

WHAT'S

NEW

in



Your Hosts



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Director of Regulatory
& Clinical Affairs



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Product Manager -
Clinical

Quick Housekeeping



All attendees will be muted during this webinar. If you have a question, please drop it into the Questions box of your GoToWebinar panel.

You will receive a recording of this webinar in your email.

Agenda



Today, we'll be covering:

- Patient Check-In
- Self-Scheduling
- OP Patient Portal Expansion
- OP Patient Portal Mobile App
- Opie AI™ Improvements
- Q&A



Poll Question



How many different forms do you have as part of your patient check-in library?

- A. Less than 10
- B. 11-20
- C. 20+

Poll Question



How do you manage patient/parent signatures on forms today?

- A. They sign the form at the front desk, then we scan them.
- B. We send forms via the portal, then we scan them on arrival.
- C. A 3rd party collects signatures, and come digitized to us.

Patient Check-In



How will Check-In help my practice?

Save ~14 minutes per patient

Decrease time in waiting room

Accurate data records

Increase parent/guardian
satisfaction

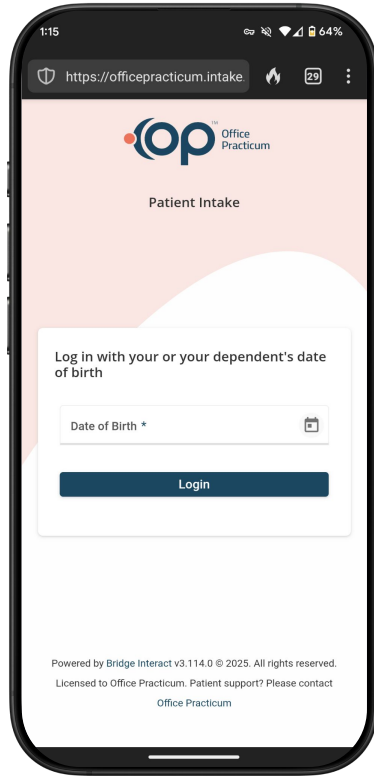
Reduce burden on the front
office staff

Increase collection rates

Check-In Features

- ✓ Check-In links are automatically sent as part of PMX+.
- ✓ Parents can review and update patient demographic data like address and phone number.
- ✓ Parents can review insurance data and upload insurance card.
- ✓ Payments can be made on patient/family balances; must be integrated with InstaMed.
- ✓ Data is automatically updated in OP.
- ✓ A PDF of the Check-In Summary is automatically uploaded to the patient's Documents.
- ✓ Check-In status is updated in OP: Appointment window + Calendar → Tracking.

Check-In Screenshots



1:15 https://officepracticum.intake

op Office Practicum

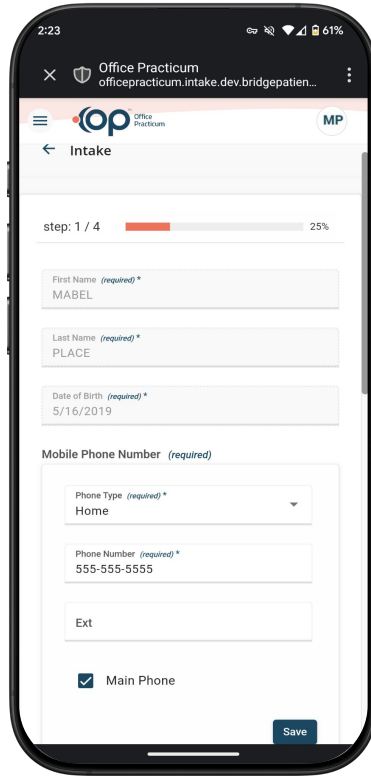
Patient Intake

Log in with your or your dependent's date of birth

Date of Birth *

Login

Powered by Bridge Interact v3.114.0 © 2025. All rights reserved.
Licensed to Office Practicum. Patient support? Please contact
Office Practicum



2:23 Office Practicum
officepracticum.intake.dev.bridgepatien...

op Office Practicum MP

← Intake

step: 1 / 4 25%

First Name (required) *
MABEL

Last Name (required) *
PLACE

Date of Birth (required) *
5/16/2019

Mobile Phone Number (required)

