff member or provider in each of the locations.

## How do I issue PINs for blended families?

Each parent will have their own login using their own email and password. The practice will provide each parent PINs for the children that are theirs. This will allow the parent to view only patient information, on the Patient Portal, for their children.

## Will parents receive Appointment reminders and messages, for the same child(ren), when each has their own Patient Portal account?

If two parents create their own patient portal account, for the same child(ren), each parent will receive appointment reminders and messages from the Patient Portal. This includes text or phone calls to their own phone numbers or emails to their email address. The method of notification would be setup by each parent in the Manage my account section of the Patient Portal.

## What do the task statuses mean?

- Not Started
  - Internal OP Task: Task is not started by practice staff
  - External Portal Task: Task is not started by user on the patient portal
- Completed
  - Internal OP Task: Task is has been completed by practice staff
  - External Portal Task: Task has been completed by user on the patient portal
- Deferred
  - Task has been postponed to a later date
- On Hold
  - Task has been placed on hold
- In Progress
  - Internal OP Task: Task is in progress when the practice staff begins the task
  - External Portal Task: Task is in progress when the portal user begins the task (Ex: Starting a survey tasked to the portal)
- Ongoing
  - Task that continues to occur
- Canceled
  - Task that will no longer take place
- Queued
  - External Portal Task: Delivered to the portal (Ex: Survey delivered to portal)
- n/a
  - Not available

## Can forms be created in IntelliChart patient portal and integrated with OP?

OP is not integrated to support Forms found on the IntelliChart portal. OP has implemented a Billing Consent Form that is used with the [Bill Pay](#) feature. This form is the only supported form found in the IntelliChart portal.

## Are patient accounts disabled on the Patient Portal when their status is updated to Transferred in OP?

When the patient status is changed to Transferred in OP, it does **not** automatically disable the patient's portal account. The Practice will need to log into the Practice Portal and disable the account.

ACCOUNT SETTINGS	
<b>Status</b>	Registered <a href="#">Disable</a>
<b>PIN/VQ</b>	Pin Already Assigned <a href="#">Generate PIN</a>
<b>Login email</b>	(No Registered Email)
<b>Password</b>	
<b>Registered on</b>	9/2/2021
<b>App-specific Access i</b>	<a href="#">Generate Passcode</a>