

Print or Send a Patient Exit Note to the Portal

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Version 20.7

Overview

Patient Exit Notes (both unfinalized and finalized) can be printed or sent to the portal. Depending on the finalization status of the Note, the steps are slightly different.

Print the Patient Exit Note

If the Note is Finalized:	If the Note is Unfinalized:
<ol style="list-style-type: none"> 1. Navigate to and select the Encounter or Well Visit in the Patient Chart. 2. Click the Open Note button. 3. Select the Patient Exit Note tab. 4. Click the Print Note button to print or preview the note. 5. Complete the Medical Record Disclosure Tracking window. 	<ol style="list-style-type: none"> 1. Navigate to and select the Encounter or Well Visit in the Patient Chart. 2. Click the Open Note button. 3. Click Summary in the window navigation panel. 4. Select the Patient Exit Note tab. 5. Click the Rebuild Summary button. 6. Click the Print Note button to print or preview the note. 7. Complete the Medical Record Disclosure Tracking window.

Send the Patient Exit Note to the Portal



Portal Note: This process saves the Patient Exit Note as a PDF and sends it to the portal as a **Document to Review**, which is accessed by the parent/patient in the Documents section of My Chart. Remember, the parent must be viewing the *patient's* portal, not their own, to see the correct chart information. As a reminder, both the OP use and the patient require an active portal account for the document to be successfully sent to the portal.

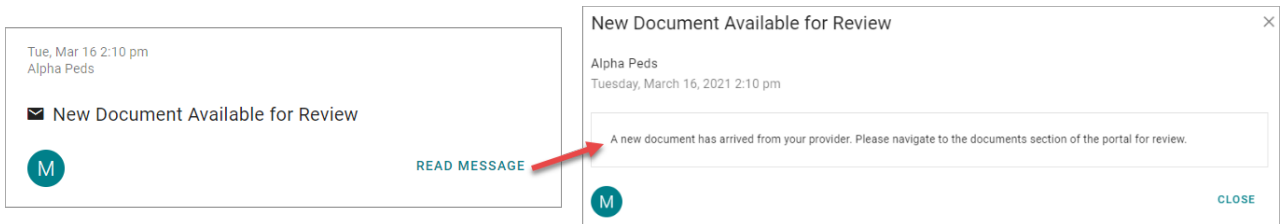
Step 1: Save the Patient Exit Note as a PDF

If the Note is Finalized:	If the Note is Unfinalized:
<ol style="list-style-type: none"> 1. Navigate to and select the Encounter or Well Visit in the Patient Chart. 2. Click the Open Note button. 3. Select the Patient Exit Note tab. 4. Click the Print Note button. 5. In the Print Preview window, click the printer icon and select the Print to PDF print option. 6. Click OK. 7. Select a secure destination to save the PDF, and click Save. 8. Close the Print Preview window. 9. Complete the Medical Record Disclosure Tracking window. 10. Close the Encounter Summary Sheet. 	<ol style="list-style-type: none"> 1. Navigate to and select the Encounter or Well Visit in the Patient Chart. 2. Click the Open Note button. 3. Click Summary in the window navigation panel. 4. Select the Patient Exit Note tab. 5. Click the Rebuild Summary button. 6. Click the Print Note button. 7. In the Print Preview window, click the printer icon and select the Print to PDF print option. 8. Click OK. 9. Select a secure destination to save the PDF, and click Save. 10. Close the Print Preview window. 11. Complete the Medical Record Disclosure Tracking window.

Step 2: Send the PDF to the Portal

After completing Step 1, above, to save the Patient Exit Note as a PDF, proceed to:

1. Navigate to the **Documents** section on the Patient Chart.
2. Expand **Item Type: Disclosures** on the left side of the window to locate and select the Encounter Details record with the current date. You can also filter the list to only show Shared to portal = False to see all that has not been shared to the portal.
3. Click **Share to Portal**. The Shared to Portal checkbox located in the Review Details on the right side of the window is updated to be checked.
4. Click Save. The PDF of the Patient Exit Note is sent to the portal.



The parent/patient will then ensure they are viewing the *patient's* portal, select **My Chart** in the portal navigation menu and select **Documents**. The Patient Exit Note is listed in the **Encounter Notes** section of the window. When they click the **Encounter Details** link, the Note is downloaded as a PDF.

Encounter Notes		
Encounter Date	Name	Practice
3/16/21 2:10 PM	Encounter Details	Alpha Peds