

# Practice Partner Patient Portal Powered by Updox: Quick Start Guide

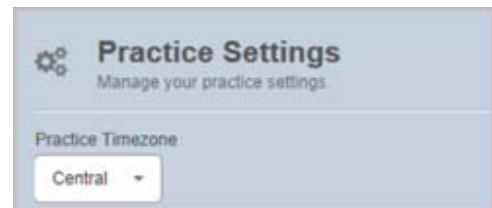
The purpose of this document is to provide instructions about configuring key aspects of the Updox Portal. For a more comprehensive guide, please refer to the *Updox Portal Admin Guide for eMDs Practice Partner* found on [eMDs Support Center](#). In addition, this document assumes you have the privileges to access the Portal Admin Console.

There are two ways to open the Updox Admin Console:

- Before migration has completed: Select Maintenance > Setup > **External Systems**. The External Systems screen appears. Select the **Updox Migration** option and click the **Edit** button. When the Updox Migration screen opens, click the **Portal Admin** button.
- After migration has completed: Select Maintenance > Setup > **Portal Admin**.

## Practice Settings

- **Practice Timezone** – Verify your time zone is set correctly.



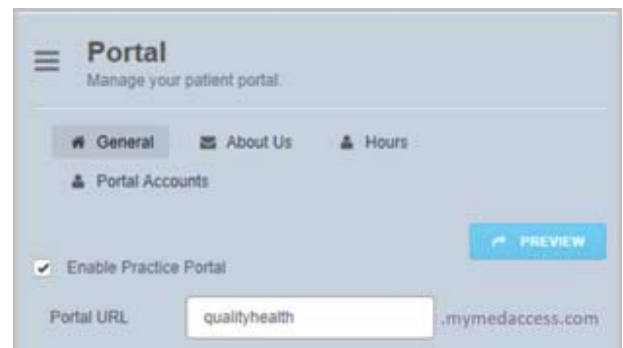
## Patient Portal

The Patient Portal tab contains many different configuration options that impact functionality available to the patient when they login to their portal. The About Us and Hours tabs will display information about the practice on the patient login page. Finally, the Portal Accounts tab contains preferences pertaining to registration emails and new message emails sent to patients.

### General tab

The General tab is where you enable your portal, define your logo, and configure preferences that impact patient functionality.

- **Enable Practice Portal** – Select this checkbox to activate the login page. The login page will not be accessible until this box is checked.
- **Portal URL** – The URL will default based on the value entered by the Portal Admin when they created the Updox account. It is strongly recommended that the URL is not updated once registration emails have been sent to patients.



- **Custom Logo** – Upload the logo that will display on the patient portal login page. Click Browse to find an image file, then click Upload Logo.

Note: If you don't have an image saved, but you have an existing web site with a logo, you can right-click and save the image to a local directory.



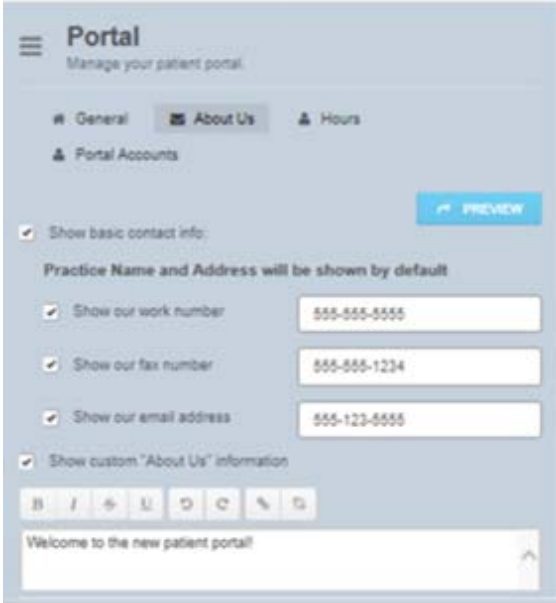
- **Name Displayed** – Input the name of the Practice to be displayed on the login page.
- **Enable "Messages Read" Notifications** – If you enable this feature, each time a patient reads a message, a read receipt will be sent to the Practice Inbox.
- **Allow patients to create new messages** – You must enable this option for patients to create new messages.
- **Allow patients to reply to messages** – You must enable this option for patients to reply to messages.
- **Allow patients to fill out forms** – You must enable this option if you want patients to have access to forms created by the Practice (clinic).
- **Allow patients to view records** – This option is selected by default. It allows patients to view their health/visit summaries on the portal.
- **Allow patients to send messages to multiple recipients** – Select this check box if you want to allow patients to select multiple recipients when composing a message. Please note that a separate message will be sent to each recipient.

