

NC HEALTHCONNEX CLINICAL PORTAL

USER 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.

Contact Details:

Participating Organization: _____

Participant Account Administrator (PAA) Name: _____

Participant Account Administrator (PAA) Phone/Email: _____

NC HIEA Business Office:

For questions related to this user guide, please call 919-754-6912 or email hiea@nc.gov.

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INTRODUCTION

Welcome

Welcome to the North Carolina Health Information Exchange Authority (NC HIEA) and the state-designated health information exchange (HIE), NC HealthConnex. Your participation in NC HealthConnex will enable you and other participating organizations to:

- Save time and reduce paperwork
- Facilitate more informed treatment decision-making
- Improve care coordination
- Enable better health outcomes

Purpose

The North Carolina Health Information Exchange Authority (NC HIEA) operates NC HealthConnex to provide a secure and integrated view of a patient's longitudinal health record. Our mission is to link all health care providers across North Carolina to improve health care quality and outcomes.

This document is intended as a guide for all users to provide basic Clinical Portal navigation information for NC HealthConnex. For an up-to-date list of participating organizations, visit the NC HealthConnex website to see [Who's Connected](#).

What Is the NC HealthConnex Clinical Portal?

The NC HealthConnex Clinical Portal is a secure, standardized electronic system through which providers can share important patient health information. The use of this system promotes the exchange and analysis of patient health information from many disparate electronic health record (EHR) systems throughout North Carolina in a consolidated and efficient manner.

Once logged in, clinicians can view a patient's medical history including allergies, medications, problem lists, procedures, lab results, radiology reports, immunization history, and other important information from providers across the state as well as bordering states that have seen the patient—even if those providers are not part of the same practice or health system. The NC HIEA does not require providers to use an EHR or to purchase special software to be able to leverage the NC HealthConnex Clinical Portal, as it is a web-based application.

The basic functions of the NC HealthConnex Clinical Portal include:

- Search for patients
- View demographic and clinical information
- Download or print patient information to include in a patient record
- Send messages and patient records to and receive messages from other providers

The NC HealthConnex Clinical Portal offers its users access to:

- Direct Secure Messaging, which allows providers to securely exchange patient information via a HIPAA (Health Insurance Portability and Accountability Act) compliant email system, and access to the NC HealthConnex provider directory (containing 30,000+ provider addresses).
- Patient records from other HIEs and systems nationwide via eHealth Exchange, which queries other state, interstate and national HIEs, including the Veterans Health Administration HIE and the Department of Defense (DoD), for any available records upon patient search by a user. The Patient Centered Data Home, based on triggering alerts of a patient's home zip code, also notifies providers when a care event has occurred outside the patient's "home" HIE and confirms the availability and specific location of the clinical data, enabling providers to initiate additional data exchanges to access real-time information across state and regional lines and the care continuum.

The NC HIEA is working to expand its service offerings to improve the tangible value of statewide HIE to providers across North Carolina. Many projects currently under development will be added to the NC HealthConnex infrastructure as they are completed. For more information, visit the [Suite of Services](#) on the NC HealthConnex website.

Role-Based Permissions

Access to the NC HealthConnex Clinical Portal is granted to clinicians and other users that provide patient care in a variety of settings, including offices, clinics, emergency departments, hospitals and others.

The Clinical Portal is configured with various views and functionality that end users can access based on appropriateness to their role(s) and responsibilities in the patient care process per HIPAA. Not all views need to be accessed by all users, and access is based on sensitivity of information and relevance to the user.

A full list of the types of Clinical Portal functionality and information accessible to each user group role is provided below.

Clinical Portal Functionality	Clinician	Clerical	PAA User Admin	Clinician & PAA Admin
View Clinical Portal Home Page	X	X		X
View User Administration Home Page			X	X
Search for Patients	X	X		X
Break the Privacy Seal (Patient Level Access)	X			X
View Demographics	X	X		X
View Encounter History	X			X
View Allergies	X			X
View Medication History	X			X
View Problems	X			X
View Procedures	X			X
View Lab & Pathology Results	X			X
View Radiology Reports	X			X
View Clinical Documents	X			X
View Continuity of Care Documents	X			X
Access NC*Notify Notifications *Additional enrollment steps required.	X		X	X
Search CSRS *Additional enrollment steps required.	X		X	X
View/Compose DSM Messages *Additional enrollment steps required.	X	X	X	X

CLINICAL PORTAL USER INTERFACE

The NC HealthConnex Clinical Portal user interface refers to the menus, icons, buttons, and other user information on the various screens that help you interact with the application.

Menus

Depending on where you are within the Clinical Portal, the menu bar will vary in appearance to aid you in navigating to other screens.

Main Menu: This refers to the primary menu that will display at the top left of the screen upon logging in to the Clinical Portal or while on the Clinical Portal Home Page (also the **Patient Search** screen).



This menu displays links to the following views:





- **Patient Search:** This link returns you to the Patient Search screen, which is the default home screen upon login.
- **Messages:** This link takes you to your Messaging Center inbox and allows you to send, receive, delete, and organize your Direct Secure Messages (DSM).
- **Clinician Tools:** This link allows you to create patient lists and take actions directly from those lists (such as send a message about a patient or view a patient summary). It allows you to tag patients with one of three common patient-provider relationships. This section also allows you to view recent patients that have been searched.
- **NC*Notify: If enrolled,** this link will allow you to access the care coordination tool. This tool will provide you with 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.
- **My Account:** This link takes you to your user profile, where you can update your password and other account details.
- **Logout:** This link logs you out of the Clinical Portal.
- **Help:** This link opens a new window or tab on your web browser to the Training & Tools section of the NC HIEA website. Here you may access Clinical Portal video tutorials, get help with Clinical Portal credentials, and find other tools and information related to the Clinical Portal.

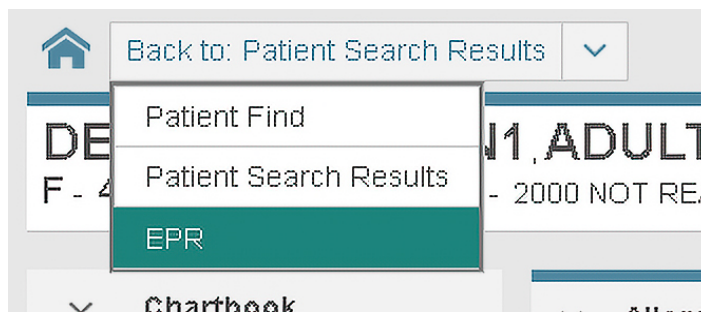
The **Limited View Menu** refers to a secondary menu that will display at the top left of the screen when in the Messages or Clinician Tools views. This menu will simply navigate you back to the Clinical Portal Home Page (also the **Patient Search** screen) or allow you to **log out** of the application and is shown below.



Buttons

When navigating the clinical information within a patient record, you should note the following buttons/icons and their functions:

-  A **home button** icon below the main menu will take you back to the patient search screen.
-  A **vertical blue ellipsis icon**, often seen under a column titled “Details,” indicates that more information may be available. Simply click on the icon to open a windowlet at right or a new pop-up window with this information. To close a windowlet, click the **X** in the upper right-hand corner, or click the blue ellipsis icon next to the original row of data again. To close a new pop-up window, click the **X** in the upper right-hand corner of the window.
- Page 1 [Next >](#) A **paging arrow icon** at the bottom of a list of information indicates that additional entries exist. The number to the left of the arrow indicates which page of entries you are currently viewing. You may click the Next arrow icon at the bottom of a list to navigate between pages of entries.
- A **horizontal blue ellipsis icon**  on the far right of the patient demographic row will display patient summary reports. See the **Reports** section for additional information.
-  A **sort icon** often appears on multiple sections throughout a patient’s chartbook. The sort will allow you to sort in chronological or reverse chronological order. In some cases, you can apply a secondary sort.
- A navigation box allows you to navigate to a previous section of the patient’s record.
 - Patient Find:** Takes you back to the search screen where you can search a new patient.
 - Patient Search Results:** Takes you back to the **Patient Search Results** from the current search being performed.
 - EPR:** Takes you back to the **Electronic Patient Record** if you clicked on a section for more detailed information.



Working in Windowlets

Many links and buttons within the patient record screen of the Clinical Portal will open in a new window. These windowlets may be navigated by adjusting (moving) or scrolling up and down various gray scroll bars. The gray scroll bars may appear on any side of the windowlet (top, bottom, right or left).

Logging In to the Clinical Portal

This section explains how to log in to the NC HealthConnex Clinical Portal and contains information about password requirements.

To log in to the Clinical Portal, copy and paste the NC HealthConnex Clinical Portal URL (<https://portal.nchealthconnex.net>) or type it into an Internet browser, such as Microsoft® Edge or Mozilla® Firefox®. Once you have entered the URL, the login screen is displayed, as shown below.



The login screen features the NC HealthConnex logo at the top, followed by two input fields: 'Username' and 'Password'. Below these fields is a blue 'Login' button.

NC HIEA PRODUCTION ENVIRONMENT

The North Carolina Health Information Exchange Authority (NC HIEA) operates North Carolina's statewide health information exchange, NC HealthConnex. This secure, standardized electronic system promotes the access, exchange, and analysis of health information.

Login Agreement

Please note that every time you login, you are agreeing to the terms signed by your organization that provided you with a unique User ID, including (but not limited to) the following:

- I will only access patient information for treatment, payment, or health care operation purposes as defined by HIPAA and as permitted by the NC HIEA Participation Agreement
- I understand that all access of patient information is monitored and recorded
- I will safeguard patient information from inappropriate disclosure
- I will immediately report any suspected breach of patient information to my supervisor, if applicable
- I will immediately report any suspected breach of patient information to the NC HIEA and HIEA Help Desk at HIEALegal@nc.gov and HIESupport@sas.com
- I will not share my User ID or password with anyone

Questions? Contact us: <http://hiea.nc.gov/contact>

A username and password are required to gain access to the application. To obtain a username and password, contact your organization's Participant Account Administrator (PAA).

First-Time Log In

To log in for the first time, you will enter the username and temporary password as assigned by your organization's PAA upon account creation. Once you have entered the username and temporary password, the system will prompt you to change the password and enter a challenge question and answer that may be used to update a forgotten password later, as shown below.

Current Password:

New Password:

Confirm Password:

Your answer to the following chosen question will be used to verify your identity in the event you forget your username, become locked out of your account, or are unable to receive a password reset email. In these cases, the SAS NC HealthConnex Help Desk will be able to view the answers to these questions for the purpose of verifying your identity.

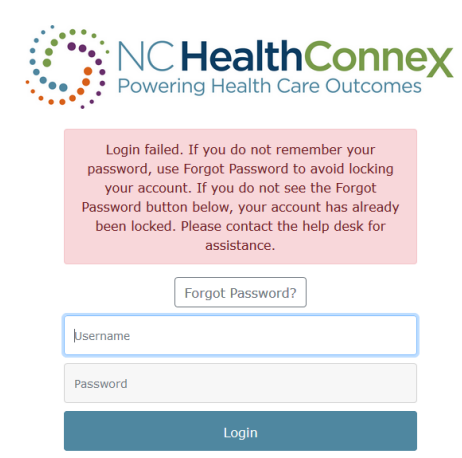
*****Note:** You may change your password and challenge question and answer at any time in the **Account** tab in the **My Account** section of the Clinical Portal. The NC HealthConnex Help Desk can view your challenge question and answer.

New Challenge Question:

New Challenge Answer:

Forgotten Password

If you enter an incorrect password, you are notified that “Login Failed” and a **Forgot Password?** box appears, as shown below.




NC HealthConnex
Powering Health Care Outcomes

Login failed. If you do not remember your password, use Forgot Password to avoid locking your account. If you do not see the Forgot Password button below, your account has already been locked. Please contact the help desk for assistance.

[Forgot Password?](#)

When clicked, the box allows you to answer your challenge question. If answered correctly, you will receive an email at the email address linked to your Clinical Portal account with a temporary password which allows you to reset your password from the login screen.



NC HealthConnex
Powering Health Care Outcomes

Forgot Password [X]

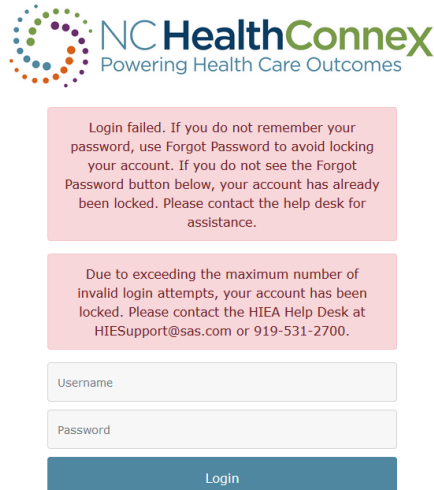
CHALLENGE QUESTION FOR DEMO1:
What is name of work building?

operates North Carolina's statewide health information exchange, NC H

Upon entering the correct answer to the challenge question, you will receive an email to the email account on file with NC HealthConnex with a temporary password. The email will be sent from no-repies-hie@sas.com.

If incorrect information is entered, the system may lock your account, and you must contact your organization's PAA to unlock the account.

If you attempt to log in five times with an incorrect username and/or password, you will see the message, "Due to exceeding the maximum number of invalid login attempts, your account has been locked. Please contact the NC HIEA Help Desk at HIESupport@sas.com or 919-531-2700."



The screenshot shows the NC HealthConnex login interface. At the top is the logo. Below it are two pink error messages. The first message states: "Login failed. If you do not remember your password, use Forgot Password to avoid locking your account. If you do not see the Forgot Password button below, your account has already been locked. Please contact the help desk for assistance." The second message states: "Due to exceeding the maximum number of invalid login attempts, your account has been locked. Please contact the HIEA Help Desk at HIESupport@sas.com or 919-531-2700." Below the messages are two input fields: "Username" and "Password". At the bottom is a blue "Login" button.

Security Requirements

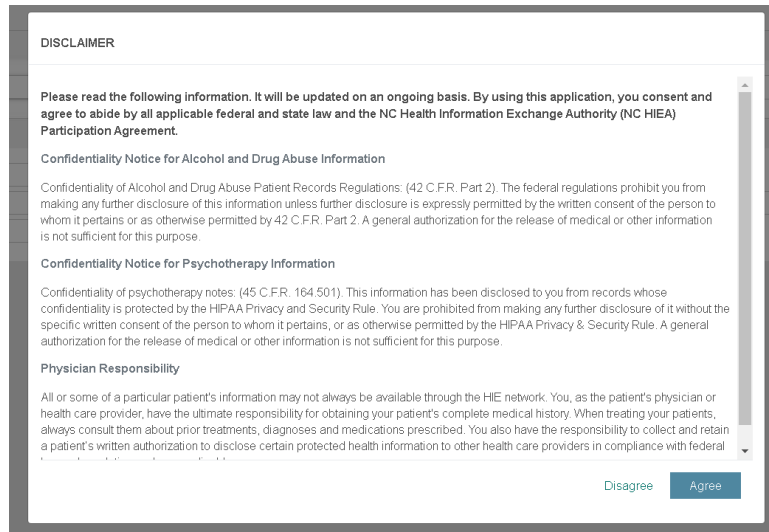
To keep NC HealthConnex secure from unauthorized access, the NC HIEA has implemented the following security requirements relative to user accounts and passwords:

- You must reset your password every 90 days.
- Passwords must contain a minimum of eight characters including a mix of uppercase, lowercase, numeric, and special characters (acceptable special characters include: *!@#\$%^&(){}[]:~<>.,?/~`_+ -=|\).
- When resetting a password, your past four passwords may not be repeated.
- Your account will become inactive if you have not logged in for 365 days.

If you have trouble logging in or changing a password, you should contact your organization's PAA.

Accepting the Disclaimer

Each time you successfully log in to the NC HealthConnex Clinical Portal, you must agree to a standard disclaimer to gain access to the application. You must read and select the **Accept** button within 20 minutes or you will be automatically logged out and returned to the login page. The disclaimer information to which you must agree upon every log in is shown below.



Clinical Portal Home Page

The Clinical Portal home page, which defaults to the **Patient Search** view, appears when you log in to NC HealthConnex. This view contains the **Main Menu** at the top left of the display, where you can click links to navigate to other sections within the Clinical Portal or log out. The **Patient Search** box appears at the left of the display, providing quick access to search for a patient.

For more information on the **Patient Search** view and accessing clinical records, see the [Patient Search](#) and [Viewing Patient Information](#) sections of this user guide.

Logging Out of Clinical Portal

The **Logout** button is used to exit the NC HealthConnex Clinical Portal. The **Logout** button is accessible from all views within the Clinical Portal and is located at the far right of all three menu bars, as shown below.



It is important to use the **Logout** button as opposed to clicking on the **X** button of the browser. The **Logout** button will log you out of the application and close the session. If the logout function is not used, the session will remain active for 20 minutes without user activity before the **Automatic Logout** feature is activated. The **Automatic Logout** feature is a security measure to protect patient data in NC HealthConnex from unauthorized users who may share or access your computer.

*****Note:** To protect patient data, you are automatically logged out of the Clinical Portal after **20 minutes of inactivity**.

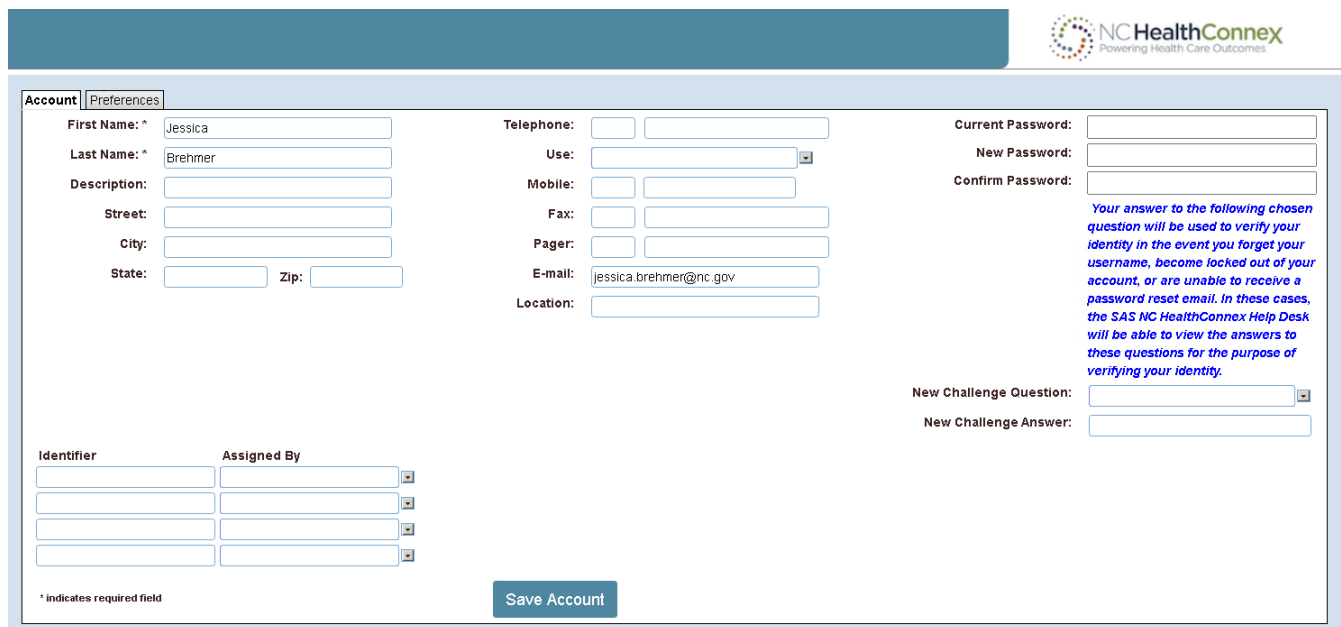
EDIT ACCOUNT DETAILS AND SPECIFY SYSTEM PREFERENCES

The **My Account** screen is the central location for changing account details like contact information, as well as customizing some of the ways in which you interact with the NC HealthConnex Clinical Portal.

To access and edit this information, select the **My Account** link from either the **Main Menu** or the **Patient View Menu**, as shown below.



Clicking on the **My Account** tab will produce a pop-up window where you may access and edit the information within the **Account** and **Preferences** tabs, as shown below.



The screenshot shows a pop-up window with two tabs: 'Account' (selected) and 'Preferences'. The 'Account' tab contains the following fields:

- First Name:** * Jessica
- Last Name:** * Brehmer
- Description:** [Text Field]
- Street:** [Text Field]
- City:** [Text Field]
- State:** [Dropdown] **Zip:** [Text Field]
- Telephone:** [Text Field]
- Use:** [Dropdown]
- Mobile:** [Text Field]
- Fax:** [Text Field]
- Pager:** [Text Field]
- E-mail:** jessica.brehmer@nc.gov
- Location:** [Text Field]
- Current Password:** [Text Field]
- New Password:** [Text Field]
- Confirm Password:** [Text Field]
- New Challenge Question:** [Dropdown]
- New Challenge Answer:** [Text Field]

Below the main fields is a table for 'Identifier' and 'Assigned By' with three rows of dropdown menus. A 'Save Account' button is at the bottom right. A note at the bottom left states: '* indicates required field'. A blue warning message on the right reads: 'Your answer to the following chosen question will be used to verify your identity in the event you forget your username, become locked out of your account, or are unable to receive a password reset email. In these cases, the SAS NC HealthConnex Help Desk will be able to view the answers to these questions for the purpose of verifying your identity.'

Account

The personal information in the **Account** tab may be edited as desired; however, the **First Name**, **Last Name**, and **E-mail** fields are required, as indicated by the asterisk (*). Note that these required fields will be pre-populated by the NC HIEA during account setup.

Fields available for edit/update on the **Account** tab, as shown above, include:

- Basic Demographics:
 - First Name (may only be edited by the NC HealthConnex Help Desk)
 - Last Name (may only be edited by the NC HealthConnex Help Desk)
 - Description (indicate the type of address; for example, "Work")
 - Street

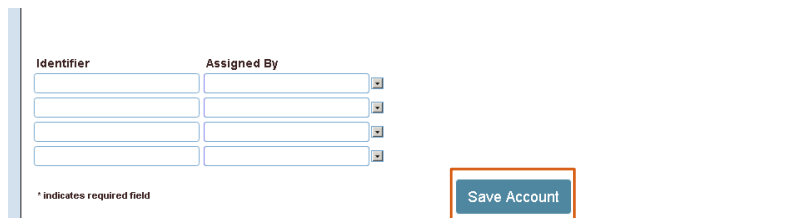
- City
- State
- Zip
- Telephone
- Use (select the type of telephone line from the drop-down menu)
- Mobile
- Fax
- Pager
- E-mail (this will be pre-populated, but may be edited)
- Location (indicate the type of email account; for example, “Work”)
- Account Security:
 - Current Password
 - New Password (enter a new password if desired)
 - Confirm Password (enter a new password a second time in this field to reset)
 - Challenge Question (select from the drop-down list of questions)
 - Challenge Answer (enter challenge answer)

****Note: Your answers to the chosen challenge question will be used to verify your identity in the event you forget your username, become locked out of your account, or are unable to receive a password reset email. In these cases, the SAS NC HealthConnex Help Desk will be able to view the answer to these questions for the purpose of verifying your identity.*

- Provider Identifiers:
 - Identifier (may only be edited by the NC HealthConnex Help Desk)
 - Assigned By (may only be edited by the NC HealthConnex Help Desk)

After making edits to account information, you should click the **Save Account** button at the bottom of the window.

****Note: Some fields may only be edited by the NC HealthConnex Help Desk. To make changes to these fields, contact your PAA.*



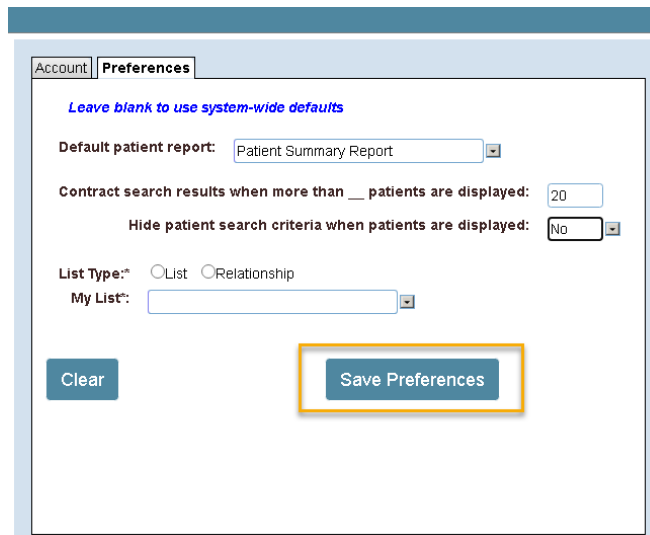
The screenshot shows a form with two columns of input fields. The first column is labeled 'Identifier' and the second is labeled 'Assigned By'. Each column contains four text input fields. Below the input fields, there is a small asterisk icon and the text '* indicates required field'. At the bottom right of the form, there is a blue button labeled 'Save Account'.

Preferences

The **Preferences** tab of the **My Account** pop-up window, shown below, allows you to configure some system settings. Fields available for edit/update on the **Preferences** tab include the following:

- **Default Patient Report:** you may use the drop-down menu to select either the regular or expanded patient summary view.
- **Contract Search Results:** you may enter a number to limit the results returned by a patient search when there are many matches.
- **Hide Patient Search Criteria:** the default view upon patient search keeps the search entry/criteria section visible at left, with a list of search results returned at the right. By selecting **Yes** from the drop-down menu, the search entry/criteria section at the left of the screen will disappear when search results are returned. This feature may be helpful if you are viewing this information on a small screen or mobile device.
- **List Type and My List:** please disregard these fields as they do not have any functionality tied to them and will be removed in a future system release.

After making edits to account information, you should click the **Save Preferences** button at the bottom of the window to save all changes.



Account | Preferences

Leave blank to use system-wide defaults

Default patient report: Patient Summary Report

Contract search results when more than patients are displayed:

Hide patient search criteria when patients are displayed: No

List Type:* List Relationship

My List:*

Clear Save Preferences

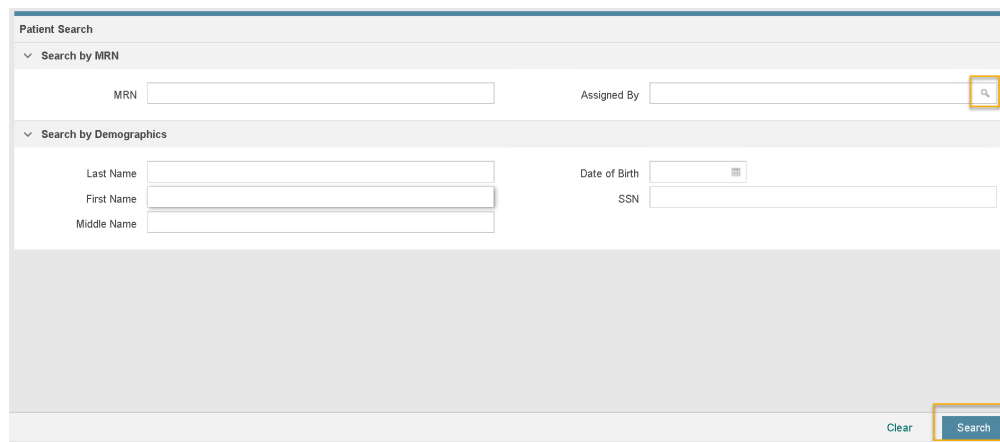
PATIENT SEARCH

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

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**.



The screenshot shows the 'Patient Search' interface. It has two main sections: 'Search by MRN' and 'Search by Demographics'.
 - Under 'Search by MRN', there is a text input field for 'MRN' and a dropdown menu for 'Assigned By' with a magnifying glass icon to its right.
 - Under 'Search by Demographics', there are three text input fields for 'Last Name', 'First Name', and 'Middle Name'. To the right, there is a date picker for 'Date of Birth' and a text input field for 'SSN'.
 - At the bottom right of the form, there are two buttons: 'Clear' and 'Search'.

Search by Demographic Information


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				
Identifier(s)	Name	Gender	DOB	Address
> 100222237...	Demonstration, Adult	M	1970-01-01	1000 Not Real Street, Medium Town NC 27519
> 100223858...	DEMONSTRATION1, ADULT1	F	1980-01-01	2000 NOT REAL STREET, MEDIUM TOWN NC 27519

Patient Search Results				
Identifier(s)	Name	Gender	DOB	Address
100222237...	Demonstration, Adult	M	1970-01-01	1000 Not Real Street, Medium Town NC 27519
RAH:M000001080	Demonstration, Adult	M	1970-01-01	1000 Not Real Street, Medium Town NC 27519
> 100223858...	DEMONSTRATION1, ADULT1	F	1980-01-01	2000 NOT REAL STREET, MEDIUM TOWN NC 27519

From a search result, you may click on the **Patient Name** to the right of the **Master Patient ID** to open the record, as shown below.

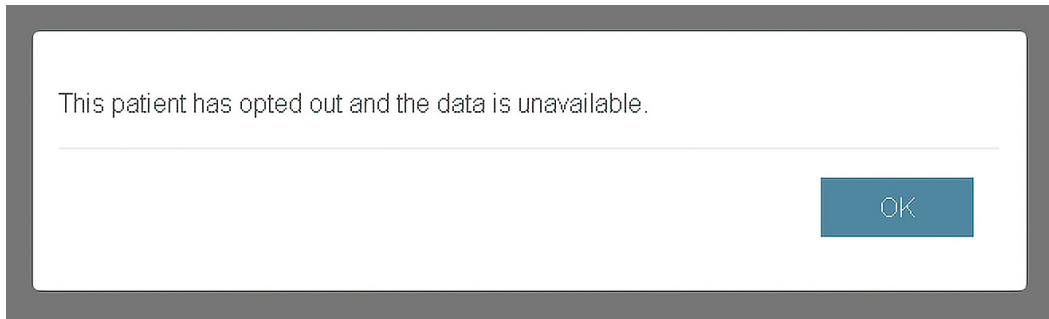
Patient Search Results				
Identifier(s)	Name	Gender	DOB	Address
> 100222237...	Demonstration, Adult	M	1970-01-01	1000 Not Real Street, Medium Town NC 27519
> 100223858...	DEMONSTRATION1, ADULT1	F	1980-01-01	2000 NOT REAL STREET, MEDIUM TOWN NC 27519

*****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.



NC HIEA Opt-Out Policy

Patients have the right to opt out of having their information shared between providers through NC HealthConnex. If a patient chooses to opt out, they are required to complete a form and mail it to the NC HIEA Business Office. Opting out of having their information shared via NC HealthConnex will not adversely affect patient treatment by any physician and patients cannot be discriminated against if they decide to opt out. Patients may also use the form to rescind a previous opt-out if they change their mind.

The primary opt-out process is for an HIE Administrator/Privacy Officer to manually change a patient’s status in the NC HealthConnex Clinical Portal.

****Note: Even if a patient has opted out of having their information shared via NC HealthConnex, their clinical data from participating health care entities will continue to be submitted to the NC HealthConnex data repository. The NC HIEA’s privacy and consent permissions simply hide an opted-out patient’s clinical data from all NC HealthConnex user’s view.*

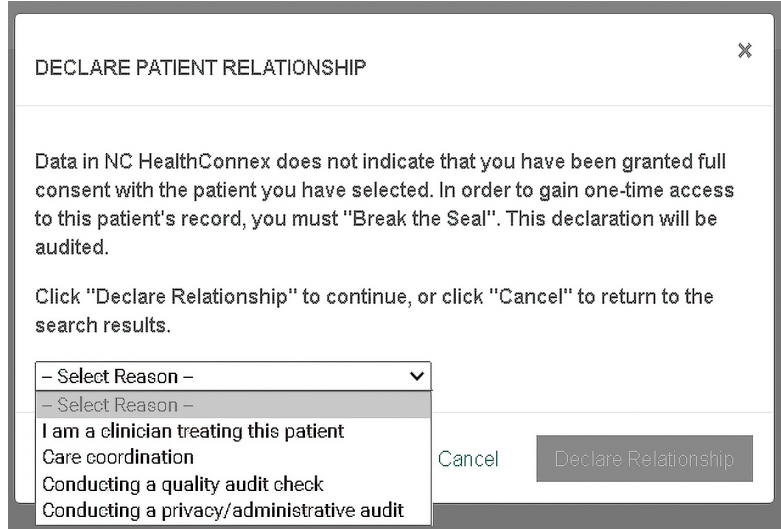
Break the Seal

To access a patient record, you must have an established relationship with a patient. If a data-driven relationship exists (meaning the user, if a clinician, or user’s facility has previously seen the patient and their contributed records for that patient are present in NC HealthConnex), you will be able to click a patient name and access the patient record instantly.

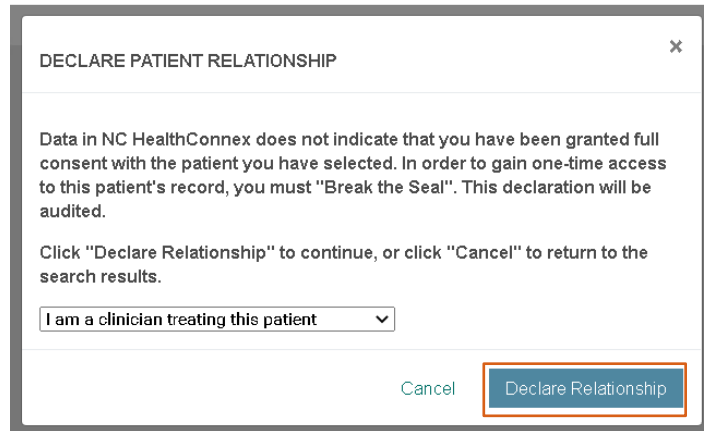
If you do not have a prior data-driven relationship with a patient, you may “Break the Seal” to receive temporary access to view a patient record.

To gain temporary access, you must do the following:

- Search for and select the patient record by clicking on the Patient Name. This will prompt the “Declare Patient Relationship” pop-up window, as shown below.
- Select a reason to view the record from the drop-down list of options.



- After selecting an option, select the Declare Relationship button to open the patient record.



