

User Guide Clinical Portal

Table of Contents

- [Welcome to the Clinical Portal.....3](#)
- [About this User Guide.....4](#)
- [We're Here to Help.....5](#)
- [Account Setup & Initial Login.....6](#)
- [User Lookup Services.....10](#)
- [New User Request Function.....19](#)
- [User Account Services.....23](#)
- [Additional Features & Functionality.....25](#)
- [Clinical Education & Training Opportunities.....29](#)
- [Change Log.....30](#)



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.



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

About this User Guide

This Clinical Portal User Guide has been created for the Help Desk user role (Table 1). This user role has been designed to provide the appropriate self-service user account functionality required for help desk personnel and IT support teams to create and manage user accounts for their participating organization's access to the Clinical Portal.

Table 1. Help Desk User Role Description

User Role	Description	Common Job Titles With User Role
Help Desk	Access to user account functionality only	Help Desk Personnel



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:** customer care@hinfonet.org

Help Desk User Responsibilities

Help Desk users are trained by HealthInfoNet to be empowered to work with their respective organization's Clinical Portal users on issues and questions prior to reaching out to HealthInfoNet's Customer Support team. When reaching out to the Customer Support team, keep in mind the appropriate prioritization of requests:

Priority 1: Urgent Issues

- Represents emergency problems in a production environment that have no hardware or software workarounds and that directly impact critical daily operation of your facility
- HealthInfoNet support is available both during and after regular business hours

Priority 2: Non-Urgent Issues

- Represents non-emergency problems, have a hardware or software workaround, or are related to system application or implementation
- HealthInfoNet support is available only during regular business hours





User Guide for the Clinical Portal
(Version 8.9.15.1)

Account Setup & Initial Login

Account Authorization

To obtain access to the Clinical Portal online user interface:

1. New users must contact the authorized Help Desk user who has been designated by their organization as the individual responsible for creating new user accounts.
 - a. If the user's organization does not have an authorized Help Desk user, contact HealthInfoNet's Customer Support team at customercare@hinfonet.org.
2. Once the authorized Help Desk user, or HealthInfoNet's Customer Support team, has established the new user's account in the system, a welcome email will be sent to the new user with information on how to access the Clinical Portal interface.

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



Initial Login Workflow

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

1. Follow the instructions in the welcome email and click the link to visit the Clinical Portal.
 - a. Clinical Portal URL: <https://maine.hinfonet.org/concerto/Login.htm>
2. Once their browser has opened and the Clinical Portal login page has loaded, users can enter their designated User ID and temporary Password into the provided login fields.
3. Selecting the "Login" button will next prompt users to reset their temporary password to one of their own choosing and which meets the system's password complexity requirements.
 - a. Note: New users will be required to reset their passwords for security purposes upon their first login and every 90 days thereafter.
4. Finally, new users will be required to accept the "Treatment Portal" and "Medication History" disclaimers upon their first login.
5. New users will then be approved to enter the portal.