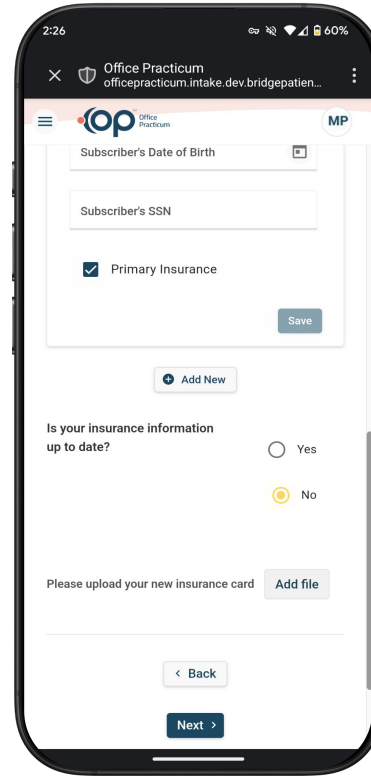
Phone Type (required) *
Home

Phone Number (required) *
555-555-5555

Ext

☒ Main Phone

Save



2:26 Office Practicum
officepracticum.intake.dev.bridgepatien...

op Office Practicum MP

← Intake

Subscriber's Date of Birth

Subscriber's SSN

☒ Primary Insurance

Save

+ Add New

Is your insurance information up to date?

☐ Yes

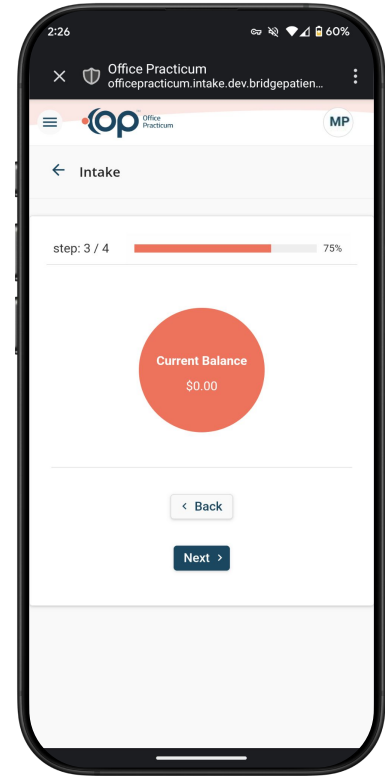
☒ No

Please upload your new insurance card

Add file

< Back

Next >



2:26 Office Practicum
officepracticum.intake.dev.bridgepatien...

op Office Practicum MP

← Intake

step: 3 / 4 75%

Current Balance
\$0.00

< Back

Next >

Check-In: Forms & Surveys



Forms Features

- Additional add-on
- 11 default forms to start
- Ability to assign ad-hoc to a patient's check-in
- Fillable and signable
- Automatically uploaded to Patient Documents
- Custom form creation under development and planned for a future release



Surveys Features

- No Portal, No Problems
- Sent via PMX+
- Send OP and CHADIS Surveys
- Messages will be sent via Text or Email
- Customize your email message
- Harmonized with all the Patient Engagement solutions available today & Future





**DEMO
TIME**

Appointment Confirmation

Appointment Confirmation Details



Inbox x



noreply@op.health

to PCHAPMAN+CHECK ▾

1:27 PM (3 minutes ago)



Hello,

Thank you for confirming AIDEN's appointment! Please go to <https://op.health/xe1nh> to complete additional patient information. This will decrease the paperwork required in the office.

Appointment Details: Training Better training drive, Fort Washington, PA, 19034 on Wednesday, Jun 11 at 2:15 PM with CORA L NOEL MD

Need to reschedule? Please contact the office at (800) 218-9916.

We look forward to seeing you soon!

Training Better

If you would prefer not to receive further messages from this sender please follow the link and confirm your request. <https://pmx.op.healthcare/unsubscribe?id=68486b0c07c9285ec03d2b96&email=PCHAPMAN%2BCHECK%40OFFICEPRACTICUM.COM>

Self-Scheduling



Poll Question



If you plan on using Self-Scheduling, what type of appointments do you plan to use it for?

- A. Flu clinic appointments
- B. Sick visits
- C. Well visits
- D. All of the above
- E. I don't plan on using Self-Scheduling

Poll Question



What is your biggest concern about using a Self-Scheduling tool?

