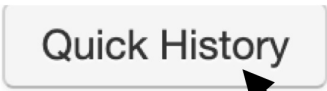


# Accessing Patient Documents when Charting on the Web

07/24/2024 11:54 am EDT

If you are within a patient's clinical note and need to access their documents, all you have to do is click on the **Quick History** button.

From the **Clinical Note** click on the **Quick History** button at the top right corner.



Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL APPS

View Appointment Quick History Copy Previous Note

**Jenny (Jen) Harris** (Female | 41 years | 02/11/1980 | HAJE000001) | Brendan Wilberton | 10/12/2021

Chief Complaint

Primary Insurer: (60054) Aetna

Growth Charts Vitals Print section Fax section

No Include in Note \*Add to note\* must be checked for this to render.

HPI \* Social HX

Past Medical HX Family HX

General  OFF

Once you click on the **Quick History** button, you will be redirected to the **Documents** section of the patient's chart. The documents section will open in a new tab.

+ Add new patient

Demographics Appointments Clinical Dashboard Documents Eligibility Tasks Problem List Medication List Send eRx Allergy List Drug Interactions CQMs Intake Data Lab Orders Immunizations Growth Charts onpatient access Education Resources Communication

**Jenny (Jen) Harris** (Female | 41 years old | Feb. 11, 1980) | HAJE000001

Phone: Address: 1001 N Rengstorff Ave Mountain View, CA 94040 CDS: Adult Immunization Schedule Age: 27-49

Date Added: June 8, 2021 Last Scheduled Appt: Tue Oct 12, 2021 Next Scheduled Appt: Tue Oct 12, 2021

onpatient access enabled New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.

Uploaded Documents Locked Clinical Notes Signed Consent Forms Outbound Referrals Lab Results Amendments

Add new documents for this patient Select Files to Upload Syncing with box

Drop files anywhere onto this page Upload Files

Document Tags

Summary of Care x1 fax x1 imported x2 sonogram x4 photo x2 image x1 lab x1 xray x1 ultrasound x4 free draw embed x9 free draw x5 c-cds x2 All Documents

Uploaded Documents

Date	Description	Additional URL	Document Tags	Uploaded on	Actions
09/10/2021	Summary of Care		c-cds imported	09/10/2021	Send to onpatient Fax Task X
08/30/2021	Freedraw [Clinical Note]		free draw embed	08/30/2021	Send to onpatient Fax Task X