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

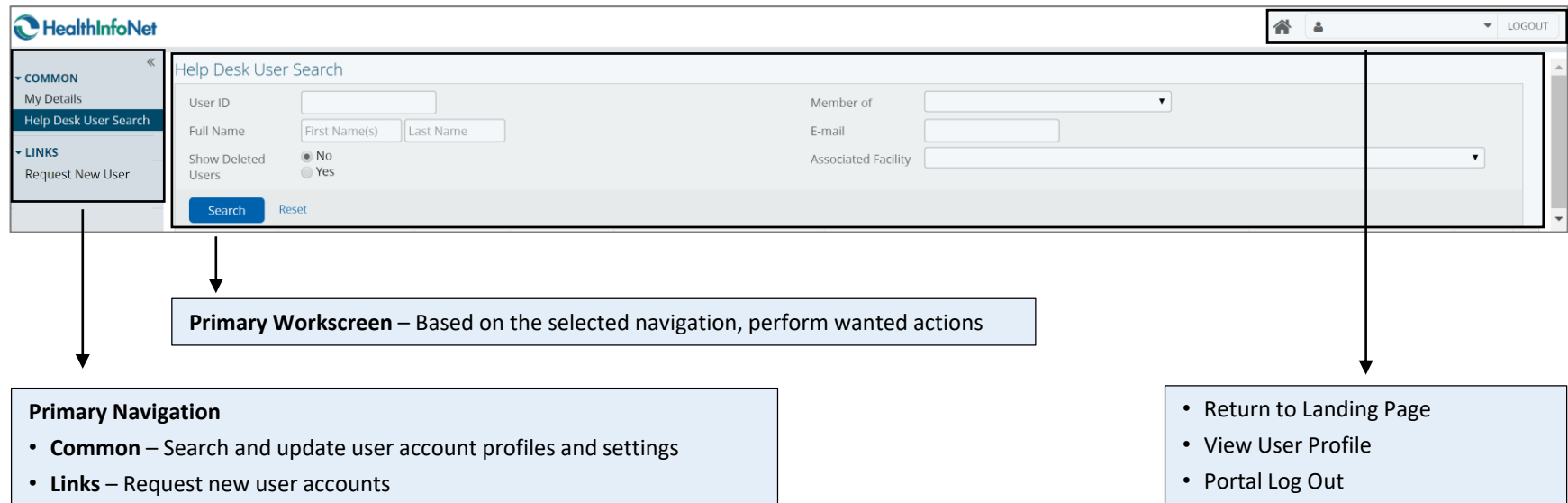


Landing Page

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

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

Figure 1. User Interface Landing Page





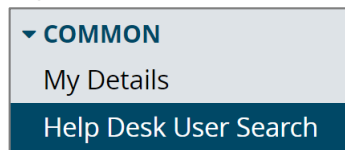
User Guide for the Clinical Portal
(Version 8.9.15.1)

User Lookup Services

User Search Function

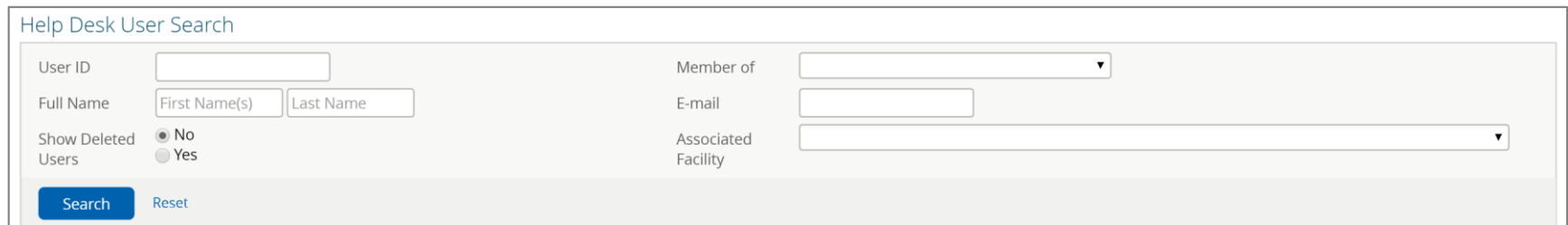
Within the "Common" main navigation function, located on the left-hand side of the screen, there is the ability for users to search for other credentialed users in the system by selecting the "Help Desk User Search" option ([Figure 2](#)).

Figure 2. Help Desk User Search Option



Simply populate the available search criteria for the wanted user and select the "Search" button to retrieve results ([Figure 3](#)).

Figure 3. User Search Function

A screenshot of the 'Help Desk User Search' form. The form has a title 'Help Desk User Search' at the top left. It contains several search criteria fields: 'User ID' (a single text input), 'Full Name' (two text inputs for 'First Name(s)' and 'Last Name'), 'Show Deleted Users' (radio buttons for 'No' and 'Yes', with 'No' selected), 'Member of' (a dropdown menu), 'E-mail' (a text input), and 'Associated Facility' (a dropdown menu). At the bottom left are two buttons: 'Search' (blue) and 'Reset' (light blue).

