Intelichart Practice Portal: Customize Page Templates

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The content in this article is relevant to the InteliChart Patient Portal.

For documentation on the OP Portal, please**click here**.

About

The Intelichart Practice Portal is delivered with a collection of Page Templates that are used to communicate with parents/guardians via email, text, or on-screen in the Patient Portal. Each Page Template starts out as a System Template but can be copied to a Practice Template where the verbiage can be customized to meet the Practice's needs. All System Templates are available in English and Spanish. When a Practice creates its own Practice Template in English, the Spanish translation must be entered manually for the template. For a list of Page Templates available in the Intelichart Practice Portal, click **here**.

Review System Templates

1. In the Intelichart Practice Portal, navigate to the Page Templates:**Navigation Panel > Portal Management > Patient Interface > Page Templates**.
2. Click to expand the folder and sub-folder(s) (if applicable) that houses the template that needs to be customized. If you do not know where a template is filed, search for the template in the **Search** field.
3. Click the **System Templates** folder.
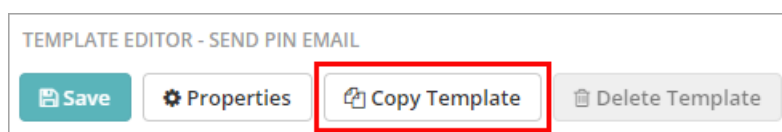4. Click the **template link**.
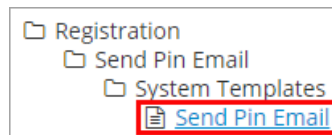
5. Review the content of the template.

If customization is needed, continue to step 5 in the*Customize Page Templates* section below.

Customize Page Templates

The workflow below describes the steps to take if you are creating a Practice Template for the first time.

1. In the Intelichart Practice Portal, navigate to the Page Templates:**Navigation Panel > Portal Management > Patient Interface > Page Templates**.
2. Click to expand the folder and sub-folder (if applicable) that houses the template that needs to be customized.
3. Click the System Templates folder.
4. Click the template link. The Template Editor window is displayed.
5. Click the **Copy Template** button. The Copy Template window is displayed.

6. Enter a **Name** and **Description** for the Practice Template.

7. If the template being created will be the practice default, select the **Practice Default** checkbox.
8. Click the **Create New Template** button.
9. Edit the template by clicking directly into the text box and adding or deleting text.

> **Note**: Text displayed in double brackets {{ }} represents token text. The tokens available for the specific Page Template can be found in the **Insert Token** drop-down list located above the message formatting toolbar. The list of available tokens vary by page template.
>
> Insert Token ▾

10. Click the **Save** button to save your template. The new template is added to a Practice Template folder located in the same category as the System Template and is indicated as the default with a star icon. If further edits are needed, navigate to the Practice Templates sub-folder within the category and click the template link. Be sure to save all changes by clicking the **Save** button.

Insert a Resource or Quick Reference Guide (QRG) Link in a Page Template

Parent-facing QRGs for the Intelichart Portal can be linked to in Page Templates. The following articles contain QRGs that practices may want to share with their parents/patients to guide them through their portal registration and navigation:

- OP Patient Portal Parent Experience: Complete Registration With a PIN QRG
- OP Patient Portal Parent Experience: New Patient Registration (Without a PIN) QRG

Follow the steps below to link to a QRG:

1. Navigate to one of the QRG articles listed above.
2. Click the **Click here** link located above the embedded QRG to access a link to the specific QRG PDF. A full window displaying the PDF is opened.
3. Highlight and copy the link from the web-browser URL field. The PDF links begins with **dyzz... Do not copy the link to the help article itself.**

🔒 dyzz9obi78pm5.cloudfront.net/app/image/id/5e2efa098e121c6574318b3e/n/3510--op-patient-portal-parent-experience--portal-navigation-qrg.pdf

4. In the Intelichart Practice Portal, navigate to and select the Practice template in which you want to add a link to a QRG.
5. In the template editor window, highlight the text to which you want to add the resource hyperlink.
6. Click the Insert/Edit Link button. The Insert Link window is displayed.
7. Paste the copied PDF URL into the URL field.
8. Click the **OK** button.
9. Click the **Save** button to save your changes.

> 💡 **Tip:** Steps 5-9 may also be followed to link to another URL such as a practice website.

Insert an Image in a New Page Template

1. In the Intelichart Practice Portal, navigate to the Page Templates: **Navigation Panel > Portal Management > Patient Interface > Page Templates**.
2. Click to expand the folder and sub-folder (if applicable) that houses the template that needs to be customized.
3. Click the **System Templates** folder.
4. Click the **template link**. The Template Editor window is displayed.
5. Click the **Copy Template** button. The Copy Template window is displayed.
6. Enter a **Name** and **Description** for the Practice Template.
7. If the template being created will be the practice default, select the **Practice Default** checkbox.

8. Click the **Create New Template** button.
9. To insert an image:

    a. Click into the template where the image should be inserted, click the **Insert/Edit Image** button ![image icon] .
    b. The Insert/edit image window displays, complete the below information.

    - **Source**: Click into the field and paste the URL for the image you wish to use.
    - **Description**: Click into the field and enter a description of the image
    - **Dimensions**: The dimensions will automatically populate from the URL in the Source field
    - **Constraint Proportions**: Leave this checkbox selected.

10. Make addition changes to the template by clicking directly into the text box and adding or deleting text.
11. Click the **Save** button.