Checklist: Add a New Provider to an Existing OP Practice

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Overview

The following article contains information to help prepare your Practice to onboard a new Provider and set up the user in OP. Your Practice will partner with an OP Account Manager during the new Provider onboarding. Steps that will be completed by your Practice before and after a license is applied by OP, for the new Provider can be found below. Please contact OP **several weeks** in advance to your new Provider starting to ensure there is adequate time for both the Practice and OP to onboard the Provider successfully.

Items to consider

Prior to contacting OP, start the process to credential your new Provider with all appropriate insurance payers. It is important to note that credentialing can potentially take several months for some payers. Additionally, make note of any technology that you may need to support your new Provider. Will you need to purchase additional computers, monitors, or other equipment?

Gather the following information

- Provider's full name
- Credentials (Example: MD, DO, NP)
- Replacement provider or additional provider?
  - If replacement, who is leaving and when?
- Start date with practice
- Physical copy of the medical license
- Physical copy of DEA (if applicable)
- Visits per month (< 75, >75-200, >200)
- Will the provider need access to any of these features?
  - E-prescribing
    - Location(s) your provider will be prescribing from
  - Electronic Prescribing of Controlled Substances (EPCS)
    - Location(s) your provider will be prescribing from
  - Direct Messaging
  - Ordering and/or results from outside lab(s)
  - CQM Solutions (MU)
  - OP Patient Portal
  - OP Notify
  - OP Mobile
  - CHADIS
  - Anytime Pediatrics (Telehealth)
- Will the new provider need training?

Make a copy of the e-prescribing **form** and complete it with the new Provider's information. Submit a completed copy of the form, answers to the list above, and the physical copies of your new Provider's medical license and DEA to your Account Manager. If you do not have your Account Manager's contact information readily available, you can email **solutions@officepracticum.com**. Your Account Manager may reach out to you if additional information is needed. You will receive a DocuSign to complete for the new Provider license.

Note: If you prefer to fax the physical copies of the medical license and DEA, please use the Account Manager fax line: 888-450-0717

What Next?

Stage 1: Add New Provider to OP

- You can begin by adding your provider's basic information to OP so that you can add your provider to the schedule. Click the **Stage 1** "**+**" sign to expand the tab for more details.

Stage 2: After OP Adds a Provider License

- You will receive an email from OP that a license has been applied to your provider. At this point, you can complete information for your provider in OP. There may be specific services that you need to complete identity proofing for. Click the **Stage 2** "**+**" sign to expand the tab for more details.

Other: Cloud Users, Anytime Pediatrics, CHADIS, OP Mobile, OP Notify, OP Patient Portal

- This section provides the steps to ensure your provider is set up with credentials to connect to OP Cloud. It also discusses the steps to ensure your provider is setup to use Anytime Pediatrics, CHADIS, OP Mobile, OP Notify, and/or OP Patient Portal if applicable to your practice. Click the **Other** "**+**" sign to expand the tab for more details.

Training

- This section provides training resources for your new provider. Click the **Training** "**+**" sign to expand the tab for more details.

Stage 1: Add New Provider to OP

Action to Take	Implication
Practice Management > Staff/Providers. Check to see if the provider has already been added for you by OP into the staff provider directory. If not, **add your provider to the staff directory** and only complete **Basic Information** for the provider.	By adding the user to the staff provider directory, you will be able to add your provider to OP as a new staff member and set up permissions and login information.
Add Staff/Resources to a Calendar View	By adding the user to the Schedule Properties for Highlighted Calendar window, your practice will be able to see the provider on your practice calendar.

Stage 2: After OP Adds a Provider License

Action to Take	Implication
Complete **setting up the provider in the staff directory**.	This will ensure accurate information for billing submission, lab links and e-prescribing.
Add provider to the appropriate **permission groups**.	Membership groups determine what areas of OP are accessible to a specific user.
Link a signature to the provider.	This allows for a provider signature to be printed on certain forms.

