User Guide Clinical Portal



Clinician User Role IS Support 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, <u>click here</u>. 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) <u>Virtual Lifetime Electronic Record Health</u> <u>Information Exchange (VLER HIE)</u> 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.



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: <u>customercare@hinfonet.org</u>

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



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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 <u>customercare@hinfonet.org</u>.
- 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 <u>not</u> 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: <u>https://maine.hinfonet.org/concerto/Login.htm</u>
- 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.



Data Coverage Report

On the login page is a link that brings users to a "Data Coverage" report identifying HealthInfoNet's current provider connections and the data types those providers are sending (Figure 1).

Please en	iter your user ID and password
User ID	
Password	
?	Forgot your password?
	Login
HIN Pr	oduction Environment
Click here to s	see data captured in HealthInfoNet

The "Data Coverage" report is an important tool for users when trying to understand the type and completeness of data presented on their patients in the Clinical Portal.

Report URL: <u>https://maine.prod.hinfonet.org/static/HealthInfoNet_data_Coverage.pdf</u>





Landing Page

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

Core components featured on the landing page are outlined below (Figure 2).

C HealthInfoNet		LOGOUT
✓ PATIENTS	Initiate Search	
Demographic Search Recent Patients Worklists • WORKLISTS	Facility MRN First Name Last Name Date Of Birth Imodel	
COMMON NOTIFICATIONS LINKS	Search Reset Enter search criteria above and hit 'Search'	
↓ [Primary Workscreen – Based on the selected navigation, perform wanted actions • 	Return to Landing Page View User Profile
 Primary Navigatio Patients – Searce Worklists – Organismo – Update Notifications – Organismo – Organis	• n and view individual patient records nize and monitor patients of interest ate user account profile and settings configure notification services for specific patient panels	Portai Log Out

Figure 2. User Interface Landing Page

• Links – Access additional value-add resources





Patient Lookup Services



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Search & View Individual Patient Records

Within the "Patients" main navigation function, located on the left-hand side of the screen, there are three options designed to help users to search and view individual patient records (Figure 3):

- 1. Demographic Search Search for new patients
- 2. Recent Patients Find previously searched patients
- 3. Worklists Organize and monitor user-specific patient panels over time

Figure 3. "Patients" Function Menu

PATIENTS
Demographic Search
Recent Patients
Worklists



Demographic Search

Users can select the "Demographics Search" option from the "Patients" function to search for new patients (Figure 4). Simply enter the appropriate combination of demographic information for the wanted patient and initiate the search to generate results. Required combinations include:

- 1. First Name + Last Name [recommended]
- 2. Last Name + Date of Birth
- 3. Facility + Medical Record Number (MRN)

When the appropriate information has been entered, select the "Search" button to retrieve results.

Figure 4. Demographics Search Criteria

nitiate Search						
Facility		MRN				
First Name		Last Name				
Date Of Birth		ZIP				
Search Reset						
Enter search criteria abov	e and hit 'Search'					



Demographic Search (cont.)

When results from users' demographic search return, there may be more than one patient that meets the provided search criteria. To confirm that the correct patient is selected, users can review the demographic details associated with each resulting record (Figure 5).

Fields included in the search results view include the following:

- 1. Name The patient's first name, middle name initial, and last name
- 2. Date of Birth The patient's date of birth (dd-mmm-yyyy)
- 3. Sex The patient's sex (male (M), female (F), unknown (U))
- 4. Location The patient's physical location (city, state, ZIP code)
- 5. Consent Information The patient's consent choices for sharing general medical, mental health, and HIV information

Figure 5. Demographic Search Results

Sea	Search Reset										
]	Last Name	First Name	MI	Date Of Birth	SEX	CITY	STATE	ZIP	Opt-out Date	Mental Health Consent	HIV Consent
6	DEMO	HINTEST		09-Jul-1948	F	PORTLAND	ME	04103			
6	Hintest	Demo		11-Sep-1952	м	Portland	ME	04103			
Add ch	ecked results to worklist	Replace worklist with	checked re	sults 🔻							



Patient Consent Choices

In the State of Maine, the following patient consent choices are in place:

- 1. General Medical Information Patients' general medical information is automatically sent to HealthInfoNet unless individual patients decide to **opt-out** of sharing their information.
- 2. Mental Health Information Patients' mental health information is <u>not</u> sent to HealthInfoNet unless individual patients decide to **opt-in** to sharing their information.
- 3. HIV Information Patients' HIV information is <u>not</u> automatically sent to HealthInfoNet unless individual patients decide to **opt-in** to sharing their information.
 - a. At this time, HealthInfoNet is not displaying any patients' HIV information in the portal.



Recent Patients

For users that have previously viewed individual patient records, the "Recent Patients" option located in the "Patients" function provides a history of their recently viewed patients (Figure 6). Categorized by when the patient record was last accessed, users can easily identify and enter recurring records.

