OP Patient Portal Learning Journey

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An interactive guide through setting up and using the portal

About the Journey

Each **Course** in this journey contains short, topic-based **Lessons** to teach you the skills you need to implement and manage a successful Patient Portal. After completing the last Lesson in each Course, you'll have the opportunity to take a **Knowledge Check** to test what you've learned in the Course. To make the most of your learning experience, we encourage you to replicate the setup and workflows you're learning in your Practice's portal using your Test Patients.

Journey Key and Itinerary

We know that each Practice is different, as are the Roles within each Practice. While all Courses are not applicable to everyone, it is important that each staff member understands how to interact with the Patient Portal from OP, as defined by their Role(s) in the Practice. We recommend that you and/or your Practice's Portal Administrator follow these steps to get started:

1. Hover over the Roles listed in the Key below to see how we've defined each Role, and decide which Role(s) best fits you.
2. Review the Course list to see which Courses contain Lessons applicable to your Role(s).
3. Go to the Course pages and determine which Lessons are applicable to you. Print this **checklist** to keep track of which Lessons you've been assigned. Please note that your progress is **not saved**, so the checklist is also designed to help you keep track of where you are in your journey.

Key	Portal Administrators	⊘ Non-Clinical Staff	💼 Clinical Staff / Providers

Prepare OP for the Patient Portal   *Estimated Duration: 40 minutes*

Course 1

Learn the areas of OP that require review and cleanup before implementing your Practice's Patient Portal. The skills learned in this Course are essential in validating that your OP data is governed in a way that will be accurately received by the portal.

Go to Course page >>>

Log Into and Navigate the Practice Portal   ⊘ 💼 *Estimated Duration: 15 minutes*

Course 2

Learn how to log into and navigate the Practice Portal as an Administrator.

Go to Course page >>>

Portal Setup and Configuration   *Estimated Duration: 50 minutes*

Course 3

Learn the setup required in the Practice Portal to ensure that Practice staff can interact with the portal as their roles require and how to enable several key portal features.

Go to Course page >>>

Appointment Request and Live Scheduling Setup   *Estimated Duration: 15 minutes*

Learn how to configure optional Scheduling features so that your families can request or schedule

Course 4

appointments directly from the Patient Portal.

Go to Course page >>>

Course 5

Daily Portal Activities ⊘ ▮ *Estimated Duration: 30 minutes*

Learn how to register patients for the Patient Portal and manage portal messages and other requests.

Go to Course page >>>

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Wondering what the parents' experience is like as they're completing their portal registration and corresponding with the Practice? Take a detour to the **Parent Experience** -- you'll have access to the **Parent Toolkit**, which includes sharing instructions for resources designed for your Practice's families, and other educational resources so that you can familiarize yourself with the steps a parent will take when using the Patient Portal.

Course 6

Surveys ⊘ ▮ *Estimated Duration: 25 minutes*

Learn the requirements and workflows for sending Surveys to the Patient Portal.

Go to Course page >>>

Course 7

Documents ⊘ ▮ *Estimated Duration: 15 minutes*

Learn the requirements and workflows for sending Documents, both originating from OP and previously saved in Document Management in OP, to the Patient Portal.

Go to Course page >>>

Course 8

Self-Registration ⊘ ▮ *Estimated Duration: 15 minutes*

Learn how to enable self-registration, an optional feature that allows new patients to register for the Practice and established patients to register for the portal without a PIN.

Go to Course page >>>