

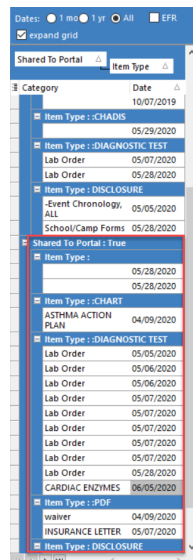
### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

# How do I label and share a scanned document to the Patient Portal?

Last Modified on 06/26/2020 3:03 pm EDT

The Item Type and Item Category selected should be appropriate to the document that is scanned. In order to share a scanned document to the IntelliChart Patient Portal, the **Shared To Portal** checkbox must be selected and the Privacy Level must be set to **Any Staff Member**. The expiration date may be left blank or a date can be entered. If the practice has set the number of default days, in the Portal tab of System Preference, once saved the date will populate. When **saved**, the document is displayed in the **Shared to Portal : True** group but is still associated to the selected Item type and category.



Category	Date	Item Type	Shared To Portal
Item Type : CHADIS	05/29/2020		
Item Type : DIAGNOSTIC TEST	05/07/2020		
Lab Order	05/28/2020		
Item Type : DISCLOSURE	05/05/2020		
Event Chronology	05/05/2020		
School/Camp Forms	05/28/2020		
<b>Shared To Portal: True</b>			
Item Type :	05/28/2020		
Item Type :	05/28/2020		
Item Type : CHART	04/09/2020		
ASTHMA ACTION PLAN			
Item Type : DIAGNOSTIC TEST			
Lab Order	05/05/2020		
Lab Order	05/06/2020		
Lab Order	05/06/2020		
Lab Order	05/07/2020		
Lab Order	05/07/2020		
Lab Order	05/07/2020		
Lab Order	05/07/2020		
Lab Order	05/07/2020		
Lab Order	05/07/2020		
Lab Order	05/28/2020		
CARDIAC ENZYMES	06/05/2020		
Item Type : PDF			
walver	04/09/2020		
INSURANCE LETTER	05/07/2020		
Item Type : DISCLOSURE			



**Attention:** For clients that used the former portal, saving documents to the Forms Item type is no longer required to send a document to the IntelliChart Patient Portal.