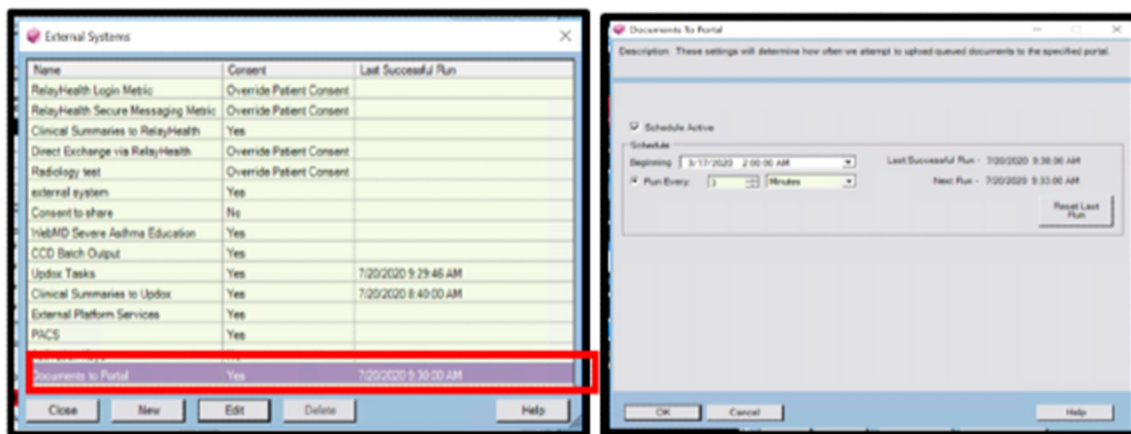


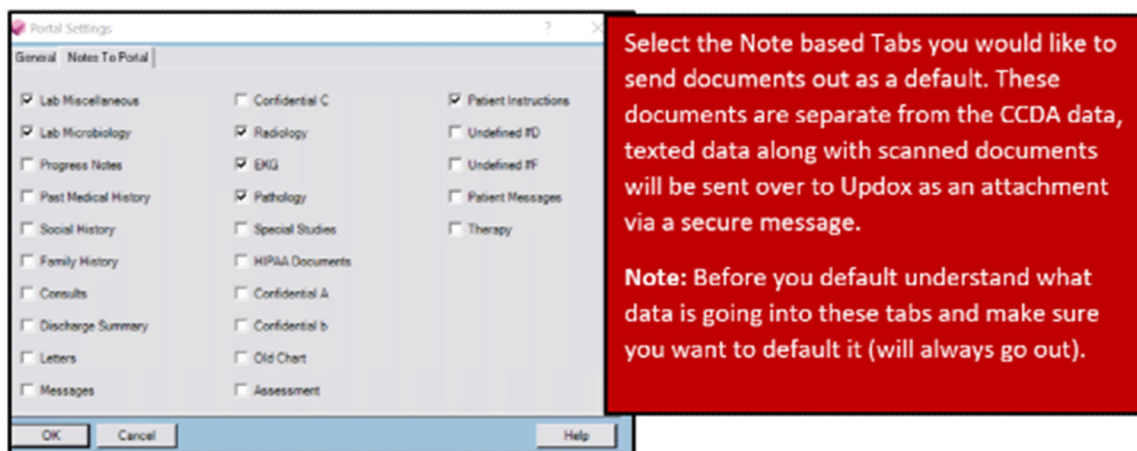
# Practice Partner Tips & Tricks: Sending documents to Updox Patient Portal