Figure 6. Recent Patients View

Las	t 7 [Days						
		MRN	Name	₽				
	6	HINMMC	HINTEST, Demo	-				
	6	DEMOHINTEST	DEMO, HINTEST	-				
	Remove None selected							
Sho	wing 2	2 of 2						



Worklists

For users that have previously organized their patients into quick-filter categories of their own choosing, they can select the "Worklists" option located in the "Patients" function to view saved patient records (Figure 7).

Figure 7. Worklist View

Hig	High-Risk Patients Rename								
		MRN	Name	SEX	Age	₽			
	8	HINMMC	HINTEST, Demo	М	67 years	-			
	Remove None selected								
Shov	ving 1	l of 1							
Му	Pati	ent Panel Rena	me						
		MRN	Name	SEX	Age	₽			
	🗐 🕑 2127594 TESTING, ABIGAIL F 73 years -								
Remove None selected									
Shov	ving 1	l of 1							

Notes:

- More information follows in this user guide on how to create worklists and add patients to them.
- Each worklist can only contain up to 50 patients.



Patient Record Access Request

After selecting an individual patient record of interest to view from the "Demographics Search," "Recent Patients," or "Worklists" views, users are required to denote the reason why they have a need to access the patient's health information (<u>Figure 8</u>). This process of "breaking the privacy seal" allows HealthInfoNet to audit user activity on an individual patient-record basis for privacy purposes.

To break the glass on an individual patient's health information record, users must:

- 1. Select a "Reason" from the drop-down menu indicating why there is a need to access the record.
- 2. Provide "Additional Information" about the request that expands on the selected reason.
- 3. Once the above two fields have been populated, click on the "Break Privacy Seal" button located at the bottom of the window to enter the patient's record.

5		
Access Sealed patient		EMERGENCY CARE
		Direct Patient Care – Ambulatory Care
A reason is required to view information about this patient.		Direct Patient Care – Consultant
Reason	· · · · · · · · · · · · · · · · · · ·	Direct Patient Care – Home Care / Hospice
		Direct Patient Care – Hospital
Additional		Direct Patient Care – Long Term / Post Acute Care
mormation		Direct Patient Care – Mental Health
		Direct Patient Care – Pharmacy
		Direct Patient Care – Specialist
	A	Support Admin – Care Coordination
l understand that this will be recorded and may be audited.		Quality Data Support
,		Information Technology Support
Break Privacy Seal Cancel		

Figure 8. Break Privacy Seal Form





Patient Record Services



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Patient Summary View

Once users "break the privacy seal" for an individual patient's record, they will have unlimited access to the record for the next three (3) days, after which they will need to request access again.

Upon entering the record, users will be brought to the "Patient Summary" view, which provides detailed medical information about the selected patient.

Core components featured in the "Patient Summary" view are outlined below (Figure 9).





Mental Health Access Privacy Seal

In addition to their general medical health information, users can request access to the selected patient's sensitive mental health information within the "Patient Summary" view by selecting the additional "Break Privacy Seal" hyperlink located in the upper-left hand corner of the view (Figure 10).

To break the glass on an individual patient's mental health information record, users must:

- 1. Acknowledge that they are authorized to have "Access To" the patient's sensitive information for emergency purposes or have received verbal authorization from the patient.
- 2. Select a "Reason" from the drop-down menu indicating why there is a need to access the record.
- 3. Provide "Additional Information" about the request that expands on the selected reason.
- 4. Once the above two fields have been populated, click on the "Break Privacy Seal" button located at the bottom of the window to display the sensitive information in the record.





Clinical Summary – Demographics

In the upper-left hand corner of the "Patient Summary" view is the "Demographics" component (<u>Figure 11</u>). This component provides additional demographic information about the selected patient, including their Full Name, Sex, Date of Birth, Physical Address, and Phone Number, as well as their designated Primary Care Provider and Emergency Contact if available.

Figure 11. Demographics Component

Demographics						
Hintest, Demo						
Demographics - CP8	Primary Care Provider					
Sex Male	Name	CLAXTON EDMUND V JR				
Date of Birth Sep 11 1952 (67 years)						
Address 125 PRESUMPSCOT ST						
Portland ME 04103	Emergency Contact					
Phone (207)541-1952	Name	CATHY ADMTEST				



Clinical Summary – Allergies

In the upper-right hand corner of the "Patient Summary" view is the "Allergies" component (Figure 12). This component provides a list containing all of the selected patient's allergies.