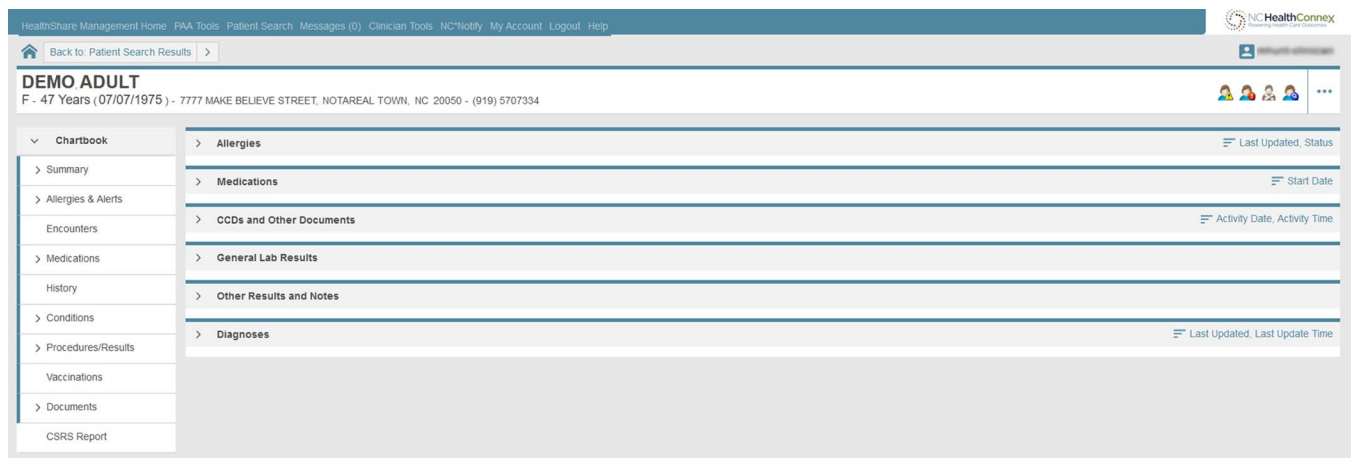
Permission to view a patient record for a patient with whom you do not have a data-driven relationship is temporary. This means that if you return to the **Patient Search** screen or another area of the Clinical Portal after viewing a record, you will need to repeat the “Break the Seal” process to access the record again or take actions relative to that patient from the **Clinician Tools** screen.

*****Note:** All instances of “Break the Seal” are logged and subject to audit.

VIEWING PATIENT INFORMATION

Within the NC HealthConnex Clinical Portal, you may access patient information received from various organizations participating with NC HealthConnex.


When a patient record is opened, this information is presented at the top of the patient record through quick reference alert icons and via tabs at the left of the **Patient View** screen that allow you to view an aggregated clinical summary and drill down to specific types of clinical data, like medications and diagnoses.



Demographic Information


When a patient record is opened, the patient's **Name, Age, Date of Birth, Address, and Phone Number** appear across the top of the screen, as shown below.

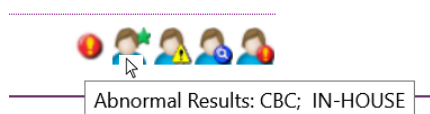





Additional demographic information is available by clicking the  **Patient Demographic** quick reference icon to the right of the main patient demographic information pictured above.

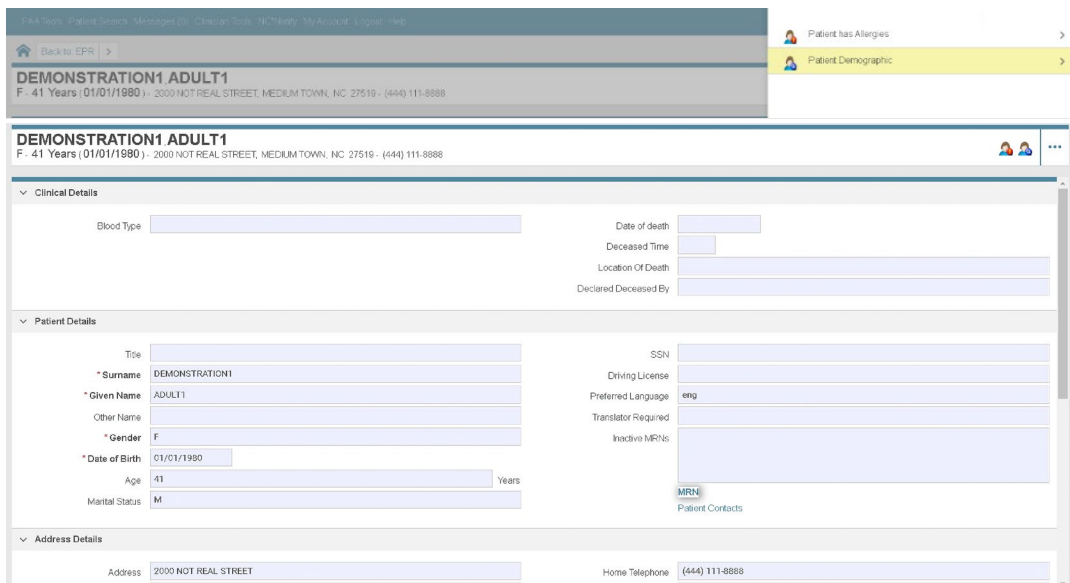
Quick Reference/Alert Icons

To the right of the main patient demographic information displayed on the **Patient View** screen, icons (as relevant) give you a quick visual flag for and one-click access to important clinical information. Hovering over each icon will also provide some information. Examples include the following:

-  **Abnormal Results:** hovering over this icon displays information on abnormal test results, as shown below.



- 
Alias Names Exist: clicking on this icon opens a pop-up window with information on any historical/alternative names for the patient—for example, maiden names—as shown below.
- 
Ongoing Patient Alerts: clicking on this icon opens a pop-up window with more information on any important ongoing patient alerts providers should know about, as shown below.
- 
Patient Demographic: clicking on this icon opens a pop-up window with additional options. When clicking on patient demographic information, another screen will display, as shown below.



DEMONSTRATION1 ADULT1
F, 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27516 - (444) 111-8888

DEMONSTRATION1 ADULT1
F, 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27516 - (444) 111-8888

Clinical Details


Blood Type: Date of death:
 Deceased Time:
 Location Of Death:
 Declared Deceased By:

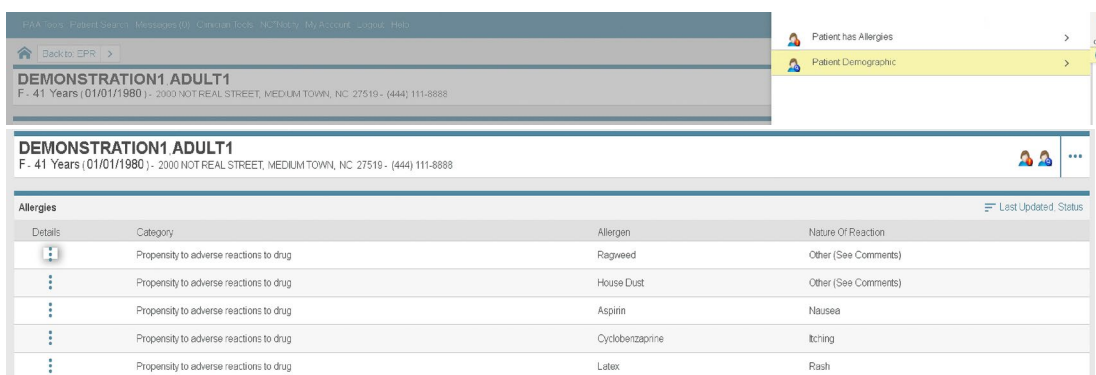
Patient Details

Title: SSN:
 * Surname: DEMONSTRATION1 Driving License:
 * Given Name: ADULT1 Preferred Language: eng
 Other Name: Translator Required:
 * Gender: F Inactive MRNs:
 * Date of Birth: 01/01/1980
 Age: 41 Years
 Marital Status: M MRN:
 Patient Contacts:

Address Details

Address: 2000 NOT REAL STREET Home Telephone: (444) 111-8888






- 
Patient has Allergies: clicking on this icon opens a pop-up window with information on allergies and adverse reactions, including date and source of this information, as shown below.



DEMONSTRATION1 ADULT1
F, 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27516 - (444) 111-8888

DEMONSTRATION1 ADULT1
F, 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27516 - (444) 111-8888

Allergies Last Updated: Status

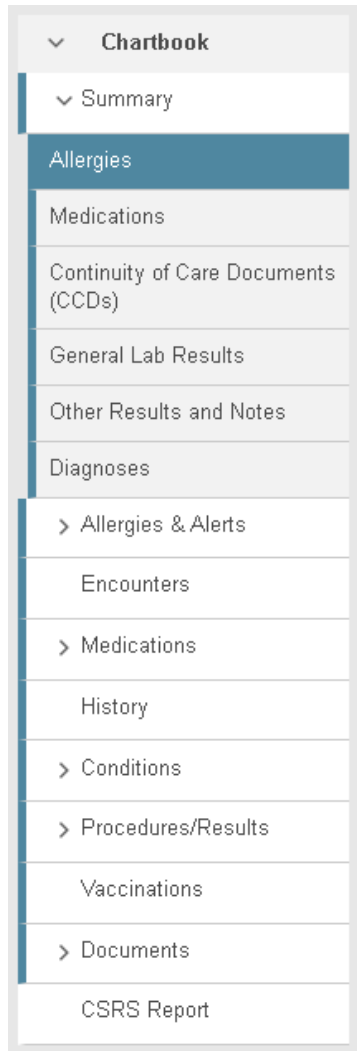
Details	Category	Allergen	Nature Of Reaction
	Propensity to adverse reactions to drug	Ragweed	Other (See Comments)
	Propensity to adverse reactions to drug	House Dust	Other (See Comments)
	Propensity to adverse reactions to drug	Aspirin	Nausea
	Propensity to adverse reactions to drug	Cyclobenzaprine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

*****Note:** These icons will only appear where relevant to the patient. For example, the *Patient has Allergies* icon will not display for a patient with no documented allergies.

Clinical Information

Below the main patient demographic information and quick reference/alert icons displayed on the **Patient View** screen, a patient record is presented in the following ways, navigable by tabs on the left side of the screen and icons within each screen. (See the [Clinical Portal User Interface](#) section of this user guide for a description of icon/button functions).

To arrive at the **Patient View** screen, navigate through the eleven clinical tabs shown below. A patient's **Chartbook** is the top tab that includes the following:



- Summary:** The second tab from the top is the default when opening a patient's clinical record. The **Summary** screen includes a single, aggregated record that lists the most recent information received for an individual patient by the HIE. This information is categorized into the following lists: **Allergies, Medications, Continuity of Care Documents (CCDs), General Lab Results, Other Results and Notes, and Diagnoses.**
- Allergies & Alerts:** The third tab from the top lists known patient allergens, nature of allergic reactions, severity level, onset date, status and data source/time. This screen shows important **Patient Alerts** for providers, such as the order "Do Not Resuscitate."
- Encounters:** The fourth tab from the top screen lists patient encounters in reverse chronological order (most recent first), including relevant dates, encounter type, facility name, relevant department and/or attending physician treating the patient, the local (treating facility) MRN and encounter number, and, if available, insurance information.
- Medications:** The fifth tab from the top screen presents two lists of medications: **Recent Medications** (no end date provided) and **Historical Medications** (end date provided). Each list contains the order name, dose, drug route, and start date for each medication, where that information was made available to NC HealthConnex.
- History:** The sixth tab from the top presents information on a patient's family, social, and medical history, including type of information (e.g., "family" may describe a family history of a certain condition, or "social" may describe smoking status), a description, onset date, comments, and source/time of the data.
- Conditions:** The seventh tab from the top presents three lists: **Diagnoses, Present Illness, and Past Illness.** The **Diagnoses** list contains patient diagnoses, including diagnosis type, description, code, status, diagnosis date, and source/time of the data. The **Present Illness** and **Past Illness** lists contain description, onset date, end date (if past illness), problem, status, and source/time of the data.
- Procedures/Results:** The eighth tab from the top presents three lists: **Procedures, General Lab Results, and Other Results and Notes.** The **Procedures** list has operation, procedure

date, care provider, operation code, and source/time of the data. The **General Lab Results** list contains order item, a link to a cumulative list of results for that order item, and individual results (a hyperlinked date/time that may be clicked for each full result information). The **Other Results and Notes** list contains description, status, results (a hyperlink that may be clicked for full result information), and results date.

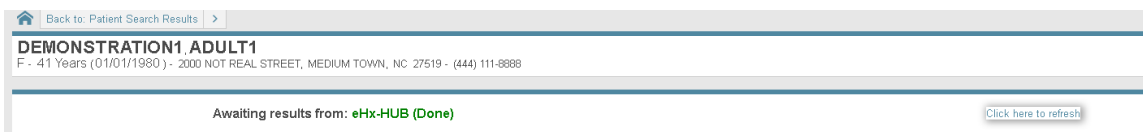
- **Vaccinations:** The ninth tab from the top presents a list of vaccinations administered, including the order name, dose, drug route, and start date.

****Note: Though NC HealthConnex shares information with the NC Immunization Registry, all vaccinations currently presented in the Clinical Portal are as received from EHR systems only.*

- **Documents:** The tenth tab from the top presents any documents received by NC HealthConnex, including the document name (a hyperlink that may be clicked to view document details or the full document, depending on document type), clinician, document type, activity date, and source/time of the data.
- **CSRS Report:** The eleventh tab from the top allows you to check the prescription fill history to meet the STOP Act Requirement while being in a patient record.

All the information in the clinical tabs described in this section has the following characteristics:

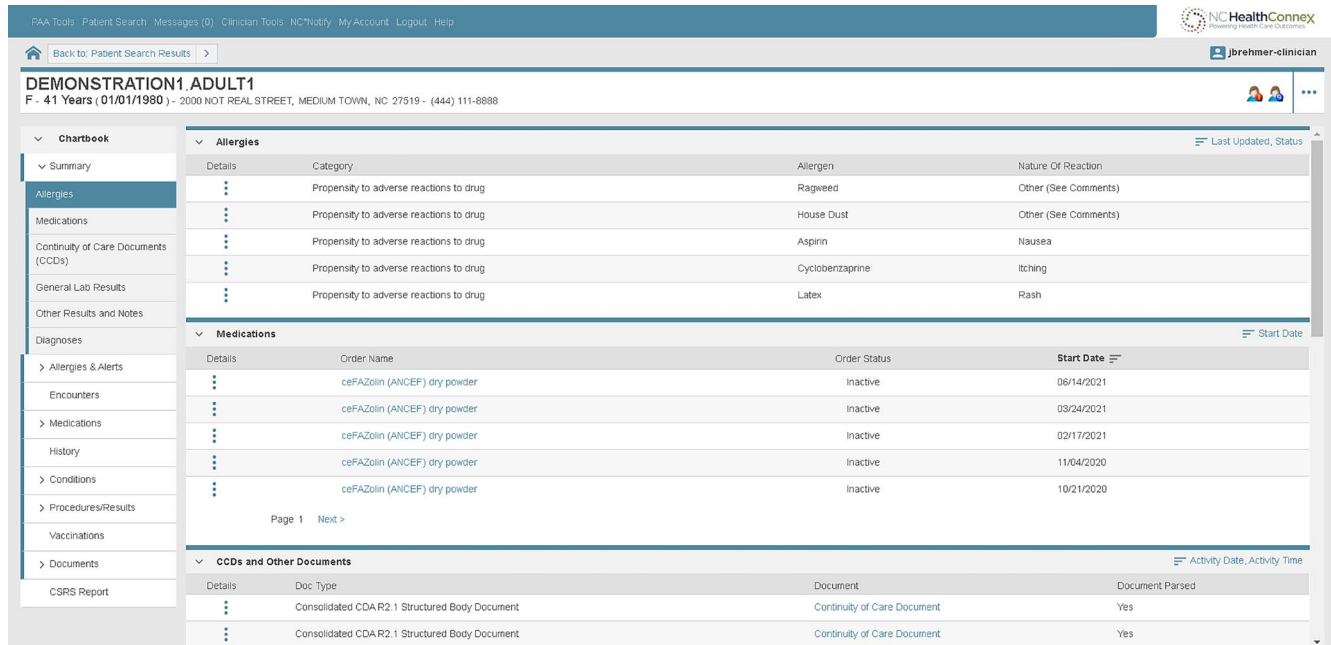
- It is presented in **reverse chronological order**, with the most recently received data at the top of each list. The data lists are not subject to filter or search functionality, but you can sort it. In some cases, a secondary sort is an option.
- It is **view-only**. To send a patient record to another provider, see the Messaging section of this user guide. To download or print a patient record, see the Reports section of this user guide.
- It is presented **exactly as received from EHR systems**, meaning that some data fields may be blank or contain information displayed in a variety of different ways based on how it was formatted in the source system.
- It may **require a refresh** to present the most up-to-date information. If you see, “*Awaiting results from:*” text below the Patient View Menu, you should click the Refresh button, as shown below, to ensure the most recent data from all data sources is presented.



Summary

The **Summary** screen, shown below, displays a snapshot of the most recent components of a patient’s aggregated record. It is the first screen you see when a patient’s name is selected from the results of a search or a list, and displays six abbreviated lists of information: **Allergies, Medications, Continuity of Care Documents (CCDs), General Lab Results, Other Results and Notes, and Diagnoses**. (Full lists of information for each category may be found by navigating through the tabs at left or by clicking the arrows at the bottom of each list.)

Some of the fields within each section and information entry may be blank, as data is not always sent/received from the source system.

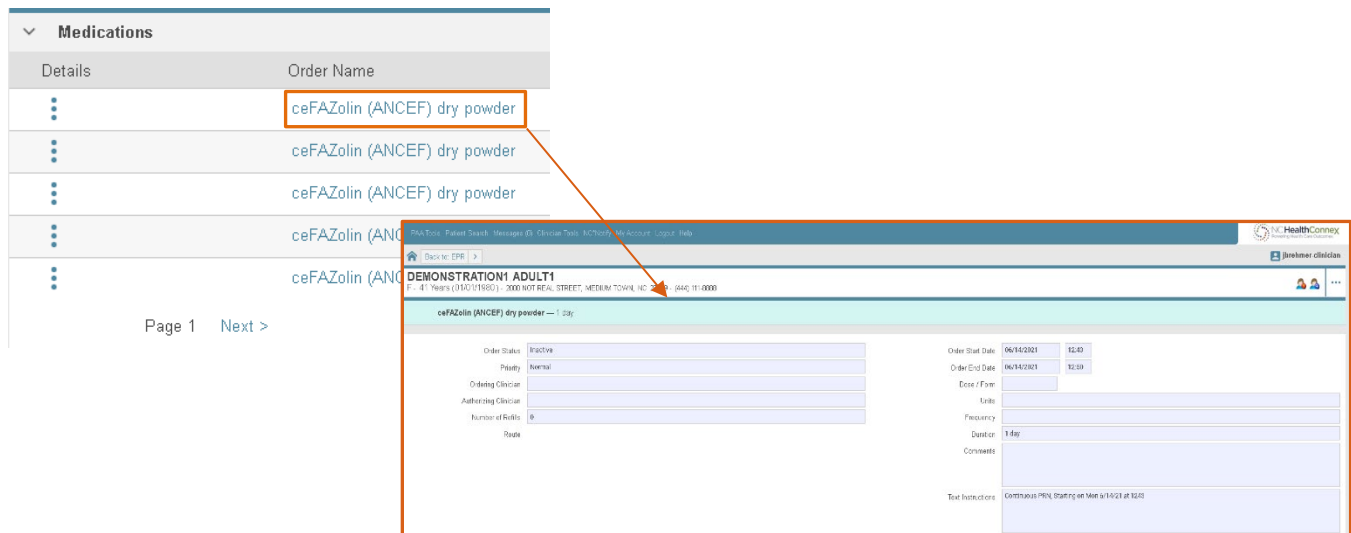


Details	Category	Allergen	Nature Of Reaction
⋮	Propensity to adverse reactions to drug	Ragweed	Other (See Comments)
⋮	Propensity to adverse reactions to drug	House Dust	Other (See Comments)
⋮	Propensity to adverse reactions to drug	Aspirin	Nausea
⋮	Propensity to adverse reactions to drug	Cyclobenzaprine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

Details	Order Name	Order Status	Start Date
⋮	ceFAZolin (ANCEF) dry powder	Inactive	06/14/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	03/24/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	02/17/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	11/04/2020
⋮	ceFAZolin (ANCEF) dry powder	Inactive	10/21/2020

Details	Doc Type	Document	Document Parsed
⋮	Consolidated CDAR2.1 Structured Body Document	Continuity of Care Document	Yes
⋮	Consolidated CDAR2.1 Structured Body Document	Continuity of Care Document	Yes

Data inputs that appear as blue hyperlinks—such as medication detail, document or lab result—may be clicked to open a new window with additional information, as shown below.



Details	Order Name
⋮	ceFAZolin (ANCEF) dry powder
⋮	ceFAZolin (ANCEF) dry powder
⋮	ceFAZolin (ANCEF) dry powder
⋮	ceFAZolin (ANCEF) dry powder
⋮	ceFAZolin (ANCEF) dry powder

Page 1 Next >

ceFAZolin (ANCEF) dry powder — 1 day	
Order Status	Inactive
Priority	Normal
Ordering Clinician	
Authorizing Clinician	
Number of Refills	0
Route	
Order Start Date	06/14/2021 12:40
Order End Date	06/14/2021 12:50
Dose / Form	
Units	
Frequency	
Duration	1 day
Comments	
Test Instructions	Continuous PEN, Starting on Wed 6/14/21 at 12:45

Additional information on a row of data on the **Summary** screen may be accessed by clicking on a **blue vertical ellipsis icon** ⋮ at the left of the row or a **paging icon** Page 1 Next > at the bottom of the row, where available. The information will appear in a new pop-up screen.

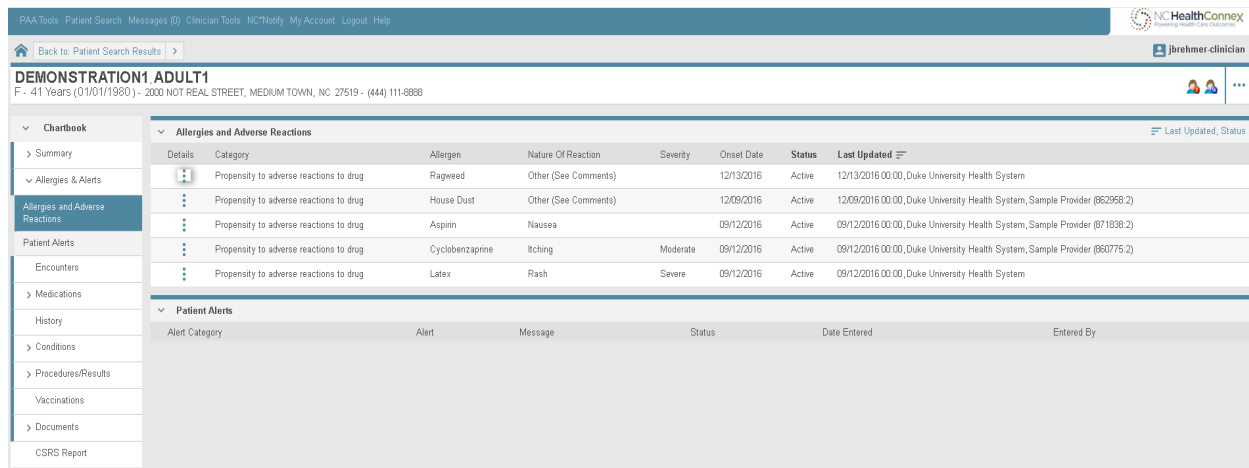
Allergies and Alerts

The **Allergies & Alerts** screen lists the patient’s recorded allergies and any important patient alerts. Some of these fields may be blank, as data is not always sent/received from the source system. This screen includes the following two sections:

The **Allergies and Adverse Reactions** list includes any documented allergen, the nature of the patient’s reaction following contact with the allergenic substance or event, the severity level, the recorded date of onset, the status, and the date/time/facility/sender of the update, where that information was made available to NC HealthConnex, for each allergy.

- The **Patient Alerts** list includes important alerts for providers, such as the direction “*Do Not Resuscitate.*” This list includes the type of alert, the alert message, the status, the date the alert was entered, and the facility/sender of the information for each alert.


The **Allergies & Alerts** screen is shown below.




The screenshot displays the 'Allergies and Alerts' section for a patient. The 'Allergies and Adverse Reactions' table is as follows:

Details	Category	Allergen	Nature Of Reaction	Severity	Onset Date	Status	Last Updated
	Propensity to adverse reactions to drug	Ragweed	Other (See Comments)		12/13/2016	Active	12/13/2016 00:00, Duke University Health System
	Propensity to adverse reactions to drug	House Dust	Other (See Comments)		12/09/2016	Active	12/09/2016 00:00, Duke University Health System, Sample Provider (852958.2)
	Propensity to adverse reactions to drug	Aspirin	Nausea		09/12/2016	Active	09/12/2016 00:00, Duke University Health System, Sample Provider (871838.2)
	Propensity to adverse reactions to drug	Cyclobenzaprine	Itching	Moderate	09/12/2016	Active	09/12/2016 00:00, Duke University Health System, Sample Provider (880775.2)
	Propensity to adverse reactions to drug	Latex	Rash	Severe	09/12/2016	Active	09/12/2016 00:00, Duke University Health System

Below the table is the 'Patient Alerts' section, which is currently empty.

To view additional information about an entry on the **Allergies and Adverse Reactions** list (such as a provider’s comments), click on the **blue vertical ellipsis icon**  at the left of the row and a pop-up window will appear, as shown below.



The 'Allergy Details' pop-up window contains the following information:

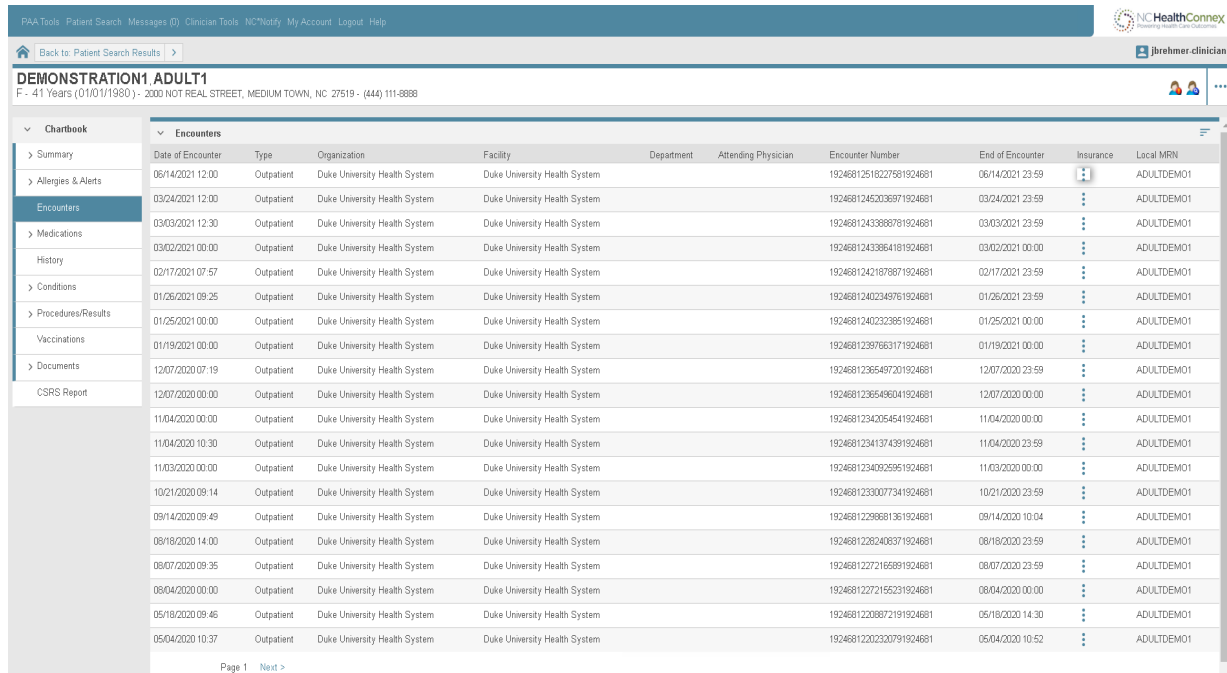
- Status: Active
- Category: Propensity to adverse reactions to drug
- Allergen: Ragweed
- Free Text Allergy: (Empty field)
- Comments: Seasonal allergies
- Onset Date: 12/13/2016
- Nature of Reaction: Other (See Comments)
- Severity: (Empty field)
- Inactive:
- DS Report Flag:
- Last Update Hospital: Duke University Health System
- Last Update Date: 12/13/2016 00:00

Encounters

The **Encounters** screen displays a list of a patient's encounters with care providers. The list includes the date of the encounter, end dates, the type of encounter, the organization name, facility name, the relevant department and/or attending physician treating the patient (with contact information), the local (treating facility) MRN and encounter number, and insurance information for each encounter. Encounter information from NC HealthConnex participants will be displayed here, as will encounter information received from the Patient Centered Data Home (PCDH) Network. More details on PCDH will be provided in the section below titled "[Patient Information from Outside NC HealthConnex](#)".

Some of these fields may be blank, as data is not always sent/received from the source system.

The **Encounters** screen is shown below.



Date of Encounter	Type	Organization	Facility	Department	Attending Physician	Encounter Number	End of Encounter	Insurance	Local MRN
06/14/2021 12:00	Outpatient	Duke University Health System	Duke University Health System			19246812518227581924681	06/14/2021 23:59	⋮	ADULTDEMO1
03/24/2021 12:00	Outpatient	Duke University Health System	Duke University Health System			19246812452036971924681	03/24/2021 23:59	⋮	ADULTDEMO1
03/03/2021 12:30	Outpatient	Duke University Health System	Duke University Health System			19246812433868781924681	03/03/2021 23:59	⋮	ADULTDEMO1
03/02/2021 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812433864181924681	03/02/2021 00:00	⋮	ADULTDEMO1
02/17/2021 07:57	Outpatient	Duke University Health System	Duke University Health System			19246812421678871924681	02/17/2021 23:59	⋮	ADULTDEMO1
01/26/2021 09:25	Outpatient	Duke University Health System	Duke University Health System			19246812402349761924681	01/26/2021 23:59	⋮	ADULTDEMO1
01/25/2021 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812402328651924681	01/25/2021 00:00	⋮	ADULTDEMO1
01/19/2021 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812397663171924681	01/19/2021 00:00	⋮	ADULTDEMO1
12/07/2020 07:19	Outpatient	Duke University Health System	Duke University Health System			19246812365497201924681	12/07/2020 23:59	⋮	ADULTDEMO1
12/07/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812365496041924681	12/07/2020 00:00	⋮	ADULTDEMO1
11/04/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812342054541924681	11/04/2020 00:00	⋮	ADULTDEMO1
11/04/2020 10:30	Outpatient	Duke University Health System	Duke University Health System			19246812341374391924681	11/04/2020 23:59	⋮	ADULTDEMO1
11/03/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812340925951924681	11/03/2020 00:00	⋮	ADULTDEMO1
10/21/2020 09:14	Outpatient	Duke University Health System	Duke University Health System			19246812330077341924681	10/21/2020 23:59	⋮	ADULTDEMO1
09/14/2020 09:49	Outpatient	Duke University Health System	Duke University Health System			19246812298681361924681	09/14/2020 10:04	⋮	ADULTDEMO1
08/18/2020 14:00	Outpatient	Duke University Health System	Duke University Health System			19246812262408371924681	08/18/2020 23:59	⋮	ADULTDEMO1
08/07/2020 09:35	Outpatient	Duke University Health System	Duke University Health System			19246812272165891924681	08/07/2020 23:59	⋮	ADULTDEMO1
08/04/2020 00:00	Outpatient	Duke University Health System	Duke University Health System			19246812272155231924681	08/04/2020 00:00	⋮	ADULTDEMO1
05/18/2020 09:46	Outpatient	Duke University Health System	Duke University Health System			19246812208872191924681	05/18/2020 14:30	⋮	ADULTDEMO1
05/04/2020 10:37	Outpatient	Duke University Health System	Duke University Health System			19246812202320791924681	05/04/2020 10:52	⋮	ADULTDEMO1

*****Note:** Attending Physician information is typically only sent to NC HealthConnex for emergency and inpatient events for ease of follow-up by a patient's care team.

Insurance information, if made available to, may be accessed by clicking on the **blue vertical ellipsis icon**. A new window containing insurance plan and account details will appear, as shown below.



HealthFund Code	HealthFund	HealthFund Plan	Card Number	Expires	Cardholder Name

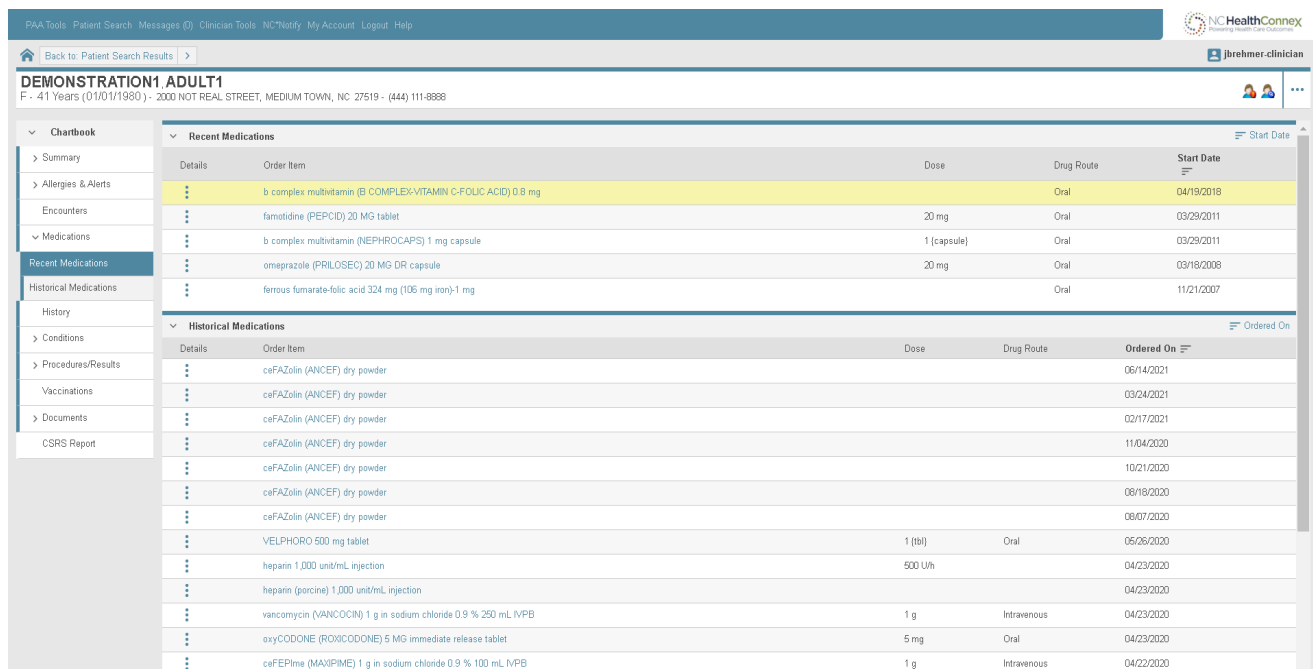
Medications

The Medications screen lists recent and historical medications prescribed for the patient. This screen includes the following sections:

- The **Recent Medications** list contains the order name, the prescribed dose, the drug route, and start date, where that information was made available to NC HealthConnex, for each medication.
- The **Historical Medications** list contains the order name, the prescribed dose, the drug route, and “ordered on” date, where that information was made available to NC HealthConnex, for each medication.

