User Guide
Clinical Portal

HealthInfoNet

Auditor User Role

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Welcome to the Clinical Portal

HealthInfoNet's Clinical Portal gives participating providers the ability to securely look up and retrieve real-time patient medical record information in a view-only screen at the point of care, greatly improving patient safety and care coordination activities.

PATIENT LOOKUP –The Clinical Portal allows providers to look up and retrieve real-time patient medical record information. Each patient's record is tailored to display available care management data relevant for a provider or care manager at the point of care. For more information on the types of data collected by the HIE, click here. Entry to the record is readily accessible, though audited closely for privacy and security purposes.

NOTIFICATION SERVICES – Real-time alerting of time-sensitive events like emergency room visits, critical lab results, and hospital discharges make it possible for care managers and other providers following a patient to intervene early and establish the right care plan. Email-based notifications can be configured, ensuring that critical patient care events trigger immediate follow-on action.

VA CONNECTION – Integrated with the Veterans Affairs (VA) Virtual Lifetime Electronic Record Health Information Exchange (VLER HIE) initiative, the Clinical Portal gives providers the opportunity to securely view and share health information from veterans' national health records. Clinical Portal users are able to easily connect to the VLER HIE system from within the user interface and download a VA Continuity of Care Document (CCD) for their patients.

COMMUNITY SERVICES – Within each patient's medical record is a "Community Services" section that includes available social determinants of health data sent to the HIE from both clinical and non-clinical organizations. The section incorporates data from participating community organizations that are providing non-clinical services that are applicable to clinical conversations, such as non-emergent transportation and housing support.

About this User Guide

This Clinical Portal User Guide has been created for the Auditor user role (Table 1). This user role has been designed to provide the appropriate self-service audit reporting functionality required for privacy/compliance officers and/or support staff to view both privacy and mental health information access audit logs demonstrating all of the patients that have been accessed by a particular user or all of the users that have accessed a particular patient over a given period of time.

Table 1. Auditor User Role Description

User Role	Description	Common Job Titles With User Role
Auditor	Access to audit reporting functionality only	• Privacy/Compliance Officer • Privacy/Compliance Support Staff

We're Here to Help

HealthInfoNet's Customer Support team is trained, experienced, and ready to work with you. If you have a question, we'll help find the answer. Reach out to us using the coordinates below and we'll be in touch shortly with more information.

Contact Us Directly

- **Hours**: Monday through Friday – 8am to 4:30pm ET
- **Phone**: 207-541-9250
- **E-mail**: customercare@hinfonet.org

Support at Your Facility

HealthInfoNet has trained a member of each participating organization to assist with support issues so that our users have a local resource. This is typically a member of your Help Desk or IT team. If this is an urgent request, you may decide to contact your local resource first.

Account Setup & Initial Login

Account Authorization

To obtain access to the Clinical Portal online user interface:

1. New users must contact the authorized Help Desk user who has been designated by their organization as the individual responsible for creating new user accounts.

    a. If the user's organization does not have an authorized Help Desk user, contact HealthInfoNet's Customer Support team at customercare@hinfonet.org.

2. Once the authorized Help Desk user, or HealthInfoNet's Customer Support team, has established the new user's account in the system, a welcome email will be sent to the new user with information on how to access the Clinical Portal interface.

Note: Welcome emails do not contain the new user's established User ID for security purposes. Help Desk users/HealthInfoNet's Customer Support team will follow-up separately on the system-generated welcome email to provide the new user with their designated User ID.

Initial Login Workflow

To log in to the Clinical Portal online user interface for the first time:

1. Follow the instructions in the welcome email and click the link to visit the Clinical Portal.

    a. Clinical Portal URL: https://maine.hinfonet.org/concerto/Login.htm

2. Once their browser has opened and the Clinical Portal login page has loaded, users can enter their designated User ID and temporary Password into the provided login fields.

3. Selecting the "Login" button will next prompt users to reset their temporary password to one of their own choosing and which meets the system's password complexity requirements.

    a. Note: New users will be required to reset their passwords for security purposes upon their first login and every 90 days thereafter.

