## Sharing Docs

The process to share is:

- Select the Patient
- Select the Document
- Choose the Forward Arrow
- Select External System or Mail
- Select Provider ** THIS IS REQUIRED**
- Type in Provider Name > and select. The system will populate.
- Then hit Share

Open up a patient chart and click on a document to open it up.

- Once the report is open, users will see small icons on the top left corner. Select the far right icon of a paper with an arrow pointing to the right.
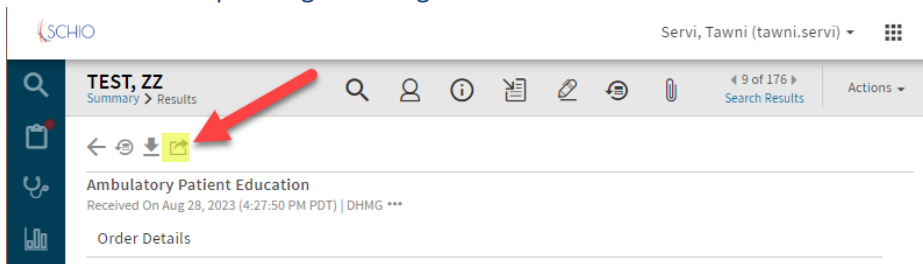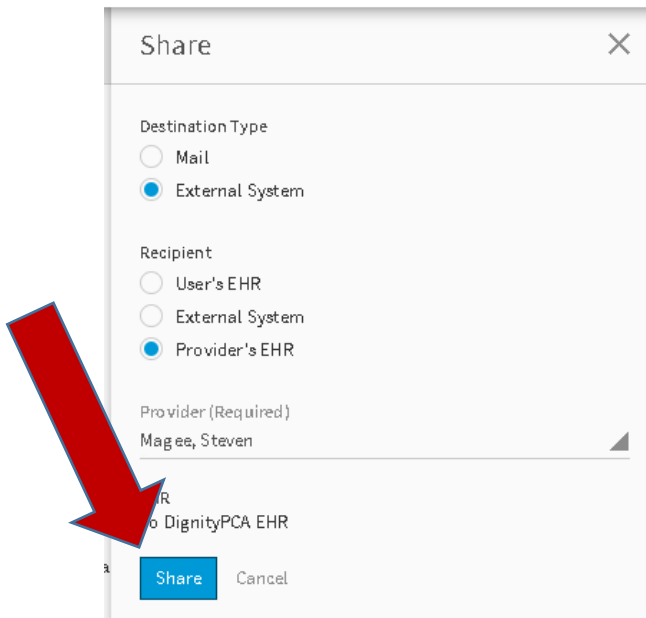

The user must select a Provider EHR.   EHRs will not deliver a message without the provider.

- On Provider (Required) click the right triangle on the corner and search for the provider by name or 10-digit NPI number. Search NPI Records here - https://npiregistry.cms.hhs.gov
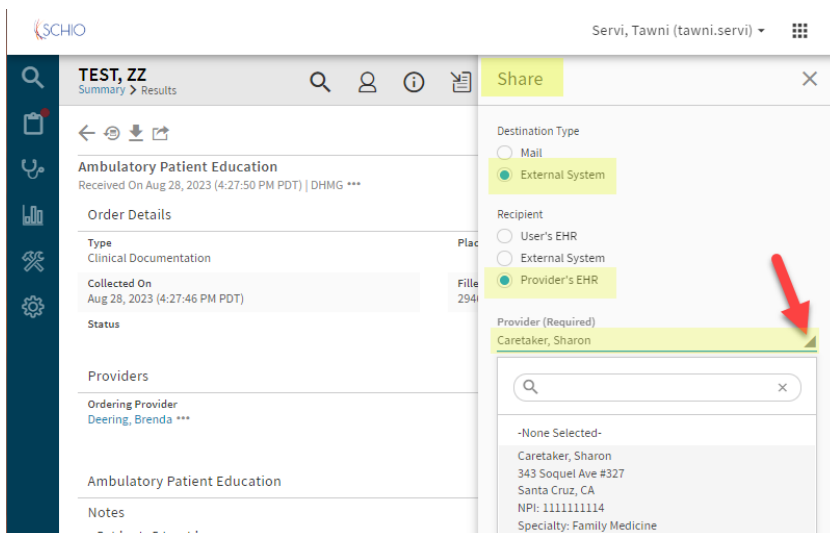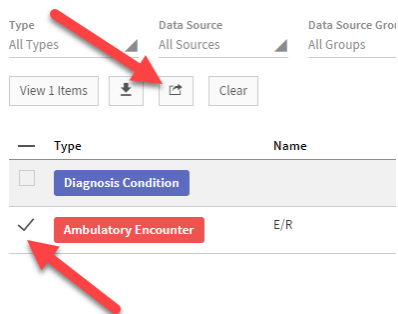
Next click Share.

Multiple document sharing

- Navigate to Actions -> Download/Share Clinical Items.

- Select the documents you'd like to share, then click the share icon.

- There are a few different options to share including directly into the clinicians's EHR or sending a Direct email message.

Share **1**

Destination Type
- ● Mail
- ○ External System

Recipient
- ● User
- ○ Provider
- ○ Direct Address

User (Required)
Servi, Tawni (tawni.servi)

Subject

Body

⬤ Include Patient Link

Attachment
- ● PDF
- ○ C-CDA
- ○ None

Data Level
- ● Summary
- ○ Detail

[Share] Cancel

Share **2**

Destination Type
- ● Mail
- ○ External System

Recipient
- ○ User
- ● Provider
- ○ Direct Address

Provider (Required)
Khademi, Ali

Subject

Body

⬤ Include Patient Link

Attachment
- ● PDF
- ○ C-CDA
- ○ None

Data Level
- ● Summary
- ○ Detail

[Share] Cancel

Share **3**

Destination Type
- ● Mail
- ○ External System

Recipient
- ○ User
- ○ Provider
- ● Direct Address

Direct Address
tawni.servi@direct.santacruzhie.org

Subject

Body

⬤ Include Patient Link

Attachment
- ● PDF
- ○ C-CDA
- ○ None

Data Level
- ● Summary
- ○ Detail

[Share] Cancel

Share **4**

Destination Type
- ○ Mail
- ● External System

Recipient
- ● User's EHR
- ○ External System

User (Required)
Weber, Robert (robert.weber)

Attachment
- ● PDF
- ○ C-CDA

Data Level
- ● Summary
- ○ Detail

[Share] Cancel

*Not all users have a Direct email or EHR setup in our system. Please contact our support team at (831) 610-3700 or support@schio.org with any questions.