Some of these fields may be blank, as data is not always sent/received from the source system.

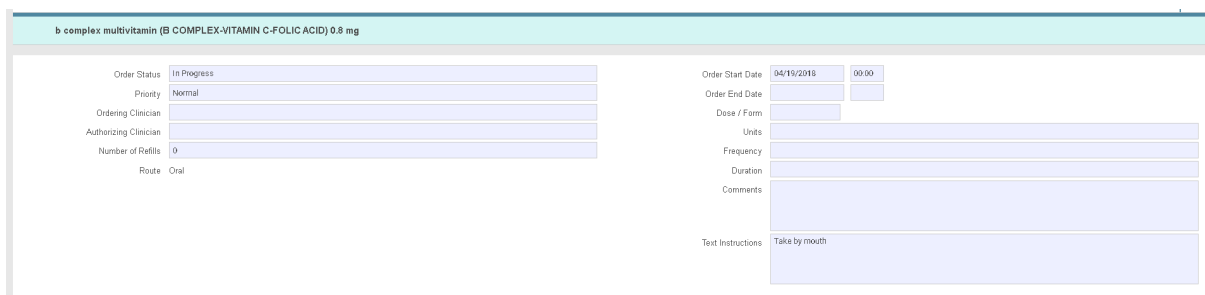
The **Medications** screen is shown below.



Recent Medications						Start Date
Details	Order Item	Dose	Drug Route		Start Date	
⋮	b complex multivitamin (B COMPLEX-VITAMIN C-FOLIC ACID) 0.8 mg		Oral		04/19/2018	
⋮	famotidine (PEPCID) 20 MG tablet	20 mg	Oral		03/29/2011	
⋮	b complex multivitamin (NEPHROCAPS) 1 mg capsule	1 (capsule)	Oral		03/29/2011	
⋮	omeprazole (PRILLOSEC) 20 MG DR capsule	20 mg	Oral		03/19/2008	
⋮	ferrous fumarate-folic acid 324 mg (106 mg iron)-1 mg		Oral		11/21/2007	

Historical Medications						Ordered On
Details	Order Item	Dose	Drug Route		Ordered On	
⋮	ceFAZolin (ANCEF) dry powder				06/14/2021	
⋮	ceFAZolin (ANCEF) dry powder				03/24/2021	
⋮	ceFAZolin (ANCEF) dry powder				02/17/2021	
⋮	ceFAZolin (ANCEF) dry powder				11/04/2020	
⋮	ceFAZolin (ANCEF) dry powder				10/21/2020	
⋮	ceFAZolin (ANCEF) dry powder				08/19/2020	
⋮	ceFAZolin (ANCEF) dry powder				08/07/2020	
⋮	VELPHORO 500 mg tablet	1 (tbl)	Oral		05/26/2020	
⋮	heparin 1,000 unit/mL injection	500 U/h			04/23/2020	
⋮	heparin (porcine) 1,000 unit/mL injection				04/23/2020	
⋮	vancocin (VANCOICIN) 1 g in sodium chloride 0.9 % 250 mL IVPB	1 g	Intravenous		04/23/2020	
⋮	oxyCODONE (ROXICODONE) 5 MG immediate release tablet	5 mg	Oral		04/23/2020	
⋮	ceFEtime (MAXPIME) 1 g in sodium chloride 0.9 % 100 mL IVPB	1 g	Intravenous		04/22/2020	

Additional details for each medication prescription—such as order status, ordering clinician or number of refills, if made available to NC HealthConnex—may be accessed by clicking on the **blue vertical ellipsis icon**. A new window containing the information will appear, as shown below.



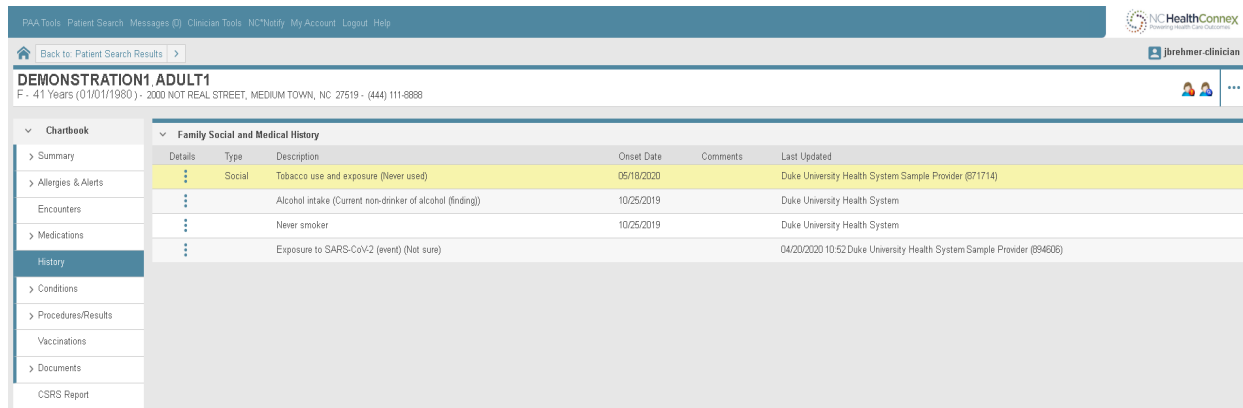
Order Status	In Progress	Order Start Date	04/19/2018 00:00
Priority	Normal	Order End Date	
Ordering Clinician		Dose / Form	
Authorizing Clinician		Units	
Number of Refills	0	Frequency	
Route	Oral	Duration	
		Comments	
		Text Instructions	Take by mouth

History


The **History** screen presents information on a patient’s family, social and medical history. This list includes the type of information (e.g., “family” may describe a family history of a certain condition, or “social” may describe smoking status), the description, the onset date, any comments, and the date/time/facility/sender of the update, where that information was made available to NC HealthConnex, for each entry.

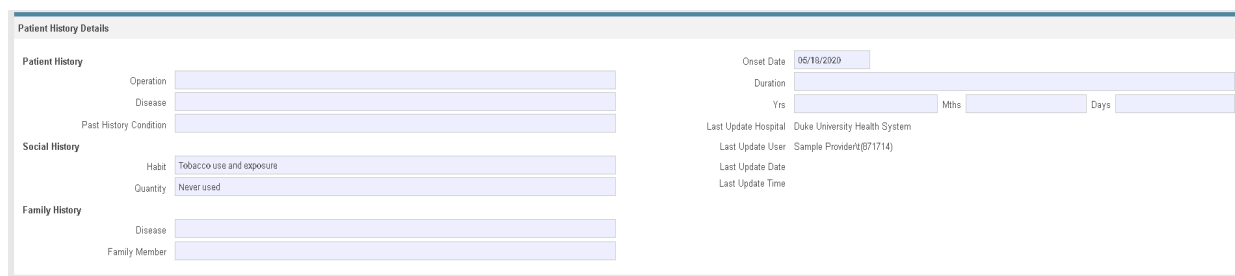
Some of these fields may be blank, as data is not always sent/received from the source system.

The **History** screen is shown below.



Details	Type	Description	Onset Date	Comments	Last Updated
⋮	Social	Tobacco use and exposure (Never used)	05/18/2020		Duke University Health System Sample Provider (871714)
⋮		Alcohol intake (Current non-drinker of alcohol (finding))	10/25/2019		Duke University Health System
⋮		Never smoker	10/25/2019		Duke University Health System
⋮		Exposure to SARS-CoV-2 (event) (Not sure)			04/20/2020 10:52 Duke University Health System Sample Provider (894506)

Additional details for each history entry—such as the family member who carries the family history of a condition or the duration of an issue/condition, if made available to NC HealthConnex—may be accessed by clicking on the **blue vertical ellipsis icon**.  A new window containing the information will appear, as shown below.



Patient History Details

Patient History

Operation:

Disease:

Past History Condition:

Social History

Habit:

Quantity:

Family History

Disease:

Family Member:

Onset Date:

Duration:

Yrs: Mths: Days:

Last Update Hospital: Duke University Health System

Last Update User: Sample Provider(871714)

Last Update Date:

Last Update Time:

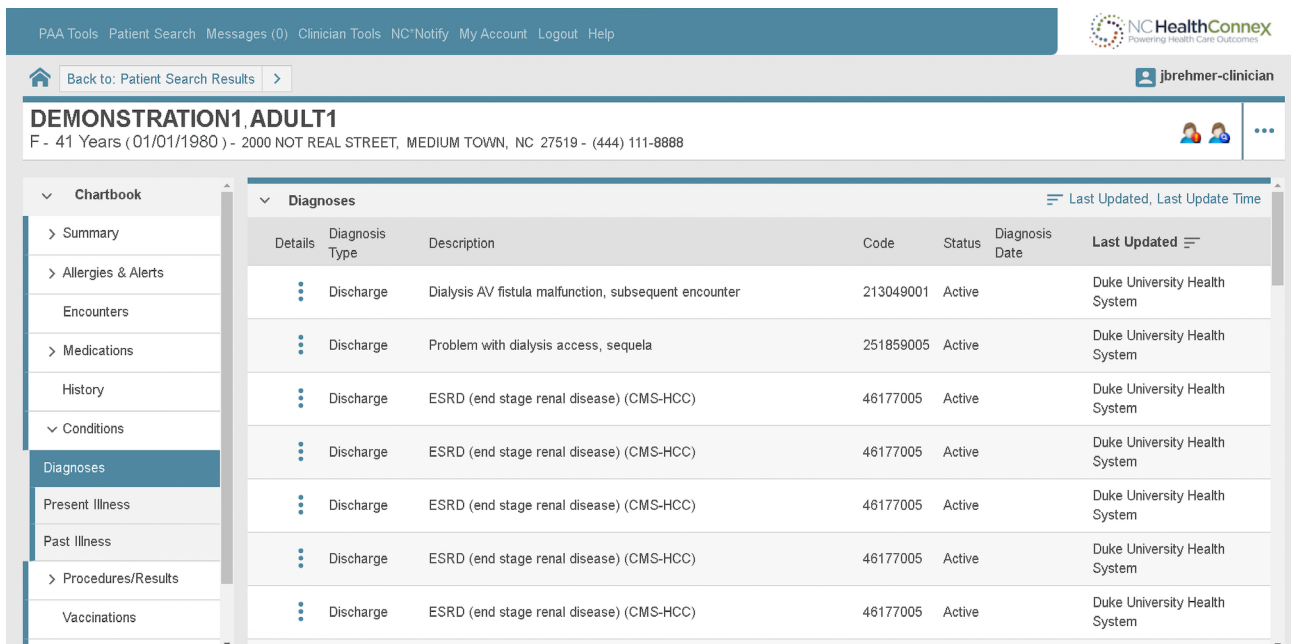
Conditions

The **Conditions** screen provides information on a patient’s diagnoses and any present and past illnesses. This screen includes the following sections:

- The **Diagnoses** list contains patient diagnoses, including the diagnosis type, the description, the code, the status, the diagnosis date, and the date/time/facility/sender of the update, where that information was made available to NC HealthConnex, for each diagnosis.
- The **Present Illness** and **Past Illness** list entries contain the description, the onset date, the end date (if past illness), the problem, the status, and the date/time/facility/sender of the update, where that information was made available to NC HealthConnex, for each illness.

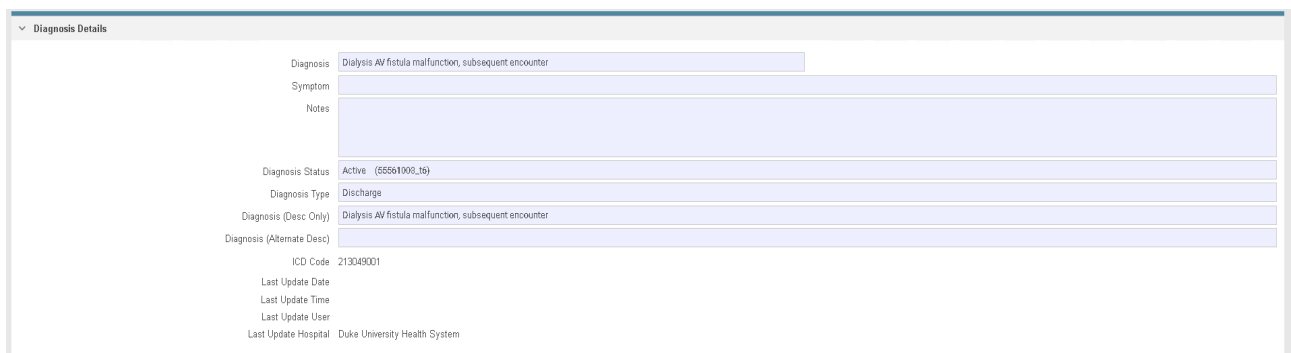
Some of these fields may be blank, as data is not always sent/received from the source system.

The **Conditions** screen is shown below.



Details	Diagnosis Type	Description	Code	Status	Diagnosis Date	Last Updated
⋮	Discharge	Dialysis AV fistula malfunction, subsequent encounter	213049001	Active		Duke University Health System
⋮	Discharge	Problem with dialysis access, sequela	251859005	Active		Duke University Health System
⋮	Discharge	ESRD (end stage renal disease) (CMS-HCC)	46177005	Active		Duke University Health System
⋮	Discharge	ESRD (end stage renal disease) (CMS-HCC)	46177005	Active		Duke University Health System
⋮	Discharge	ESRD (end stage renal disease) (CMS-HCC)	46177005	Active		Duke University Health System
⋮	Discharge	ESRD (end stage renal disease) (CMS-HCC)	46177005	Active		Duke University Health System
⋮	Discharge	ESRD (end stage renal disease) (CMS-HCC)	46177005	Active		Duke University Health System

Additional details for each diagnosis (e.g., notes) may be accessed by clicking on the **blue vertical ellipsis icon**. ⋮ A new window containing the information will appear, as shown below.



Diagnosis Details

Diagnosis: Dialysis AV fistula malfunction, subsequent encounter

Symptom: [Blank]

Notes: [Blank]

Diagnosis Status: Active (65561008,16)

Diagnosis Type: Discharge

Diagnosis (Desc Only): Dialysis AV fistula malfunction, subsequent encounter

Diagnosis (Alternate Desc): [Blank]

ICD Code: 213049001

Last Update Date: [Blank]

Last Update Time: [Blank]

Last Update User: [Blank]

Last Update Hospital: Duke University Health System

Procedures and Results

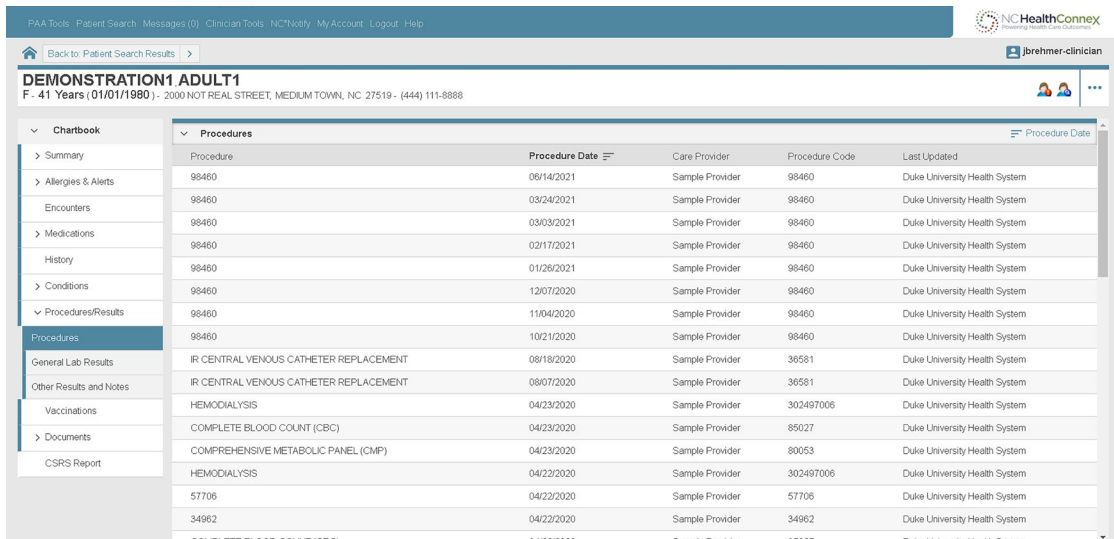
The **Procedures/Results** screen provides information on a patient's procedures, general lab results and other types of results and notes. This screen includes the following sections:

- The **Procedures** list contains the procedure, the procedure date, the care provider, the operation code, and the date/time/facility/sender of the update, where that information was made available to NC HealthConnex, for each procedure.
- The **General Lab Results** list contains the order item, a link to a cumulative list of results for that order item, and any individual result(s) (hyperlinked date(s)/time(s) that may be clicked for each full result information along with the performing location name or acronym) for each lab result.
- The **Other Results and Notes** list contains information for other types of results (e.g., pathology or radiology) or related provider notes. This list includes the description, the status, the results (a hyperlink that may be clicked for full result information), and the results date for each entry.

For quick reference, any **red text** that appears within the Procedures/Results screens and pop-up windows indicates a result or test item that is abnormal or outside of normal range (e.g., a result lower or higher than the provided reference range).

Some of these fields may be blank, as data is not always sent/received from the source system.

The **Procedures/Results** screen is shown below.



Procedure	Procedure Date	Care Provider	Procedure Code	Last Updated
98460	06/14/2021	Sample Provider	98460	Duke University Health System
98460	03/24/2021	Sample Provider	98460	Duke University Health System
98460	03/03/2021	Sample Provider	98460	Duke University Health System
98460	02/17/2021	Sample Provider	98460	Duke University Health System
98460	01/26/2021	Sample Provider	98460	Duke University Health System
98460	12/07/2020	Sample Provider	98460	Duke University Health System
98460	11/04/2020	Sample Provider	98460	Duke University Health System
98460	10/21/2020	Sample Provider	98460	Duke University Health System
IR CENTRAL VENOUS CATHETER REPLACEMENT	08/18/2020	Sample Provider	36581	Duke University Health System
IR CENTRAL VENOUS CATHETER REPLACEMENT	08/07/2020	Sample Provider	36581	Duke University Health System
HEMODIALYSIS	04/23/2020	Sample Provider	302497006	Duke University Health System
COMPLETE BLOOD COUNT (CBC)	04/23/2020	Sample Provider	85027	Duke University Health System
COMPREHENSIVE METABOLIC PANEL (CMP)	04/23/2020	Sample Provider	80053	Duke University Health System
HEMODIALYSIS	04/22/2020	Sample Provider	302497006	Duke University Health System
57706	04/22/2020	Sample Provider	57706	Duke University Health System
34962	04/22/2020	Sample Provider	34962	Duke University Health System
COMPLETE BLOOD COUNT (CBC)	04/22/2020	Sample Provider	85027	Duke University Health System

General Lab Results										
Order Item	Cumulative	Result 1	Result 2	Result 3	Result 4	Result 5	Result 6	Result 7	Result 8	Result 9
Complete Blood Count (CBC)	View	04/23/2020 05:36 Duke University Health System F	04/22/2020 05:10 Duke University Health System F	04/21/2020 07:28 Duke University Health System F	04/20/2020 12:30 Duke University Health System F	02/25/2020 07:49 Duke University Health System F	01/30/2020 11:32 Duke University Health System F	01/29/2020 18:49 Duke University Health System F	01/28/2020 11:10 Duke University Health System F	01/28/2020 08:35 Duke University Health System F
Comprehensive Metabolic Panel (CMP)	View	04/23/2020 05:36 Duke University Health System F	04/22/2020 05:10 Duke University Health System F	04/20/2020 12:30 Duke University Health System F	01/04/2020 11:43 Duke University Health System F	09/09/2019 10:10 Duke University Health System F				
POC Glucose Whole Blood		04/22/2020 05:26 Duke University Health System F								

Red text indicates a result or test item that is abnormal or outside of normal range.

General Lab Results may be viewed cumulatively or individually.

To view side-by-side cumulative results for a lab results order item, click the blue **View** hyperlink in the **Cumulative** column and a pop-up window will appear, as shown below. This window will display rows of individual test items, each of which include a reference range, units of measure, and columns of results from different dates/times, as noted.

A **C** icon represents a **Corrected** result, and an **F** icon represents a **Final** result. Hovering over an individual result will show the result, reference range and unit description for quick reference, as shown below. This pop-up window will display row(s) of individual test items for the result, each of which include a flag (e.g., Normal, Low, High), a lab value, units of measure, a reference range, a lab value status (**Corrected** or **Final**), and any comments, sensitivities, or message flags. As with the cumulative view, a **C** icon represents a **Corrected** result, and an icon represents a **F** Final result.

Cumulative:

Laboratory Results - Cumulative View														
Test Items	RefRange	Units	Specimens	541937FC-0064-11EB-A007-000056466B13116902 T138111 04/23/2020 05:36	54188203-D064-11EB-A007-000056466B13116902 T138111 04/23/2020 05:36	54183C30-D064-11EB-A007-000056466B1311610 T138111 04/22/2020 05:36	54175716-D064-11EB-A007-000056466B13116902 T138111 04/22/2020 05:10	54169F92-D064-11EB-A007-000056466B13116902 T138111 04/22/2020 05:10	5415EADAE-D064-11EB-A007-000056466B13116902 T138111 04/21/2020 07:28	541593AC-D064-11EB-A007-000056466B131100012 T138111 04/21/2020 07:19	5415225C-D064-11EB-A007-000056466B1311A90900 T138111 04/20/2020 13:08	5414F1EC-D064-11EB-A007-000056466B1311074 T138111 04/20/2020 12:39	54140A5C-D064-11EB-A007-000056466B13116902 T138111 04/20/2020 12:39	541352EC-D064-11EB-A007-000056466B13116902 T138111 04/20/2020 12:39
Results narrative would be documented here	3.2 - 9.8x10?? 9/L				4.8 F			5.6 F	3.9 F					3.6 F
Hemoglobin	12 - 15.5	g/dL			8.7 F			9.1 F	9.3 F					10.1 F
Hematocrit	35 - 45	%			29.5 F			30.6 F	30.2 F					33.4 F
Platelets	150 - 450x10?? 9/L				136 F			169 F	193 F					194 F
MCV (Mean Corpuscular Volume)	80 - 98	fL			93 F			94 F	93 F					93 F
MCH (Mean Corpuscular Hemoglobin)	28.5 - 34	pg			27.4 F			27.8 F	28.6 F					28.1 F
MCHC (Mean Corpuscular Hemoglobin Concentration)	31.4 - 36	%			29.5 F			29.7 F	30.8 F					30.2 F
RBC (Red Blood Cell Count)	3.77 - 5.16x10?? 12/L				3.17 F			3.27 F	3.25 F					3.60 F

Additionally, any individual result from the cumulative results window may be viewed in more detail by clicking the individual result value hyperlink in the desired date/time result column. This will open a new pop-up window, as shown below. For quick reference, note that any **red block** that appears next to a test item name indicates the test item is abnormal or outside of normal range.


Individual:

Results Detail									
Complete Blood Count (CBC)					Order Start Date & Time 04/23/2020 05:36 Ordering Clinician Specimen Collection Date & Time 00:00 Specimen Received Date & Time 00:00 Order Code 1698				
					Result Date & Time 04/23/2020 06:09 Result Status Final Lab Number 54188208-0064-11EB-AD07-0060956466B13 Last Updated At Duke University Health System Age at Time of Test 40 Years				
Test Item	Flag	Value	Units	Reference Range	Test Item Status	Comments	Sensitivities	Message Flag	
Results narrative would be documented here									
Hemoglobin	Low	8.7	g/dL	12 - 15.5	Final			Low	
Hematocrit	Low	29.5	%	36 - 45	Final			Low	
Platelets		136		150 - 450x10 ³ /L	Final			Low	
MCV (Mean Corpuscular Volume)	Normal	93	fL	80 - 98	Final				
MCH (Mean Corpuscular Hemoglobin)	Normal	27.4	pg	26.5 - 34	Final				
MCHC (Mean Corpuscular Hemoglobin Concentration)	Low	29.5	%	31.4 - 36	Final			Low	
RBC (Red Blood Cell Count)		3.17		3.77 - 5.16x10 ¹² /L	Final			Low	
RDW-CV (Red Cell Distribution Width)	High	18.6	%	11.5 - 14.6	Final			High	
NRBC (Nucleated Red Blood Cell Count)		0.00		0x10 ⁷ /L	Final				
NRBC % (Nucleated Red Blood Cell %)		0.0	%		Final				
MPV (Mean Platelet Volume)	Normal	10.1	fL	7.2 - 11.7	Final				
Lab Interpretation	Abnormal								

*****Note:** Each test item is itself a hyperlink that may be clicked to open a pop-up window including additional notes or other information, as shown below.

To view individual results for a lab results order item, click the hyperlinked **Test Item** and a new pop-up window will appear, as shown below.

Test Item Details	
Episode Organization	Duke University Health System
Test Item Code	71B-7
Test Item	Hemoglobin
Value	8.7
Reference Range	12 - 15.5
Units	g/dL
Test Item Status	Final
Comments	

In the **Other Results and Notes** table, below **General Lab Results**, additional details for each entry in the table (e.g., ordering clinician, notes, etc.) may be accessed by clicking on the **blue vertical ellipsis icon**  in that row within the Details column or the **Results** blue hyperlink in that row within the Results column. A new window containing the information will appear, as shown below.

PAA Tools Patient Search Messages (0) Clinician Tools NC*Notify My Account Logout Help

Back to Patient Search Results >

DEMONSTRATION1 ADULT1
F - 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27519 - (444) 111-8888

jbrehrer-clinician

Chartbook		Other Results and Notes				
		Details	Description	Status	Results	Result Date
> Summary	⋮		IR central venous catheter replacement	Final	Results	
> Allergies & Alerts	⋮		IR central venous catheter replacement	Final	Results	
Encounters	⋮		IR central venous catheter replacement	Final	Results	
> Medications	⋮		IR central venous catheter replacement	Final	Results	
History	⋮		IR central venous catheter replacement	Final	Results	
> Conditions	⋮		IR central venous catheter replacement	Final	Results	
Procedures/Results	⋮		IR central venous catheter replacement	Final	Results	
Procedures	⋮		IR central venous catheter replacement	Final	Results	
General Lab Results	⋮		IR central venous catheter replacement	Final	Results	
Other Results and Notes	⋮		IR central venous catheter replacement	Final	Results	
Vaccinations	⋮		IR central venous catheter replacement	Final	Results	
> Documents	⋮		IR central venous catheter placement	Final	Results	
CSRS Report	⋮		US regional anesthesia images	Final	Results	
	⋮		IR central venous catheter replacement	Final	Results	
	⋮		X-ray fluoro less than 1 hour	Final	Results	
	⋮		US regional anesthesia images	Final	Results	
	⋮		IR central venous catheter replacement	Final	Results	
	⋮		IR dialysis fistulagram	Final	Results	
	⋮		IR central venous catheter replacement	Final	Results	
	⋮		IR central venous catheter placement	Final	Results	

Page 1 Next >

IR central venous catheter replacement

Specimen Collection Date & Time
Ordering Clinician

[Order Details](#)

Date Created
Result Status Final
Filler Number FASESEC2-D063-11EB-AD07-005056A66B13
Last Updated At Duke University Health System
Age at Time of Test 41 Years

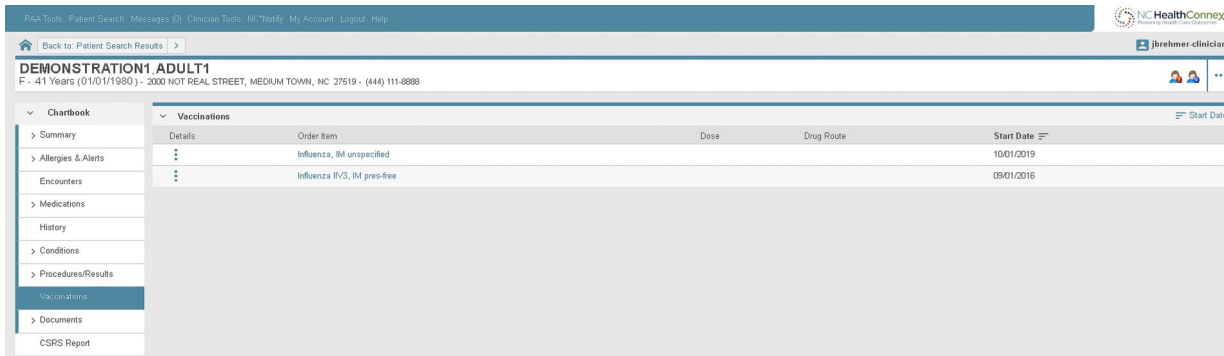
Results narrative would be documented hereResults narrative would be documented here

Vaccinations

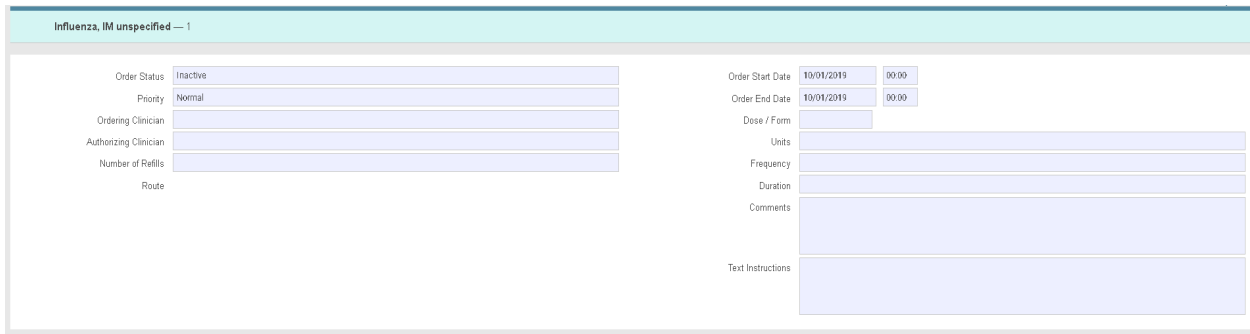
The **Vaccinations** screen provides information on a patient's documented vaccinations, including the order name, dose, drug route and start date.

Some of these fields may be blank, as data is not always sent/received from the source system.

The **Vaccinations** screen is shown below.



Additional details for each vaccination (e.g., ordering clinician or any comments or instructions) may be accessed by clicking on the **blue vertical ellipsis icon** next to an entry. A new window containing the information will appear, as shown below.



*****Note:** Though NC HealthConnex shares information with the NC Immunization Registry, all vaccinations currently presented in the Clinical Portal are as received from EHR systems only.

Documents

The **Documents** screen allows you to view information on C-CDA (Consolidated Clinical Document Architecture) documents received by NC HealthConnex, including a hyperlink that may be clicked to view document details or the full document itself (depending on the document type), the clinician, the document type, the activity date, and the date/time/facility/sender of the document, where that information was made available to NC HealthConnex.

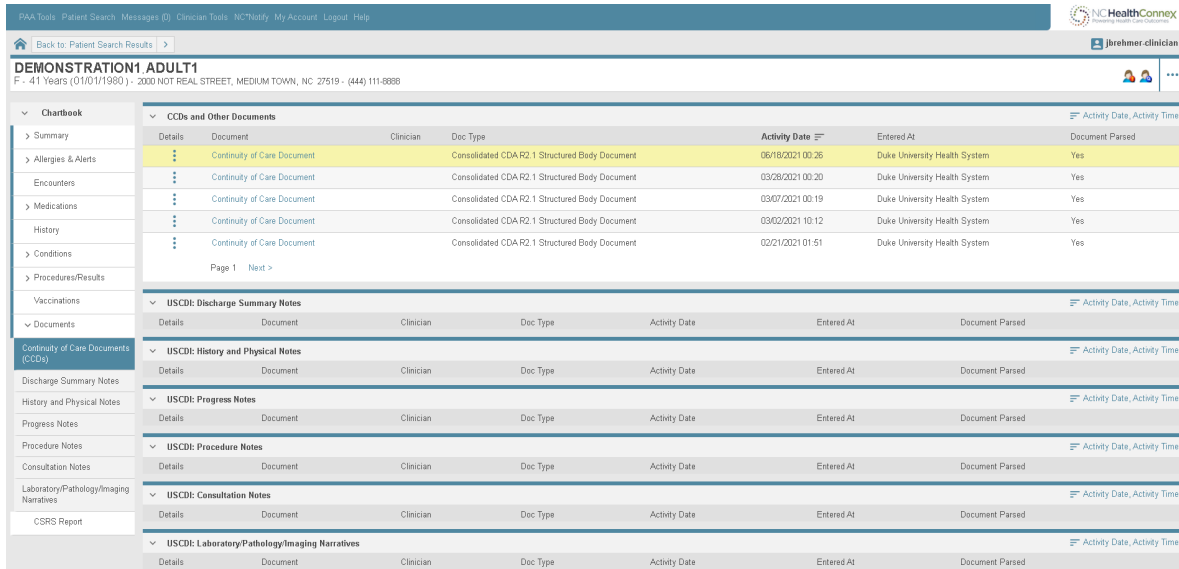
USCDI (United States Core Data for Interoperability) version 1 **Clinical Notes** are now available in the clinical portal within the **Documents** section when they are sent by the source. Some of these fields may be blank, as data is not always sent/received from the source system.

The **USCDI Clinical Notes** section will include:

- Consultation Notes
- Discharge Summary Notes
- History and Physical Notes or Narratives

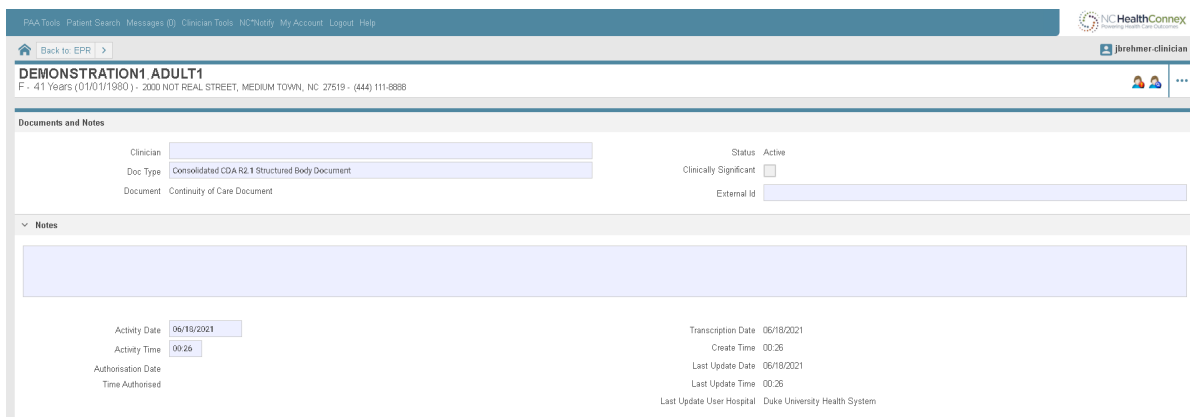
- Procedure Notes
- Progress Notes
- Laboratory Report Narratives
- Pathology Report Narratives
- Imaging Narratives

The **Documents** screen is shown below.