User Search Function (cont.)

When results return, there may be more than one user that meets the provided search criteria. To confirm that the correct user is selected, Help Desk users can review the details associated with each resulting record ([Figure 4](#)).

Key fields included in the search results view include the following:

1. **Name** – The user's first and last names
2. **Email** – The user's email address
3. **Description** – Any notes entered about the user
4. **Associate Facility** – The facility at which the user works/is authorized on behalf of

Figure 4. User Search Results

Help Desk User Search

User ID

Member of

Full Name

First Name(s)

Last Name

E-mail


Show Deleted Users

☒ No☐ Yes

Associated Facility

Search

Reset

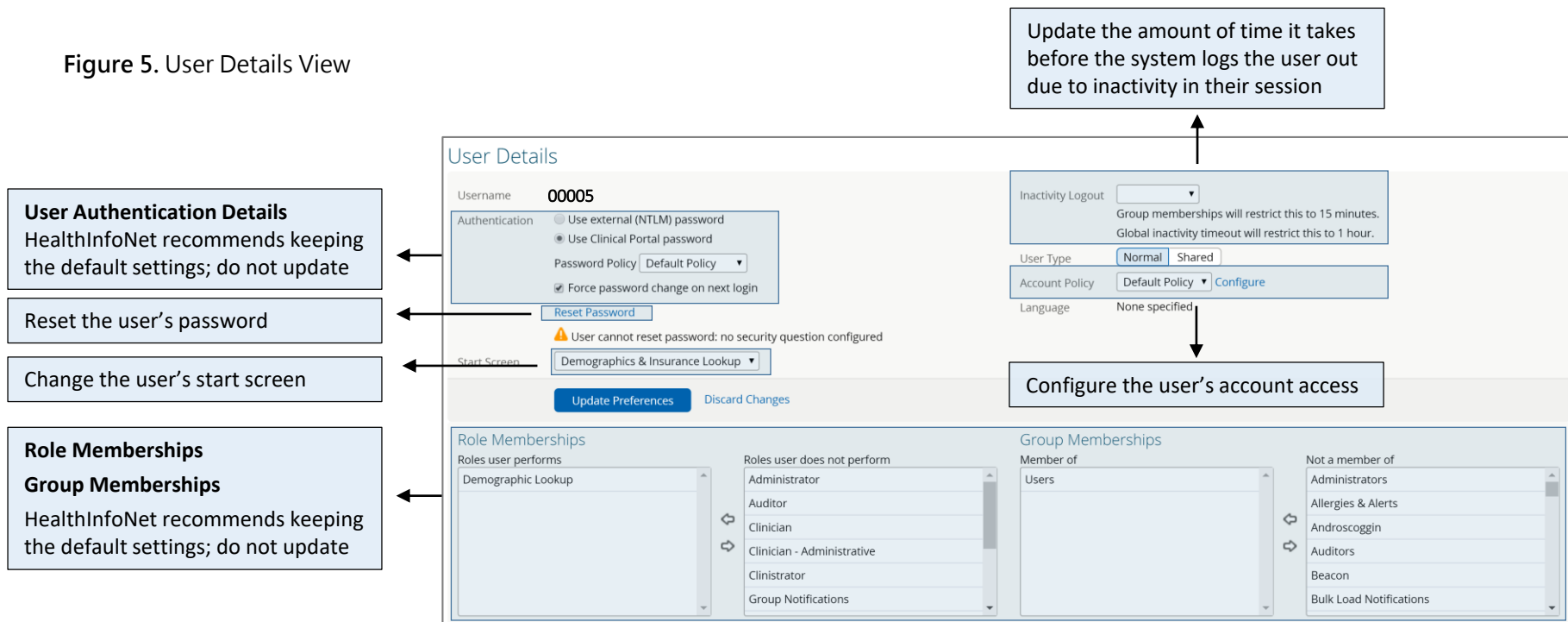
User ID	Full Name	Family Name	Given Name(s)	E-mail	Description	Associated Facility	Deleted	
00005	Test User	User	Test	testuser@hinfonet.org	This is a HealthInfoNet test user	HealthInfoNet	0	

