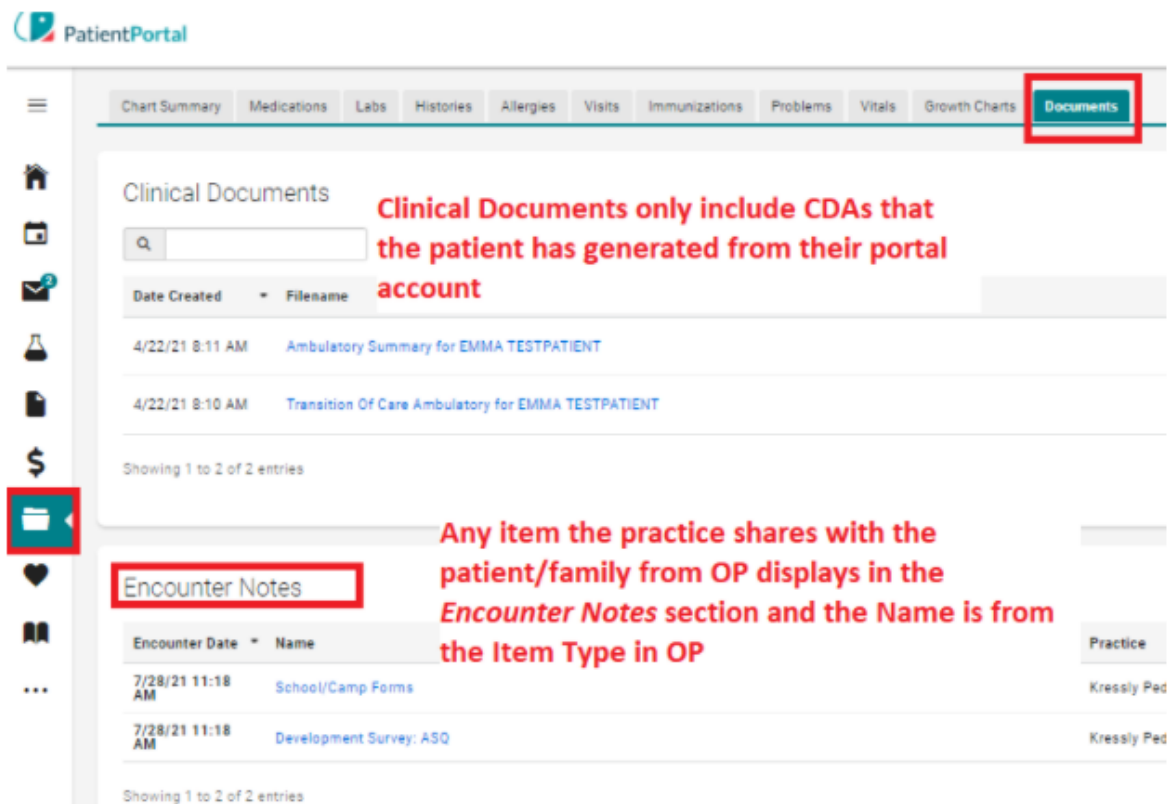


## July 28, 2021 Portal Tips & Tricks

### *CDAs on the Portal*

We encourage you to share with your practice team and patients/families that the IntelliChart Portal Documents tab displays only CDAs in the Clinical Document Section of the Document tab. Any materials (including documents within your OP instance) that you share to the portal are found under the Encounter Notes section. We understand that this can be confusing and are working with IntelliChart to improve this functionality.



**PatientPortal**

Chart Summary Medications Labs Histories Allergies Visits Immunizations Problems Vitals Growth Charts **Documents**

**Clinical Documents**

**Clinical Documents only include CDAs that the patient has generated from their portal account**

Date Created	Filename
4/22/21 8:11 AM	Ambulatory Summary for EMMA TESTPATIENT
4/22/21 8:10 AM	Transition Of Care Ambulatory for EMMA TESTPATIENT

Showing 1 to 2 of 2 entries

**Any item the practice shares with the patient/family from OP displays in the Encounter Notes section and the Name is from the Item Type in OP**

**Encounter Notes**

Encounter Date	Name	Practice
7/28/21 11:18 AM	School/Camp Forms	Kressly Ped
7/28/21 11:18 AM	Development Survey: ASQ	Kressly Ped

Showing 1 to 2 of 2 entries