4. Finally, new users will be required to accept the "Treatment Portal" and "Medication History" disclaimers upon their first login.

5. New users will then be approved to enter the portal.

Note: HealthInfoNet recommends that users set their account's "Security Question" upon logging in for the first time. Please see the section on "Password Reset Process" located at the end of this document for more information.

Landing Page

Upon logging in to the Clinical Portal, users will arrive to the online user interface's default landing page – "Privacy Log" view – with access to additional navigation options.

Core components featured on the landing page are outlined below (Figure 1).

Figure 1. User Interface Landing Page

Primary Workscreen – Based on the selected navigation, perform wanted actions

- Return to Landing Page
- View User Profile
- Portal Log Out

Primary Navigation
- **Monitoring –** Run privacy audit reports for system activity
- **Common –** Search and update user account profiles and settings
- **Links –** Run mental health access audit reports

Audit Report Services
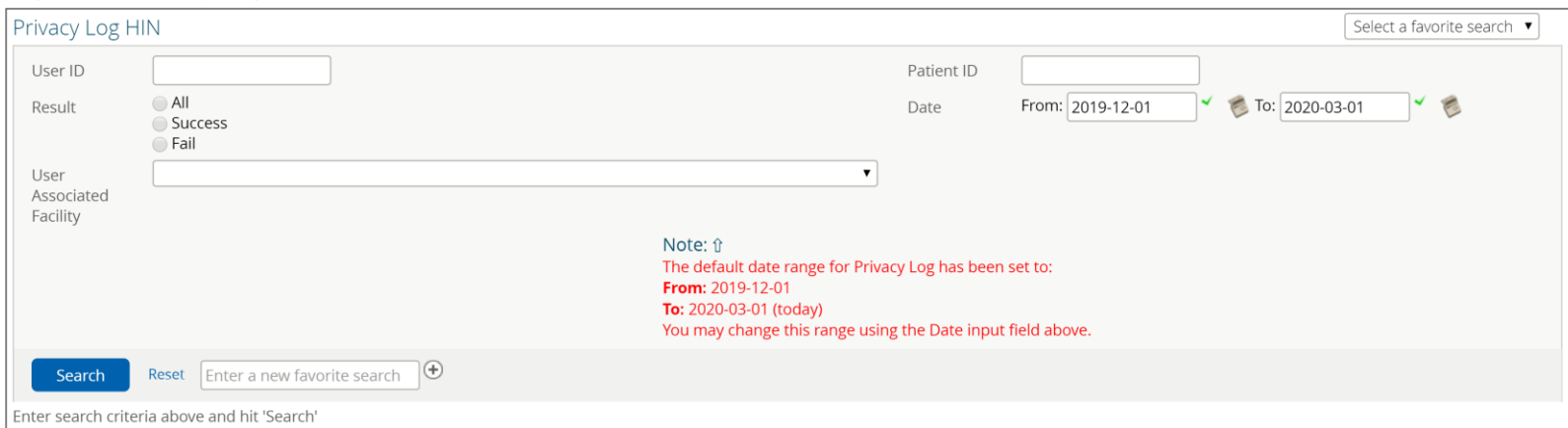
Privacy Log Function

Within the "Monitoring" main navigation function, located on the left-hand side of the screen, there is the ability for users to produce individual user and/or patient audit reports by selecting the "Privacy Log" option (Figure 2).

Figure 2. Privacy Log Option
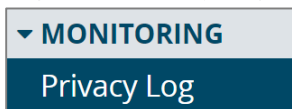
The "Privacy Log" search criteria will display, which users can populate to either audit all of the patients that have been accessed by a particular user (User ID, User Associated Facility) or all of the users that have accessed a particular patient (Patient ID) over a given period of time (Date To/From) (Figure 3). When ready, users can select the "Search" button to retrieve results.

Figure 3. Privacy Log Search Function

Privacy Log Search

When results return, the report will provide high-level audit activities meeting the entered search criteria (Figure 4).

