Configure Note Types to be Viewed and Signed by a Client on the Portal

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> **Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Client Portal Configuration tab**

About

You can configure which clinical Note Types you want a client to view or view and sign on the Client Portal. Notes will automatically display in the Document Center on the Client Portal if designated to view or view and sign. Users with the Process Permission in Maintain Users, **Enable to Allow or Prevent a note from going to the Portal**, will be able to stop their notes from going to the portal regardless of the system Portal Note Permissions.
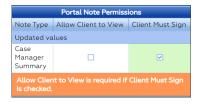
- Enable Note Types as Viewable and Signable on the Client Portal
- Disable Note Types as Viewable and Signable on the Client Portal

Enable Note Types as Viewable and Signable on the Client Portal

1. Navigate to Client Portal Configuration by following the path above.
2. In the Portal Note Permissions section, select the following:

    - **Allow Client to View**: Select this checkbox to view this Note Type on the Client Portal.
    - **Client Must Sign**: Select this checkbox to require a signature for the Note Type on the Client Portal.

> 📌 **Note**: If you select the **Client Must Sign** checkbox, you must also select the **Allow Client to View** checkbox or you will get the following message when trying to save your changes.
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3. Click the **Save changes** button.

Disable Note Types as Viewable and Signable on the Client Portal

1. Navigate to Client Portal Configuration: **Main Menu >Admin Tools Menu > System Setup (Supplemental) > Client Portal Configuration tab**.
2. In the Portal Note Permissions section, select the following:

   - **Allow Client to View**: Deselect this checkbox to remove this Note Type from being viewable on the Client Portal.
   - **Client Must Sign**: Deselect this checkbox to require a signature for the Note Type on the Client Portal.

3. Click the **Save changes** button.