Fields included in the "Allergies" component include the following:

- 1. **Details** The name/description of the patient's allergy
- 2. Reaction The patient's specific reaction to the allergy
- 3. Severity The severity of the patient's reaction to the allergy
- 4. Date Entered When the allergy was last recorded by the patient's provider
- 5. Location The location of the provider who last recorded the patient's allergy

Allergies							
Details	Reaction	Severity	Date Entered	Location*			
lodine			10/04/2013	SJH			
lodinated Contrast Media - IV Dye	Hives		10/04/2013	SJH			
Azithromycin	HIVES	MI	09/09/2011	CARY			
ALTEPLASE	RASH	Severe	03/07/2011	EMHS			

Figure 12. Allergies Component



Clinical Summary – Active Problems

Beneath the "Demographics" component is the "Active Problems" component (Figure 13). This component provides a list containing all of the selected patient's active diagnoses.

Fields included in the "Active Problems" component include the following:

- 1. Code The ICD-10 or SNOMED code corresponding to the patient's diagnosis
- 2. Description The ICD-10 or SNOMED description corresponding to the patient's diagnosis
- 3. Onset Date When the diagnosis was recorded by the patient's provider
- 4. Location The facility of the provider who recorded the patient's diagnosis

Active	Active Problems									
Code	Description	Status	Onset Date	Location*						
784.0	Headache		01/29/2013	WSFP						
787.1	Heartburn		01/29/2013	WSFP						

Figure 13. Active Problems Component



Clinical Summary – Medication Management

Beneath the "Active Problems" component is the "Medication Management" component (Figure 14). This component provides a list containing all of the selected patient's prescription medications dispensed within the last 120 days.

Fields included in the "Medication Management" component include the following:

- 1. Date Dispensed When the patient's prescription was dispensed
- 2. Drug Name The name/description of the patient's prescription
- 3. Dose / Quantity / Refill The dosage, quantity, and refill amounts for the patient's prescription
- 4. Prescribed By / Pharmacy The provider who prescribed the patient's prescription and the pharmacy where the prescription was dispensed to the patient
- 5. Instructions Any additional notes about the patient's prescription

Note: Medication information currently is provided from pharmacy data. If the table is empty upon initial loading, users should refresh their browser for it to load appropriately.

Figure 14. Medication Management Component

Prescription Medications D	Prescription Medications Dispensed within Last 120 Days												
Date Dispensed	Drug Name	Dose	Qty	Refill	Prescribed By	Pharmacy	Instructions						
01/15/2015	ATENOLOL 50 MG		90	3	Andrews, Robert	CVS	Take one pill twice daily						
01/15/2015	LISINOPRIL 10 MG		90	3	Smith, Mary	WALGREENS	Take once daily						



Clinical Summary – Encounters/Visit History

Beneath the "Medication Management" component is the "Encounters/Visit History" component (Figure 15). This component provides a list containing all of the selected patient's encounters/visits over time. Note: Users can hover over values in asterisk (*) fields to view more information.

Fields included in the "Encounters/Visit History" component include the following:

- 1. Admission / Discharge When the patient was admitted and discharged for the encounter
- 2. Visit Type / Service The type of visit (e.g., IP, OP, ED) and specific service for the encounter
- 3. Chief Complaint The patient's chief complaint for the encounter
- 4. Clinician The provider who saw the patient for the encounter
- 5. Dx Category / Dx Code / Px Code The diagnosis category and diagnosis and procedure codes recorded for the encounter
- 6. Insurance Type The type of insurance held by the patient at the time of the encounter
- 7. Location The facility of the provider who saw the patient for the encounter

Figure 15. Encounters/Visit History Component

ncounter/Visit History												
Discharge	Visit Type	Service	Chief Complaint	Clinician	Dx Category*	Dx Code*	Px Code*	Insurance Type*	Location*			
	Outpatient	Medical Service		PHYSICIAN, GENERIC GENERI	800-999.99	822.1	27524		MMC			
	Emergency	EMERGENCY ROOM		MARIAN BENNER					SJH			
D	History	History Ischarge Visit Type Outpatient Emergency	History ischarge Visit Type Service Outpatient Medical Service Emergency EMERGENCY ROOM	History ischarge Visit Type Service Chief Complaint Outpatient Medical Service Emergency EMERGENCY ROOM	History ischarge Visit Type Service Chief Complaint Clinician Outpatient Medical Service PHYSICIAN, GENERIC GENERi Emergency EMERGENCY ROOM MARIAN BENNER	History ischarge Visit Type Service Chief Complaint Clinician Dx Category* Outpatient Medical Service PHYSICIAN, GENERIC GENERI Emergency EMERGENCY ROOM MARIAN BENNER	History ischarge Visit Type Service Chief Complaint Clinician Dx Category* Dx Code* Outpatient Medical Service PHYSICIAN, GENERIC GENERi Emergency EMERGENCY ROOM MARIAN BENNER	History ischarge Visit Type Service Chief Complaint Clinician Dx Category* Dx Code* Px Code* Outpatient Medical Service PHYSICIAN, GENERIC GENERi Emergency EMERGENCY ROOM MARIAN BENNER	History ischarge Visit Type Service Chief Complaint Clinician Dx Category* Dx Code* Px Code* Insurance Type* Outpatient Medical Service PHYSICIAN, GENERIC GENERI Emergency EMERGENCY ROOM MARIAN BENNER			



Document View

To supplement the information located in the "Patient Summary" view, each patient's record also includes a "Document View" component (Figure 16). This component, located along the left-hand side of the "Patient Summary" view, includes an expansive array of notes, reports, and results for the selected patient.