User Details View

Upon entering the wanted user's record, Help Desk users will be brought to the "User Details" view, which provides detailed account information for the selected user.

Core components featured in the "User Details" view are outlined below ([Figure 5](#)).

Figure 5. User Details View



User Details View (cont.)

Figure 6. User Details View (cont.)

User Information
Update the user's Full Name, E-Mail, and Medical Credential; enter a note about the user for reference

Clinician Homepage Settings
HealthInfoNet recommends keeping the default settings; do not update

Users

Description

E-mail

Medical Credential

Full Name

Clinician Homepage

Worklist to show on My Homepage

My Inpatients List A

Your list name

☒ Include on Homepage

Clicking a blue plus adds items

My Inpatients Location

Clicking a blue plus adds items

My Inpatients List B

Your list name

☒ Include on Homepage

Clicking a blue plus adds items

Show my Outpatients for Today

User Details View (cont.)

Figure 7. User Details View (cont.)

User Associated Facility
HealthInfoNet recommends keeping the default settings; do not update

Miscellaneous Settings
HealthInfoNet recommends keeping the default settings; do not update

HIN Clinicians

Associated Facility

Notifications

My EMR

DirectEmail

Patient Search & Demographics

My preferred Patient ID Type

Results Viewer

Sign Off Allowed

VIP Users

Credential ID

User External Identifiers

External Identifier Type	Value
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Update Preferences

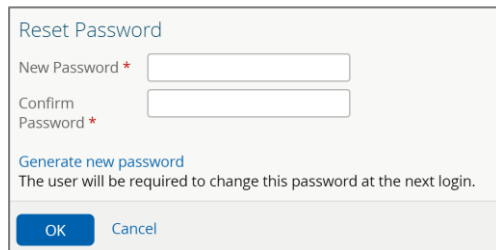
Discard Changes

Once Help Desk users have updated all wanted details of a user's account, they must click on the "Update Preferences" button located at the bottom of the form to confirm their changes.

Common Reasons for Managing User Accounts

1. **Password Resets** – For users that are unable to do so themselves through the self-service password reset function located on the login screen, Help Desk users can reset individual users' passwords IF those users have already set a security question in the system. To do so, simply select the "Reset Password" hyperlink from the selected user's "User Details" view ([Figure 8](#)).

Figure 8. Password Reset Functionality



The screenshot shows a dialog box titled "Reset Password". It contains two input fields: "New Password *" and "Confirm Password *". Below these fields is a link that says "Generate new password" and a note: "The user will be required to change this password at the next login." At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. **Update User Contact Information** – In the event that a user's basic contact information changes over time, Help Desk users can update that user's full name, email address, and/or medical credential, as well as enter a note for future reference. Note: HealthInfoNet's Customer Care team may also choose to enter notes about individual users, especially if their accounts have been disabled, which will be transparent to Help Desk users ([Figure 9](#)).

Figure 9. Contact Information Update Functionality



The screenshot shows a form titled "Users". It has several input fields: "Description" (a large text area), "E-mail" (a text field), "Medical Credential" (a text field), "Full Name" (which includes sub-fields for "First Name(s)" and "Last Name"), and a "Note" field (a large text area).

Common Reasons for Managing User Accounts (cont.)

