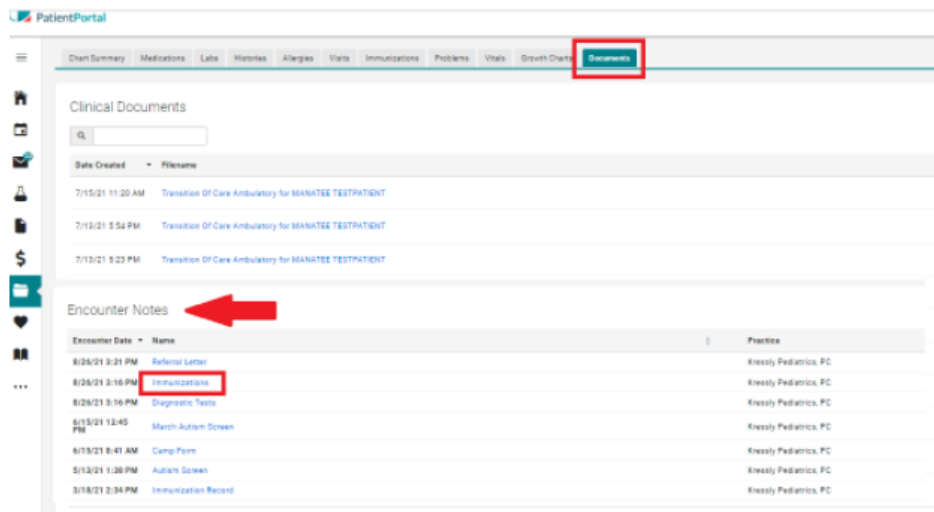


September 8, 2021 Portal Tips & Tricks

Helping Parents Find Shared Documents

If you share a document with a patient/family and they report they can't find it, here are some tips to assist them:

- Verify they are looking at the child's chart, not the parent's chart
- Ask them to navigate to the patient chart, documents section
- The document you shared will not be under the top "Clinical Documents" section, but rather in the "Encounter Notes" section



- Clicking on the Name of the file will download the document. It will be in the same format (PDF, jpg, tif) in which the practice originally uploaded it.
- Some parents may have trouble opening the document on their mobile device, as they may not have a program to open certain types of files. If they can see the name, but can't download/open it, direct them to try on a computer web browser.
- In addition, when documents are shared, a message alerting the parent is available both on the parent log in and under the patient's messages.

