HealthInfoNet

CLINICAL PORTAL
USER MANUAL

For use with HealthInfoNet's Health Information Exchange Clinical Portal
Clinical Portal Version 8.9.15

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WELCOME

BRIEF OVERVIEW OF HEALTHINFONET

HealthInfoNet (HIN) provides a secure, standardized electronic system (a.k.a. the Clinical Portal) where health care providers can view medical data from separate health care sites to create a single electronic patient health record (EHR). The data is accessible to a patient's authorized health care providers when supporting treatment.

ABOUT THIS GUIDE

This guide will cover how to use the Clinical Portal, with everything from searching for a patient to making Worklists. Look out for notes, helpful tips, and safety disclaimers throughout the manual.

If you have any questions, or would like to discuss additional training needs, please contact HIN's Client Education team at **ClientEducation@hinfonet.org**.

KEY

 = Note to Take Into Consideration

 = Helpful Tip to Improve Workflow(s)

 = Safety Disclaimer to Be Aware Of

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ACCESS THE CLINICAL PORTAL

Depending on how your facility has been set up, the process to access the Clinical Portal is as follows:

1. Enter this URL into your browser: **https://maine.prod.hinfonet.org/concerto/Login.htm** [**OR**] use the link available through your organization's EHR
2. Enter your User ID and Password
3. Click "Login"

NOTE: The first time you log in you must accept the "Treatment Portal and Medication History" disclaimers. The Clinical Portal will prompt you to acknowledge these disclaimers annually for audit purposes.

HELPFUL TIP: On the homepage, users can see which organizations are sharing data with HIN by clicking on "Click here to see data captured in HealthInfoNet" link below the login button *(see image label 1)*.

SEARCH FOR A PATIENT

After logging in you can easily search for your patient in the Clinical Portal on the homepage by using the Demographic Search *(see image label 1)*.

Search for a patient by using one of the following combinations:
- First and Last Name *(see image label 2)*
- [**OR**] Last Name and Date of Birth

HELPFUL TIP: Another way to access your patient quickly is by clicking on "Recent Patients" in the left-side menu under "Patients". This will list your last 50 records accessed.

SAFETY DISCLAIMER: The search result may yield more than one patient. Confirm the name and date of birth to ensure you're viewing the correct patient's record.

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On this page you'll notice three columns labeled Opt-Out Date, Mental Health Consent, and HIV consent. These columns mean:

1. **Opt-Out Date**: The patient has opted out of HealthInfoNet. All of their data is unavailable in the Clinical Portal *(see image label 3)*
2. **Mental Health Consent**: The patient has opted in to share their mental health data with participating providers *(see image label 4)*. All of their mental health data is globally available in the Clinical Portal. Please view Page 7 ("Access Mental Health Data") to learn more about accessing mental health data for patients that have not opted in
3. **HIV Consent**: Please note that HIV data is not available in the Clinical Portal at this time *(see image label 5)*

|		Last Name	First Name	MI	Date Of Birth	SEX	CITY	STATE	ZIP	Opt-out Date	Mental Health Consent	HIV Consent
		MOUSE	MINNIE	L	15-May-1928	F	RANDOLPH	ME	04346			
		MOUSE	MINNIE	J	22-May-1950	F	SKOWHEGAN	ME	04976			
		MOUSE	MINNIE		29-Aug-1925	F	PATTON	CA	92369	2015-09-17		
		MOUSE	MINNIE		11-Nov-1911	F	SACO	ME	04072			
		MOUSE	MINNIE	H	18-Aug-1989	Unk	BOSTON	MA	12345			
		MOUSE	MINNIE	M	20-Mar-1921	F	ORLANDO	FL	32818		2015-10-17	

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BREAK THE GLASS

Breaking the Glass allows HIN to log which users are viewing a specific patient's Personal Health Information (PHI), and for what reason.

The process to Break the Glass is as follows:
1. Choose a patient record to access
2. An "Access Sealed Patient" window will pop up
3. Click the drop down menu
4. Choose a reason that is most relevant to why you're entering the patient's record
5. Optional: A blank field will appear below where you can type in information about your choice *(please check with your organization's compliance/legal team for further information on preferences for what should be entered in this text field)*