Details	Document	Clinician	Doc Type	Activity Date	Entered At	Document Parsed
⋮	Continuity of Care Document		Consolidated CDA R2.1 Structured Body Document	06/18/2021 09:26	Duke University Health System	Yes
⋮	Continuity of Care Document		Consolidated CDA R2.1 Structured Body Document	03/28/2021 09:20	Duke University Health System	Yes
⋮	Continuity of Care Document		Consolidated CDA R2.1 Structured Body Document	03/07/2021 09:19	Duke University Health System	Yes
⋮	Continuity of Care Document		Consolidated CDA R2.1 Structured Body Document	03/02/2021 10:12	Duke University Health System	Yes
⋮	Continuity of Care Document		Consolidated CDA R2.1 Structured Body Document	02/21/2021 01:51	Duke University Health System	Yes

Additional details for each document (e.g., notes) may be accessed by clicking on the **blue vertical ellipsis icon** next to the document name. A new window will appear containing the information, as shown below.



Documents and Notes

Clinician: [Redacted]
 Doc Type: Consolidated CDA R2.1 Structured Body Document
 Document: Continuity of Care Document

Status: Active
 Clinically Significant:
 External Id: [Redacted]

Notes

Activity Date: 06/18/2021
 Activity Time: 09:26


Transcription Date: 06/18/2021
 Create Time: 09:26
 Last Update Date: 06/19/2021
 Last Update Time: 09:26
 Last Update User: Hospital Duke University Health System

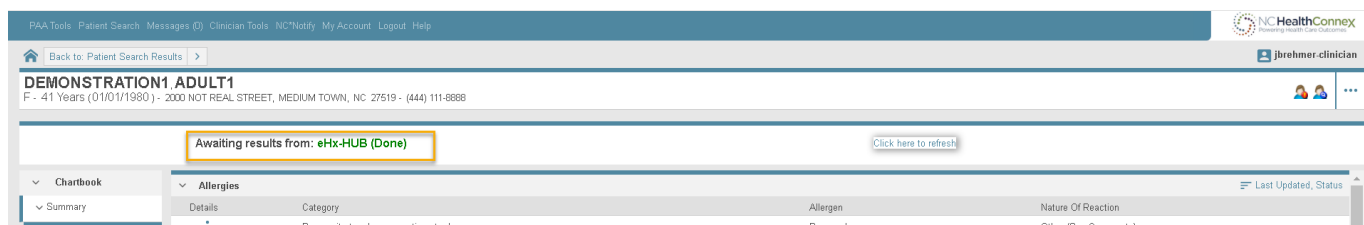
Patient Information from Outside NC HealthConnex

NC HealthConnex is a proud member of the nationwide eHealth Exchange network. Active in all 50 states, the eHealth Exchange is the largest query-based, health information network in the country. It is the principal network that connects federal agencies and non-federal organizations, allowing them to work together to improve patient care and public health.

Through eHealth Exchange, NC HealthConnex automatically queries external systems for available patient records when a patient is searched in the Clinical Portal:

- Atrium Health CareConnect HIE (Charlotte, NC) **
- Carolina eHealth Network (South Carolina)**
- eTHIN (East Tennessee) *
- FloridaHIE
- GaHIN (Georgia's state-designated HIE) *
- GracHIE (Georgia Regional Academic Community Health Information Exchange)
- MedVirginia (Richmond, VA) *
- OCHIN (Portland, OR) **
- PULSE (Patient Unified Lookup System for Emergencies) from Ai **
- VADoD (Veterans Health Administration and Department of Defense Joint HIE) **
- Vidant Health

Any results from these and other connected systems through eHealth Exchange will be returned and stored as documents in the **Documents** tab, and identifiable as such by viewing the facility information (displayed within a row in the **Facility** column, or by clicking on the **blue vertical ellipsis icon**  for more details). When searching a patient, you may see a temporary message appear under the patient demographic row noting that the system is “*awaiting results from*” external systems, as shown below.



The screenshot shows the top navigation bar with links for PPA Tools, Patient Search, Messages (0), Clinician Tools, NC Notify, My Account, Logout, and Help. Below the navigation is a breadcrumb trail: Back to: Patient Search Results. The patient information section displays: DEMONSTRATION1 ADULT1, F - 41 Years (01/01/1980) - 2000 NOT REAL STREET, MEDIUM TOWN, NC 27519 - (444) 111-8888. A yellow box highlights a message: "Awaiting results from: eHx-HUB (Done)". A "Click here to refresh" button is visible next to the message. Below the message is a table with columns: Chartbook, Allergies, Details, Category, Allergen, Nature Of Reaction, and Last Updated, Status. The table content is partially obscured by a vertical ellipsis icon.

NC HealthConnex participates in the Patient Centered Data Home™ (PCDH), which is a secure health data exchange initiative with Civitas Networks for Health. This functionality serves to proactively send an alert when a patient has a health event away from home. Based on triggering episode alerts, the system proactively notifies NC HealthConnex that a care event has occurred outside of the patient’s “home” HIE. PCDH alerts consist of a push of information based on a patient’s home zip code. NC HealthConnex has loaded all 45 participating HIE’s zip codes into our system to capture out-of-state visits.

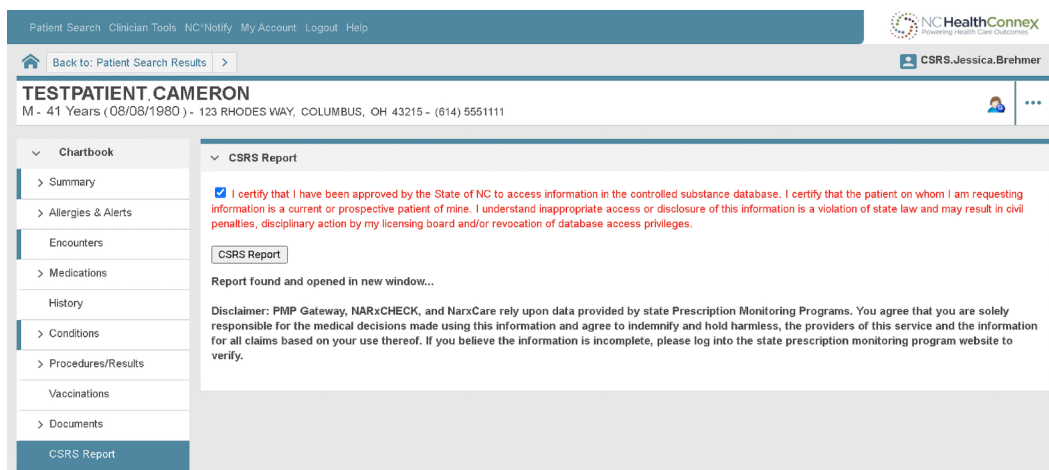
*****Note:** If a record for a patient doesn't already exist in NC HealthConnex, a search for that patient through our eHealth Exchange partners will not be successful. A patient must have at least one prior record contributed by an NC HealthConnex participating organization to return and display external information in the patient record.

CSRS (Controlled Substance Reporting System) Report

The **CSRS** button allows you to access CSRS reports within the clinical viewer. This feature helps providers meet the STOP Act Requirement.

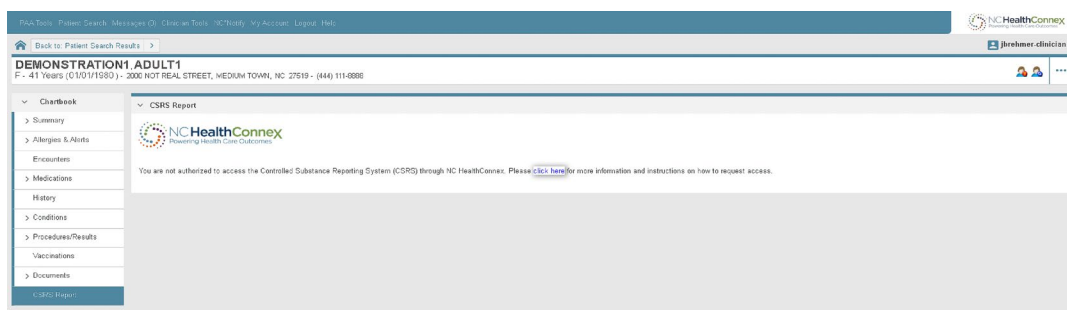
On clicking the **CSRS Report** tab, you will be presented with one of the following screens:

- **Access Granted:**



The screenshot shows the patient record for TESTPATIENT CAMERON. The CSRS Report section is active, displaying a consent checkbox that is checked. Below the checkbox is a 'CSRS Report' button. A message states 'Report found and opened in new window...'. A disclaimer at the bottom reads: 'Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.'

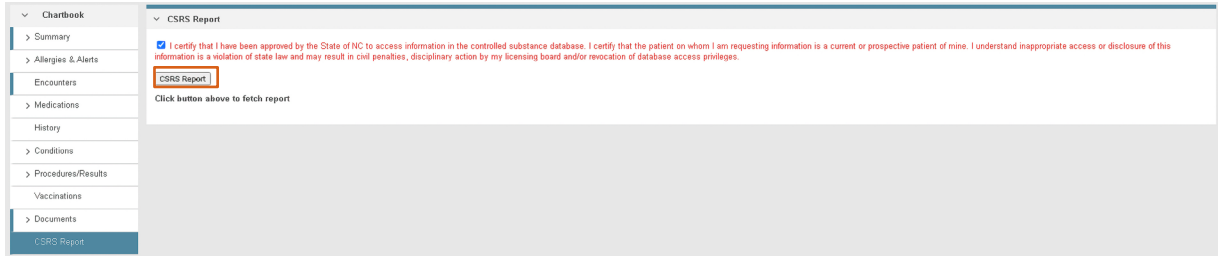
- **Access Denied:**



The screenshot shows the patient record for DEMONSTRATION1 ADULT1. The CSRS Report section is active, displaying a message: 'You are not authorized to access the Controlled Substance Reporting System (CSRS) through NC HealthConnex. Please [click here](#) for more information and instructions on how to request access.'

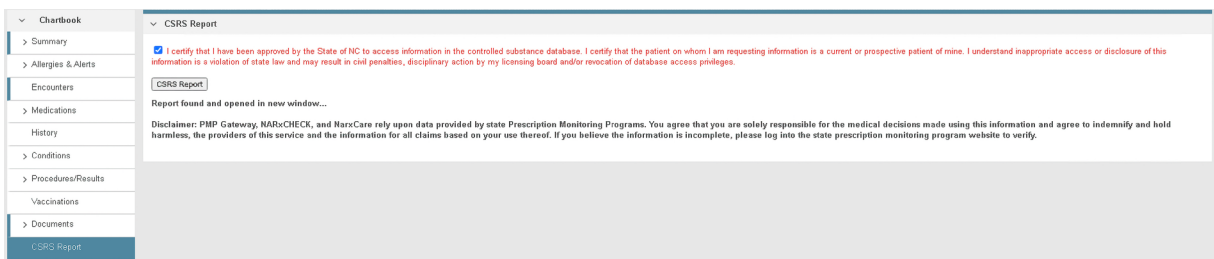
To initiate the process of retrieving a **CSRS Report**, you must:

- First confirm that you want to access the CSRS Report. This is done by checking the consent box, which will enable the CSRS Report button.
- You will then need to click the CSRS Report button to fetch the report for this patient.

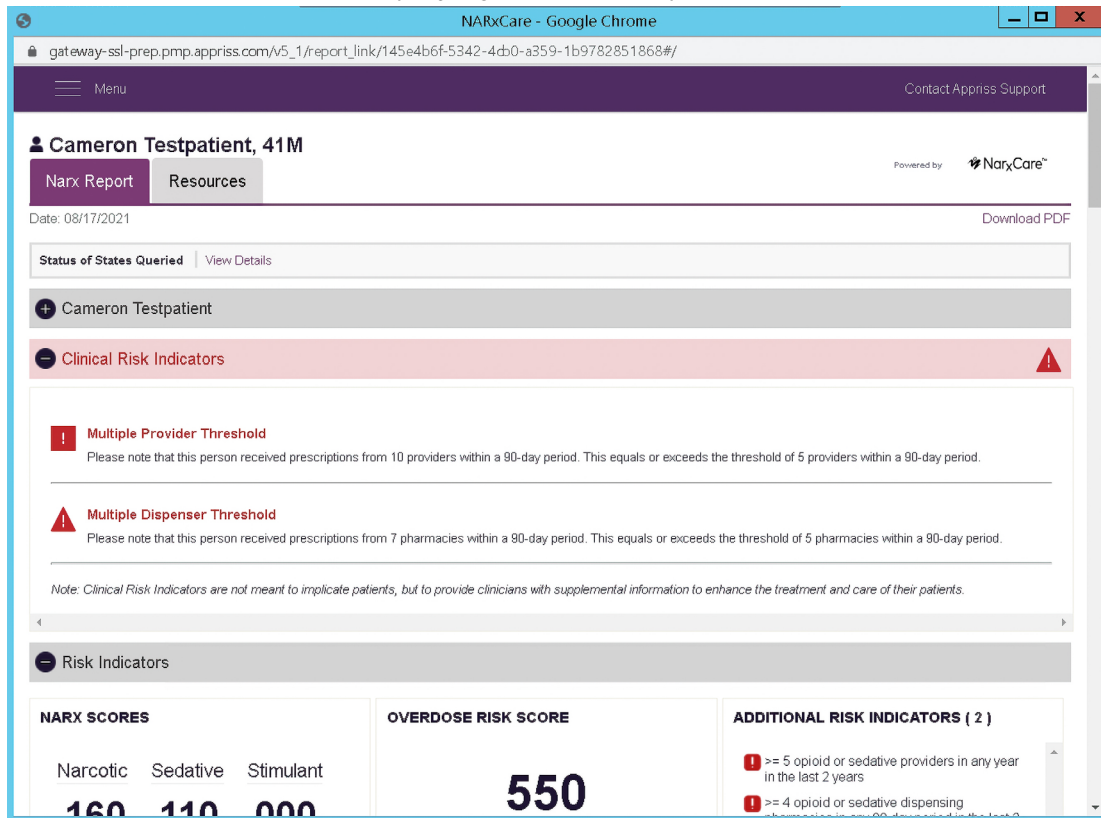


- If the CSRS Report search returns an error, it will display within the CSRS Report window. (See Appendix A for a list of errors)
- If the CSRS Report request prefetch was successful, retrieval of the CSRS Report will be initiated.
- If report retrieval returned an error in the response, it will display within the CSRS REPORT window. (See Appendix B)
- If report retrieval was successful, a message will display within the CSRS REPORT window stating “Report found and opened in new window.”
- Additionally, the disclaimer information from CSRS will be displayed:

Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.



- A new window will launch displaying the CSRS Report:



- If there is an error with the Report Link an error message will be displayed in the new window. (See Appendix C)
- To download the PDF report, click, **Download PDF** in the top right-hand corner. The download toolbar with document will display at the bottom of webpage.
- If you close the popup window, you may view the report again using the CSRS Report button. This will create a subsequent Report Request to CSRS.

*****Note:** Additional enrollment steps are required to access CSRS reports within the clinical viewer. Participant Account Administrators can request access for users at their organization.

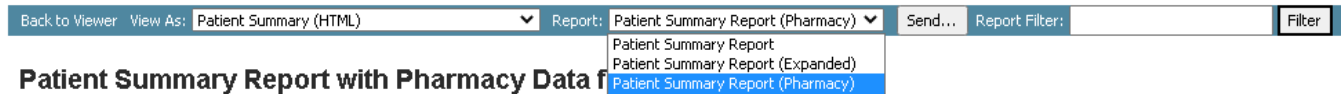
Report Types

There are three types of patient summary reports available for viewing, printing and sharing. These reports and their contents are as follows:



You may select the preferred type of report from the **Report** drop-down menu at the top of the screen, as shown below.

- **Patient Summary Report:** the default report upon clicking **View Summary**, this report shows patient demographics, allergies, medications, encounters, diagnoses and laboratory results.
- **Patient Summary Report (Expanded):** this report shows more information, including patient demographics, allergies, alerts, advance directives, patient-clinician relationships, program memberships, encounters, appointments, diagnoses, medications, immunizations, laboratory results, radiology results, observations, procedures, physical exams, problems, history, documents, and sections for additional information about people and organizations related to the patient.
- **Patient Summary Report (Pharmacy):** this report shows pharmacy claims dispense data.



Patient Summary Report with Pharmacy Data for Darth Vader

Patient Demographics

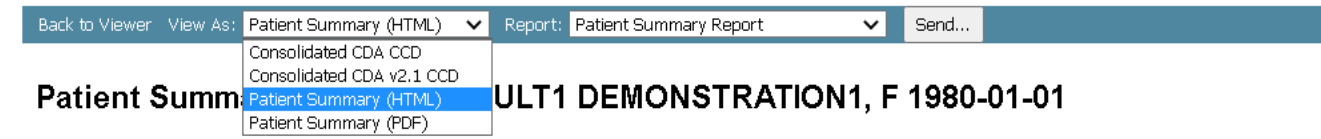
Name	Date Of Birth	Gender	Identification Number	Phone	Address
Darth Vader	1999-01-01	F	MRN: 3456356 MRN: M000001924 MRN: 799234MM MRN: 89118406 MRN: M000001593 MRN: 14252 MRN: 374104 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 MRN: 103709190 DL: 999837 LMRN: E00001481	910-999-1212	123 Darth Vader Ave Statesville NC 28625 123 Darth Vader Avenue Statesville NC 28625 123 Darth Vader Ave First Floor Statesville North Carolina 28625-7053 123 DARTH VADAR AVE STATESVILLE NC 28625 123 DARTH VADER AVE STATESVILLE NC 28625

Pharmacy Claims

Disp Date	Sending Org Name	Disp Pharm Name	Disp Pharm Phone	Presc Provider Name	Presc Provider Phone	Disp Code Desc	Disp Compound	Disp Strength	Disp Strength UOM	Disp Form Desc	Disp Dose Freq	Disp Refills Auth	Disp Refills #	Disp Qty	Disp Days Sup
2023-07-27	Mint Hill Pharmacy	Mint Hill Pharmacy	7049102718	Ricardo Souza-Leao Jr N.P.	123-456-0000	Losartan-Hydrochlorothiazide 100-25 Mg Tab	No	100 mg-25 mg	EA	Tablet	This would be how often, e.g every 4-6 hours	3	1	30	30
2023-07-27	Mint Hill Pharmacy	Mint Hill Pharmacy	7049102718	Ricardo Souza-Leao Jr N.P.		Tramadol Hcl 50 Mg Tablet	No	50 mg	EA	Tablet		0	2	17	8
2023-07-27	Mint Hill Pharmacy	Mint Hill Pharmacy	7049102718	Dr. Liliya Velet MD		Finasteride 5 Mg Tablet	No	5 mg	EA	Tablet		2	0	30	30

Report Formats

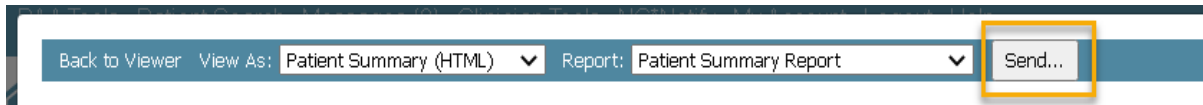
There are three report format options available to you: **Consolidated CDA CCD**, **Patient Summary (HTML)**, and **Patient Summary (PDF)**. You may select the preferred format from the **View As** drop-down menu at the top of the screen, as shown below.



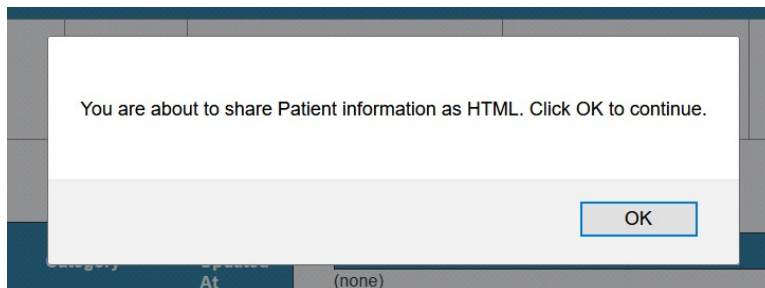
Sharing a Report

A key feature of the NC HealthConnex Clinical Portal is the ability for users to proactively share patient information with other members of a patient's care team. Please note that this feature is only available to those users who have a Direct Secure Messaging (DSM) address issued by NC HealthConnex and associated with their Clinical Portal account. To share a patient report with another health care provider with a Direct Secure Messaging mailbox, complete the following steps:

- Select the desired report type and format, per the instructions in the [Report Types](#) and [Report Formats](#) sections of this user guide, above. Then, click the **Send** button at the top of the screen, as shown below.



- A pop-up window will appear confirming you wish to share the patient information with another party. Click **OK** to continue.



- A new message pop-up window will appear. Fill in all applicable fields, and filter the report as desired, per the [Messaging](#) section of this user guide. Then click **Send** at the bottom left, as shown below.

Protecting Patient Health Information

Care must be taken to keep Protected Health Information (PHI) safe. Information downloaded to local systems or printed for office use may be accessed by unauthorized persons if care is not taken. This may happen if:

- The system is left in an insecure state; for example, you leave your computer unattended while logged into the Clinical Portal with a patient record or report open.
- A patient summary report is downloaded to a local system or printed for office use, and is not properly encrypted, stored or filed to prevent unauthorized access by others.

To ensure PHI is not accessed by an unauthorized user:

- Always log out of the Clinical Portal at the end of your session. To do so, select the Logout button in the menu bar at the top of the screen. This action closes all open windows, message drafts and attachments automatically.
- Always check that all windows and tabs are closed before stepping away from your computer, as attachments or drafts may be open in separate windows in your browser.
- Follow all security guidelines recommended by your system administrator.

Please download and print patient reports with caution and remember it is your responsibility to safeguard patient data per the Health Insurance Portability and Accountability Act (HIPAA) and your participation agreement with the NC Health Information Exchange Authority (NC HIEA).

CONTROLLED SUBSTANCE REPORTING SYSTEM (CSRS) REPORT

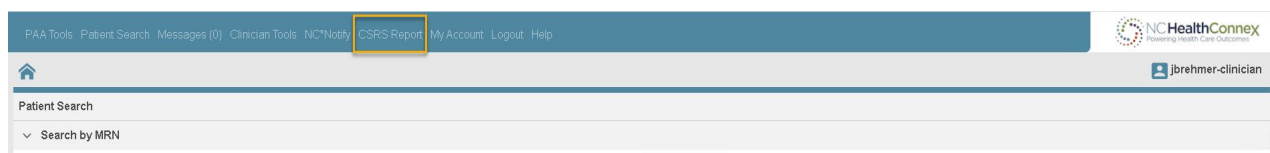
The CSRS menu button allows you to access CSRS reports within the clinical viewer. You will be able to access reports for patients that do not have a clinical record in NC HealthConnex as well as those that have opted out. The menu button can be used without being in a patient record. This feature helps providers meet the STOP Act Requirement.

Accessing Patients Without a Clinical Record

*****Note:** *Patients who have opted out of NC HealthConnex cannot opt out of CSRS pursuant to state law and can be searched through this method.*

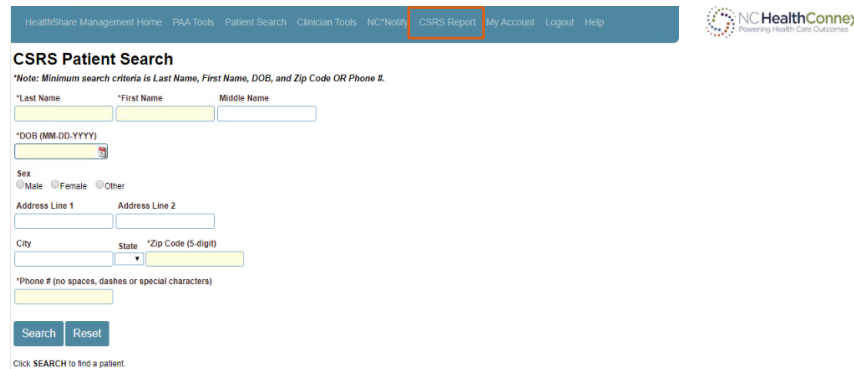
There may be instances in which you are searching for a patient that may not have clinical records stored in NC HealthConnex. In this situation, you may still access the CSRS report for that patient.

If you have a CSRS role, select the CSRS Report tab in the top menu.



You will be presented with one of the following screens:

- **Access Granted:**

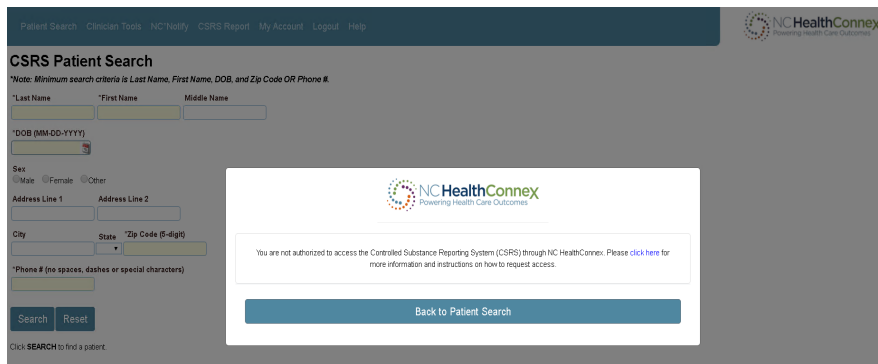


The screenshot shows the 'CSRS Patient Search' form. At the top, a navigation bar includes 'HealthShare Management Home', 'PAA Tools', 'Patient Search', 'Clinician Tools', 'NC Notify', 'CSRS Report' (highlighted with a red box), 'My Account', 'Logout', and 'Help'. The form fields include:

- *Last Name, *First Name, Middle Name
- *DOB (MM-DD-YYYY)
- Sex: Male, Female, Other
- Address Line 1, Address Line 2
- City, State, *Zip Code (5-digit)
- *Phone # (no spaces, dashes or special characters)

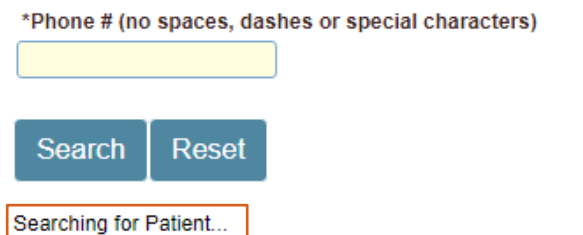
 Search and Reset buttons are at the bottom. A note states: 'Click SEARCH to find a patient.'

- **Access Denied:**



The screenshot shows the 'CSRS Patient Search' form with a modal message overlay. The message reads: 'You are not authorized to access the Controlled Substance Reporting System (CSRS) through NC HealthConnex. Please click here for more information and instructions on how to request access.' Below the message is a 'Back to Patient Search' button. The form fields and navigation bar are visible in the background but dimmed.

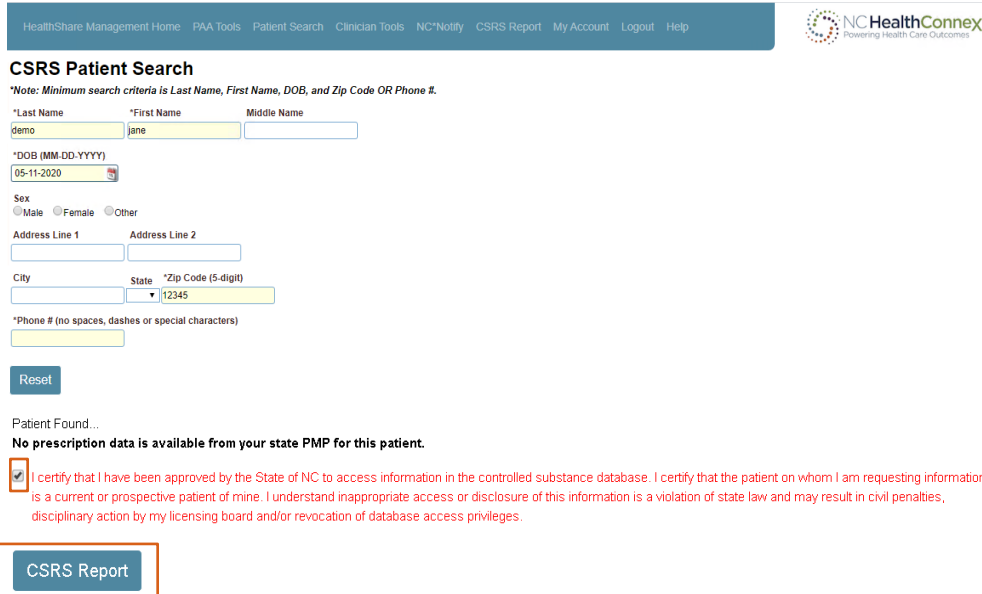
- You will fill out the form, entering at least the following (minimum required fields):
 - Last Name
 - First Name
 - Date of Birth
 - Zip Code or Phone #
- Click on the Search button.
- If minimum required fields are not populated, you will receive an error message. (See Appendix D).
- The CSRS screen will display a message *“Searching for patient...”*



This close-up shows the bottom portion of the search form. It includes the '*Phone # (no spaces, dashes or special characters)' field, the 'Search' and 'Reset' buttons, and a status message 'Searching for Patient..' enclosed in a red box.

- Once the patient search has completed, the response will be returned to the CSRS screen.

- If an error is returned, the Error Message will be displayed. (See Appendix A)
- Once a patient has been found, you can initiate the process of retrieving the CSRS report:
 - First confirm that you want to access the report from the CSRS. This is done by checking the consent box, which will enable the CSRS Report button.
 - Then, click the CSRS Report button.



HealthShare Management Home | FAA Tools | Patient Search | Clinician Tools | NC Notify | CSRS Report | My Account | Logout | Help

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name: demo | *First Name: jane | Middle Name:

*DOB (MM-DD-YYYY): 05-11-2020

Sex: Male Female Other

Address Line 1: | Address Line 2:

City: | State: | *Zip Code (5-digit): 12345

*Phone # (no spaces, dashes or special characters):

Patient Found...

No prescription data is available from your state PMP for this patient.

I certify that I have been approved by the State of NC to access information in the controlled substance database. I certify that the patient on whom I am requesting information is a current or prospective patient of mine. I understand inappropriate access or disclosure of this information is a violation of state law and may result in civil penalties, disciplinary action by my licensing board and/or revocation of database access privileges.

- The CSRS screen will display *“Fetching Report...”*
- If report retrieval returned an error in the response, it will display within the CSRS screen. (See Appendix B.)
- If report retrieval was successful, A message will display within the CSRS Report window stating: *“Report found and opened in new window.”*
- Additionally, the disclaimer information from the CSRS will be displayed:
Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.

*****Note:** *Pop-up blocker must be disabled.*

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name: *First Name: Middle Name:

*DOB (MM-DD-YYYY):

Sex: Male Female Other

Address Line 1: Address Line 2:

City: State: *Zip Code (5-digit):

*Phone # (no spaces, dashes or special characters):

Reset

Report found and opened in new window...

*DOB (MM-DD-YYYY):

Sex: Male Female Other

Address Line 1: Address Line 2:

City: State: *Zip Code (5-digit):

*Phone # (no spaces, dashes or special characters):

Reset

Patient Found:

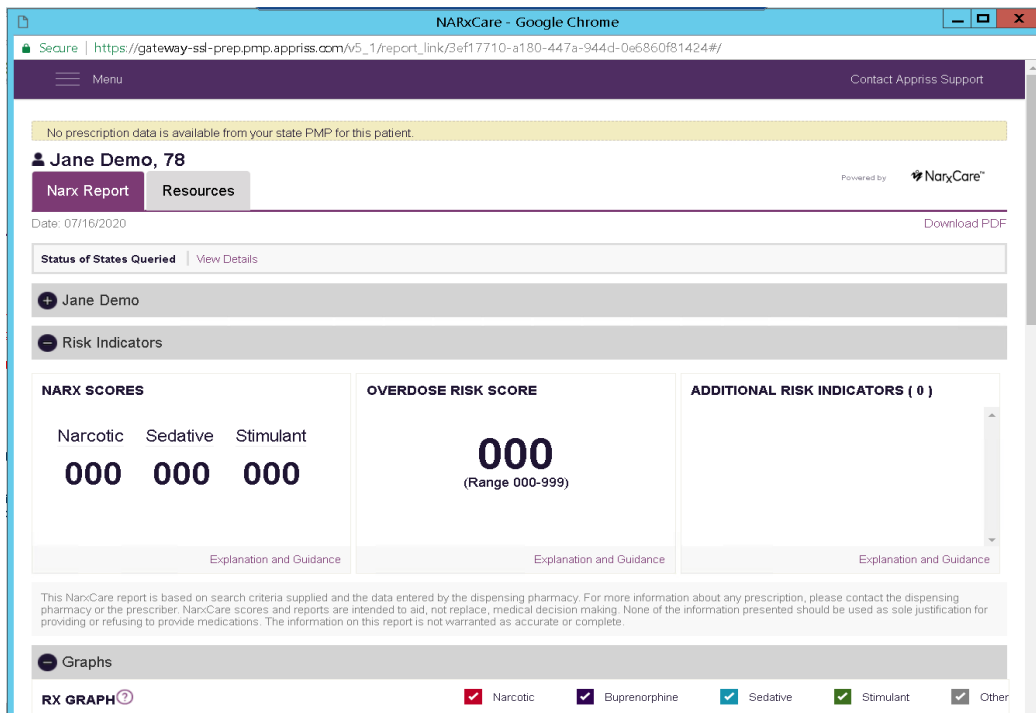
No prescription data is available from your state PMP for this patient.

I certify that I have been approved by the State to access information in the controlled substance abuse database. I certify that the patient on whom I am requesting information is a current or prospective patient of mine. I understand inappropriate access or disclosure of this information is a violation of state law and may result in civil penalties, disciplinary action by my licensing board and/or revocation of database access privileges.

CSRS Report

Disclaimer: PMP Gateway, NARx-CHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.

- A new window will launch displaying the CSRS Report:



NARxCare - Google Chrome

Secure | https://gateway-ssl-prep.pmp.appriss.com/v5_1/report_link/3ef17710-a180-447a-944d-0e6860f81424/#/

Menu | Contact Appriss Support

No prescription data is available from your state PMP for this patient.

Jane Demo, 78

Narx Report | Resources | Powered by NarxCare™

Date: 07/16/2020 | Download PDF

Status of States Queried | View Details

+ Jane Demo

- Risk Indicators

NARX SCORES			OVERDOSE RISK SCORE	ADDITIONAL RISK INDICATORS (0)
Narcotic	Sedative	Stimulant	000 (Range 000-999)	
000	000	000		
Explanation and Guidance			Explanation and Guidance	Explanation and Guidance

This NarxCare report is based on search criteria supplied and the data entered by the dispensing pharmacy. For more information about any prescription, please contact the dispensing pharmacy or the prescriber. NarxCare scores and reports are intended to aid, not replace, medical decision making. None of the information presented should be used as sole justification for providing or refusing to provide medications. The information on this report is not warranted as accurate or complete.

