Update Custom Texts in the OP Portal

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About

Custom Texts in the OP Portal are any type of text that that can be customized for view by your parents/patients. The types include Forms, Legal Disclaimers, Messages (such as the Welcome Email), Support Subjects, and Warnings (appear on top of different pages in the OP Portal). This page will go over how to update certain Custom Texts, but the instructions can be applied to all types of Custom Texts.

- Warning Banners
- Welcome Email
- Legal Disclaimers

Warning Banners

Warning banners are available throughout the portal to allow the practice to convey information to the portal user. They can be used for one time communication (e.g. The clinic is closed due to inclement weather), seasonal greetings, marketing (It's time for sports physicals and back to school vaccines) or communication regarding expectations and office policies (e.g. Turnaround time for messages is 24 hours, For urgent problems, call 911 or go to the nearest ER, etc.).

Add a Banner to a Page

Warning Banners can only be customized and enabled, they are not 'added' like widgets. They can be enabled on all pages in the OP Portal, including the Login page, Homepage, Appointments, etc. To customize and enable a Warning Banner on a page:

1. From the navigation menu on the left, select **Settings**.
2. Click **Custom Texts**.
3. Click on the dropdown field **Group*** and click on **Warnings**.
4. Select the page you want to update the text on. You can type in the Search bar to easily find the page.
5. Click "English" or "Spanish" (depending on the notification language that applies)
6. Write the message in the text box, including any images or links you want to add.
7. Select the **Info Level** drop-down to change the color and type of notification:
   - **Alert** is red.
   - **Warning** is orange.
   - **Informational** is blue.
8. Check the **Enabled** box.
9. Click on **Save**.

Edit a Banner on a Page

1. Navigate to **Settings** > **Custom Texts**.
2. Click the **Group*** drop-down and select **Warnings**.
3. Select the **page** you want to edit the banner on.
4. Edit the **Text** in the field. If you want to replace what is there, simply delete the current banner text/images and add your updated text.
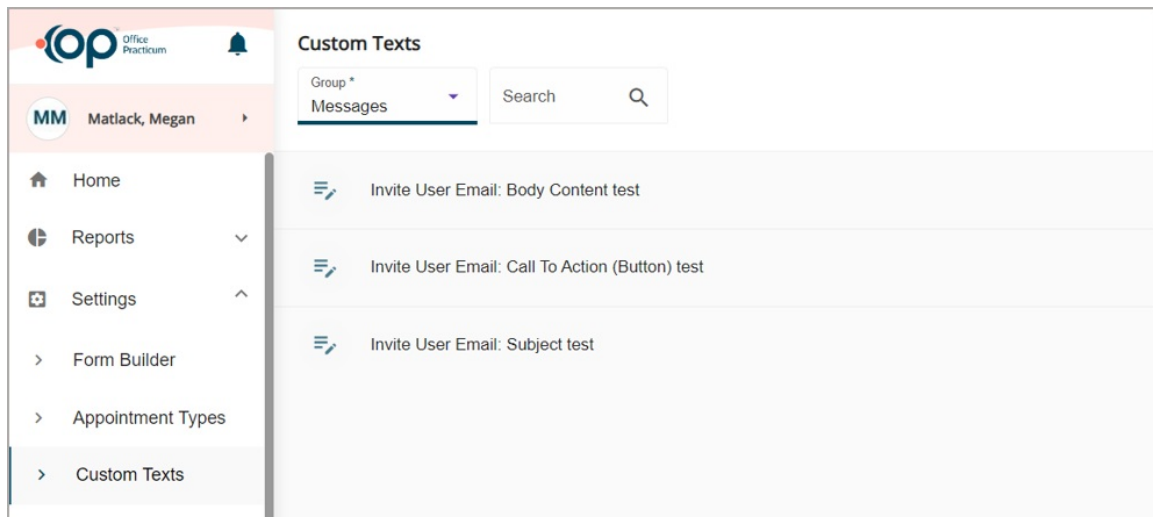5. Click **Save**.

Disable a Banner

Warning Banners can only be disabled or enabled, they cannot be created/added or deleted. To disable a Warning Banner from appearing on a page:

1. Navigate to **Settings** > **Custom Texts**.
2. Click the **Group*** drop-down and select**Warnings**.
3. Select the **page** you want to disable the banner on.
4. Scroll down and uncheck the**Enabled** box.
5. Click **Save**.

Welcome Email

To update the Welcome email:

1. From the navigation menu on the left, click**Settings** > **Custom Texts**.
2. Click the **Group** drop-down and select **Messages**.
3. Select the section of the email you want to update.

4. Update the text.
5. Click **Save**.

Legal Disclaimers

Email Disclaimer

Follow these steps to edit the email disclaimer:

1. From the navigation menu on the left, select**Settings** > **Custom Texts**.
2. Click on the **Group** drop-down and select **Legal Disclaimers**.
3. Click on **Email Disclaimer**, select the language in which the Email Disclaimer will be edited.
4. Update the text.
5. Click **Save**.

Terms & Conditions or Privacy Policy

Follow these steps to edit the Terms & Conditions or Privacy Policy:

1. From the navigation menu on the left, select**Settings**.

2. Click **Custom Texts**.
3. Click on the dropdown field **Group** and click on **Legal Disclaimers**.
4. Click on **Terms & Conditions** or **Privacy Policy**.
5. Select the language in which the document will be edited.
6. Update the text.
7. Click **Save**.