CCDA OnPatient Notes Process

Last modified on 11/18/2026 12:57 pm EST

Providing patients with easy access to their clinical information is an essential component of modern healthcare delivery. DrChrono's OnPatient portal enables practices to automatically share clinical notes with patients, streamlining information sharing, enhancing transparency and engagement, and ensuring compliance with regulatory requirements.

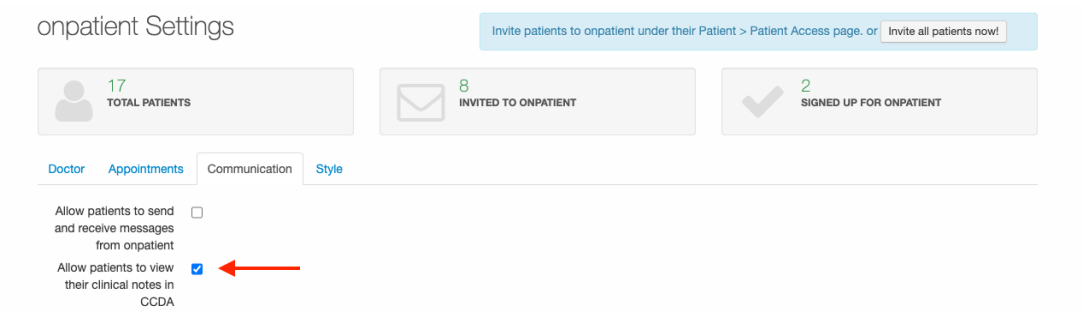
Configuration Steps

Enable Clinical Notes Sharing Setting

To begin sharing clinical notes with patients, you must first enable the appropriate system setting:

1. Log in to your DrChrono account
2. Navigate to Account Settings > OnPatient Settings > Communication tab
3. Check the box to "Allow patients to view their clinical notes in CCDA"
4. Save your changes

This global setting establishes the foundation for clinical note sharing .



Configure Clinical Form Templates

After enabling the global setting, you must ensure that all relevant clinical note templates are properly configured:

1. Access Clinical Form Management via Clinical > Clinical Form Management
2. Review each template that contains notes you wish to share with patients
3. Verify that the appropriate form type is enabled for each template
4. For detailed instructions on this process, refer to the article: Clinical Notes in the C-CDA with Clinical Form Management

> Only notes created using properly configured templates will be visible to patients in the Onpatient portal.

Patient Access via Onpatient

Once you have completed the configuration steps, patients will be able to view their clinical notes within the OnPatient portal. They can access these notes by following this navigation path:

1. Log in to their OnPatient account
2. Navigate to Health Profile
3. Select Complete Profile
4. Clinical notes will be displayed in this section, organized chronologically