Office Practicum

Send Client Education to the Portal

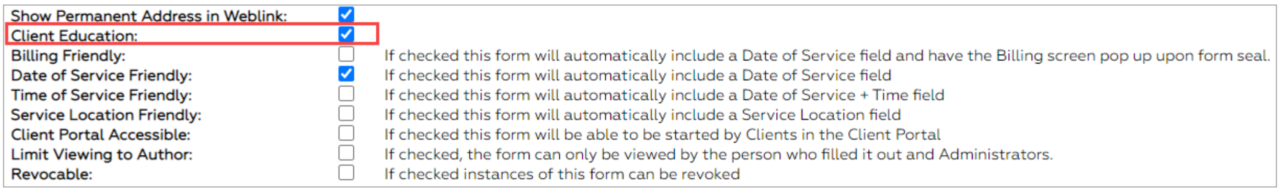
Last Modified on 03/10/2022 4:24 pm EST

About

In order for a Form to be displayed as Client Education in the Document section of the Client Portal, it needs to be set up as Client Education and a Clinician needs to push the Form to the portal.

Set Up an Existing Form as Client Education for the Portal

1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. Select an existing Form from the drop-down menu.
3. Click the **Edit This Form** button.
4. Select the **Client Education** checkbox.

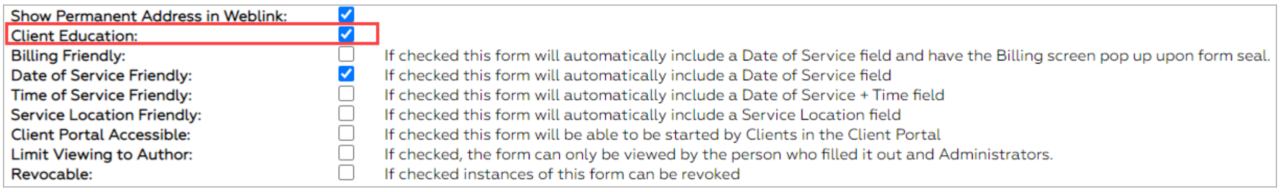


Show Permanent Address in Weblink:	☑	
Client Education:	☑	
Billing Friendly:	☐	If checked this form will automatically include a Date of Service field and have the Billing screen pop up upon form seal.
Date of Service Friendly:	☑	If checked this form will automatically include a Date of Service field
Time of Service Friendly:	☐	If checked this form will automatically include a Date of Service + Time field
Service Location Friendly:	☐	If checked this form will automatically include a Service Location field
Client Portal Accessible:	☐	If checked this form will be able to be started by Clients in the Client Portal
Limit Viewing to Author:	☐	If checked, the form can only be viewed by the person who filled it out and Administrators.
Revocable:	☐	If checked instances of this form can be revoked

5. Click the **Update** button.

Set Up a New Form as Client Education for the Portal

1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. Click the **Add New Form** button.
3. Fill in the appropriate fields for the Form and select the **Client Education** checkbox.



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4. Click the **Add** button.

Send Client Education to Portal

From Admissions/Clinical Forms

1. Navigate to the Form that will be sent to the portal: **Main Menu > Admissions or Clinical Forms Menu > select Form type > select the radio button for the Form.**
2. Click the **Open Form** button.
3. Fill in the appropriate fields for the Form.
4. Choose one of the two following options to send the Form to the portal:

- **Save and Send to Patient Portal:** In the Send Form to Patient Portal window, select a client login from the drop-down and click **OK**.

> **Notes**: If you incorrectly chose to send to the portal but did not mean to you can click the **Remove from Patient Portal** button.

- **E-Signature/Seal:**
    a. In the E-Signature/Seal window, complete the appropriate fields and sign the Form by entering your password or selecting **Use E-Signatures**.
    b. Click **Submit.** A window is displayed confirming that the Form has been successfully Signed, Updated, and Sealed.
    c. Click **Send to Patient Portal**.
    d. Select a client login from the drop-down and click **OK.**

From the Document Center

1. Navigate to Document Center: **Main Menu > Reports Menu > Document Center**
2. Search for the client.
3. Choose the radio button for the appropriate **Case #**.
4. Click the **Open Case** button.
5. Choose the appropriate Form by selecting the corresponding radio button.
6. Click the **Open Form** button.
7. Choose one of the two following options to send the Form to the portal:

- **Save and Send to Patient Portal:** In the Send Form to Patient Portal window, select a client login from the drop-down and click **OK**.

> **Note**: If you incorrectly chose to send to the portal but did not mean to you can click the **Remove from Patient Portal** button.

- **E-Signature:**
    a. In the E-Signature window, sign the Form by entering your password or selecting **Use E-Signatures**.
    b. Click **Submit.** A window is displayed confirming that the Form has been successfully Signed.
    c. Click **Send to Patient Portal.**
    d. Select a client login from the drop-down and click **OK.**