

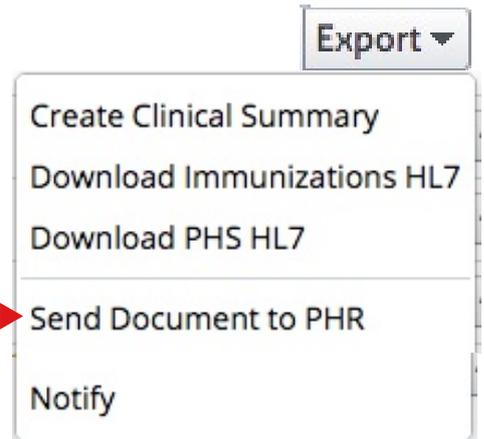
# Quick Reference Guide: Send/Remove Documents in PHR

This guide provides instructions for how to send documents to the PHR Portal from a single patient's chart. eScribeHOST automatically notifies the designated recipient(s) via email when a document is sent to his/her PHR Portal.

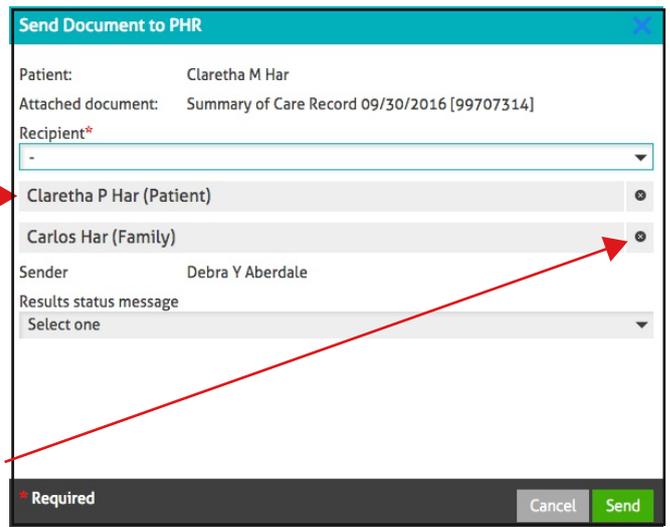
## Send Document to PHR

**Before you begin:** You must have the "View Encounters" permission to send a document to the PHR.

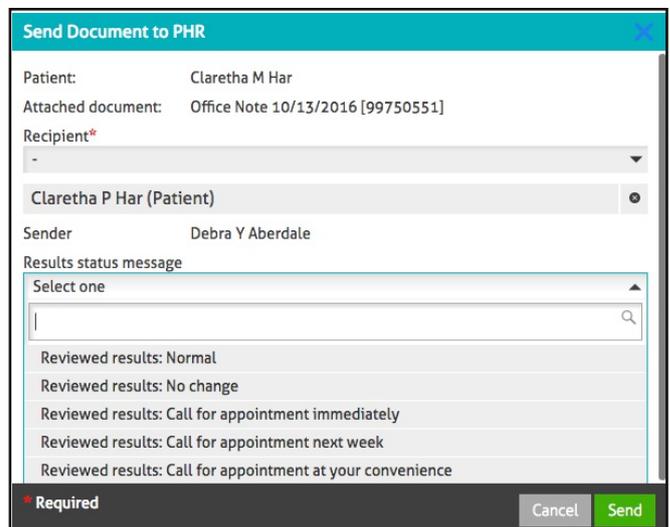
1. Open the patient chart.
2. Click on the Export dropdown list in line with the document you want to send to the PHR Portal.
3. Click Send Document to PHR to open the Send Document to PHR popup.
  - The "Send Document to PHR" option is disabled for documents with a status of "In Progress."



4. Select recipient(s).
  - You can select multiple PHR users to receive the notification email.
  - The PHR User who is the patient is selected by default to receive notification email.
  - You cannot send the document unless a PHR User exists for this patient chart. If no PHR User exists for this chart, you are directed to the Add PHR User popup and then returned to the Send Document to PHR when the PHR User account has been added.
  - Click the  on the right to remove a recipient from the list of selected recipients.



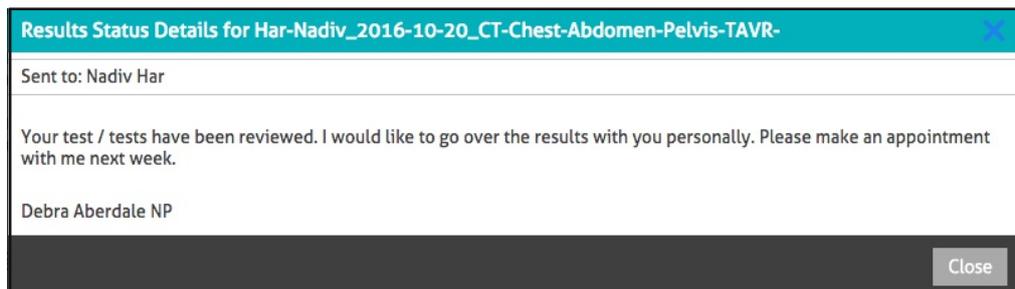
5. [OPTIONAL] Select a pre-defined results status message regarding the document being sent.
  - This message is optional. It is used to communicate lab and imaging test results in an easy and efficient way.
  - Five messages have been defined for easy selection.
  - The selected recipient will receive an additional email about the status message.
  - The logged in user who is sending the document to the PHR Portal is identified as the sender of the attached status message.



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## Send Document to PHR (continued)

6. Click the Send button.
  - Popup closes.
  - The  label displays in the Documents List for the sent document.
  - Notification email about the document is sent to the selected PHR user recipient(s).
  - Document is added to the PHR Documents list in the PHR Portal.
  - If a status message was selected, a Notification email about the status message is sent to the selected PHR user recipient(s).
  - If a status message was selected, the status message displays and a details link is added to the right of the lab or imaging results document in the PHR Documents list in the PHR Portal.



## Remove Document from PHR

**Before you begin:** You must have the "Access PHR Chart Section" permission to remove a document from the PHR.

1. Open the patient chart.
2. Click the PHR tool at the bottom of the vertical tool bar.



3. Click the trashcan tool  to the left of the document you want to remove from the PHR.
4. Click the Delete button to confirm.
  - Popup closes.
  - Document is removed from the PHR.
  - The  label is removed from the document line in the Documents List.

