



Patient Experience: Sign Treatment Plan in Patient Portal

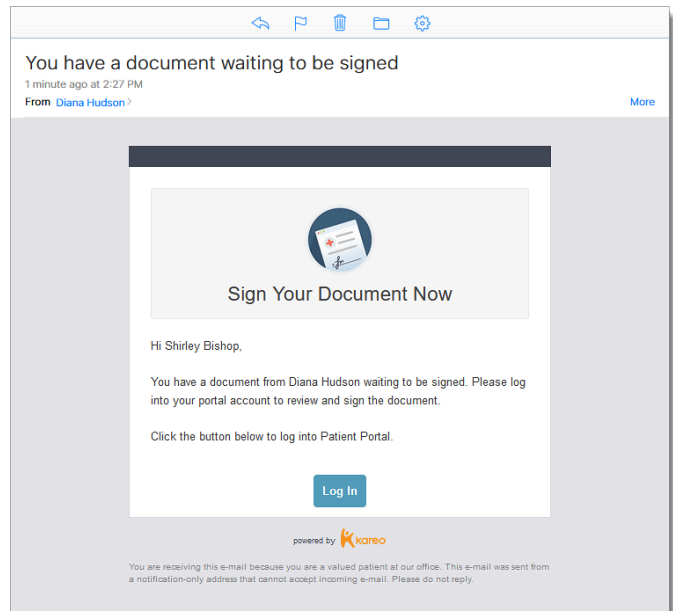
Kareo's [Treatment Plans](#) allow providers to build comprehensive treatment plans for their patients and can now capture the patient signature via the [Patient Portal](#). This gives the patient the ability to review and sign their tailored treatment plan at their own pace.

In order for the patient to sign the treatment plan via *Patient Portal*:

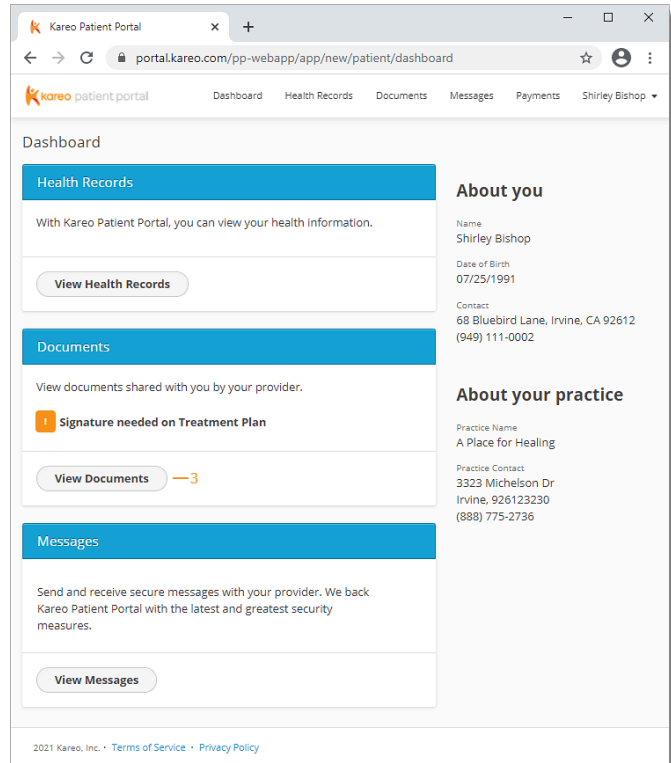
- [Invite the patient](#) to the *Patient Portal*
- The patient must activate the *Patient Portal* after receiving the email invitation

Access Treatment Plan

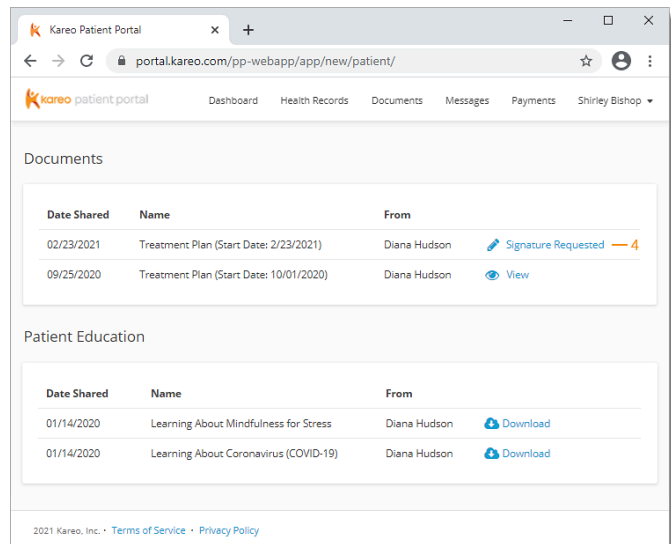
1. In the email, the patient click **Log In**. The [Patient Portal](#) page opens.
2. Patient enters their *Email* and *Password*. Then, clicks **Sign in**.



3. Patient clicks **View Documents**. The *Documents* page opens.



4. Patient clicks **Signature Requested**. The *Treatment Plan* page opens.



Sign Treatment Plan

5. Patient reviews the treatment plan details. Then, types their name in the designated field to electronically sign the form.
 - To save a copy of the treatment plan, click **Download**.
6. Patient clicks **Sign** when finished. The patient signature is captured in the form. In Kareo, the patient signature populates in the treatment plan and the status changes to [In Progress](#).

The screenshot shows a web browser window with the URL `portalkareo.com/app/new/patient/treatmentPlans/shared/details/`. The page title is "Kareo Patient Portal". The navigation menu includes "Dashboard", "Health Records", "Documents", "Messages", "Payments", and "Shirley Bishop". The main content area displays a treatment plan for "Planner by Jongsma" with the following details:

- Target Completion Date: 05/30/2021
- Treatment Frequency: Every 3 weeks

The "Signatures" section contains the following information:

- PROVIDER: Diana Hudson
- PATIENT: [Redacted]

Both the provider and patient signature fields have a date of 02/19/2021. A blue "Sign" button is located at the bottom of the form, with a red "5" and "6" next to it, indicating the steps described in the text.

At the bottom of the page, there is a footer: "2021 Kareo, Inc. • Terms of Service • Privacy Policy".

