

# InteliChart Portal Tips & Tricks


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OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.



## PORTAL TIPS & TRICKS

Below is a collection of the Tips & Tricks that are featured in the weekly OP Portal Update email, provided by Dr. Sue Kressly and the OP Support Team. Click the  button to view a PDF of an excerpt from the email.

Press **CTRL F** on your keyboard to search this page for a specific Portal Update Tip & Trick.

### Featured Tips & Tricks

**September 30, 2021**



*Intelichart forms functionality*  
*Unsharing a document to the Portal*

**September 24, 2021**



*PIN Generation in OP*  
*Enable Live-Scheduling for Flu Clinic*

**September 16, 2021**



*Troubleshooting Frequent Registration/Activation Issues*

**September 8, 2021**



*Helping parents find shared documents*

**September 2, 2021**



*Scheduling high-volume vaccine clinics*

**August 26, 2021**



*Minor age limit setting*  
*Templates for Self-Scheduling (Flu or COVID vaccine clinics)*  
*Display of Diagnostic Tests on the portal*

**August 19, 2021**



*Avoiding invalid CHADIS survey failure*

**July 28, 2021**



*CDAs on the portal*

**July 20, 2021**



*Validating CHADIS surveys*

**July 15, 2021**



*Staff leaving your Practice*

**July 9, 2021**



*Lab results on portal*

**July 1, 2021**



*Assessment Character Limits*

**June 23, 2021**



*eLabs and potentially sensitive tests*  
*Workflows for accurate insurance information*

**June 15, 2021**



*Patient-friendly visit assessment language*  
*Data withhold dates: Last Call*

**June 8, 2021**



*CHADIS articles on teen and teacher workflows*  
*Assign staff to receive Portal self-registration messages*  
*Data withhold dates*

**May 26, 2021**



*Removing data withhold dates*  
*CHADIS workflows updated resources*

**May 19, 2021**



*Self-scheduled vaccine clinics*  
*CHADIS survey error messages*

**May 13, 2021**



*Parents/patients linking to a second practice*  
*Portal status SQL*

**May 4, 2021**



*Protect sensitive medications*  
*Help identifying sensitive data*  
*Appointment cancellations*

**April 27, 2021**



*Clean up the Problem List for null values on the Patient Portal*  
*Upcoming change for sending Lab Results to the Patient Portal*  
*Upcoming change for growth curve percentiles on the Patient Portal*

**April 19, 2021**



*Understanding contact information to drive reminders*  
*Turning off portal messaging alerts for Patient Message Exchange*

**April 12, 2021**

*Cleaning up the Problem List to address sensitive information*  
*Archive records after hours*

**March 29, 2021**

*Inactivating patients in OP and the IntelliChart Portal*  
*Getting self-registration messages to your practice team*

**March 19, 2021**

*Don't delete Survey Tasks*  
*Avoid duplicate Surveys and Tasks*  
*Make it easier for families to find Portal Documents*

**March 12, 2021**

*How parents can view Patient Instructions on the portal*  
**Note:** See **OP Patient Portal Parent Experience: Access a Patient's Clinical Summary** for a quick reference guide that includes instructions for how to share the guide with your parents/patients.

**March 4, 2021**

*Parents should see historical medications in the Medication List*  
*Copy/paste functionality doesn't always work for PINs and/or Survey links*