

April 12, 2021 Portal Tips & Tricks

Cleaning Up the Problem List to Address Sensitive Information

Recommendation: Now that the April 5th applicability date for the Cures Act has arrived, we recommend you review your problem list items and adjust their level of privacy as appropriate. You can start with the SQL in the DataBase Viewer Clip and Save Library called [Visibility Clean-up: Problem List](#). As you identify sensitive items, if you change their status to anything other than “[Any Staff Member](#)” they will be removed from the portal.

Archive Records After Hours

If you use the [archive functionality](#) to clean up inactive patients, messages, surveys, etc. please perform these operations after your business hours. These bulk changes in data result in large numbers of updates being sent and may impact real time flow of office portal interactions and surveys.