- Graphs

RX GRAPH

Narcotic Buprenorphine Sedative Stimulant Other

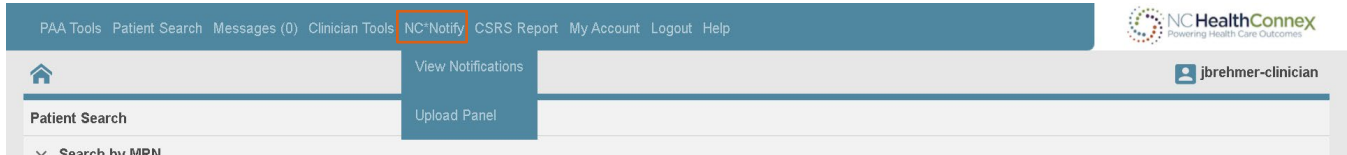
- If there is an error with the Report Link an error message will be displayed in the new window. (See Appendix C)
- To download the PDF report, click, **Download PDF** in the top right-hand corner. The download toolbar with document will display at the bottom of webpage.
- If you close the popup window, you may view the report again using the CSRS Document button. This will create a subsequent Report Request to CSRS.

****Note: Additional enrollment steps are required to access CSRS reports within the clinical viewer. Participant Account Administrators can request access for users at their organization.*

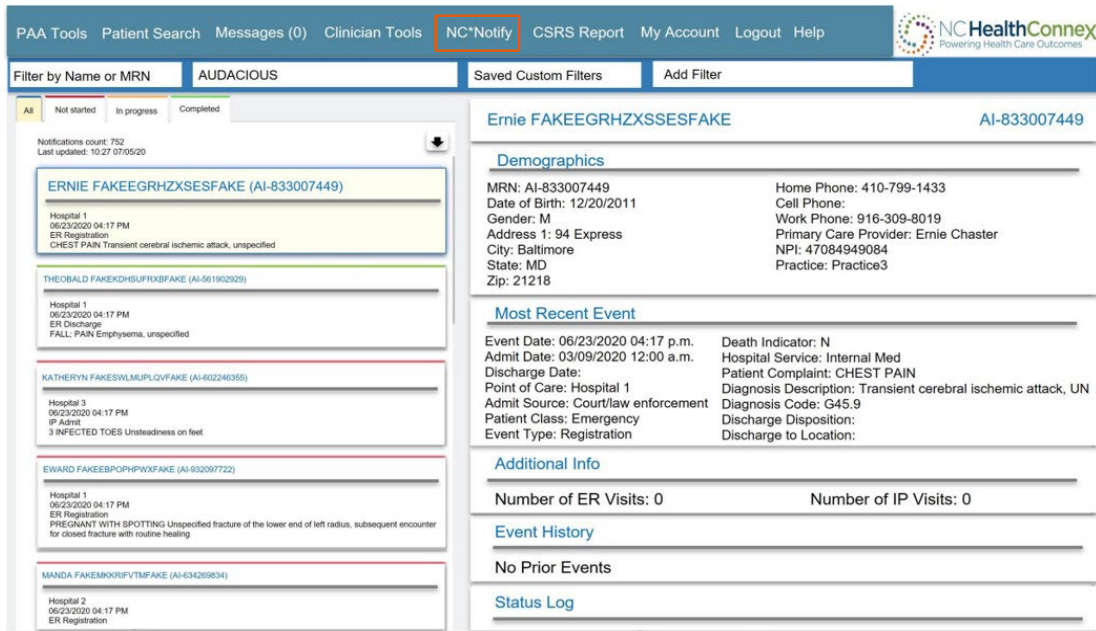
NC*NOTIFY

Within the NC HealthConnex portal, you will have access to the NC*Notify event notification and care coordination tool if you have subscribed to this service. This tool will provide participants with a dashboard-like view of patient activity through notifications.

If you have a NC*Notify role, select the NC*Notify tab in the top menu. You are presented with the following options, **View Notifications** or **Upload Panel**.



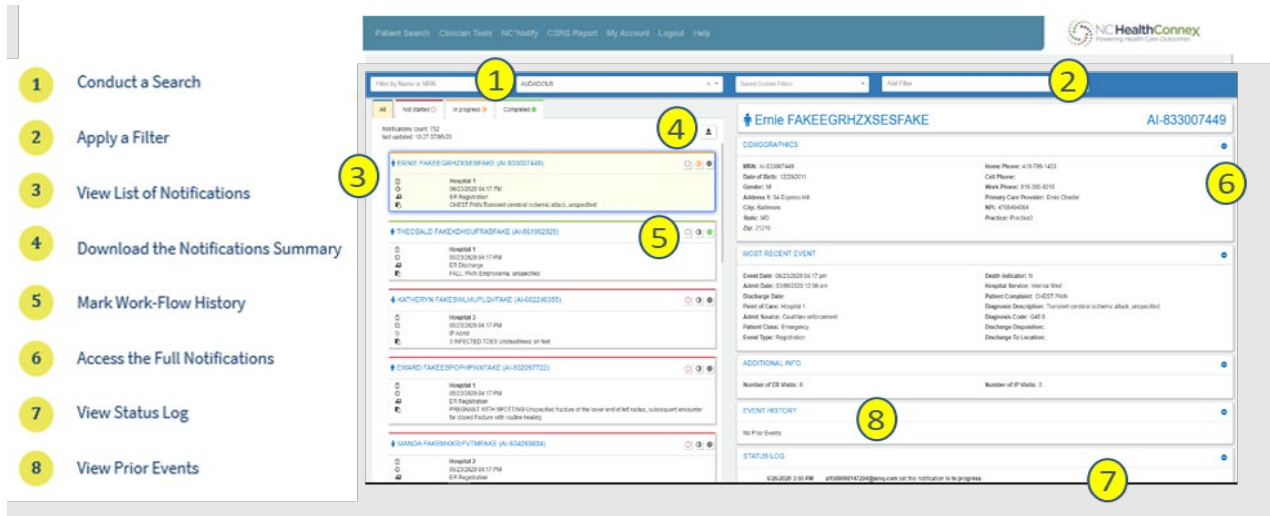
If you have been granted access to view NC*Notify notifications via the clinical portal, the screen below will appear:



If you are not a NC*Notify subscriber, the screen below will appear with directions on how to enroll and an overview of the NC*Notify service.



If you have been granted access to NC*Notify notifications via the clinical portal, the screen below will appear. The screenshot shown provides a brief overview of each section.



Learn More About Each Feature

1 Conduct a Search

You can use the search box to filter results by patient name or MRN (Patient ID). The Patient ID or MRN is pulled from the patient panel submitted by the participant. If you prefer to search for the MRN of the source facility (i.e., where the event took place), you can use the **Add Filters** drop-down and apply a filter for Source MRN.

2 Apply a Filter

There are a variety of filter options that can be used to improve the view of notifications. First, if you have access to more than one participant's notification panels (i.e., if you have submitted more than one patient panel), you can click the **Participant** drop-down to see notifications from a single panel or all panels combined. Additionally, you can filter by specific data elements in the notification using the Add Filters drop-down (e.g., number of ER Visits, Diagnosis, Chief Complaint, PCP, Event Type). This feature allows you to apply specific search criteria to the notifications view. For example, you could search for frequent ED utilizers with filters for Patient Class = Emergency (E), Event Type = Discharge (A03), and Number of ER visits > 3.

3 View List of Notifications

The notifications preview provides a quick summary of the following items:

- Gender
- Name
- MRN/Unique identifier assigned by you (the Participant)
- The date and time of the encounter/event
- The notification event type
- Patient complaint followed by the diagnosis (if provided)

4 Download the Notifications Summary

One of the buttons in the upper right corner of the notifications preview section is the download button. This allows you to download all notifications or a list of notifications that have been selectively filtered (up to a maximum of 500 notifications). The downloaded notifications are saved as a comma-separated file (.csv), which will open in Microsoft Excel. This feature allows you to download notifications at any time based on his/her selected criteria and share data with outside users or care teams, add additional data to the spreadsheet, and more.

5 View Workflow Status

The NC*Notify dashboard within the clinical portal has three basic workflow statuses (Not Started, In Progress, and Completed) to allow you to track actions taken during care coordination. Each status corresponds to the respective tab in the notifications preview screen and will also be recorded in the Status Log section of the full notification view.

6 Access the Full Notification

When a notification is selected from the list, a more detailed view will display on the right with information from both the ADT message and the patient panel submitted by the Participant. This includes key demographic and event information including, but not limited to:

- Name
- Patient ID or MRN
- Date of Birth
- Address
- Number of IP and ER Visits (last 6 months)
- Number of IP and ER Visits (last 6 months)

- Recorded Event Date and Time
- Patient Class (e.g., ER, IP, OP)
- Event Type (e.g., Admit, Discharge)
- Event Location
- Patient Diagnosis
- Discharge Disposition
- Discharge Location
- Patient Complaint
- Admit Source

7 View Status Log

A Status Log section is displayed below the **Most Recent Event** and/or **Additional Information** sections of the detailed notification view. This section provides a history of actions you have taken when changing the status. Each entry will record the username, date and time, and which work-flow status was set for the notification.

8 View Prior Events

At the bottom of the detailed notification view, the event notification service also displays a list of historical events for the patient. The **Event History** begins when you go live on NC*Notify (when the first patient panel/roster was submitted). Each prior event is populated by information from the Admission Discharge Transfer (ADT) messages that are received.

Logging Out

To log out of NC*Notify and the clinical portal, click the logout menu item at the top of the screen and close the browser tab.

****Note: Additional enrollment steps are required to access the NC*Notify notification and care coordination tool within the clinical viewer. Participant Account Administrators can request access for users at their organization.*

NC*Notify Enhanced Alerts

NC HealthConnex also offers enhanced alerts that go over and above the standard ADT notifications. Along with new COVID-19 alerts, the following alerts will go out to NC*Notify subscribers when triggered by patient activity:

- **High utilizer alert** – This notification helps you identify frequent visitors to emergency departments (two or more visits in 90 days or less) or patients at high risk for readmission (four or more admissions in 12 months).
- **Dental alerts** – You are alerted when patients visit the emergency department for dental care.
- **Care team change alert** – Triggered when a new organization has subscribed to your patient.
- **Diabetes diagnosis alert** – You are alerted upon a new diabetes and/or pre-diabetes diagnosis for patients you are monitoring.
- **Chronic care management alert** – You receive an alert when a patient meets the Centers for Medicare and Medicaid Services' chronic care management services criteria.

The screenshot below highlighting the High Utilizer alert, is an illustration of how these alerts will appear on the NC*Notify dashboard.

DEMOGRAPHICS -

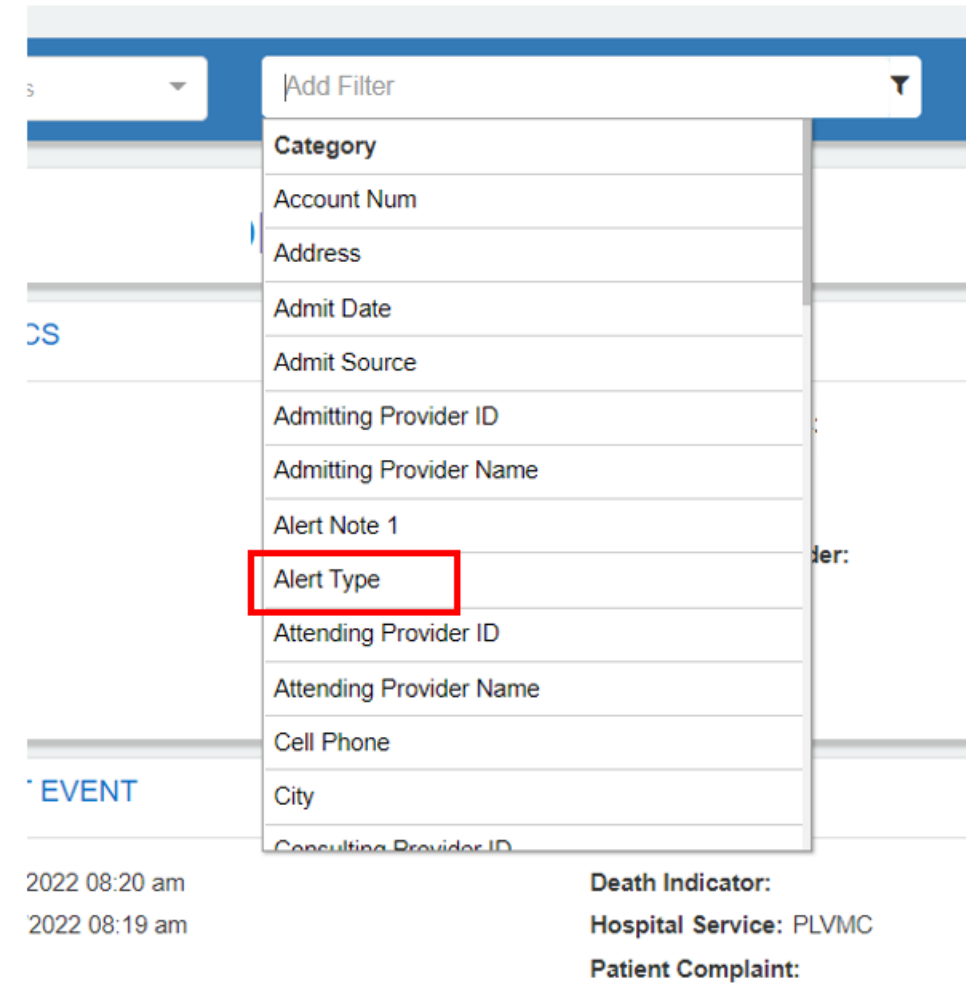
MRN: [REDACTED]	Home Phone: [REDACTED]
Date of Birth: [REDACTED]	Cell Phone:
Gender: M	Work Phone:
Address 1: [REDACTED]	Primary Care Provider:
City: WASHINGTON	NPI:
State: NC	Practice:
Zip: [REDACTED]	

MOST RECENT EVENT -

Event Date: [REDACTED]	Death Indicator:
Admit Date: [REDACTED]	Hospital Service: [REDACTED]
Discharge Date:	Patient Complaint:
Organization: [REDACTED]	Diagnosis Description:
Admit Source: RA	Diagnosis Code:
Patient Class: Emergency	Discharge Disposition:
Event Type: Admit	Discharge To Location:
Alert Type: ER - High Utilizer Alert	Alert Note:
Event Facility: [REDACTED]	Facility: PLVMC
Department: [REDACTED]	Attending Provider Name: ATTENDING EMERGENCY
Observation Status: N	Attending Provider ID: [REDACTED]
Admitting Provider Name: ATTENDING EMERGENCY	Referring Provider Name:
Admitting Provider ID: [REDACTED]	Referring Provider ID:
Consulting Provider Name:	Patient Identified Provider Name: [REDACTED]

Close

For new NC*Notify enrollees, these new alerts can be requested during enrollment. For current users of the service, you can simply reach out to the HIEA team and request access to the new alerts. As mentioned above, the filtering option helps you find the notifications that are most meaningful to you. The screenshot below is an example of how this feature is currently being used:



Uploading a Patient Panel in NC HealthConnex Clinical Portal

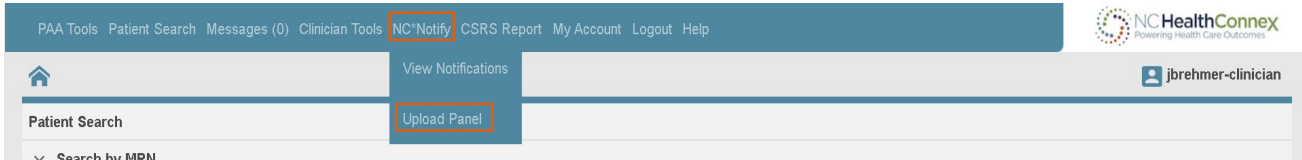
What is the Self-Service Panel Loader?

The Self-Service Panel Loader (SSPL) is a panel management tool available if you are a user who is assigned the %HS_NCNotify_SSPL role. SSPL provides an easy, fast, and convenient method for submitting panels for practices. You will also receive an immediate response when panels are loaded successfully or incorrectly.

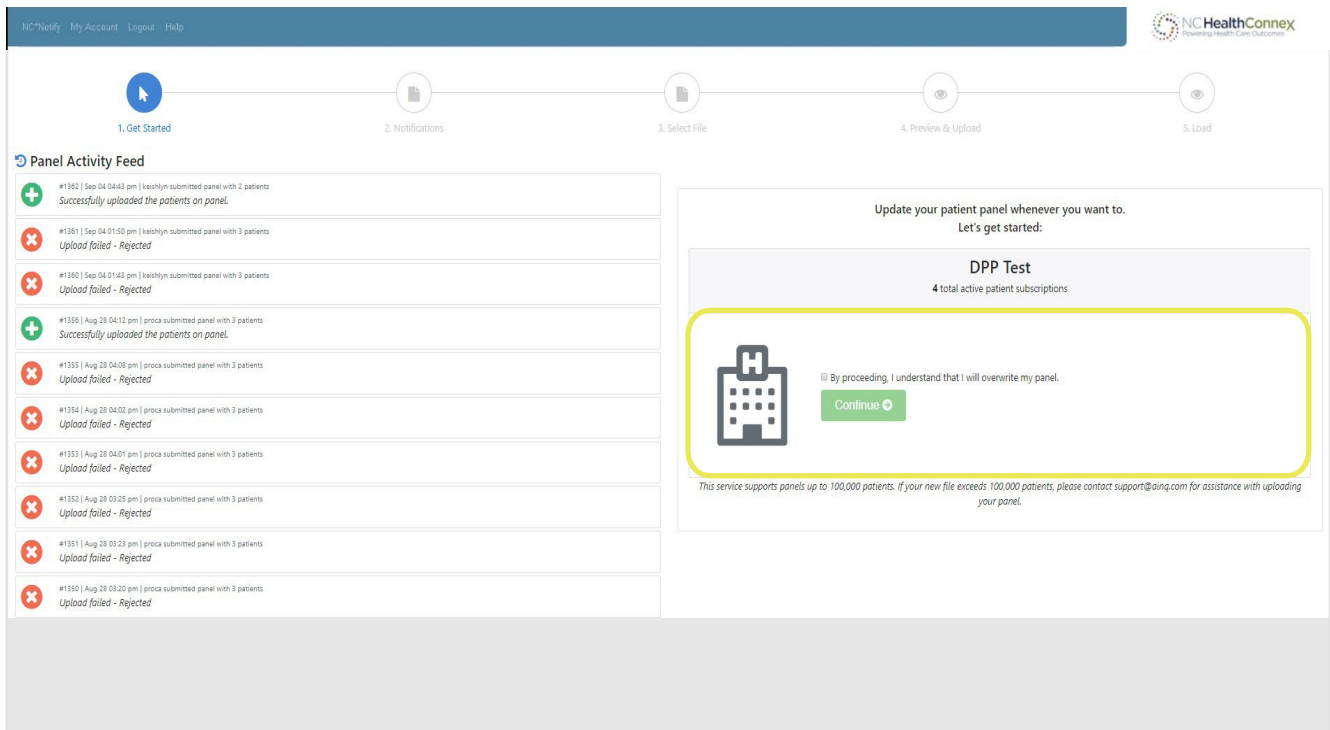
How to Upload a Panel

Step 1 - Upload Panel

Hover over NC*Notify on the menu bar and click Upload Panel.

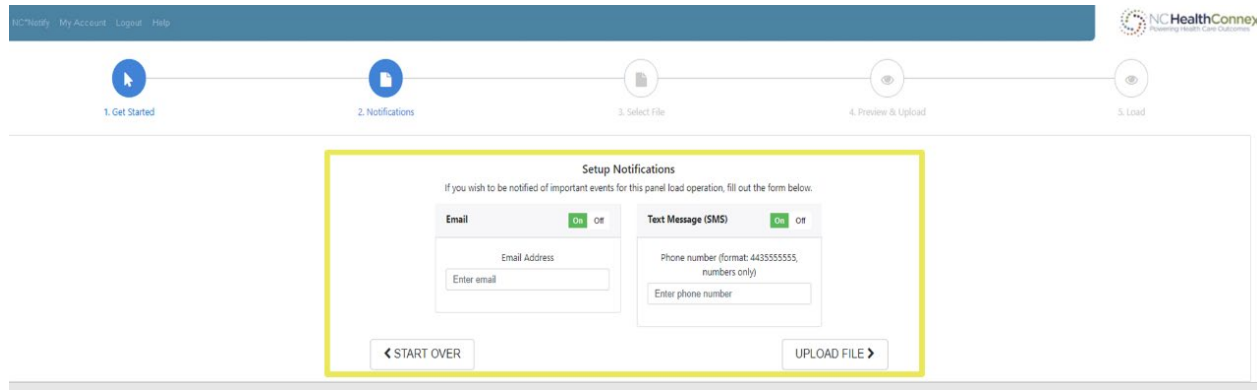


On the default screen, you will notice your panel activity feed. The left-hand side of the screen will show you the status of your panel, whether it was successfully loaded or not. To proceed with uploading your panel, click the check box next to *“By proceeding, I understand that I will overwrite my panel,”* and click **Continue**.



Step 2 - Push Notifications

Once panel loading is completed, turn on the email or text notification to be notified. Enter the email or phone number that will be used, then click on **Upload File** to attach panel.



Step 3 – Patient Panel Template

If you need the most updated **Patient Panel Template**, click the **Download Template File** link to download a panel template.

To prevent panels from failing when being loaded, ensure that all required fields are populated:

- MRN
- First Name
- Last Name
- Note: _ or \$ are useable, but ASCII characters or blank patient id are not valid
- Address 1
- City
- State
- Zip
- Birth Date (MM/DD/YYYY)
- Gender

Ensure that all the information is in the right format. Click **View Formatting Information** link for each field.

More details on the file naming structure will be provided by our technical team during onboarding.

Example: ENS_TEST-1-z-09-23-2019

The file must be saved as a .CSV prior to uploading.

Step 4

After attaching the file, the system will give you a preview of the rows to be loaded. Review the fields to ensure the headings match the data. It will also show the number of new patients that will replace your current patient panel and the correct naming convention.

Click on **Upload New Panel File**.

A sample of your panel is available to review in the table below.
Please make sure data appears to be in the correct columns.
Previewing a sample of 10 rows from the file containing patient information:

Standard Field (Your Field)	Address_1 (Address_1)	Account_Number ACO (Account_Number) (ACO)	Address_2 (Address_2)	Birthdate (Birthdate)	Care_Manager (Care_Manager)	Care_Manager_Email (Care_Manager_Email)	Care_Manager_ID (Care_Manager_ID)	Care_Manager_Phone (Care_Manager_Phone)	Care_Program_EndDt (Care_Program_EndDt)	Care_Program (Care_Program)	CareProgramDuration (CareProgramDuration)	City (City)	Cell_Phone (Cell_Phone)
	86048 Tennyson Park	658338		1969-04-13								Oakland	510-492-4539
	90 Elgar Point	328838		1924-09-18								Philadelphia	215-835-3613
	76 Norway Maple Junction	536381		1915-05-30								Newark	302-176-2501
	4 Eastlawn Pass	797569		1977-09-24								Baltimore	443-189-5892
	0 Sycamore Pass	478769	Suite R	1975-01-17								Sioux Falls	605-121-4700
	88 Golf View Road	220479		1976-09-07								Jamaica	917-962-4475
	58 Crescent Oaks Hill	288128		1965-04-15								Anchorage	907-849-8373
	5 Fairview Trail	878078		1915-11-29								Denver	303-260-2693
	407 Lakewood Gardens Court	373061	Bldg. 5	2017-11-23								Austin	361-576-0874
	57148 Rowland Way	192329		1917-05-29								Racine	262-213-9113

Current Panel

Active Patients: 2

New Panel

Patients in queue: 20
File Name: ENS_ALED-1-c-9-30-2019.csv

◀ CHOOSE ANOTHER FILE
UPLOAD NEW PANEL FILE ▶

Step 5

A status bar will appear showing the progress of the upload. Once the panel is loaded successfully, the **Roster File Upload Complete** notification will appear.

Click the **Close** button to proceed.

1. Get Started
2. Notifications
3. Select File
4. Preview & Upload
5. Load

Waiting for User Action - Review Validation Results

Total: 1481
08/30/2019 1:39 pm
20 total rows

PARSE
20 complete

VALIDATE
20 complete

MPI
Waiting...

COMMIT
Waiting...

Review Panel

Panel is ready for Review. Please select the Review button to view the results of the validation step.

1. Get Started
2. Notifications
3. Select File
4. Preview & Upload
5. Load

Total: 1481
08/30/2019 1:39 pm
20 total rows

PARSE
20 complete

VALIDATE
20 complete

MPI
Waiting...

COMMIT
Waiting...

Review Panel

Roster File Upload Complete

The roster file upload task has completed. You can view the results in the Panel Activity Feed.

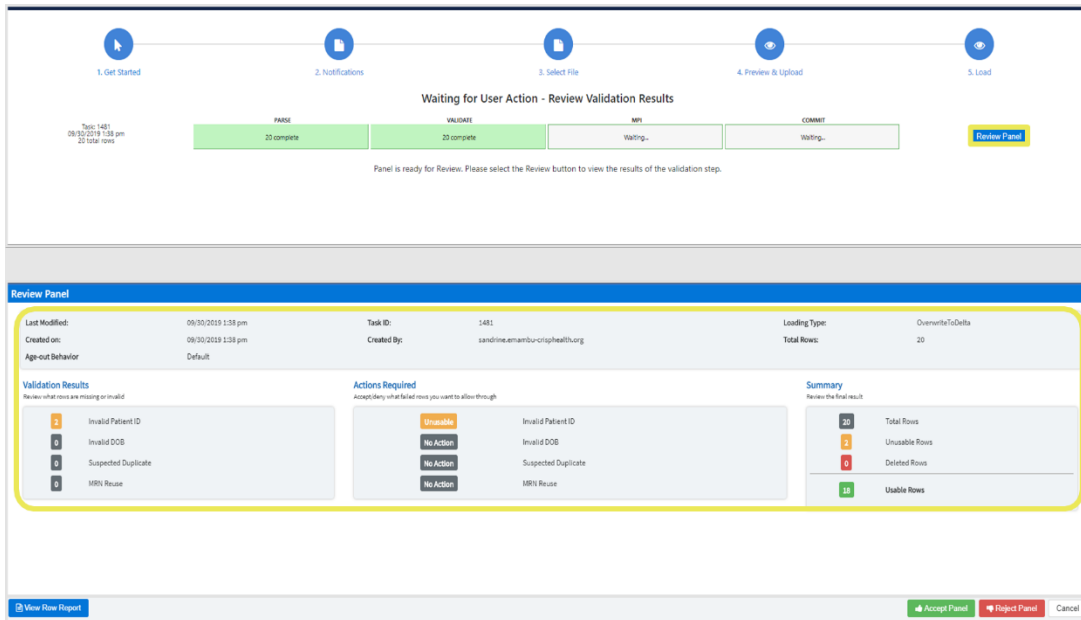
Close

COMPLETE

Panel Size	Average Upload Time
80-120 patients	8 minutes
900-1,100 patients	18 minutes
7,000-14,000 patients	25 minutes
95,000-105,000 patients	1 hour 27 minutes

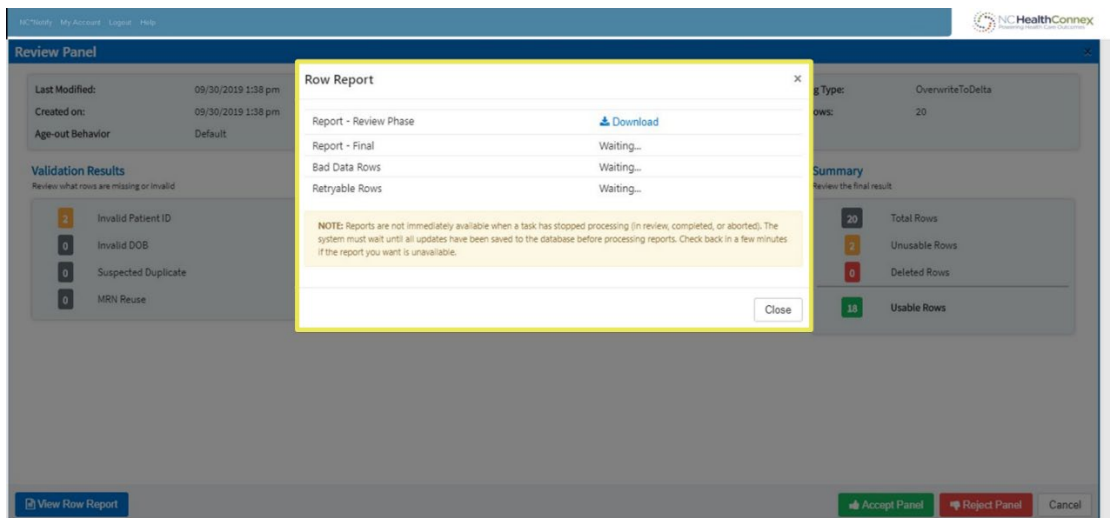
Step 6 – Review Panel

Some panels may require additional review prior to upload completion. To review, click the **Review Panel** button. The review button will show the number of rows that must be reviewed.



Step 7

Click the **View Row Report** button then select the download link to view specifics rows within the panel that requires additional review.

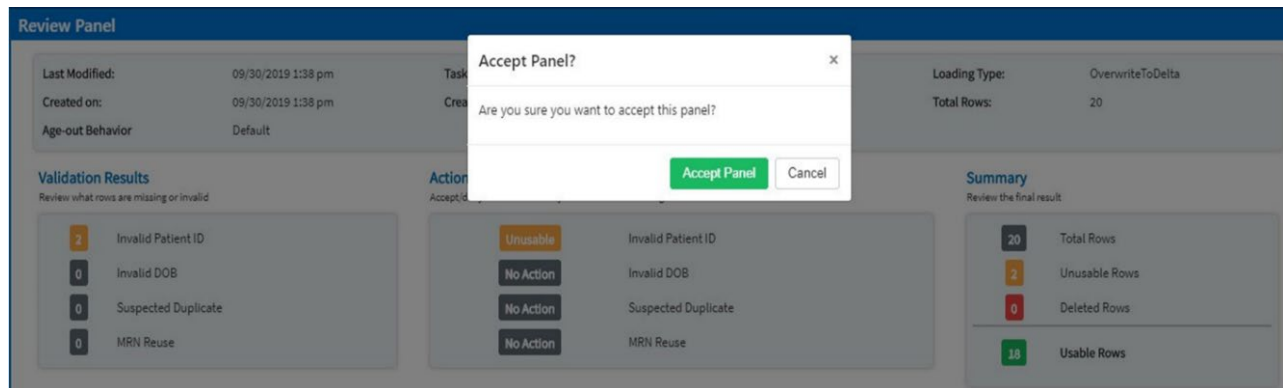


Step 8

After reviewing the report, select the thumbs up button to accept or the thumbs down button to reject the panel.

Accepting the Panel = Panel will be uploaded without the rows with the errors.

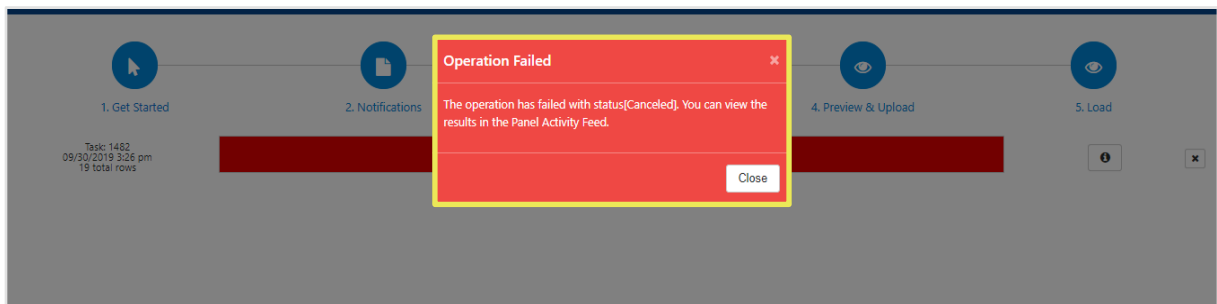
Rejecting the Panel/Cancel = Upload task will be cancelled, allowing you to make corrections before re-uploading.



Step 9

If a panel fails after the review and loading stage, complete the following steps:

- Go to the **Panel Activity Feed**.
- Find the panel fail notification.
- Click on the **X** button on the notification.
- Review rows and failure reasons by clicking on the **View Row Error Report** button.



Common reasons why panels fail are:

- The file is not saved as .CSV format.
- Headers/Column Names in **Patient Panel Tablet** have been altered.
- Download a patient panel template and use as is.
- Review rows and failure reasons by clicking on the **View Row Error Report** button.
- File naming convention is incorrect.

Step 10 - Confirmation

Our System will send a confirmation email or text after every successful upload if you have entered your information in step 2.


CLINICIAN TOOLS

The Clinician Tools feature of the NC HealthConnex Clinical Portal allows you to create working patient lists and tag patients with one of three common patient-provider relationships. Once you create a new list, you may do certain actions on that list such as messaging about the patient, downloading a patient summary or copying the patient to another list.

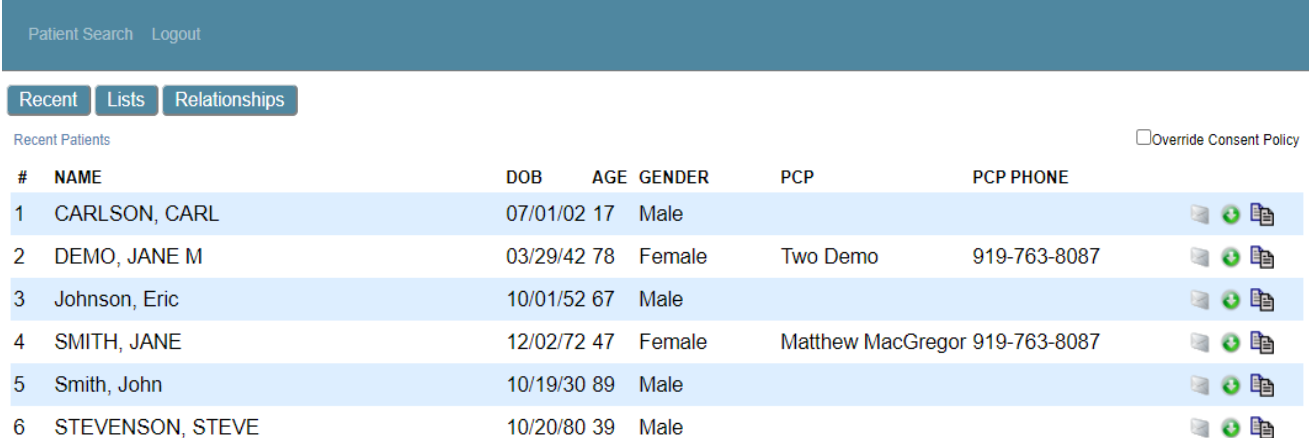
The Clinical Portal allows users to create patient lists based on their clinical and care management needs. This can be useful if a clinician or care manager would like to regularly track, for example, high-risk patients.

