User Guide
Clinical Portal

HealthInfoNet

Clinician User Role
IS Support User Role

Table of Contents

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.

We're Here to Help

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

Contact Us Directly

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

Support at Your Facility

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

Account Setup & Initial Login

User Guide for the Clinical Portal
(Version 8.9.15.4)

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:

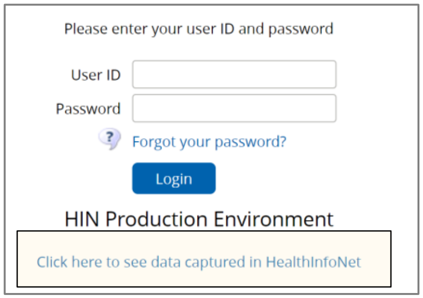
1. Follow the instructions in the welcome email and click the link to visit the Clinical Portal.
   a. Clinical Portal URL: https://maine.hinfonet.org/concerto/Login.htm
2. Once their browser has opened and the Clinical Portal login page has loaded, users can enter their designated User ID and temporary 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.

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



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.hinfonet.org/static/HealthInfoNet_data_Coverage.pdf

HealthInfoNet

Data Coverage

Available Data	Not Applicable	Recent Additions
✓	—	✓

Revised 2/11/2020

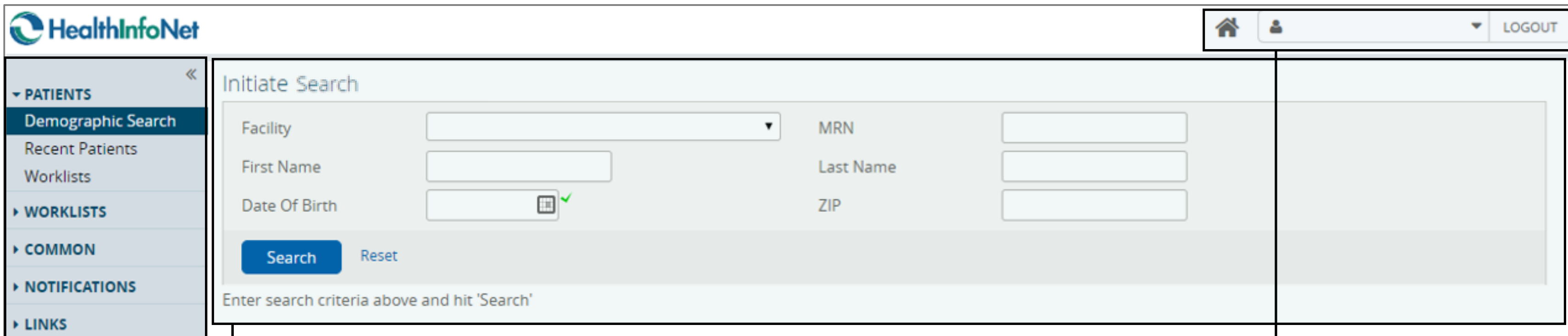
Hospitals & Health Systems	Hospital Inpatient & Emergency	Discharge Summaries	Emergency Reports	History & Physicals	Hospital Outpatient	Consultations	OP Visit Documents	Ambulatory	Office Visit Notes	Common Data Categories	Allergies	Anatomical Pathology	Care Plans	CCDs	Chief Complaint	Demographics	Diagnosis Codes [1]	EKG	Encounters	Immunization	Medications (SureScripts/MaineCare)	Operative, Diagnostic, Procedure Documents	Payer Category	PCP	Procedure Codes [1]	Problem List	Radiology Reports	Other Documents	Vitals	Laboratory	Internal Laboratory [2]	Microbiology (Cultures)	Affiliated Lab (ALI)	Dahl Chase	NorDx	Quest
Calais Regional Hospital																																				
Calais Regional Hospital - Ambulatory		–	–	–		–	–					–			–						✓															
Calais Regional Hospital - Inpatient & Outpatient		✓	✓	✓		✓	✓		–		✓			–	✓	✓	✓		✓		✓	✓	✓	✓	✓	–	✓	✓	–		✓	✓	✓			
Cary Medical Center																																				
Cary Medical Center - Ambulatory		–	–	–		–	–					–			–						✓															

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



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

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

Primary Navigation

- **Patients** – Search and view individual patient records
- **Worklists** – Organize and monitor patients of interest
- **Common** – Update user account profile and settings
- **Notifications** – Configure notification services for specific patient panels
- **Links** – Access additional value-add resources

Patient Lookup Services

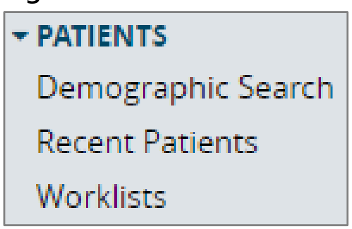
User Guide for the Clinical Portal (Version 8.9.15.4)

