OP Practice Portal: Configure Provider Search

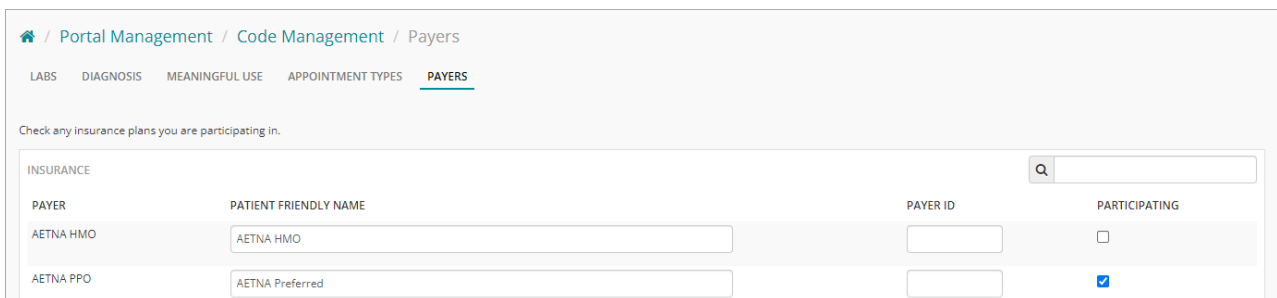Last Modified on 11/04/2021 2:07 pm EDT

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About

Provider Search is an optional feature that gives portal users the ability to search for a Provider from the Patient Portal using Facility, Specialty, Location from their zip code, Participating insurances, and Gender filters. To optimize this search experience, Practice Portal Administrators with the Code Management > Payers permission can configure the Participating Insurance Plans (Payers) so that their Providers are listed with the insurances that they accept. Additionally, portal users can request or schedule appointments directly from the Provider Directory window, if these features are enabled by the Practice.

Review Patient Friendly Insurance Names and Select Participating Payers

Your Insurance Payer List from OP is populated in your Practice Portal, both at the Provider record-level and as a Payer List. Start by visiting the Payer List in the Practice Portal and reviewing the Patient Friendly Names (what parents or guardians will see when searching for a Provider) and selecting the Payers that the Practices participates with (these will be displayed in the Participating insurances filter drop-down menu in the Patient Portal).

1. Navigate to the Practice Portal Payer List: **Navigation Panel > Portal Management > Code Management > Payers.**
2. Review the **Patient Friendly Name** column for all payers that your Providers participate with, and make edits as needed.
3. Select the **Participating** checkbox for all Payers that the Practice participates with.

4. *(Optional)* If the selected Participating Payers should be applied to all Providers, select the **Apply to all Providers** checkbox located at the bottom of the page. By selecting this checkbox, all Provider records in the Practice Portal will be updated to have the selected Payers checked.
5. Click the **Save Settings** button.

Select Participating Payers, by Provider

If you were not able to apply Participating Insurances to all Providers in Step 4 above because it was not appropriate to do so, Participating Insurances should be set at the Provider level.

1. Navigate to the Providers List in the Practice Portal: **Navigation Panel > User Administration > Providers**.
2. In the list of Providers, select the Provider you'll be starting with.
3. Scroll to the Participating Insurance Plans section of the page.
4. Select the checkbox(es) for the Insurance Payers that the Provider participates with.

5. Click the **Save** button.
6. Repeat the above steps for all Providers.

Enable Provider Search

After completing your Participating Insurance Payer setup, you're ready to enable Provider Search. Note that this may be enabled before or after you establish your Participating Insurances, but by enabling this feature last, you're providing the most comprehensive search from the beginning.

1. Navigate to Portal Features in the Practice Portal: **Main Navigation Panel > Portal Management > Patient Interface > Manage Setup**.
2. In the Portal Features list, locate **Provider Search**.
3. Click the toggle to set it to the **ON** position.
4. Scroll down to the Find a Provider Settings section of the page, and select **All Enterprise Providers** or **Our Providers Only** radio button.
5. Click the **Save** button located at the bottom of the page.

How Participating Insurances are Displayed in Provider Search on the Patient Portal

The **Find a Provider** option is located in the My Health menu of the Patient Portal Navigation Panel. Once clicked, the Provider Directory is displayed featuring filter options at the top of the page and the list of Providers below. For Providers who have Live Scheduling and/or Appointment Requests enabled, the parent/guardian can also schedule or request an appointment from here.