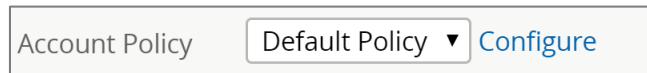
3. **Modify User Account Access** – The Clinical Portal indicates whether a user is no longer active in the system by displaying a message at the top of their "User Details" view ([Figure 10](#)).

Figure 10. User Account Not Active Message



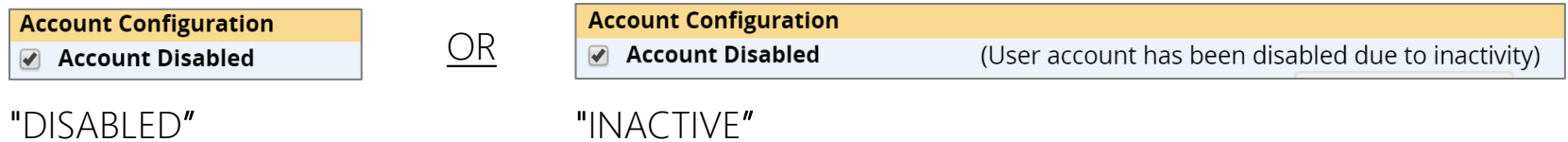
Help Desk users can learn more about the reason behind why the user's account is no longer active by selecting the "Configure" hyperlink in the "Account Policy" section of the "User Details" view ([Figure 11](#)).

Figure 11. User Account Access Configuration



Within the "Account Configuration" window that appears, the "Account Disabled" option will be checked and an additional message may or may not appear depending on the type of access limitation in place ([Figure 12](#)).

Figure 12. User Account Not Active Messages – Disabled versus Inactive



Common Reasons for Managing User Accounts (cont.)

Non-active accounts are categorized as being:

- a. **Disabled** – Accounts that have been flagged by either a Help Desk user or HealthInfoNet's Customer Support team to indicate that the selected user should never regain access to the Clinical Portal, unless with documented exceptions. The "Description" field in the user's "User Details" view should also be used to note the reason(s) for disabling the user's account in addition to checking the "Account Disabled" checkbox.
 - HealthInfoNet recommends never re-activating a "Disabled" account without first reaching out to our Customer Support team.
 - However, Help Desk users should feel empowered to disable users due to them no longer working at their organization, compromised accounts, account maintenance, etc.
- b. **Inactive** – Accounts that have been automatically flagged by the Clinical Portal after 180 consecutive days of no use by the selected user. Help Desk users can simply uncheck the "Account Disabled" checkbox and confirm their changes by clicking on the "OK" button at the bottom of the form to re-activate the selected user's account.



New User Request Function

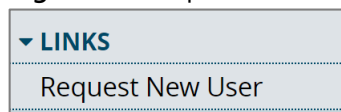


User Guide for the Clinical Portal
(Version 8.9.15.1)

Request New User Function

Within the "Links" main navigation function, located on the left-hand side of the screen, there is the ability for users to establish accounts in the Clinical Portal for new users on behalf of their organization by selecting the "Request New User" option ([Figure 13](#)).

Figure 13. Request New User Option



Request New User Form

Upon selecting the option, a "New User Request Form" will appear. Once Help Desk users have completed all required fields for the new user, they will be prompted to enter the appropriate email address(es) to send the new user their credentials to access the system ([Figure 14](#)).

Figure 14. Request New User Form

New User Request Form	
Fields marked with "*" are required	
*First Name:	<input type="text"/>
*Last Name:	<input type="text"/>
*User ID:	<input type="text"/>
*User Email:	<input type="text"/>
*HIN Role:	<div> <input checked="" type="radio"/> Clinical (Access to all patient information) <input type="radio"/> Clinician - Admin (Access to all patient information) <input type="radio"/> Clerical (Access limited to demographics) <input type="radio"/> Auditor (Access limited to audit reports) <input type="radio"/> Help Desk (Access limited to user maintenance) <input type="radio"/> IS Support (IS Support) </div>
*Title/Job:	<input type="text"/>
*Medical Credentials:	Medical Doctor ▼
*Hospital or Practice Affiliation:	Select One ▼
*Environments:	<input checked="" type="checkbox"/> Live System <input type="checkbox"/> Test
Authorized by:	<input type="text"/>
Continue..	

