



NORTH CAROLINA HEALTH INFORMATION EXCHANGE AUTHORITY

NC HealthConnex Clinical Portal: Quick Reference Guide



Clinical Portal Quick Reference Guide – Logging In

Go to hiea.nc.gov or nchealthconnex.gov

Click on “Clinical Portal Login” at the top of the page.



Getting Started With NC HealthConnex

Clinical Portal Quick Reference Guide – Logging In

You will see [the login screen](#) for the NC HealthConnex Clinical Portal.

Enter your username and password.
Note that the Domain field should show “%HS_Default.”

*****Note:** You will not be prompted to create a challenge question and answer upon your first login. Please take the time to create one in the [Profile tab](#) found in the user menu in the upper right corner.

 **NC HealthConnex**
Powering Health Care Outcomes

SYSTEM MAINTENANCE THIS WEEKEND: From Saturday April 20 2024 at 7:00 a.m. ET. to Sunday April 21 2024 at 5:00 p.m. ET.

Log In

Domain
%HS_Default

Username
[Redacted]

Password
[Redacted] 

[Forgot Password?](#)

Log In

Help Desk/System Admin contact information:
Support Line: 919-531-2700
hiesupport@sas.com
[Provider Help](#)

Announcements

USER EXPRESSLY CONSENTS TO MONITORING

This system is provided by the State of North Carolina and is for authorized users ONLY. Unauthorized access may result in disciplinary action, civil and criminal penalties. Users have no expectation of privacy.

PAA (Participant Account Administrator)

You must attest to facility user activity for the Q1-2024 quarter. Login with your PAA account and review user activity on your PAA home page. When ready, click the "Attest to Audit" button to complete the audit.

Important Information

Please contact the Help Desk if you are having trouble logging in. Note that 5 invalid attempts will result in a disabled account and the Forgot Password function will not work. See Log In Section in the User Guide for more details.

Clinical Portal Quick Reference Guide – Logging In

Upon successful login, you will see the disclaimer that we do not accept 42 CFR Part two data or psychotherapy notes into NC HealthConnex.

Click “Agree” to proceed.

DISCLAIMER

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.

Confidentiality Notice for Alcohol and Drug Abuse Information

Confidentiality of Alcohol and Drug Abuse Patient Records Regulations: (42 C.F.R. Part 2). The federal regulations prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 C.F.R. Part 2. A general authorization for the release of medical or other information is not sufficient for this purpose.

Confidentiality Notice for Psychotherapy Information

Confidentiality of psychotherapy notes: (45 C.F.R. 164.501). This information has been disclosed to you from records whose confidentiality is protected by the HIPAA Privacy and Security Rule. You are prohibited from making any further disclosure of it without the specific written consent of the person to whom it pertains, or as otherwise permitted by the HIPAA Privacy & Security Rule. A general authorization for the release of medical or other information is not sufficient for this purpose.

Physician Responsibility

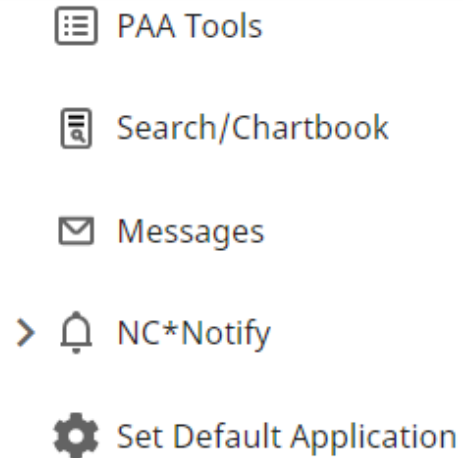
All or some of a particular patient's information may not always be available through the HIE network. You, as the patient's physician or health care provider, have the ultimate responsibility for obtaining your patient's complete medical history. When treating your patients, always consult them about prior treatments, diagnoses and medications prescribed. You also have the responsibility to collect and retain a patient's written authorization to disclose certain protected health information to other health care providers in compliance with federal law and regulations, where applicable.

Disagree

Agree

Clinical Portal Quick Reference Guide – User Interface

Left Global Menu - Displays at the top left of the screen upon logging in to the Clinical Portal and on certain screens.



This menu displays links to various screens depending on your role:

- **PAA Tools:** This view is only available to those with a PAA role. If you **only** have a PAA role, this is the only menu item you will see.

If you have the PAA role and the Clinical role, you will see additional options:

- **Search/Chartbook:** This link takes you to the Patient Search screen.
- **Messages:** This link takes you to your inbox **if enrolled** in Direct Secure Message (DSM) Webmail through the NC HIEA.
- **NC*Notify: If enrolled,** this link will allow you to access a dashboard-like view of patient activity through event notifications.
- **CSRS (Controlled Substance Reporting System) Report:** This link allows you to access CSRS Reports within the clinical viewer. You must be a prescribing provider and **enrolled** in this service to see this option.

Clinical Portal Quick Reference Guide – Patient Search

Below is the patient search screen. You can search by MRN or patient demographics.

MRN

Assigned By

Last Name

First Name

Middle Name

Date of Birth

Social Security Number

Patient Search Results

No Results

Minimum Patient Search Requirements:

- Enter both an MRN Identifier and select an Assigned By (Assigning Authority / Facility Name) value

OR

- Enter Last Name and either First Name, DOB, or SSN (Last Name and First Name must be a minimum of two characters)

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 **NC HealthConnex**
Powering Health Care Outcomes

Clinical Portal Quick Reference Guide – Patient Search

Patient Search

MRN

Assigned By

Last Name

demo

First Name

adult

Middle Name

Date of Birth

Social Security Number

Clear

Search

Patient Search Results

ⓘ Declare Patient Relationship for records with this warning.

ⓘ Declare Patient Relationship

MPI	Name	Gender	DOB	Address
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050

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

Once you search for a patient, you will see this screen. You must click “Declare Patient Relationship” to indicate the reason you are viewing that patient’s record.

Clinical Portal Quick Reference Guide – Declare Relationship

Patient Search

MRN

Assigned By

Last Name

demo

Patient Search Results

! Declare Patient Relationship for records with this warning.

Declare Patient Relationship

MPI	Name	Gender	DOB	Address
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050

Items per page: 20 Items 1 – 1 of 1 |< < > >|

*****Note:** If you do not declare a relationship, you cannot open the record.

own menu.

A vertical screenshot of a mobile application interface. The top section is a dark blue header bar with the text "tationship" in white. Below the header is a light gray area containing a small orange circle with a white exclamation mark. The rest of the screen is a solid dark gray.



NC HealthConnex
Powering Health Care Outcomes

Clinical Portal Quick Reference Guide – Patient Search

Patient Search

MRN

Assigned By

Last Name

demo

First Name

adult

Middle Name

Date of Birth

Social Security Number

Clear

Search

Patient Search Results

There may still be restricted data that you are not permitted to view.

