Checklist: Add a Resident to an Existing OP Practice

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Overview

Congratulations! It's great that your practice has elected to help mentor and train the next generation of pediatricians. This article was created to help you make sure your resident can effectively utilize Office Practicum while in your office. Your practice will partner with an OP Account Manager during the resident onboarding. Steps that will be completed by your practice before and after a license is applied by OP, for the new resident can be found below. Please contact OP **several weeks** in advance to your resident starting to ensure there is adequate time for both the practice and OP to onboard the resident successfully.

> **Note**: If you are adding a medical student to your staff, most practices add them as clinical staff and give them the same permissions as nurses/medical assistants since they are not yet licensed physicians.

Items to consider

Prior to contacting OP, make note of the following:

- Will you need to purchase additional computers, monitors, or other office equipment?
- Will the resident be documenting in the EHR or just viewing?
- Will they have their own schedule of patients or be seeing patients on another provider's schedule?
- What kind of permissions do you want them to have in OP?
- How will the resident's work affect your practice's productivity metrics and other reports that depend on how work is assigned in OP?
- For billing, does your site and supervision potentially qualify you for the Primary Care Exception?

Some of these questions can be answered in your OP setup but some will need to be part of your orientation process. Your billing staff will need to be involved to make sure that appropriate information is flowing through to the claim. If you use OP's RCM services, it is important to have this conversation with the OP RCM team.

Gather the following information

- Resident's full name
- Credentials (Example: MD, DO, NP)
- Replacement resident or additional resident?
  - If replacement, who is leaving and when?
  - If you have rotating residents, the license can be transferred from one to the next
- Start Date with practice
- Physical copy of medical license
- Will the resident need access to any of these features?
  - E-prescribing
    - Location(s) your resident will be prescribing from
  - Direct Messaging
- Will the resident need training?

Make a copy of the e-prescribing **form** and complete it with the new resident's information.Submit a completed copy of the form, answers to the list above, and a physical copy of your new resident's medical license 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 resident license.

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

What Next?

Stage 1: Add New Resident to OP

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

Stage 2: After OP Adds a Resident License

- You will receive an email from OP that a license has been applied to your resident. At this point, you can complete information for the resident 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

- This section provides the steps to ensure your resident is set up with credentials to connect to OP Cloud. Click the **Other "+"** sign to expand the tab for more details.

Training

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

Stage 1: Add New Resident to OP

Action to Take	Implication
Practice Management > Staff/Providers. Check to see if the resident has already been added for you by OP into the staff provider directory. If not, **add your resident to the staff directory** and only complete the **Basic Information** tab.	By adding the user to the staff provider directory, you will be able to add your resident 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 resident on your practice calendar.

Stage 2: After OP Adds a Resident License

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

Link a signature to the resident	forms.
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

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.

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.