- If you allow patients to create and/or reply to messages, then a list of Users will appear at the bottom of the current tab. Place a check next to each user and/or queue who can receive portal messages from patients.

**NOTE:** Users will not display until the Updox migration of operators has completed. If users (operators) are not listed, you must return to this step once the migration is complete.

### About Us tab

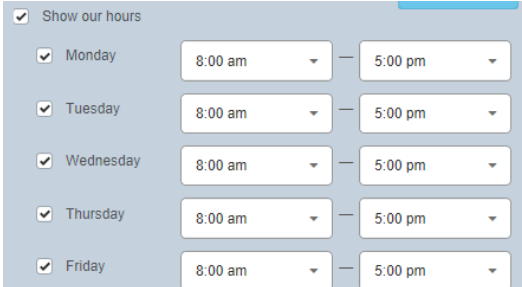
- **Show basic contact info** – Check this box so that the practice address displays on the login page.
- **Show our work number** – Enter the work number that will display on the login page. You must check the box for the number to display.
- **Show our fax number** – Enter the fax number that will display on the login page. You must check the box for the number to display.
- **Show our email address** – Enter the email address that will display on the login page. You must check the box for the email to display.
- **Show custom “About Us” information** – Check the box and enter a message in the free text field that will display on the login page.



The screenshot shows the 'About Us' tab in a patient portal management interface. The page title is 'Portal' with the subtitle 'Manage your patient portal'. There are three tabs: 'General', 'About Us' (selected), and 'Hours'. Below the tabs is a 'Portal Accounts' section. A 'PREVIEW' button is visible. The 'Show basic contact info' checkbox is checked. Below it, a note states 'Practice Name and Address will be shown by default'. There are three input fields: 'Show our work number' with the value '555-555-5555', 'Show our fax number' with the value '555-555-1234', and 'Show our email address' with the value '555-123-5555'. The 'Show custom "About Us" information' checkbox is also checked. Below this is a rich text editor with a toolbar and a text area containing the message 'Welcome to the new patient portal!'.

### Hours tab

- Define the hours of operation to be displayed on the login page. If you choose to display office hours, you must check the 'Show our hours' box, as well as check the box next to each day you want to display.

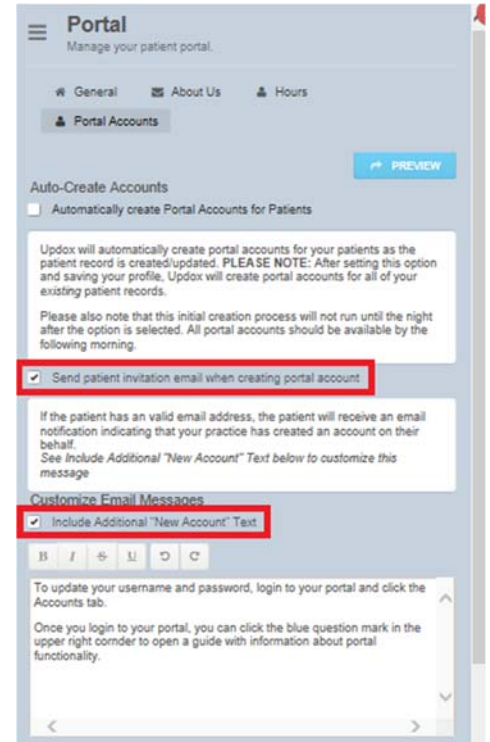


The screenshot shows the 'Hours' tab in the patient portal management interface. The 'Show our hours' checkbox is checked. Below it are five rows for days of the week: Monday, Tuesday, Wednesday, Thursday, and Friday. Each row has a checked checkbox and two time selection dropdowns. For all days, the start time is '8:00 am' and the end time is '5:00 pm'.

### Portal Accounts tab

The purpose of this tab is to allow customization and sending of portal registration emails.

- **Send patient invitation email when creating portal account** – Check this box to ensure your patients receive emails when creating their portal accounts.
- **Include Additional “New Account” Text** – Check this box to add additional information to the patient registration emails.  
**Note:** Consider adding the following information to your registration emails:
  - Once you login to the new portal, you can update your username by clicking the Account tab.
  - Additional information about how to use the new portal can be found by logging into your account and clicking the blue question mark in the top right corner.



### Scheduling

Selecting the Scheduling tab will open another browser window with scheduling options. After completing configuration on this screen, you must scroll to the bottom and click Save.

- **Time Zone** – Select the correct time zone so that appointment scheduling and appointment reminders (optional) function as expected.
- **Allow patients to request an appointment on waiting list** – Check this box if you want to allow patients to send appointment requests that will appear on the Wait List Maintenance screen in Scheduling.
- **Patients can schedule appointments from portal** – Not applicable for this integration.
- **Instructions** – Not applicable for this integration.