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



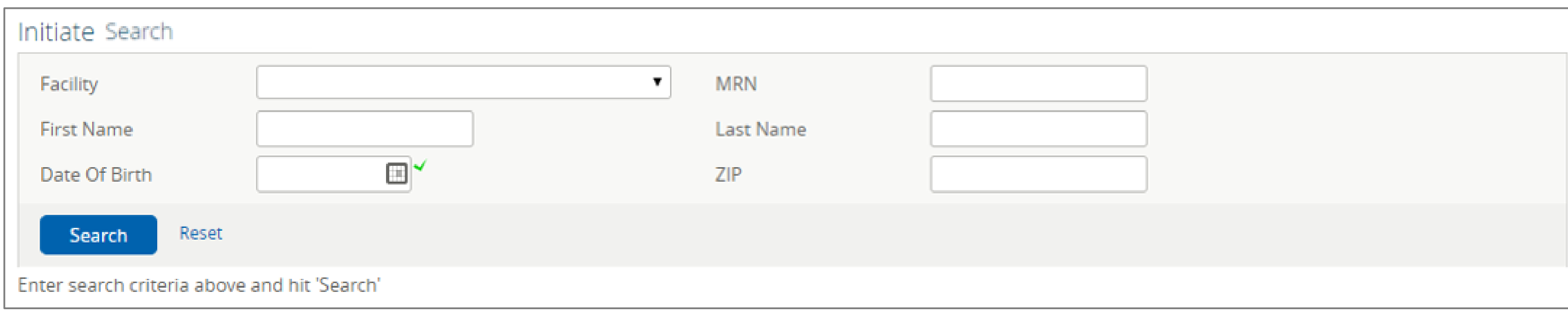
Demographic Search

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



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

Search Reset

		Last Name	First Name	MI	Date Of Birth	SEX	CITY	STATE	ZIP	Opt-out Date	Mental Health Consent	HIV Consent
		DEMO	HINTEST		09-Jul-1948	F	PORTLAND	ME	04103			
		Hintest	Demo		11-Sep-1952	M	Portland	ME	04103			

Add checked results to worklist ▾ Replace worklist with checked results ▾

Patient Consent Choices

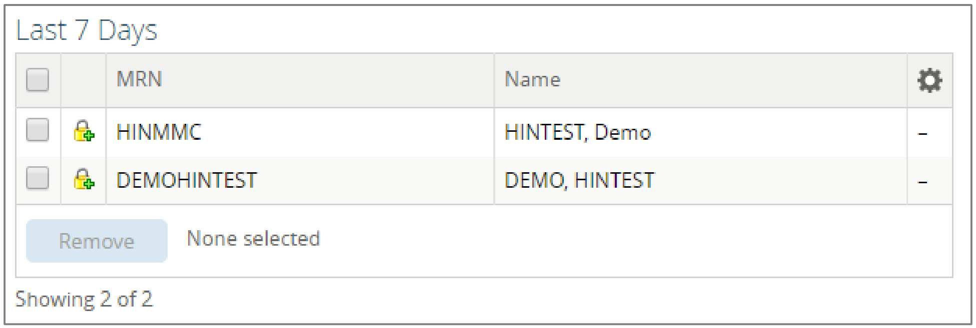
In the State of Maine, the following patient consent choices are in place:

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.

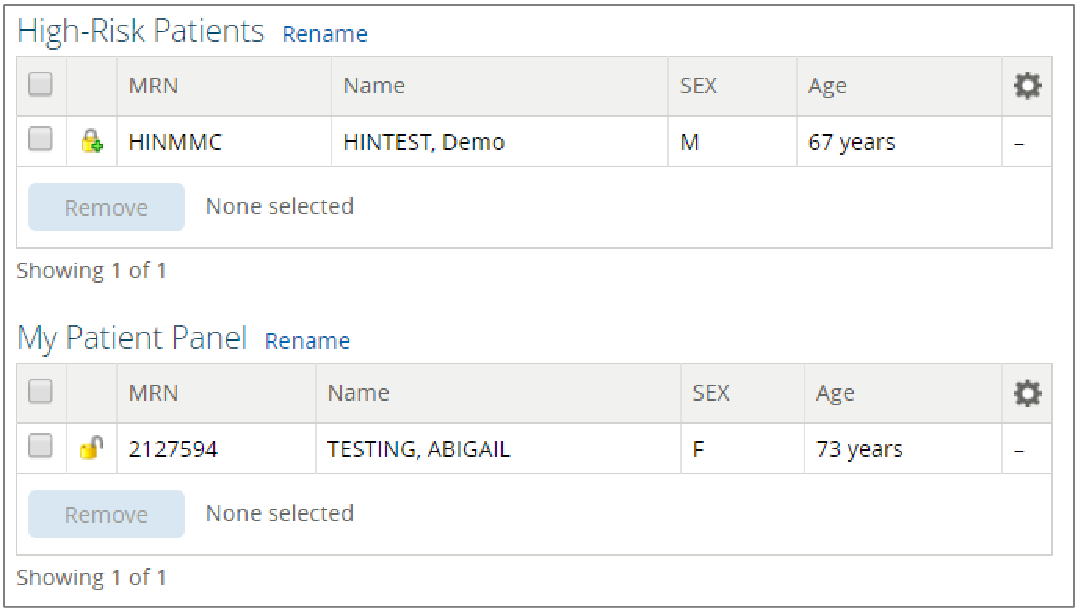
Figure 6. Recent Patients View



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



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.

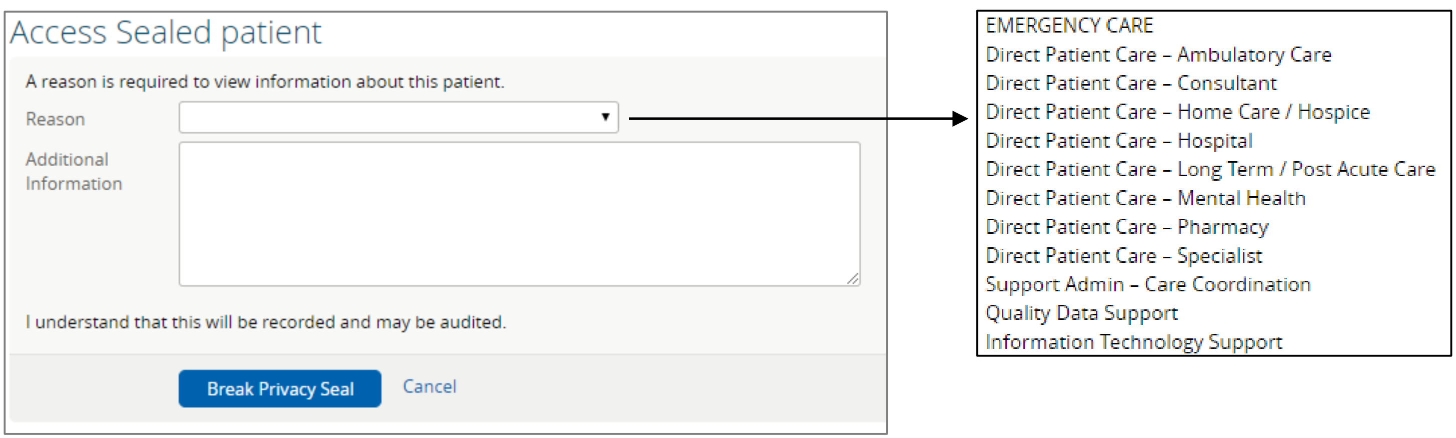
Patient Record Access Request

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



Patient Record Services

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).