Please enter the email address where we should send the temporary password.

Email*:

Verify Email*:

The following fields are OPTIONAL. Complete ONLY if you would like us to send a cc email.

CC Email Address (optional):

Verify CC Email Address:

☒ Check Email format
 ☐ Do not check email format

Submit

Once new user accounts have been submitted by Help Desk users, HealthInfoNet will finalize the account setup by authenticating the new users and sending them their credentials to access the system.

User Role Options

One of the most important settings to complete correctly in establishing new user accounts is the "HIN Role" field. Within the Clinical Portal, there are six (6) different user roles to consider ([Table 2](#)).

Table 2. Clinical Portal User Role Options

User Role	Description	Examples of Job Titles With User Role
Clinician	<ul style="list-style-type: none">• Access to all patient information• Access to comprehensive clinical functionality	Medical Doctor, Doctor of Osteopathy, Nurse Practitioner, Physician Assistant
Clinician Administrative	<ul style="list-style-type: none">• Access to all patient information• Access to comprehensive clinical functionality	Registered Nurse, Licensed Practical Nurse, Medical Assistant, Nurse Assistant, Respiratory Therapist, Registered Pharmacist, Case Manager
Clerical/Demographic Lookup	<ul style="list-style-type: none">• Access to only patient demographic information• Access to comprehensive clinical functionality	Ambulance Technician, Unit Secretary, Medical Records Staff
Auditor	Access to audit reporting functionality only	Privacy/Compliance Officer, Privacy/Compliance Support Staff
Help Desk	Access to user account functionality only	Help Desk Personnel
IS Support	<ul style="list-style-type: none">• Access to all patient information• Access to comprehensive clinical functionality	IT/IS Support Staff



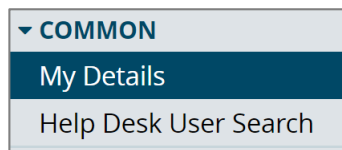
User Guide for the Clinical Portal
(Version 8.9.15.1)

