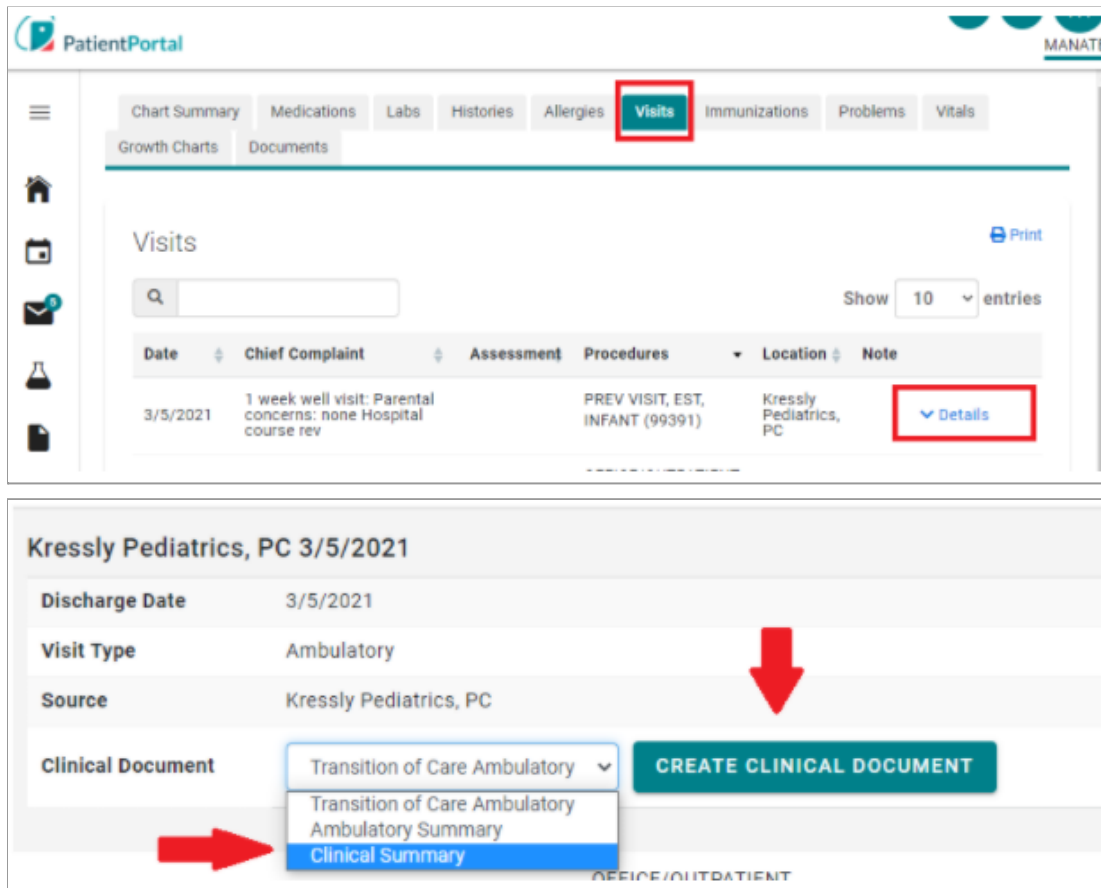


## March 12, 2021 Portal Tips & Tricks

Patient instructions are available for families on the portal. Here's how they can get to them:

1. Navigate to the Visits section in the patient chart
2. Locate a specific visit and select Details,
3. In the Clinical Document type drop-down select Clinical Summary and then click the Create Clinical Document button
4. Patient instructions are available in the instructions section of the Clinical Document



The screenshot shows the PatientPortal interface. The top navigation bar includes tabs for Chart Summary, Medications, Labs, Histories, Allergies, **Visits** (highlighted with a red box), Immunizations, Problems, and Vitals. Below this, the Visits section is displayed with a search bar and a table of visits. The table has columns for Date, Chief Complaint, Assessment, Procedures, Location, and Note. A red box highlights the 'Details' link in the Note column for the visit on 3/5/2021.

Below the Visits section, the details for the visit 'Kressly Pediatrics, PC 3/5/2021' are shown. The details include Discharge Date (3/5/2021), Visit Type (Ambulatory), and Source (Kressly Pediatrics, PC). A red arrow points down to the 'Clinical Document' section. In this section, a red arrow points to the 'Clinical Document' dropdown menu, which is open and shows options: 'Transition of Care Ambulatory', 'Transition of Care Ambulatory', 'Ambulatory Summary', and 'Clinical Summary' (highlighted in blue). To the right of the dropdown is a green button labeled 'CREATE CLINICAL DOCUMENT'.

## INSTRUCTIONS

Instruction	Type
Your child was seen today for a 1 week well visit. Please read all information and resources that were given to you in our office or published on our patient portal. Your next well visit in the office will be at age 1 month. If you did not schedule that appointment before you left the office, please call to schedule as soon as possible. Remember to put your baby to sleep on his/her back on a sleeping surface which is separate from yours. Feel free to contact our office with any questions or concerns or if you are feeling overwhelmed or depressed.	Clinical

## ENCOUNTERS DIAGNOSIS

Encounter Date			
3/5/2021			
Encounter Diagnosis	Code	Code System	Date
Health examination for newborn 8 to 28 days old	Z00.111	Icd10	3/5/2021

In addition, practices can [print the patient exit note in the office to PDF and share to the portal](#) and the family can view it in the Documents section.

**Note:** OP will be improving this functionality for our practices in the future.