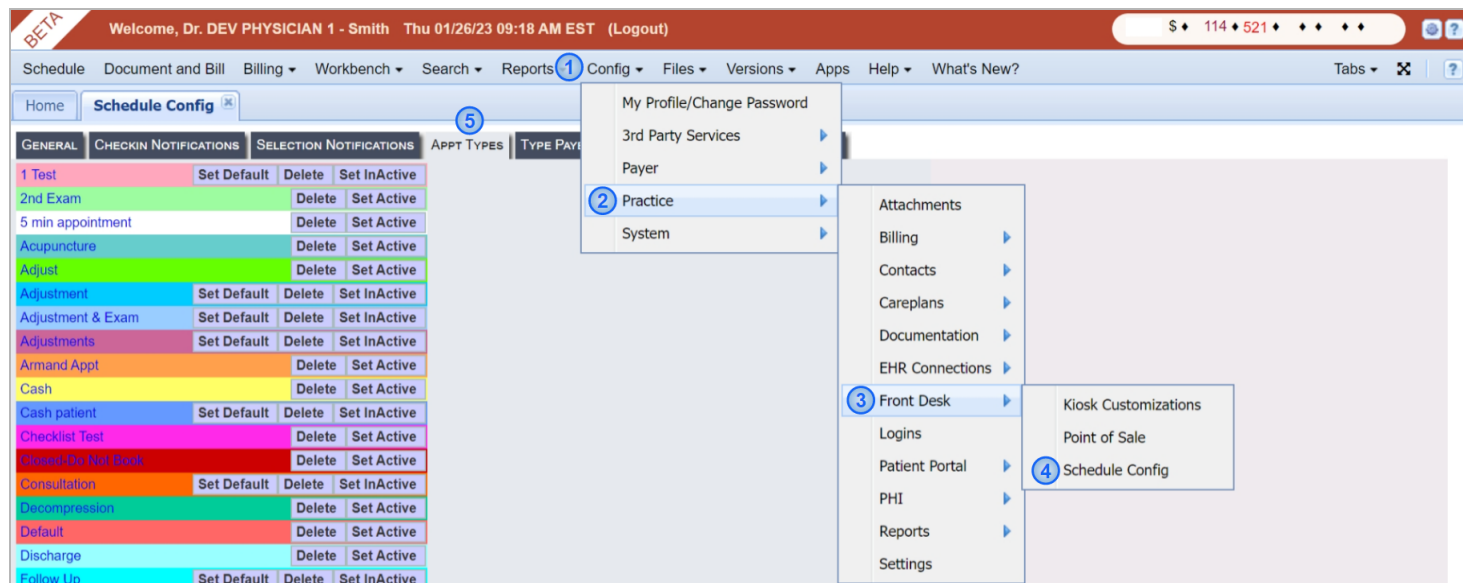


Automatic Document Publishing

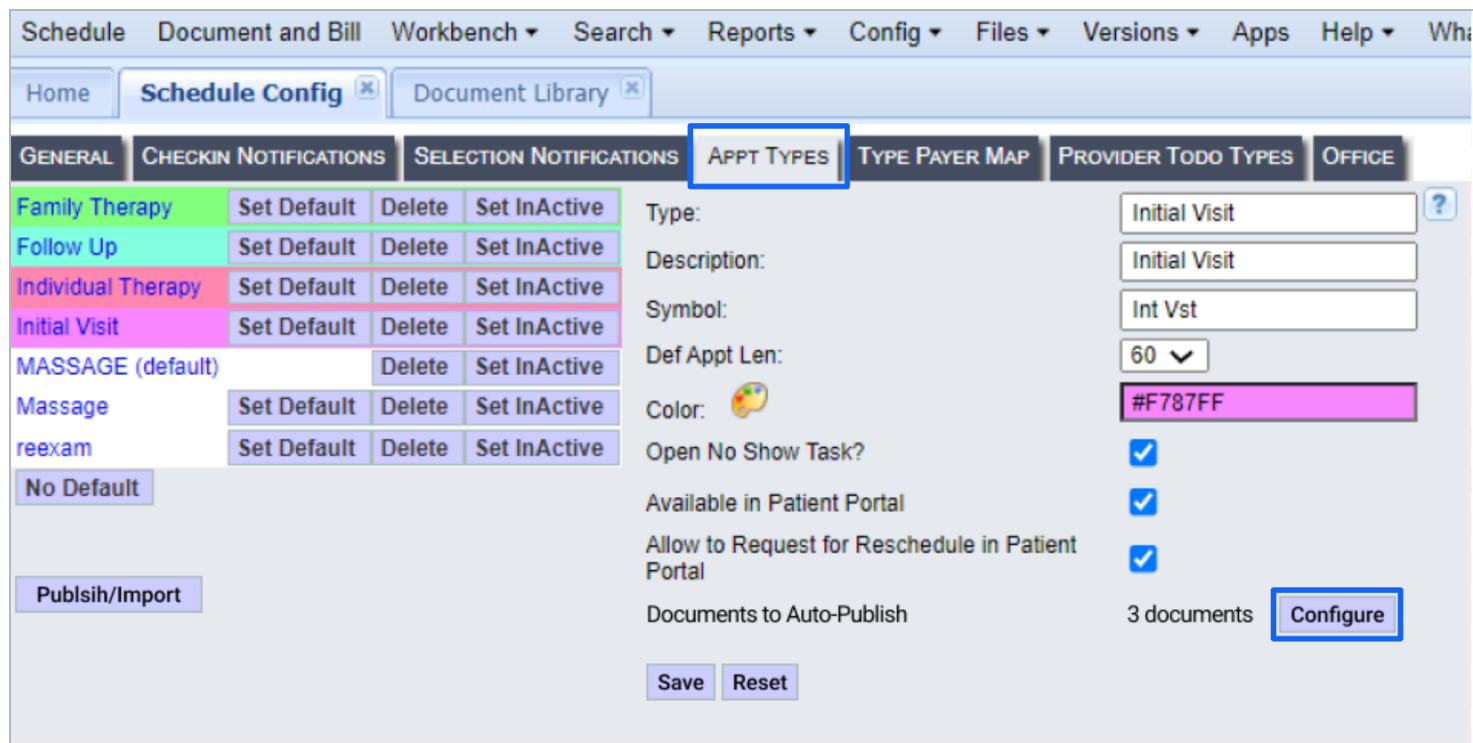
This new feature allows the practice to set up documents that can be automatically published based on the appointment.



