

# User Guide Clinical Portal

# Table of Contents

- [Welcome to the Clinical Portal.....3](#)
- [We're Here to Help.....4](#)
- [Account Setup & Initial Login.....5](#)
- [Patient Lookup Services.....10](#)
- [Patient Record Services.....18](#)
- [Notification Services.....33](#)
- [User Account Services.....45](#)
- [Additional Features & Functionality.....47](#)
- [Clinical Education & Training Opportunities.....53](#)
- [Change Log.....54](#)



# 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.



# 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](mailto: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.





User Guide for the Clinical Portal  
(Version 8.9.15.2)

# 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](mailto: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.



# 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](#)).

**Figure 1.** Data Capture Report

Please enter your user ID and password

User ID

Password

? [Forgot your password?](#)

Login

HIN Production Environment

[Click here to 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:

[https://maine.prod.hinfonyet.org/static/HealthInfoNet\\_data\\_Coverage.pdf](https://maine.prod.hinfonyet.org/static/HealthInfoNet_data_Coverage.pdf)

|                                                                                  |  |                                |  |                     |                |                   |   |                     |  |                     |                   |               |  |                    |  |            |  |                    |  |                        |  |           |  |                      |  |            |  |      |  |                 |  |              |  |                              |  |     |  |            |  |              |  |                                     |  |                                            |  |                |  |     |  |                              |  |              |  |                   |  |                 |  |        |  |            |  |                                  |  |                         |  |                      |  |            |  |       |  |       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|----------------------------------------------------------------------------------|--|--------------------------------|--|---------------------|----------------|-------------------|---|---------------------|--|---------------------|-------------------|---------------|--|--------------------|--|------------|--|--------------------|--|------------------------|--|-----------|--|----------------------|--|------------|--|------|--|-----------------|--|--------------|--|------------------------------|--|-----|--|------------|--|--------------|--|-------------------------------------|--|--------------------------------------------|--|----------------|--|-----|--|------------------------------|--|--------------|--|-------------------|--|-----------------|--|--------|--|------------|--|----------------------------------|--|-------------------------|--|----------------------|--|------------|--|-------|--|-------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
|  |  | Available Data                 |  | ✓                   | Not Applicable |                   | — | Recent Additions    |  | ✓                   | Revised 2/11/2020 |               |  |                    |  |            |  |                    |  |                        |  |           |  |                      |  |            |  |      |  |                 |  |              |  |                              |  |     |  |            |  |              |  |                                     |  |                                            |  |                |  |     |  |                              |  |              |  |                   |  |                 |  |        |  |            |  |                                  |  |                         |  |                      |  |            |  |       |  |       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Data Coverage                                                                    |  | Hospital Inpatient & Emergency |  | Discharge Summaries |                | Emergency Reports |   | History & Physicals |  | Hospital Outpatient |                   | Consultations |  | OP Visit Documents |  | Ambulatory |  | Office Visit Notes |  | Common Data Categories |  | Allergies |  | Anatomical Pathology |  | Care Plans |  | CCDs |  | Chief Complaint |  | Demographics |  | Diagnosis Codes <sup>1</sup> |  | EKG |  | Encounters |  | Immunization |  | Medications (SureScripts/MaineCare) |  | Operative, Diagnostic, Procedure Documents |  | Payer Category |  | PCP |  | Procedure Codes <sup>1</sup> |  | Problem List |  | Radiology Reports |  | Other Documents |  | Vitals |  | Laboratory |  | Internal Laboratory <sup>2</sup> |  | Microbiology (Cultures) |  | Affiliated Lab (ALI) |  | Dahl Chase |  | NorDx |  | Quest |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                  |  | Hospitals & Health Systems     |  |                     |                |                   |   |                     |  |                     |                   |               |  |                    |  |            |  |                    |  |                        |  |           |  |                      |  |            |  |      |  |                 |  |              |  |                              |  |     |  |            |  |              |  |                                     |  |                                            |  |                |  |     |  |                              |  |              |  |                   |  |                 |  |        |  |            |  |                                  |  |                         |  |                      |  |            |  |       |  |       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

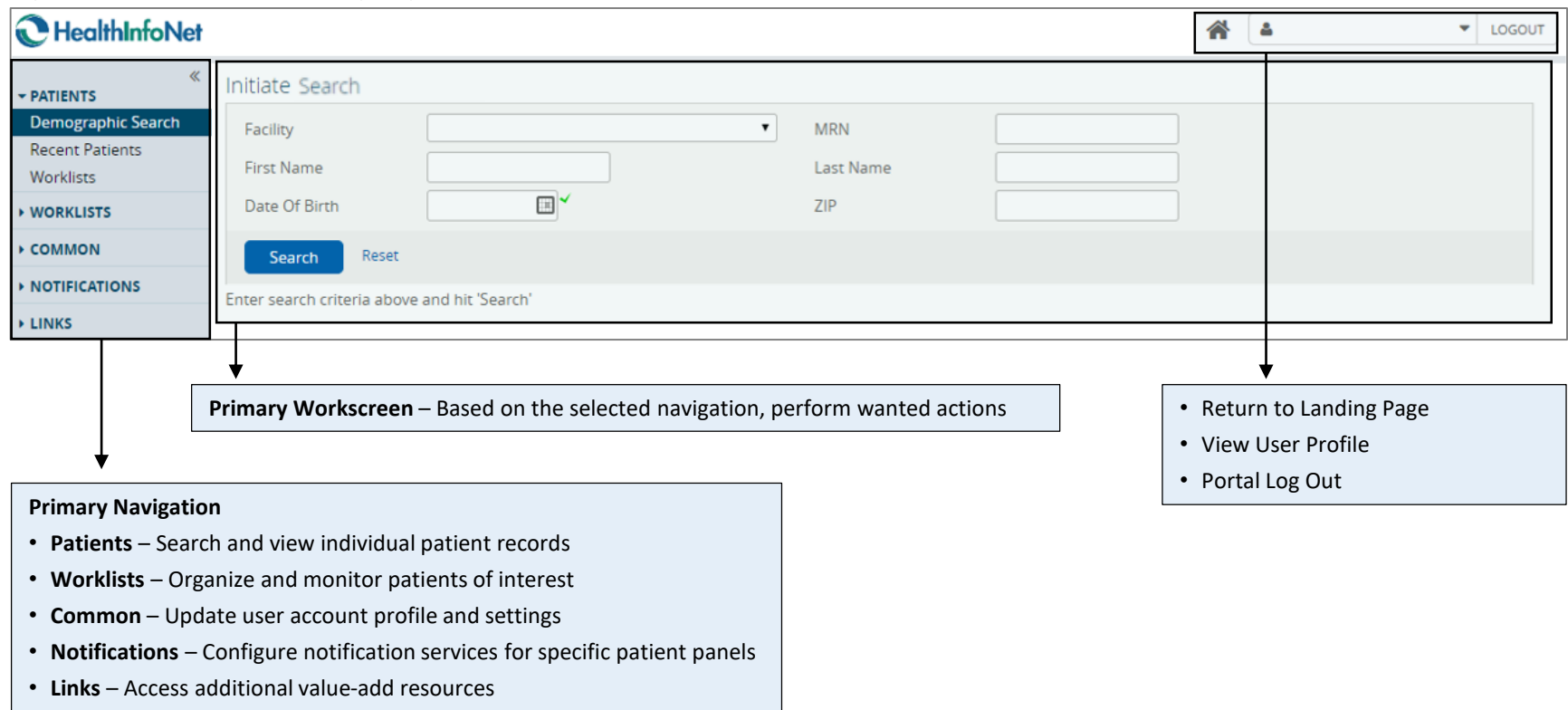


# Landing Page

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](#)).

