OP Portal FAQs

Last Modified on 11/01/2024 10:55 am EDT

The content in this article is relevant to the OP Portal.

Why didn't the parent receive the OP Portal Welcome Email?

If a parent states that they have not received their Welcome email, navigate to the patient's **Family Contacts** and check their **Authority** and **Email Address**. If both are correct, you can always resend the Welcome email by clicking **Register** and confirming you want to send another email. This is especially helpful if they have a new email address.

Why aren't my customizations showing on the OP Portal home page?

Any changes to Widgets, new warning messages, etc. can take 15 minutes or longer to update in the portal.

Merchant Services: Which ones work with the OP Portal?

- **Instamed** is the preferred vendor. However, we will work with other vendors on a case by case basis.
- If your practice uses a bank and the parents are currently accessing payments via a URL, this can be added to a **custom widget** and/or **warning message** (in the **Billing** section) on the OP Portal to allow payments to be collected easily. See the pages for Updating Custom Texts or Customizing Your OP Portal Home Page for more instructions.

How do I add a Parent/Guardian/Family Contact to the OP Portal if they are also a patient?

To add the parent/guardians portal account to show their own patient account as well as their dependent(s):

1. Confirm they are listed as a Family Contact in the child's/dependent's chart with the required fields.
2. Navigate to the *parent's/guardian's* **Patient Chart** > **Family Contacts**.
3. **Add** the Family Contact in the parent's chart: Search by Last name and click on the existing contact record to highlight, then click **Select**. Confirm/Add the details:
   - Their **Role/Reason** *cannot be* Self. We recommend setting the Role/Reason to **Other Relative**.
   - The **Authority** must still be set to either Joint or Exclusive.
   - Confirm the **Email address**.

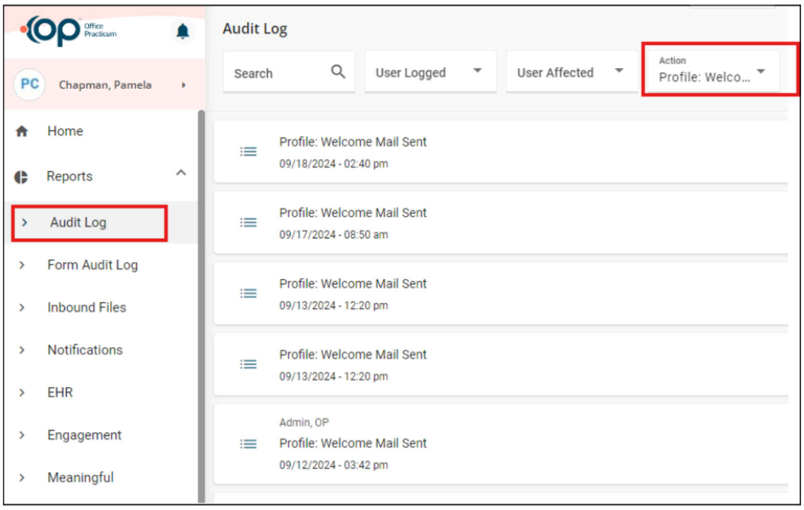
After the parent/guardian has registered, they will now see themselves as a dependent on their OP Portal account, as well as any children/other dependents.

> **Please Note**: If a parent/guardian is also a patient at your practice, and already has an entry in their own Family Contacts with the **Role/Reason** listed as *Self* , the Welcome email will not be sent.

How can I check if an OP Portal Welcome Email was sent?

1. Log into the OP Portal as an admin.

2. On the left navigation, select **Reports** > **Audit Log**.
3. In the **Action** field, start typing "Welcome" and select **Profile: Welcome Mail Sent**



4. A list of all of the Welcome emails sent, in reverse chronological order, will appear.
   - You can see the **date** and **time** sent in each row item.
   - To see more details such as the person and email address it was sent to **click on the row**.
   - To search for a specific person, click in the **Search** field and type the parent's last name + first name (eg "Smith+John"). Click on that row to see more details.

Why can't the parent/guardian see the patient on their Portal account?

If a parent/guardian cannot see one or more patients when they log into the portal, please follow the steps below to troubleshoot:

Confirm Patient/Parent Details in OP

Confirm Patient is Active in OP

1. Open the patient's **chart**.
2. Click on the **Basic Information** tab.
   - Confirm patient is **Active** OP patient.
   - Confirm there is **no email address** or **N/A**.

If you needed to make the patient Active, or clear their email address, wait a few minutes and then confirm that the patient now shows under the parent/guardian Portal account. If the patient is Active and has no email address, or N/A in the email address field, continue to the next section to troubleshoot further.

Confirm the Parent/Guardian is Active in OP

1. From the Patient Chart, click on the **Family Contacts** tab.
2. Confirm the parent/guardian is added to the patient's Family Contacts.
3. Select the **parent/contact**.
4. Are they **Active**? If yes, continue on to the "Confirm Patient/Parent Details in the OP Portal" section.
5. If they are **not Active**:
   - Check for Duplicate Contacts in Contact Manager:
     1. In OP, go to **Practice Management** tab > **Contact Manager**
     2. First **search** by last name. If no duplicate is found, search by email address.

3. If a duplicate is found, use the Merge Contacts feature.
- If no duplicate found, exit and go to **DAR (Demographic Analysis/Recall)**:
  1. Select **No date restrictions** and click **Search**.
  2. Now **sort** by *email address*. If no duplicates found, sort by *Date of Birth* (**Note**: this is only useful if your practice adds the DOB for contacts).
  3. If a duplicate is found, use the Merge Contacts feature.

If a duplicate was found, and you were able to use the Merge Contacts feature, wait a few minutes and then confirm that the patient now shows under the parent/guardian Portal account. If the parent/guardian still cannot see the patient, continue to the next section to troubleshoot further.

Confirm Patient/Parent Details in the OP Portal

Confirm Patient Details in the OP Portal

1. Navigate to the **Admin** side of the OP Portal > **Users**.
2. Search for the **patient** (last name+first name).
3. **Select** the patient.
4. Does the patient have a *@dummy.com* **email address**?
   - If Yes: Go to the next step.
   - If No: Manually change the email address to a *@dummy.com* email address. Wait a few minutes and then confirm that the patient now shows under the parent/guardian Portal account.
5. Is **Role** *Patient*?
   - If Yes: Continue on to the "Confirm Parent/Guardian Details in the OP Portal" section.
   - If No: Contact OP for further support.

Confirm Parent/Guardian Details in the OP Portal

1. On the Admin side, open **Profile**.
2. Click on **Caregivers**.
   - Confirm the parent/contact is listed here.
3. Navigate back to **Users**.
4. Search for **parent/contact**.
5. Select the parent/contact and click **Profile**.
6. Click on **Dependents**.
   - Confirm the patient is listed here.
7. Refresh the connection:
   1. Click on **Sources**.
   2. Click on **ellipsis** under the Actions column.
   3. Click **Disconnect** then **Confirm**.
   4. Click on the **ellipsis** again.
   5. Click **Connect** then **Confirm**.
   6. Wait 10-20 minutes and see if this resolved the issues.

If the patient still cannot be viewed by the parent/guardian, contact OP for further support.