InteliChart Practice Portal: Page Template Descriptions

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About

The InteliChart Practice Portal is delivered with a collection of Page Templates that are used to communicate with parents/guardians via email, text, or on-screen in the Patient Portal. Each Page Template starts out as a System Template but can be copied to a Practice Template where the verbiage can be customized to meet the Practice's needs. Below is a list of the Page Templates that come with the InteliChart Practice Portal and a description for each. Click **here** to learn how to review and customize Page Templates for your Practice.

Page Templates & Descriptions

> **Note**: Java must be enabled in order to use the filter and sort function.To quickly find the form you want in this table, use Filter or Sort:
> - **Filter**: Enter specific keywords in the filter bar. Rows are displayed based on the characters in the row that match what you typed into the filter bar. **Do not use commas to separate keywords**
> - **Sort**: You can sort A - Z and Z - A by clicking on a column header.

Show 50 entries

Filter:

Location (Folder > Subfolder)	Page Template	Description
App-Specific Access	Send Passcode Email	Email sent to the patient providing a Passcode giving the patient the ability to sign into third-party apps.
App-Specific Access	Send Passcode Text	Text sent to the patient providing a Passcode giving the patient the ability to sign into third-party apps.
Confirmations	Bill Pay (only available with Advance Bill Pay)	Email sent to the patient with payment details.
Confirmations	Medical Record Request Confirmation	On-screen text displayed in the Patient Portal when a parent/guardian submits a Medical Record Request.
Confirmations	Professional Account Confirmation	Email sent to employees when an account is created in the Practice Portal. This provides the link to activate the account.
Disclaimers	Medical Record Disclaimer	On-screen text displayed in the Patient Portal when a parent/guardian is completing a Medical Record Request.
Disclaimers	Medication Refill Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Refill".

Location (Folder > Subfolder)	Page Template	Description
Disclaimers	New Message Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Compose new message".
Disclaimers	Referral Request Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Referral Request".
Disclaimers > Appointments	Appointment Cancel Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Cancel Appointment".
Disclaimers > Appointments	Appointment Request Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Request an Appointment".
Disclaimers > Appointments	Appointment Reschedule Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Reschedule Appointment".
Disclaimers > Appointments	Generic Appointment Request Disclaimer	Pop-up disclaimer in the Patient Portal displayed when the portal user selects "Request an Appointment". *When using Generic Appointment Request.*
Live Scheduling	Appointment Requested	Pop-up in the Patient Portal when the portal user selects "Request an Appointment". *When using the Live Scheduling feature.*
Live Scheduling	Appointment Slot Taken	Pop-up displayed in the Patient Portal letting the portal user know that the appointment they are requesting is no longer available.
Live Scheduling	Live Appointment Successfully Scheduled	Pop-up displayed in the Patient Portal letting the portal user know that the appointment their appointment was successfully scheduled.
Messages	Account Unlinked Message	Email notification sent to a guardian alerting them when their child is reaching the age of maturity and the child account will no longer be accessible through their account.
Messages	Practice Portal Account Unlinked	Email notification sent to a guardian alerting them the Practice has manually removed the child association from their account.
Messages	Proxy Unlinked from Account Message - Patient	Email notification sent to the patient alerting them the Practice has manually removed the Proxy association from their account.
Messages	Proxy Unlinked from Account Message - Proxy	Email notification sent to the Proxy alerting them the Practice has manually removed their association on the patient's account.
Notifications > Appointments	Appointment Cancellation Notification Email	Email notification sent to the portal user when their appointment has been canceled.

Location (Folder > Subfolder)	Page Template	Description
Notifications > Appointments	Appointment Cancellation Notification Text	Text notification sent to the portal user when their appointment has been canceled.
Notifications > Appointments	Appointment Reschedule Notification Email	Email notification sent to the portal user when their appointment has been rescheduled.
Notifications > Appointments	Appointment Reschedule Notification Text	Text notification sent to the portal user when their appointment has been rescheduled.
Notifications > Appointments	New Appointment Notification Email	Email notification sent to the portal user when a new appointment has been created.
Notifications > Appointments	New Appointment Notification Text	Text notification sent to the portal user when a new appointment has been created.
Notifications > Forms	FormNotificationNonPortalUserEmail	Email notification sent to a non-portal user that they have forms to complete. *Based on form delivery rules in place.*
Notifications > Forms	FormNotificationPortalUserEmail	Email notification sent to a portal user that they have forms to complete. *Based on form delivery rules in place.*
Notifications > Messages	New Message Notification Email	Email notification sent to alert the portal user they have received a new message in their portal.
Notifications > Messages	New Message Notification Text	Text notification sent to alert the portal user they have received a new message in their portal.
Patient Accounts > PasswordResetConfirmation	Change Username - Staff to Patient	Email notification sent to the Patient Portal user that their Username has been changed.
Patient Accounts > PasswordResetConfirmation	Password Reset - Staff to Patient	Email notification sent to the Practice Portal user that their Username has been changed.
Patient Intake	These Page Templates are not currently used.	These Page Templates are not currently used.
Patient Schedule	These Page Templates are not currently used.	These Page Templates are not currently used.
Registration	Send Pin Email	Email notification the patient receives when a PIN is issued through the Practice Portal. This invites the patient to complete the registration process using the PIN sent.
Registration	Parent/Guardian Create Account	Email notification the parent/guardian receives when a PIN is issued through the Practice Portal. This invites the parent/guardian to complete the registration process using the PIN sent.
Registration	Parent/Guardian Existing Account	Email notification the parent/guardian receives when a PIN is issued through the Practice Portal. This prompts the parent/guardian to add a minor to their existing portal account.

Location (Folder > Subfolder)	Page Template	Description
Registration	Send Pin Text	Text notification the patient receives when a PIN is issued through the Practice Portal. This invites the patient to complete the registration process using the PIN sent.
Registration	Send Verification Question Email	Email notification the patient receives when the Practice uses a Verification Question to initiate registration. This invites the patient to complete the registration process using the Verification Question.
Registration	Send Verification Question Text	Text notification the patient receives when the Practice uses a Verification Question to initiate registration. This invites the patient to complete the registration process using the Verification Question.
Reminders > Appointments	Appointment Reminder Email	Email notification sent to patients to remind them of their scheduled appointment date and time. *These notification preferences are set by the patient in the Patient Portal.*
Reminders > Appointments	Appointment Reminder Text	Text notification sent to patients to remind them of their scheduled appointment date and time. *These notification preferences are set by the patient in the Patient Portal.*
Requests > Appointments	Appointment Cancellation Request	Email notification sent to the portal user to show the Appointment Cancellation request with reason, location, Provider's Name, Appointment Reason, Date, and Time.
Requests > Appointments	Appointment Reschedule Request	Email notification sent to the portal user to show the Appointment Reschedule Request with reason, location, Provider's Name, Appointment Reason, Date and Time, preferred appointment dates, and time.
Requests > Appointments	New Appointment Request	Email notification sent to the portal user to show the Appointment Request with reason, location, Provider's Name, Appointment Reason, Date, and Time.
Requests > Documents	Document Request	Email notification sent to the portal user to show the Document Request with Requested By, For, Document Requested.
Requests > Medical Records	Medical Record Request	Message contents when a parent/guardian submits a Medical Record Request from the Patient Portal.
Staff Accounts	Password Reset Confirmation	Email notification sent to staff user that a password change request has been sent for their account and if they did not initiate the request to contact the Administrator. A link to reset the password is provided.

Showing 1 to 48 of 48 entries

Previous