> **Important Content Update Message**
> We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**.

OP Patient Portal Requirements and Recommendations

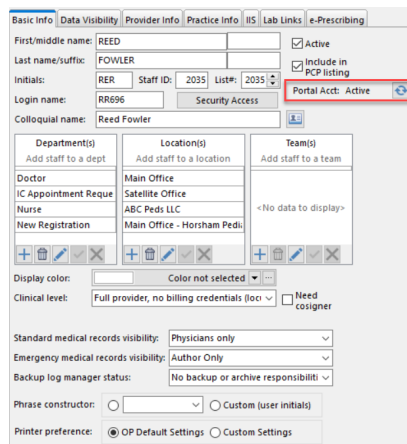Last Modified on 07/30/2020 10:53 am EDT

Version 20.4

Overview

In order to send documents and surveys to the Patient Portal there are requirements that need to be met. Below you will find information related to those requirements and additional recommendations.

Requirements for Sending Documents to the Patient Portal

Below you will find the required setup to send documents to the Patient Portal.

- The user sending the documents to the Patient Portal must have an active staff/provider account on the Practice Portal. To confirm a user has an active account on the Practice Portal:
    - Navigate to: **Practice Management tab > Staff/Providers**.
    - Highlight the staff and confirm the *Portal Acct:* field is set to **Active**.

- The patient account receiving the document must be registered. To confirm a patient is registered on the Patient Portal:
    - Navigate to: **Clinical, Practice Management or Billing tab > Patient Chart**
    - Search for and select a patient.
    - Navigate to Basic Information and confirm the *Portal Acct:* is set to **Active**.

Requirements for Sending Internal and CHADIS Surveys to the Patient Portal

Internal and CHADIS Surveys

Below you will find the required setup, for both internal and CHADIS surveys, to be sent to the Patient Portal.

- The user sending the survey to the Patient Portal must have an active staff/provider account on the Practice Portal. To confirm a user has an active account on the Practice Portal:
  - Navigate to: **Practice Management tab > Staff/Providers**.
  - Highlight the staff and confirm the *Portal Acct:* field is set to **Active**.
- The patient account receiving the survey must be registered. To confirm a patient is registered on the Patient Portal:
  - Navigate to: **Clinical, Practice Management or Billing tab > Patient Chart**
  - Search for and select a patient.
  - Navigate to Basic Information and confirm the *Portal Acct:* is set to **Active**.

CHADIS Only Surveys

Below you will find the required setup for CHADIS surveys only.

- The practice must have an active subscription to CHADIS.
- Email for each staff member entered in the Address Book.
  - The email entered must correspond to the email CHADIS has on file for the staff member.
  - Email addresses can not be shared with staff, each staff member must have a unique email with CHADIS.
- CHADIS will setup up permissions for each staff member.
- Login information will be sent to each staff member by CHADIS. Each staff member must complete the CHADIS login.

Considerations for Implementing Documents and Surveys

The sending of documents and surveys relies on parents registering their child(ren). It is recommended the practice considers a delay, of several weeks to a month, before sending documents and surveys to the Patient Portal. By delaying, the practice can form a plan on how to advertise the Patient Portal to parents. Your practice may want to consider the Schedule as the guide and parents to target registration.

- Complete the staff setup in the Practice Portal. Each staff member must complete their staff registration from the Complete Registration email.
- Encourage parents to complete the Patient Portal registration for each child.
  - Have the front desk staff, upon check-in, confirm the child has an active portal account.

- If the parent has not completed registration, have practice staff assist with getting the patient(s) registered.
  - Have the QR codes available for parents to download the InteliChart app to complete registration.
- Survey recommendations:
  - Do not change surveys to the Patient Department, in the Template Editor, until prepared to begin sending to the Patient Portal.
  - If surveys are currently set to the Patient Department, in the Template Editor, the practice will need to check for failed survey messages.
  - Have a staff member assigned to monitor messages for failed surveys. You may search for these messages in the Unread Portal tab of the Message Center. These surveys would need to be completed in the office.
  - For surveys that failed, staff may assist the parent with registering the child(ren) on the Patient Portal. Once registered the practice staff may delete the original task and resend the survey. The parent can complete from the Patient Portal.