

# NC HEALTHCONNEX CLINICAL PORTAL

## ATHENA SSO REFERENCE GUIDE



NORTH CAROLINA  
HEALTH INFORMATION EXCHANGE AUTHORITY  
(NC HIEA)

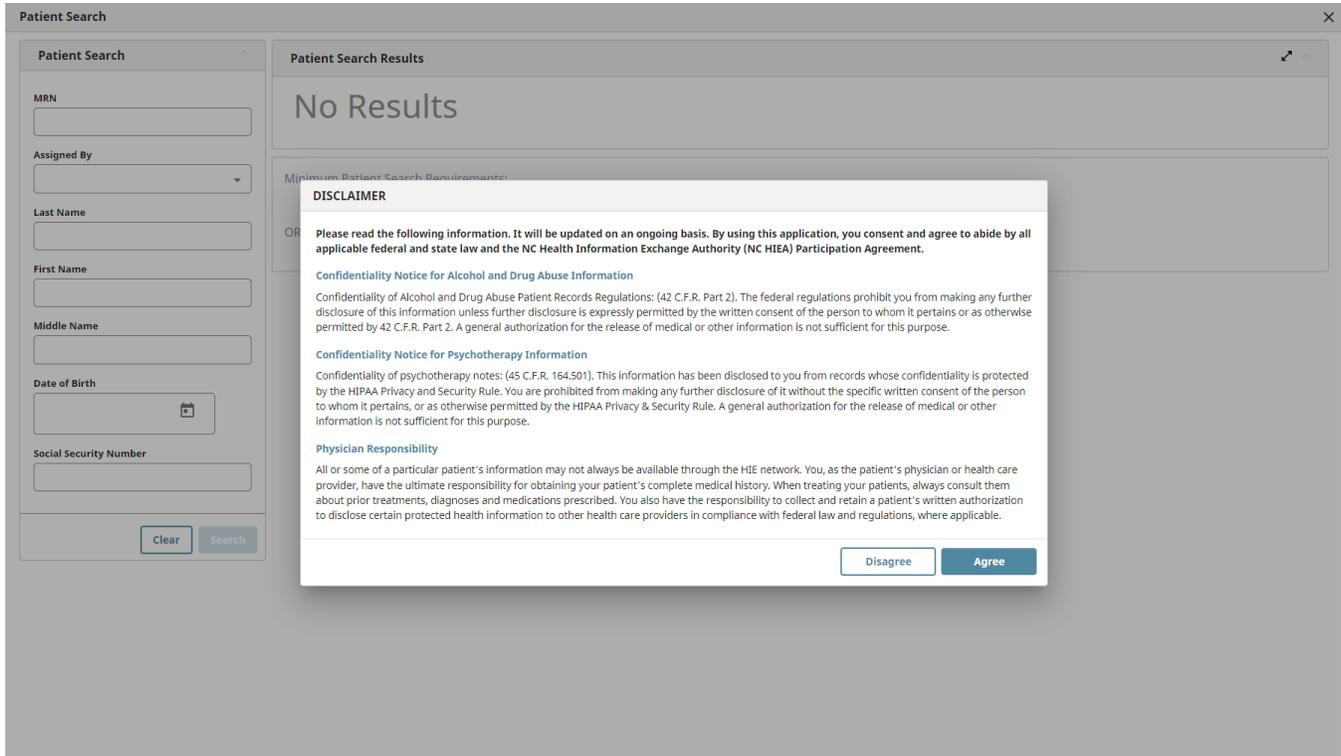
This user guide was developed jointly by the North Carolina Health Information Exchange Authority (NC HIEA) and SAS Institute to assist NC HealthConnex Clinical Portal users in navigating the system. See contact information below for the primary points of contact in your organization as well as the NC HIEA Business Office.