Override Applied

MPI	Name	Gender	DOB	Address
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050

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

Once you have declared the relationship, the MPI (Master Patient Index number) will turn blue, indicating it is a clickable link to open the patient's chartbook.

In some cases, the carat to the left of the MPI field can be clicked to expand and see multiple MRNs (Medical Resource Numbers) for a patient.

Clinical Portal Quick Reference Guide – Chartbook

Now you can see the patient's information. The landing screen is the summary which shows the most recent documents.

The screenshot displays the NC HealthConnex Clinical Portal interface. At the top, the patient's name is "DEMO, ADULT" with demographic information: F, 49y, 07/07/1975, MPI: 100000021. A "Patient Selection" dropdown and a user profile icon are visible in the top right. A warning message states: "There may still be restricted data that you are not permitted to view. Override Applied".

The left sidebar contains a "Chartbook" menu with options: Clinical Summary (selected), Conditions, Allergies, Medications, Documents, Immunizations, Vital Signs, Lab Results, Diagnostic Studies, Procedures, Histories, Encounters, and Appointments.

The main content area is divided into four sections:

- Allergies** (Sorted by Last Updated, Status): A table with 5 rows showing various allergies and reactions.
- Medications** (Sorted by Start Date): A table with 5 rows showing active and inactive medications.
- Documents** (Sorted by Activity Date, Activity Time): A table with 1 row showing a "Continuity of Care Document".
- Lab Results** (Sorted by Result Date): A table with 2 rows showing "Comprehensive Metabolic Panel (CMP)" and "Complete Blood Count (CBC)".

Navigation links include "Back to: Patient Search" and "Next >" for the medications and lab results sections.

Details	Category	Allergen	Reaction
⋮	Propensity to adverse reactions to drug	Ragweed	Other (See Comments)
⋮	Propensity to adverse reactions to drug	House Dust	Other (See Comments)
⋮	Propensity to adverse reactions to drug	Aspirin	Nausea
⋮	Propensity to adverse reactions to drug	Cyclobenzaprine	Itching
⋮	Propensity to adverse reactions to drug	Latex	Rash

Details	Medication	Status	Start Date
⋮	acetaminophen (TYLENOL) 500 MG tablet	In Progress	05/04/2020
⋮	albuterol (ACCUNEb) 0.63 mg/3 mL nebulizer solution	In Progress	05/04/2020
⋮	cetirizine (ZYRTEC) 10 mg capsule	Inactive	05/04/2020
⋮	cinacalcet (SENSIPAR) 60 MG tablet	Inactive	05/04/2020
⋮	clopidogrel (PLAVIX) 75 mg tablet	In Progress	05/04/2020

Details	Doc Type	Document	Document Parsed
⋮	Consolidated CDA R2.1 Structured Body Document	Continuity of Care Document	Yes

Details	Order	Results	Result Date
⋮	Comprehensive Metabolic Panel (CMP)	Results	04/23/2020 06:42
⋮	Complete Blood Count (CBC)	Results	04/23/2020 06:09

There may still be restricted data that you are not permitted to view.

There may still be restricted data that you are not permitted to view.

 Override Applied

DEMO, ADULT

Clinical Portal Quick Reference Guide – Chartbook

Search results will appear with a yellow highlight.

DEMO, ADULT

F 49y 07/07/1975 MPI: 100000021

Search Chartbook

Messages

Back to: Chart >

Chartbook

Clinical Summary

Conditions

Allergies

Medications

Documents

Immunizations

Vital Signs

Lab Results

Diagnostic Studies

Procedures

Histories

Encounters

There may still be restricted data that you are not permitted to view.

Override Applied

Medications

Current Medications

vancomycin

Details	Medication	Dose	Frequency	Status	Source	Start Date
---------	------------	------	-----------	--------	--------	------------

Historical Medications

vancomycin

Sorted by Start Date

Details	Medication	Dose	Frequency	Status	Source	Start Date
	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		04/23/2020 00:00
	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive	Sample Provider	04/22/2020 06:00
	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		04/21/2020 06:00
	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 2.5 g/500 mL	2.5 g		Inactive	Sample Provider	04/20/2020 16:46
	Vancomycin to be dosed by nephrology			Inactive		04/20/2020 14:40
	vancomycin pharmacy consult			Inactive		04/20/2020 13:21
	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		11/16/2019 06:00
	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 1.5 g/250 mL	1.5 g		Inactive		11/15/2019 15:43
	Vancomycin - Nephrology to dose in HD patient.			Inactive	Sample Provider	11/15/2019 12:05

Clinical Portal – How to find PCP for messaging

DEMO, ADULT
F 50y 07/07/1975 MPI: 100000021

[Back to: Chart](#) >

Chartbook <<

- Clinical Summary
- Conditions
- Allergies
- Medications
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories
- Encounters
- Appointments
- Cohorts
- Demographics**
- Insurance
- CSRS Report

Demographics

Demographics

Patient Details

Title	
Surname	DEMO
Given Name	ADULT
Middle Name	
Suffix	
Gender	F
Date of Birth	07/07/1975
Age	50
SSN	
Driving License	
Preferred Language	
Translator Required	

Address Details

Address	7777 MAKE BELIEVE STREET
City	NOTAREAL TOWN
State	NC
Post Code	20050
Country	USA
Home Telephone	(919) 5707334
Business Phone	
Mobile Phone	(919) 5707334
Email	

[Other Address](#)

Local Doctor Details	
GP Name	

Clinical Details

Blood Type	
------------	--

[Allergen EMR](#)

Additional Demographics

Race	2106-3
Marital Status	S
Religion	

Information about Death

Date of Death	
Time of Death	
Location of Death	
Declared Deceased By	

[MRN](#)

Contacts

Surname	Given Name	Relationship	Type	Mobile Phone	Home Phone	Email	Address	Entered On
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 **NC HealthConnex**
Powering Health Care Outcomes

Clinical Portal – How to find PCP for messaging

DEMO, ADULT
F 50y 07/07/1975 MPI: 100000021

[Back to: Chart](#) >

Chartbook <<

- Clinical Summary
- Conditions
- Allergies
- Medications
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Encounters**
- Appointments
- Cohorts
- Demographics
- Insurance
- CSRS Report