- A. People book the wrong appointment type
- B. Setup time/ Admin time
- C. Self-scheduling just stops working
- D. Staff or providers resist making the change
- E. I have no concerns



OP Self-Scheduling Features

- Flu Clinic , Sick Visits and Well Visits will be available!
 - Watch for Promotion, coming soon. Check your email for details.
- Appointments will be integrated with the OP Calendar
- One-time setup
- Integrates with PMX+, Check-In, Surveys (OP and CHADIS)
- Optional feature (practice can decide if they want to make available and for which appointment types)



OP Self-Scheduling Features

Configurable

- Dictate how far out someone can schedule
- Limit timing between appointments
- Which providers can be selected (All providers, providers seen within the last year)


Patient/Parent/Guardian ability to:

- Book Flu/Sick/Well Appointments whenever convenient for them
- Select Provider, Location, Date, Time, Next Available
- Add Comments/Details

Why is it better than the legacy portal?

| | OP Self-Scheduling | Legacy |
|--------------------------|---|---|
| Setup Time | 20-30 MINUTES | 2-8 HOURS |
| Types of Visits | Well, Sick, Flu | Well, Sick, Flu |
| Multi-Patient Scheduling | Yes | No |
| Appointment | Template Driven, Appointment driven in the future | Template Driven |
| Appointment Reason | Added to the Appointment Text when Appointment is created | Comes in as a Message assigned to a message group |
| One Time Setup | Yes | Maybe |

Appointment Request (Current Functionality)



43

Admin, OP as:
BRIDGE, DAD

Home

Appointments

Billing

Messages

Medical Records

Prescriptions

Results

Forms

Education

Support

Appointments

Filters

Order By
Order Type
Ascending

If you need an appointment in the next 24hrs, please call us at 1(000) 231-1234.

Bridge, Joe - 1995-05-03

TeleHealth Visit 02/16/2024 - 03:30 pm

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Scheduled

Bridge, Joe - 1995-05-03

Office Visit 01/07/2024 - 09:00 pm

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Cancelled

Bridge, Joe - 1995-05-03

Office Visit 08/03/2023 - 01:00 pm

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Completed

Bridge, Joe - 1995-05-03

Telemedicine 06/22/2022 - 06:30 am

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Completed

Bridge, Joe - 1995-05-03

Office Visit 05/05/2022 - 02:00 pm

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Completed

Bridge, Joe - 1995-05-03

Follow Up Visit 02/23/2021 - 05:00 am

PROVIDER: Dr. Bridge, Doctor LOCATION: Best Practices Main

Completed

New Appointment

Patient (required) *
Bridge, Joe (1995-05-03)

Patient Phone (required) *
3024336108

No Preference

Provider (required) *
Dr. Bridge, Doctor

Location (required) *
Best Practices Main

Reason for visit (required) *
Sick Visit

Comments
The mornings from 10-12 typically.....

Request your Appointment

Please indicate your availability

Preferred Date Range *
2/16/2024 - 3/1/2024

| | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. |
|----|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| AM | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| PM | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | - |

Submit



**DEMO
TIME**

[COMMUNICATION](#)
[Calendar](#)
[Tracking](#)
[Print](#)
[Staff](#)
[Room](#)
[Appts](#)
[Slots](#)

- Claims (12)
- Superbills (55)
- Rejections (4)
- Queue (64)
- Remits
- Not Ack (9)

