



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.



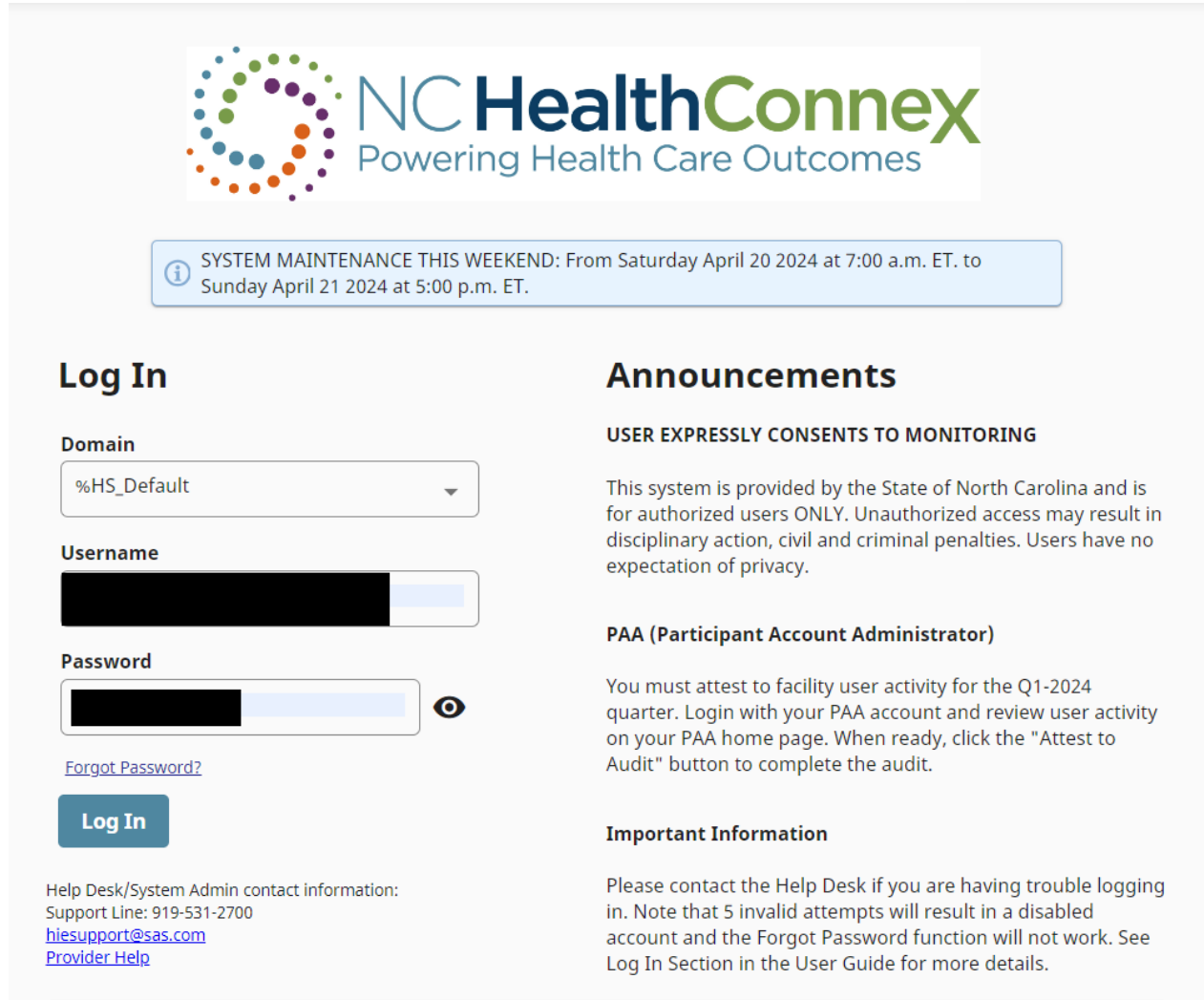
Getting Started With NC HealthConnex

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] [Eye Icon]