User Account Services

My Details

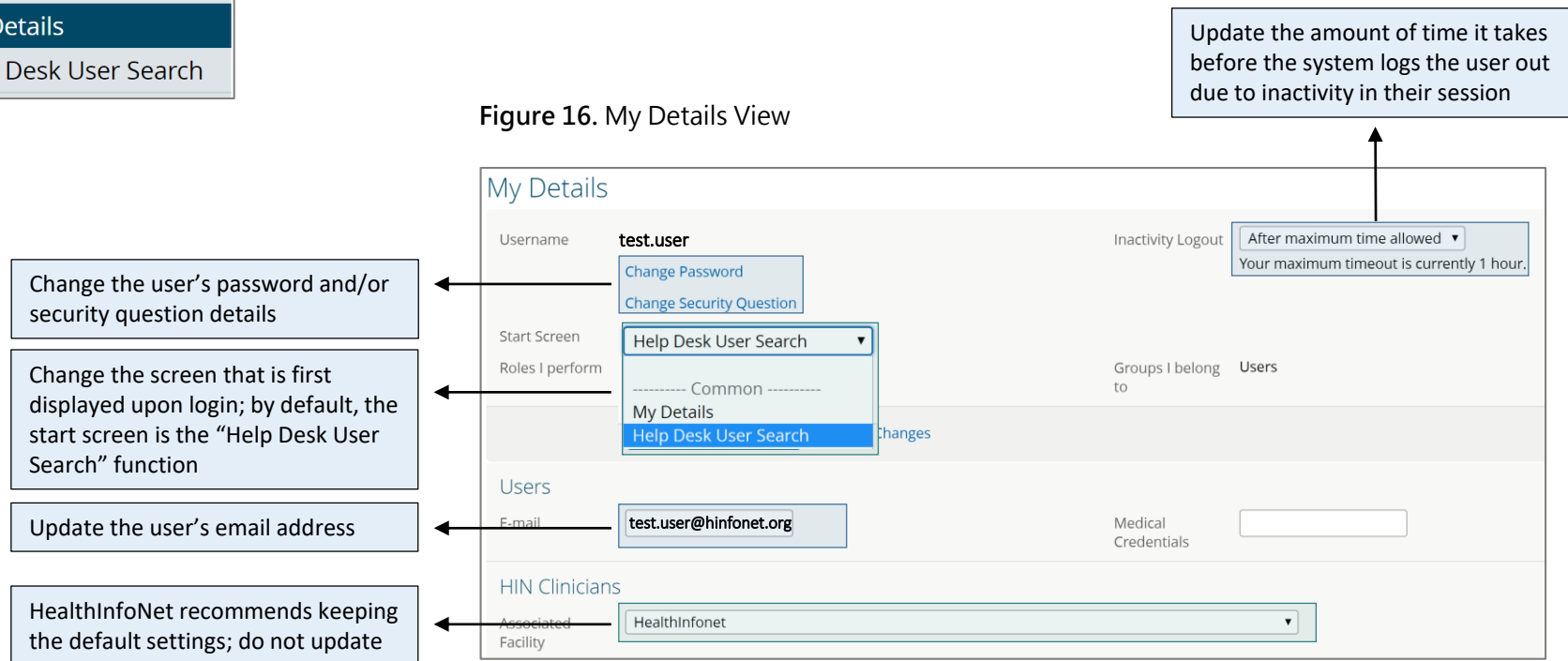
Within the "Common" main navigation function, located on the left-hand side of the screen, there is the ability for Help Desk users to configure their user account settings by selecting the "My Details" option ([Figure 15](#)).

Figure 15. My Details Option



Important functionality in the "My Details" view for users to review and consider are outlined below ([Figure 16](#)).