When entering the record, the reasons you have to choose from include the following *(below - see image label 1)*.
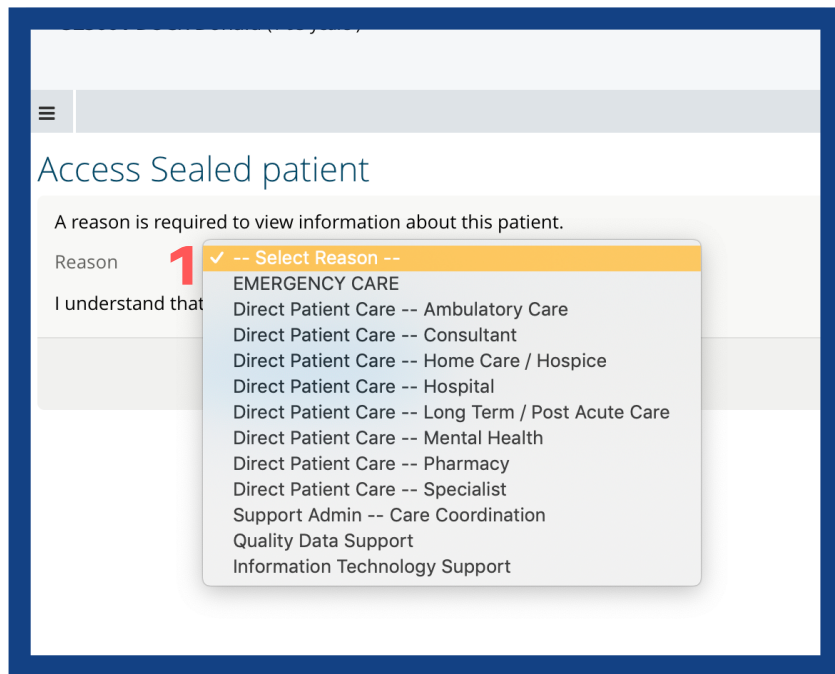
⚠️ **SAFETY DISCLAIMER:** HIN maintains an audit trail for all patient records accessed. The reason you provide for entering a record will be logged and may be audited.
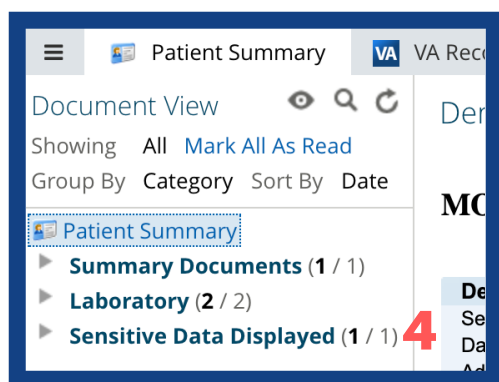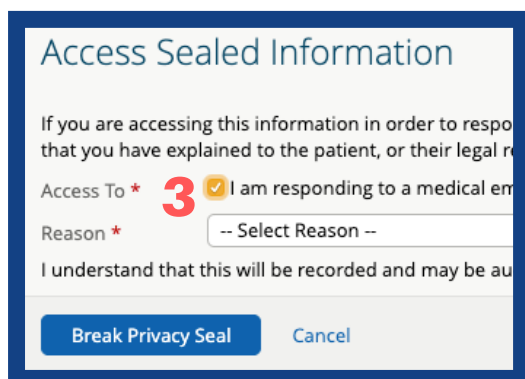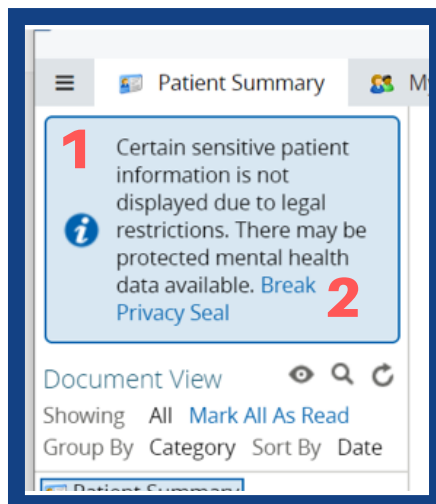
📝 **NOTE:** After a user Breaks the Glass, the record will be available for three days. After the three days is over, the Clinical Portal will prompt you to Break the Glass before viewing the record again.

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ACCESS MENTAL HEALTH DATA

You can view sensitive mental health data in the Clinical Portal from behavioral health organizations. HIN manages patient's consent options, including opt-in preferences for mental health data sharing. If a patient opts in, they have consented to share their mental health data globally in the Clinical Portal.

⚠️ **SAFETY DISCLAIMER:** In an emergency, or if a patient has given verbal permission, Maine state law permits health care professionals to access mental health data, regardless of global opt-in status.