Once you create a new list, you may take certain actions from that list quickly, such as messaging about the patient, downloading a patient summary, or copying the patient to another list.

To access **Clinician Tools**, click the **Clinician Tools** tab from the **Main Menu** or **Patient View Menu** bars, as shown below. Please note that **Clinician Tools** will open in a new tab in your browser. When you are finished working in Clinician Tools, simply close the tab and you may resume working in the original Clinical Portal tab that you had open.





 The screenshot shows a dark blue navigation bar with the following items: PAA Tools, Patient Search, Messages (0), **Clinician Tools** (highlighted with a yellow box), NC*Notify, CSRS Report, My Account, Logout, and Help.

Once opened, the **Clinician Tools** main screen displays your **Recent Patients** list, including patients for whom you have recently viewed the patient record (clinical information). Patients are listed in alphabetical order. This list includes the patient's name, date of birth, age, gender, primary care provider (PCP), PCP phone number, and three quick action icons at right. The **Clinician Tools Main Screen/Recent Patients** list is shown below.


 The screenshot shows the Clinician Tools interface. At the top, there are links for Patient Search and Logout. Below that are three tabs: Recent (selected), Lists, and Relationships. A checkbox for 'Override Consent Policy' is visible. The main content is a table of 'Recent Patients' with columns for #, NAME, DOB, AGE, GENDER, PCP, and PCP PHONE. Each row has three icons on the right: a mail icon, a green plus icon, and a document icon.

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE	
1	CARLSON, CARL	07/01/02	17	Male			
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087	
3	Johnson, Eric	10/01/52	67	Male			
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087	
5	Smith, John	10/19/30	89	Male			
6	STEVENSON, STEVE	10/20/80	39	Male			

From the **Clinician Tools** main screen, you may:

- Work a patient list, including:
- View a patient record by clicking on the patient's name*,
- Send a message about a patient by clicking the envelope quick action icon  at right,
- Download a patient summary  by clicking the green download quick action icon at right, or
- Copy a patient to another list by clicking the lists quick action icon  at right.
- Create additional patient lists/access created patient lists by clicking on the button at the top left **Lists**
- Tag patients with a patient-provider relationship by clicking on the button at the top left menu **Relationships**



















*****Note:** If you do not have a data-driven relationship (organizational tie) with a patient, you will have to break the privacy seal to view the patient record, as described in the [Break the Seal](#) section of this user guide, and below in [Working Patient Lists](#).

Working Patient Lists

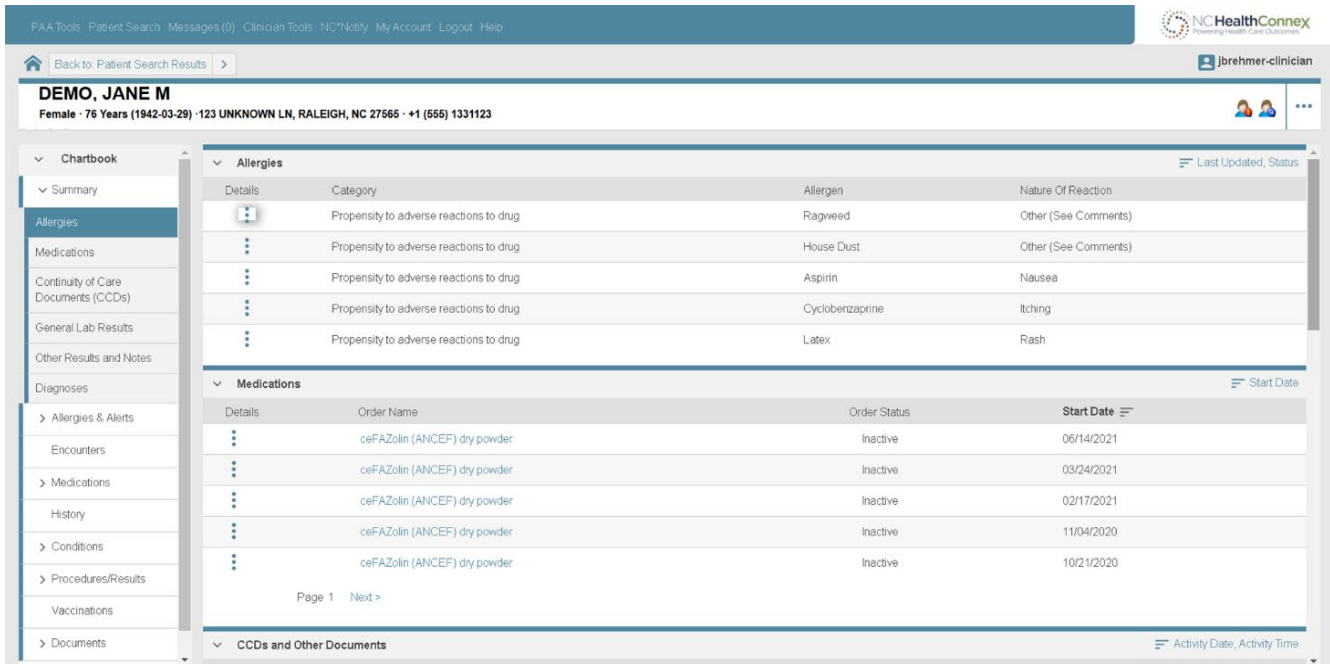
As described above, you may take four (4) main actions from any patient list within the **Clinician Tools** area of the Clinical Portal. These actions are described below.

Action 1

To view a patient record, click on the patient's name within a list. If you have a data-driven relationship (organizational tie) with a patient (as described in the [Break the Seal](#) section of this user guide), the record will open instantly, as shown below.

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE	
1	CARLSON, CARL	07/01/02	17	Male			  
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087	  
3	Johnson, Eric	10/01/52	67	Male			  
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087	  
5	Smith, John	10/19/30	89	Male			  
6	STEVENSON, STEVE	10/20/80	39	Male			  

↓



Chartbook

- Summary
- Allergies
- Medications
- Continuity of Care Documents (CCDs)
- General Lab Results
- Other Results and Notes
- Diagnoses
- Allergies & Alerts
- Encounters
- Medications
- History
- Conditions
- Procedures/Results
- Vaccinations
- Documents

DEMO, JANE M
Female • 76 Years (1942-03-29) • 123 UNKNOWN LN, RALEIGH, NC 27665 • +1 (555) 1331123

Allergies Last Updated, Status

Details	Category	Allergen	Nature Of 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

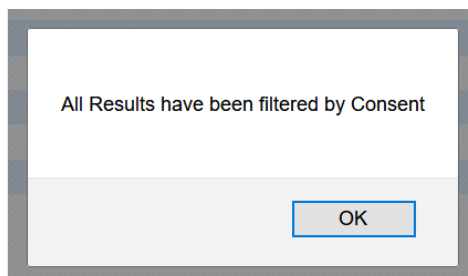
Medications Start Date

Details	Order Name	Order Status	Start Date
⋮	ceFAZolin (ANCEF) dry powder	Inactive	06/14/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	03/24/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	02/17/2021
⋮	ceFAZolin (ANCEF) dry powder	Inactive	11/04/2020
⋮	ceFAZolin (ANCEF) dry powder	Inactive	10/21/2020

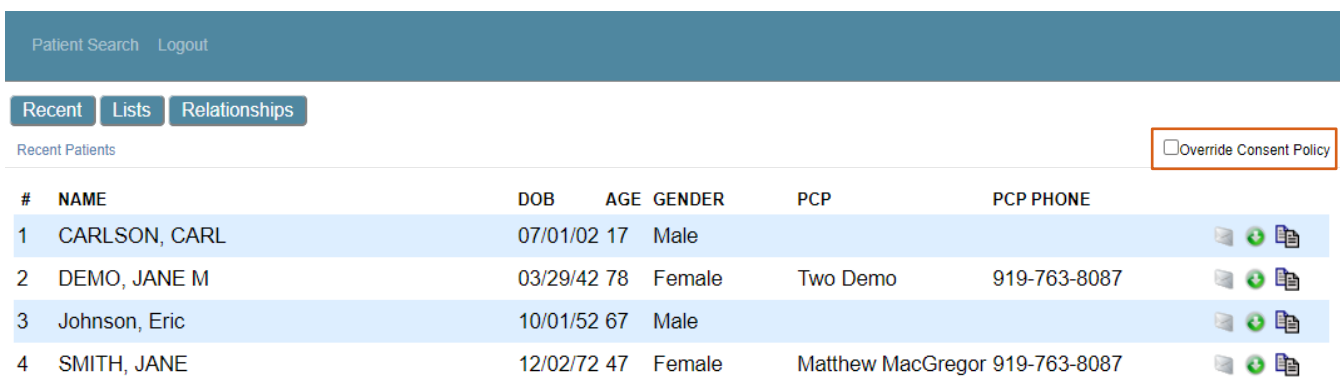
Page 1 Next >

CCDs and Other Documents Activity Date, Activity Time

If you do not have a data-driven relationship (organizational tie) with a patient, clicking on a patient name will yield a pop-up message, as shown below.



To continue to the patient record, click **Ok** to the above message, then proceed to break the seal for the patient by clicking the checkbox next to **Override Consent Policy** in the upper right-hand corner of the screen, as shown below.



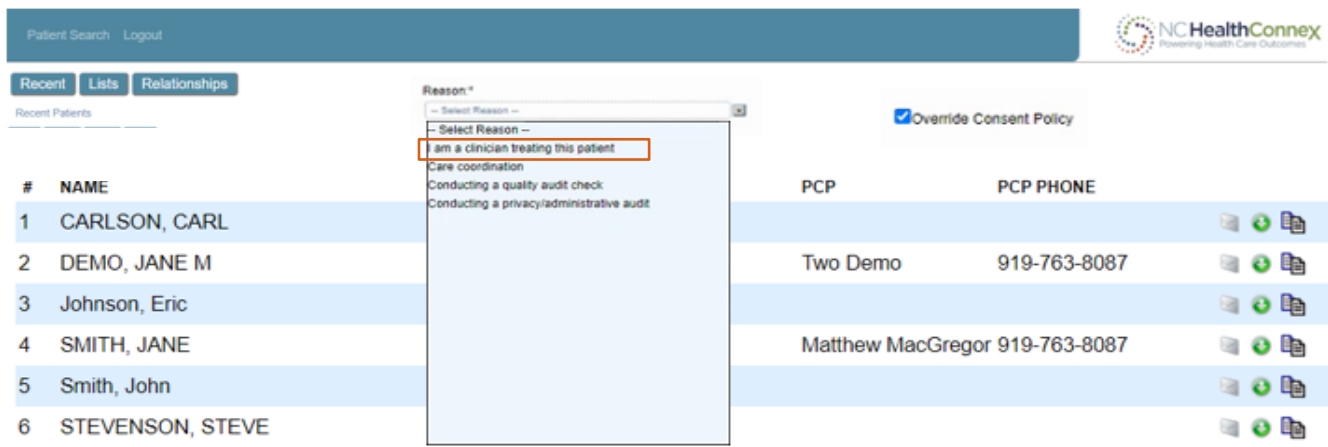
Patient Search Logout

Recent Lists Relationships

Recent Patients Override Consent Policy

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE
1	CARLSON, CARL	07/01/02	17	Male		
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087
3	Johnson, Eric	10/01/52	67	Male		
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087

Once the **Override Consent Policy** box is checked, a **Reason** drop-down menu will appear at the top center of the screen, above the patient list. Select the appropriate reason to view the record from the list.



Reason*


- Select Reason --
- I am a clinician treating this patient
- Care coordination
- Conducting a quality audit check
- Conducting a privacy/administrative audit

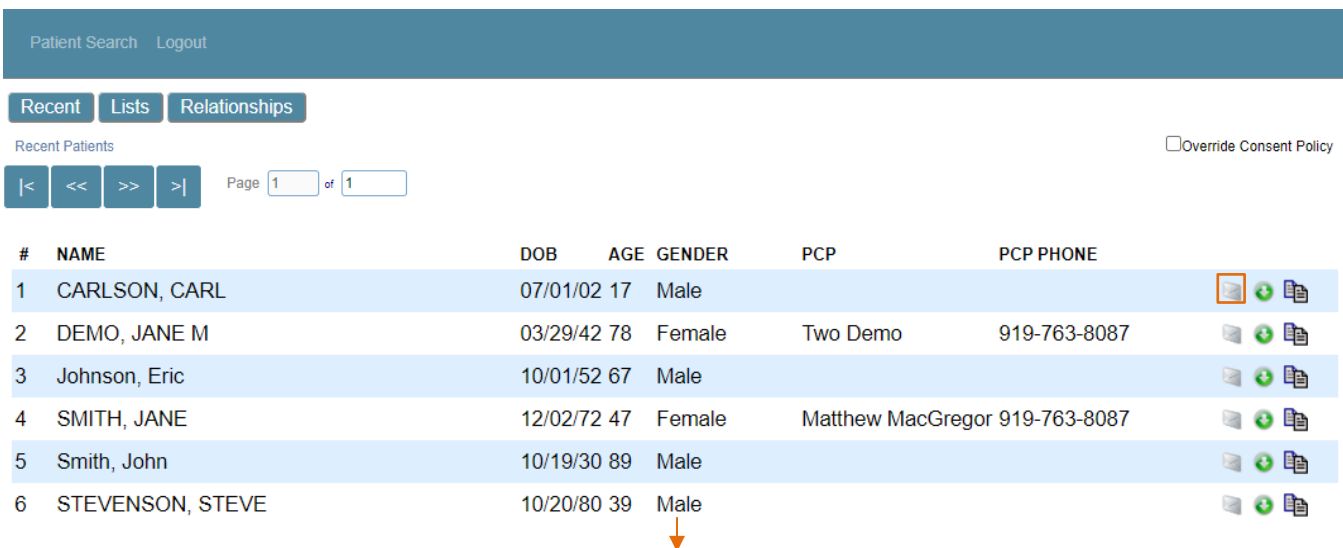
Override Consent Policy

#	NAME	PCP	PCP PHONE
1	CARLSON, CARL		
2	DEMO, JANE M	Two Demo	919-763-8087
3	Johnson, Eric		
4	SMITH, JANE	Matthew MacGregor	919-763-8087
5	Smith, John		
6	STEVENSON, STEVE		

After a reason is selected, click the patient's name again, and the record will open instantly.

Action 2

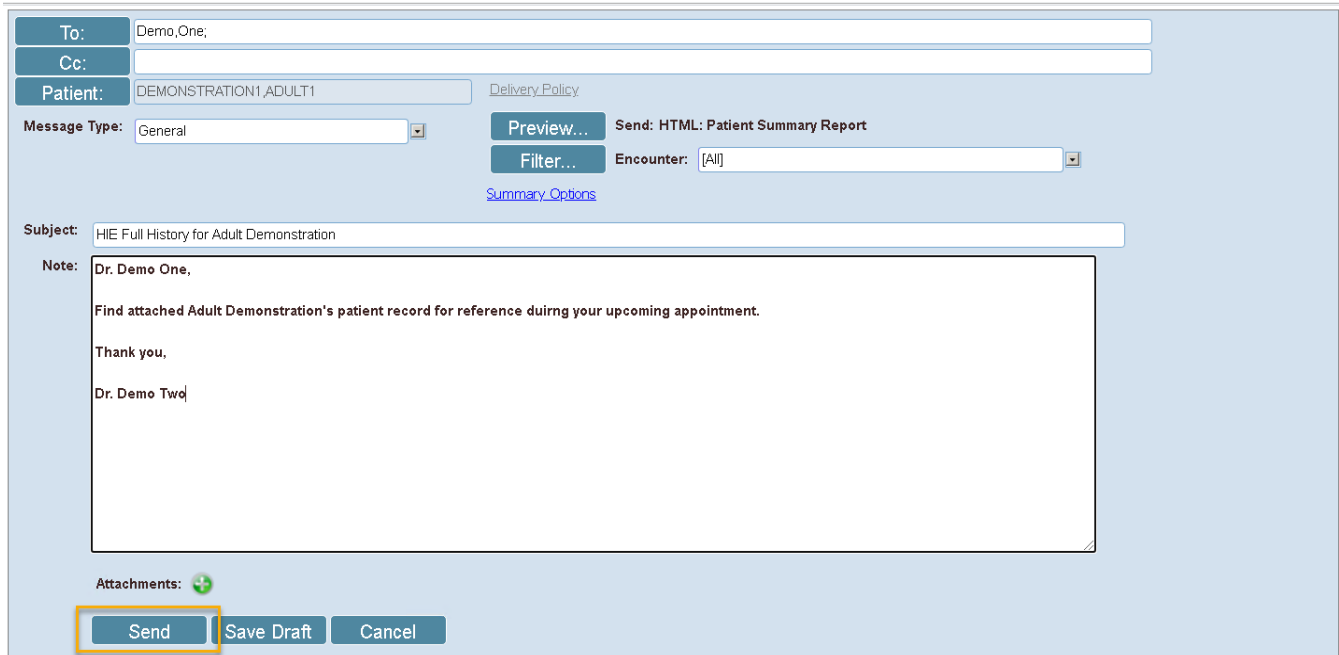
To send a message about a patient, click on the envelope quick action icon  at right within the row of patient information. If you have a data-driven relationship (organizational tie) with a patient (as described in the [Break the Seal](#) section of this user guide), a new message will open instantly. Once a recipient is entered into the **To:** field (as described in the [Composing Messages](#) section of this user guide), the message will show an attached patient record, and you may complete the remaining message fields and send the message, as shown below.



Recent Patients Override Consent Policy

Page 1 of 1

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE
1	CARLSON, CARL	07/01/02	17	Male		
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087
3	Johnson, Eric	10/01/52	67	Male		
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087
5	Smith, John	10/19/30	89	Male		
6	STEVENSON, STEVE	10/20/80	39	Male		



To: Demo,One,

Cc:

Patient: DEMONSTRATION1_ADULT1 [Delivery Policy](#)

Message Type: General Send: HTML: Patient Summary Report

Encounter: [All] [Summary Options](#)

Subject: HIE Full History for Adult Demonstration


Note:

Dr. Demo One,

Find attached Adult Demonstration's patient record for reference during your upcoming appointment.


Thank you,

Dr. Demo Two

Attachments: 

If you do not have a data-driven relationship (organizational tie) with a patient, you must first break the privacy seal per the instructions on page 49 above.

Action 3



















To download a patient summary, click the green download quick action icon  at right within the row of patient information. If you have a data-driven relationship (organizational tie) with a patient (as described in the [Break the Seal](#) section of this user guide), a new pop-up window will appear, allowing you to customize and download a patient report, as shown below.

*****Note:** For information on selecting a report type and format, see the [Reports](#) section of this user guide. For information on filtering a report, see the [see the Attaching Patient Information to a Message section of this user guide](#).

Patient Search [Logout](#)

Recent Patients Override Consent Policy

Page 1 of 1

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE	
1	CARLSON, CARL	07/01/02	17	Male			  
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087	  
3	Johnson, Eric	10/01/52	67	Male			  
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087	  
5	Smith, John	10/19/30	89	Male			  
6	STEVENSON, STEVE	10/20/80	39	Male			  



Download Summary for Patient:

DEMO, JANE M.


Select Summary: Patient Summary Report Select Format: HTML

Filter... Encounter: [All]

Download Close

Clicking “Download” opens a pop-up window allowing you to open or save the file.

Action 4













To copy a patient (or all patients) to another list, click the lists quick action icon  at right within the row of patient information. If you have a data-driven relationship (organizational tie) with a patient (as described in the [Break the Seal](#) section of this user guide), a new pop-up window will appear, allowing you to select the list to which to add the patient, and whether they’d like to add only this patient or all patients in the current list. After selecting preferences, clicking **Copy** will copy the patient to the new list and confirm this action with a new pop-up window, as shown below.

****Note: Patient lists created by way of assigning user-patient relationships are also considered “lists” in this scenario, and so you may add a patient from any list to any user-patient relationship list (e.g., you may add a patient from Recent Patients to your Primary relationship list).*

Patient Search Logout

Recent Lists Relationships

Recent Patients Override Consent Policy

#	NAME	DOB	AGE	GENDER	PCP	PCP PHONE	
1	CARLSON, CARL	07/01/02	17	Male			  
2	DEMO, JANE M	03/29/42	78	Female	Two Demo	919-763-8087	  
3	Johnson, Eric	10/01/52	67	Male			  
4	SMITH, JANE	12/02/72	47	Female	Matthew MacGregor	919-763-8087	  

Copy Patient(s)

DEMO, JANE M

Copy To:
 List Relationship

Select List*
 Diabetics

Copy:
 This Patient All Patients in List

Copy Cancel

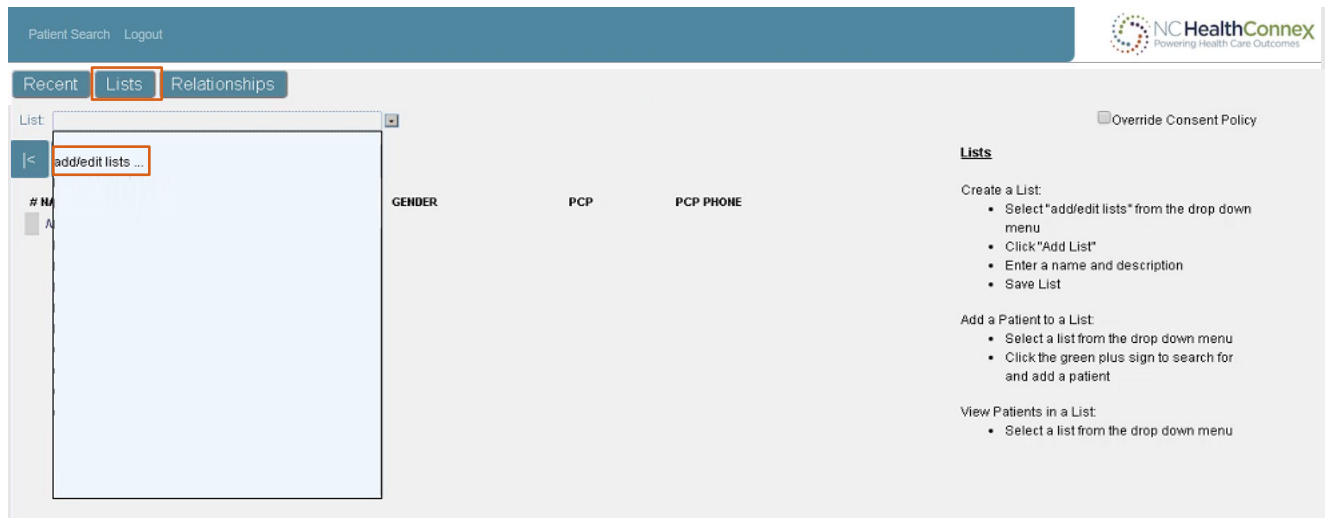
Patients Moved: 1

OK

Creating Additional Patient Lists

The NC HealthConnex Clinical Portal allows you to create patient lists based on your clinical and care management needs. This can be useful if you are a clinician or care manager and would like to regularly track a group of patients—for example, high-risk patients, a group enrolled in a clinical trial, or those with specific chronic conditions. System administrators may create additional lists which can be shared with you and will appear in the List drop down.

To create a new patient list, first click on the **Lists** button at the top left menu of the **Clinician Tools** screen and select **add/edit lists...** from the **List** drop-down menu. Then click the **Add List** button on the next screen, enter a name and description as prompted, and click **Save List**, as shown below.



Recent **Lists** Relationships

List: **add/edit lists ...**

Override Consent Policy

Lists

Create a List:

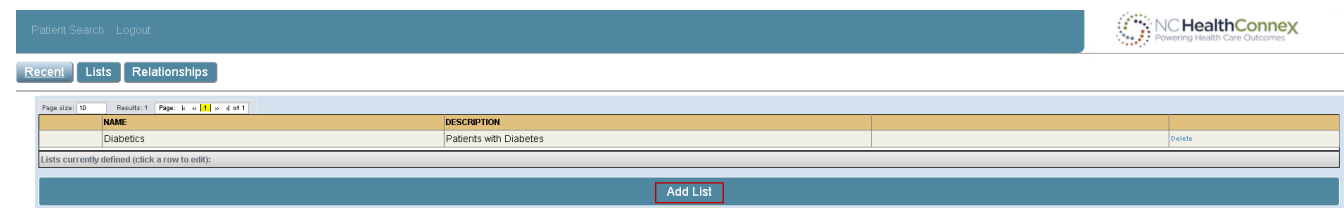
- Select "add/edit lists" from the drop down menu
- Click "Add List"
- Enter a name and description
- Save List

Add a Patient to a List:

- Select a list from the drop down menu
- Click the green plus sign to search for and add a patient

View Patients in a List:

- Select a list from the drop down menu

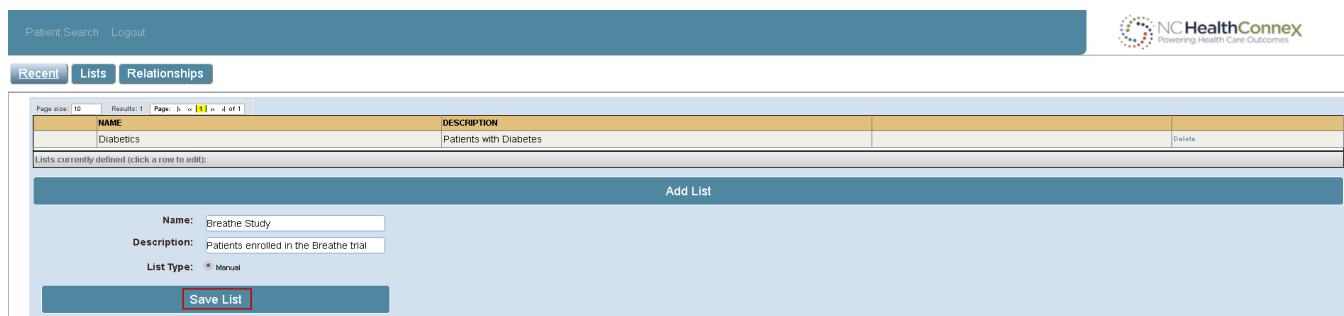
Recent **Lists** Relationships

Page size: 10 Results: 1 Page: 1 of 1

NAME	DESCRIPTION	
Diabetics	Patients with Diabetes	Delete

Lists currently defined (click a row to edit):

Add List

Recent **Lists** Relationships

Page size: 10 Results: 1 Page: 1 of 1

NAME	DESCRIPTION	
Diabetics	Patients with Diabetes	Delete

Lists currently defined (click a row to edit):

Add List

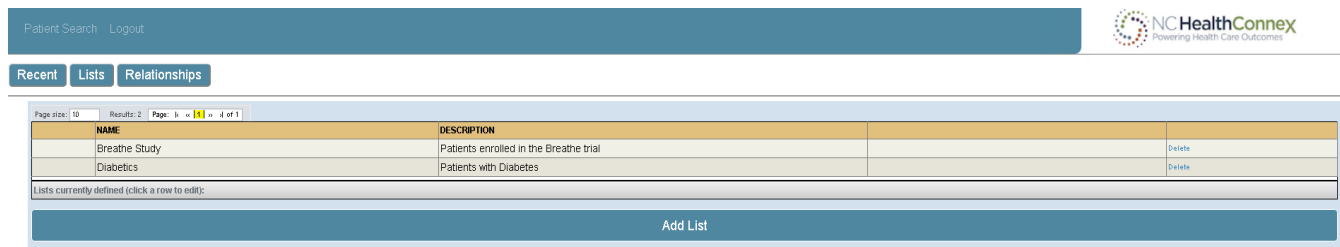
Name:

Description:

List Type: Manual

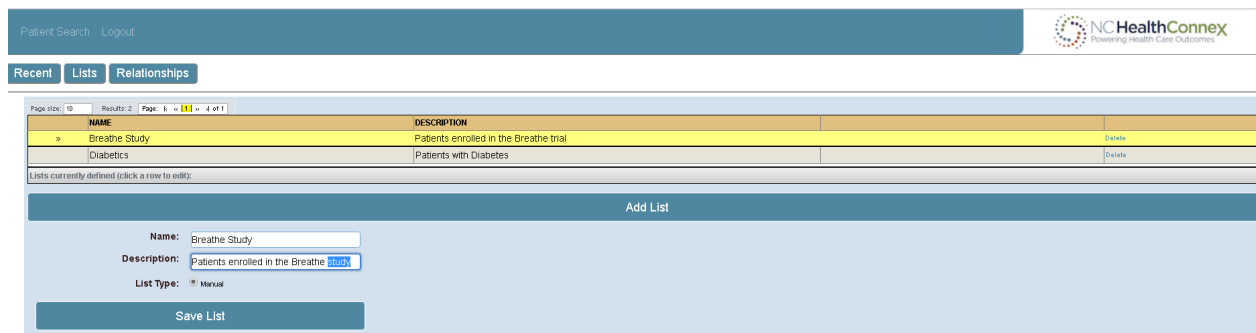
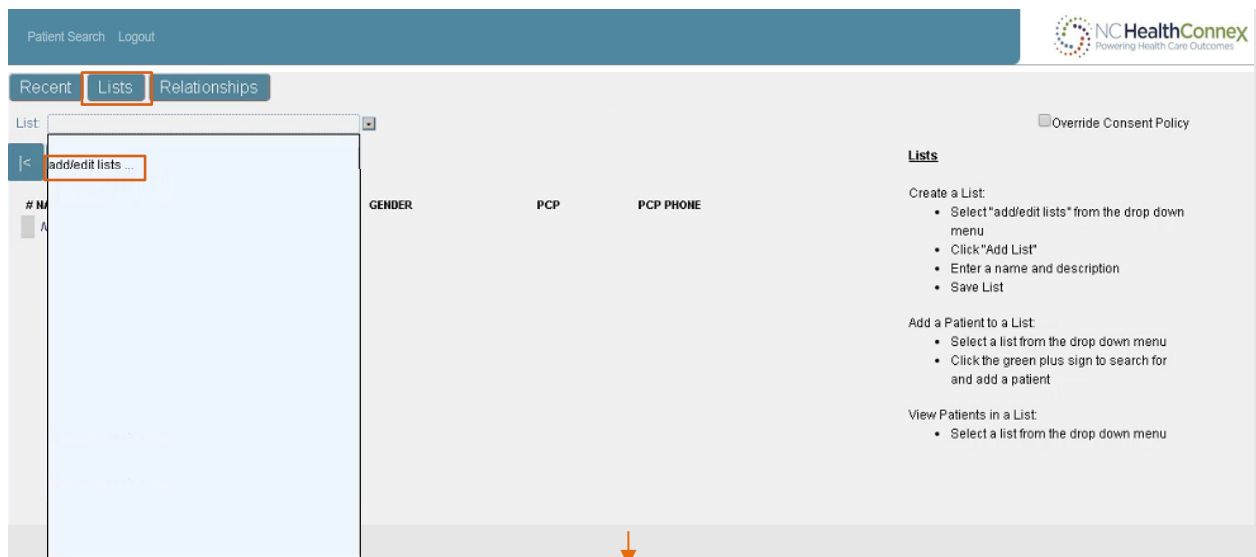
Save List

Once saved, the new patient list will appear in the list above, as shown below.

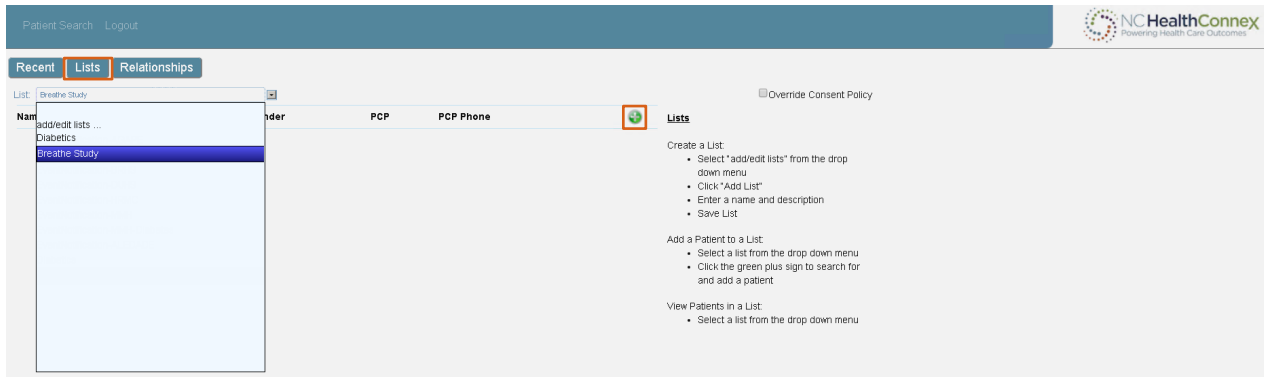


To edit an existing list, navigate back to the main **Lists** screen by clicking the **Lists** button at the top left menu, and selecting the **add/edit lists...** from the **List** drop-down menu. Then, click the desired list name, edit the name and description as prompted, and click **Save List**, as shown below.

*****Note:** You can only edit lists that you have created.



To add a patient to a list, first click on the **Lists** button at the top left menu of the **Clinician Tools** screen and select the list name from the **List** drop-down menu. Then click the **green plus sign icon** at the right of the **+** screen, enter patient demographic or MRN information for the patient, and click **Search**. Finally, select the patient's name from the results list to add the patient to your relationship list, as shown below.



Recent Lists Relationships

List: Breathe Study

Diabetics
Breathe Study

Override Consent Policy

Lists

Create a List:

- Select "add/edit lists" from the drop down menu
- Click "Add List"
- Enter a name and description
- Save List

Add a Patient to a List:

- Select a list from the drop down menu
- Click the green plus sign to search for and add a patient

View Patients in a List:

- Select a list from the drop down menu



Patient Search

EMR Id

Assigned By

Last Name

First Name

Middle Name

Gender

Date of Birth

(yyyy-mm-dd)

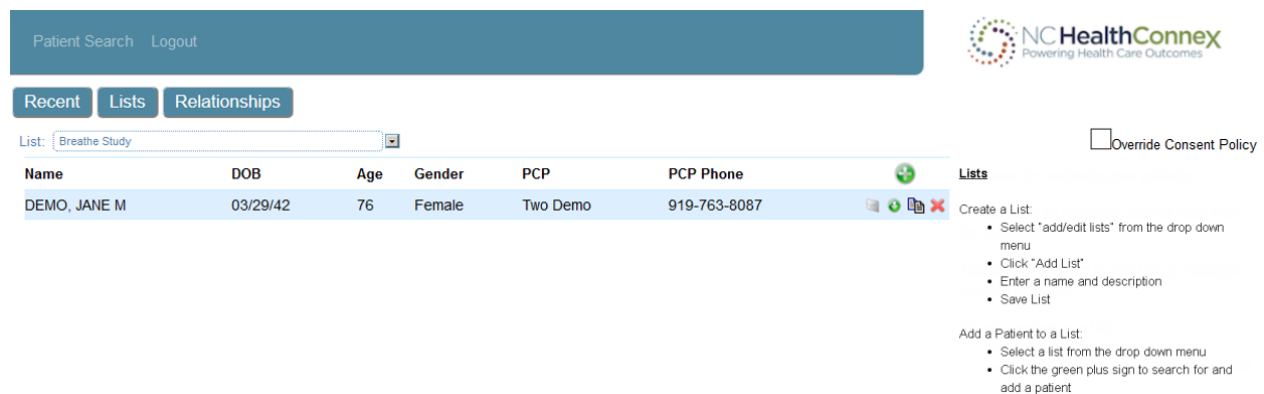
Recent

Patient Search

Select a patient by clicking the patient name.