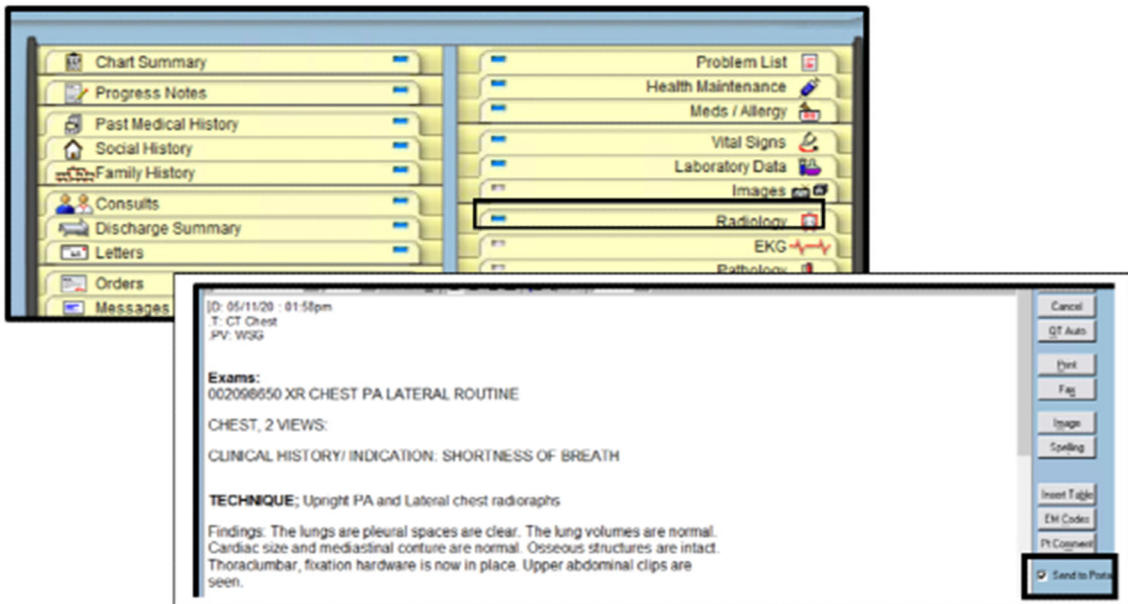
Documents can be submitted to Updox Portal by selecting Note based tabs of Practice Partner, it is possible to set up defaults that will submit to the portal when Notes are saved, or Notes/Documents can be sent to the portal depending on circumstances.

- Must be current on Practice Partner 11.2 Patches.
- Set up the task to send these over: Maintenance>Set Up>External Systems>Documents to Portal.

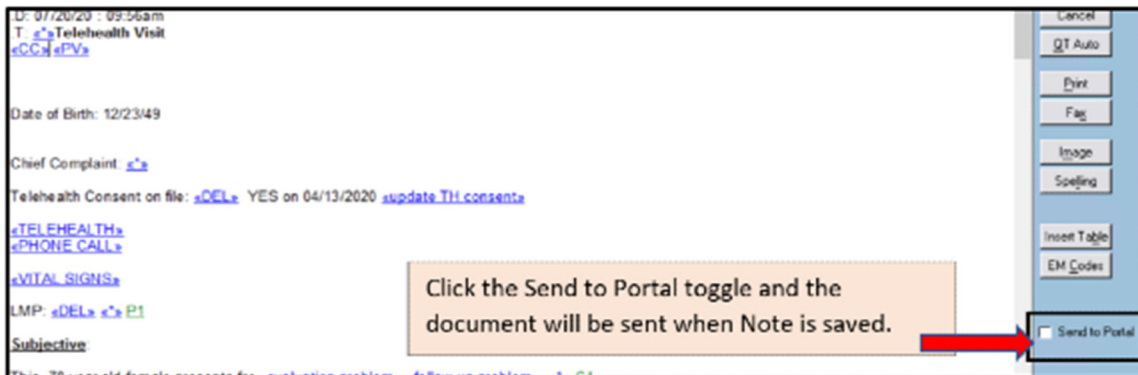


- To set up defaults: Maintenance>Set Up>Portal Settings





- Defaulted tabs will send the document over to Patient portal when saved.
- The ability to send a document on base by base circumstance is available by clicking the Send to Portal check box when documenting in it, for example a Progress note you want to send this time Or a Telehealth visit:



- A new Document Log is found under Reports>Portal Documents>Send to Portal Log.