HOW TO BREAK THE PRIVACY SEAL

1. Find the blue disclaimer box above the Document View that states: "Certain sensitive patient information is not displayed due to legal restrictions. There may be protected mental health data available." *(see image label 1)*
2. Click the link that says "Break Privacy Seal" *(see image label 2)*
3. An "Access Sealed Information" window will pop up; check the box indicating that you are responding to a medical emergency or have received verbal consent to view the data *(see image label 3)*
4. Choose a reason that is most relevant to why you're entering the patient's record
5. A blank field will appear below where you must type in information about your choice *(please check with your organization's compliance/legal team for further information on preferences for what should be entered in this text field)*
6. A "Sensitive Data Displayed" folder will become available under the Document View *(see image label 4)*

✏️ **NOTE:** Users can access the "Sensitive Data Displayed" folder for three days before it requires you to break the glass again to view the data.

⚠️ **SAFETY DISCLAIMER:** Please note that this mental health data is only available for the specific user that Breaks the Privacy Seal. Other users cannot view the data during the three day time period without also taking this action with their personal User ID.

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USER MANUAL

VIEW THE PATIENT SUMMARY

The Patient Summary gives you a detailed background on encounters other providers have had with a patient. After Breaking the Glass to view a patient's record, you will have access to the following data on the Patient Summary screen:

- Demographics
- Emergency Contact
- Primary Care Provider
- Allergies
- Active Problems
- Prescription Medications Dispensed within the Last 120 Days
- Encounter Visit History

⚠️ **SAFETY DISCLAIMER:** If a section has more data to display, a "Next" button will appear below the results box *(see image label 1)*. Click this button to view more data.

✪ **HELPFUL TIP:** To get back to the main menu, click the three horizontal lines in the top, left corner of the Patient Summary, next to the Patient Summary tab *(see image label 2)*.

ACCESS THE DOCUMENT VIEW

Users will see documents and results that a patient may have on file under the "Document View", located to the left of the Patient Summary.

To expand the contents of any Document View folder, single click on the triangle *(see image label 1)* and then single click a line item that displays below to view the document's enclosed data. Data available in these folders may include:

- Consultations
- Care Plans
- Discharge, History, and Physicals
- Hospital, ED, and Primary Care Office Visit Notes
- Immunizations
- Radiology, Microbiology, and Laboratory Results
- Summary Documents
- VA Continuity of Care Document Access
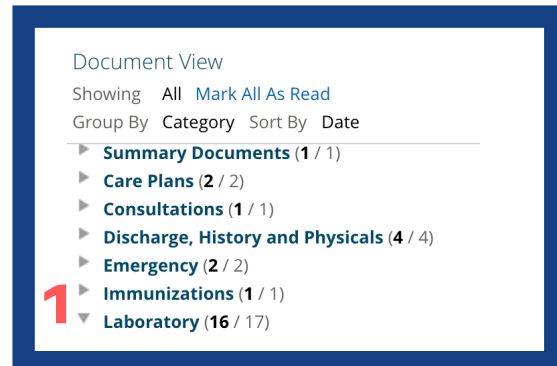
NOTE: Document View folders will differ patient-to-patient based on encounters and/or data that HIN receives from each organization.
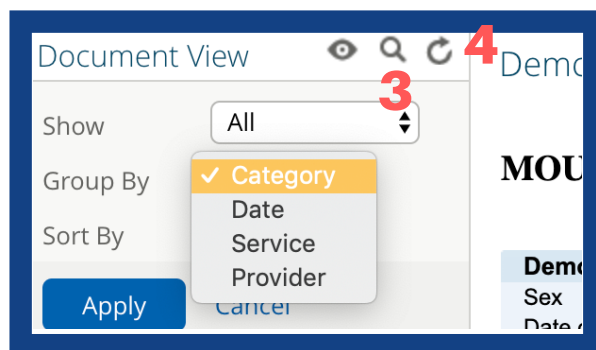
SORTING OPTIONS

To group documents by category, date, service location, or provider, the process is as follows:

1. Click the eye button *(see image label 2)*
2. Click the drop down menu next to "Group By"
3. Choose your preference
4. Press Apply
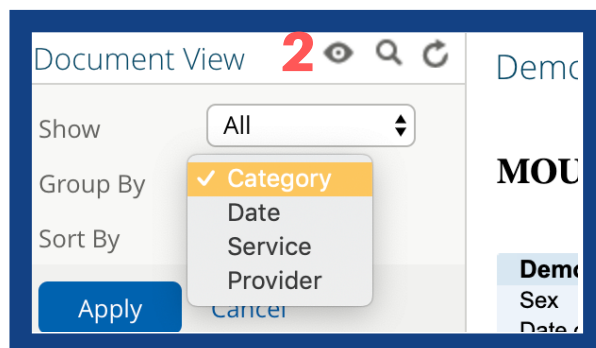
NOTE: The process for sorting documents is the same, except you choose the "Sort By" drop down menu, located below "Group By"

KEYWORD SEARCH FEATURE

To find a particular document or result quickly, users can search all documents by clicking the magnifying glass button *(see image label 3)* and typing in a keyword *(e.g., Colon - this will show all colonoscopy results)*.