Examples of the types of documents contained in the portal include the following:

- Care Plans
- Consultations
- Discharge, History, and Physical Notes
- Hospital, ED, and PCP Visit Notes
- Immunization and Vitals Information
- Radiology, Microbiology, and Laboratory Results
- Summary Documents
- VA Continuity of Care Documents
- Operative, Diagnostic, and Procedural Notes

Figure 16. Document View Component

Document View	0	Q	Ç
Showing All Mark All As Read			
Group By Category Sort By Date			
🗊 Patient Summary			
Summary Documents (1)			
Care Plans (1 / 2)			
Consultations (1 / 1)			
Discharge, History and Physicals (4 / 4)			
Emergency (2 / 2)			
Immunizations (1 / 1)			
Laboratory (17 / 17)			
Microbiology (1 / 1)			
Operative, Diagnostic and Procedures (4 / 4)	.)		
OV Outpatient (1 / 1)			
Radiology (7 / 7)			
Vitals (1 / 1)			



Document View (cont.)

By default, the "Document View" is organized by the type of document (i.e., "Category"). For the document category of interest, users can select the corresponding title from the view to expand a list of all relevant notes/reports/results (Figure 17).

Figure 17. Document Expansion View

Discharge, History and Physicals (4 / 4) 12-Mar-2016 Discharge summary QUICKSELL DO, NINA 12-Mar-2013 Discharge Medication Reconciliation TEST, PHYSICIAN 02-Mar-2011 E_H&P Report Provider, Unknown 06-Dec-2010 E Discharge Summary Provider, Unknown

To view the enclosed data for a particular document, users can select it from the expanded list. Doing so will open the selected document in the format received from the participating provider (Figure 18).

Figure 18. Document Selection View

E_H&P Report (9 years ago)										
E_H&P Report										
Responsible Doctor	Provider, Unknown	Observation Date	02-Mar-2011 00:00							
Hospita1	Eastern Maine Medical Center									
Patient DOB	11-Sep-1952									
Patient Name	HINTEST, Demo									
Patient MRN	HIN1234									
Specimen										
E_H&P Report			Final							
EASTERN MA	AINE	NAME: Testing, Heis	emmc2							
MEDICAL CH	ENTER	MRN: 1313241								
489 State Street	t	DOB: 12/10/1948								
Bangor, Maine	04401	FIN: 101409407								
	ADMI	T DATE: 03/02/2011								
	UNI	I/ROOM ER/								



Document View Functionality

Within certain categories of documents, additional features and functionality exist aside from viewing the document's contents. For example, in the "Laboratory" document category, color-coding (derived from the resulting laboratory) is used to quickly call attention to results of interest (Figure 19):

- Black Normal/expected range
- Yellow Abnormal range
- Red Critical range

Figure 19. Document Color-Coding Function



Additionally, upon selecting a particular document, users can often graph the patient's results over time by selecting the "View Cumulative Results" hyperlink located to the right of the document title (Figure 20).





Document View Functionality (cont.)

Contents contained in the "Document View" will vary by patient based on their specific encounters and/or data received from participating providers.

By selecting the eye icon **o** users can configure the display of contents in the "Document View" according to their personal preferences (Figure 21):

- 1. Show Options to show all documents or only those received within a certain period of time
- 2. Group By Options to group the documents by Category, Date, Service, or Provider
- 3. Sort By Options to sort the ordering of documents by Date, Title, or Provider

Alternatively, users may also choose to select the magnifying glass icon \mathbf{Q} to search the repository by keyword (Figure 22).

Document View QC Show All Group By Category Sort By Date Cancel

Figure 21. Document Configuration Function

Figure 22. Document Search Function

Document View	0	Q	Ç
Q			
Read Unread			



Veterans Affairs Record Search

At the top of the "Patient Summary" view, the "VA Record Search" tab gives providers the opportunity to securely view and share health information from veterans' national health records included in the Veterans Affairs (VA) Virtual Lifetime Electronic Record Health Information Exchange (VLER HIE) initiative (Figure 23).

Figure 23. VA Records Search Tab



Once users have selected the "VA Records Search" tab, they can click the "Retrieve Document" button located at the bottom of the page to initiate the search and retrieval of the selected patient's Continuity of Care Document (CCD) (Figure 24). Once the search is complete, the selected patient's CCD will automatically display on the page, if available.

