How do I make a patient's CCDA available to them in OnPatient?

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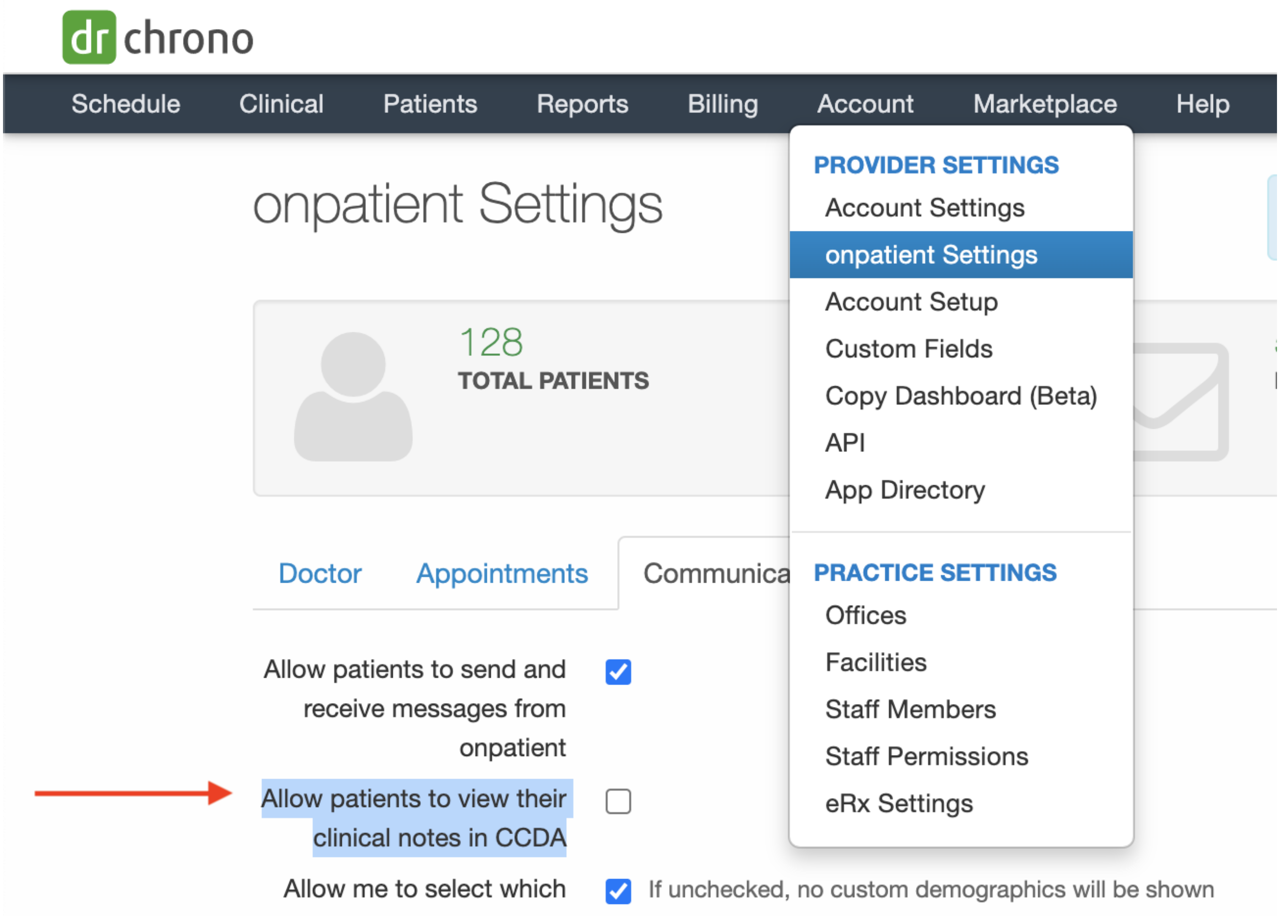
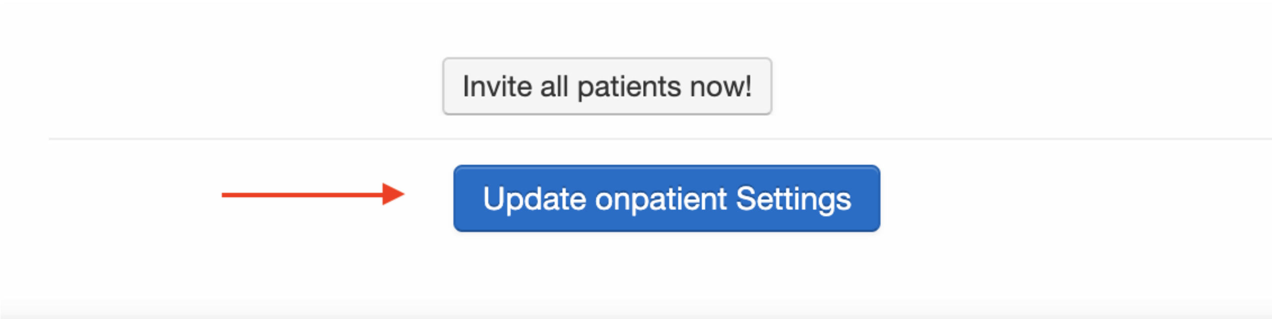
To allow your patients to view, download, and send their CCDA file within their OnPatient Portal account, practices will need to enable a few settings as defined below.

Step 1: Enable the OnPatient Clinical Notes Setting

Navigate to **Account** at the top of the DrChrono EHR screen and under **Provider Settings** click **onpatient settings**. Check the box to the right of Allow patients to view their clinical notes in CCDA.



Next, click the blue **Update onpatient settings** at the bottom of the screen.



Step 2: Setup Your Clinical Forms' Form Type

In order to pull in your clinical notes into the CCDA, your clinical forms must be setup with the appropriate Form Type. For more information on how CCDAs work with Clinical Notes in the new Form Builder follow the steps in this article: Clinical Notes in the CCDA with the New Form Builder

Note: Now that your clinical form types are setup, this setting only pulls in clinical data into the patient's CCDA files from the date/time the setting was enabled forward.

If you need to share previous patient notes with your patient, open the Patient's Chart, navigate to the **Documents > Locked Clinical Notes** and select the **Send to OnPatient** button for any Clinical Notes you wish to share with the patient. The patient will receive a notification email that a document has been shared with them to view in their OnPatient portal account.