

## March 19, 2021 Portal Tips & Tricks

### *Don't Delete Survey Tasks*

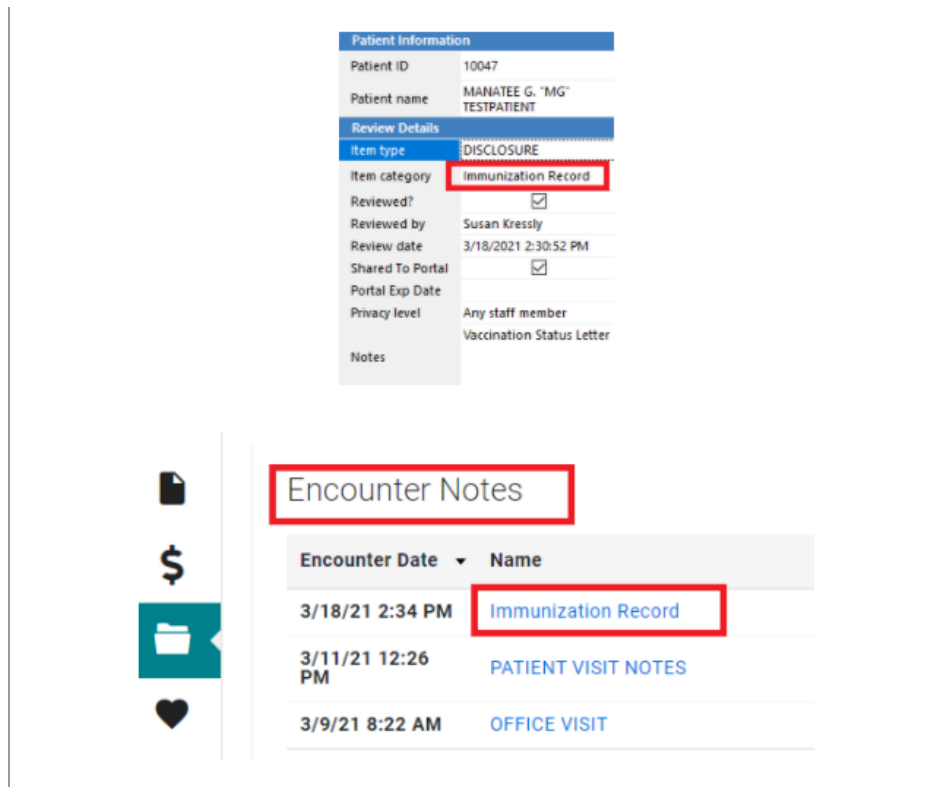
Survey results are linked to the task order when they return to OP. We have learned that staff may be inadvertently removing a task that is associated with a survey, and once deleted, the result cannot be matched or linked. This makes the result not available to the practice. Tasks for surveys should not be deleted from OP even when it appears as a duplicate. Instead, practice teams should mark the status as n/a.

### *Avoid Duplicate Surveys and Tasks*

In order to avoid duplicate surveys and tasks, when rescheduling any appointments with associated tasks, move the original appointment to the new appointment time. If you create a new appointment, duplicate surveys (and messages to patients), as well as tasks, will be created. (This includes no-shows and cancellations that you intend to reschedule at a later date).

### *Make it Easier for Families to Find Portal Documents*

InteliChart's document section includes generated CDAs (clinical documents). The documents you share to the portal will be in the encounter section. To make it easier for parents to understand what you have shared, your practice should be completing the "Item Category" of an item with meaningful information.



The screenshot displays the InteliChart portal interface. At the top, a 'Patient Information' section shows details for Patient ID 10047, Patient name MANATEE G. "MG" TESTPATIENT. Below this, a 'Review Details' section is visible, with 'Item type' set to DISCLOSURE and 'Item category' set to Immunization Record (highlighted with a red box). Other fields include Reviewed? (checked), Reviewed by Susan Kressly, Review date 3/18/2021 2:30:52 PM, Shared To Portal (checked), Portal Exp Date, Privacy level Any staff member, and Notes Vaccination Status Letter.

Below the patient information, there is a sidebar with icons for a document, a dollar sign, a folder, and a heart. The main content area is titled 'Encounter Notes' (highlighted with a red box). It contains a table with columns 'Encounter Date' and 'Name'. The table lists three encounters:

Encounter Date	Name
3/18/21 2:34 PM	Immunization Record (highlighted with a red box)
3/11/21 12:26 PM	PATIENT VISIT NOTES
3/9/21 8:22 AM	OFFICE VISIT