Figure 16. My Details View



Additional Features & Functionality

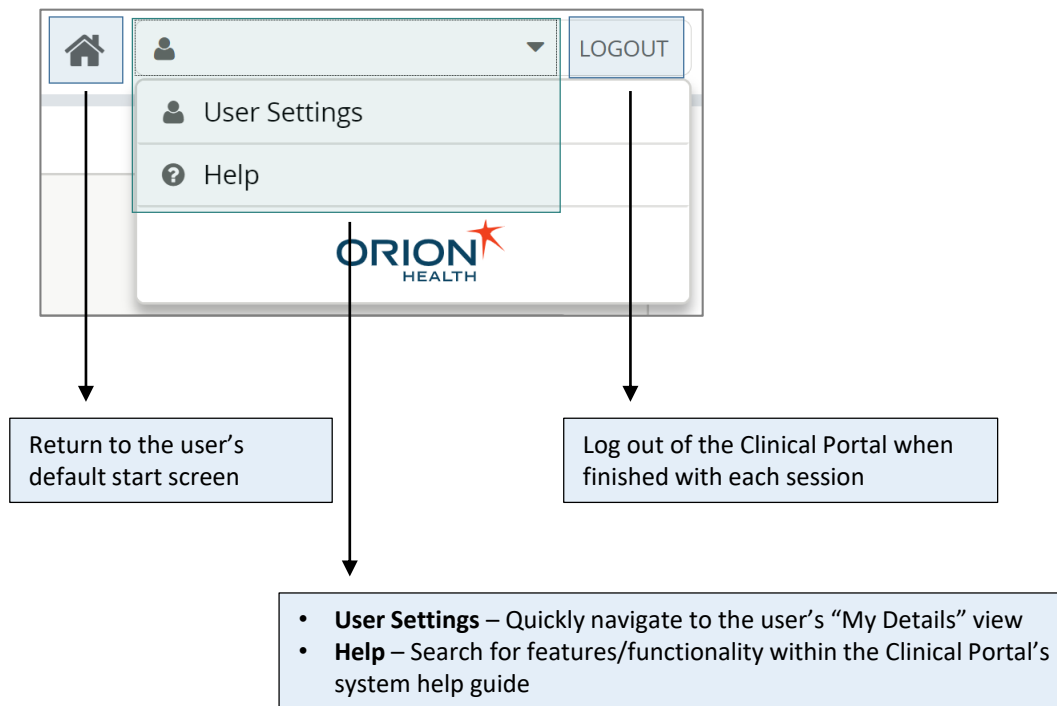


User Guide for the Clinical Portal
(Version 8.9.15.1)

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 17](#)).

Figure 17. User Toggle Drop-Down View



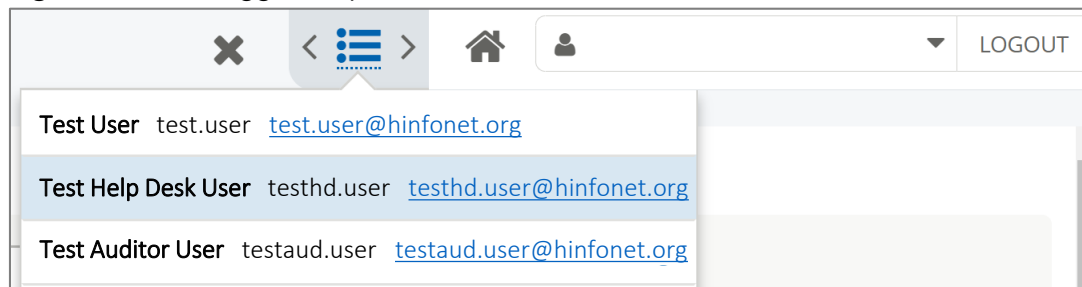
User Toggle

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

To do so, Help Desk 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 users corresponding to the original search ([Figure 18](#)).

Help Desk users can then select another user from the results to view that newly selected user's information.

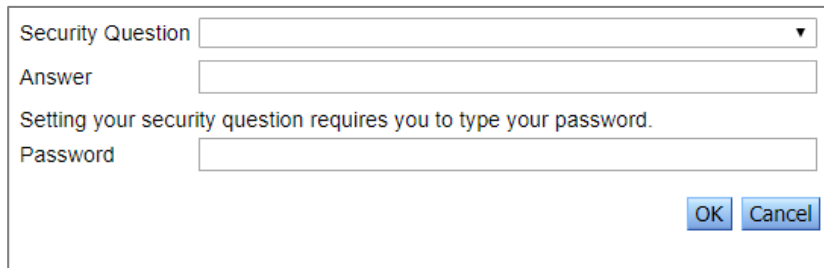
Figure 18. User Toggle Drop-Down View



Password Reset Process

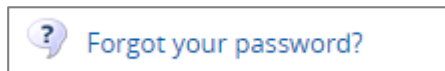
In order for users to be able to reset their passwords, they must proactively set a Security Question for their account. To do so, users can visit the "My Details" option within the "Common" main navigation function and select the "Set My Security Question" link ([Figure 19](#)).

Figure 19. 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 20](#)).

Figure 20. 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 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 Help Desk user roles) ([Table 1](#)).

Table 1. User Guide Change Log (Help Desk user roles)

Version	Description	Effective Date
8.9.15	Released an updated format of the “User Guide for the Clinical Portal” for Help Desk user roles.	March 27, 2020
8.9.15.1	Removed all references to the Veterans Health Information Exchange (VHIE) integration functionality, per HealthInfoNet’s decision to avoid end-user confusion and miscommunication while a plan to restore VHIE connectivity is pursued.	December 4, 2020





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