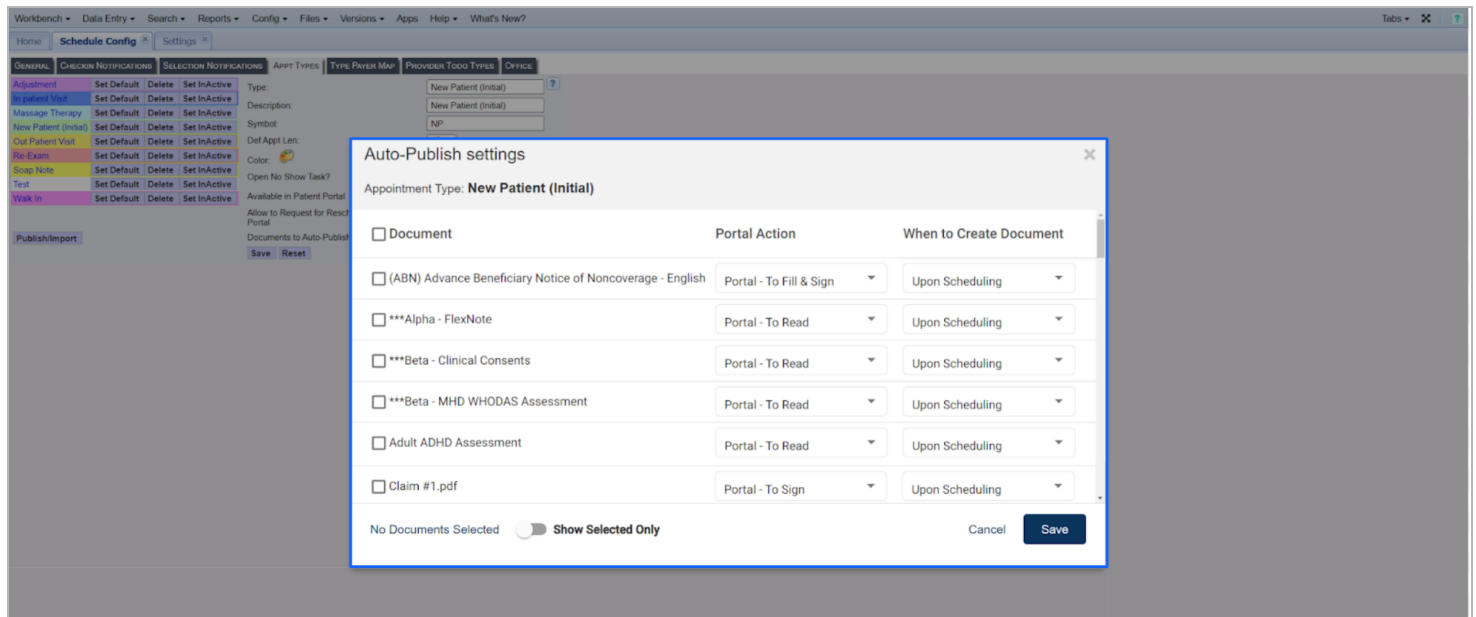
To configure Automatic Document Publishing:

1. Click on **Config**
2. Hover over **Practice**
3. Hover over **Front Desk**
4. Click on **Schedule Config**

Inside the Schedule Config, click on the **Appt Types** tab.