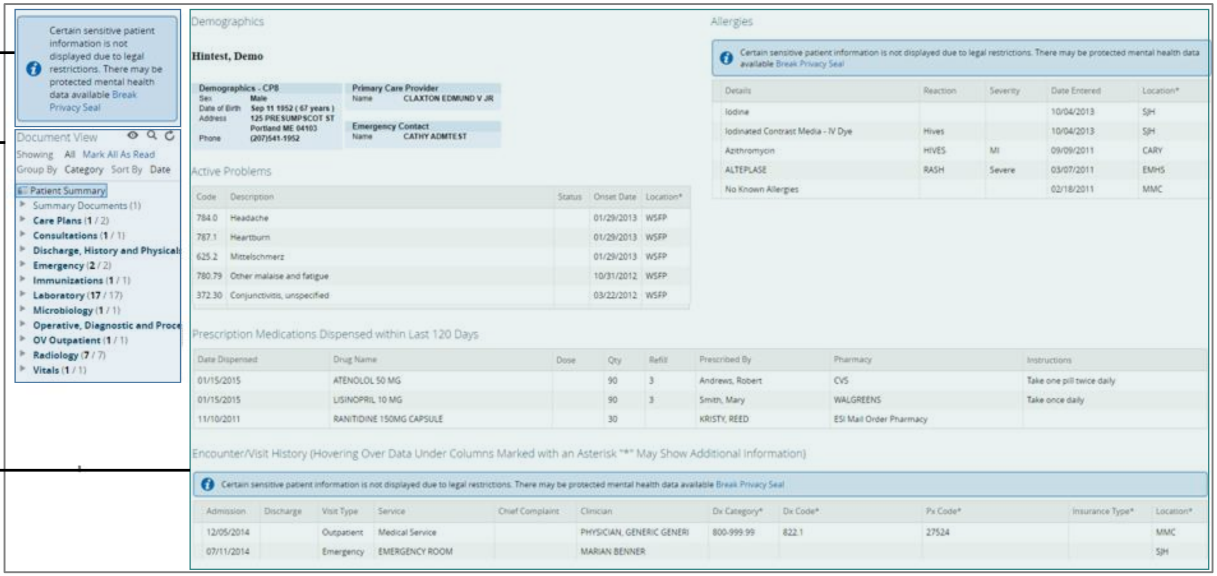
Figure 9. Patient Summary View

Mental Health Access Privacy Seal

Clinical Document View

Clinical Summary

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



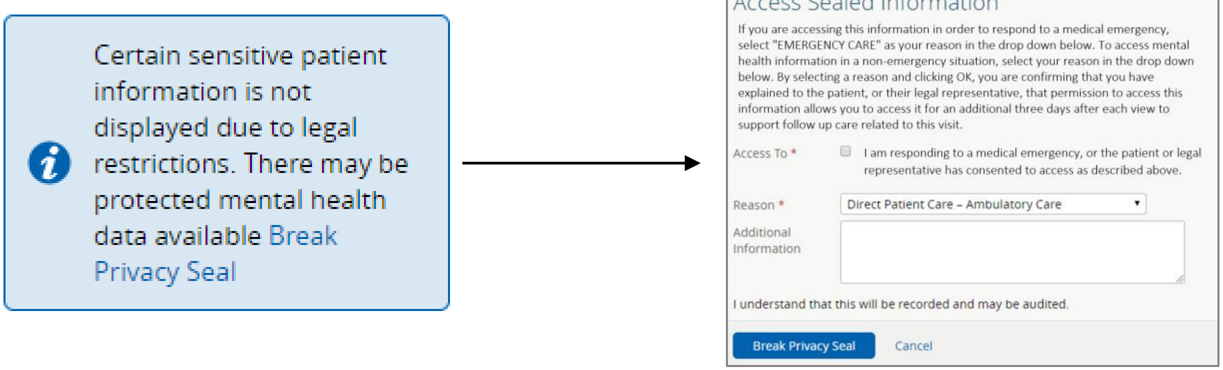
Mental Health Access Privacy Seal

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



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

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	LISINOPRIL 10 MG		90	3	Smith, Mary	WALGREENS	Take once daily

Clinical Summary – Encounters/Visit History

Beneath the "Medication Management" component is the "Encounters/Visit History" component (Figure 15). This component provides a list containing all of the selected patient's encounters/visits over time. 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; where the "Source" of the encounter information is from a healthcare payer, the "Service" field will capture the name of the healthcare provider
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. Source – The location from which the patient's encounter information was received by HealthInfoNet (i.e., the data-sharing entity)

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*	Source*
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