Figure 2. User Interface Landing Page





User Guide for the Clinical Portal  
(Version 8.9.15.2)

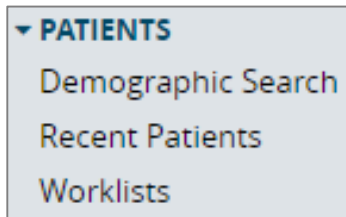
# Patient Lookup Services

# 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



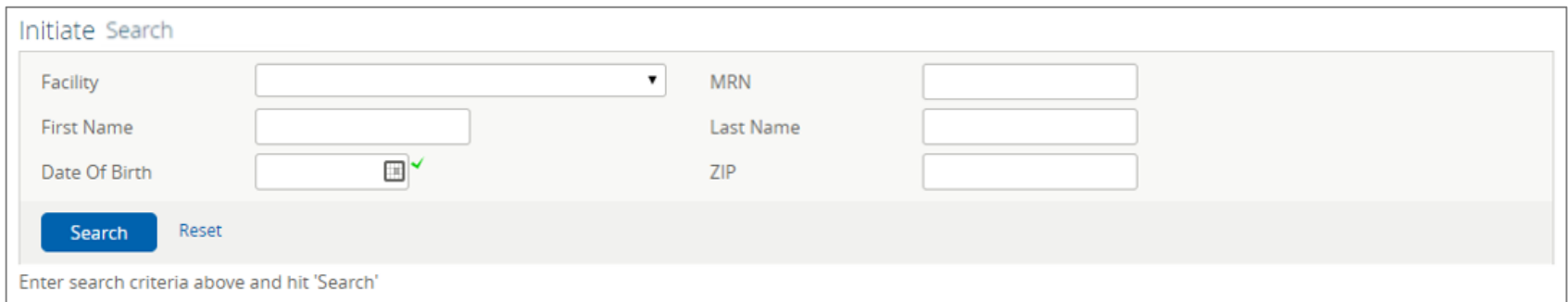
# Demographic Search

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



The screenshot shows a web form titled "Initiate Search" for demographic search. It contains two columns of input fields. The left column includes "Facility" (a dropdown menu), "First Name" (a text box), and "Date Of Birth" (a date picker with a green checkmark icon). The right column includes "MRN" (a text box), "Last Name" (a text box), and "ZIP" (a text box). Below the input fields are two buttons: a blue "Search" button and a "Reset" link. At the bottom of the form, there is a text instruction: "Enter search criteria above and hit 'Search'".

| Facility                                                                                                                                                                                               | MRN                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| <input type="text"/>                                                                                                                                                                                   | <input type="text"/>           |
| First Name <input type="text"/>                                                                                                                                                                        | Last Name <input type="text"/> |
| Date Of Birth <input type="text"/>   | ZIP <input type="text"/>       |

[Reset](#)

Enter search criteria above 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

| <div>Search Reset</div>                                                          |           |            |    |               |     |          |       |       |              |                       |             |
|----------------------------------------------------------------------------------|-----------|------------|----|---------------|-----|----------|-------|-------|--------------|-----------------------|-------------|
| <input type="checkbox"/>                                                         | Last Name | First Name | MI | Date Of Birth | SEX | CITY     | STATE | ZIP   | Opt-out Date | Mental Health Consent | HIV Consent |
| <input type="checkbox"/>                                                         | DEMO      | HINTEST    |    | 09-Jul-1948   | F   | PORTLAND | ME    | 04103 |              |                       |             |
| <input type="checkbox"/>                                                         | Hintest   | Demo       |    | 11-Sep-1952   | M   | Portland | ME    | 04103 |              |                       |             |
| <div>Add checked results to workload Replace workload with checked results</div> |           |            |    |               |     |          |       |       |              |                       |             |

# 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 not sent to HealthInfoNet unless individual patients decide to **opt-in** to sharing their information.
3. **HIV Information** – Patients' HIV information is not 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

|                                   |  |             |               |   |
|-----------------------------------|--|-------------|---------------|---|
| Last 7 Days                       |  |             |               |   |
| <input type="checkbox"/>          |  | MRN         | Name          |   |
| <input type="checkbox"/>          |  | HINMMC      | HINTEST, Demo | - |
| <input type="checkbox"/>          |  | DEMOHINTEST | DEMO, HINTEST | - |
| <div>Remove   None selected</div> |  |             |               |   |
| Showing 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

The screenshot displays two worklist panels. The top panel, titled 'High-Risk Patients' with a 'Rename' link, contains a table with one patient: HINMMC, HINTEST, Demo, M, 67 years. Below the table is a 'Remove' button and the text 'None selected'. The bottom panel, titled 'My Patient Panel' with a 'Rename' link, contains a table with one patient: 2127594, TESTING, ABIGAIL, F, 73 years. Below this table is also a 'Remove' button and the text 'None selected'. Both panels show 'Showing 1 of 1' items.

|                          | MRN    | Name          | SEX | Age      |   |
|--------------------------|--------|---------------|-----|----------|---|
| <input type="checkbox"/> | HINMMC | HINTEST, Demo | M   | 67 years | - |

Remove None selected

Showing 1 of 1

|                          | MRN     | Name             | SEX | Age      |   |
|--------------------------|---------|------------------|-----|----------|---|
| <input type="checkbox"/> | 2127594 | TESTING, ABIGAIL | F   | 73 years | - |

Remove None selected

Showing 1 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 ([Figure 8](#)). 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.

**Figure 8.** Break Privacy Seal Form

The screenshot shows a web form titled "Access Sealed patient". Below the title, it says "A reason is required to view information about this patient." There are two main input areas: "Reason" with a dropdown arrow and "Additional Information" with a large text area. At the bottom, there is a checkbox that says "I understand that this will be recorded and may be audited." and two buttons: "Break Privacy Seal" (in a blue box) and "Cancel". An arrow points from the "Reason" dropdown to a list of options on the right.

