

OP Patient Portal: Managing Appointment, Cancellation, and Reschedule Requests

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About

All requests to schedule, cancel, or reschedule an appointment sent from the OP Patient Portal to OP are received by all users who have been assigned to the **IC-Appointment Request** department in the OP Staff Directory and are displayed in the **Unread Portal** tab of the Message Center. Allowing these requests is optional, and must be enabled in the Practice Portal.

Note: Practices are encouraged to use the **IC-Appointment Request** department for Appointment Request management. If there are no users assigned to the **IC-Appointment Request** department in OP, Appointment Requests will be handled as follows:



- **Appointment Requested with Specific Provider:** If an appointment is requested with a specific provider, the provider with whom the appointment is being requested receives the Appointment Request message in the Unread Portal tab of the Message Center.
- **Appointment Requested with Any Available Provider:** The OP Administrator login (\$AD) receives the Appointment Request message in the Unread Portal tab of the Message Center.

Because there is only one department that receives these messages, practices must consider the workflow that works best for them. In practices where there are several locations, and each location has a dedicated scheduling team, the practice may decide to create additional departments to which they will forward the location-specific message. Alternatively, the staff assigned to receive the requests can simply preview the message in the Message Center, and bypass the ones that are not relevant to their specific location.

Once a request has been handled by a staff member, it is important to remember to respond to the request message so that the parent is aware that their request was completed.

Assign Staff to Appointment Request Department

For information on how to assign a staff member to a Department, click [here](#).

Complete and Respond to a Request to Schedule, Cancel or Reschedule an Appointment

1. Navigate to the **Unread Portal** tab of the Message Center.
2. Select and review the **request message**. The contents of the message are displayed in the lower section of the Message Center window (as with all messages in OP).



Note: If handling a request to schedule or reschedule an appointment, and the **Requested Appointment Slots** are not displayed in the message, then the patient/parent indicated they would like the next available appointment. If preferred times were provided at the time the request was sent, they would be displayed in the body of the message.

3. Navigate to the practice schedule and schedule, cancel, or reschedule the appointment, depending on the nature of the message, as you normally would.
4. Return to the Message Center window, and with the message selected, click the **Reply** button.

5. Enter your **Response** to the message in the Response field, or click the Phrase Construction button to add a pre-typed phrase.
 6. Below the Response field, select the **Completed: remove from all inboxes** radio button to ensure the message is no longer displayed as unread in the inbox of other users.
 7. Click the **Send** button. Your response is sent to the patient/parent.
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