HELPFUL TIP: You can refresh the Document View at any time by clicking the circular arrow button *(see image label 4)*

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ACCESS THE DOCUMENT VIEW [CONTINUED]

LABORATORY RESULTS

In the "Laboratory" folder, the results are color coded as follows:

- **Black** = all results are within the normal range
- **Yellow** = some results are in the abnormal range
- **Red** = some results are in the critical range

Reference ranges come from the resulting laboratory.

To graph results over time, the process is as follows:

1. Click a "Laboratory" folder result to view
2. Click "View Cumulative Results" link at the top of the window *(see image label 1)*
3. Check off the components you wish to chart *(in this example, Creatinine and Albumin are selected - see image label 2)*
4. Click the blue "Graph" button to display your formulated data *(see image label 3)*

HELPFUL TIP: A bolded folder means the user has not viewed the contents of that folder yet

CONNECT TO THE VA

HIN provides access to the Veteran's national EHR for patients that have consented to share their data through the VA.

You can retrieve VA Continuity of Care Documents by clicking the "VA Record Search" tab at the top of the Patient Summary screen *(see image label 1)*.
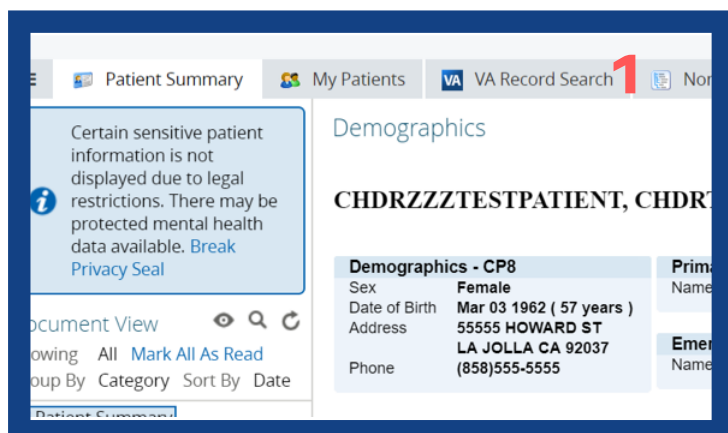
Once you've clicked the tab, follow the "VA Records Search Instructions" steps starting with the "Retrieve Document" button *(see image label 2)*.

You can monitor progress of document retrieval by viewing the status bar at the top of the window *(see image label 3)*.

Once the search is complete and documents have been retrieved, users will automatically see the document display on the screen.
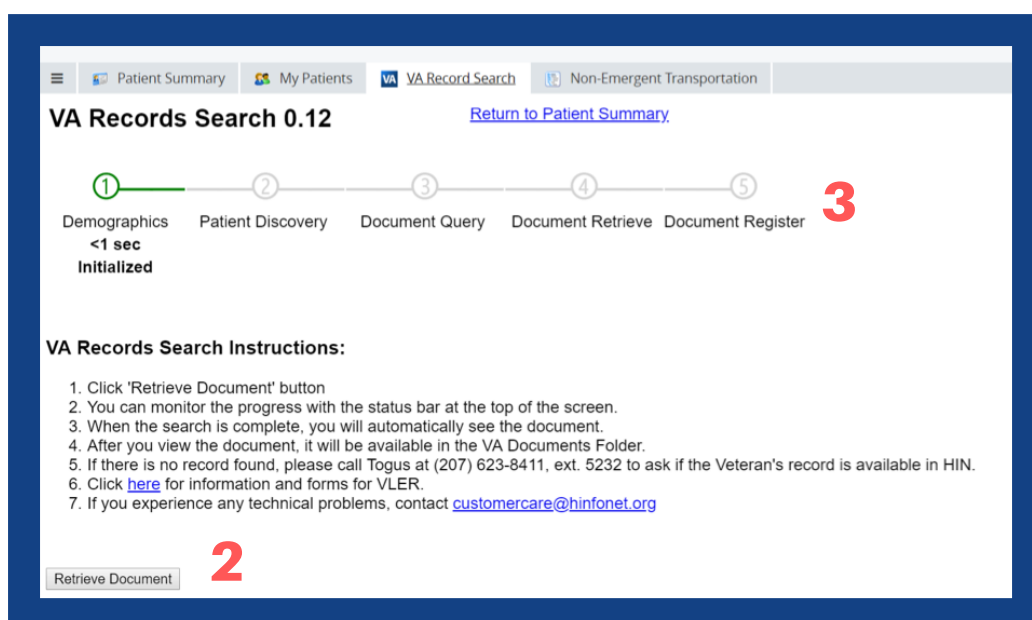
HELPFUL TIP: If users want to exit this document and view it later, it will also be available in the "Document View" under the folder labeled "VA Documents."