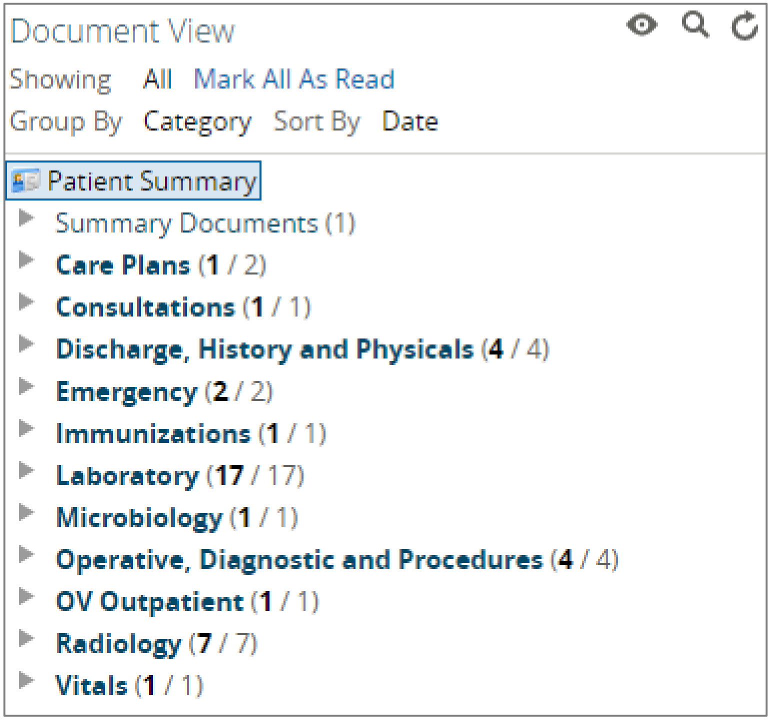
Document View

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
- Operative, Diagnostic, and Procedural Notes

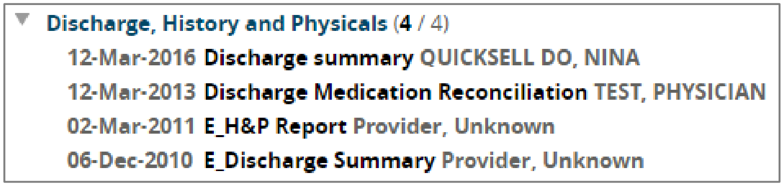
Figure 16. Document View Component



Document View (cont.)

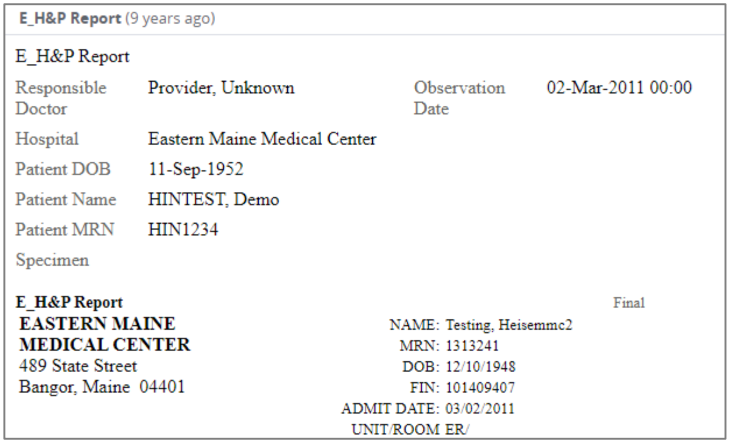
By default, the "Document View" is organized by the type of document (i.e., "Category"). For the document category of interest, users can select the corresponding title from the view to expand a list of all relevant notes/reports/results (Figure 17).

Figure 17. Document Expansion View


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

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

Figure 18. Document Selection View


E_H&P Report (9 years ago)

E_H&P Report

Responsible Doctor	Provider, Unknown	Observation Date	02-Mar-2011 00:00
Hospital	Eastern Maine Medical Center		
Patient DOB	11-Sep-1952		
Patient Name	HINTEST, Demo		
Patient MRN	HIN1234		
Specimen			

E_H&P Report Final
EASTERN MAINE
MEDICAL CENTER
489 State Street
Bangor, Maine 04401

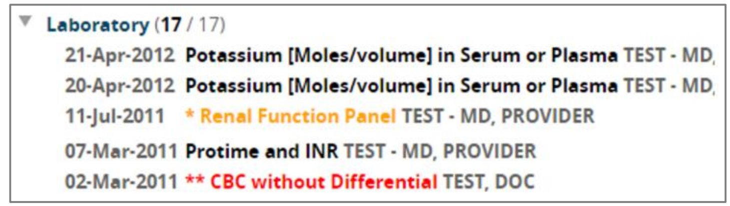
NAME: Testing, Heisemmc2
MRN: 1313241
DOB: 12/10/1948
FIN: 101409407
ADMIT DATE: 03/02/2011
UNIT/ROOM ER/

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

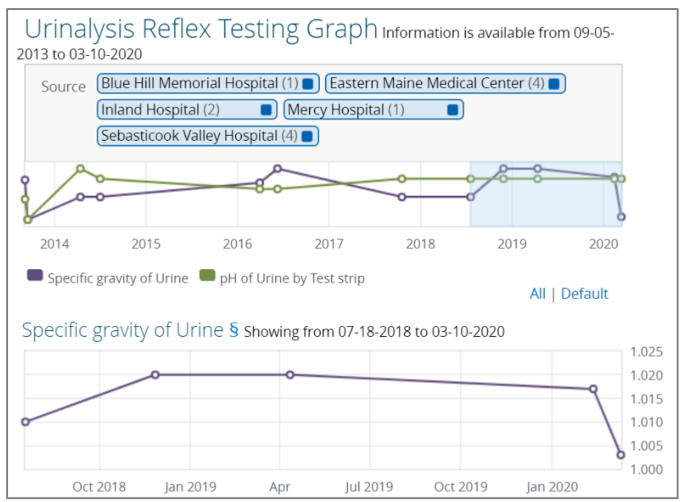
Figure 19. Document Color-Coding Function



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.

