

# Patient Portal Implementation Guide

This guide will serve as your “How To” instruction manual for implementing the Patient Portal offered by OptimisPT into your practice’s workflow.

## What is the Patient Portal?

The Patient Portal is a safe and secure way for your patients to electronically submit their demographic information, insurance information, medical history and even sign required forms all prior to setting foot in your clinic for the evaluation. The best part is, the information they enter will be easily imported into Optimis, decreasing the need for manual entry.

## Benefits to Using the Patient Portal:

- Decrease the patient’s wait time when coming to their Initial Evaluation appointment
- Decrease the time it takes to register a patient saving valuable front desk time and resources
- Alleviate the need to manually scan and upload signed forms; these can now be electronically signed in the portal and imported directly into Optimis
- Eliminate the need for hard copy papers being filled out by the patient leading to manual entry of the information into the system by your staff.

## Mandatory Documents

In preparation for using the Portal, you will want to create and upload any documents or forms that you wish to send to your patients via the Portal. Some examples may include Consent to Treat, HIPAA policies and responsible parties.

Once created, to add these to your Optimis database:

1. Go to the Admin Tab→ Advanced→ Patient Portal.
2. Click “Add Mandatory Document”
3. Select the File to Upload
4. Enter the name of the document (i.e Consent to Treat)
5. Choose either “Signature Needed” or “No Signature Needed” from the drop down
6. Click Add

\*Repeat this process to include additional mandatory documents.

Any Mandatory Document listed will automatically be sent through the Portal allowing the patient to review and sign, if required. You can “archive” a document if you no longer wish to have it sent through the portal.

## PATIENT PORTAL IDEAL WORKFLOW

Here we will lay out the ideal workflow to be used to implement the Patient Portal into your practice. Following these steps will allow for the most efficient implementation process.

### STEP 1: Patient Contacts Clinic to Make Initial Appointment

Front Office Staff enter the minimal required data into Optimis for a new patient:

- First Name
- Last Name
- Date of Birth
- Zip Code
- Email Address

Click "Save".

Once you enter the patient into Optimis, you will send the Patient Portal activation email by clicking "*Send Invitation to Patient Portal*" from the Demographics page.

#### Patient Portal

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Send Invitation to Patient Portal

Inform the patient that they will be receiving an email to access the patient portal. From the email they will click the link and create a password. It is very important that they access the portal and enter their information **PRIOR** to their first visit.

To schedule the patient, you must first create an EOC with the minimal necessary data:

- Injury Type
- Body Region
- Referral Source

You can then schedule the patient for their first visit.

\*The EOC can be updated at a later time when additional relevant information is received.

## STEP 2: Patient Completes Portal Submission

Within the Patient's tab in Optimis, a red number will appear on the upper right corner when a submission from the portal has been received. To review the submissions click "Patient Portal".

### Patients

10 Patient Portal

Search for a patient by name, phone, email address, birthdate, or MRN (start with a #)... Search

+ New Patient

## Portal Updates Tab

The "Portal Updates" tab will show which patients have submitted information.

Portal Updates Invite Emails

### Patient Updates

Patient	MRN	Eval.Clinic	Eval.Date	Portal Updated At	Pulled At	
<a href="#">OME Testagain</a>	1000203088	Maui	10/21/2020	11/02/2020 11:21AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	11/02/2020 09:41AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	09/24/2020 06:23AM HST	04/20/2020 11:03AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	06/01/2020 07:57PM HST	05/28/2020 06:20AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	09/11/2019 09:51AM HST	09/11/2019 09:51AM HST	<a href="#">Review</a> <a href="#">Archive</a>

## Invite Emails Tab

You can go to the "Invite Emails" tab to check the status of the Portal Invites that have been sent to your patients. This will allow you to see if the invites have been activated yet or not. For those that have not yet been activated you can reach out to the patients to remind them to activate their Portal account and enter their information prior to their visit.

