OP Portal FAQs

Last Modified on 09/10/2024 8:54 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?

If a parent/guardian is also a patient at your practice, the Welcome email will not be sent if their entry in their own Family Contacts is listed *Self* as the **Role/Reason**.

To send the Welcome Email and allow the parent/guardians portal account to show their own patient account as well as their dependent(s),

1. Create a Family Contact in the child's/dependent's chart with the required fields and save.
2. Navigate to the parent's **Patient Chart** > **Family Contacts**.
3. Create a Family Contact in the parent's chart with the required fields. Their **Role/Reason** *cannot be* Self. We recommend setting the Role/Reason to **Other Relative**.
   - The **Authority** is must still be set to either Joint or Exclusive.
   - The **Email address** must match what is on the Family Contacts for the child/dependent.

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