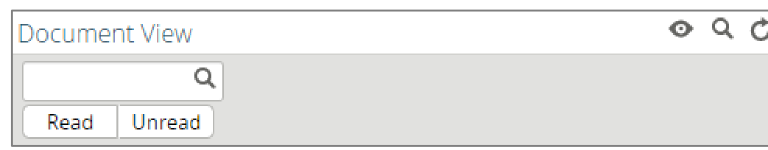
By selecting the eye icon users can configure the display of contents in the "Document View" according to their personal preferences (Figure 21):

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

Figure 22. Document Search Function

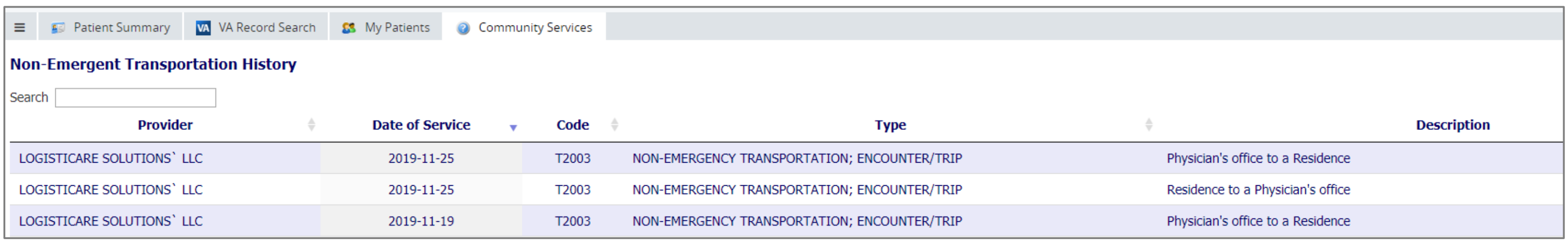


Community Services Information

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


Patient Summary | VA Record Search | My Patients | Community Services

Non-Emergent Transportation History

Search

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:

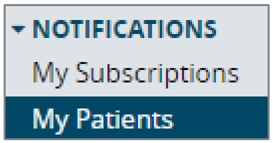
1. Set up their "My Patients" settings – Establish a list of patients to receive notifications on
2. Set up their "My Subscriptions" settings – Establish the types of events to receive notifications on for their defined list of patients

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).

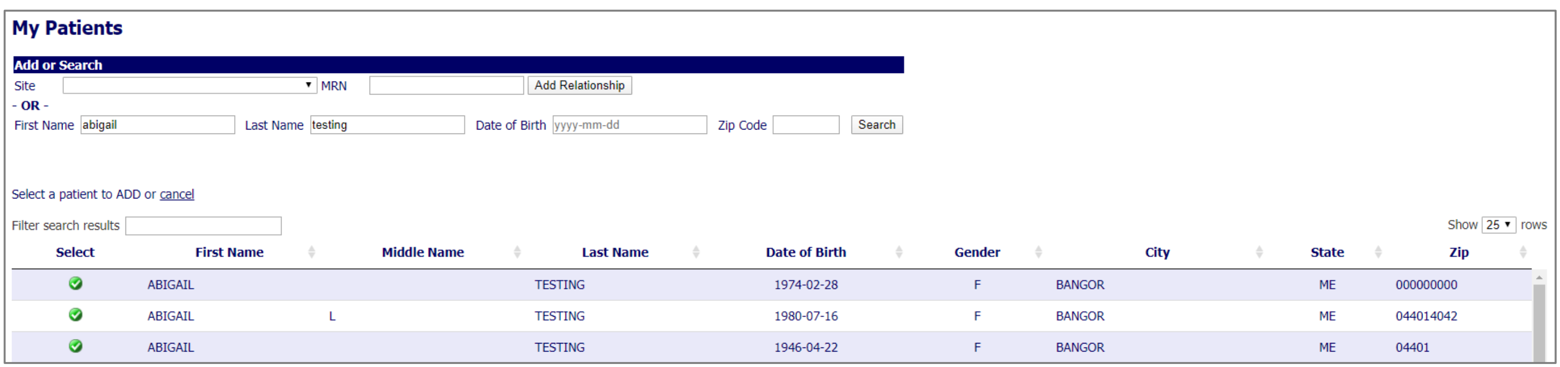
Figure 27. My Patients Option



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).

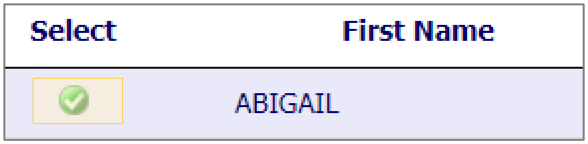
Figure 28. My Patients Search Function



My Patients Configuration (cont.)

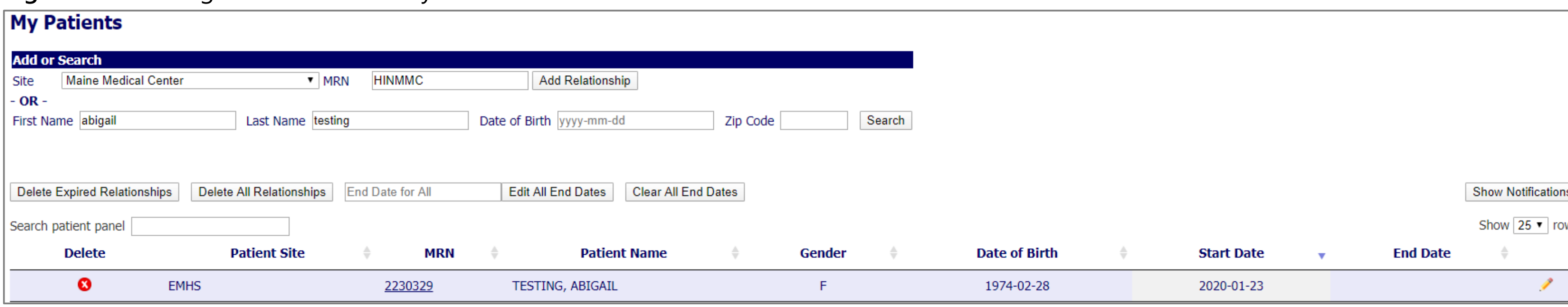
For users to confirm the patient that they would like to add to their "My Patients" list, they can select the green-highlighted checkmark to the left of the patient's name in the table (Figure 29).

