

# System Preferences: Portal

Last Modified on 11/09/2021 8:33 am EST

Version 20.13

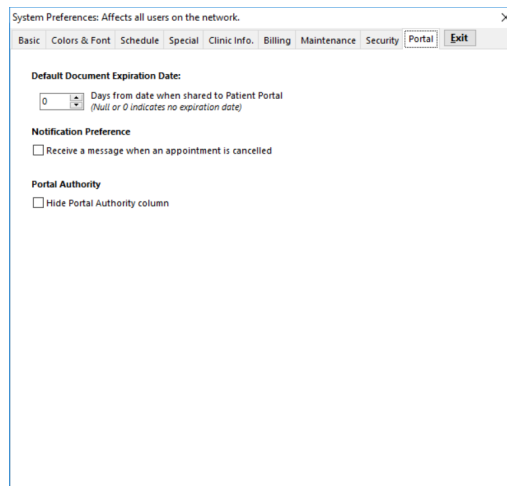
**Path: Admin tab > Global Preferences button > Portal tab**



**User Permission:** The System Preferences window is only available to users with permission: **AA\_SystemAdmin\_mi**.

## About

The Portal tab of the System Preferences window contains default values specific to functionality with the IntelliChart products, OP Patient Portal, and OP Notify.



- **Default Document Expiration Date:** Select the number of days a document shared to the portal will be visible to the patient/parent. A zero in this field indicates that there is no expiration date defaulted, and the user will have the opportunity at the individual Document-level to set a specific expiration date.
- **Notification Preference (OP Notify):** Select this checkbox if you want users assigned to the **IC Appointment Request** Department to receive a message in the OP Message Center when an appointment is cancelled via OP Notify. Click [here](#) to learn how to assign staff to Departments in OP.



**Tip:** Setting this preference is recommended so that practice staff is aware of appointment cancellations made by the parent/guardian via OP Notify.

- **Portal Authority:** Select this checkbox to hide the Portal column located in the Family Contacts sections of the Patient Chart. This field was previously used to grant parents/guardians access to the portal. However, in relation to the IntelliChart Patient Portal, this is a **reference-only field and has no functionality for giving access to the IntelliChart Patient Portal**.

Version 20.12

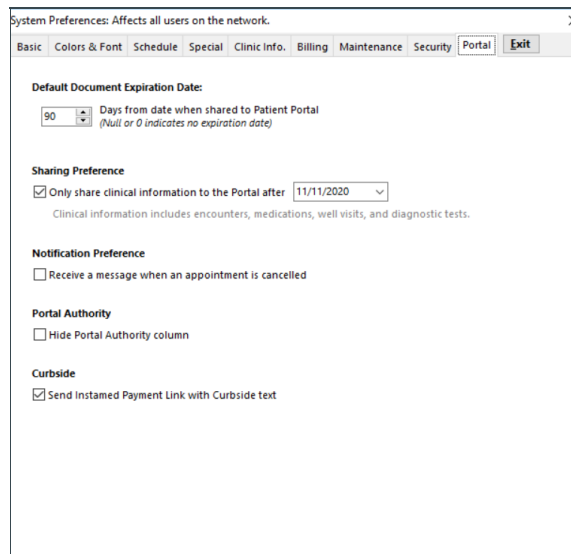
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## Overview

The Portal tab of the System Preferences window contains default values specific to functionality with the IntelliChart products (OP Patient Portal and OP Notify) and with OP's Curbside feature.



- **Default Document Expiration Date:** Select the number of days a document shared to the portal will be visible to the patient/parent. A zero in this field indicates that there is no expiration date defaulted, and the user will have the opportunity at the individual Document level to set a specific expiration date.



**Tip:** Providers may want to set specific type of Documents, done at the individual Document level, to expire within a certain time-frame to remind patients that they are due or overdue for a well-visit or other type of office visit.

- **Sharing Preference (IntelliChart Patient Portal):** Select this checkbox and enter the date after which clinical data (Encounters, Medications, Well Visits, and Diagnostic Tests) will be shared to the Patient Portal.



**Warning:** This preference only applies to newly established Patient Portal accounts. It is not used to remove clinical data that has already been sent to the portal.

- **Notification Preference (OP Notify):** Select this checkbox if you want users assigned to the **IC Appointment Request** Department to receive a message in the OP Message Center when an appointment is cancelled via OP Notify. Click [here](#) to learn how to assign staff to Departments in OP.



**Tip:** Setting this preference is recommended so that practice staff is aware of appointment cancellations made by the parent/guardian via OP Notify.

- **Portal Authority:** Select this checkbox to hide the Portal column located in the Family Contacts sections of the Patient Chart. This field was previously used to grant parents/guardians access to the portal. However, in relation to the IntelliChart Patient Portal, this is a **reference only field and has no functionality for giving access to the IntelliChart Patient Portal.**
- **Curbside:** Select this checkbox to send the Instamed payment link in the text message when using Curbside. **This checkbox is valid only for clients using Instamed Merchant Services.**