SAFETY DISCLAIMER: It's a good best practice to always query the VA Record Search to ensure you have the most up-to-date information available for your VA patient(s).
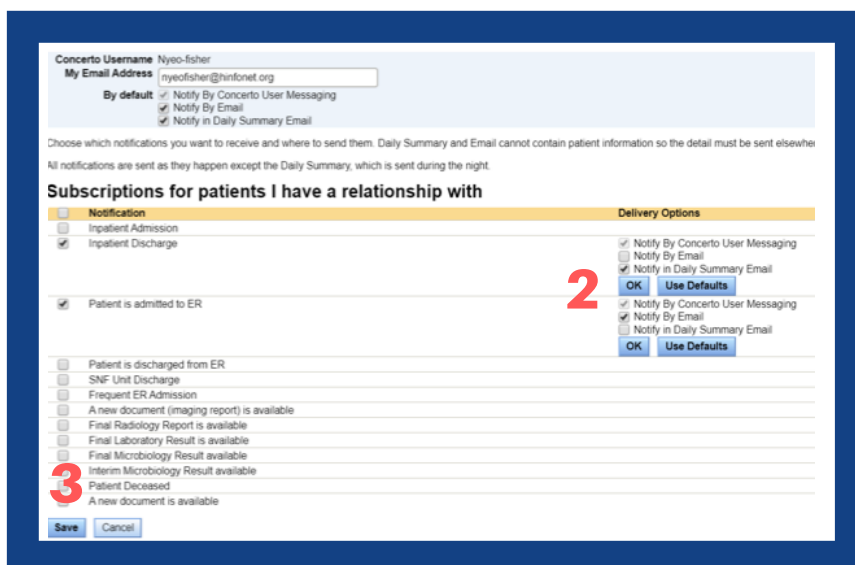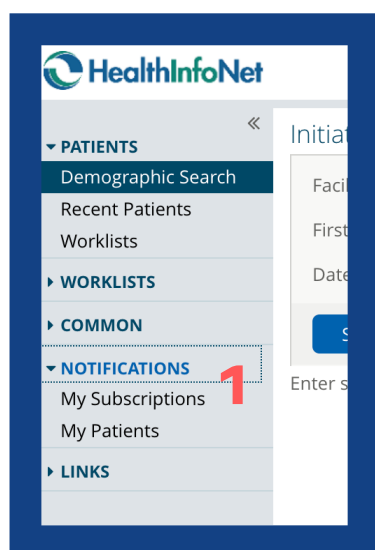
SET UP NOTIFICATIONS

MY SUBSCRIPTIONS

To make it easier to monitor your patients, HIN recommends setting up "Notifications", which will be sent to your email when an event of care occurs (e.g., a discharge from the hospital happens).

The types of events you can get Notifications for can be found in the "My Subscriptions" link *(see image label 1)* in the left-side menu under "Notifications." There are two delivery preference options for Notifications:

- **Real-time**: Notifications are sent throughout the day as soon as the event is logged in the Encounter Visit History
- **Daily Summary**: Notifications are sent once a day (in the morning) and contain all the activity from the previous day midnight-to-midnight

Once you've checked the boxes to specify your delivery preferences, click "OK" *(see image label 2);* then click "Save" *(see image label 3)* at the bottom of the screen.

HELPFUL TIP: You can choose to receive Notifications in real-time, in a daily summary email, or both. Choose which email preferences work best for your workflow.