Portal Updates Invite Emails

### Invite Emails

Download CSV

Patient	MRN	Eval.Clinic	Eval.Date	Status	Last Sent	Viewed at	Activated at
<a href="#">OME Testagain</a>	1000203088	Maui	10/21/2020	Activated	11/02/2020 11:18AM HST	11/02/2020 11:44AM HST	10/06/2020 07:31PM HST
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	Activated	10/30/2020 03:44AM HST	11/03/2020 02:37AM HST	10/06/2020 10:27AM HST
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	Sent	10/29/2020 07:46AM HST		
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	Activated	10/12/2020 11:08AM HST	10/12/2020 11:08AM HST	04/20/2020 06:26AM HST
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	Activated	04/21/2020 04:54AM HST	05/05/2020 06:12AM HST	04/21/2020 04:55AM HST
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	Activated	09/11/2019 09:07AM HST	09/11/2019 12:21PM HST	09/11/2019 09:12AM HST

\*\*Use the **filters** at the top of each tab to more efficiently search for specific information

## STEP 3: Import Portal Information

## Importing Demographics Information

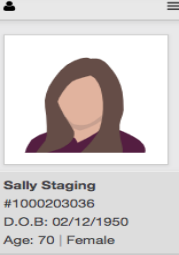
- Click **Patient Portal** in upper right corner of **Patients** tab.
- Click **Portal Updates** tab.
- To review submitted information and import it into the patient's Optimis chart, click **Review** in the far right column.

Portal Updates Invite Emails

### Patient Updates

Patient	MRN	Eval Clinic	Eval Date	Portal Updated At	Pulled At	
<a href="#">OME Testagain</a>	1000203088	Maui	10/21/2020	11/02/2020 11:21AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	11/02/2020 09:41AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	09/24/2020 06:23AM HST	04/20/2020 11:03AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	06/01/2020 07:57PM HST	05/28/2020 06:20AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	09/11/2019 09:51AM HST	09/11/2019 09:51AM HST	<a href="#">Review</a> <a href="#">Archive</a>

- Clicking **Review** will display the information that was submitted, taking you to the Demographics section of the patient's Optimis Chart.
- Any information highlighted in yellow indicates that information is new or has been updated by the patient.
- After reviewing the information, if you wish to import it into Optimis click **Copy to Patient**.



**Sally Staging**  
#1000203036  
D.O.B: 02/12/1950  
Age: 70 | Female

- Demographics
- Contacts
- Payment Sources
- Medicare Services
- Medical History
- Attachments
- Episodes of Care
- Visits
- Payments
- MRNs
- Notes

### Demographics > Portal Review

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**General**

First Name: Sally  
Last Name: Staging  
Birth Date: 02/12/1950  
Marital Status: Other  
Notify by email: true  
Notify by text: true  
Gender: F  
Referred By: N/A  
Address1: 1000 Sunny Lane  
City: Beverly Hills  
State: CA  
Zip: 90210  
Country: United States  
Email: jhelligman+sally@optimispt.com  
Phone: (902) 145-8779 Cell

**Injury Details**

Injury Type: N/A  
Have you received therapy elsewhere this year? N/A  
Any other comments you would like to add?  
Are you interested in a wellness program? N/A

**Medical History**

Existing Conditions  
Diabetes Yes High/Low Blood Pressure Yes Osteoporosis Yes  
Describe any other conditions - If "Yes" to any of the above, please explain and give approximate dates/Describe any other Conditions  
Uncontrolled diabetes

**Fall History**  
 Injury as a result of a fall in the past year? **Yes**  
 Two or more falls in the last year? **Yes**  
 Patient at risk for falls? **No**

**Surgical History**  
 Head and Neck - Cervical Discectomy February 1, 2004

**Medications**  
 Drug: Advair Dosage: 50 mg Frequency: As needed Route: Inhalation Reason: asthma

**Copy to Patient**

**Documents (0)**  
 Copy Selected Document(s) to ...

Type	Alias Name	File	Description	Status
(No document)				

**Signed Documents (2)**  
 Copy Selected Signed Document(s) to ...

Alias Name	File	Status	Signed At
<input type="checkbox"/> NewTest	<a href="#">951bc21e27f95543b6c0d4c097399ffb.pdf</a>	Safe	10/30/2020 03:50AM HST
<input type="checkbox"/> Hart Testing	<a href="#">00947735e714bfe1e859f894ae5dd8cd.pdf</a>	Safe	10/30/2020 03:51AM HST

## Importing Documents

- If there were any documents submitted or any mandatory documents that were signed by the patient in the portal, they will be located in the **Documents** section or **Signed Documents** section of the Portal **Review**.