Key fields included in the privacy audit report include the following:

1. **User Details** – The name of the user, as well as their system identifier, role, and associated facility

2. **Patient Details –** The name and unique identifier of the patient(s) accessed by the user

3. **Date/Time** – The timestamp indicating when the user accessed the patient's record, as well as the corresponding system session and event identifiers

4. **Note** – The comment provided by the user when breaking the privacy seal to the patient's record

Figure 4. Privacy Log Search Results

Time	User ID	User Name	User Role	User Associated Facility	Patient ID	Patient Name	Session ID	Event ID	Reason	Note
31 Dec 2019 15:26			Clinician - Administrative	HealthInfonet	1359761		o5JXDyfICVhui3PX8ne-jA	556142092	Information Technology Support	
31 Dec 2019 15:17			Clinician - Administrative	HealthInfonet	302884		o5JXDyfICVhui3PX8ne-jA	556140475	EMERGENCY CARE	
31 Dec 2019 15:17			Clinician - Administrative	HealthInfonet	302884		o5JXDyfICVhui3PX8ne-jA	556140446	Direct Patient Care -- Long Term / Post Acute Care	
31 Dec 2019 15:17			Clinician - Administrative	HealthInfonet	090-14-10		o5JXDyfICVhui3PX8ne-jA	556140423	EMERGENCY CARE	
31 Dec 2019 15:10			Clinician - Administrative	HealthInfonet	000375757		o5JXDyfICVhui3PX8ne-jA	556137805	EMERGENCY CARE	

Privacy Log Detailed Views

By selecting an individual record in the initial audit report, users will be brought to a more detailed log displaying all related views and functions that the selected user engaged in when viewing the selected patient's record (Figure 5).

Figure 5. Privacy Log Detailed Activities View

Time	User ID	Event Type	Message	Patient ID	Patient Name	Event ID	User Name	User Associated Facility
31 Dec 15:26		Privacy Override		1359761	TESTING ABIGAIL L	556142092		HealthInfonet
31 Dec 15:26		Context Change	Patient	1359761	TESTING ABIGAIL L	556142091		HealthInfonet
31 Dec 15:26		Open Application	Orion - Dynamic Patient Summary, Dynamic Patient Summary	1359761	TESTING ABIGAIL L	556142093		HealthInfonet
31 Dec 15:26		Open Application	Orion - Dynamic Patient Summary, Patient Summary	1359761	TESTING ABIGAIL L	556142094		HealthInfonet
31 Dec 15:26		Open Application	Orion - Problems, Active Problems	1359761	TESTING ABIGAIL L	556142099		HealthInfonet

By selecting an individual record in the detailed audit report, users will be brought to an even more detailed record of the selected activity, including audit event parameters (Figure 6).

Figure 6. Privacy Log Individual Activity Record

Parameter List

ID	556142093	**Start Time**	12-31-2019 15:26
Type	Open Application	**Source**	Concerto
Message	Orion - Dynamic Patient Summary, Dynamic Patient Summary		
Result	Success		
Patient ID	1359761	**Patient Name**	TESTING ABIGAIL L
Session ID	o5JXDyflCVhui3PX8ne-jA	**Terminal ID**	172.16.221.22
User ID		**Patient ID Type**	Patient.Id.MRN

Audit Event Parameters

Name	Value
Clinical Portal Session ID	BEE093F7-AF1F-46D8-9A16-DB6A8576516B
ConcertoAccount	C9836F5B-8428-4755-92D5-C742699DC77C
Patient.Co.AliasName	EMMC_MD TESTING
Patient.Co.DateTimeOfBirth	19700003

Mental Health Access Audit Function

In addition to the general privacy log function, there exists the ability for users to produce mental health access audit reports. To do so, users can select the "Mental Health Access Audit" option within the "Links" main navigation function, located on the left-hand side of the screen (Figure 7).

