


Add Handouts to the Patient Portal

PURPOSE:

1. Address patient requests promptly.
2. Correct missteps in encounter processing by providing forgotten documents quickly.

PROCEDURE:

Expected Time Frame: As needed.

1. Open the patient's chart and review the encounter notes until you find the one where the clinician noted a handout would be placed in the Portal.
2. Hover over "my documents" then click "browse my documents."
3. Click the "handouts" tab, then find the handout the clinician referenced in the encounter note.
4. Right-click on the handout, then choose "copy to current pt's chart" and click "ok."
5. Title: leave as it defaults.
6. Document Type: handouts.
7. Patient Notification: you may do either of the following:
 1. Leave to default (notification not needed).
 1. Show in patient's portal.
 2. Done, file document.
 3. In the PPQ, click  to respond to the patient with a message that instructs them where to find the document. For example:

Hi, [*patient name*],

I apologize that we didn't get your handout to you sooner as mentioned in [*clinician's name*]'s note. You can now find the [*name of handout*] in the Labs and Documents section of your Patient Portal. Please let us know if you need anything else.


[*your signature*]

2. Underneath "notify patient" on the right, click "notify by portal."
 1. In the "send notice about the document via portal" box, type a message to the patient that instructs them where to find the document. For example:

Hi, [*patient name*],

I apologize that we didn't get your handout to you sooner as mentioned in [*clinician's name*]'s note. You can now find the [*handout name*] in the Labs and Documents section of your Patient Portal. Please let us know if you need anything else.

[*your signature*]

2. Show in patient's portal.
3. Done, file document.
4. In the PPQ, click  to archive the message.