Encounters

▼ Encounters

Start Date	Type	Organization	Facility	Department	Treating Care Provider	Encounter
02/07/2025 09:13	Outpatient	University of NC HCS	Wayne Memorial Hospital	UNC PRIMARY CARE AT GOLDSBORO	EMILY WOOD LONG	380121520
02/06/2025 15:49	Inpatient	Duke University Health System	Duke Regional Hospital	DRH BEHAVIORAL HEALTH INPATIENT UNIT	LESLIE LARISSA BRONNER	374531609
01/06/2025 09:50	Outpatient	Duke University Health System	Duke Raleigh Hospital	SOUTHEASTERN ORTHOPEDICS	KEVIN PAUL SPEER	371684029
01/05/2025 08:00	Outpatient	University of NC HCS	Watauga Medical Center	PERIOP ARWH	PAUL SAMI DAGHER	379374047
05/04/2020 10:37	Outpatient	Duke University Health System	Duke University Health System			192468220
04/27/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468220
04/24/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468220
04/20/2020 11:41	Inpatient	Duke University Health System	Duke University Health System			192468220
04/20/2020 10:54	Outpatient	Duke University Health System	Duke University Health System			192468219
04/15/2020 09:33	Outpatient	Duke University Health System	Duke University Health System			192468219
04/13/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468219
03/09/2020 12:07	Outpatient	Duke University Health System	Duke University Health System			192468210
02/24/2020 11:23	Inpatient	Duke University Health System	Duke University Health System			192468210
02/20/2020 11:00	Outpatient	Duke University Health System	Duke University Health System			192468210
02/20/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468210
02/14/2020 12:50	Outpatient	Duke University Health System	Duke University Health System			192468219
02/12/2020 11:08	Outpatient	Duke University Health System	Duke University Health System			192468219
02/12/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468219

Clinical Portal – How to find PCP for messaging

DEMO, ADULT
F 50y 07/07/1975 MPI: 100000021

[Back to: Chart](#) >

Chartbook <<

- Clinical Summary
- Conditions
- Allergies
- Medications
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories
- Encounters
- Appointments**
- Concorts
- Demographics
- Insurance
- CSRS Report

Appointments

▼ **Current Appointments**

Type	Provider	Facility	Status	Appointment
------	----------	----------	--------	-------------

▼ **Historical Appointments**

Type ▼ Provider ▼ Facility ▼ Attendan

▼ Ancillary Procedure

Ancillary Procedure	Sample Provider Sample Provider (366258_t20)	Some Hospital Triangle Heart Associates		
---------------------	--	---	--	--

▼ Appointment

Appointment		Some Hospital Regional Hospital Interventional Radiology		
Appointment		Some Hospital Regional Hospital Interventional Radiology		

▼ Hospital Encounter

Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop		
Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop		
Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop		
Hospital Encounter		Some Hospital Regional Hospital Interventional Radiology		

▼ Initial consult

Initial consult	Sample Provider Sample Provider (366258_t20)	Some Hospital Triangle Heart Associates		
-----------------	--	---	--	--

▼ Office Visit

Office Visit	Sample Provider Sample Provider	Vascular Access		
Office Visit	Sample Provider Sample Provider (1022623_t20)	Vascular Access		
Office Visit	Sample Provider Sample Provider	Vascular Access		

Clinical Portal – DSM (Used to message PCPs)

Left Global Menu - Displays at the top left of the screen upon logging in to the Clinical Portal and on certain screens.



 PAA Tools

 Search/Chartbook

 Messages

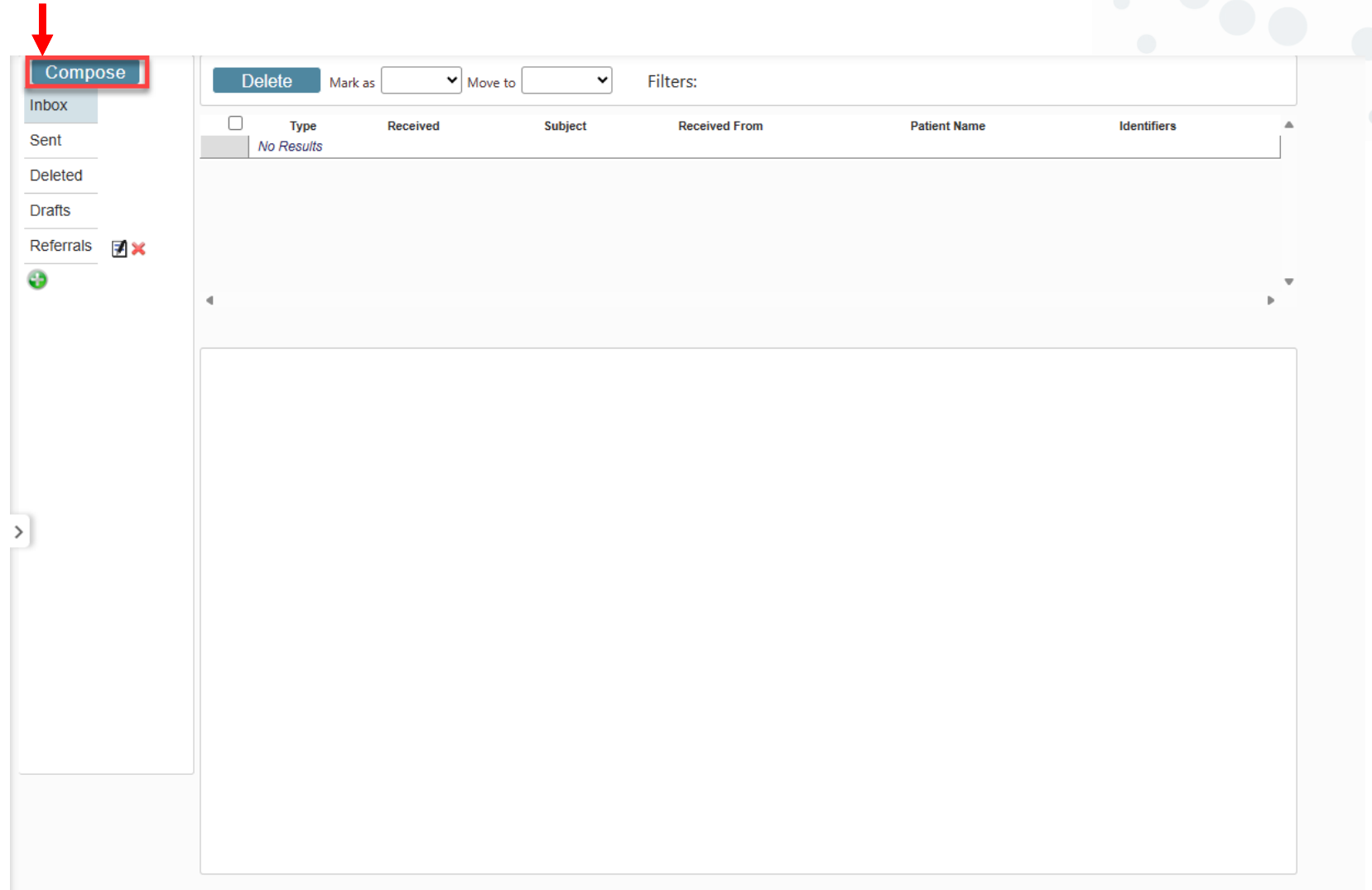
>  NC*Notify

 Set Default Application

- **Messages:** This link takes you to your inbox **if enrolled** in Direct Secure Message (DSM) Webmail through the NC HIEA.
- Click on the button to bring up the DSM inbox.