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



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).

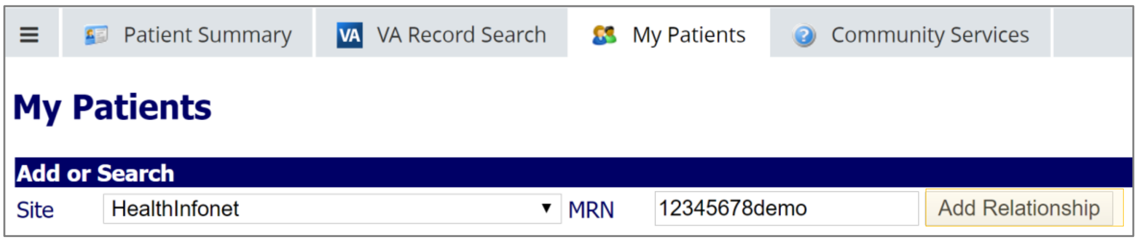
Figure 30. Viewing Patients in the "My Patients" Table



My Patients Configuration (cont.)

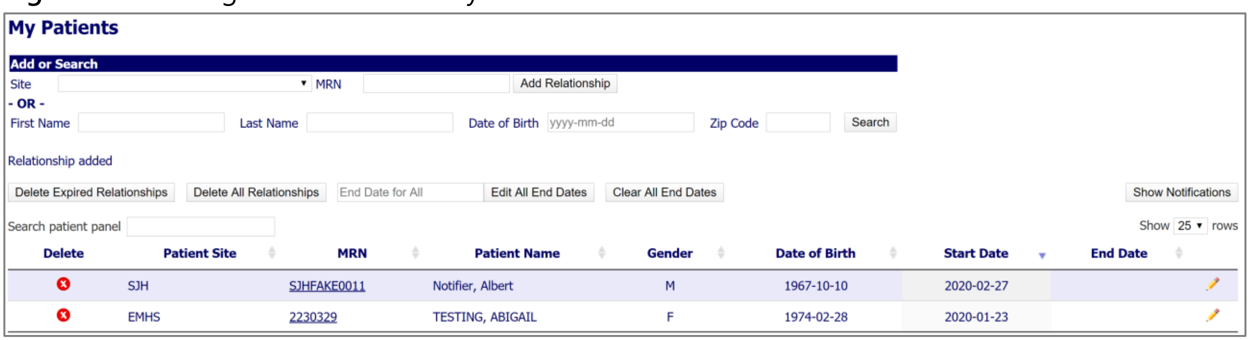
Similarly, users can add a patient to their "My Patients" list from within the selected patient's record. If users select the "My Patients" tab located at the top of the patient's "Patient Summary" view, they will be redirected to the "My Patients" module where the patient's information will be pre-populated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

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



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

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

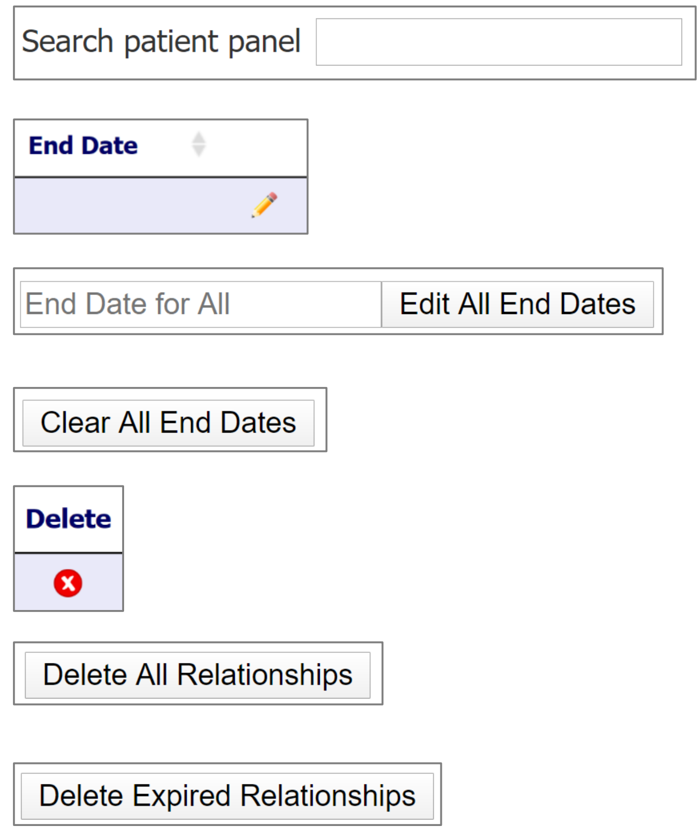


My Patients Functionality

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



My Subscriptions Configuration

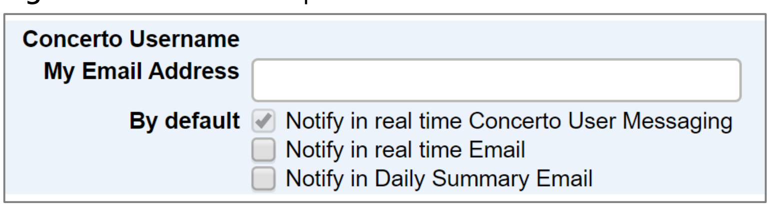
Once users have configured their "My Patients" list by including all patients that they have an interest in tracking and monitoring over time via event-based notifications, users can then configure the actual alert subscriptions that they would like to receive.

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



My Subscriptions Configuration (cont.)