Figure 24. VA Records Search View





Veterans Affairs Record Search (cont.)

If users need to view the document again at a later date (within the three-day privacy seal permission), it can be found in the selected patient's Document Library within the "VA Documents" folder (Figure 25).

Figure 25. VA Records Document View

= 🔄 Dationt Summany 🔗 M	A	VA Record Search 🗈 Non-Emergent Tr	ansportation								
= Patient Summary SS W	VA Records Search 0.12		Return to Patient Su	<u>mmary</u>			Print				
Certain sensitive nationt		Dep	artment of Ve	terans Affairs Summarization of	Episode Note						
information is not				Created On: August 15, 2019							
information is not											
displayed due to legal	Female3-Mar-1962 (DOB)	4 3 4 0 \									
🧑 restrictions. There may be	1013315140V913383 (2.16.840.1.113883. 55555 HOWARD ST	.4.349)									
protected mental health	(858)555-5555										
data available. Break	Electronically generated by Department Allergies	t of Veterans Alfairs on August 15, 2019									
Drivery Cool	Department of Veterans Affairs	Department of Veterans Affairs Usuantee Structure of Medical Information Medical Information Business Rules for Construction of Rules For Rules F									
Privacy Sear	Allergy	Coded Allergy	Verification Date	Event Type	Reaction	Severity	Source				
	ASA	Coded Allergy Name Not Available	20100614094214	Propensity to adverse reactions to drug	MUSCLE PAIN		HAMPTON VA MEDICAL CENTER				
Document View 🛛 💿 🔍 🖒	ASPIRIN RELATED MEDICATIONS	Coded Allergy Name Not Available	20151230145412	Propensity to adverse reactions to drug	RASH	MODERATE	HUNTER HOLMES MCGUIRE HOSPITAL				
Showing All Mark All As Dood	CHOCOLATE	Coded Allergy Name Not Available	20151221101852	Propensity to adverse reactions to substance	RASH	MODERATE	HAMPTON VA MEDICAL CENTER				
Showing All Mark All As Read	IBUPROFEN	Coded Allergy Name Not Available	20180717093040	Propensity to adverse reactions to drug	•		SAN DIEGO HCS				
Group By Category Sort By Date	IMMUNE SERUMS	Coded Allergy Name Not Available	20180829094819	Propensity to adverse reactions to drug	ANAPHYLAXIS		SPARK M. MATSUNAGA VAMC				
Patient Summary	IODINE CONTRAST EVEN WITH PREP	Coded Allergy Name Not Available	20180917103205	Propensity to adverse reactions to drug	DYSPNEA ANAPHYLAXIS	SEVERE	SPARK M. MATSUNAGA VAMC				
Summary Documents (1 / 1)	NONSTEROIDAL ANTI-INFLAMMATORY	Y Coded Allergy Name Not Available	20100104183707	Propensity to adverse reactions to drug	ABDOMINAL PAIN DIARRHEA		SAN DIEGO HCS				
Laboratory (3 / 3)	PENICILLIN	Coded Allergy Name Not Available	20100826113357	Propensity to adverse reactions to drug	RASH NAUSEA AND VOMITING		EAST ORANGE-VA NEW JERSEY HCS				
VA Documents (1)	RADIOLOGICAL/CONTRAST MEDIA	Coded Alleray Name Not Available		Propensity to adverse reactions to drug	RASH		SAN DIEGO HCS				
	1										

07-11-2019 Consent to Sha

Community Services Information

At the top of the "Patient Summary" view, the "Community Services" tab may provide additional social determinants of health information for the selected patient (Figure 26). The section incorporates available data from both clinical and non-clinical organizations that are providing non-emergent transportation, housing support, and other critical services.

By selecting the "Community Services" tab, users can identify whether the selected patient has any social determinants of health information of interest to review.

≡ 😰 Patient Summary 🔽 VA Record Search	🕵 My Patients 🥑 Commu	unity Services			
Non-Emergent Transportation History					
Search					
Provider 🔶	Date of Service	Code 🕴	Туре	\$	Description
LOGISTICARE SOLUTIONS` LLC	2019-11-25	T2003	NON-EMERGENCY TRANSPORTATION; ENCOUNTER/TRIP	Physician's office to a Reside	nce
LOGISTICARE SOLUTIONS' LLC					-
	2019-11-25	12003	NON-EMERGENCY TRANSPORTATION; ENCOUNTER/TRIP	Residence to a Physician's of	fice

Figure 26. Community Services Tab View

Note: Non-emergent transportation data available in the portal includes services provided and submitted to MaineCare (Maine Medicaid) via their claims data system.





Notification Services



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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 directly within the Clinical Portal, ensuring that critical patient care events trigger immediate follow-on action.