**Reasons for Access:**

- EMERGENCY CARE
- Direct Patient Care – Ambulatory Care
- Direct Patient Care – Consultant
- Direct Patient Care – Home Care / Hospice
- Direct Patient Care – Hospital
- Direct Patient Care – Long Term / Post Acute Care
- Direct Patient Care – Mental Health
- Direct Patient Care – Pharmacy
- Direct Patient Care – Specialist
- Support Admin – Care Coordination
- Quality Data Support
- Information Technology Support

# Patient Record Services



User Guide for the Clinical Portal  
(Version 8.9.15.2)

# 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).

**Figure 9. Patient Summary View**

Mental Health Access Privacy Seal

Clinical Document View

**Clinical Summary**

- Demographic Details
- Allergies
- Active Problems
- Medication Management
- Encounter/Visit History

**Demographics**

**Hinest, Demo**

Demographics - CPB: Sen: Male, Date of Birth: Sep 11 1952 (67 years), Address: 125 PINE ST, PORTLAND ME 04103, Phone: (207)641-1952

Primary Care Provider: CLAXTON EDMUND V JR

Emergency Contact: CATHY ADMEST

**Allergies**

Certain sensitive patient information is not displayed due to legal restrictions. There may be protected mental health data available Break Privacy Seal

| Details                           | Reaction | Severity | Date Entered | Location* |
|-----------------------------------|----------|----------|--------------|-----------|
| Iodine                            |          |          | 10/04/2013   | SH        |
| Iodinated Contrast Media - IV Dye | Hives    |          | 10/04/2013   | SH        |
| Asthromycin                       | HIVES    | M        | 09/09/2011   | CARY      |
| ALTEPLASE                         | RASH     | Severe   | 03/07/2011   | EMHS      |
| No Known Allergies                |          |          | 02/18/2011   | MMC       |

**Active Problems**

| Code   | Description                 | Status | Onset Date | Location* |
|--------|-----------------------------|--------|------------|-----------|
| 784.0  | Headache                    |        | 01/29/2013 | WSFP      |
| 787.1  | Heartburn                   |        | 01/29/2013 | WSFP      |
| 625.2  | Mittelschmerz               |        | 01/29/2013 | WSFP      |
| 780.79 | Other malaise and fatigue   |        | 10/31/2012 | WSFP      |
| 372.30 | Conjunctivitis, unspecified |        | 03/22/2012 | WSFP      |

**Prescription Medications Dispensed within Last 120 Days**

| Date Dispensed | Drug Name                | Dose | Qty | Refill | Prescribed By   | Pharmacy                | Instructions              |
|----------------|--------------------------|------|-----|--------|-----------------|-------------------------|---------------------------|
| 01/15/2015     | ATENLOLOL 50 MG          |      | 90  | 3      | Andrews, Robert | CVS                     | Take one pill twice daily |
| 01/15/2015     | LISINAPRIL 10 MG         |      | 90  | 3      | Smith, Mary     | WALGREENS               | Take once daily           |
| 11/10/2011     | RANITIDINE 150MG CAPSULE |      | 30  |        | KRISTY, REED    | ESI Mail Order Pharmacy |                           |

**Encounter/Visit History (Hovering Over Data Under Columns Marked with an Asterisk\*\* May Show Additional Information)**

Certain sensitive patient information is not displayed due to legal restrictions. There may be protected mental health data available Break Privacy Seal

| Admission  | Discharge | Visit Type | Service         | Chief Complaint | Clinician                | Dx Category* | Dx Code* | Px Code* | Insurance Type* | Location* |
|------------|-----------|------------|-----------------|-----------------|--------------------------|--------------|----------|----------|-----------------|-----------|
| 12/05/2014 |           | Outpatient | Medical Service |                 | PHYSICIAN, GENERIC GENER | 800-999-99   | 822.1    | 27524    |                 | MMC       |
| 07/11/2014 |           | Emergency  | EMERGENCY ROOM  |                 | MARIAN BENNER            |              |          |          |                 | SH        |

# 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.

**Figure 10.** Mental Health Access Privacy Seal Process

The diagram illustrates the process for accessing sealed mental health information. On the left, a blue box with an information icon contains the text: "Certain sensitive patient information is not displayed due to legal restrictions. There may be protected mental health data available **Break Privacy Seal**". An arrow points from this box to a form titled "Access Sealed Information".

**Access Sealed Information**

If you are accessing this information in order to respond to a medical emergency, select "EMERGENCY CARE" as your reason in the drop down below. To access mental health information in a non-emergency situation, select your reason in the drop down below. By selecting a reason and clicking OK, you are confirming that you have explained to the patient, or their legal representative, that permission to access this information allows you to access it for an additional three days after each view to support follow up care related to this visit.

Access To \* ☐ I am responding to a medical emergency, or the patient or legal representative has consented to access as described above.

Reason \* Direct Patient Care - Ambulatory Care

Additional Information

I understand that this will be recorded and may be audited.

**Break Privacy Seal** Cancel

# Clinical Summary – Demographics

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

**Figure 11.** Demographics Component



| Demographics - CP8 |                                              | Primary Care Provider |                 |
|--------------------|----------------------------------------------|-----------------------|-----------------|
| Sex                | Male                                         | Name                  | Pianka Gretchen |
| Date of Birth      | Apr 28 2007 ( 13 years 1 month )             |                       |                 |
| Race               | Black                                        |                       |                 |
| Ethnicity          | Non-Hispanic                                 |                       |                 |
| Address            | 261 ODJEK TL EHL 5-5<br>EZOZDM ME 02570-6460 |                       |                 |
| Phone              | (509)473-9506                                |                       |                 |

| Emergency Contact |  |
|-------------------|--|
| Name              |  |

**Note:** For more information on patients' "Race" and "Ethnicity" information, see our Clinical Portal release notes (v.8.9.15.1) [here](#).

# 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

**Figure 12.** Allergies Component

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

# 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

**Figure 13.** Active Problems Component

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

# 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 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                                              | LISINAPRIL 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

| Encounter/Visit History |           |            |                 |                 |                           |              |          |          |                 |           |
|-------------------------|-----------|------------|-----------------|-----------------|---------------------------|--------------|----------|----------|-----------------|-----------|
| Admission               | Discharge | Visit Type | Service         | Chief Complaint | Clinician                 | Dx Category* | Dx Code* | Px Code* | Insurance Type* | Location* |
| 12/05/2014              |           | Outpatient | Medical Service |                 | PHYSICIAN, GENERIC GENERI | 800-999.99   | 822.1    | 27524    |                 | MMC       |
| 07/11/2014              |           | Emergency  | EMERGENCY ROOM  |                 | MARIAN BENNER             |              |          |          |                 | SJH       |



