Customize Patient Home Page in the OP Portal

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About

Widgets are the sections that appear on the patient's OP Portal home page and the Medical Records page. They can be clicked on to navigate to different pages, and/or expanded to see more information, based on the type. Widget placement can be customized on the Home page and Medical Records page to enhance the patient/parent experience, and custom widgets can be created for the Home page.

- Rearrange, Disable or Enable Widgets on the Home Page
- Rearrange, Disable or Enable Widgets on the Medical Records Page
- Add and Edit Custom Widgets (Home Page)
- Add, Edit, and Remove Custom Mini Widgets (Home Page)

The widgets are divided into four different types, and can be customized on the Admin side in **Settings** > **Widgets**, **Custom Widgets**, or **Custom Mini Widgets** pages:
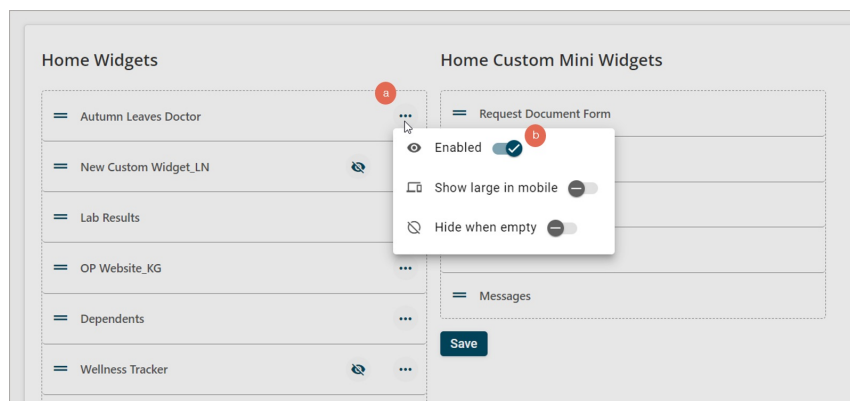
- **Home Widgets**: The main widget boxes on the home page. You CAN create custom widgets for the Home Page.
- **Home Custom Mini Widgets**: The three bar widgets at the top of the home page. You CAN create custom mini widgets for the Home Page.
- **MR Mini Widgets**: The bar widgets on the right side of the Medical Records page. You CANNOT create custom widgets for Medical Records.
- **MR Widgets**: The main widget boxes on the Medical Records page. You CANNOT create custom widgets for Medical Records.

Rearrange, Disable or Enable Widgets on the Home Page

To rearrange the widgets on the OP Portal Home Page:

1. From the navigation menu, click **Settings** > **Widgets**.
2. The Home Widgets and Home Custom Mini Widgets are located at the top of the page.
3. To **rearrange** widgets, click the widget and hold ⊕ to drag and drop to the placement you want.
4. To **hide/disable** widgets,

   a. Click the **ellipsis** button next to the widget.
   b. Click to toggle off the **Enabled** button.

5. To **enable** hidden widgets,

   a. Click the **disabled** button 👁 OR
   b. Click the **ellipsis** and toggle <u>on</u> the **Enabled** button.

6. Click **Save** after updating each of the sections (the Save button for each section is below each list of widgets for that section).

Rearrange, Disable or Enable Widgets on the Medical Records Page

To rearrange the widgets on the OP Portal Medical Records Page:

1. From the navigation menu, click **Settings** > **Widgets**.
2. Scroll down to the MR Mini Widgets and MR Widgets.
3. To **rearrange** widgets, click the widget and hold ⊕ to drag and drop to the placement you want.
4. To **hide/disable** widgets, click the widget and hold ⊕ to drag the widget from the Active Widgets column to the**Inactive Widgets** column.
5. To **enable** hidden widgets, click the widget and hold ⊕ to drag the widget from the Inactive Widgets column to the **Active Widgets** column.
6. Click **Save** after updating each of the sections (the Save button for each section is below each list of widgets for that section).

Add and Edit Custom Widgets (Home Page)

To add a new Custom Widget to the parent's home page:

1. From the navigation menu on the left, click **Settings** > **Custom Widgets**.
2. Click **Add New**.
3. Edit the widget accordingly. The editor is a WYSIWYG editor, and you can include formatted text, images, and links.
4. Click **Save**.
5. The widget will appear on the parent/patient home page. To rearrange the position of the Custom widget, follow the steps above for rearranging widgets.

To edit the content of a Custom Widget:

1. Navigate to **Settings** > **Custom Widgets**.
2. Select the widget.
3. Edit accordingly.
4. Click **Save**.

Please note: Custom Widgets cannot be deleted, they can only be disabled on the Widgets page, or edited from Custom Widgets.

Add, Edit, and Remove Custom Mini Widgets (Home Page)

You can create a mini widget from any of the content available on the left-hand side of the portal navigation. These mini widgets act as links to main pages in the OP Portal (eg you can create a Mini Billing widget for the top of the home page that will allow the patient/parent to easily click and navigate to the Billing page).

To add a new Custom Mini Widget:

1. Get the URL path (**Route**) to the page you want to create a Mini Widget for by navigating to the page on the patient side and copying the page URL. The main page Routes are below:
   - **Appointments**: /panel/appointments

- **Billing**: /panel/billing-balance/balance
- **Messages**: panel/messages
- **Medical Records**: /panel/medical-records
- **Documents**: /panel/medical-records/documents
- **Refill Request**: /panel/prescriptions
- **Results > Lab Results:** /panel/results/labs-orders
- **Results > Documents**: /panel/results/documents
- **Patient Education**: /panel/patient-education

2. On the Admin side, navigate to the Custom Mini Widget page:**Settings** > **Custom Mini Widgets**.
3. Click **Add New**.
4. Enter the Mini Widget information:
   - **Route**: Paste the page URL from above here.
   - **Icon**: Use a Material Icon name by navigating to the linked site, selecting the icon you want to use, and clicking **Copy Ligature**, then pasting in the Icon field.
   - **Title** (English and Spanish): Add the title of the Mini Widget, the page name.
   - **Subtitle** (English and Spanish): Enter the description, which will appear below the title on the Mini Widget.
5. Click **Save**.
6. Navigate to **Widgets** and follow the steps to rearrange the Mini Widget on the homepage.

To remove a Custom Mini Widget:

1. Navigate to **Settings** > **Custom Mini Widgets**.
2. Select the Mini Widget.
3. Click Click the **Remove** button at the top.

To edit the content of a Custom Mini Widget:

1. Navigate to **Settings** > **Custom Mini Widgets**.
2. Select the Mini Widget.
3. Edit accordingly.
4. Click Save.