Send a CCDA to the Portal

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> **Path: Main Menu > Clinical Forms Menu > Unscheduled Forms**

About

A Consolidated Clinical Document Architecture (CCDA) can be sent to the Client Portal for a client to view, download, or share with other Healthcare providers. Your Agency must sign/seal the two Forms below in order for the CCDA to be sent to the Client Portal.

> 📌 **Note**: This functionality is exclusive to Agencies with the MU package and who have a Client Portal. A client must also have a portal account.

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Step 1: Complete the Client Health History Form

1. Navigate to Unscheduled Forms by following the path above.
2. Search for and select a client if not already displayed.
3. Expand the **Misc** section if not already displayed.
4. Select the **Client Health History** Form radio button.
5. Click the **Open Form** button.
6. Add a **Date of Service** and fill in the appropriate fields for the Form.
7. Click the **E-Signature/Seal** button then sign and seal the Form as you normally would.

Step 2: Complete the Health Summary Form

1. After the Client Health History Form is complete, click the **Unscheduled Forms** button to complete the Health Summary Form.
2. Expand the **Misc** section if not already displayed.
3. Select the **Health Summary Form** radio button.
4. In the **Date + Time of Service** field enter date/time of Service.

> 📌 **Note**: Do **not** click the Upload/Change Document button as the CCDA will automatically be attached.

5. Click the **E-Signature/Seal** button then sign and seal the Form as you normally would.