Figure 7. Mental Health Access Audit Option
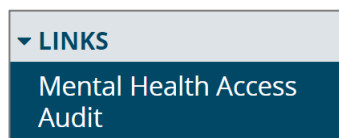
The "Mental Health Access Audit" search criteria will display, which users can populate to either audit all of the mental health information (per patient) that has been accessed by a particular user (User ID, User Associated Facility) or all of the users that have accessed a particular patient's mental health information (Patient MRN, Patient Site) over a given period of time (Date To/From) (Figure 8). When ready, users can select the "Search" button to retrieve results.

Figure 8. Mental Health Access Audit Search Function

Mental Health Access Audit Search

When results return, the report will provide high-level audit activities meeting the entered search criteria (Figure 9).

Key fields included in the mental health audit report include the following:

1. **User Details** – The system identifier and associated facility of the user

2. **Patient Details** – The unique identifier and facility of the patient(s) accessed by the user

3. **Date** – The date indicating when the user accessed the patient's mental health information

4. **Comment** – The comment provided by the user when breaking the mental health access privacy seal to the patient's mental health information

5. **Details** – A hyperlink to a more detailed log displaying additional audit information

Figure 9. Mental Health Access Audit Search Results

User ID	User Associated Facility	Date	Patient Site	Patient MRN	Reason	Comment	Details
	HealthInfonet	12/31/2019	MCHS	302884	EMERGENCY CARE	No comment entered.	Details
	HealthInfonet	09/11/2019	MCHS	410608	EMERGENCY CARE	No comment entered.	Details
	HealthInfonet	08/30/2019	MCHS	302884	Direct Patient Care -- Ambulatory Care	No comment entered.	Details
	HealthInfonet	08/01/2019	PCHC	18822	Direct Patient Care -- Home Care / Hospice	No comment entered.	Details
	HealthInfonet	07/22/2019	PCHC	18822	Direct Patient Care -- Ambulatory Care	No comment entered.	Details
	HealthInfonet	07/22/2019	YORKH	000288333	Direct Patient Care -- Ambulatory Care	No comment entered.	Details
	HealthInfonet	07/22/2019	MGH	090-14-10	Direct Patient Care -- Ambulatory Care	No comment entered.	Details

Mental Health Access Audit Detailed Views

By selecting the "Details" hyperlink in an individual record in the initial audit report, users will be brought to a more detailed log displaying all related views and functions that the selected user engaged in when viewing the selected patient's mental health information (Figure 10).