* NOTE: Some records have been filtered due to Consent

Identifiers	Name	Gender/DOB	Address	Rank
100000069 ...4321	DEMO, JANE M	F 1942-03-29	123 UNKNOWN LN, RALEIGH NC 27565	16.1

Recent Lists Relationships

List: Breathe Study

Override Consent Policy

Name	DOB	Age	Gender	PCP	PCP Phone	Lists
DEMO, JANE M	03/29/42	76	Female	Two Demo	919-763-8087	


Lists

Create a List:

- Select "add/edit lists" from the drop down menu
- Click "Add List"
- Enter a name and description
- Save List

Add a Patient to a List:


- Select a list from the drop down menu
- Click the green plus sign to search for and add a patient

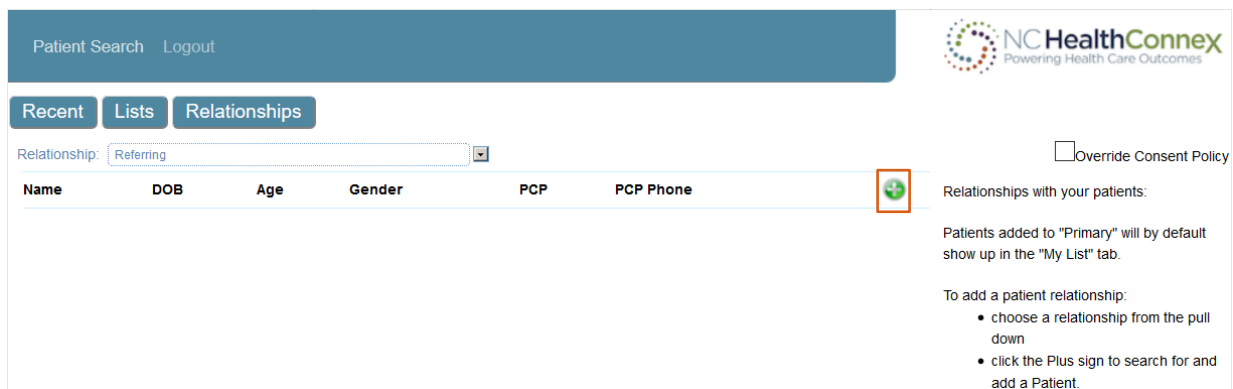
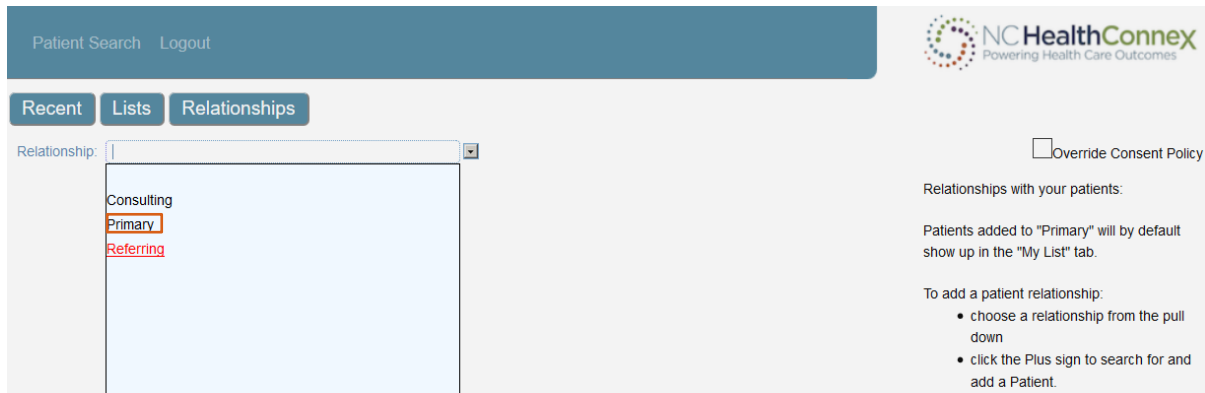
As with the **Recent Patients** list, additional patient lists created by the user contain basic demographic information and allow quick access to messaging about the patient, downloading a patient summary and adding the patient to additional lists (see [the Working Patient Lists](#) section of this user guide). In addition, you may remove a patient from a list they create by clicking the icon at the right of the row of patient  information.

Tagging Patient Relationships

The NC HealthConnex Clinical Portal allows you to tag patients with one of three common patient-provider relationships based on their clinical/care relationship: Consulting, Primary and Referring. This can be useful if a clinician or care manager would like to regularly track one of these groups of patients—for example, patients for which a clinician is the referring provider, to ensure adequate follow-up after any care performed elsewhere.

Tagging a patient-provider relationship can be useful to track a group of patients—for example, patients for which a clinician is the referring provider, to ensure adequate follow-up after care performed elsewhere.

To tag a patient relationship, first click the button at the top left menu of the **Clinician Tools** screen and select a relationship type from the **Relationship** drop-down menu. Then click the **green plus sign icon**  at the right of the screen, enter patient demographic or MRN information for the patient, and click **Search**. Finally, select the patient's name from the results list to add the patient to your relationship list, as shown below.



Patient Search

MRN

Assigned By

Last Name

First Name

Middle Name

Gender

Date of Birth
(yyyy-mm-dd)

Street

City

State

Zip

Phone

SSN

Identifier Type

ID Number

Assigned By

Relationship

Program

Restrict Facility

Recent



Patient Search

Select a patient by clicking the patient name.

* NOTE: Some records have been filtered due to Consent

Identifiers	Name	Gender/DOB	Address	Rank
<input type="checkbox"/> 100000069 ...4321	DEMO, JANE M	F 1942-03-29	123 UNKNOWN LN, RALEIGH NC 27565	16.1

Patient Search [Logout](#)

Recent **Lists** **Relationships**

Relationship:

Name	DOB	Age	Gender	PCP	PCP Phone	
DEMO, JANE M	03/29/42	76	Female	Two Demo	919-763-8087	<input type="button" value="Add"/> <input type="button" value="Refresh"/> <input type="button" value="Remove"/>

Override Consent Policy

Relationships with your patients:

Patients added to "Primary" will by default show up in the "My List" tab.

To add a patient relationship:

- choose a relationship from the pull down
- click the Plus sign to search for and add a Patient.

As with the **Recent Patients** list or additional patient lists you have created, relationship lists contain basic demographic information and allow quick access to messaging about the patient, downloading a patient summary and adding the patient to additional lists (see the [Working Patient Lists](#) section of this user guide). In addition, you may remove a patient from a relationship list by clicking the **✖** icon at the right of the row of patient information.

MESSAGING

The messaging feature of the NC HealthConnex Clinical Portal allows you to send messages to and receive messages from any trusted Health Information Service Provider (HISP) Direct Secure Messaging (DSM) accounts registered with DirectTrust™ and within the NC HealthConnex Provider Directory.

This means you may share encrypted messages containing patient health information with other users within the NC HealthConnex Provider Directory only (not to/from standard e-mail accounts like Gmail or Yahoo).

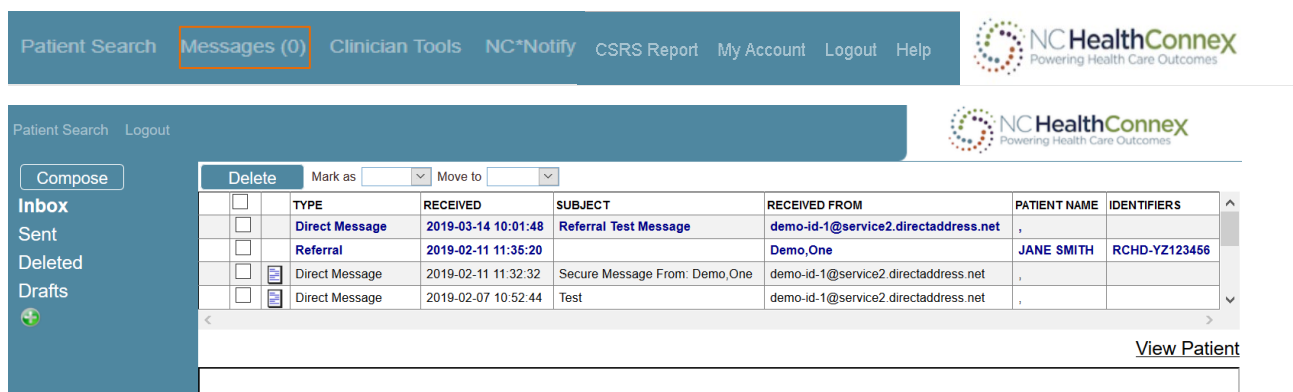
Only users who are associated with a facility that has a NCHIE DSM may access this feature. A NCHIE DSM address will have “nchie.net” as the last part of the domain. For example:

“[firstname.lastname@direct.participantorganization.nchie.net](#)”. If you do not know if your facility has a DSM domain, please ask your Participant Account Administrator.

Messaging Center User Interface

The **Messaging Center** looks much like a standard webmail application, with menu bars to the left and at the top, a list of messages at the middle/center of the screen, and a message viewing pane at the middle/bottom of the screen with **Reply/Reply All/Forward** buttons to the top right of the open message.

To access the **Messaging Center**, click the **Messages** tab from the **Main Menu** or **Patient View Menu** bars, as shown below.

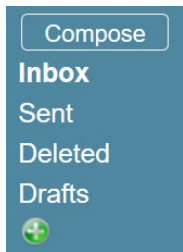



	TYPE	RECEIVED	SUBJECT	RECEIVED FROM	PATIENT NAME	IDENTIFIERS
<input type="checkbox"/>	Direct Message	2019-03-14 10:01:48	Referral Test Message	demo-id-1@service2.directaddress.net	JANE SMITH	RCHD-YZ123456
<input type="checkbox"/>	Referral	2019-02-11 11:35:20		Demo,One		
<input type="checkbox"/>	Direct Message	2019-02-11 11:32:32	Secure Message From: Demo,One	demo-id-1@service2.directaddress.net		
<input type="checkbox"/>	Direct Message	2019-02-07 10:52:44	Test	demo-id-1@service2.directaddress.net		

A message row appears in **bolded blue text** when its contents are unviewed and un-bolded black text once viewed.

Messaging Menus

Two menus appear in the Messaging Center, at the left and the top of the screen. These menus display your folders for storing and organizing messages and allow you to take actions off messages (such as moving or deleting messages), respectively. These menus and their contents/functions are shown below.



The menu bar at the left of the screen allows you to **compose** a new message; view and work with messages in the **Inbox**, **Sent**, **Deleted**, and **Drafts** folders; or **add a folder** using the **green plus sign icon**. 



The menu bar at the top of the screen allows you to **delete** a message, **mark a message** (read or unread) from the drop-down menu, or **move a message** (to any standard or customized folder). To do this, you must first select one or multiple messages from the list by clicking its checkbox.

Working with Folders

Folders enable you to manage your mailbox and organize messages so you can find them easily. There are two types of folders: standard **system folders** and **user-defined folders**.


The standard **system folders** may not be moved, renamed or deleted. These folders are always displayed at the top of the list of folders, and include the following:

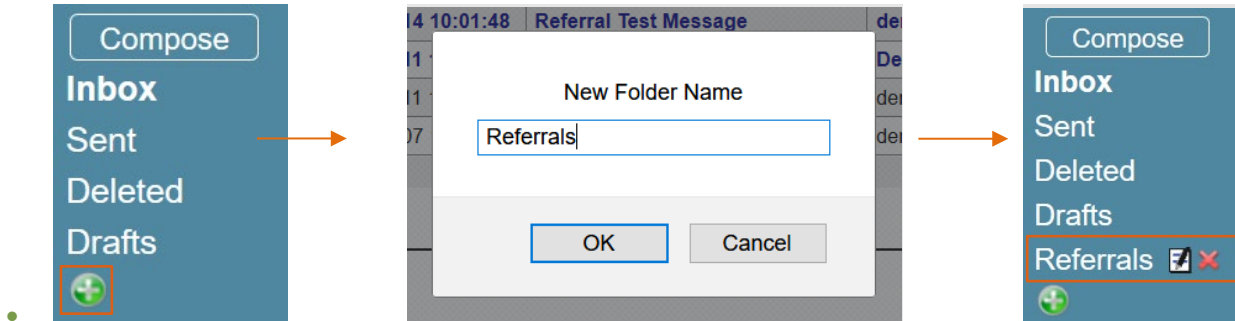
- **Inbox:** this is the default folder displayed when the Messaging Center is opened and shows all received messages that have not been deleted or moved to another folder.
- **Sent:** this folder contains copies of all messages you have sent, listed in reverse chronological order (most recent at the top).
- **Deleted:** this folder contains all messages you have deleted, listed in reverse chronological order (most recent at the top). Deleted messages remain in this folder until you select and delete the message permanently from this folder (and confirm the action in a pop-up window), after which point the message cannot be restored.
- **Drafts:** this folder contains any draft/unsent messages you have saved. Any type of message may be saved as a draft, whether it is a new message, a forward, a reply, or a reply all message.



In addition to the standard **system folders**, you may create and name your own folders for storing and organizing messages. An example of a **user-defined folder** may be “Referrals,” to store messages about patients referred to other providers, or “High-Risk,” to store messages about a provider’s high-risk patients. These **user-defined folders** appear below the list of **standard folders** in alphabetical order.

Note that a folder name is **bolded** when its contents are being displayed to the right.

An example of a user-defined folder may be “Referrals,” to store messages about patients referred to other providers.

To create a new user-defined folder, click the **green plus sign icon**  below the standard **system folders** and enter the desired folder name as prompted in the pop-up window. Click **Ok** and the new folder will appear in alphabetical order within the list of **user-defined folders**, as shown below.



To rename or delete a user-defined folder, click the  and  icons, respectively, to the right of the folder name (see above right screenshot). Any contents of deleted folders will be moved to the **Deleted** folder; if there are messages you wish to save, you should move them from the **Deleted** folder to another folder.

Working with Messages

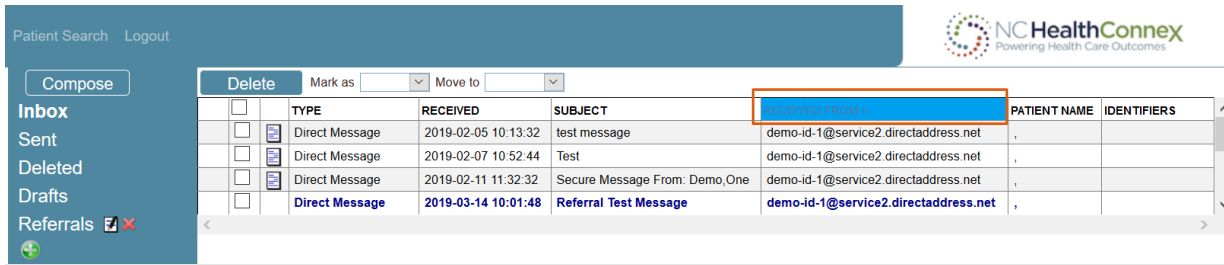
Sorting Messages

Messages within a folder may be sorted by clicking on their header titles. This will sort messages by date/time (**Received** column, with most recent first), subject name (**Subject** column, alphabetically), sender (**Received From** column, alphabetically), patient name (**Patient Name** column, alphabetically) or identifier (**Identifier** column, numerically). Clicking on the header a second time will sort the messages in the reverse order.

For example, to sort messages by date/time with the *most recent* messages at the top, click **Received** once, as shown below.

TYPE	RECEIVED	SUBJECT	RECEIVED FROM	PATIENT NAME	IDENTIFIERS
Direct Message	2019-02-05 10:13:32	test message	demo-id-1@service2.directaddress.net		
Referral	2019-02-05 16:31:36	Referral - test	Demo,One	JANE SMITH	RCHD-YZ123456
ADT/Demographics	2019-02-06 08:42:33	Test	Demo,One	JANE SMITH	RCHD-YZ123456
Billing/DX/Proc	2019-02-06 08:50:23	Test	Demo,One	JANE SMITH	RCHD-YZ123456

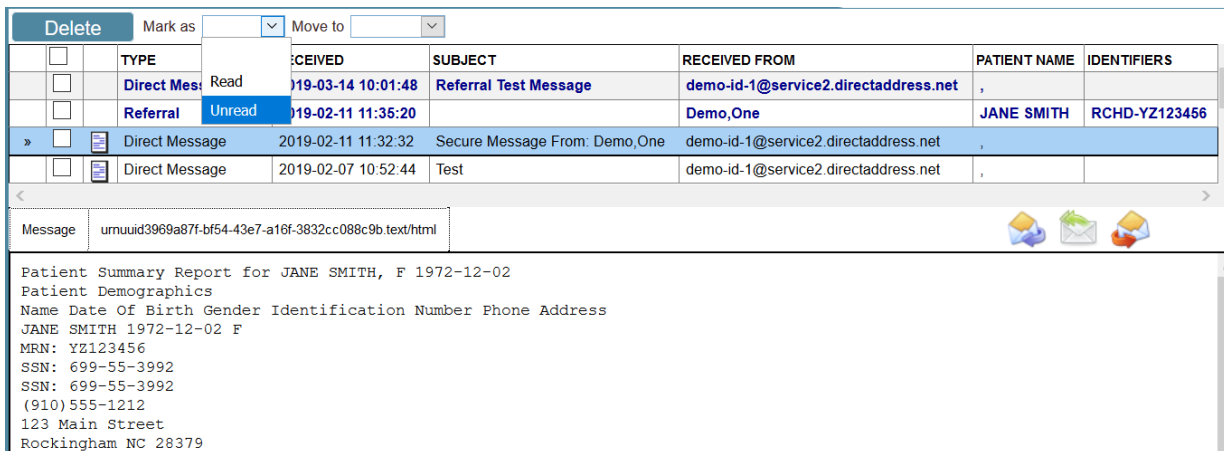
As another example, to sort messages by sender, in *reverse alphabetical order*, click **Received From** twice, as shown below.



Marking and Moving Messages

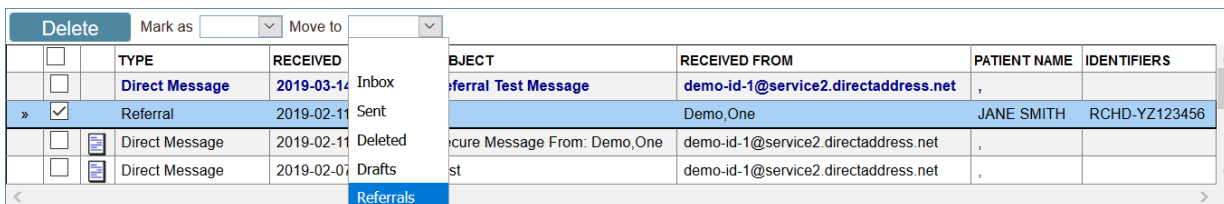
For better organization and usability, messages within any folder may be marked as **Read** or **Unread**, and moved from the **Inbox** to another folder or between folders.

To mark a message **Read** or **Unread**, select the message by clicking the empty checkbox at the left of the message row, and select **Read** or **Unread** from the **Mark as** drop-down menu in the top menu bar, as shown below.



Once this action is taken, the message row will appear **bolded** (if marked **Unread**) or un-bolded (if marked **Read**).

To move a message between folders, select the message by clicking the empty checkbox at the left of the message row, and select the folder to which the message should be moved from the **Move to** drop-down menu in the top menu bar, as shown below.



Multiple messages may be marked or moved at once by checking all the desired messages' boxes at the left of the message row, and then taking the action to mark or move, as described.

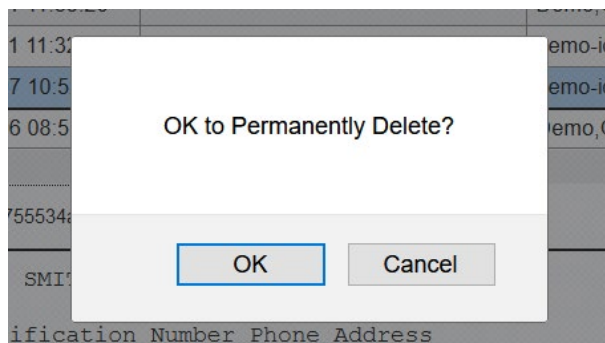
Deleting Messages

Messages may be deleted from any folder by clicking the empty checkbox at the left of the message row, then clicking the **Delete** button in the top menu bar, as shown below.

Delete						
Mark as <input type="text"/>		Move to <input type="text"/>				
<input type="checkbox"/>	TYPE	RECEIVED	SUBJECT	RECEIVED FROM	PATIENT NAME	IDENTIFIERS
<input type="checkbox"/>	Direct Message	2019-03-14 10:01:48	Referral Test Message	demo-id-1@service2.directaddress.net		
<input type="checkbox"/>	Referral	2019-02-11 11:35:20		Demo,One	JANE SMITH	RCHD-YZ123456
<input type="checkbox"/>	Direct Message	2019-02-11 11:32:32	Secure Message From: Demo,One	demo-id-1@service2.directaddress.net		
<input checked="" type="checkbox"/>	Direct Message	2019-02-07 10:52:44	Test	demo-id-1@service2.directaddress.net		

Note that multiple messages may be deleted at once by selecting all desired message checkboxes at the left of the message row, and then clicking **Delete**, as described above.

To permanently delete a message, you should select the message within the **Deleted** folder by clicking the empty checkbox at the left of the message row and clicking the **Delete** button in the top menu bar. This action will prompt a pop-up window asking you to confirm you would like to permanently delete the message. By clicking **Ok**, you agree to permanently delete the message, after which point the message cannot be restored.



Receiving and Viewing Messages and Attachments

You will receive new incoming messages in your **Inbox**, the default folder upon entering the **Messaging Center** that displays a list of messages at the middle/center of the screen, and a message viewing pane at the middle/bottom of the screen.

New, unread messages will display as **bolded** in the list. Once you click on any part of the message row, the text in the row will be un-bolded, indicating the message has been opened, and the message body text, message delivery information, and/or attachment details will appear in the message viewing pane below the messages list. Please note that XML attachments must be viewed within the message on a separate tab and cannot be downloaded directly.

If a patient report is attached, you may toggle between the message body text itself (if any) and the patient report by using the tabs above the message viewing pane and below the messages list, as shown below.

Mark as Move to

<input type="checkbox"/>	<input type="checkbox"/>	TYPE	RECEIVED	SUBJECT	RECEIVED FROM	PATIENT NAME	IDENTIFIERS
<input type="checkbox"/>	<input type="checkbox"/>	Direct Message	2019-03-14 10:01:48	Referral Test Message	demo-id-1@service2.directaddress.net	,	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Direct Message	2019-02-11 11:32:32	Secure Message From: Demo,One	demo-id-1@service2.directaddress.net	,	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Direct Message	2019-02-07 10:52:44	Test	demo-id-1@service2.directaddress.net	,	
<input type="checkbox"/>	<input type="checkbox"/>	ADT/Demographics	2019-02-06 08:42:33	Test	Demo,One	JANE SMITH	RCHD-YZ123456

Message

Patient Summary Report for JANE SMITH, F 1972-12-02
Patient Demographics
 Name Date Of Birth Gender Identification Number Phone Address
 JANE SMITH 1972-12-02 F
 MRN: YZ123456
 SSN: 699-55-3992
 SSN: 699-55-3992
 (910)555-1212
 123 Main Street
 Rockingham NC 28379

Allergies
 Onset Date Inactive Date Allergen Category Last Updated At
 2015-12-04 Rocephin Allergy RCHD
Medications
 Date Medication Form Strength Duration Source
 2018-01-24 1 2 days Richmond County Health Department
 2018-01-19 1 7 days Richmond County Health Department

Mark as Move to

<input type="checkbox"/>	<input type="checkbox"/>	TYPE	RECEIVED	SUBJECT	RECEIVED FROM	PATIENT NAME	IDENTIFIERS
<input type="checkbox"/>	<input type="checkbox"/>	Direct Message	2019-03-14 10:01:48	Referral Test Message	demo-id-1@service2.directaddress.net	,	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Direct Message	2019-02-11 11:32:32	Secure Message From: Demo,One	demo-id-1@service2.directaddress.net	,	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Direct Message	2019-02-07 10:52:44	Test	demo-id-1@service2.directaddress.net	,	
<input type="checkbox"/>	<input type="checkbox"/>	ADT/Demographics	2019-02-06 08:42:33	Test	Demo,One	JANE SMITH	RCHD-YZ123456

Message

Patient Summary Report for JANE SMITH, F 1972-12-02
Patient Demographics

Name	Date Of Birth	Gender	Identification Number	Phone	Address
JANE SMITH	1972-12-02	F	MRN: YZ123456 SSN: 699-55-3992 SSN: 699-55-3992	(910)555-1212	123 Main Street Rockingham NC 28379

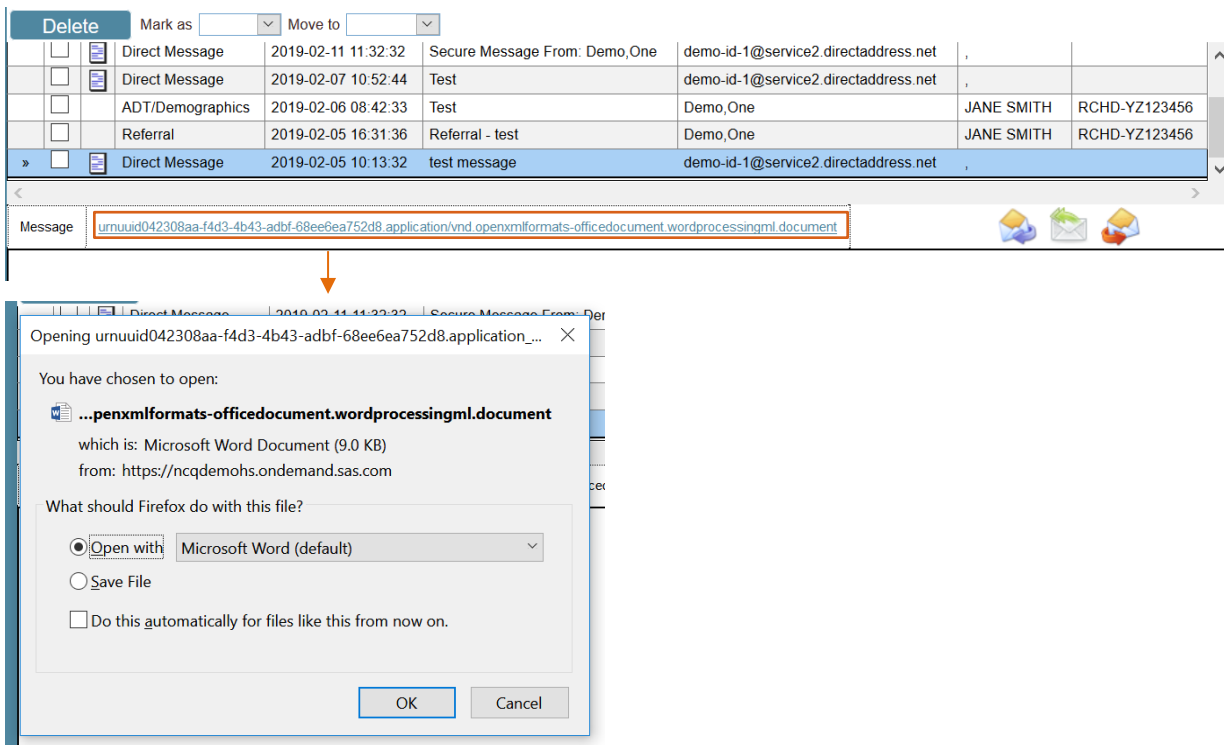
Allergies

Onset Date	Inactive Date	Allergen	Category	Last Updated At
2015-12-04		Rocephin	Allergy	RCHD

Medications

Date	Medication	Form	Strength	Duration	Source
2018-01-24			1	2 days	Richmond County Health Department
2018-01-19			1	7 days	Richmond County Health Department

If another type of document is attached from a sender's local computer, clicking on the hyperlinked document name will open a new pop-up window asking you to open or save the file, as shown below.



Composing Messages

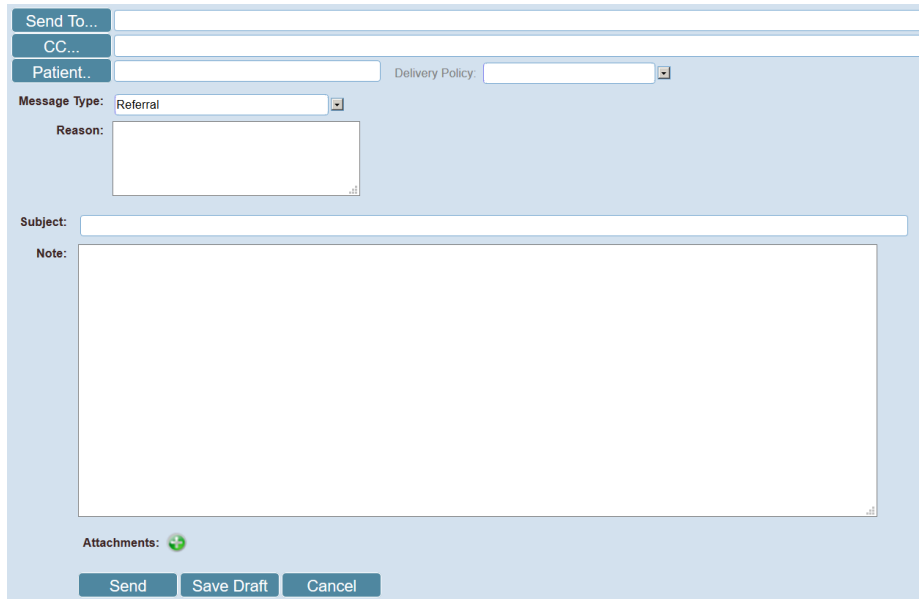
You may compose a new message from the **Messaging Center**, the **View Summary** page, or from a patient list within **Clinician Tools**.

If you wish to attach a patient report from the Clinical Portal to a message, you should initiate the message from the **View Summary** page or from a patient list within **Clinician Tools**. See the [Attaching Patient Information to a Message](#) section of this user guide below for more information.

To compose a new message from the **Messaging Center**, you will take the following steps.

Step 1

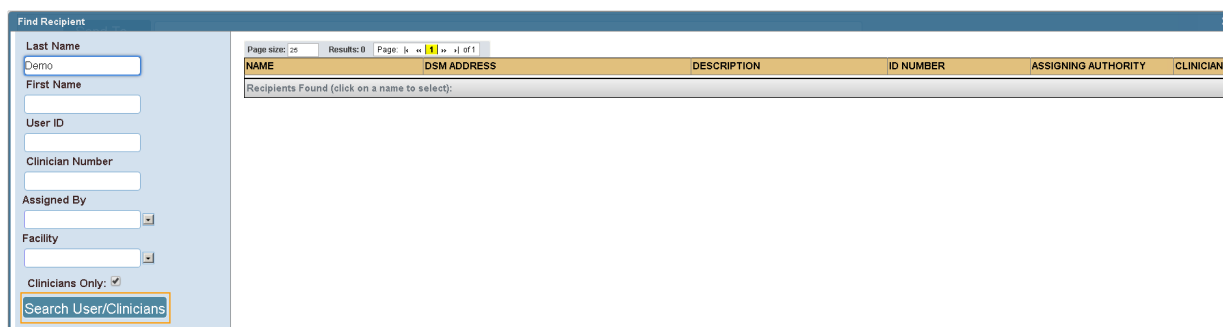
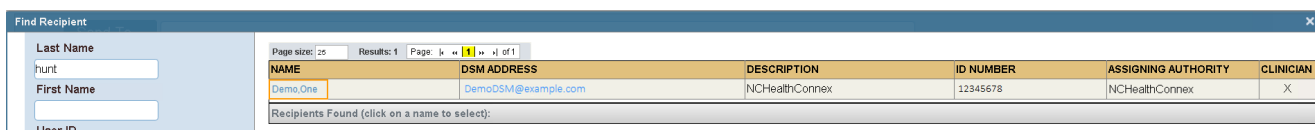
Click the **Compose** button at the top of the left menu bar, and a new message pop-up window will appear, as shown below.



Step 2

Enter a recipient into the **Send To...** field by either:

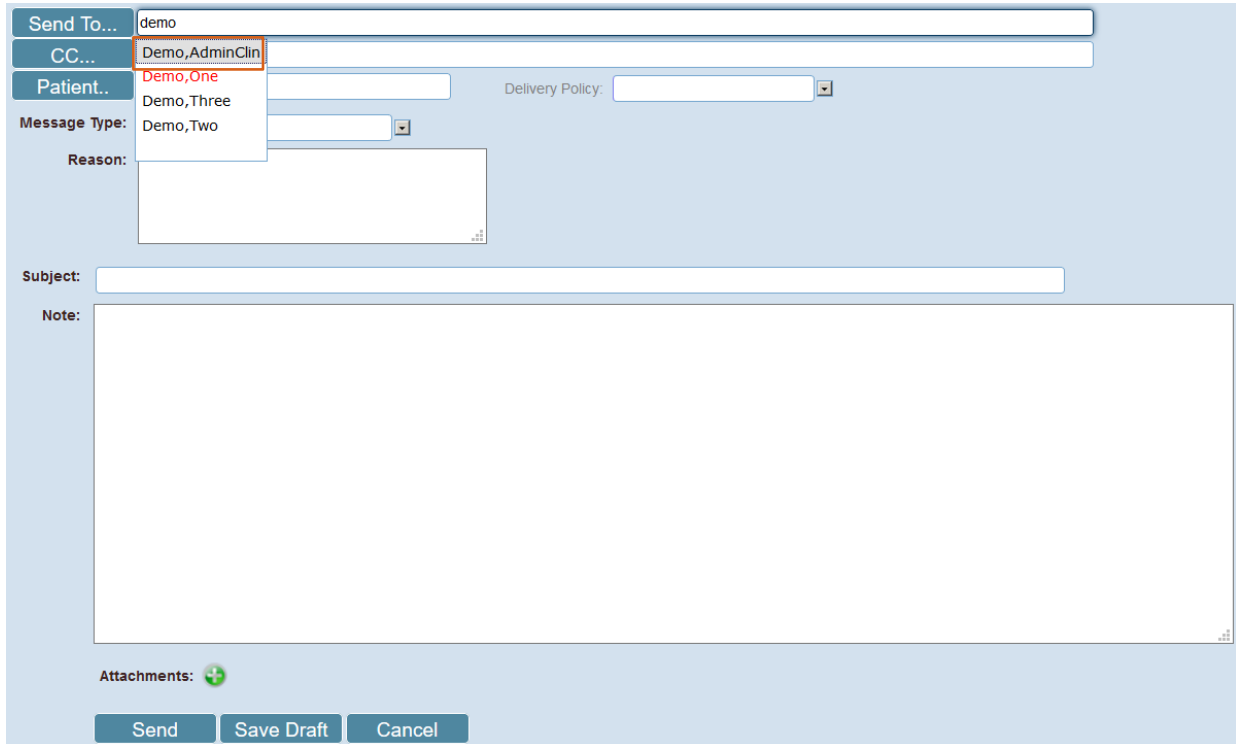
- Searching the Provider Directory. To search for a recipient address, click the **Send To...** button and key in recipient details to at least one of the available fields in the **Find Recipient** window, then select a recipient by clicking on a blue hyperlinked name in the results list, as shown below. Note that each search result will return a name, Clinical Portal user ID, description, ID number and assigning authority, and indication of whether the user is or is not a clinician, as this information is available.