DSM – Sending a message

To send a message , click “Compose”.



DSM – Send a message.

You will then be able to search for providers by last and first name or NPI. Then click “Search User/Clinician”.

The screenshot displays a web application interface for sending a message. On the left, there is a sidebar with search filters. The top section, highlighted with a red box, contains input fields for 'Last Name', 'First Name', and 'NPI Number', followed by a 'Search User/Clinicians' button. Below this, there are sections for 'Clinician Group' and 'Receiving System', each with a 'Search' button. At the bottom of the sidebar are 'Clear' and 'Close' buttons. The main content area on the right shows a table of search results. Above the table, it indicates 'Page size: 25', 'Results: 0', and 'Page: 1 of 1'. The table header is 'Recipients Found (click on a name to select):' and lists columns: 'Name', 'DSM Address', 'Description', and 'NPI Number'. The table body is currently empty.

Recipients Found (click on a name to select):			
Name	DSM Address	Description	NPI Number

DSM

Click on the user you want to send a message to.

Last Name

First Name

NPI Number

Search User/Clinicians

Clinician Group

Search

Receiving System

Search

Clear

Close

Page size: 25 Results: 2 Page: < < 1 > > of 1

Recipients Found (click on a name to select):

Name	DSM Address	Description	NPI Number

DSM

You can now put in a subject or add an attachment (like a care plan) to send to the provider along with your message in “Note”.

Compose Message - Work - Microsoft Edge

[https://demo.nchealthconnex.net/hsdemoag1/csp/healthshare/hsaccess/NCHIE.HS.UI.Push.SendMessage.cls?\\$ZEN_POPUP=1&errstatus=1&CP SHARE=1&mode=C](https://demo.nchealthconnex.net/hsdemoag1/csp/healthshare/hsaccess/NCHIE.HS.UI.Push.SendMessage.cls?$ZEN_POPUP=1&errstatus=1&CP SHARE=1&mode=C)

To: [Send to PCP](#)

Cc: [CC to PCP](#)

☐ Delivery Policy:

Subject:

Note:

Attachments: Add attachments like notes, or care plans, Here.

When you're done, click "Send"

To:

smith.jane@hospital.dsm

[Send to PCP](#)

Cc:

[CC to PCP](#)

Patient:

Junior Doe

Delivery Policy:

Message Type:

Referral

Reason:

Subject:

Care Plan

Note:

Hi Dr. Smith,

Good afternoon. Please see Junior's attached care plan and let me know if you have any questions.

Kind regards,

Regina Lewis
Care Manager

Attachments:

Junior_Doe_Care_Plan.docx

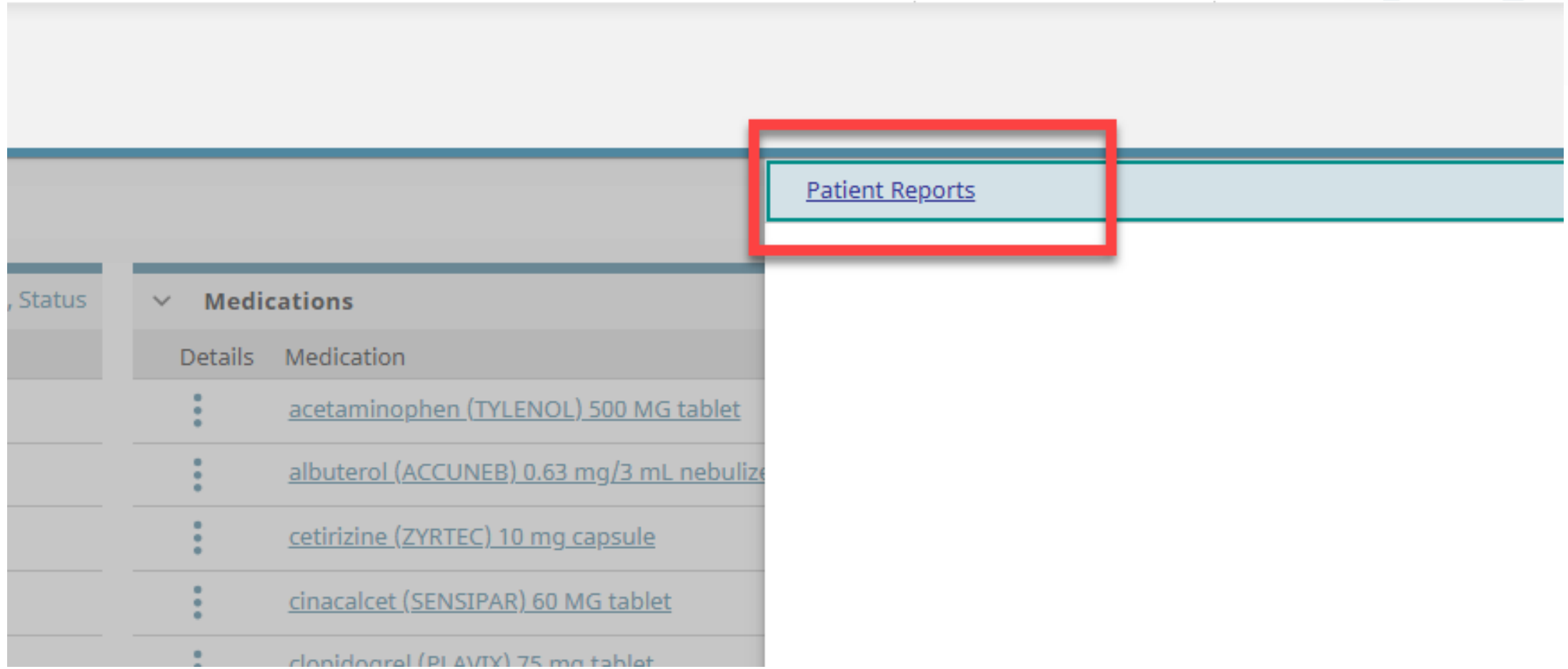
Send

Save Draft

Cancel

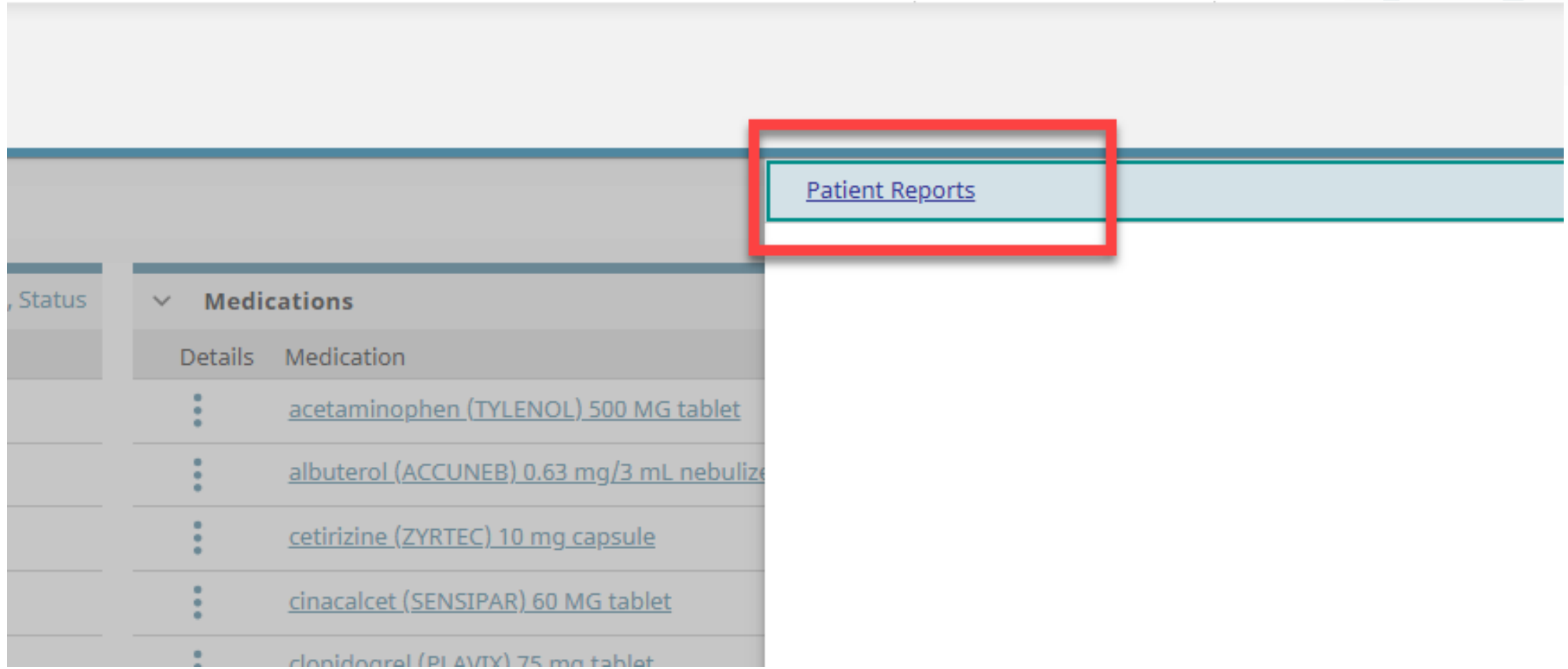
DSM – Medication Reconciliation

Second, click on “Patient Reports”.



DSM – Medication Reconciliation (Using DSM for medication reconciliation)

Second, click on “Patient Reports”.



DSM – Medication Reconciliation

Make sure “View as” is set to “PDF”, and “Report” is set to “Patient Summary Report Expanded”.

DEMO, ADULT

F 50y 07/07/1975 MPI: 100000021

[Back to: Chart](#) >

[Download Summary](#)

View As:

Patient Summary (HTML)

Report: Patient Su

Patient Summary Report

Consolidated CDA CCD

Consolidated CDA v2.1 CCD

Patient Summary (HTML)

Patient Summary (PDF)

Patient Demographics

Name	Date Of Birth	Gender
ADULT DEMO	1975-07-07	F

>

Allergies

Onset Date	Inactive Date	Allergen	Category
2016-12-13		Ragweed	Propensity to adverse reactions

>

Report

Patient Summary Report (Expanded)

Send...

Patient Summary Report

Patient Summary Report (Claims)

Patient Summary Report (Expanded)

Patient Summary Report (Pharmacy)

Gender	Identification Number
F	MRN: 100087169058 MRN: D3805331 MRN: ADULTDEMO

DSM – Medication Reconciliation

Scroll to medications or use the search feature.

Patient Summary (PDF) Report: Patient Summary Report (Expanded) Send...

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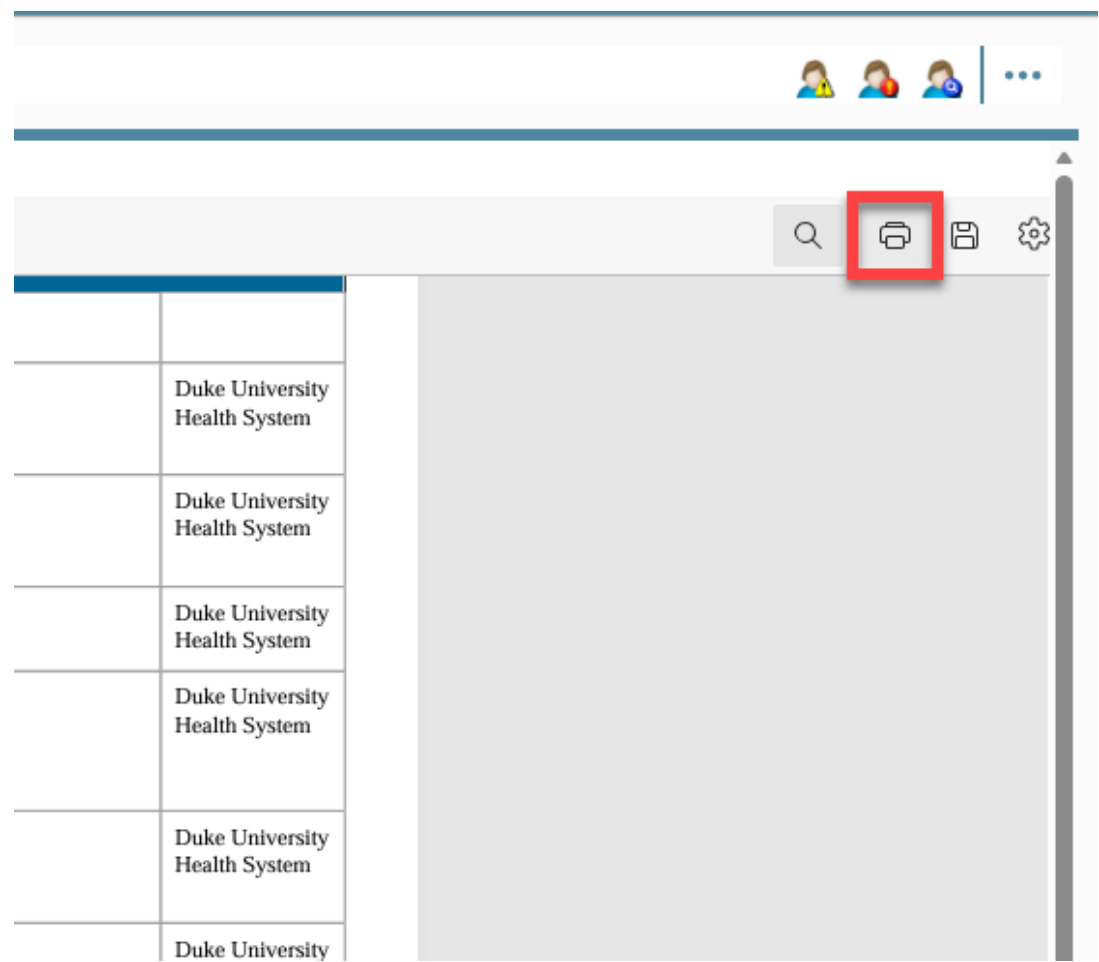
Search