To start receiving Notifications for patients, users need to add them to "My Patients" *(see page 11 for further details).*

SET UP NOTIFICATIONS [CONTINUED]

MY PATIENTS

Users can add patients to "My Patients" in one of three different ways:

Option #1 process is as follows:
1. Start by clicking on the "My Patients" link in the left side menu
2. Use the Demographic Search to search for a patient
3. Once the patient record is found, add them to your "My Patients" list by clicking the green check icon to the left of their name *(see image label 1)*
4. To remove a patient, click the red X icon to the left of their name *(see image label 2);* follow the prompts

Option #2 process is as follows:
1. Start in the Patient Summary
2. Click the "My Patients" tab at the top of the Patient Summary page *(see image label 3)*
3. Click "Add Relationship" to add a notification for this patient *(see image label 4)*

HELPFUL TIP: For option #3, a large amount of patients (e.g., excess of 100 patients) can be added to your "My Patients" list by contacting HealthInfoNet Customer Care team at **CustomerCare@hinfonet.org**. They will perform a bulk upload on your behalf.

SET UP NOTIFICATIONS [CONTINUED]

MANAGE NOTIFICATIONS

Users can receive Notifications for any patient during a specified time period.

To specify date ranges for your Notifications, the process is as follows:
1. Click the pencil icon next to the right of their name *(see image label 1)*
2. After the window appears, choose the end date you wish to stop receiving notifications; click "Submit"
3. To remove end dates for all patients, click the "Clear All End Dates" button *(see image label 2)*

NOTE: Users can view a list of Notifications from the last 30-days by clicking the "Show Notifications" button *(see image label 3)*.

HELPFUL TIP: Users can download a list of your Notifications from the last 30-days in a .CSV file by clicking "CSV" at the bottom of the screen on the left side *(see image label 4)*.

NOTE: A patient will remain on your My Patients list until you delete the relationship. This can be done by clicking the red X icon to the left of their name.

SET UP WORKLISTS

Worklists are used to categorize a certain group of patients you're following. You can access Worklists by clicking the "Worklists" link on the left side menu *(see image label 1)*.

HELPFUL TIP: When you click on "Worklists", you'll see they are labeled as colors *(see image label 2)*. Users can click "Rename" *(see image label 3)* to change the title of that Worklist and note the reason to watch these patients *(e.g., making the Worklist title INR or COPD)*.
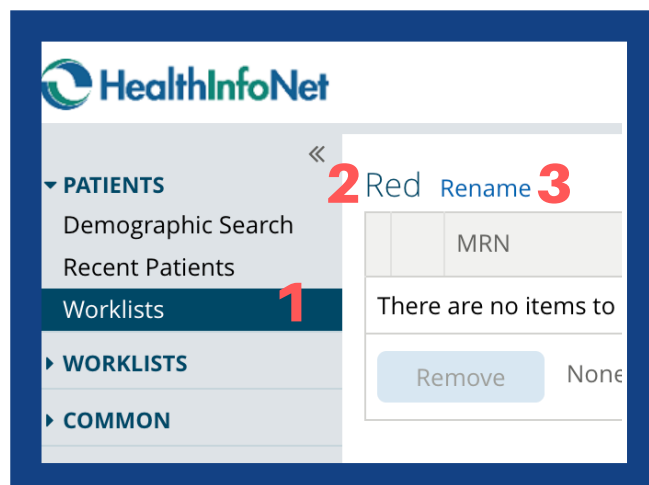
Users can add patients to Worklists in one of two different ways:

Option #1 process is as follows:
1. Start in the Patient Summary
2. Click the small plus sign button *(see image label 4)* in the top left corner; a drop down menu of Worklist options will appear
3. Choose which Worklist is the most appropriate for that patient to be added to
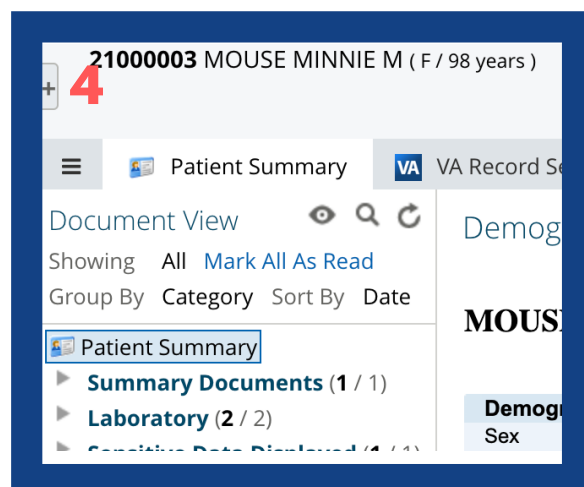
NOTE: Once a patient is added to a Worklist, the plus sign button will change color to reflect which Worklist the patient is now part of