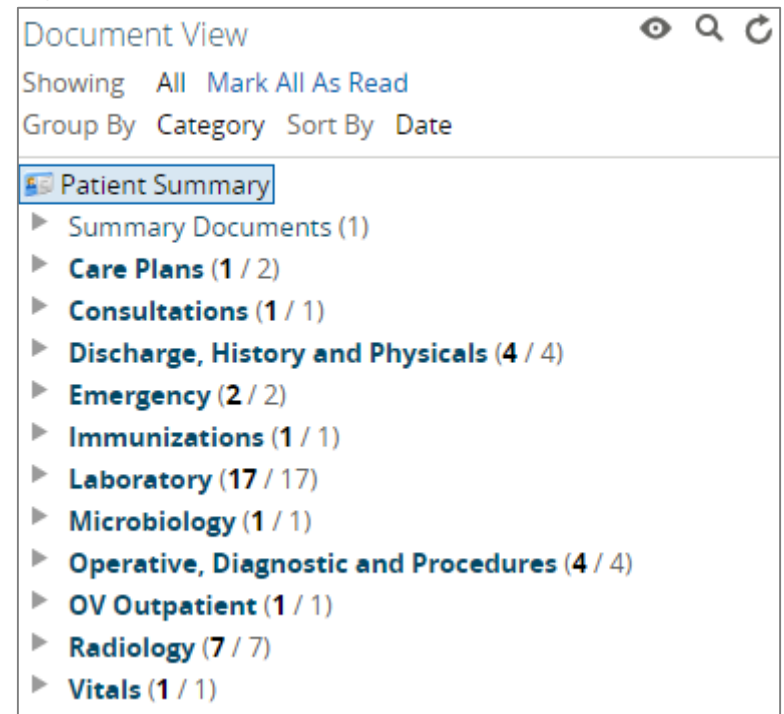
# Document View

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

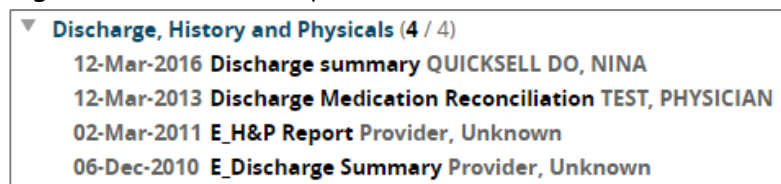
**Figure 16.** Document View Component



## Document View (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



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

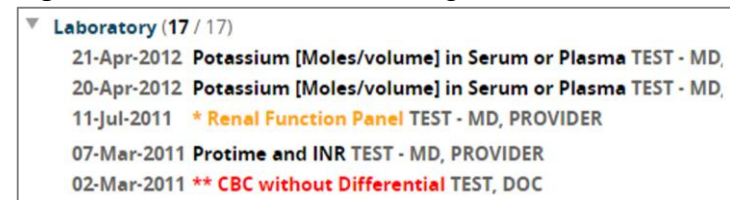
|                                       |                              |                          |                   |
|---------------------------------------|------------------------------|--------------------------|-------------------|
| <b>E_H&amp;P Report (9 years ago)</b> |                              |                          |                   |
| <b>E_H&amp;P Report</b>               |                              |                          |                   |
| Responsible Doctor                    | Provider, Unknown            | Observation Date         | 02-Mar-2011 00:00 |
| Hospital                              | Eastern Maine Medical Center |                          |                   |
| Patient DOB                           | 11-Sep-1952                  |                          |                   |
| Patient Name                          | HINTEST, Demo                |                          |                   |
| Patient MRN                           | HIN1234                      |                          |                   |
| Specimen                              |                              |                          |                   |
| <b>E_H&amp;P Report</b>               |                              | Final                    |                   |
| <b>EASTERN MAINE MEDICAL CENTER</b>   |                              | NAME: Testing, Heisemmc2 |                   |
| 489 State Street                      |                              | MRN: 1313241             |                   |
| Bangor, Maine 04401                   |                              | DOB: 12/10/1948          |                   |
|                                       |                              | FIN: 101409407           |                   |
|                                       |                              | ADMIT DATE: 03/02/2011   |                   |
|                                       |                              | UNIT/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

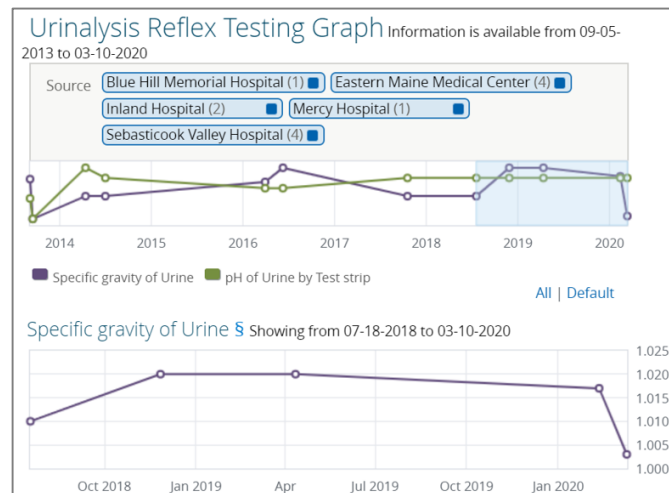
**Figure 19.** Document Color-Coding Function



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](#)).

**Figure 20.** Cumulative Results Graphing

[View Cumulative Results](#)



# Document View Functionality (cont.)

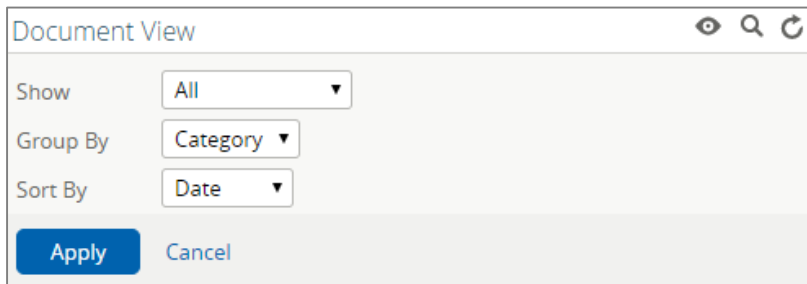
Contents contained in the "Document View" will vary by patient based on their specific encounters and/or data received from participating providers.

By selecting the eye icon  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  to search the repository by keyword ([Figure 22](#)).

