

Review and Share Documents from a Visit Note

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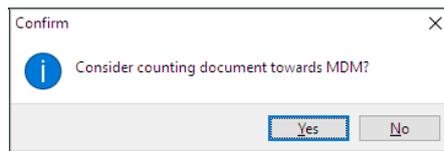
Version 20.13

About

To streamline workflow, documents may be shared to the Patient Portal and/or reviewed within a Visit Note. It is important to note when marking a document reviewed or sharing to the Patient Portal, the action must be complete on the date of the visit. If either of these actions occurs on a date different than the date of the visit, they will not appear on the Summary.

Mark a Document as Reviewed

1. Within an Encounter or Well Visit Note, click **Documents**.
2. From the Documents Panel, click to select a document.
3. Click the **Mark Reviewed** button.
4. The Confirmation window displays; click **Yes** to mark the document reviewed.
5. A confirmation window displays, click **Yes** to count the document towards MDM or **No** if the document should not be counted towards MDM. **This step is only relevant for Encounter Visit Notes**



Note: When a document is marked as reviewed, a DOCUMENTS heading is added to the Summary and all documents reviewed will be listed.



DOCUMENTS:
Documents Reviewed Today
:DIAGNOSTIC TEST:Lab Order - 05/07/2020 11:53 AM

Share a Document to the Patient Portal

1. Within an Encounter or Well Visit Note, click **Documents**.
2. From the Documents Panel, click to select a document.
3. Click the **Edit** button.
4. In the Document Detail Panel, click the **Shared To Portal** checkbox.
5. Click into the **Portal Exp Date** field, confirm the date the document will expire on the Patient Portal.
6. Click the **Save** button.

Note: When a document is marked to share to the portal, within the DOCUMENTS heading of the Summary, and documents shared will be listed.



Documents Shared
:DIAGNOSTIC TEST:Lab Order - 05/07/2020 11:53 AM