(none) ▼ 1 7

◀ June 2025 ▶

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 1 | 2 | 3 | 4 | 5 |

Today: 6/10/2025

Appt. Date: 06/12/2025
 5 min. Start : 09:00 AM
 End : 09:05 AM

Thursday June 12, 2025 Week# 24

OP Patient Portal Expansion



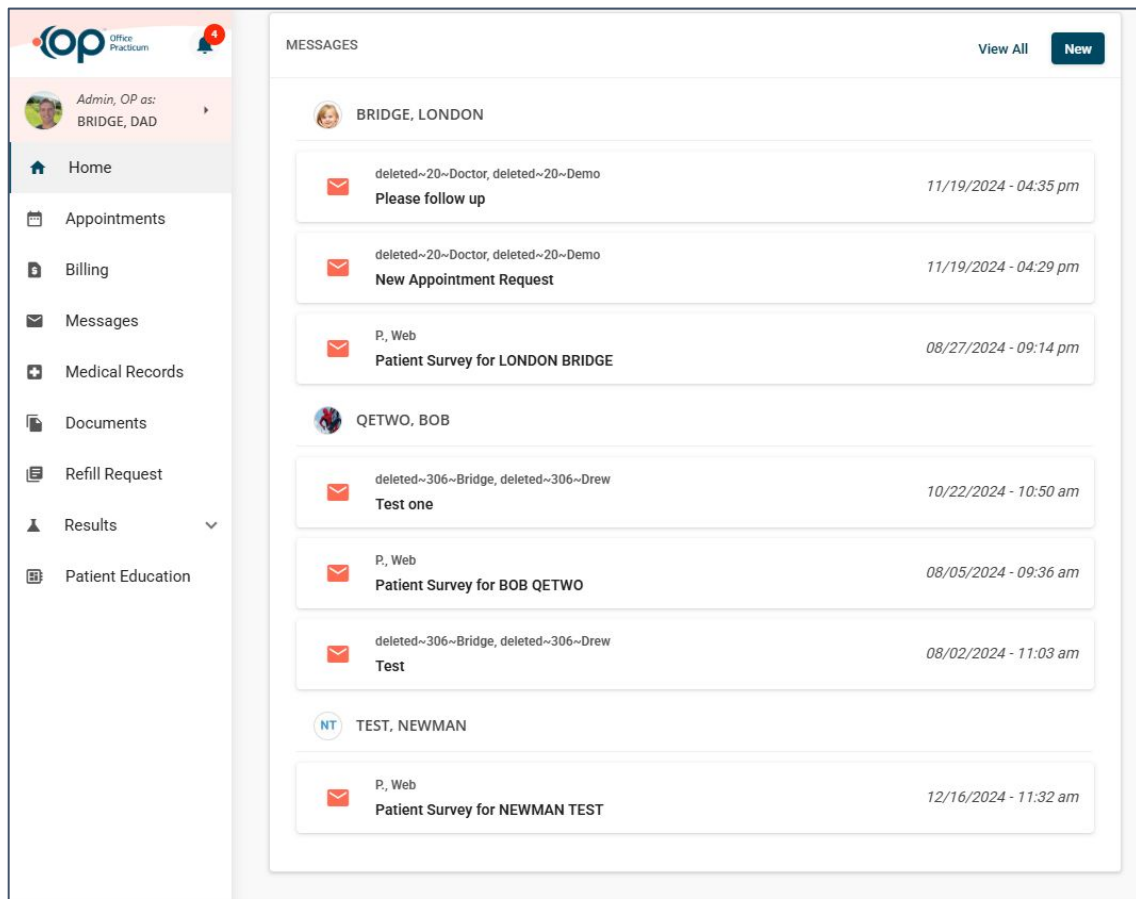
Administrative

The screenshot displays the Office Practicum administrative dashboard. On the left is a sidebar with navigation links: Admin, OP, Home, Reports, Marketing, Create Campaign, Campaigns, and Settings. The main area features a filter bar with options like 'In Portal', 'Upload CSV', and various demographic filters (Gender, Age, Conditions, Medication, Allergy, Appt Type, Appt Status, Appt From, Appt Until). A dropdown menu is open under 'User Logged', showing options: '- Unselect', 'Users who have logged in for the first time', 'Users who have logged in within a date range', 'Users who have never logged in' (which is selected with a checkmark), and 'Users who have not logged in within a date range'. A 'Create Campaign' modal is open on the right, showing that 6 users were selected. The modal includes radio buttons for 'In Portal', 'Custom', and 'Notification' (which is selected). It also has a 'Notification type' dropdown set to 'Welcome To Office Practicum', 'Settings' for 'Scheduled Date' (4/17/2025), 'Scheduled Time' (10:00 AM), and 'Repeat Every' (30 Days). An email field contains 'pchapman@officepracticum.com' and a 'Send' button is at the bottom.

- Marketing campaigns
- Enhanced Reporting & New Engagement Dashboard

Parent Portal View and Satisfaction

- Enhanced Widget content
- Changed patient email extension from @dummy.com to @noreply.com
- Age of Majority
 - Global Preference
 - Access
 - None
 - Minor
 - Full