To configure the portal's Notification Services, users must complete the following steps:

- 1. Set up their "My Patients" settings Establish a list of patients to receive notifications on
- 2. Set up their "My Subscriptions" settings Establish the types of events to receive notifications on for their defined list of patients

Once initial set up is complete for both the "My Patients" and the "My Subscriptions" settings, users can manage their configurations ongoing to ensure that their most up-to-date patient panel is being tracked and monitored appropriately through notification alerting.



My Patients Configuration

Within the "Notifications" main navigation function, located on the left-hand side of the screen, there is the option for users to configure their "My Patients" settings (Figure 27).

Figure 27. My Patients Option



Upon selecting the option, users will be brought to a module where they can search for patients in a similar way as they are able to do so in the "Demographic Search" function.

When results from the user's search return, there may be more than one patient that meets the provided search criteria (Figure 28).

Figure 28. My Patients Search Function

My Patients													
Add or Search													
Site		 MRN 		Add Relationship									
- OR - First Name abigail	Last N	lame testing	D	Date of Birth yyyy-mm-dd	Zip Code Se	arch							
Select a patient to Al	DD or <u>cancel</u>												
Filter search results]										Show [25 v rows
Select	First Name	\$	Middle Name	🕴 🛛 Last Name	\$ Date of Birth	¢	Gender	\$	City	\$ State	÷	Zip	\$
3	ABIGAIL			TESTING	1974-02-28		F	BANGOR		ME	C	00000000	-
0	ABIGAIL	L		TESTING	1980-07-16		F	BANGOR		ME	C	44014042	
٢	ABIGAIL			TESTING	1946-04-22		F	BANGOR		ME	0	4401	



My Patients Configuration (cont.)

For users to confirm the patient that they would like to add to their "My Patients" list, they can select the green-highlighted checkmark to the left of the patient's name in the table (Figure 29).

Figure 29. Adding Patients to the "My Patients" Table

Select	First Name
٢	ABIGAIL

Upon adding the selected patient to their "My Patients" list, the module will refresh and the selected patient will appear in the user's "My Patients" table (Figure 30).

Figure 30. Viewing Patients in the "My Patients" Table

My P	atients												
Add or	ld or Search												
Site	Maine Medical Ce	nter 🔻 M	RN HINMMC	Add Relationship									
- OR -													
First Na	me abigail	Last Name test	ing	Date of Birth yyyy-mm-dd	Zip Code	Search							
Delete	Expired Relationshi	Delete All Relationships	End Date for All	Edit All End Dates Clear	All End Dates					Show Notifications			
Search p	patient panel									Show 25 Trows			
	Delete	Patient Site	♦ MRN	Patient Name	\$	Gender 🔶	Date of Birth	Start Date	 End Date 	•			
	8	EMHS	2230329	TESTING, ABIGAIL		F	1974-02-28	2020-01-23		1			



My Patients Configuration (cont.)

Similarly, users can add a patient to their "My Patients" list from within the selected patient's record. If users select the "My Patients" tab located at the top of the patient's "Patient Summary" view, they will be redirected to the "My Patients" module where the patient's information will be pre-populated in the search. Users can then select the "Add Relationship" button to add the patient to their list (Figure 31).

Figure 31. Adding Patients to the "My Patients" Table



Upon adding the selected patient to their "My Patients" list, the module will refresh and the selected patient will appear in the user's "My Patients" table (Figure 32).

Figure 32. Viewing Patients in the "My Patients" Table

My Pa	tients													
Add or S	Add or Search													
Site			• M	IRN	Add R	elationship								
- OR - First Nam	ne		Last Name		Date of Birth	/yyy-mm-dd	Zip Code	Search						
Relationship added														
Delete E	xpired Relati	onships	elete All Relationships	End Date for A	Edit All End	Dates Clear All End D	ates				Show Notifications			
Search pa	itient panel										Show 25 v rows			
De	lete	Patier	nt Site 🕴 🕴	MRN	Patient Nam	e 🍦 Gender	Date of	Birth 🕴	Start Date	•	End Date 🕴			
•	8	SJH	SJHFA	KE0011	Notifier, Albert	М	1967-1	D-10	2020-02-27		1			
	8	EMHS	22303	<u>29</u>	TESTING, ABIGAIL	F	1974-0	2-28	2020-01-23		1			



My Patients Functionality

Within the "My Patients" module, users can perform a number of functions as it relates to managing their established patient panel (Figure 33), including :

- 1. "Search Patient Panel" Search for a particular patient(s) of interest in the "My Patients" table
- 2. "Edit End Date" Indicate when notification services should terminate for a selected patient
- 3. "Edit All End Dates" Indicate when notification services should terminate for all patients
- 4. "Clear All End Dates" Indicate that notification services should continue indefinitely for all patients
- 5. "Delete Relationship" Remove a selected patient from the "My Patients" table
- 6. "Delete All Relationships" Remove all patients from the "My Patients" table
- 7. "Delete Expired Relationships" Remove all patients with an end date that has passed from the "My Patients" table





My Subscriptions Configuration

Once users have configured their "My Patients" list by including all patients that they have an interest in tracking and monitoring over time via event-based notifications, users can then configure the actual alert subscriptions that they would like to receive.

