

Navigate Documents

- a. *Documents*: Displays treatment plans that [requires a signature](#) by the patient and [shared treatment plans](#). Click to view details and optionally download.
- b. *Patient Education*: Displays [sent patient educations](#). Click **Download** to save the file.

The screenshot shows the Kareo patient portal interface. At the top, there is a navigation bar with the following items: Kareo patient portal, Dashboard, Health Records, Documents, Messages, Payments, and Shirley Bishop. Below the navigation bar, there are two main sections: Documents and Patient Education.

Documents Section:

Date Shared	Name	From	Actions
04/01/2021	Treatment Plan (Start Date: 04/12/2021)	Diana Hudson	Signature Requested
12/17/2020	Treatment Plan (Start Date: 12/20/2020)	Diana Hudson	View
02/26/2020	Treatment Plan (Start Date: 03/14/2020)	Diana Hudson	View

An orange bracket labeled 'a' groups the three rows in the Documents table.

Patient Education Section:

Date Shared	Name	From	Actions
02/11/2021	Sinusitis: Core Instructions	Diana Hudson	Download
02/11/2021	Soy Allergy: Core Instructions	Diana Hudson	Download
02/11/2021	Learning About Food Allergies	Diana Hudson	Download

An orange bracket labeled 'b' groups the three rows in the Patient Education table.

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