Printing Medical Records

Last Modified on 12/28/2022 8:43 am EST
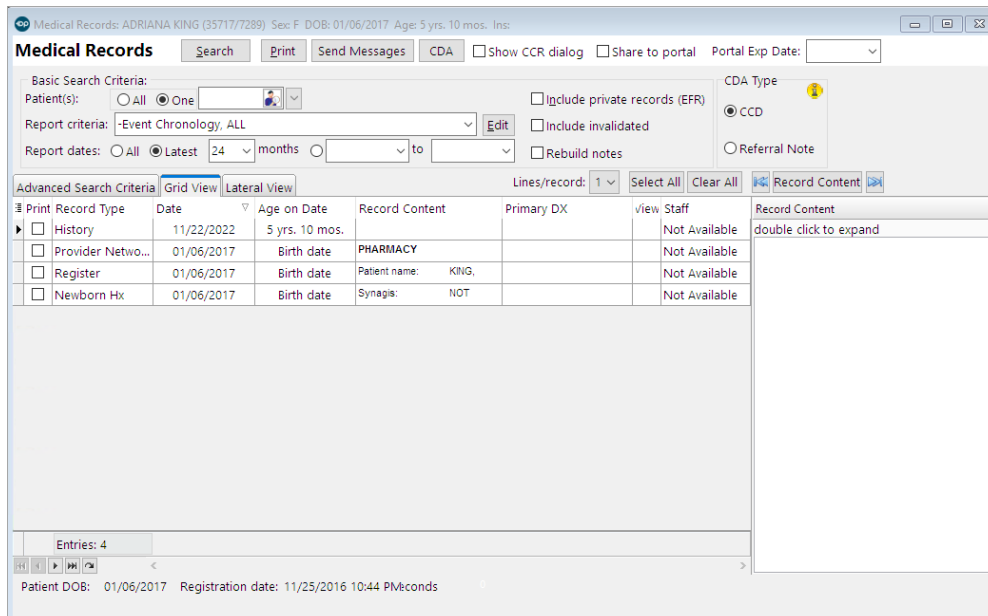
Version 21.0

Path: Clinical tab > Medical Records button

Prior to printing from the Medical Records window, you may find it useful to filter the data in the grid. You can print all entries in the Medical Records window or select specific entries to be printed.

Selecting a Report and Printing All Entries

1. Navigate to Medical Records by following the above path.
2. Search for and select a patient in the Patient(s): field.
3. Click the drop-down and select a report in the Report criteria field.
4. Report dates will be selected by the default of the selected report.
5. Click the Search button to create the report.

6. To print all entries, click the Select All button.
7. Click the Print button.

Printing Specific Entries

1. To print only specific entries (e.g., prescriptions or encounter notes), select the checkboxes in the Print column next to those entries you would like to print.
2. Click the Print button.

> ★ **Example**: You want to generate a printout of all blood pressure entries for a patient.
> 1. Hover over the **Record Type** column.
> 2. Click the **Filter** button.
> 3. Select **Vital Signs**.
> 4. Select the checkbox(es) for all lines where the Record Content shows Blood Pressure.
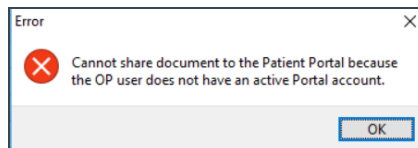> 5. Click the **Print** button.

> 📌 **Notes**:
> - Only scanned document types that were selected to be included in the Medical Records reports are available to view or print. Click **here** for additional information on how to select document types.
> - Any scanned items print separately, following the completion of printing the other documents.
> - The growth chart and immunization history are included in the Event Chronology, but they are listed as text, not graphs. If you wish to print these items in their proper formatting, you must open and print them separately.

Sending Documents to the Patient Portal

When sending documents to the Patient Portal, the logged-in OP user must have an active portal account. If the OP user does not have a portal account the below message is displayed.

1. Navigate to Medical Records using the above path.
2. Search for and select a patient in the **Patient(s):** field.
3. Click the drop-down and select a report in the **Report criteria** field.
4. Report dates will be selected by the default of the selected report.
5. Click the **Search** button to create the report.
6. Select the checkboxes for documents to send to the Patient Portal.
7. Click the **Share to portal** checkbox.
8. Click the drop-down and select from the calendar or enter an expiration date in the **Portal Exp Date** field.