Patient Summary Report for ADULT DEMO

Medication	Date	Status	Form	Strength	Duration	Qty	Indications	Instruction	Refills	Source
acetaminophen (TYLENOL) 500 MG tablet	2020-05-04	In-Progress		500 mg				Take 500 mg by mouth every 6 (six) hours as needed.	0	Duke University Health System
cinacalcet (SENIPAR) 60 MG tablet	2020-05-04	Executed		60 mg				Take 60 mg by mouth once daily.	0	Duke University Health System
docusate (COLACE) 100 MG capsule	2020-05-04	Executed		100 mg				Take 100 mg by mouth as needed.	0	Duke University Health System
levothyroxine (Synthroid) 100 mcg tablet	2020-05-04	Executed		100 ug				Take 100 mcg by mouth once daily.	0	Duke University Health System

DSM – Medication Reconciliation

You can print(or print to PDF for med reconciliation) the pages you need or download the entire patient summary.



DSM – Medication Reconciliation

Select the pages you need for the medications and print or print to PDF.

Print ?
Total: 37 sheets of paper

Printer

Microsoft Print to PDF ▼

Copies

1

Layout

☐ Portrait

☒ Landscape

Pages

☐ All

☐ Odd pages only

☐ Even pages only

☒ 14-50

Color

Color ▼

[More settings](#) ▼

[Print using system dialog... \(Ctrl+Shift+P\)](#)

Print

Cancel

Patient Summary Report for ADULT DEMO

Medication	Date	Status	Form	Strength	Duration	Qty	Indications	Instruction	Refills	Source
acetaminophen (TYLENOL) 500 MG tablet	2020-05-04	In-Progress		500 mg				Take 500 mg by mouth every 6 (six) hours as needed.	0	Duke University Health System
cinacalcet (SENIPAR) 60 MG tablet	2020-05-04	Executed		60 mg				Take 60 mg by mouth once daily.	0	Duke University Health System
docusate (COLACE) 100 MG capsule	2020-05-04	Executed		100 mg				Take 100 mg by mouth as needed.	0	Duke University Health System
levothyroxine (LEVOTYROL) 100 MCG tablet	2020-05-04	Executed		100 ug				Take 100 mcg by mouth once daily.	0	Duke University Health System
sevelamer carbonate (RENVELA) 800 mg tablet	2020-05-04	Executed		800 mg				Take 800 mg by mouth 3 (three) times daily with meals. 1 tablet 3 x daily with meals and 2 x daily with snacks	0	Duke University Health System
fluticasone (FLONASE) 50 mcg/actuation nasal spray	2020-05-04	In-Progress		2 {spray}				Place 2 sprays into both nostrils once daily.	0	Duke University Health System
cetirizine (ZYRTEC) 10 mg capsule	2020-05-04	Executed		10 mg				Take 10 mg by mouth once daily.	0	Duke University Health System
albuterol (ACCUNEB) 0.63 mg /3 mL nebulizer solution	2020-05-04	In-Progress		.63 mg				Take 0.63 mg by nebulization every 6 (six) hours as needed for Wheezing.	0	Duke University Health System
clopidogrel (PLAVIX) 75 mg tablet	2020-05-04	In-Progress		75 mg				Take 75 mg by mouth once daily.	0	Duke University Health System

Patient Summary Report for ADULT DEMO

DSM – Medication Reconciliation

Attach the Medication PDF report to a DSM message to the PCP by searching in the “To” box or clicking “Send to PCP” (warning this could be inaccurate as it is based on data sent to the system).

Compose Message - Work - Microsoft Edge

https://demo.nhealthconnex.net/hsdemoag1/csp/healthshare/hsaccess/NCHIE.HS.UI.Push.SendMessage.cls?\$ZEN_POPUP=1&errstatus=1&CPSHARE=1&mode=C

To: [Send to PCP](#)

Cc: [CC to PCP](#)

☐ Delivery Policy:

Subject:

Note:

Hi Dr. Hunt,

Please see the attached medication list for medication reconciliation. If you have any questions, please let me know. Thank you.

Care Manager

Attachments:

Clinical Portal Quick Reference Guide – Print Patient Records

DEMO, ADULT

F 49y 07/07/1975 MPI: 100000021

There may still be restricted data that you are not permitted to view.

ⓘ Override Applied

[Back to: Chart](#) >



Chartbook

Clinical Summary

Conditions

Allergies

Medications

Documents

Immunizations

Vital Signs

Lab Results

Diagnostic Studies

Procedures

Histories

Encounters

Appointments

Medications

Current Medications

Details	Medication	Dose	Frequency	Status	Source	Start Date
---------	------------	------	-----------	--------	--------	------------

Historical Medications

Details	Medication	Dose	Frequency	Status	Source	Start Date
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		04/23/2020 00:00
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive	Sample Provider	04/22/2020 06:00
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		04/21/2020 06:00
⋮	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 2.5 g/500 mL	2.5 g		Inactive	Sample Provider	04/20/2020 16:46
⋮	Vancomycin to be dosed by nephrology			Inactive		04/20/2020 14:40
⋮	vancomycin pharmacy consult			Inactive		04/20/2020 13:21
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g		Inactive		11/16/2019 06:00
⋮	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 1.5 g/250 mL	1.5 g		Inactive		11/15/2019 15:43
⋮	Vancomycin - Nephrology to dose in HD patient.			Inactive	Sample Provider	11/15/2019 12:05

To print, click on the horizontal ellipses (meatball menu) on the right of the screen.

