

# Patient Portal: Clinical Summary

A quick reference guide  
for parents

The Clinical Summary is a combination of chart information and Encounter-specific information. Remember, this is **personal health information** and should be protected as such.

## Access and View Clinical Summary

## Other Clinical Summary Options

- 1 After logging in, select the toggle button for the patient to access their information.
- 2 Expand **My Chart** in the navigation panel and choose **Visits**.
- 3 Click the **Details** button for the visit that you want to view the Clinical Summary for.
- 4 Select Clinical Summary from the **Clinical Document** drop-down, and click **Create Clinical Document**.

Clinical Document

Clinical Summary

CREATE CLINICAL DOCUMENT

You'll see the Clinical Document on the left-side of the window, where you can scroll down and use the Table of Contents to jump to specific sections of the document, like Immunizations (which is Chart info) or Instructions or Encounters (which are visit-specific)

### Send via Email

Send via unsecure or secure email. It is recommend to only transmit personal health information in a **secure** way. After selecting the radio button for the method you choose to use, enter the recipient's email address, and click **Send Clinical Document**.

### Download

Download the Clinical Summary as a secure zip file to your computer.

### Print

Print the Clinical Summary and securely store it.

#### Send Via

Email Address

Regular email is an **unsecure** way of sending your Personal Health Information. If you would like to send your Personal Health Information to your healthcare provider securely please ask for their Direct Trust Email Address and select the option below.

Direct Trust Email

Enables you to send your Personal Health information to providers, hospitals, and other partners **securely**. Contact your healthcare provider for their Direct Trust Email Address.

Enter Recipient's Email Address

SEND CLINICAL DOCUMENT

DOWNLOAD

PRINT

If you have any questions about your patient records, please contact the practice.