[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

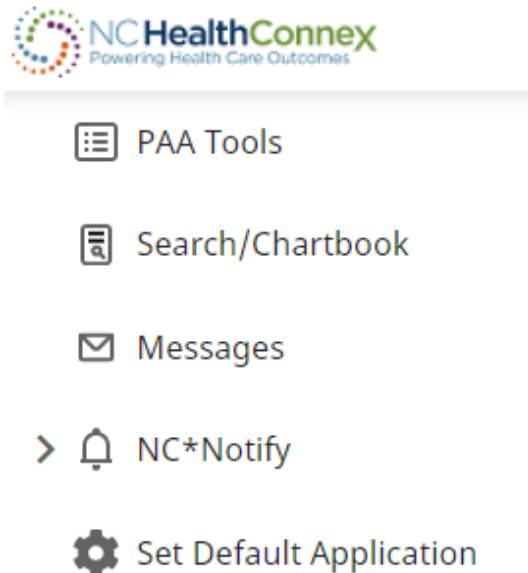
Confidentiality of psychotherapy notes: (45 C.F.R. 164.501). This information has been disclosed to you from records whose confidentiality is protected by the HIPAA Privacy and Security Rule. You are prohibited from making any further disclosure of it without the specific written consent of the person 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.

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.

The screenshot displays a 'Patient Search' window with two main panels. The left panel, titled 'Patient Search', contains several input fields: 'MRN' (text box), 'Assigned By' (dropdown menu), 'Last Name' (text box), 'First Name' (text box), 'Middle Name' (text box), 'Date of Birth' (calendar icon), and 'Social Security Number' (text box). The right panel, titled 'Patient Search Results', shows 'No Results' and lists '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)

Clinical Portal Quick Reference Guide – Patient Search

The screenshot displays the 'Patient Search' interface. On the left is a search filter panel with fields for MRN, Assigned By, Last Name (demo), First Name (adult), Middle Name, Date of Birth, and Social Security Number. At the bottom of this panel are 'Clear' and 'Search' buttons. The main area shows 'Patient Search Results' for a patient with MPI 100000021, Name DEMO, ADULT, Gender F, DOB 07/07/1975, and Address 7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20050. A warning icon is present next to the patient's name. A blue button labeled 'Declare Patient Relationship' is highlighted with a red box, and a red arrow points to it from below.

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

The screenshot shows the 'Patient Search' interface. On the left, there are search filters for MRN, Assigned By, and Last Name (with 'demo' entered). The main area displays 'Patient Search Results' with a warning icon and the text 'Declare Patient Relationship for records with this warning...'. A table lists search results with columns for MPI, Name, Gender, DOB, and Address. The first result is for MPI 100000021, Name DEMO, ADULT, Gender F, DOB 07/07/1975, and Address 7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20000. A red box highlights the 'Declare Patient Relationship' button, and a red arrow points to it from below.

MPI	Name	Gender	DOB	Address
> 100000021	DEMO, ADULT	F	07/07/1975	7777 MAKE BELIEVE STREET, NOTAREAL TOWN NC 20000

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

Clinical Portal Quick Reference Guide – Patient Search

Select the reason you are breaking the seal/accessing the patient information from the drop-down menu.

The screenshot displays the 'Patient Search' interface. On the left, there is a search form with fields for MRN, Assigned By, Last Name (demo), First Name (adult), Middle Name, Date of Birth, and Social Security Number. At the bottom of the form are 'Clear' and 'Search' buttons. The main area shows 'Patient Search Results' with a table header including MPI, Name, Gender, DOB, and Address. A warning message at the top right says 'Declare Patient Relationship for records with this warning.' with a 'Declare Patient Relationship' button. A modal dialog box titled 'Declare Patient Relationship' is open in the center. It contains the following text: 'Data in NC HealthConnex does not indicate that you have been granted full consent with the patient you have searched. In order to gain one-time access to a patient's record, you must "Break the Seal". This declaration will be audited once you have selected a patient. Click "Declare Relationship" to continue, or click "Cancel" to return to the search results.' Below this text is a 'Reason For Override*' section with a dropdown menu. The dropdown is open, showing options: '-- Select Reason --', 'I am a clinician treating this patient', 'Care coordination', 'Conducting a quality audit check', and 'Conducting a privacy/administrative audit'.