Once a new appointment type is created, or an existing appointment type is selected, click on **Configure**.



From the Auto-Publish settings popup allows the user to set when the document will be published.

Auto-Publish settings

Appointment Type: **New Patient (Initial)**

Document	Portal Action	When to Create Document
<input type="checkbox"/> (ABN) Advance Beneficiary Notice of Noncoverage - English	Portal - To Fill & Sign	Upon Scheduling
<input type="checkbox"/> ***Alpha - FlexNote	Portal - To Read	48 Hrs Prior to Appointment
<input type="checkbox"/> ***Beta - Clinical Consents	Portal - To Fill & Sign	Upon Scheduling
<input type="checkbox"/> ***Beta - MHD WHODAS Assessment	Portal - To Read	Upon Scheduling
<input type="checkbox"/> Adult ADHD Assessment	Portal - To Read	Upon Scheduling
<input type="checkbox"/> Claim #1.pdf	Portal - To Sign	Upon Scheduling

No Documents Selected ☐ Show Selected Only

Cancel Save

The auto-publish option is based on a preconfigured automated schedule which include:

- **Upon Scheduling** - the selected document will automatically be published to the patient portal upon scheduling.
- **48 Hrs Prior to Appointment** - the selected document will automatically be published at 5pm two(2) days prior to the scheduled appointment.

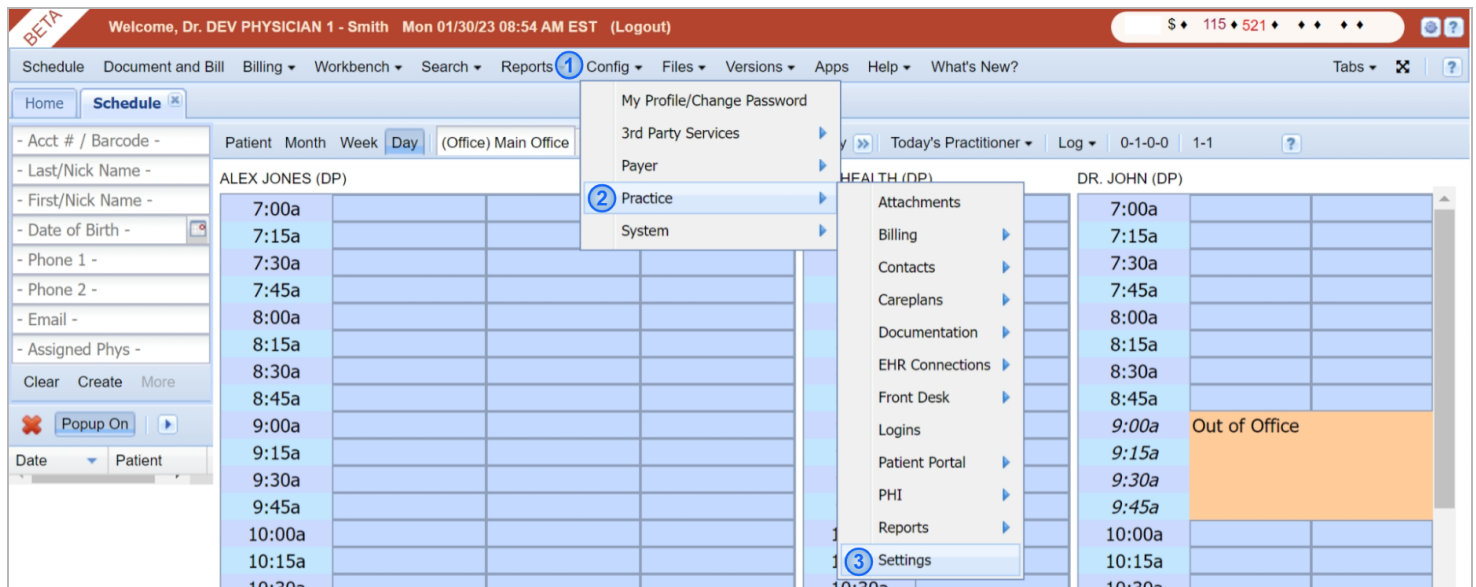
Note: Available documents for auto-publish will be based on the current document library.