Clinical Portal Quick Reference Guide – Print Patient Records

The screenshot displays the Clinical Portal interface for a patient named DEMO, ADULT. The patient's details (F, 49y, 07/07/1975, MPI: 100000021) are shown at the top. A notification in the top right corner states: "There may still be restricted data that you are not permitted to view. @ Override Applied". The left sidebar contains a "Chartbook" menu with options: Clinical Summary, Conditions, Allergies, Medications (selected), Documents, Immunizations, Vital Signs, Lab Results, Diagnostic Studies, Procedures, and Histories. The main content area shows the "Medications" section, which is divided into "Current Medications" and "Historical Medications". The "Historical Medications" table lists several entries for vancomycin (VANCOCIN) with details on dosage and frequency. A red box highlights the "Patient Reports" link in the top right corner of the main content area, with a red arrow pointing to it.

DEMO, ADULT
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@ Override Applied

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[Patient Reports](#)

Chartbook << ▲

- Clinical Summary
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- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories

Medications

▼ **Current Medications**

Details	Medication	Dose	Frequency	Status
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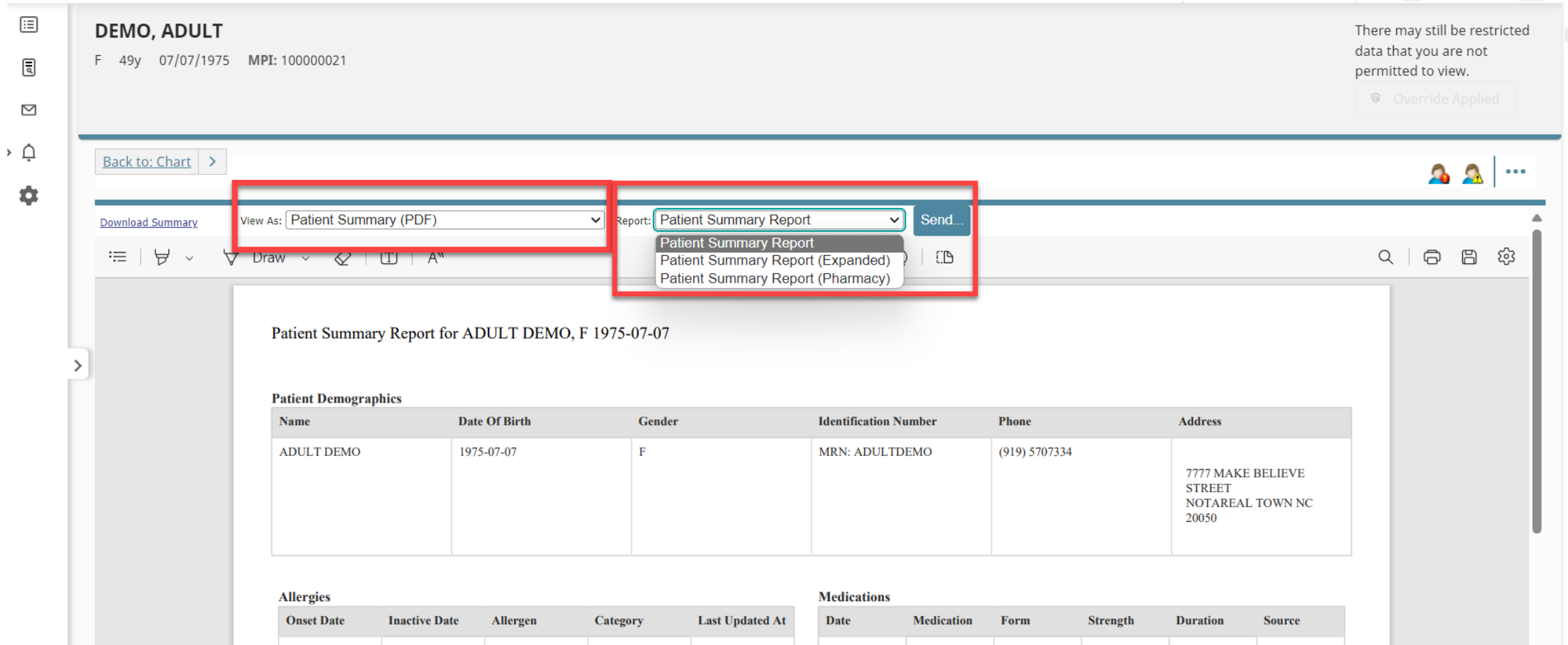
▼ **Historical Medications**

Details	Medication	Dose	Frequency
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g	
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g	
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g	
⋮	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 2.5 g/500 mL	2.5 g	
⋮	Vancomycin to be dosed by nephrology		
⋮	vancomycin pharmacy consult		
⋮	vancomycin (VANCOCIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g	
⋮	vancomycin (VANCOCIN) in 0.9% sodium chloride IVPB 1.5 g/250 mL	1.5 g	

Then click on "Patient Reports".

Clinical Portal Quick Reference Guide – Print Patient Records

Make sure “View As” is set to “Patient Summary (PDF)” and that “Report” is set to either “Expanded” (for full chart view) or “Pharmacy” (for pharmacy dispense information).



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Override Applied

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Download Summary

View As: Patient Summary (PDF) Report: Patient Summary Report Send...

Patient Summary Report for ADULT DEMO, F 1975-07-07

Patient Demographics

Name	Date Of Birth	Gender	Identification Number	Phone	Address
ADULT DEMO	1975-07-07	F	MRN: ADULTDEMO	(919) 5707334	7777 MAKE BELIEVE STREET NOTAREAL TOWN NC 20050

Allergies

Onset Date	Inactive Date	Allergen	Category	Last Updated At
2016-12-12		PENICILLIN	DRUG	2016-12-12

Medications

Date	Medication	Form	Strength	Duration	Source
2016-05-04			500		P

Clinical Portal Quick Reference Guide – Print Patient Records

You can use the magnifying glass icon to search the PDF for specific information such as medications or vaccinations.

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There may still be restricted data that you are not permitted to view.
Override Applied

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Download Summary View As: Patient Summary (PDF) Report: Patient Summary Report (Expanded) Send...

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Print (Ctrl+P)

Patient Summary Report for ADULT DEMO

Patient Demographics

Name	Date Of Birth	Gender	Identification Number	Phone	Address
ADULT DEMO	1975-07-07	F	MRN: ADULTDEMO	(919) 5707334	7777 MAKE BELIEVE STREET NOTAREAL TOWN NC 20050

Allergies

Onset Date	Inactive Date	Allergen	Category	Last Updated At
2016-12-13		Ragweed	Propensity to adverse reactions to drug	DUHS

Alerts

(none)

Advance Directives

From Date	To Date	Directive	Type	Status
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Clinical Portal Quick Reference Guide – Print Patient Records

Click the printer icon to print the chosen record.

DEMO, ADULT

F 49y 07/07/1975 MPI: 100000021

There may still be restricted data that you are not permitted to view.
Override Applied

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Download Summary View As: Patient Summary (PDF) Report: Patient Summary Report (Expanded) Send...