**Figure 21.** Document Configuration Function



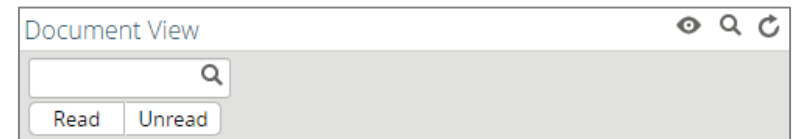
Document View   

Show

Group By

Sort By

**Figure 22.** Document Search Function



Document View   



# Veterans Affairs Record Search

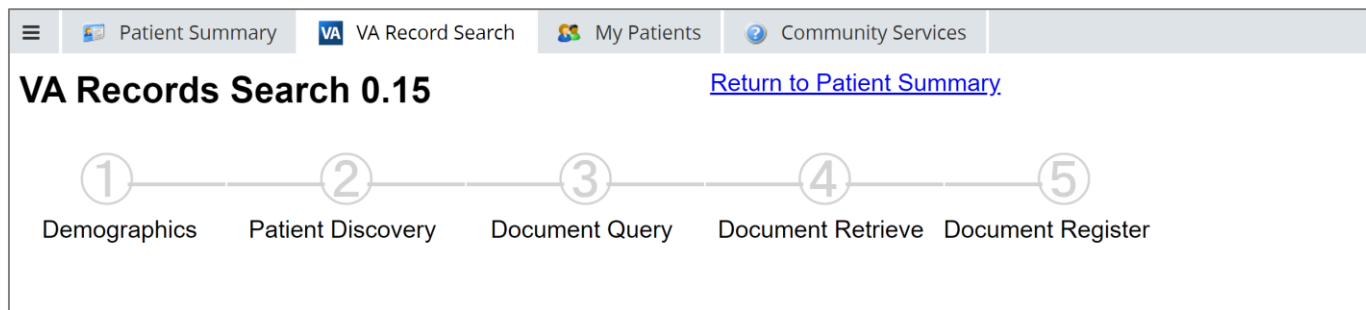
At the top of the "Patient Summary" view, the "VA Record Search" tab gives providers the opportunity to securely view and share health information from veterans' national health records included in the Veterans Affairs (VA) Virtual Lifetime Electronic Record Health Information Exchange (VLER HIE) initiative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

Certain sensitive patient information is not displayed due to legal restrictions. There may be protected mental health data available. [Break Privacy Seal](#)

Document View

Showing All [Mark All As Read](#)

Group By Category Sort By Date

**Patient Summary**

- Summary Documents (1 / 1)
- Laboratory (3 / 3)
- VA Documents (1)
  - SUMMARIZATION OF EPISODE NOTE  
07-11-2019 Consent to Share

**VA Records Search 0.12** [Return to Patient Summary](#) [Print](#)

**Department of Veterans Affairs Summarization of Episode Note**  
Created On: August 15, 2019

Female 3-Mar-1962 (DOB)  
1013315140V913383 (2:16:840.1.113883.4.349)  
55555 HOWARD ST  
LA JOLLA, CA, 92037  
(656)555-5555  
Electronically generated by Department of Veterans Affairs on August 15, 2019

**Allergies**

| Department of Veterans Affairs |                                  |                   | Business Rules for Construction of Medical Information |                                 |          |                                |
|--------------------------------|----------------------------------|-------------------|--------------------------------------------------------|---------------------------------|----------|--------------------------------|
| 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      |
| ASPIRIN RELATED MEDICATIONS    | Coded Allergy Name Not Available | 20151230145412    | Propensity to adverse reactions to drug                | • RASH                          | MODERATE | HUNTER HOLMES MCGUIRE HOSPITAL |
| CHOCOLATE                      | Coded Allergy Name Not Available | 20151221101852    | Propensity to adverse reactions to substance           | • RASH                          | MODERATE | HAMPTON VA MEDICAL CENTER      |
| IBUPROFEN                      | Coded Allergy Name Not Available | 20180717093040    | Propensity to adverse reactions to drug                | •                               |          | SAN DIEGO HCS                  |
| IMMUNE SERUMS                  | Coded Allergy Name Not Available | 20180829094819    | Propensity to adverse reactions to drug                | • ANAPHYLAXIS                   |          | SPARK M. MATSUNAGA VAMC        |
| IODINE CONTRAST EVEN WITH PREP | Coded Allergy Name Not Available | 20180917103205    | Propensity to adverse reactions to drug                | • DYSPNEA<br>• ANAPHYLAXIS      | SEVERE   | SPARK M. MATSUNAGA VAMC        |
| NONSTEROIDAL ANTI-INFLAMMATORY | Coded Allergy Name Not Available | 20100104183707    | Propensity to adverse reactions to drug                | • ABDOMINAL PAIN<br>• DIARRHEA  |          | SAN DIEGO HCS                  |
| PENICILLIN                     | Coded Allergy Name Not Available | 20100826113357    | Propensity to adverse reactions to drug                | • RASH<br>• NAUSEA AND VOMITING |          | EAST ORANGE-VA NEW JERSEY HCS  |
| RADIOLOGICAL CONTRAST MEDIA    | Coded Allergy Name Not Available |                   | Propensity to adverse reactions to drug                | • RASH                          |          | SAN DIEGO HCS                  |

# 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.

**Figure 26.** Community Services Tab View



| Provider                   | Date of Service | Code  | Type                                         | Description                       |
|----------------------------|-----------------|-------|----------------------------------------------|-----------------------------------|
| LOGISTICARE SOLUTIONS' LLC | 2019-11-25      | T2003 | NON-EMERGENCY TRANSPORTATION; ENCOUNTER/TRIP | Physician's office to a Residence |
| LOGISTICARE SOLUTIONS' LLC | 2019-11-25      | T2003 | NON-EMERGENCY TRANSPORTATION; ENCOUNTER/TRIP | Residence to a Physician's office |
| LOGISTICARE SOLUTIONS' LLC | 2019-11-19      | T2003 | NON-EMERGENCY TRANSPORTATION; ENCOUNTER/TRIP | Physician's office to a Residence |

**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

# 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:

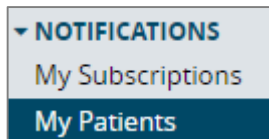
1. **Set up their "My Patients" settings** – Establish a list of patients to receive notifications on
2. **Set up their "My Subscriptions" settings** – Establish the types of events to receive notifications on for their defined list of patients

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](#)).