Document Library

VERICLE/EHR - (SANDBOX) SANDBOX

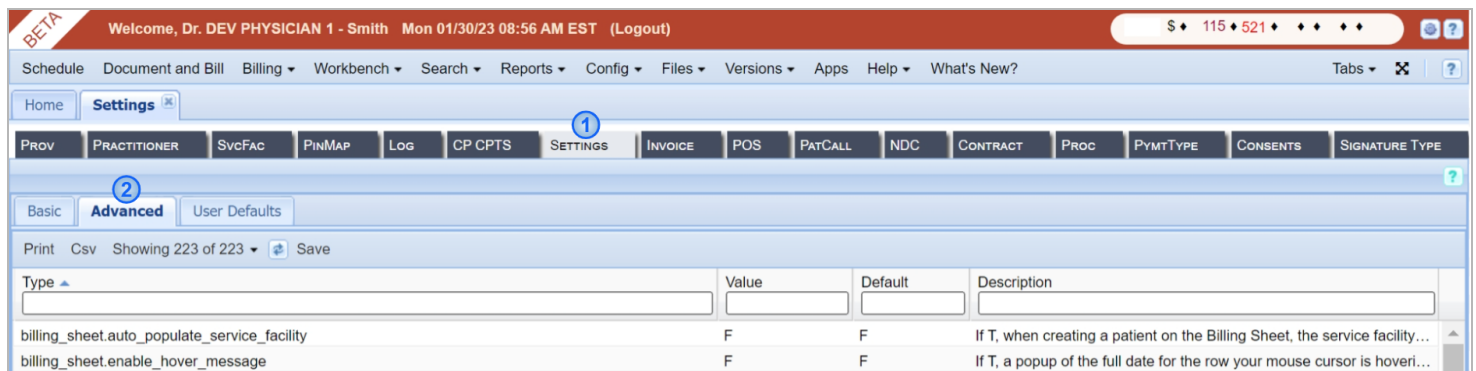
Name	Category	Portal Action (Default)
(ABN) Advance Beneficiary Notice of Noncoverage - English	Clinical Documents	
***Alpha - FlexNote	Clinical Documents	Portal - To Read
***Beta - Clinical Consents	Clinical Documents	Portal - To Fill & Sign
***Beta - MHD WHODAS Assessment	Clinical Documents	Portal - To Read
Adult ADHD Assessment	Clinical Documents	Portal - To Read
Claim #1.pdf	Clinical Documents	Portal - To Sign
FlexNote	Clinical Documents	Portal - To Read
Functional Rating Index (FRI)	Clinical Documents	Portal - To Read
Male Sexual Health Questionnaire	Clinical Documents	Portal - To Read
Metabolic Assessment		

Add a Document to Library: [Select XDoc](#) [Upload Document](#)



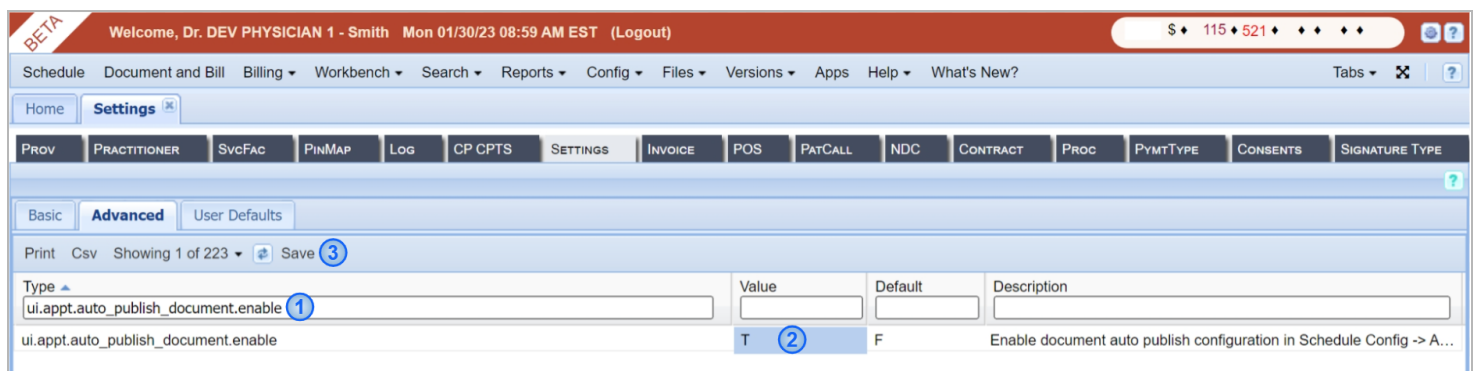
To enable this feature:

1. Go to **Config**
2. Hover over **Practice**
3. Then click **Settings**



From within the settings page

1. Click **Settings**
2. Click **Advanced**



Inside the advanced settings:

1. Type **ui.appt.auto_publish_document.enable** on the respective field and hit enter
2. Set the value to **T**
3. Click on **Save**