Figure 10. Privacy Log Detailed Activities View

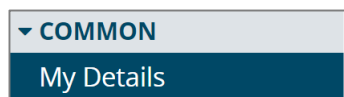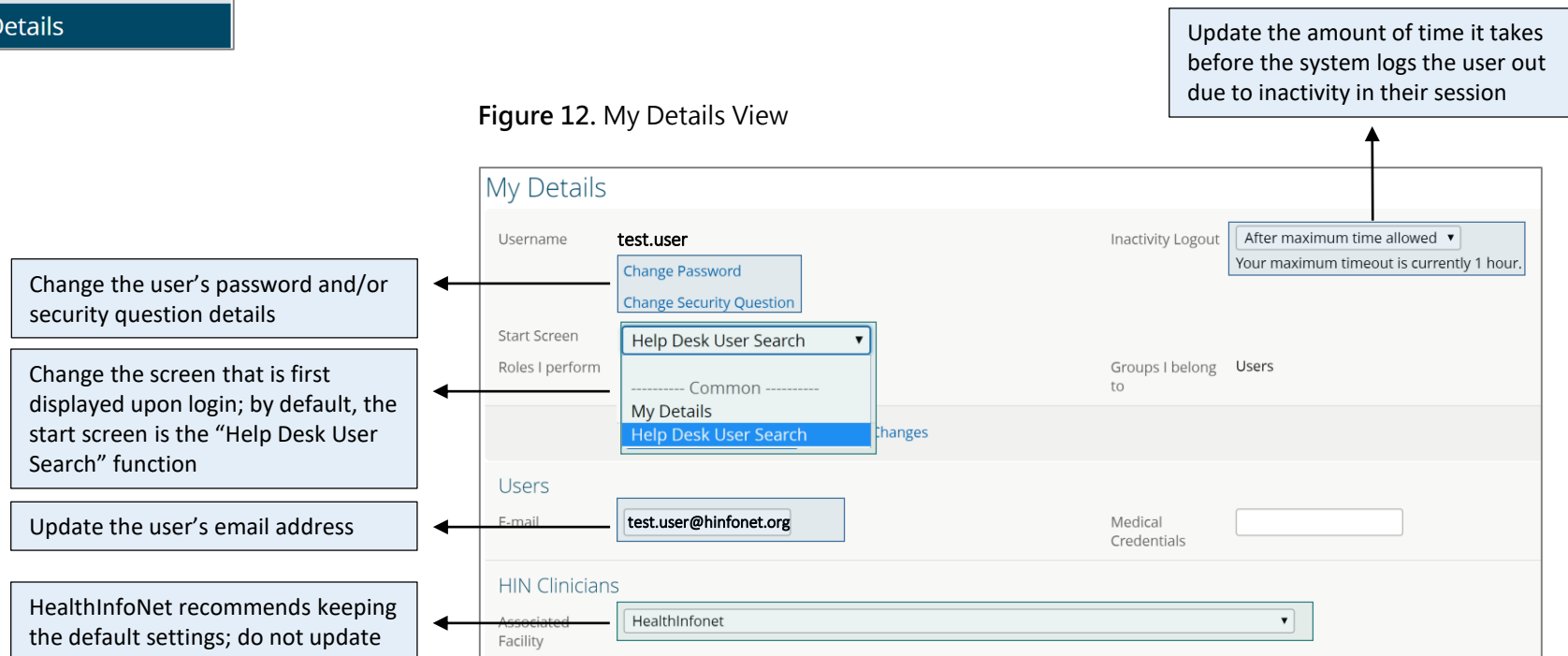| Time	Entry Point
2019-12-31 15:38:45	Dynamic Patient Summary
2019-12-31 15:38:45	Patient Summary
2019-12-31 15:38:45	Demographics
2019-12-31 15:38:45	Active Problems
2019-12-31 15:38:45	HIN_Medications
2019-12-31 15:38:45	Allergies - Secured
2019-12-31 15:38:45	Encounter/Visit History - SECURED
2019-12-31 15:35:00	Results Viewer Frames
2019-12-31 15:35:00	Results Viewer Frames
2019-12-31 15:35:00	Single Laboratory Result

User Account Services

My Details

Within the "Common" main navigation function, located on the left-hand side of the screen, there is the ability for users to configure their user account settings by selecting the "My Details" option (Figure 11).

Important functionality in the "My Details" view for users to review and consider are outlined below (Figure 12).

Figure 11. My Details Option

Figure 12. My Details View

- Change the user's password and/or security question details
- Change the screen that is first displayed upon login; by default, the start screen is the "Help Desk User Search" function
- Update the user's email address
- HealthInfoNet recommends keeping the default settings; do not update
- Update the amount of time it takes before the system logs the user out due to inactivity in their session

Additional Features & Functionality

Quick Navigation Functionality

In the upper-right hand corner of the Clinical Portal is the system's "Quick Navigation" functionality. Core components featured in the functionality are outlined below (Figure 13).
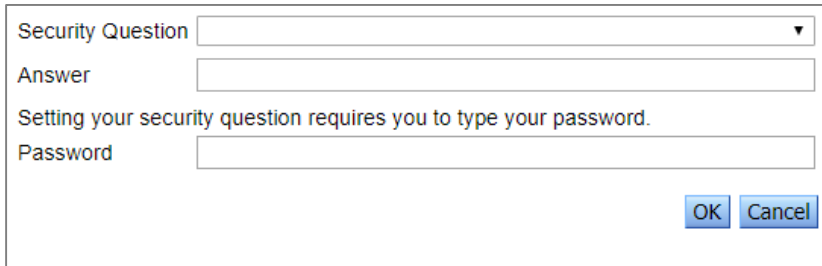
Figure 13. User Toggle Drop-Down View