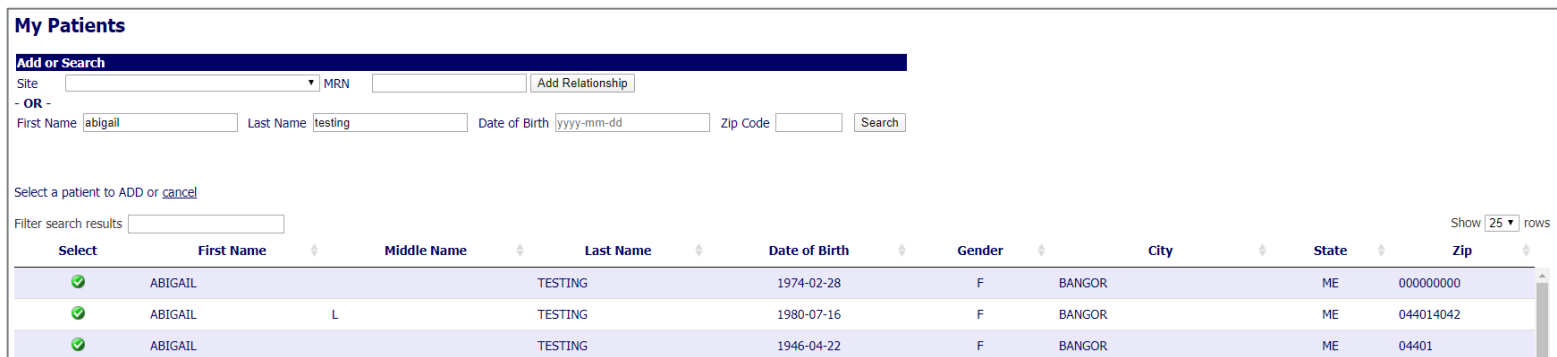
**Figure 27.** My Patients Option



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

A screenshot of the 'My Patients' search function interface. At the top, there's a header 'My Patients' and a sub-header 'Add or Search'. Below this, there are input fields for 'Site', 'MRN', and 'Add Relationship'. A separator '- OR -' is followed by input fields for 'First Name' (containing 'abigail'), 'Last Name' (containing 'testing'), 'Date of Birth' (with a date picker), 'Zip Code', and a 'Search' button. Below the search fields, there's a link 'Select a patient to ADD or cancel'. A 'Filter search results' input field is present. On the right, there's a 'Show 25 rows' dropdown. The main part of the interface is a table with columns: 'Select', 'First Name', 'Middle Name', 'Last Name', 'Date of Birth', 'Gender', 'City', 'State', and 'Zip'. There are three rows of patient data, each with a green checkmark in the 'Select' column.

| Select                              | First Name | Middle Name | Last Name | Date of Birth | Gender | City   | State | Zip       |
|-------------------------------------|------------|-------------|-----------|---------------|--------|--------|-------|-----------|
| <input checked="" type="checkbox"/> | ABIGAIL    |             | TESTING   | 1974-02-28    | F      | BANGOR | ME    | 00000000  |
| <input checked="" type="checkbox"/> | ABIGAIL    | L           | TESTING   | 1980-07-16    | F      | BANGOR | ME    | 044014042 |
| <input checked="" type="checkbox"/> | ABIGAIL    |             | TESTING   | 1946-04-22    | F      | BANGOR | ME    | 04401     |

# 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 |
|-----------------------------------------------------------------------------------|------------|
|  | 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 Patients**

**Add or Search**

Site  MRN

- OR -

First Name  Last Name  Date of Birth  Zip Code

Search patient panel

Show  rows

| Delete                                                                              | Patient Site | MRN                     | Patient Name     | Gender | Date of Birth | Start Date | End Date                                                                              |
|-------------------------------------------------------------------------------------|--------------|-------------------------|------------------|--------|---------------|------------|---------------------------------------------------------------------------------------|
|  | EMHS         | <a href="#">2230329</a> | TESTING, ABIGAIL | F      | 1974-02-28    | 2020-01-23 |  |

# 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

The screenshot shows the 'My Patients' module interface. At the top, there is a navigation bar with tabs: 'Patient Summary', 'VA Record Search', 'My Patients' (selected), and 'Community Services'. Below the navigation bar, the title 'My Patients' is displayed. Underneath, there is a section titled 'Add or Search'. This section contains a 'Site' dropdown menu set to 'HealthInfonet', an 'MRN' input field containing '12345678demo', and an 'Add Relationship' button.

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

The screenshot shows the 'My Patients' table interface. At the top, there is a section titled 'My Patients' with an 'Add or Search' bar. Below this, there are search filters: 'Site' (dropdown), 'MRN' (input), 'Add Relationship' button, and a search section with 'First Name', 'Last Name', 'Date of Birth' (format yyyy-mm-dd), 'Zip Code', and a 'Search' button. Below the search filters, there is a 'Relationship added' section with buttons: 'Delete Expired Relationships', 'Delete All Relationships', 'End Date for All', 'Edit All End Dates', 'Clear All End Dates', and 'Show Notifications'. Below this, there is a 'Search patient panel' input field and a 'Show 25 rows' dropdown. The table itself has columns: 'Delete', 'Patient Site', 'MRN', 'Patient Name', 'Gender', 'Date of Birth', 'Start Date', and 'End Date'. There are two rows of patient data.

| Delete | Patient Site | MRN                         | Patient Name     | Gender | Date of Birth | Start Date | End Date |
|--------|--------------|-----------------------------|------------------|--------|---------------|------------|----------|
|        | SJH          | <a href="#">SJHFAKE0011</a> | Notifier, Albert | M      | 1967-10-10    | 2020-02-27 |          |
|        | EMHS         | <a href="#">2230329</a>     | TESTING, ABIGAIL | F      | 1974-02-28    | 2020-01-23 |          |

# 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

**Figure 33.** "My Patients" Table Functionality

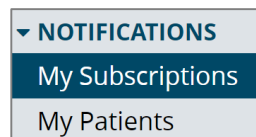
The image shows a series of UI elements for the 'My Patients' module. At the top is a search bar labeled 'Search patient panel' with a text input field. Below this is a button labeled 'End Date' with a dropdown arrow, and a button with a pencil icon. Further down are two buttons: 'End Date for All' and 'Edit All End Dates'. Below these are three more buttons: 'Clear All End Dates', 'Delete' (with a red 'x' icon), and 'Delete All Relationships'. At the bottom is a button labeled 'Delete Expired Relationships'.

# 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.

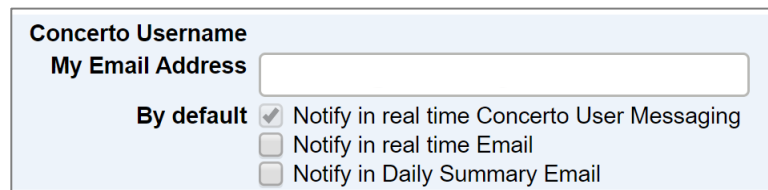
Within the "Notifications" main navigation function, located on the left-hand side of the screen, there is the option for users to configure their "My Subscriptions" settings ([Figure 34](#)).

**Figure 34.** My Subscriptions Option



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

A screenshot of a form titled 'Concerto Username'. It contains a label 'My Email Address' followed by a text input field. Below this is a section labeled 'By default' with three radio button options: 'Notify in real time Concerto User Messaging' (which is selected), 'Notify in real time Email', and '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 36](#)).

