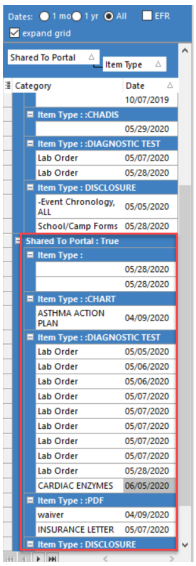
Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

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 InteliChart 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.



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 InteliChart Patient Portal.