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## I. Single Sign On (SSO) into the Clinical Portal

Once the user has clicked-through from Athena, a search screen with a disclaimer will be displayed as follows:



The screenshot shows a web application window titled "Patient Search". On the left is a search form with fields for MRN, Assigned By, Last Name, First Name, Middle Name, Date of Birth, and Social Security Number. Below these fields are "Clear" and "Search" buttons. On the right is the "Patient Search Results" area, which currently displays "No Results". A modal window titled "DISCLAIMER" is overlaid on the search results area. The disclaimer text reads: "Please read the following information. It will be updated on an ongoing basis. By using this application, you consent and agree to abide by all applicable federal and state law and the NC Health Information Exchange Authority (NC HIEA) Participation Agreement." It includes sections for "Confidentiality Notice for Alcohol and Drug Abuse Information", "Confidentiality Notice for Psychotherapy Information", and "Physician Responsibility". At the bottom of the modal are "Disagree" and "Agree" buttons.

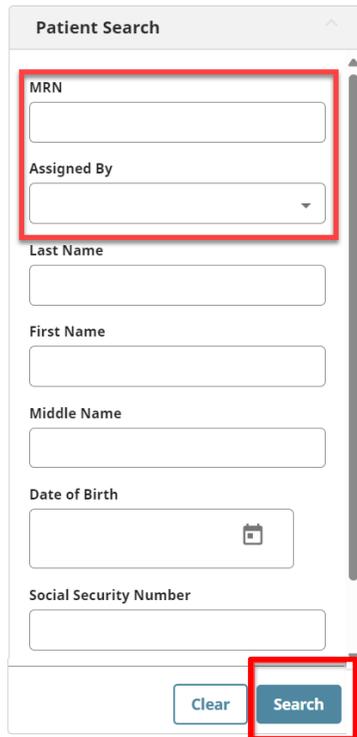
Each time you are directed from Athena to the NC HealthConnex Clinical Portal, you must agree to a standard disclaimer to gain access to the application.

Once the disclaimer has been accepted, you will need to search for the patient again as illustrated in the following sections.

## II. Patient Search

The **Patient Search** screen in the NC HealthConnex Clinical Portal allows you to search for patient records by entering medical record identifiers or demographic information.

### Search by Medical Record Number



**Patient Search**

MRN

Assigned By

Last Name

First Name

Middle Name

Date of Birth

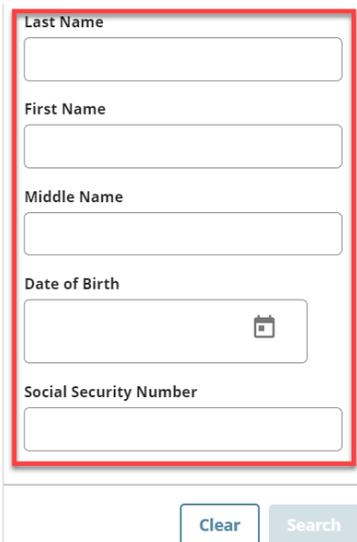
Social Security Number

Clear Search

Every organization assigns medical record numbers (MRNs) to patients. A patient that has received care from multiple organizations may have more than one assigned MRN. You may search for a patient by any MRN, and the assigning facility for that MRN, and see the patient's records from all systems sharing data with NC HealthConnex.

To search by MRN, key in an **EHR ID** and select an **Assigned By** entity name from the drop-down menu by clicking the magnifying glass or typing the practice name, as shown below. Then click **Search**.

### Search by Demographic Information



Last Name

First Name

Middle Name

Date of Birth

Social Security Number

Clear Search

Patients may also be searched by entering at least two fields of demographic information. Search results will appear with the closest match at the top of the list, followed by additional possible matches based on phonetically similar names and other matching criteria.

To search by demographic information, key in both a **Last Name** and either a **First Name** or a **Date of Birth**, then click **Search**.

**\*\*\*Note:** If the search returns too many results, add additional search criteria (such as **Middle Name**) to filter the results and return a refined list of patients. The search algorithm will return results that are a close match; for example, a search may return results for different spellings of the searched name.