Option #2 process is as follows:
1. Use the "Demographic Search" to search for a patient; a list of patients will appear with check boxes next to their names
2. Click the check box for the patient you want to add to your Worklist *(see image label 5)*
3. Scroll to the bottom of the page; click "Add Checked Results to Worklist" *(see image label 6)*; a drop down menu of Worklist options will appear
4. Choose which Worklist is the most appropriate for that patient to be added to

USER MANUAL
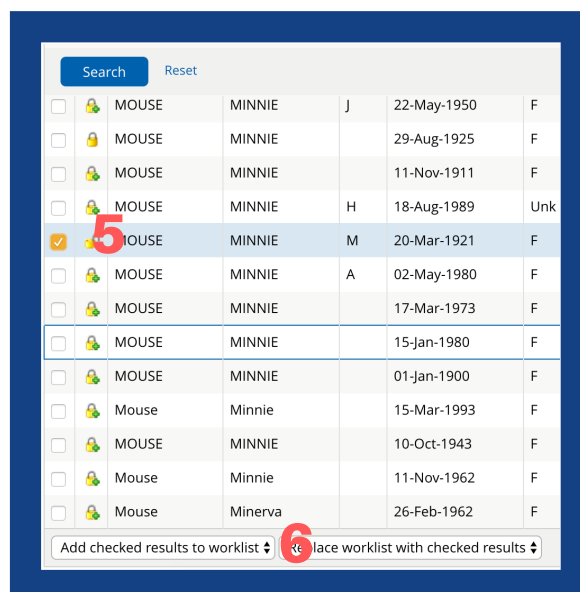
VIEW COMMUNITY SERVICES

The Community Services section of the Clinical Portal includes social determinants of health data sent to HIN from both clinical and non-clinical organizations.

The goal is to include data from community organizations that are providing services such as non-emergent transportation and housing support. As more community organizations are able to share data, it will be added to the Community Services tab.

Access Community Services by clicking the "Community Services" tab at the top of the Patient Summary *(see image label 1).* Non-emergent transportation data is available here.
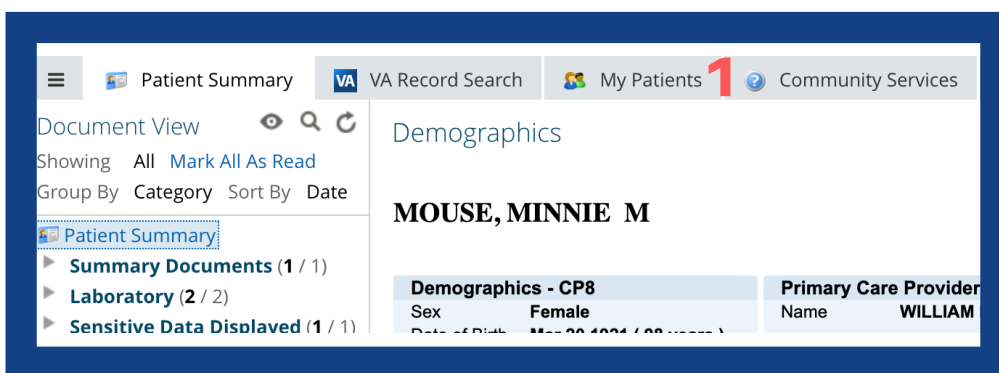
NOTE: The non-emergent transportation data that HIN receives is comprised of services provided and submitted to MaineCare via their claims system. HIN's goal is to show a patient's history of transportation services to help coordinate future needs *(example shown below - see image label 2)*

UTILIZE UPTODATE®

Users can utilize UpToDate® to make the best possible care decisions, as well as stay abreast on contemporary standards in clinical workflows. The information shown in the UpToDate® software is developed by more than 6,900 world-renowned physician authors, editors, and reviewers that use a rigorous editorial process to synthesize the most recent medical information into trusted, evidence-based recommendations.

You can now access UpToDate® through HIN by clicking on "Links" in the left side menu *(see image label 1)*.