Return to the user's default start screen

Log out of the Clinical Portal when finished with each session

- **User Settings** – Quickly navigate to the user's "My Details" view
- **Help** – Search for features/functionality within the Clinical Portal's system help guide
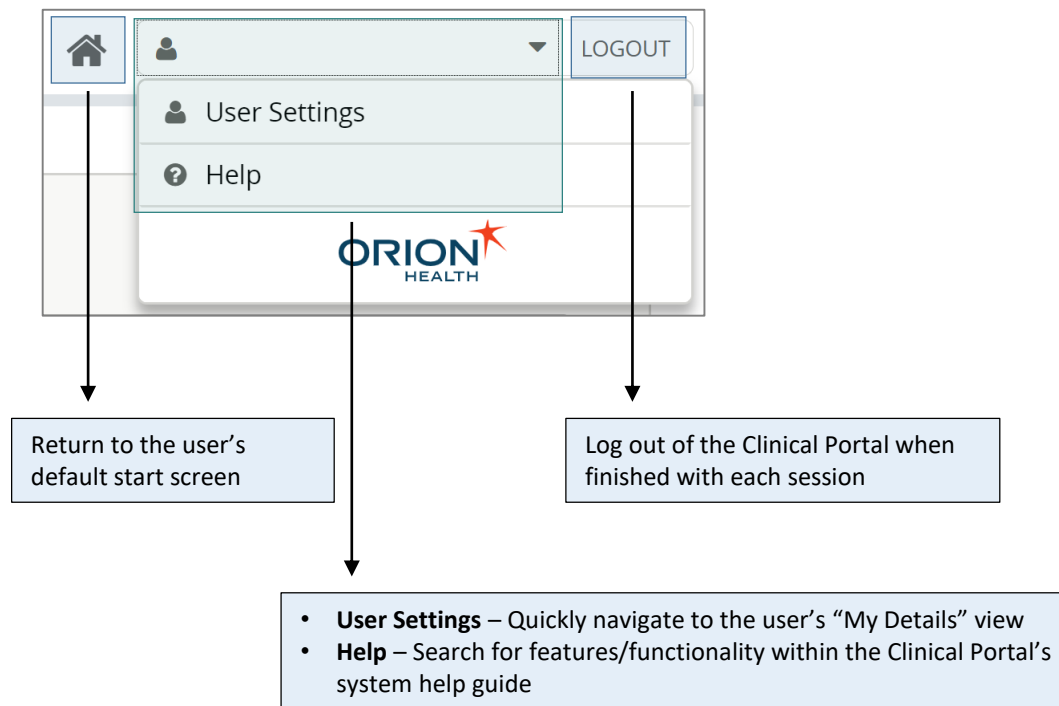
Password Reset Process

In order for users to be able to reset their passwords, they must proactively set a Security Question for their account. To do so, users can visit the "My Details" option within the "Common" main navigation function and select the "Set My Security Question" link (Figure 14).

Figure 14. Security Question Window

Security Question	▼
Answer	
Setting your security question requires you to type your password.	
Password	
	OK Cancel

As long as they have a Security Question set, users will be able to use the "Forgot your password" link located on the portal's login screen to receive instructions to their email on how to reset their password (Figure 15).

Figure 15. Forgot Your Password Link

? Forgot your password?
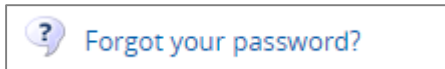
If users are not able to reset their own password, they can contact their organization's Help Desk user or HealthInfoNet's Customer Support team for assistance.

Clinical Education & Training Opportunities

- In-person and online trainings available for all services; contact clienteducation@hinfonet.org for more information

- Public resources available at https://hinfonet.org/resources/clinical-education/

- HealthInfoNet's online training site also provides courses and CNE credits to better understand and effectively use the HIE; visit http://hinfonetacademy.org/ for more information

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