Within the "Notifications" main navigation function, located on the left-hand side of the screen, there is the option for users to configure their "My Subscriptions" settings (Figure 34).

Figure 34. My Subscriptions Option

- NOTIFICATIONS
My Subscriptions
My Patients

Upon selecting the option, users will be brought to a module where they can configure their notification subscription preferences. To start, users should confirm their email address and default email preferences – that is, to either have the system notify them of events in **real-time** or in a **daily summary** capturing all applicable alerts for the past 24 hours (Figure 35).

Figure 35. Initial Subscription Preferences





My Subscriptions Configuration (cont.)

For the next step in configuring their notification subscription preferences, users must select the actual events that they would like to receive emails about for patients included in their "My Patients" list. To do so, they can select all wanted notifications from the options presented (Figure 36).

Figure 36. Notification Subscription Options

Notification
Inpatient Admission
Inpatient Discharge
Patient is admitted to ER
Patient is discharged from ER
SNF Unit Discharge
A new document (imaging report) is available
Final Radiology Report is available
Final Laboratory Result is available
Final Microbiology Result available
Interim Microbiology Result available
Patient Deceased
A new document is available



My Subscriptions Configuration (cont.)

Upon selecting individual notifications to receive, the "Delivery Options" field will populate per subscription with the option to change the alert's default delivery settings that were selected earlier (i.e., real-time versus daily summary emails) (Figure 37).

For example, if users wish to receive all selected notifications in real-time with the exception of "Inpatient Discharge" events, they can change the delivery options for the event notification to daily summary emails instead.

Figure 37. Notification Subscription Delivery Options

Notification	Delivery Options
Inpatient Admission	 Notify in real time Concerto User Messaging Notify in real time Email Notify in Daily Summary Email OK Use Defaults

Once users have selected all wanted notifications, and configured their delivery options accordingly, they must click on the "Save" button located at the bottom of the form in order to confirm and implement their changes.



Example Notification Email – Real-Time Alert

Figure 38. Real-Time Notification Email Example

Dear HealthInfoNet User,

One of the patients that you are tracking in the Clinical Portal has had a new clinical event.

The patent with a medical record number (MRN) of 54321 was admitted to the Emergency Room at FAC3 (Site) on March 5, 2020.

To view more information on this event, log in to the Clinical Portal and follow the instructions below:

- 1. Visit the "My Patients" menu navigation function located on the left-hand side of the screen
- Select the "Show Notifications" button located in the upper-right hand corner of the "My Patients" table where your patient panel is displayed
- 3. Identify the corresponding patient's record in the "Events in Summary" table

Note: The "Show Notifications" view can also be used to review your patient panel's entire list of clinical events (historical and current) captured through notifications.

For Clinical Portal Users Using a Distribution Email to Receive Notifications:

- 1. Visit the "Demographic Search" menu navigation function located on the left-hand side of the screen
- 2. Enter the above "Site" and "MRN" values into the search function and select the patient from the results table
- 3. View the selected patient's medical record to learn more about their recent event(s)

For more information on the Clinical Portal's Notification Services, including how to update your settings or unsubscribe to its services, refer to the Clinical Portal User Guide, which can be found online by visiting www.hinfonet.org

You can access the HealthInfoNet Clinical Portal by visiting:

- For VPN users: <u>https://maine.prod.hinfonet.org/concerto</u>
- For VIP users: <u>https://vip.hinfonet.org/concerto</u>



Example Notification Email – Daily Summary Alert

Figure 39. Daily Summary Notification Email Example

Dear HealthInfoNet User,

Patients that you are tracking in the Clinical Portal have had clinical events within the past 24 hours.

The following list identifies each provider site (Site) where an event occurred and the corresponding patient medical record number (MRN) for the event:

- FAC 123456
- FAC2 54321
- FAC3 9999999

To view more information on the event(s), log in to the Clinical Portal and follow the instructions below:

- 1. Visit the "My Patients" menu navigation function located on the left-hand side of the screen
- 2. Select the "Show Notifications" button located in the upper-right hand corner of the "My Patients" table where your patient panel is displayed
- Select the most recent "HealthInfoNet Daily Summary" hyperlink in the "Email Subject" column to view the "Events in Summary" table

Note: The "Show Notifications" view can also be used to review your patient panel's entire list of clinical events (historical and current) captured through notifications.