NOTE: UpToDate® offers only basic information for non-subscribers. UpToDate® has several different types of subscription options available and you can view these in the UpToDate® window *(see image label 2)*.
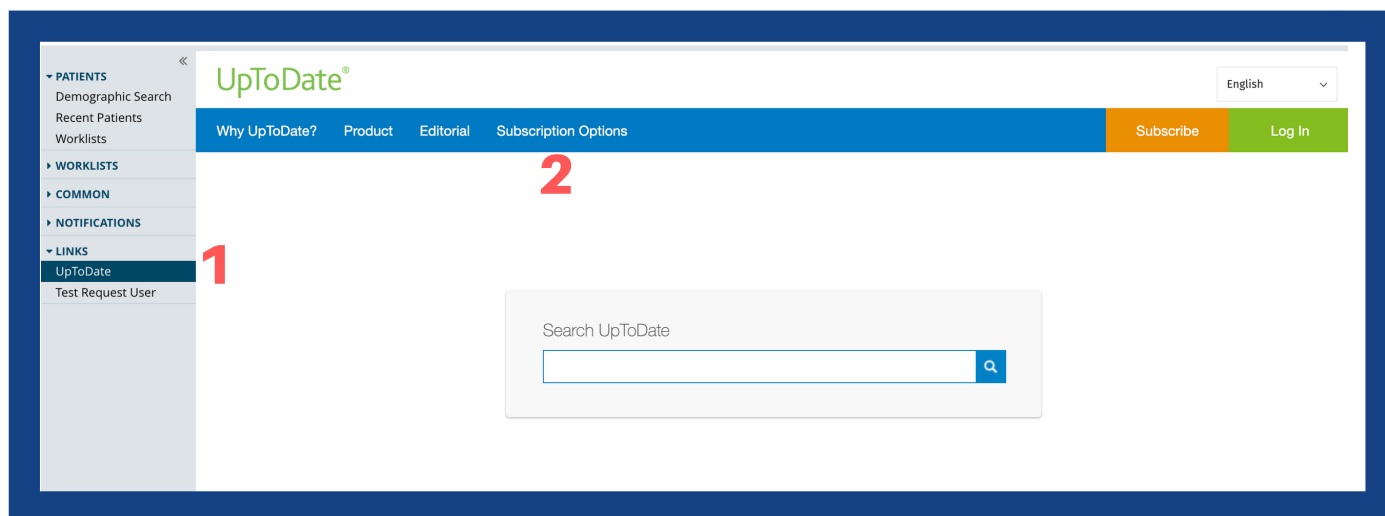
RESET USER PASSWORD

Users can reset their password themselves by setting up a Security Question.

NOTE: If you have already set your Security Question, please skip to the "Reset Password" instructions below. If you have not set your Security Question, **please contact your organization's Help Desk** to have your password reset, then refer to the "Set Up Security Question" instructions below.

SET UP SECURITY QUESTION

After your password reset has been requested, the process to set up a Security Question is as follows:

1. Login using the temporary password received
2. Click on "Common"
3. Click on "My Details"
4. Click "Change Security Question" *(see image label 1)*; a window will pop up
5. Choose a Security Question from the drop down menu; type in your answer and your temporary password *(see image label 2)*
6. Click "OK" *(see image label 3)*

RESET PASSWORD

After you've set your Security Question, the process to reset your password is as follows:

1. Click "Forgot your password?"
2. Enter User ID and click "Submit"
3. You will receive an email with a link to reset your password; click on the link in your email
4. In the new window, enter User ID, Security Question answer, and your preferred New Password
5. Confirm your password
6. Click "Change Password"

FREQUENTLY ASKED QUESTIONS

- **Who do I contact if I have additional questions?**
  - If you have a question about HIN's Clinical Portal, or would like to discuss additional training/education opportunities, please contact HIN's Client Education team at **ClientEducation@hinfonet.org**. One of our Clinical Educators will respond to your request in a timely manner
  - If you have an account-related question, please contact HIN's Customer Care team at **CustomerCare@hinfonet.org**

- **What do I do if I don't have a HealthInfoNet account?**
  - Please contact your IT department to receive assistance with setting up an account

- **What is your website?**
  - **www.hinfonet.org**

- **Where can I find which organizations are sharing data?**
  - Before you login to the Clinical Portal, you will see a link labeled "Click here to see data captured in HealthInfoNet" below the login field. Clicking this link will bring you to a comprehensive list of organizations sharing data with HealthInfoNet, as well as what kind of data they're sharing. This list is downloadable

- **How do I reset my password?**
  - Refer to page 17 for a detailed breakdown of how to reset a user password

- **Where can I find training materials?**
  - Materials (e.g., this User Manual and educational videos) are available on HealthInfoNet's website (**www.hinfonet.org**) in the "Training & Tools" section. The direct link is: **www.hinfonet.org/training-tools/**
  - You can also access all educational videos via HealthInfoNet's Training Academy. The direct link is: **www.hinfonetacademy.org**

- **What if I receive questions from patients about the Clinical Portal?**
  - Please visit the "Your Questions" section of our website to find detailed answers to common questions from patients. The direct link is: **www.hinfonet.org/patients/your-questions/**

USER MANUAL

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