

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

07/24/2024 4:10 pm EDT

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.



Screenshot of the DrChrono OnPatient Settings page. The 'Account' menu is open, showing 'onpatient Settings' selected. The main content area shows 'onpatient Settings' with a 'TOTAL PATIENTS' count of 128. Under the 'Communications' tab, the setting 'Allow patients to view their clinical notes in CCDA' is highlighted with a blue box and a red arrow pointing to its unchecked checkbox. Other settings include 'Allow patients to send and receive messages from onpatient' (checked) and 'Allow me to select which' (checked). A note states: 'If unchecked, no custom demographics will be shown'.

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

Invite all patients now!



Update onpatient Settings

## 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.

The screenshot shows the Chrono EHR interface for a patient named Carly A. Kaky SR. The patient's chart ID is KACA00003. The interface includes a sidebar with navigation options like Demographics, Appointments, and Documents. The main content area displays patient details, flags, and a table of Locked Clinical Notes.

Date of Service	Reason	Locked by	Locked On	Actions
09/24/2023	Testing FHIR API	ONC Provider1a	09/27/2023	Fax   Retract from onpatient   View Notes
09/20/2023	Testing CCD push to connectEHR	ONC Provider1a	09/20/2023	Fax   Send to onpatient   View Notes
08/24/2023		ONC Provider1a	08/24/2023	Fax   Send to onpatient   View Notes
06/23/2023		ONC Provider1a	06/02/2023	Fax   Send to onpatient   View Notes
12/07/2022		ONC Provider1a	12/16/2022	Fax   Send to onpatient   View Notes