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Print (Ctrl+P)

Patient Summary Report for ADULT DEMO

Patient Demographics

Name	Date Of Birth	Gender	Identification Number	Phone	Address
ADULT DEMO	1975-07-07	F	MRN: ADULTDEMO	(919) 5707334	7777 MAKE BELIEVE STREET NOTAREAL TOWN NC 20050

Allergies

Onset Date	Inactive Date	Allergen	Category	Last Updated At
2016-12-13		Ragweed	Propensity to adverse reactions to drug	DUHS

Alerts

(none)

Advance Directives

From Date	To Date	Directive	Type	Status
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Clinical Portal Quick Reference Guide – Print Patient Records

Select which pages you want to print and click the “print” button.

Print

Total: 6 sheets of paper

Copies

1

Layout

☐ Portrait

☒ Landscape

Pages

☐ All

☐ Odd pages only

☐ Even pages only

☒ 50-55

Color

Color

Print on both sides

Print

Cancel

Patient Summary Report for ADULT DEMO

Medication	Date	Status	Form	Strength	Duration	Qty	Indications	Instruction	Refills	Source
DS) 800-160 m g tablet										
loratadine (CL ARITIN) 10 m g tablet	2014-08-21	Executed			1892 days			Take by mouth	0	Duke University Health System
ciprofloxacin H CI (CIPRO) 25 0 MG tablet	2012-05-19	Executed			2716 days			Take by mouth	0	Duke University Health System
aspirin 325 M G tablet	2011-03-31	Executed			3131 days			Take by mouth	0	Duke University Health System
b complex mul tivitamin (NEP HROCAPS) 1 mg capsule	2011-03-29	Executed		1 {capsule}				Take 1 capsule by mouth once daily.	0	Duke University Health System
famotidine (PE PCID) 20 MG tablet	2011-03-29	In-Progress		20 mg				Take 20 mg by mouth once daily.	0	Duke University Health System
b complex mul tivitamin (NEP HROCAPS) 1 mg capsule	2011-03-29	In-Progress		1 {capsule}				Take 1 capsule by mouth once daily.	0	Duke University Health System
omeprazole (P RILOSEC) 20 MG DR capsu le	2008-03-18	Executed		20 mg				Take by mouth	0	Duke University Health System
ferrous fumara te-folic acid 32 4 mg (106 mg i ron)-1 mg	2007-11-21	Executed						Take by mouth	0	Duke University Health System

Code	Vaccine	Date	Route	Site	Source
	Influenza H1N1 IM pres-free	2016-09-01			Duke University Health System

Clinical Portal – How to find PCP for messaging: Demographics

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- Cohorts
- Demographics**
- Insurance
- CSRS Report

Demographics

Demographics

Patient Details

Title	
Surname	DEMO
Given Name	ADULT
Middle Name	
Suffix	
Gender	F
Date of Birth	07/07/1975
Age	50
SSN	
Driving License	
Preferred Language	
Translator Required	

Address Details

Address	7777 MAKE BELIEVE STREET
City	NOTAREAL TOWN
State	NC
Post Code	20050
Country	USA
Home Telephone	(919) 5707334
Business Phone	
Mobile Phone	(919) 5707334
Email	

[Other Address](#)

Local Doctor Details	
GP Name	

Clinical Details

Blood Type	
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[Allergen EMR](#)

Additional Demographics

Race	2106-3
Marital Status	S
Religion	

Information about Death

Date of Death	
Time of Death	
Location of Death	
Declared Deceased By	

[MRN](#)

Contacts

Surname	Given Name	Relationship	Type	Mobile Phone	Home Phone	Email	Address	Entered On
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Clinical Portal – How to find PCP for messaging: Encounters

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Encounters

Start Date	Type	Organization	Facility	Department	Treating Care Provider	Encounter
02/07/2025 09:13	Outpatient	University of NC HCS	Wayne Memorial Hospital	UNC PRIMARY CARE AT GOLDSBORO	EMILY WOOD LONG	380121520
02/06/2025 15:49	Inpatient	Duke University Health System	Duke Regional Hospital	DRH BEHAVIORAL HEALTH INPATIENT UNIT	LESLIE LARISSA BRONNER	374531609
01/06/2025 09:50	Outpatient	Duke University Health System	Duke Raleigh Hospital	SOUTHEASTERN ORTHOPEDICS	KEVIN PAUL SPEER	371684029
01/05/2025 08:00	Outpatient	University of NC HCS	Watauga Medical Center	PERIOP ARWH	PAUL SAMI DAGHER	379374047
05/04/2020 10:37	Outpatient	Duke University Health System	Duke University Health System			192468220
04/27/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468220
04/24/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468220
04/20/2020 11:41	Inpatient	Duke University Health System	Duke University Health System			192468220
04/20/2020 10:54	Outpatient	Duke University Health System	Duke University Health System			192468219
04/15/2020 09:33	Outpatient	Duke University Health System	Duke University Health System			192468219
04/13/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468219
03/09/2020 12:07	Outpatient	Duke University Health System	Duke University Health System			192468210
02/24/2020 11:23	Inpatient	Duke University Health System	Duke University Health System			192468210
02/20/2020 11:00	Outpatient	Duke University Health System	Duke University Health System			192468210
02/20/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468210
02/14/2020 12:50	Outpatient	Duke University Health System	Duke University Health System			192468219
02/12/2020 11:08	Outpatient	Duke University Health System	Duke University Health System			192468219
02/12/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			192468219

Clinical Portal – How to find PCP for messaging: Appointments

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Appointments

Current Appointments

Type	Provider	Facility	Status	Appointment
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Historical Appointments

Type ↕	Provider ↕	Facility ↕	Attendan
Ancillary Procedure			
Ancillary Procedure	Sample Provider Sample Provider (366258_t20)	Some Hospital Triangle Heart Associates	
Appointment			
Appointment		Some Hospital Regional Hospital Interventional Radiology	
Appointment		Some Hospital Regional Hospital Interventional Radiology	
Hospital Encounter			
Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop	
Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop	
Hospital Encounter	Sample Provider Sample Provider (1022623_t20)	Some Hospital Regional Hospital Periop	
Hospital Encounter		Some Hospital Regional Hospital Interventional Radiology	
Initial consult			
Initial consult	Sample Provider Sample Provider (366258_t20)	Some Hospital Triangle Heart Associates	
Office Visit			
Office Visit	Sample Provider Sample Provider	Vascular Access	
Office Visit	Sample Provider Sample Provider (1022623_t20)	Vascular Access	
Office Visit	Sample Provider Sample Provider	Vascular Access	

Thank You!



**For more information visit,
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E-mail: hiea@nc.gov