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

Figure 36. Notification Subscription Options

☐	Notification
☐	Inpatient Admission
☐	Inpatient Discharge
☐	Patient is admitted to ER
☐	Patient is discharged from ER
☐	SNF Unit Discharge
☐	A new document (imaging report) is available
☐	Final Radiology Report is available
☐	Final Laboratory Result is available
☐	Final Microbiology Result available
☐	Interim Microbiology Result available
☐	New COVID-19 Laboratory Result Available
☐	Patient Deceased
☐	A new document is available

My Subscriptions Configuration (cont.)

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

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

Figure 37. Notification Subscription Delivery Options

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

Example Notification Email – Real-Time Alert

Figure 38. Real-Time Notification Email Example

Dear HealthInfoNet User,

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

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

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

1. Visit the "My Patients" menu navigation function located on the left-hand side of the screen
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

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

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

Show Notifications

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

Figure 41. All Notifications View

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

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

Figure 42. Events in Summary Notifications View

Events in Summary

Search

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 Account Services

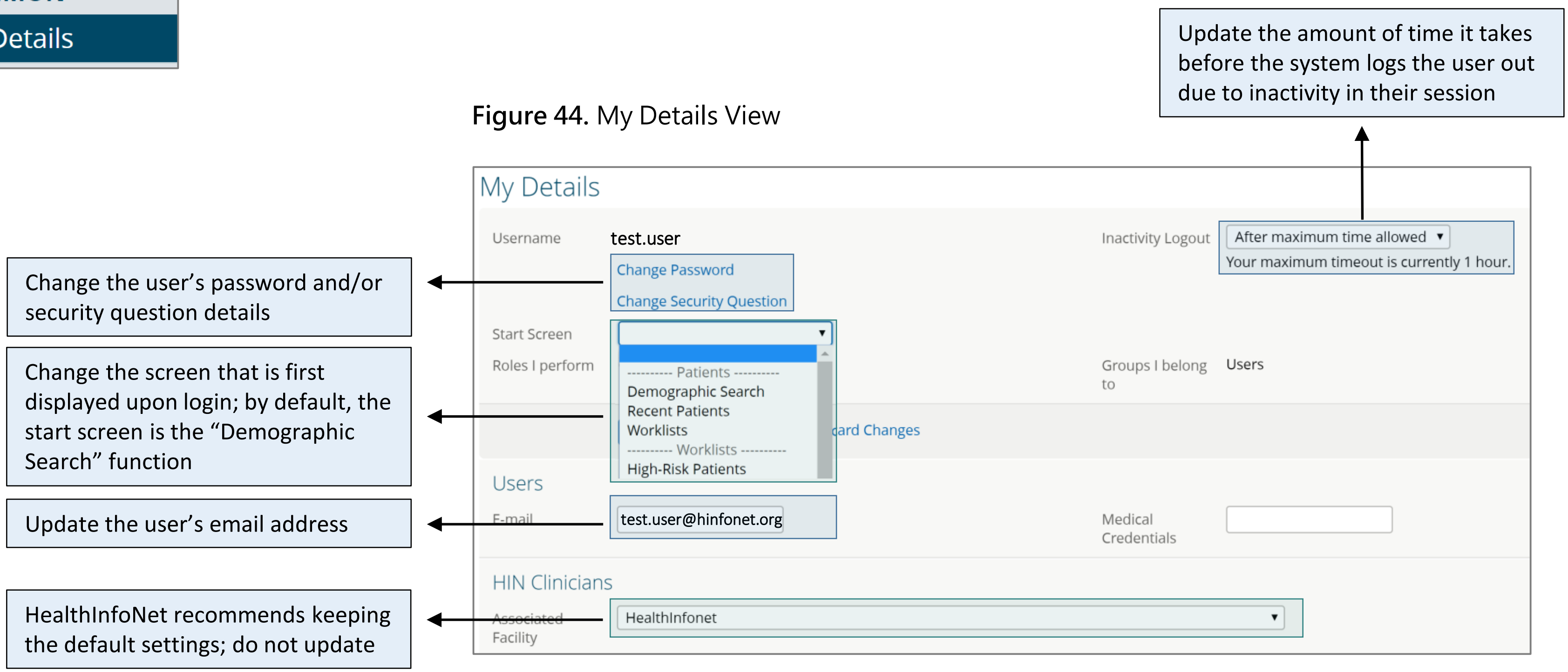
My Details

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).

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

Figure 43. My Details Option

Figure 44. My Details View



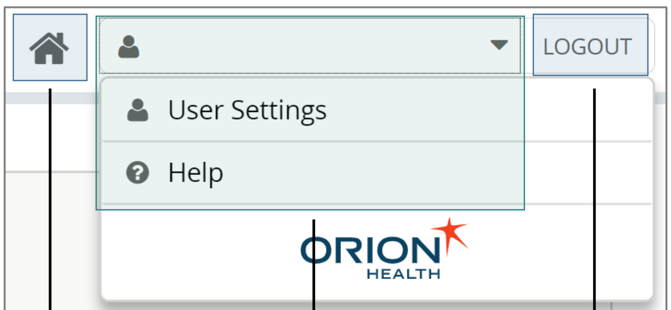
Additional Features & Functionality

Quick Navigation Functionality

In the upper-right hand corner of the Clinical Portal is the system's "Quick Navigation" functionality.

Core components featured in the functionality are outlined below (Figure 45).