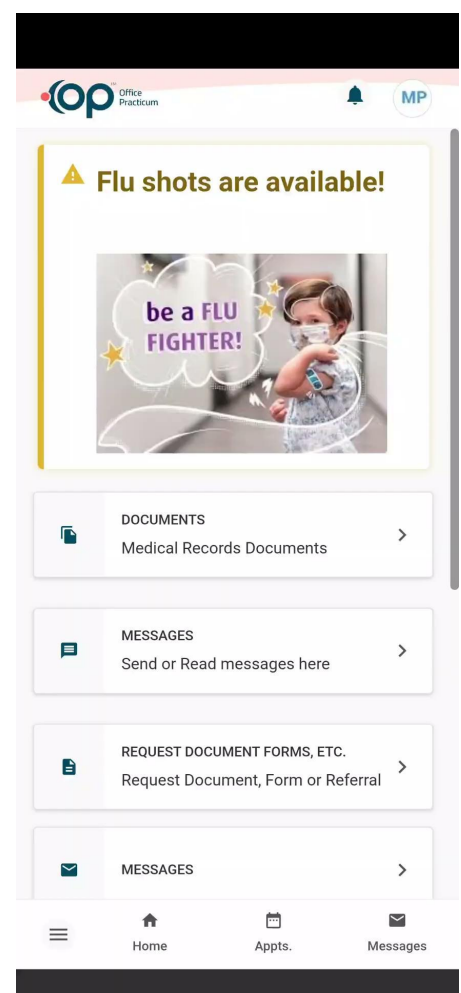
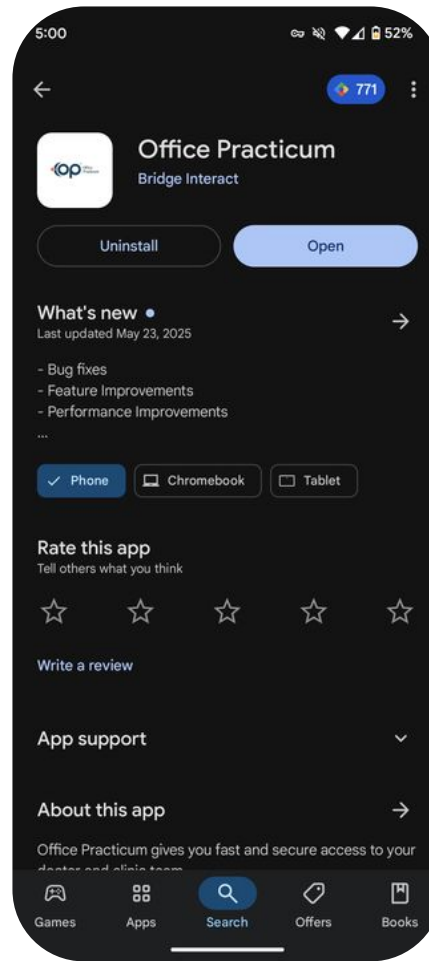


OP Patient Portal Mobile App



Portal Mobile App

- Downloadable App
 - Apple or Google Play (preview available today)
 - Parent/Guardian will select your office and login with their credentials
 - Branded for your office upon login
- Puts the Portal in your pocket
- Empowers parents by allowing access to critical information about their child



Opie AI™



Opie AI™ Improvements



Spanish translation



Addition of infant formula list



Template updates:

- Improved placement of information in correct section
- Mental health info going to Counseling

Coming Next

Integration into OP!

Onboarding and Training



How do I get all this cool stuff?

Let us know which products you're interested in learning more about or getting started with right away by scanning the QR code to fill out [this brief form](#). Your CSM or SAM will follow up with details tailored to your setup and needs.



Learn how to use Self-Scheduling and Check-In in our upcoming training webinars:

Self-Scheduling Webinar Schedule

- [Wednesday, July 2nd at 3 PM ET](#)
- [Tuesday, July 8th at 10 AM ET](#)
- [Thursday, July 17th at 10 AM ET](#)

Check-In Webinar Schedule

- [Thursday, July 3rd at 10 AM ET](#)
- [Friday, July 11th at 1 PM ET](#)
- [Tuesday, July 15th at 3PM ET](#)

OP Help Center Resources



- [OP Portal](#)
- [Webinar Recording: Meet Opie, OP's New AI Assistant](#)
- [Pilot: PMX+ with Check In Overview](#)
- [Coming Soon: PMX+ Check-In Workflow](#)

Lock in 2025's
pricing when you
register by
June 30!



USER CONFERENCE

Boot Camp April 25 | Conference April 26-28
Caribe Royale, Orlando

*Super Early Bird
Now Open!*

Conference \$1,199
Boot Camp starting at \$499



Upcoming Webinar

The OP Portal: Real Feedback, Fresh Features, and Future Plans



Thursday, July 10 |



12 PM ET

Featuring:



Pamela Chapman
Director of Regulatory
& Clinical Affairs



Kateri Haskett
CEO, Pediatric Associates
of Northern KY

[Register now!](#)

Questions?





Thank you for coming!
Please complete the survey following the
conclusion of the webinar.