S – PORTAL SETUP AND CUSTOMIZATION

Here's how the services manager sets up the Portal.

After logging in, the services manager clicks "Dashboard" at the top right of the screen and then clicks "Settings" in the top menu bar. The office name, email, contact name and phone number must be filled in. Below, the services manager fills out customizable fields that include specific instructions for referring HCPs. The "Canned Replies" field is customizable. Facility secretaries and technicians can select these time-saving, pre-created replies from a dropdown when posting within a Portal thread.

Next, the services manager clicks "Add New User/Test Proc." in the top menu. Here secretaries may be added. Existing secretaries can be deleted, should they leave the practice. Multiple tests/procedures that are offered at this facility location can be added and individually named.

In the "Assign Test/Procedure" area, the services manager lists all of the secretaries associated with each test/procedure, identifying one key secretary for each test/procedure and Saves all changes.

This is how simple it is to set up a Consult*STAT*-Services Portal.