> 📌 **Note**: The **Portal Exp Date** field populates with the Default Document Expiration Date set in the Portal tab of System Preferences.

9. Click the **Print** button to send the document(s) to the Patient Portal. If you will not print the document(s), close the print window.
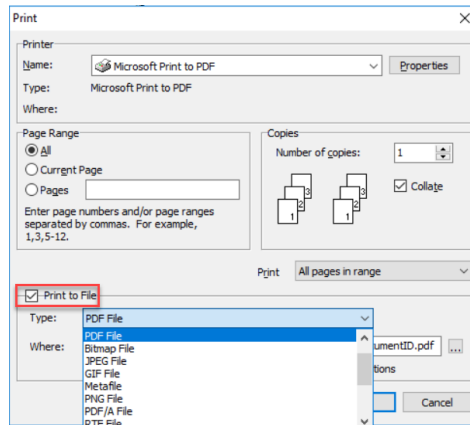
> **FAQ**
> *"When selecting multiple documents, how will they appear on the Patient Portal?"*
> When you select more than 1 document, each will appear as it's own document on the Patient Portal.

Saving to Disc

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5. Click the **Search** button to create the report.
6. To select all entries, click the **Select All** button.
7. Click the **Print** button.
8. In the Print window, select the **Print to File** checkbox.
9. Select **PDF File** from the Type drop-down.

10. Click the **Ellipses** button and select a location to save the file, click the **OK** button.
11. Complete the information in the Medical Record Disclosure Tracking window, and click the **OK** button.
12. Insert a blank CD-R disc or zip drive and copy the PDF file onto the disc or drive. This can be given to the patient a digital copy of their medical records.

> **Note**: If the **Print to File** checkbox is not available, you can download and install a PDF printer. Two printers that have been tested are Bullzip and CutePDF. This allows you to create a PDF of the chart and save to your computer much like the Print to File option. Once you have created the PDF, it can be copied to a disc, thumb drive, etc. For the best way to encrypt files saved to a disc, consult your IT professional.
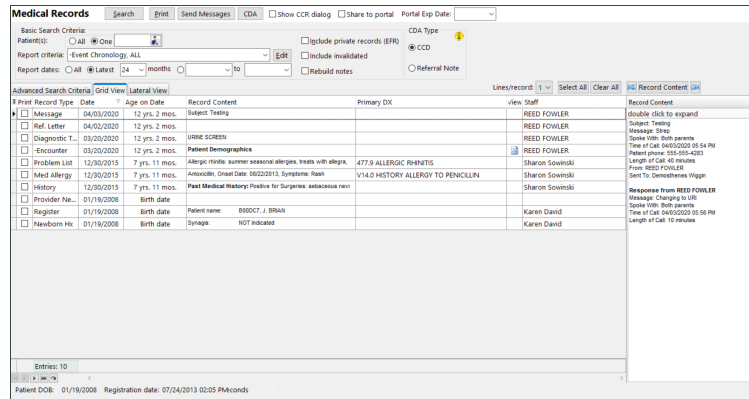
Version 20.18

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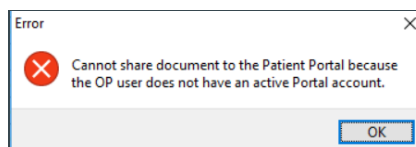> 5. Click the **Print** button.

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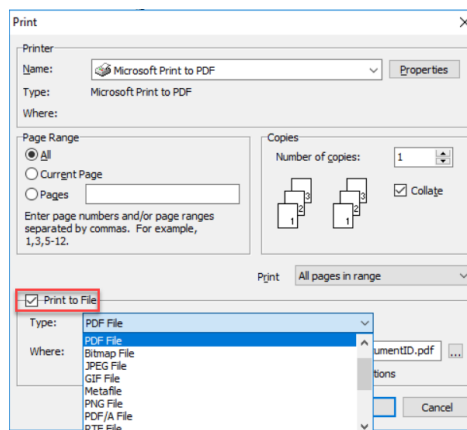
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