Clinical Portal Quick Reference Guide – Patient Search

Patient Search

Patient Search

MRN

Assigned By

Last Name

First Name

Middle Name

Date of Birth

Social Security Number

Patient Search Results There may still be restricted data that you are not permitted to view. ↗

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.

NC HealthConnex Powering Health Care Outcomes

Patient Selection ▾ [Profile Icon] [Redacted]

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: Patient Search >

Chartbook

- Clinical Summary
- Conditions
- Allergies
- Medications
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories
- Encounters
- Appointments

Allergies Sorted by Last Updated, Status

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

Medications Sorted by Start Date

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

Page 1 [Next >](#)

Documents Sorted by Activity Date, Activity Time

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

Lab Results Sorted by Result Date

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

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](#) >

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

Override Applied

Chartbook <<

- Clinical Summary
- Conditions
- Allergies
- Medications**
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories
- Encounters

Medications

vancomycin

▼ **Current Medications**

Details	Medication	Dose	Frequency	Status	Source	Start Date
vancomycin						

▼ **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

Clinical Portal Quick Reference Guide – Print Patient Records

DEMO, ADULT
F 49y 07/07/1975 MPI: 10000021

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

vancomycin

vancomycin

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

DEMO, ADULT
F 49y 07/07/1975 MPI: 100000021

Back to: Chart >

Chartbook << ↑

- Clinical Summary
- Conditions
- Allergies
- Medications**
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories

Medications

Current Medications

Details	Medication	Dose	Frequency	Status
	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		

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	

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

Patient Reports

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).

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 >

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

Patient Summary Report (Expanded)
Patient Summary Report (Pharmacy)

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
2016-10-12		Penicillin	Penicillin	2016-10-12

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.

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 >

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

1 of 115

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

[Back to: Chart](#) >

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

1 of 115

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

Layout

Portrait

Landscape

Pages

All

Odd pages only

Even pages only

Color

Print on both sides

Patient Summary Report for ADULT DEMO

Medication	Date	Status	Form	Strength	Duration	Qty	Indications	Instruction	Refills	Source
DS) 800-160 m g tablet										
loratadine (CLARITIN) 10 m g tablet	2014-08-21	Executed			1892 days			Take by mouth	0	Duke University Health System
ciprofloxacin HCl (CIPRO) 250 MG tablet	2012-05-19	Executed			2716 days			Take by mouth	0	Duke University Health System
aspirin 325 MG tablet	2011-03-31	Executed			3131 days			Take by mouth	0	Duke University Health System
b complex multivitamin (NEPHROCAPS) 1 mg capsule	2011-03-29	Executed		1 {capsule}				Take 1 capsule by mouth once daily.	0	Duke University Health System
famotidine (PEPCID) 20 MG tablet	2011-03-29	In-Progress		20 mg				Take 20 mg by mouth once daily.	0	Duke University Health System
b complex multivitamin (NEPHROCAPS) 1 mg capsule	2011-03-29	In-Progress		1 {capsule}				Take 1 capsule by mouth once daily.	0	Duke University Health System
omeprazole (PRILOSEC) 20 MG DR capsule	2008-03-18	Executed		20 mg				Take by mouth	0	Duke University Health System
ferrous fumarate-folic acid 324 mg (106 mg iron)-1 mg	2007-11-21	Executed						Take by mouth	0	Duke University Health System

Thank You!



**For more information visit,
www.nchealthconnex.gov**

Tel: 919-754-6912

E-mail: hiea@nc.gov