**Documents (0)**  
 Copy Selected Document(s) to ...

Type	Alias Name	File	Description	Status	Date
(No document)					

**Signed Documents (2)**  
 Copy Selected Signed Document(s) to ...

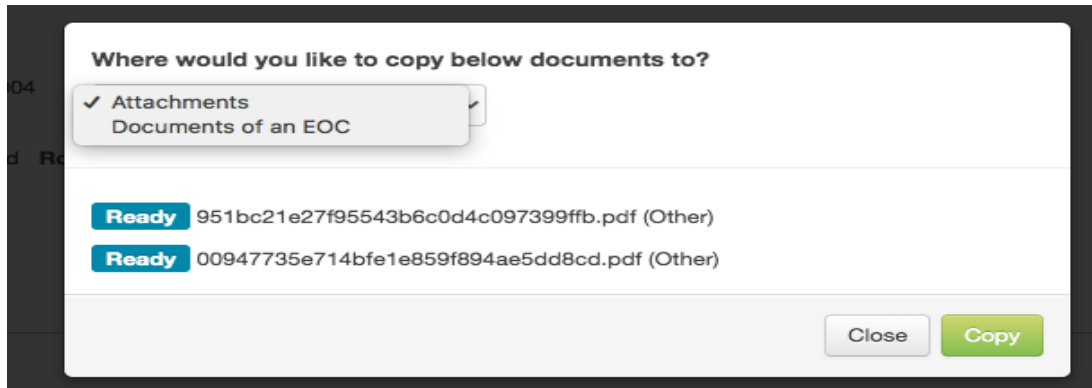
Alias Name	File	Status	Signed At
<input checked="" type="checkbox"/> NewTest	<a href="#">951bc21e27f95543b6c0d4c097399ffb.pdf</a>	Safe	10/30/2020 03:50AM HST
<input checked="" type="checkbox"/> Hart Testing	<a href="#">00947735e714bfe1e859f894ae5dd8cd.pdf</a>	Safe	10/30/2020 03:51AM HST

- Check the box next to the appropriate document to select it and then click **Copy Selected Documents to**.
- From the drop down select where you would like to copy the documents to.
- This will either be the **Attachment** section of the Demographics chart or the **Documents section of the Episode of Care chart**.

### Signed Documents (2)

Copy Selected Signed Document(s) to ...

Alias Name	File	Status	Signed At
<input checked="" type="checkbox"/> NewTest	<a href="#">951bc21e27f95543b6c0d4c097399ffb.pdf</a>	Safe	10/30/2020 03:50AM HST
<input checked="" type="checkbox"/> Hart Testing	<a href="#">00947735e714bfe1e859f894ae5dd8cd.pdf</a>	Safe	10/30/2020 03:51AM HST



## Importing Insurance Information

- Click into **Payment Sources** to access the insurance information that was entered by the patient.
- The information will be displayed in the yellow box at the bottom of the page.
- Verify the accuracy of the information entered.
- If correct, click **Add Payment Source** and manually copy and paste this information into Optimis.
- Once the information has been entered click **Dismiss** to hide the portal information.

**Payment Sources** ?  
Create a Payment Source for each insurance plan that you will be adding to the patient's billing case within the Episode of Care

[+ Add Payment Source](#)

Payment Source	Type	Member #	Co-pay	Co-insurance %	Valid Dates	Visits Used	Actions
AARP Medicare Complete/UHC (Primary)	Medicare	N/A			N/A - N/A		<a href="#">Edit</a>   <a href="#">Print Benefits</a>   <a href="#">Delete</a>
Medicare Video	Medicare	N/A			N/A - N/A		<a href="#">Edit</a>   <a href="#">Print Benefits</a>   <a href="#">Delete</a>

**Insurances from Patient Portal (1)** Aetna - Primary Dismiss

**Aetna**  
Primary Insurance  
Member # Q408564952  
Group # 5987456  
Phone # 800-987-8585  
Address 1 7440 North Kendall Drive  
City Miami  
State FL  
Insured Is Patient  
Insurance Type Commercial - PPO

## Archiving Portal Information

- Once the information submitted by the patient has been reviewed and imported, you should **Archive** that submission
- Archiving allows you to keep the Patient Portal section organized.
- Go to **Patient Portal** → **Portal Updates Tab** → **Click Archive in the far right column** next to the submission you wish to archive.
- If you ever need to view an archived submission, use the filter in the **Portal Updates** tab and select **Show Archived Patients**.