**Figure 36.** Notification Subscription Options

|                          |                                              |
|--------------------------|----------------------------------------------|
| <input type="checkbox"/> | <b>Notification</b>                          |
| <input type="checkbox"/> | Inpatient Admission                          |
| <input type="checkbox"/> | Inpatient Discharge                          |
| <input type="checkbox"/> | Patient is admitted to ER                    |
| <input type="checkbox"/> | Patient is discharged from ER                |
| <input type="checkbox"/> | SNF Unit Discharge                           |
| <input type="checkbox"/> | A new document (imaging report) is available |
| <input type="checkbox"/> | Final Radiology Report is available          |
| <input type="checkbox"/> | Final Laboratory Result is available         |
| <input type="checkbox"/> | Final Microbiology Result available          |
| <input type="checkbox"/> | Interim Microbiology Result available        |
| <input type="checkbox"/> | New COVID-19 Laboratory Result Available     |
| <input type="checkbox"/> | Patient Deceased                             |
| <input type="checkbox"/> | 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                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Inpatient Admission | <input checked="" type="checkbox"/> Notify in real time Concerto User Messaging<br><input type="checkbox"/> Notify in real time Email<br><input checked="" type="checkbox"/> Notify in Daily Summary Email<br><input type="button" value="OK"/> <input type="button" value="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 patient 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
2. 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](http://www.hinfonet.org)

You can access the HealthInfoNet Clinical Portal by visiting:

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



# 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
3. 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](http://www.hinfonet.org)

You can access the HealthInfoNet Clinical Portal by visiting:

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



# 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



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 | Patient Name     | MRN    | Point of Care     | Email Subject                               | Report Name |
|---------------------|---------|------------------|--------|-------------------|---------------------------------------------|-------------|
| 2019-11-21 12:31:09 |         | TESTLAB, PATHNET | 444005 | Bridgton Hospital | <a href="#">HealthInfoNet Daily Summary</a> | 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 | <a href="#">HealthInfoNet Daily Summary</a> | 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           |                  |              |                   |                                      |             |
|-----------------------------|------------------|--------------|-------------------|--------------------------------------|-------------|
| Search <input type="text"/> |                  | Show 25 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   |





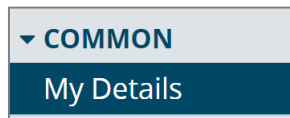
User Guide for the Clinical Portal  
(Version 8.9.15.2)

# User Account Services

# My Details

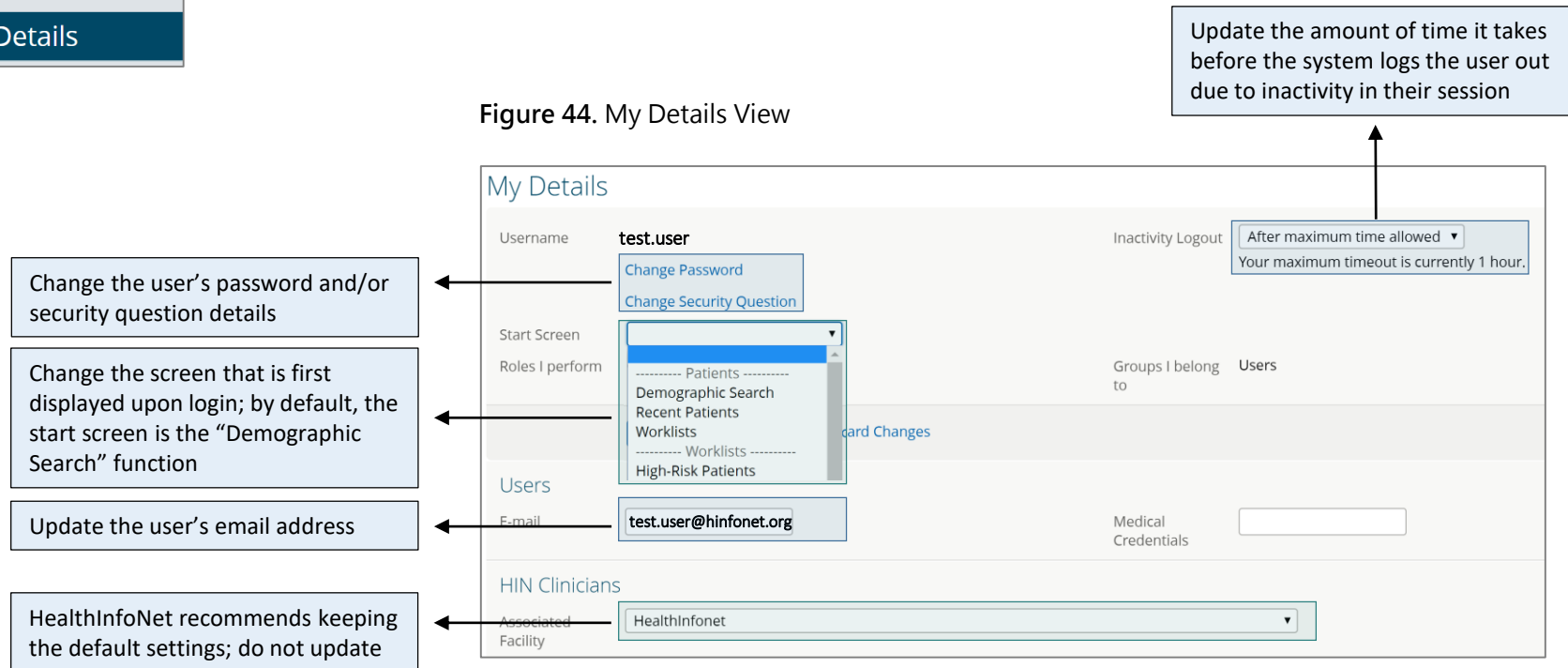
Within the "Common" main navigation function, located on the left-hand side of the screen, there is the ability for users to configure their user account settings by selecting the "My Details" option (Figure 43).