## Search Results

Search results will include the following information for any matched patient(s):

- Identifiers:
  - The **Master Patient ID** will be displayed upon initial search under the **Identifiers** column next to the patient's name. This ID is assigned by NC HealthConnex.
  - Clicking the  icon to the left of the **Master Patient ID** will expand the entry and list any **Organization-Specific Patient IDs**, along with attached records, in rows below. Note, these IDs are assigned by the EHRs at the organizations that contributed the specific records.
- Name
- Gender
- Date of Birth
- Address

Search results will appear as shown below.

Patient Search Results				
<span style="color: orange;">!</span> Declare Patient Relationship for records with this warning. <span style="float: right; border: 1px solid #2c5e8c; padding: 2px 5px; color: white; font-weight: bold;">Declare Patient Relationship</span>				
MPI	Name	Gender	DOB	Address
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050 <span style="float: right; color: orange;">!</span>
Items per page: 20    Items 1 – 1 of 1    << < > >>				

Patient Search Results					
<span style="color: orange;">!</span> Declare Patient Relationship for records with this warning. <span style="float: right; border: 1px solid #2c5e8c; padding: 2px 5px; color: white; font-weight: bold;">Declare Patient Relationship</span>					
MPI	Name	Gender	DOB	Address	
<span style="border: 2px solid red; padding: 2px;">&gt;</span> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050 <span style="float: right; color: orange;">!</span>	
MPI	Identifier(s)	Name	Gender	DOB	Address
100000021	DUHS ADULTDEMO	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050 
Items per page: 20    Items 1 – 1 of 1    << < > >>					

From the search result, you must click on “**Declare Patient Relationship**” to progress any further.

Patient Search Results					<span style="color: orange;">!</span> Declare Patient Relationship for records with this warning <span style="float: right; border: 2px solid red; padding: 2px;">  <b>Declare Patient Relationship</b> </span>
MPI	Name	Gender	DOB	Address	
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050	<span style="color: orange;">!</span>

Items per page: 20    Items 1 - 1 of 1    << < > >>

*\*\*\*Note: If there is any restriction on the information stored for the patient selected, a pop-up window explaining that the information is restricted will display (for example, if the patient has opted out of having their information shared via NC HealthConnex, or if your access level does not permit viewing of clinical data.)*

## Patient Privacy and Opt Out

The standard patient consent model implemented in NC HealthConnex, as stated in the North Carolina Health Information Exchange Act, is “Opt Out.” This means that patient data is by default opted in to being shared via NC HealthConnex unless a patient explicitly requests to opt out of having their information shared.

If a patient searched has opted out of having their information shared via NC HealthConnex, you may only see a **Master Patient ID** (no **Organization-Specific Patient IDs**). Clicking on the **Patient Name** will result in a message barring access to the patient record, as shown below.

Patient Search Results						<span style="color: orange;">!</span> There may still be restricted data that you are not permitted to view. <span style="float: right; border: 1px solid gray; padding: 2px;">  <b>Override Applied</b> </span>
MRN	MPI	Name	Gender	Date of Birth	Address	
> 102406113		Test, Patient	M	01/15/1920	6774 102nd Ave., Pinellas Park FL 33782	<span style="color: orange;">!</span>

When the user searches for the patient, break the seal. The patient will not be enabled to be click on it to view and will see a message “ There may still be restricted data that you are not permitted to view.”

### III. APPENDIX A – SINGLE SIGN-ON ERRORS AND REMEDIATION STEPS

Please contact the SAS NC HealthConnex Help Desk at [hiesupport@sas.com](mailto:hiesupport@sas.com) for next steps in resolving the following errors while using Single Sign-On:

Error Code	Description
5770	Object open failed because 'APIKey' key value of 'xyz' was not found
6390	Signature validation failed: Signature verification failed: unable to get local issuer certificate
5001	Practice ### for EHR is not configured for SSO.
6390	Signature validation failed: Digest did not match
6390	Signature validation failed: Failed NotBefore\NotOnorAfter
5001	Username for domain is not provided in SAML
5001	User FullName for domain is not provided in SAML
5001	User FirstName for domain is not provided in SAML
5001	User LastName for domain is not provided in SAML
5001	Practiceid for domain is not provided in SAML
5001	Patient Name missing.
5001	Patient DOB missing
5001	Invalid request