

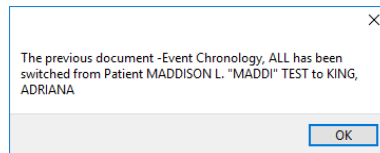
# How do I move a document to another patient?

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The method for moving a Document from one patient to another depends on whether or not the Document was shared to the IntelliChart Portal. Moving and deleting Documents is recorded in the Audit Trail.

## To move a scanned document that **has not** been shared to the Patient Portal (IntelliChart) to another patient:

1. Navigate to and select the document in the patient's chart that has to be moved to another patient.
2. Click the **Edit** button located in the toolbar.
3. Click in the **Patient ID** field to search for and select the patient to which the document should be moved.
4. Click the **Save** button.
5. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.
6. In the Audit Trail window, select or enter a reason for the change.
7. Click **OK** in the confirmation window.



## To move a scanned document that **has** been shared to the Patient Portal (IntelliChart):

**Warning:** This workflow involves the deletion of the Document. It is recommended to make sure you have either the original Document or a saved copy that you can import into the correct patient's chart before deleting it. Use the **Save a Copy** or **Print** button displayed when hovering over the Document to ensure you have a copy of the original.



1. Navigate to and select the document in the patient's chart that has to be moved to another patient.
2. Click the **Delete** button.
3. Click **YES** to confirm you want to proceed by deleting the Document.
4. In the Audit Trail window, select or enter a reason for the deletion.
5. Click in the **Patient ID** field to search for and select the patient to which the document should be moved.
6. Click the **Save** button.
7. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.