Connect provider(s) to insurance payers.	All credentialed providers *must* be associated with the payer in order to generate a claim for that particular provider and payer combination.
EPCS Users: Your new provider will receive an identity proofing (IDP) email from Dr. First. Have the provider complete the **identity proofing steps**. After your provider has completed Step 7 of the IDP process, each provider must be activated for EPCS in the **Logical Access Control** (LAC) dashboard from within the OP application.	The IDP process verifies identities using a combination of personal identity verification, knowledge-based authentication, and verification of account information. The LAC is used to configure providers, who have completed the IDP process in OP, as either active or inactive. This is a two-step process which requires a user with System Administrator permission. Once a provider is activated, they will be able to use EPCS.
Direct Messaging Users: Complete the **onboarding process.** A representative from the practice will receive an organizational application that identifies them and the practice.	EMR Direct, the partner that we have chosen for this process, will verify the identity of the practice and the individual who signs the organizational application. This process of Identity Proofing may be completed through a notarized form or remotely via an emailed link.

Other: Cloud Users, Anytime Pediatrics, CHADIS, OP Mobile, OP Notify, OP Patient Portal

Action to Take	Implication
Cloud Users: Contact **OP Support** for Parallels Username and Password. **Install OP Cloud** on the new workstation.	The username and password provided by OP allows for the Parallel Client on the workstation to connect to OP Cloud.
Anytime Pediatrics Users: Contact Anytime Pediatrics to register new user and obtain valid user name. **Add the new Anytime Pediatrics user**.	OP requires the user name from Anytime to add the new staff member as an Anytime Pediatrics user.
CHADIS Users: Contact CHADIS for your new provider user email. **Add the email to the address book in OP**.	CHADIS uses the email address in your Address Book to identify you as an ordering Provider or staff member.
OP Mobile Users: Enroll the new provider as a user. A welcome email will be sent to the provider and they will need to verify their account.	Enrolling a user in OP mobile allows the user to utilize the OP Mobile platform. The user will be required to complete the enrollment process to have access to OP Mobile.
OP Notify Users: Add a Provider to OP Notify.	All users requiring appointment reminders to be sent using OP Notify will be created as Providers by the Practice Administrator.
OP Patient Portal Users: Add a Provider to the OP Practice Portal.	Staff need to be added to the Practice Portal if they are: • 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)

Note: If you are utilizing the OP Patient Portal for a child of your own, it's important to note that the email used for the portal account for your child must be unique from the email address(es) used for the adding of a user to the OP Practice

Portal, OP Notify or CHADIS.

Training

Options / Actions to Take	Description
eLearning: If you have an **eLearning Enrollment Key**, enroll the new provider in eLearning. If you do not have an eLearning Enrollment Key and you're interested in learning about eLearning options, complete this **Training Request Form**.	The OP Learning Center offers self-paced interactive sessions accessible at any time, as long as you have internet access. Learning plans are available for every office role: Front Desk, Nurse, Provider and Biller. These sessions include assessments which allow you to easily track your staff's progress.
Online Training: Contact your Account Manager to determine if you have valid training hours on your contract for Private Instructor-Led Training or complete this **Training Request Form.**	Partner with one of OP's expert Training Specialists to learn the ins and outs of OP, in the topic of your choice. These sessions, available for purchase, are available between 8AM-6PM EST Monday-Friday. Evening and weekend sessions are available at an additional cost.
Live Group Webinars: Click **here** to register your staff.	OP's group training webinars are free, role and topic-based sessions that provide OP users a forum to ask questions, discuss best practices, and clarify workflows with users from different practices. While these sessions are geared toward new OP users, they are also a perfect opportunity for not-so-new users to learn different ways to expand their usage of OP!
Onsite Training: Contact your Account Manager to discuss options and pricing or complete this **Training Request Form.**	Schedule in-person training right at your practice location. To assist with office workflows and best practices, our expert trainers will travel directly to your office and train your staff onsite.
Custom Training Package: Contact your Account Manager to discuss options and pricing or complete this **Training Request Form.**	Design a comprehensive approach tailored to the specific needs of your practice. Unsure where to start? Have a lot of new staff or providers? We are here to help! We can design a training package to suit your needs.