Figure 45. User Toggle Drop-Down View



Return to the user's default start screen

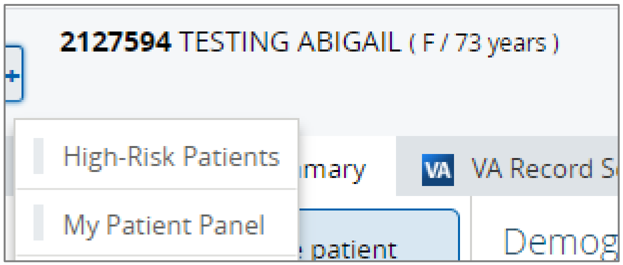
Log out of the Clinical Portal when finished with each session

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

Worklists

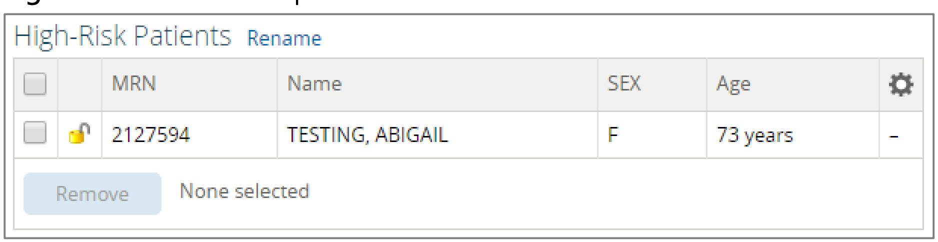
In the upper-left hand corner of the "Patient Summary" view, there is a small (+) icon that users can select to add the selected patient to a worklist of their choosing. When the (+) icon is selected, a drop-down menu will appear to the right with the user's defined worklists (Figure 46).

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



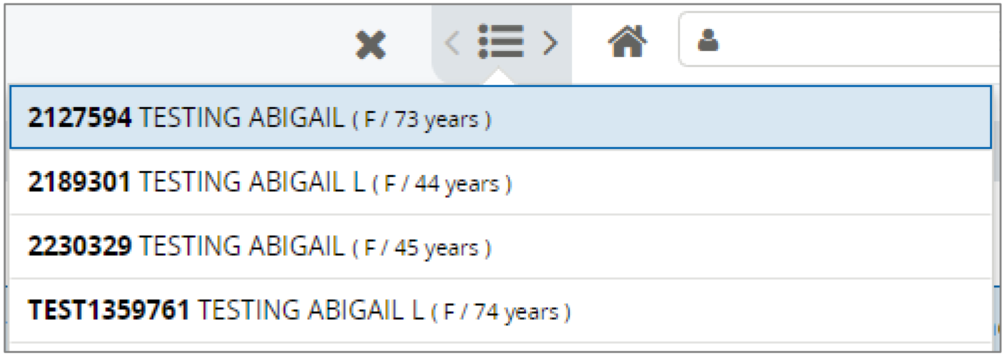
Patient Toggle

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.

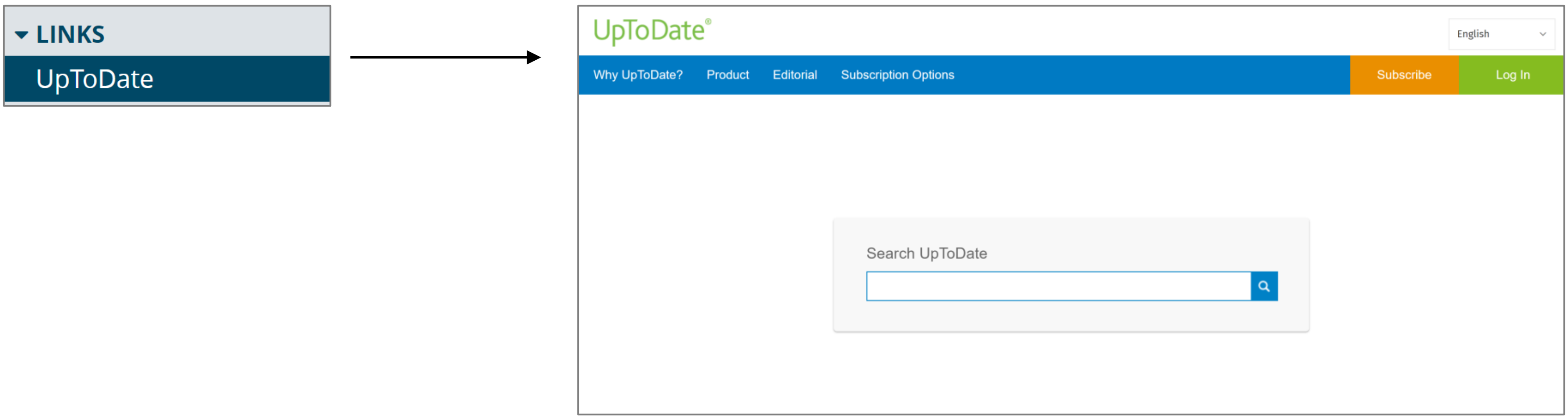
Figure 48. Patient Toggle Drop-Down View



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).

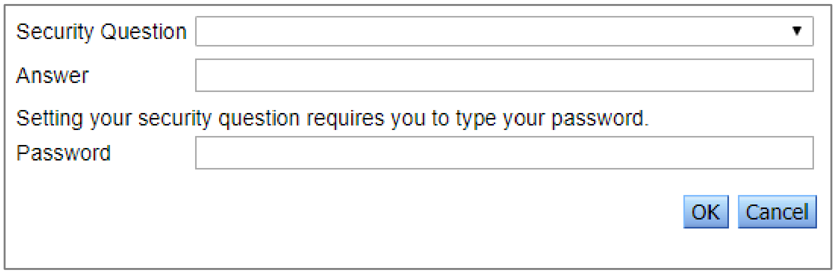
Figure 49. Links Function



Password Reset Process

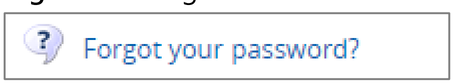
In order for users to be able to reset their passwords, they must proactively set a Security Question for their account. To do so, users can visit the "My Details" option within the "Common" main navigation function and select the "Set My Security Question" link (Figure 50).

Figure 50. Security Question Window



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 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
8.9.15.3	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
8.9.15.4	Made changes to the "Encounter/Visit History" table within the Patient Summary View as a result of HealthInfoNet's partnership with the Office of MaineCare Services (MaineCare) in support of their Medicare Advantage Dual-Eligible Special Needs Plan (D-SNP) data-sharing requirements.	February 1, 2021

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