

## Web-Enable (During the visit)

## If patient accepts portal access:

1. Open the patient appointment window when the patient checks in.

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- Enter the e-mail address of the patient in the 'Email' box and check the 'Web-Enable' box.
- Then click 'OK' at the bottom of the page.

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## If patient declines portal access:

1. Open the patient appointment window when the patient checks in.

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- 2. Under 'Visit Status', select 'Checked-in/Arrived' and click 'OK'.
- The 'Web Enable Patients' pop-up window should appear. Check the 'Do not web enable' box.
- 4. Select the reason why the patient declines portal access in the drop-down menu.
- 5. Click **'Submit'** to complete.





## Web-Enable (Post visit)

- 1. Find and open the completed patient encounter
- Click the Visit Status drop-down menu, then select 'Checked-in/Arrived' and click 'OK'.



- The 'Web Enable Patient' pop-up window will appear. Click the 'Do not web enable' check box.
- 4. Select the reason why the patient can not be web-enabled in the drop-down menu.
- 5. Then click 'Submit'.



You will return to the appointment window. In the Visit Status drop-down menu, select 'Checked-Out' and Click 'OK'.

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