[Portal Updates](#) [Invite Emails](#)

**Patient Updates**

Patient	MRN	Eval Clinic	Eval Date	Portal Updated At	Pulled At	Review	Archive
<a href="#">OME Testagain</a>	1000203088	Maui	10/21/2020	11/02/2020 11:21AM HST		<a href="#">Review</a>	<a href="#">Archive</a>
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	11/02/2020 09:41AM HST		<a href="#">Review</a>	<a href="#">Archive</a>
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	09/24/2020 06:23AM HST	04/20/2020 11:03AM HST	<a href="#">Review</a>	<a href="#">Archive</a>
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	06/01/2020 07:57PM HST	05/28/2020 06:20AM HST	<a href="#">Review</a>	<a href="#">Archive</a>
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	09/11/2019 09:51AM HST	09/11/2019 09:51AM HST	<a href="#">Review</a>	<a href="#">Archive</a>

## STEP 4: Monitor Patient Portal Activity

Patient Portal activity should be monitored at least once a day, but preferably more often. For best efficiency, this responsibility should be assigned to specific staff members.

Information reviewed should include:

- Verifying patient activation of portal accounts
- Monitoring any portal submissions

## Verify if Patient has activated their Portal Account

- Review the **Invite Emails** tab after clicking **Patient Portal** in the upper right corner of the Patient's tab.
- If the account has not yet been activated there will be no date and time stamp in the **Activated At** column.
- Reach out to the patient to remind them to activate the account prior to their visit.
- This should also be done when calling to confirm their appointment.

### Patients > Patient Portal - Invite Emails

Search for a patient by name or eval date (MM/DD/YYYY)...  ⓘ

**Filters**

Show Archived Patients  Sent  Viewed  Activated Clinic: Maui

Portal Updates **Invite Emails**

**Invite Emails**

Patient	MRN	Eval Clinic	Eval Date	Status	Last Sent	Viewed at	Activated at
<a href="#">OME_Testagain</a>	1000203088	Maui	10/21/2020	Activated	11/02/2020 11:18AM HST ⓘ	11/02/2020 11:44AM HST	10/06/2020 07:31PM HST
<a href="#">Sally_Staging</a>	1000203036	Maui	04/27/2020	Activated	10/30/2020 03:44AM HST ⓘ	11/03/2020 02:37AM HST	10/06/2020 10:27AM HST
<a href="#">Sally_Staging</a>	1000203036	Maui	04/27/2020	Sent	10/29/2020 07:46AM HST ⓘ		
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	Activated	10/12/2020 11:08AM HST ⓘ	10/12/2020 11:08AM HST	04/20/2020 06:26AM HST
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	Activated	04/21/2020 04:54AM HST ⓘ	05/05/2020 06:12AM HST	04/21/2020 04:55AM HST
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	Activated	09/11/2019 09:07AM HST ⓘ	09/11/2019 12:21PM HST	09/11/2019 09:12AM HST

- If needed, you can resend an activation email by going into the patient's demographic chart and clicking **Send Invitation to Patient Portal**.

### Patient Portal

## Verify if patient has updated their Portal Information

- This can be checked in the **Portal Updates** tab after clicking **Patient Portal**.
  - The **Portal Updated At** column will allow you to see the date and time the patient updated their portal information.
  - Click **Review** to view the updates and import into Optimis, if appropriate.



## Patients > Patient Portal - Patient Updates

Search for a patient by name or eval date (MM/DD/YYYY)...

### Filters

Show Archived Patients  Show No Eval Scheduled Patients Clinic:

Portal Updates

### Patient Updates

Patient	MRN	Eval Clinic	Eval Date	Portal Updated At	Pulled At	
<a href="#">CME Testagain</a>	1000203088	Maui	10/21/2020	11/02/2020 11:21AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sally Staging</a>	1000203036	Maui	04/27/2020	11/02/2020 09:41AM HST		<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Sue "Test1" Storm</a>	1000198391	Maui	05/04/2020	09/24/2020 08:23AM HST	04/20/2020 11:03AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Harto "Hart" Johnson</a>	1000201628	Maui	10/21/2020	06/01/2020 07:57PM HST	05/28/2020 06:20AM HST	<a href="#">Review</a> <a href="#">Archive</a>
<a href="#">Rachel Garcia</a>	1000000172	Maui	07/11/2016	09/11/2019 09:51AM HST	09/11/2019 09:51AM HST	<a href="#">Review</a> <a href="#">Archive</a>

➤ You can also check to see if the patient has submitted any data via the Portal by going to the **Demographics** page and looking under **Patient Portal**.

- If information has been submitted **Review Portal Data** will be visible and the **updated date and time stamp** will be listed below.
- If this is a new submission, click **Review Portal Data** to review the updates and import into Optimis, if appropriate.

### Patient Portal

Patient Portal Data Updated at 11/02/2020 09:41AM HST