For Clinical Portal Users Using a Distribution Email to Receive Notifications:

- 1. Visit the "Demographic Search" menu navigation function located on the left-hand side of the screen
- 2. Enter each of the above "Site" and "MRN" values per patient into the search function and select the patient from the results table
- 3. View the selected patient's medical record to learn more about their recent event(s)

For more information on the Clinical Portal's Notification Services, including how to update your settings or unsubscribe to its services, refer to the Clinical Portal User Guide, which can be found online by visiting www.hinfonet.org

You can access the HealthInfoNet Clinical Portal by visiting:

- For VPN users: <u>https://maine.prod.hinfonet.org/concerto</u>
- For VIP users: <u>https://vip.hinfonet.org/concerto</u>



My Patients' Notifications View

In addition to receiving email-based alerts for their notification subscriptions, users can use the "My Patients" module directly within the portal to view all alerts for their patient panel within the last 6 months. To do so, users can select the "Show Notifications" button located in the upper-right corner of the "My Patients" table (Figure 40).

Figure 40. Show Notification Function

Show Notifications

For each patient in their "My Patients" table, users can view notifications for the past 6 months (Figure 41).

Figure 41. All Notifications View

Notification Sent 💡	Sent To	9	Patient Name	MRN	¢.	Point of Care	\$ Email Subject	0	Report Name
2019-11-21 12:31:09			TESTLAB, PATHNET	444005		Bridgton Hospital	HealthInfoNet Daily Summary		Procalcit
2019-11-20 17:27:58			TESTLAB, PATHNET	444005		Bridgton Hospital	Final Laboratory Result is available		Procalcit
2019-11-15 05:30:45			TESTLAB, PATHNET	444005		Bridgton Hospital	HealthInfoNet Daily Summary		Procalcit

Selecting the "HealthInfoNet Daily Summary" hyperlink in the "Email Subject" field will produce a new "Events in Summary" table displaying all of the events for the selected patient within the last 24 hours from the summary's delivery (Figure 42).

Figure 42. Events in Summary Notifications View

Events in Summary X							
Search					Show 25 🗸 r	rows	
Event Date 🔶	Patient Name	▲ MRN ♦	Point of Care	Event Type	Report Name	÷	
2019-11-21 15:07:43	TESTLAB, PATHNET	444005	Bridgton Hospital	Final Laboratory Result is available	Procalcit		





User Account Services



User Guide for the Clinical Portal (Version 8.9.15)

My Details

Figure 43. My Details Option

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 43).

Important functionality in the "My Details" view for users to review and consider are outlined below (Figure 44).





Additional Features & Functionality



User Guide for the Clinical Portal (Version 8.9.15)

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 (<u>Figure 45</u>).



Figure 45. User Toggle Drop-Down View

Worklists

In the upper-left hand corner of the "Patient Summary" view, there is a small (+) icon that users can select to add the selected patient to a worklist of their choosing. When the (+) icon is selected, a drop-down menu will appear to the right with the user's defined worklists (Figure 46).

Figure 46. Worklist Drop-Down Menu

·	2127594 TESTING	ABIGAIL	(F/7	73 years)
	High-Risk Patients	mary	VA	VA Record S
	My Patient Panel	patient		Demog

Selecting one or multiple worklist(s) for the selected patient to belong will tag the patient accordingly. The next time the user visits the "Worklists" option from the main menu, the selected patient will be displayed in the tagged worklist(s) (Figure 47).

Figure 47. Worklist Drop-Down Menu

	High-Risk Patients Rename									
			MRN	Name	SEX	Age	₽			
		2127594		TESTING, ABIGAIL	F	73 years	-			
Remove None selected										



Patient Toggle

While viewing a particular patient's information, users can easily toggle to other patients that met their initial demographic search criteria in the event that a selected record does not correspond to the patient of interest.

To do so, users can simply select the tri-bar icon located in the upper-right hand corner of the page to display a drop-down menu listing all patients corresponding to the user's original search (Figure 48).

Users can then select another patient from the results to view that newly selected patient's information. **Note:** Users will be required to break the privacy seal for each new patient selected from the drop-down menu.

Figure 48. Patient Toggle Drop-Down View





Links

Within the "Links" main navigation function, located on the left-hand side of the screen, users may find additional applications and software, such as the "UpToDate" point-of-care medical resource, depending on their role, organization, and relationship with HealthInfoNet (Figure 49).

Figure 49. Links Function





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 50).

Figure 50. Security Question Window

Security Question		•
Answer		
Setting your securi	ty 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 51).

Figure 51. Forgot Your Password Link



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 <u>clienteducation@hinfonet.org</u> for more information
- Public resources available at <u>https://hinfonet.org/resources/clinical-</u> education/
- HealthInfoNet's online training site also provides courses and CNE credits to better understand and effectively use the HIE; visit <u>http://hinfonetacademy.org/</u>for more information



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