Messaging Configuration in OP Portal

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About

There are different core messages types available in the OP Portal. Message types and tags allow requests like Appointment Requests, Rx Refill Requests and Document Requests to be sent to the appropriate staff member in OP. You have the ability to configure these message types, as well as set who the messages are routed to in your practice by using tags, if you need to update after initial configuration.

If your practice has selected to enable "Message My Doctor", this article will also review the initial configuration and adding new question types if selected.

Core Message Types

The following are the core message types that are supported within the patient portal. These message types are essential for ensuring effective communication between patients and healthcare providers:

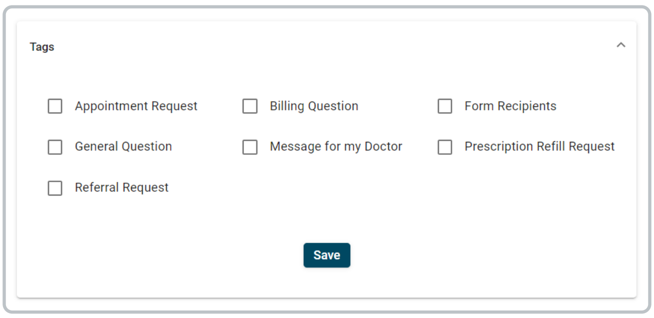
- Appointment Request (facilitated through the Appointments Module)
- Billing Questions
- General Messages
- Medication Refill (facilitated through Refill Requests)
- Referral Request
- Document Requests (facilitated through the Forms Module)

Message Tags

Tags function as question types that parents can select when sending messages, or in a specific place on the OP Portal as outline above. These messages with the associated tags are sent to a group of assigned staff. When you first get the OP Portal, all of your staff will be configured to receive the requested Message types using Tags. If you need to update your Staff to receive or not receive certain message types in the future, you can assign or remove them to tags from their Staff Permissions.

Assign a staff member to a tag:

1. From the navigation menu on the left, select **Settings** > **Staff Permissions** to manage staff settings..
2. Use the search functionality to find the **staff member** you wish to route messages for.
3. Click to expand the **Tag** section.
4. Check or uncheck the relevant **tag(s)** to associate with the staff member:



5. After selecting the appropriate tags, click **Save** to confirm the routing configuration.

To create a new tag:

1. From the navigation menu on the left, select **Settings**.
2. Click on **Message Tags**.
3. Select **Add Tag** in the top right corner.
4. Fill in the required information:
    - **Code**: Unique identifier for the question type. Example: general-message
    - **Tag Name**: The label that the patient will see as an option in the select dropdown for the question type.
    - **Tag Instruction**: No input required for this field.
5. Select Appropriate Checkboxes
    - **Send Message To EMR**: Leave this box unchecked.
    - **Create task in Tasking Center**: Leave this box unchecked.
    - **Not Show to Patient**: Leave this box unchecked.

Locations for Message Routing

In your initial configuration, you would have provided OP a list of your staff and their associated locations for the question types. Location-based routing ensures that messages are directed to staff members at the appropriate clinic or office. This feature is particularly useful for practices with multiple locations, allowing for advanced filtering where users can share a tag but receive messages based on their specific location.

Locations will be created automatically, but if a staff member moves to a different location you can assign them to another location:

1. From the navigation menu on the left, select **Settings** > **Staff Permissions** to manage staff settings.
2. Use the search functionality to find the **staff member** you wish to route messages for.
3. Click to expand the **Location** section.
4. Check or uncheck the relevant Locations(s) to associate with the staff member.
5. Click **Save** when finished.

Message My Doctor Configuration

Your practice can select whether you want your patients/parents to message your doctors directly, or route certain messages to other staff members to answer. The options are as follows:

- Yes, define below:
    - All Providers In Clinic *OR,*
    - All Providers patients have seen in the past (defined by appointment history of 3 years).
- No

If messages to doctors are allowed, will the provider message be routed to:

- The **provider** and their **staff associated** (If this was selected, you would have shared with OP a list of the staff associated with each provider) *OR,*
- Just the **provider** *OR,*
- Just the **staff** (If this was selected, you would have shared with OP a list of the staff associated with each provider) *OR,*
- Practice defines routing (uncommon, and you set up your own routing rules).

Categories for Message My Doctor

Categories allow administrators and staff to create a list of sub-questions for the provider level under the **Message For My Doctor** feature. This enables patients to select specific types of inquiries (e.g., questions about results, treatment, or follow-ups), ensuring that the right team handles the message efficiently. To add another Message Category,

1. From the navigation menu on the left, select **Settings**.
2. Click **Message Categories**.
3. Click the **Add New** button.
4. Fill in the required fields.
5. Click **Save**.