Figure 43. My Details Option



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

Figure 44. My Details View



# Additional Features & Functionality

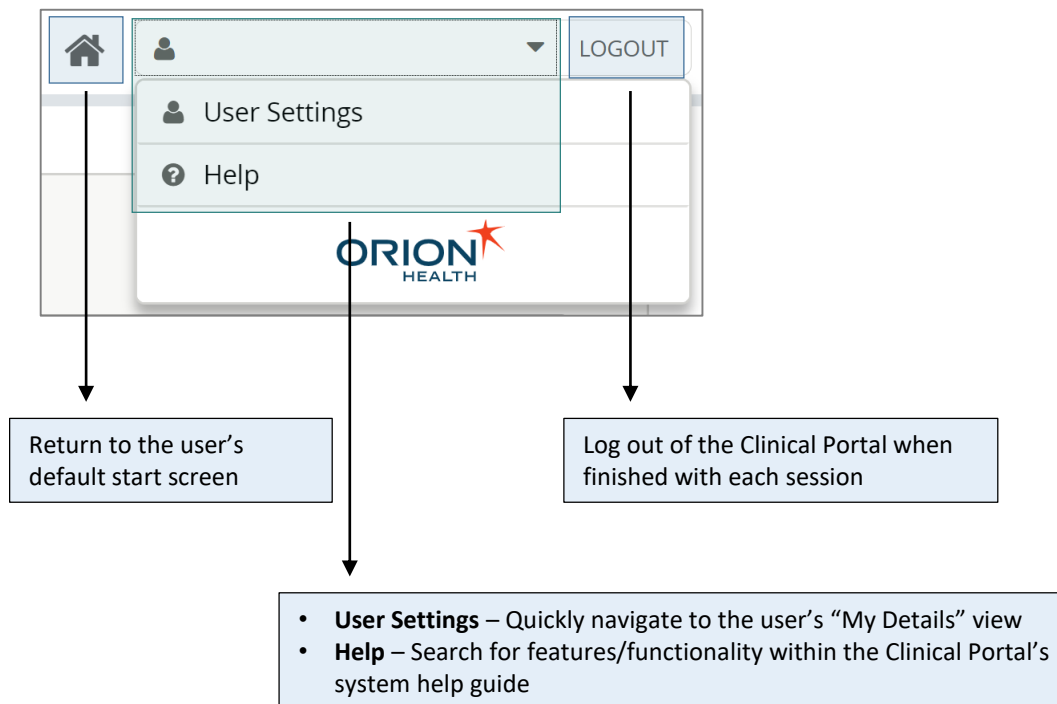


User Guide for the Clinical Portal  
(Version 8.9.15.2)

# 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 45](#)).

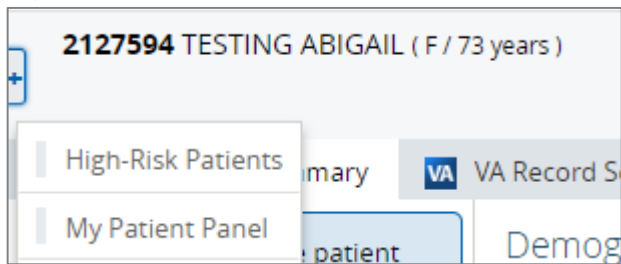
**Figure 45.** User Toggle Drop-Down View



# 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



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



# 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.

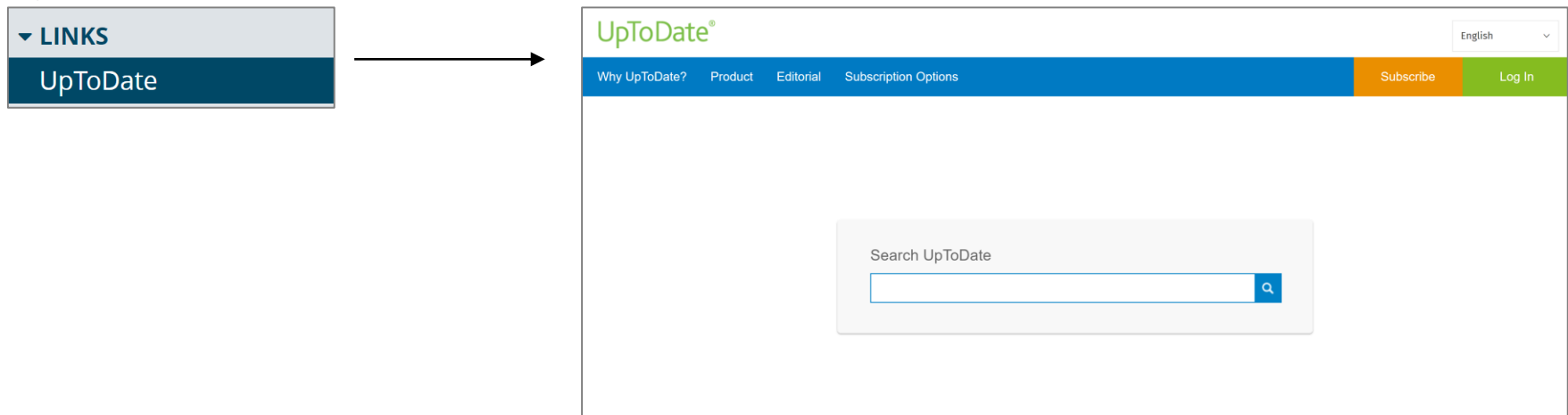
**Figure 48.** Patient Toggle Drop-Down View



# 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](#)).

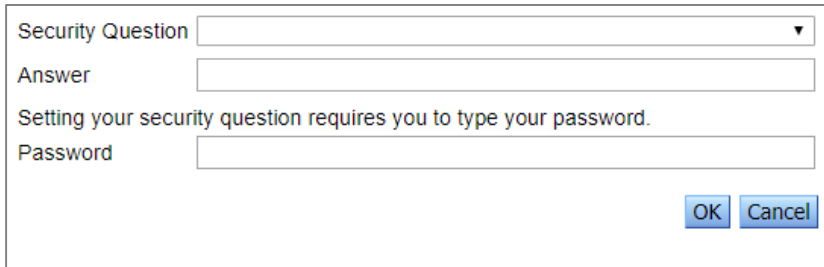
**Figure 49.** Links Function



# Password Reset Process

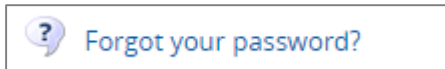
In order for users to be able to reset their passwords, they must proactively set a Security Question for their account. To do so, users can visit the "My Details" option within the "Common" main navigation function and select the "Set My Security Question" link ([Figure 50](#)).

**Figure 50.** Security Question Window

A screenshot of a web form titled "Security Question Window". It contains three input fields: "Security Question" (a dropdown menu), "Answer" (a text box), and "Password" (a text box). Below the "Answer" field, there is a message: "Setting your security question requires you to type your password." At the bottom right of the form, there are two buttons: "OK" and "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 [clienteducation@hinfonet.org](mailto: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



# Change Log

The following change log provides information about updates and revisions made to the Clinical Portal and this version of its user guide (for Clinician/IS Support user roles) ([Table 1](#)).

**Table 1.** User Guide Change Log (Clinician/IS Support user roles)

| Version  | Description                                                                                                                                                             | Effective Date |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| 8.9.15   | Released an updated format of the “User Guide for the Clinical Portal” for Clinician/IS Support user roles.                                                             | March 27, 2020 |
| 8.9.15.1 | Updated the Clinical Portal’s “Clinical Summary – Demographics” section in the Patient Summary view to include a patient’s self-reported race and ethnicity attributes. | June 8, 2020   |
| 8.9.15.2 | Updated the Clinical Portal’s “My Subscription” component to include a new notification type, “New COVID-19 Laboratory Result Available.”                               | July 15, 2020  |
|          |                                                                                                                                                                         |                |
|          |                                                                                                                                                                         |                |
|          |                                                                                                                                                                         |                |



[www.hinfo.net](http://www.hinfo.net)



[info@hinfo.net](mailto:info@hinfo.net)



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



207-541-9250



[@hinfo.net](https://twitter.com/hinfo.net)