User Guide Notifications Services



Clinician User Role IS Support User Role

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.





Notification Services



User Guide for the Clinical Portal (Version 8.9.15)

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 1).

Figure 1. 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 2).

Figure 2. My Patients Search Function

My Patients															
Add or Search															
Site		 MRN 		Add Relationship											
- OR -	OR -														
First Name abigail	rinst Name labigail Last Name lesting Date of Birtin 19999-mm-bod Zip Code Search														
Select a natient to A	DD or cancel														
Select a patient to A	and the second s	_													
Filter search results														Show	25 V rows
Select	First Name	\$	Middle Name	Last Name	♦ Da	ate of Birth	¢	Gender	¢	City	\$	State	÷	Zip	\$
0	ABIGAIL		TESTING		1	1974-02-28		F	BANGOR			ME	00	0000000	^
0	ABIGAIL	L	TESTING		1	980-07-16		F	BANGOR			ME	04	14014042	
٢	ABIGAIL			TESTING	1	1946-04-22		F	BANGOR			ME	04	1401	



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 3).

Figure 3. 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 4).

Figure 4. Viewing Patients in the "My Patients" Table

My Pa	atients										
Add or	Search										
Site	Maine Medical Ce	nter 🔻	MRN HINMMC	Add Relationship							
- OR -	OR -										
First Nar	me abigail	Last Name te	sting	Date of Birth yyyy-mm-dd	Zip Code Search						
Delete E	Expired Relationshi	Delete All Relationships	End Date for All	Edit All End Dates Clear Al	II End Dates				Show Notifications		
Search p	atient 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 5).

Figure 5. 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 6).

Figure 6. Viewing Patients in the "My Patients" Table

My Patients								
Add or Search								
Site		 MRN 		Add Relationship				
- OR -								
First Name		Last Name	Date of E	irth yyyy-mm-dd	Zip Code	Search		
Relationship added Delete Expired Rela	tionships Delete	All Relationships En	nd Date for All Edit ,	All End Dates Clear All End	Dates			Show Notifications
Search patient parier								5110W 25 • 10W3
Delete	Patient Sit	e 🕴 MF	RN 🕴 Patient	Name 🕴 Gende	er 🍦 🛛 Date of Bi	rth 🕀	Start Date 🔻	End Date 🕴
8	SJH	SJHFAKE00	11 Notifier, Albert	м	1967-10-1	10	2020-02-27	1
8	EMHS	2230329	TESTING, ABIG	AIL F	1974-02-2	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 7), 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 8).

Figure 8. 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 9).

Figure 9. Initial Subscription Preferences

Concerto Username My Email Address	
By default	 Notify in real time Concerto User Messaging Notify in real time Email Notify in Daily Summary Email



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 10).

Figure 10. 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 11).

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 11. 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 12. 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 13. 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 14).

Figure 14. Show Notification Function

Show Notifications

For each patient in their "My Patients" table, users can view notifications for the past 6 months (Figure 15).

Figure 15. All Notifications View

Notification Sent 💡	Sent To	9	Patient Name	MRN	φ	Point of Care	\$ Email Subject	9	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 16).

Figure 16. Events in Summary Notifications View

Events in Summary											
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						





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



User Guide for the Clinical Portal (Version 8.9.15)







info@hinfonet.org



60 Pineland Drive Portland Hall, Suite 230 New Gloucester, ME 04260



