

OP Patient Portal: Automated Enrollment

Last Modified on 03/15/2024 11:51 am EDT

About

Automated Enrollment is an **optional** feature that initiates the automatic sending of Patient Portal registration emails so that Practice staff does not have to manage the task of issuing individual PINs to patients who have not yet completely created an IntelliChart Patient Portal account. Automated Enrollment emails are triggered behind the scenes while the Practice staff is already doing their normal daily workflows (see Triggers below) and are only sent for patients whose portal status is *Unregistered* or *Pending*.

Because this is an optional feature, it must be enabled by the Practice in the Practice Portal and the Practice can decide which Providers want to participate (see below). There is no setup in OP required for this feature.

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Automated Enrollment Email Triggers

Once Automated Enrollment is enabled, an email is sent when a new appointment is scheduled **or** after a Visit Note is finalized (roughly 24 hours after the finalization). Parents will receive **one** auto-enrollment email per day. Automated Enrollment emails will also be stopped if a patient has opted out or if they have been deactivated.

Important: Because portal enrollment is tied to the patient's name and date of birth, it's important to take into consideration patients registered with an unofficial name, such as Baby Boy or Baby Girl. If patients are registered in this way, their Basic Info must be updated to reflect the patient's given name **before** an appointment is scheduled or a Visit Note is finalized.

Email Recipient and Details

Recipient

The Automated Enrollment email is sent to the patient's primary Family Contact listed (sort 1) if the contact:

- Has Joint or Exclusive Authority **or** resides with the patient (Res? checkbox selected)
- Has a Preferred Contact Method for Reminders selected (the field is not blank)

If, however, a patient's primary Family Contact does not have an email address entered into OP but the patient has an email

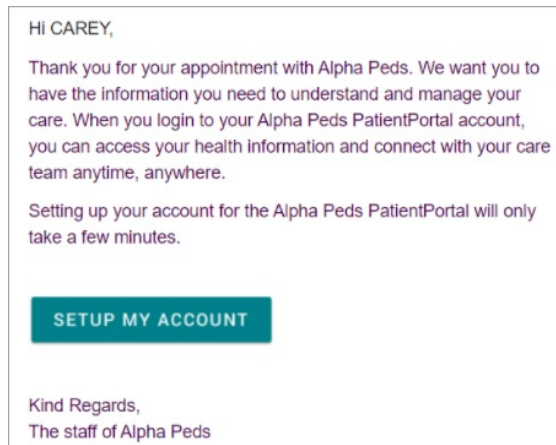
entered into their Basic Information, the email will be sent to the patient's email address as long as their Preferred Contact method for Reminders is also set to Home Email. If contact criteria are met for both the Family Contact and the patient, the Family Contact prevails.

Details



Important: The email has a sender of **no-reply@patientportal.net**, so make sure to let parents know that this is a valid email authorized by the practice, and they should check their Spam or Junk email folders if the email is not received.

At this time, the content of the email cannot be edited or changed. Here is a sample image of the email the parent/guardian will receive:



If the patient's preferred language in OP is set to Spanish, the Automated Enrollment email will be sent in Spanish.



Note: A parent/patient will receive the PIN by the selection of text or email. There is no action a practice must take to issue a PIN. For information on the parent/patient experience for Automated Enrollment, please refer to [this Quick Reference Guide](#).

Enable Automated Enrollment for Practice and Providers

Once Automated Enrollment is enabled at the Practice level, every provider is opted in, by default. If a Provider does not want their patients to receive Automated Enrollment emails following the scheduling of an appointment or the finalization of a Visit Note, a Practice Administrator must then disable the Automated Enrollment setting for that Provider.

Practice Automated Enrollment Setting

1. In the Practice Portal, navigate to: **Main Navigation Panel > Portal Management > General Settings**
2. Review the below setting for participating in Automated Enrollment at the practice level.
 - **Checked:** The Practice will participate in Automated Enrollment. Follow the steps in the below section to disable individual Providers who wish to opt-out.
 - **Unchecked:** The Practice will **not** participate in Automated Enrollment. When unchecked you may not enable Providers to participate in Automated Enrollment.



Participate in Automated Enrollment (Enterprise On)

Self Registration (Enterprise On)

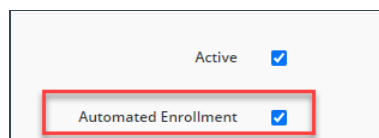
Require Address (Enterprise On)



Note: If the **Participate in Automated Enrollment** checkbox is not displayed in your Practice Portal, contact **OP Support**.

Disable Providers Who Want to Opt-out

1. Navigate to: **Main Navigation Panel > User Administration > Providers**
2. Select the Provider who wants to opt-out.
3. Deselect the **Automated Enrollment** checkbox.



Active

Automated Enrollment

4. Click **Save**.
5. Repeat these steps for any additional Providers who want to opt-out of Automated Enrollment.

Parent Steps from Automated Enrollment Email

When the parent/guardian receives the Automated Enrollment email, they simply need to click the link and follow the prompts. They will have the option to request their PIN via text message or phone call. **Text is recommended.** A parent quick reference guide detailing the steps can be found [here](#). Follow the **Sharing Instructions** at the top of the page to share this guide with your parents.



Important: If the parent/guardian already has a portal account established for another child: After receiving their PIN, they should log into their **existing** portal account, go to **My Account > Add Child/Dependent**, and add the new PIN.