NAME	DSM ADDRESS	DESCRIPTION	ID NUMBER	ASSIGNING AUTHORITY	CLINICIAN
Demo One	DemoDSM@example.com	NCHHealthConnex	12345678	NCHHealthConnex	X

OR

- Typing the recipient's last name into the **Send To...** field (*only available if you have sent a message to the recipient at least once before). To use this quick option, start to type the recipient's last name into the field directly. This action will prompt a drop-down menu directly below the **Send To...** field containing any prior recipient matching name(s), from which you may click on the intended recipient and populate the field, as shown below.



To add additional recipients, repeat the steps above.

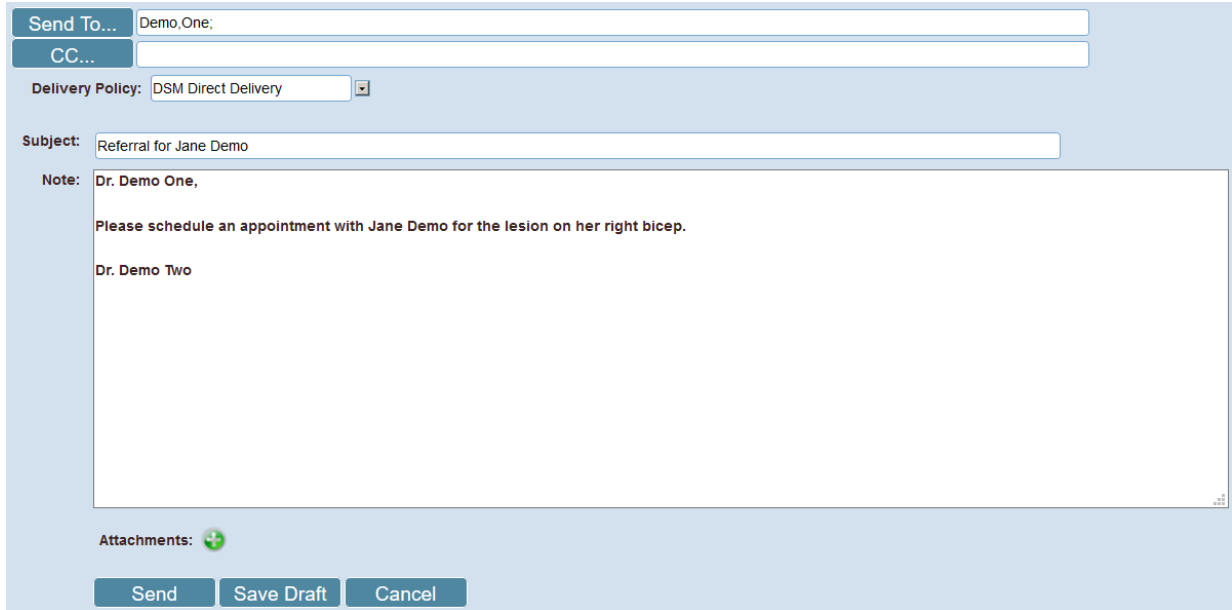
Note that once a recipient is successfully entered into the **Send To...** field, the system recognizes the message as a Direct Secure Message and the **Delivery Policy** field defaults to “DSM Direct Delivery” and may not be changed. In addition, the **Patient**, **Message Type**, and **Reason** fields disappear. As the NC HealthConnex Clinical Portal is configured to send and receive messages only between Direct mailboxes, these additional fields do not apply to users.

Step 3

Enter any additional recipient(s) to be carbon-copied on the message into the **CC...** field by clicking the **CC...** button and repeating either of the bulleted instructions in step 2 above.

Step 4

Type a subject into the **Subject** field and a message into the **Note** field, as shown below. Note, clicking the **Save Draft** button frequently will prevent losing a message mid-composition should the application time out during the drafting process.



The screenshot shows an email composition window with the following fields and content:


- Send To...:** Demo_One;
- CC...:** (empty)
- Delivery Policy:** DSM Direct Delivery
- Subject:** Referral for Jane Demo
- Note:**

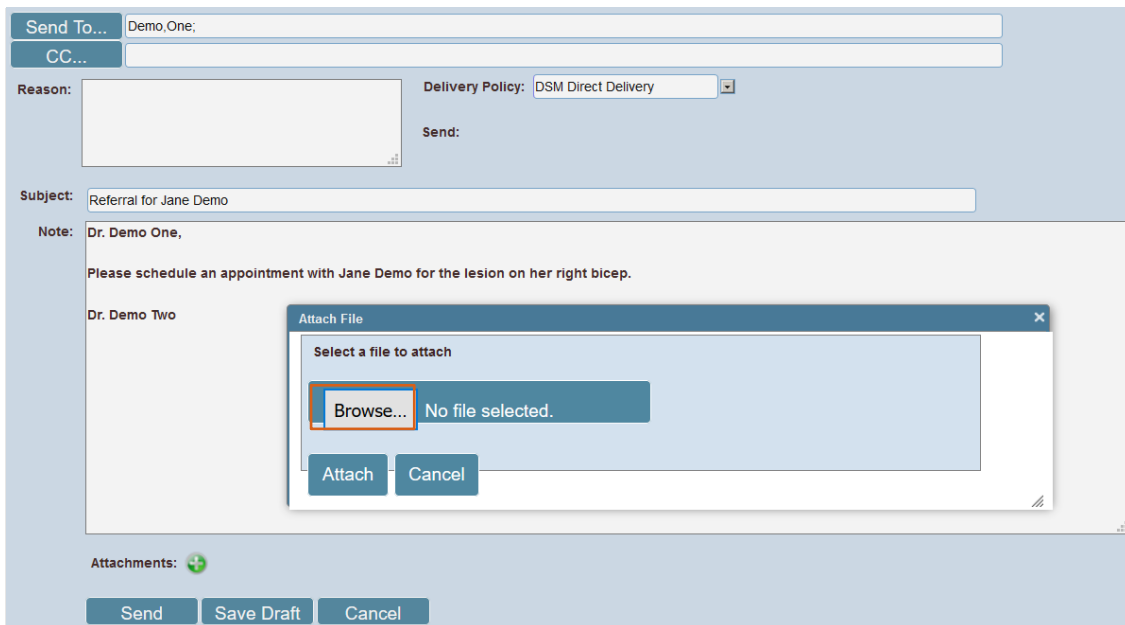
Dr. Demo One,

Please schedule an appointment with Jane Demo for the lesion on her right bicep.

Dr. Demo Two
- Attachments:** (green plus icon)
- Buttons:** Send, Save Draft, Cancel

Step 5

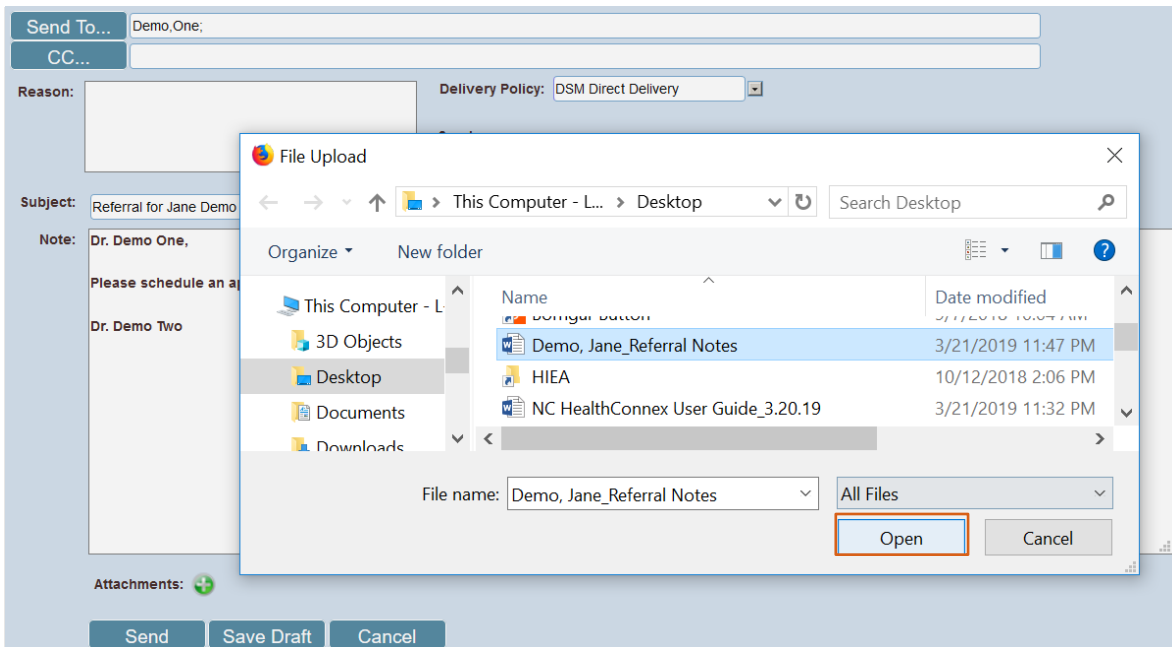
If desired, add an attachment from the computer by first clicking the **green plus sign icon**,  then clicking the **Browse** button in the **Attach File** pop-up window, locate the file from the computer's local folders, and click **Open**, as shown below.



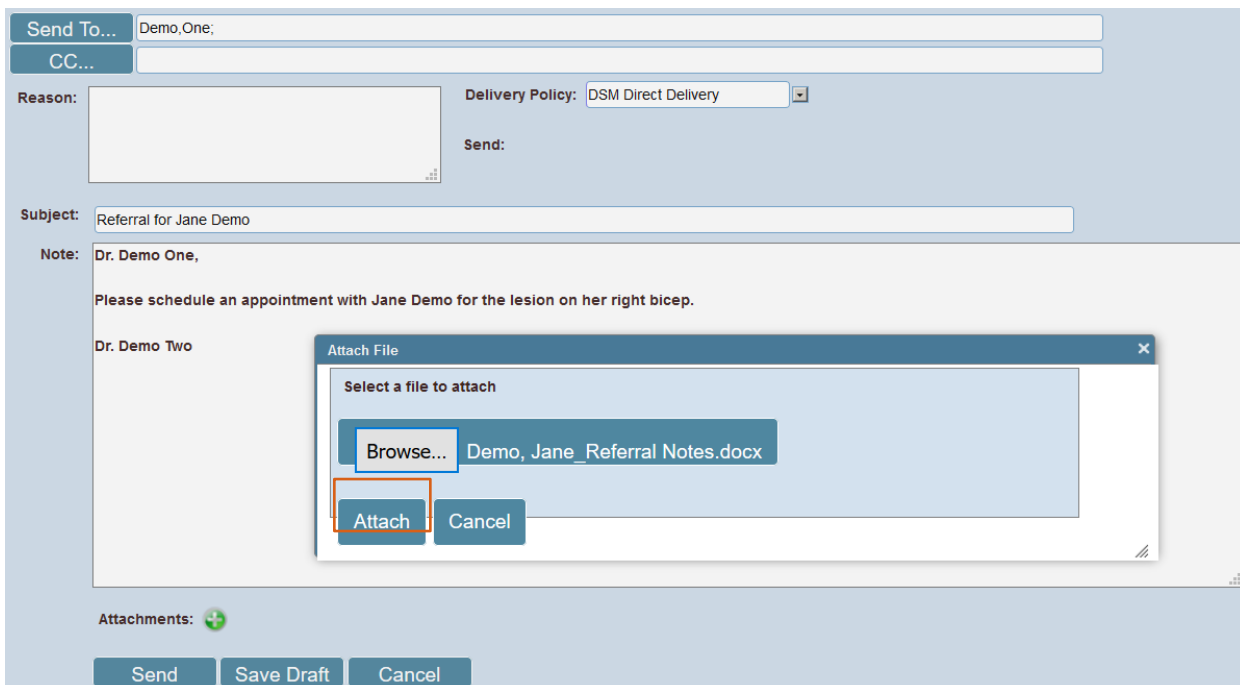
The screenshot shows the same email composition window as in Step 4, but with an **Attach File** pop-up window open over the note field. The pop-up window contains:

- Title:** Attach File
- Text:** Select a file to attach
- Buttons:** Browse... (highlighted with a red box), Attach, Cancel
- Status:** No file selected.

The background email composition fields are partially visible behind the pop-up window.



Finally, click the **Attach** button after confirming the filename above it represents the desired document.



If you select the wrong file or changes your mind, you may click the **Cancel** button or the **X** in the upper right of the **Attach File** window to cancel the attachment process.

Step 6

Once all desired message fields are complete, click the **Send** button to send the message (a copy will be stored in the **Sent** folder), the **Save Draft** button to save it for sending later (a copy will be stored in the **Drafts** folder), or the **Cancel** button to discard the message (a copy will be stored in the **Deleted** folder). Note that once a message has been sent, it cannot be recalled.

Attaching Patient Information to a Message

Should you wish to attach patient information from the Clinical Portal to a message, you should initiate the message from the **View Summary** page (once a patient record has been opened) or from a patient list within **Clinician Tools**.

Initiating a message with a patient report attached from one of these two areas will also allow you to filter the report's contents, select report type and format preferences or default to a recipient's preferences based on your Clinical Portal preference configurations, and preview a copy of the report before sending.

To attach a patient report to a new message from the **View Summary** page, complete the following steps:

Step 1

Select a report format from the **View As** drop-down menu and a report type from the **Report** drop-down menu at the top of the screen, then click **Send**.

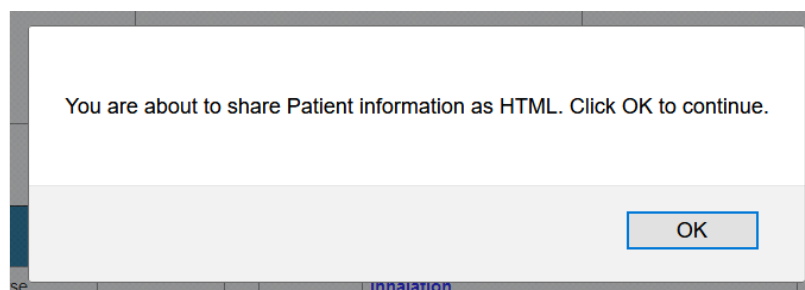


Patient Summary Report for JANE DEMO, F 1942-03-29

Patient Demographics

Step 2

A pop-up window will appear to confirm you is about to send the patient report; click the **Ok** button to continue.



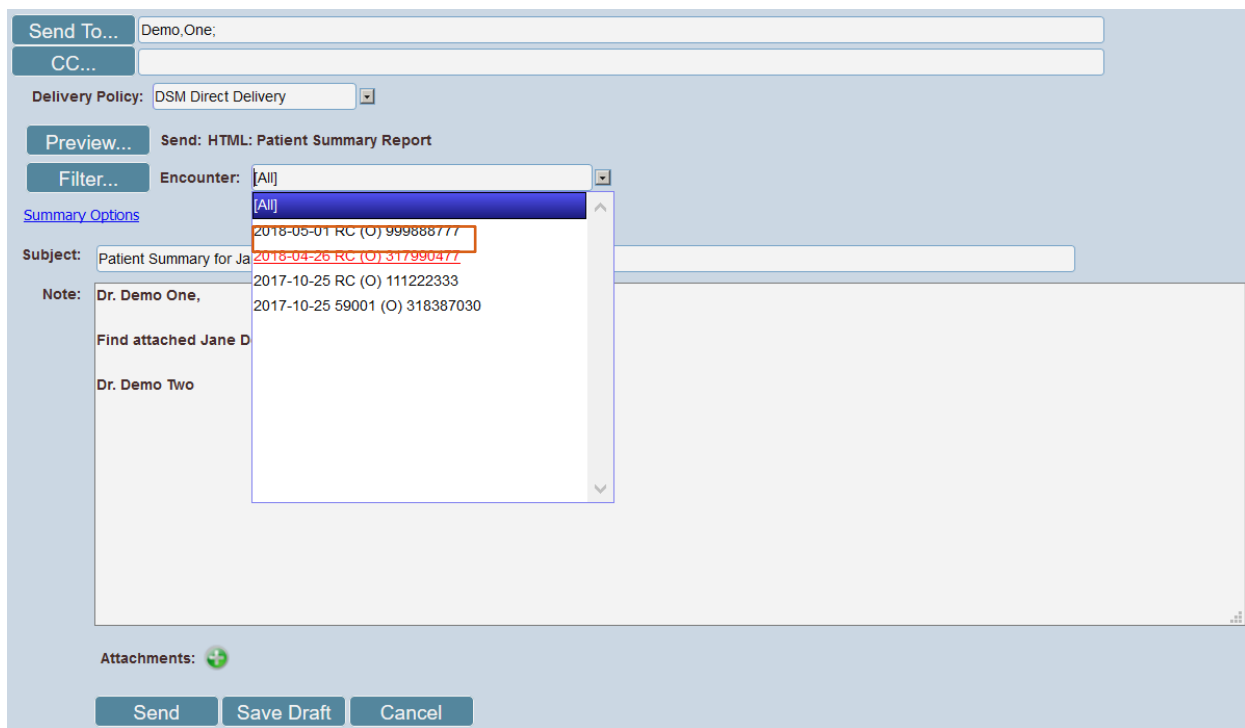
Step 3

A new message window will appear. Complete the basic message fields (**Send To...**, **CC...**, **Subject** and **Note**) and any desired attachments from the local computer by following steps 2-5 in the [Composing Messages](#) section above.

Step 4

If desired, filter the report's contents by one of the following:

- A unique encounter: click the **Encounter** down-down menu and select the desired encounter based on the listed date, facility code, encounter type, and description, as shown below. Note, only one encounter may be selected using this option.



The screenshot shows a message composition window with the following elements:


- Send To...:** Demo,One;
- CC...:** (empty)
- Delivery Policy:** DSM Direct Delivery
- Preview...:** Send: HTML: Patient Summary Report
- Filter...:** Encounter: [All] (dropdown menu is open)
- Summary Options:** (link)
- Subject:** Patient Summary for Ja
- Note:**
 - Dr. Demo One,
 - Find attached Jane D
 - Dr. Demo Two
- Encounter Filter Dropdown:**
 - [All]
 - 2018-05-01 RC (O) 999888777
 - 2018-04-26 RC (O) 317990477
 - 2017-10-25 RC (O) 111222333
 - 2017-10-25 59001 (O) 318387030
- Attachments:** +
- Buttons:** Send, Save Draft, Cancel

- Other parameters, including period of time, data source, and inclusion/exclusion of specific data elements within the clinical categories listed (dependent on the report type): click the **Filter...** button, select the criteria as desired to fully customize the report to a recipient's "need-to-know," and click **Apply Filters**, as shown in the examples below. Use the **Clear All** or **Select All** checkboxes as needed to populate or de-populate all fields in a section.

F 1942-03-29

DEMO, JANE M.

123 UNKNOWN LN, RALEIGH NC 27565



+1 (555) 1331123

Report Filters [Close Window](#)

Filter By Days Back: [-] Filter By Source Clear All Select All

59001 (0)

59

RC

RC (0)

Clear All Select All

Apply Filters


Preview...

- Patient Demographics
- Encounters
- Allergies
- Medications
- Lab Results
- Diagnoses

F 1942-03-29

DEMO, JANE M.

123 UNKNOWN LN, RALEIGH NC 27565



+1 (555) 1331123

Report Filters [Close Window](#)

Filter By Days Back: [+] Filter By Source

Clear All Select All

Apply Filters

Preview...

- Patient Demographics
- Clinical Relationships
- Program Memberships

PROGRAM NAME	INCLUDE
CANCER PATIENTS	<input type="checkbox"/>
TEST PROGRAM	<input type="checkbox"/>

Clear All Select All

- Encounters
- Diagnoses
- Procedures
- History
- AdvanceDirectives
- Appointments
- Alerts
- Allergies
- Vaccinations

Step 5

If desired, select report type and format preferences or default to a recipient's preferences based on your Clinical Portal preference configurations. To do this, click the **Summary Options** blue hyperlink and select the desired options, as shown below.

Send To... Demo,One;

CC...

Delivery Policy: DSM Direct Delivery

Preview... Send: HTML: Patient Summary Report

Filter... Encounter: 2018-04-26 RC (O) 317990477

[Summary Options](#)



Send To... Demo,One;

CC...

Delivery Policy: DSM Direct Delivery

Preview... Send: HTML: Patient Summary Report (Expanded)

Filter... Encounter: 2018-04-26 RC (O) 317990477

Use: My Choice

Send As: Patient Summary (HTML)

Translation: My Choice
Recipient Preference

Report: Patient Summary Report (Expanded)

Subject:

Step 6

If desired, preview the report about to be sent by clicking the **Preview...** button. A pop-up window will appear with the report as customized by the user in steps 4-5 above.

Send To... Demo,One;

CC...

Delivery Policy: DSM Direct Delivery

Preview... Send: HTML: Patient Summary Report (Expanded)

Filter... Encounter: 2018-04-26 RC (O) 317990477

Use: My Choice

Send As: Patient Summary (HTML)

Translation:

Report: Patient Summary Report (Expanded)



Patient Summary Report for JANE DEMO

Patient Demographics

Name	Date Of Birth	Gender	Identification Number	Phone	Address
JANE DEMO	1942-03-29	F	MRN: 999876	+1 (555) 1331123	123 UNKNOWN LN RALEIGH NC 27565

Allergies

Onset Date	Inactive Date	Allergen	Category	Last Updated At
2018-04-12		Vancomycin	Propensity to adverse reactions to drug	RC
2013-09-24		Benzalkonium Chloride	Propensity to adverse reactions	RC
2013-09-24		Warfarin	Propensity to adverse reactions	RC
2011-05-10		Lisinopril	Propensity to adverse reactions	RC
2011-05-10		Sulfa (Sulfonamide Antibiotics)	Propensity to adverse reactions	RC

Alerts

Date	Alert	Type	Status
(none)			

Advance Directives

From Date	To Date	Directive	Type	Status
		Patient has advance directives. For more information, please contact FirstHealth of the Carolinas 155 Memorial Drive PO Box 3000 PINEHURST, NC 28374	Other Directive	Active

Patient-Clinician Relationships

Clinician	Relationship	Group	Group Relationship	Expiration Date
-----------	--------------	-------	--------------------	-----------------

Program Memberships

Program


Step 7

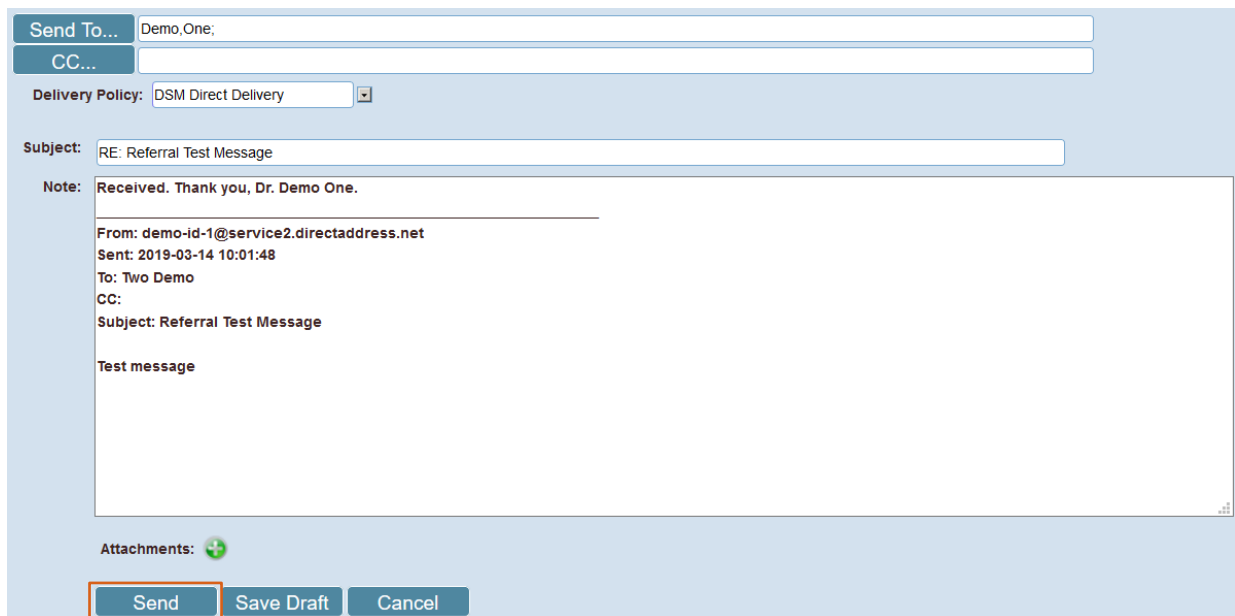
Once all desired message fields and patient information filtering are complete, click the **Send** button to send the message (a copy will be stored in the **Sent** folder), the **Save Draft** button to save it for sending later (a copy will be stored in the **Drafts** folder), or the **Cancel** button to discard the message (a copy will be stored in the **Deleted** folder). Note that once a message has been sent, it cannot be recalled.


Replying to and Forwarding Messages

Once a message within any folder is open in the message viewing pane at the middle/bottom of the screen, you may use the quick action icons at the top right of the pane to reply to a sender, reply to all (if others were copied on the original message), or forward a message to another party. Hovering over each icon will display the associated action (Reply, Reply All, or Forward).



To reply to the sender of a message, click the **Reply** quick action icon.  A new message pop-up window will appear, addressed to the sender, with the original message and sent details in the body of the message, as shown below. Fill in the **Note** field and click **Send**.



To reply to the sender and all other parties copied on the original message, click the **Reply All** quick action icon.  A new message pop-up window will appear with all parties copied and the original message and sent details in the body of the message, as shown below. Fill in the **Note** field and click **Send**.

Send To... Demo,One;

CC... Demo,Three;


Delivery Policy: DSM Direct Delivery

Subject: RE: Referral Test Message

Note: Received. Thank you, Dr. Demo One.


From: demo-id-1@service2.directaddress.net
Sent: 2019-03-14 10:01:48
To: Two Demo
CC:
Subject: Referral Test Message

Test message

Attachments: 

Send Save Draft Cancel

*****Note:** You may receive messages from DSM accounts outside of the NC HealthConnex Provider Directory but may not reply to those messages. This functionality will be available in a future system release.

To forward a message to another party, click the **Forward** quick action icon.  A new message pop-up window will appear with the original message and sent details in the body of the message, as shown below. Fill in the **Send To...**, **CC..** (if applicable) and **Note** fields and click **Send**.

Send To... Demo,Three;

CC...

Delivery Policy: DSM Direct Delivery

Send:

Subject: FW: Referral Test Message


Note: Dr. Demo Three,

Please see attached received from Dr. Demo One. I believe this patient is best suited to you for follow-up.

Dr. Demo Two

From: demo-id-1@service2.directaddress.net
Sent: 2019-03-14 10:01:48
To: Two Demo
CC:
Subject: Referral Test Message

Test message

Attachments: 

Send Save Draft Cancel

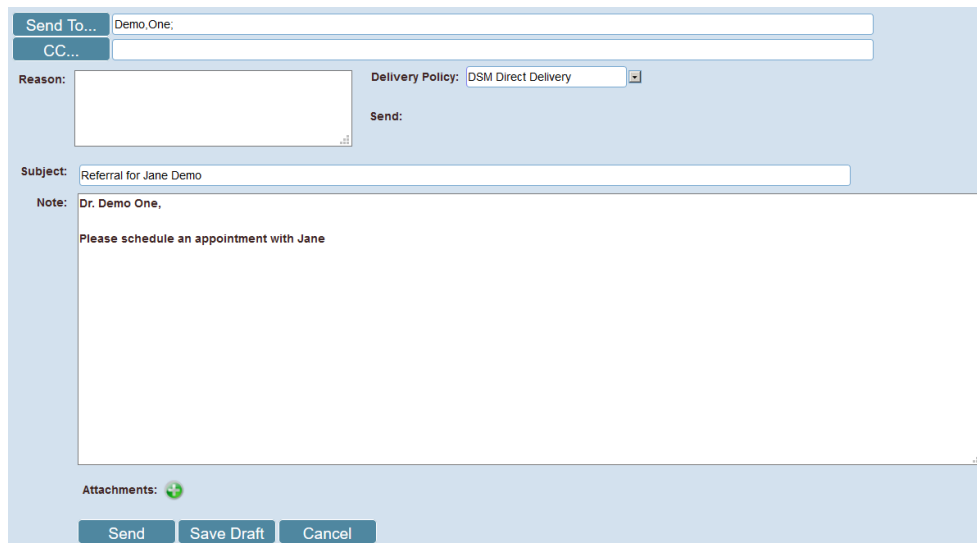
Working with Draft Messages

Draft messages are messages that have been composed, but not yet sent. Drafts may be viewed, edited or sent from the **Drafts** folder tab in the left menu bar.

To edit and/or send a draft message, take the following steps:

Step 1

Open the composed draft from the message list in the **Drafts** folder by double-clicking anywhere in the message details row. This will open the draft message, as shown below.



Step 2

Edit any of the basic message fields (**Send To...**, **CC...**, **Subject** and **Note**) and any desired attachments from the local computer by following steps 2-5 in the [Composing Messages](#) section of this user guide, above. If a patient report is attached, filter, edit summary options, or preview, as desired, by following steps 4-6 in the [Attaching Patient Information to a Message](#) section of this user guide, above.

Step 3

Once all desired message fields and patient information filtering are complete, click the **Send** button to send the message (a copy will be stored in the **Sent** folder), the **Save Draft** button to save it for sending later (a copy will be stored in the **Drafts** folder), or the **Cancel** button to discard the message (a copy will be stored in the **Deleted** folder). Note that once a message has been sent, it cannot be recalled.

***Tip:** clicking the **Save Draft** button frequently will prevent losing a message mid-composition should the application time out during the drafting process.*

TECHNICAL REQUIREMENTS

The NC HealthConnex Clinical Portal is supported on various web browsers and mobile devices, as indicated below.

Browsers

<i>Platform</i>	Chrome	Firefox	Internet Explorer	Microsoft Edge	Opera	Safari
<i>Mac</i>	Supported	Supported	N/A	N/A	Supported	Supported
<i>Windows</i>	Supported	Supported	Not supported	Supported	Supported	Not supported

Mobile Devices*

<i>Platform</i>	Android Browser & WebView	Chrome	Firefox	Microsoft Edge	Safari
<i>Android</i>	Android v5.0+ supported	Supported	Supported	Supported	N/A
<i>iOS</i>	N/A	Supported	Supported	Supported	Supported
<i>Windows 10 Mobile</i>	N/A	N/A	N/A	Supported	N/A

*****Note:** The Clinical Portal is generally supported on the latest version of each major platform's default browser. To ensure the latest version is installed, check the [Help>About Menu](#) on your browser for information on whether the browser is up to date, or see options to download the latest version. If unsure, contact your organization's system administrator.

Proxy browsers (e.g., Opera Mini, Opera Mobile's Turbo mode, UC Browser Mini, Amazon Silk, etc.) are not supported.

HELP DESK

SAS® HIE Technical Support Communication Processes

All Participants of the NC Health Information Exchange Authority (NC HIEA) should designate one or two **Participant Account Administrators (PAAs)** for their organization who will have authority to utilize the SAS® HIE Technical Support Team and Help Desk.

PAAs should communicate their name and contact information to the SAS® HIE Technical Support Team at HIEmail@sas.com, as well as future changes in administration so that contact information is kept up to date.

All end users from an organization should communicate any questions about usage of the Clinical Portal to their organization's PAA(s). The PAA(s) should first try to answer the questions for their end users. If the PAA(s) is unable to answer the question or has discovered an issue with the application, they should then direct questions, themselves, to the SAS® HIE Technical Support Team on behalf of their end users using one of four contact options as detailed in the Participant Account Administrator Reference Guide, available in the [Training & Tools section of the NC HIEA website](#).

USER GUIDE CONTENT DISCLAIMER

The screenshots and presentations herein are intended as examples only and may differ from the actual screenshots and presentations generated by the released product in commercial production.

PARTNERS

SAS Institute

The NC HIEA's technical partner for delivering NC HealthConnex is SAS Institute.

Through innovative analytics, business intelligence and data management software and services, SAS helps customers at more than 80,000 sites make better decisions faster. Its world headquarters are based in Cary, North Carolina. SAS also operates the NC HIEA Technical Support Help Desk. For more information, visit [SAS.com](https://www.sas.com).

InterSystems and J2 Interactive

The NC HealthConnex HIE Platform is powered by the InterSystems HealthShare product, and J2 Interactive is InterSystems' integration partner.

InterSystems is the engine behind many important applications in health care, finance, government, and other sectors where lives and livelihoods are at stake. Founded in 1978, InterSystems is a privately held company headquartered in Cambridge, Massachusetts (USA), with offices worldwide, and its software products are used daily by millions of people in more than 80 countries. For more information, visit [InterSystems.com](https://www.intersystems.com).

J2 Interactive is an award-winning software development and IT consulting firm specializing in customized solutions for hospitals, labs, research institutions, and health information exchanges. For more information, visit [J2Interactive.com](https://www.j2interactive.com).

Secure Exchange Solutions (SES)

NC HealthConnex Direct Secure Messaging is powered by Secure Exchange Solutions (SES).

SES sets the standard for seamless, scalable, secure connectivity across organizational boundaries. As an industry-leading health information technology provider, SES protects, streamlines and delivers sensitive and critical health care information while ensuring compliance and improving efficiency and quality. Hospitals, health systems, physicians, health plans and channel partners rely on SES for integrated secure communications that expand their reach and empower them to improve patient care. SES is a committed member of DirectTrust, helping healthcare stakeholders leverage standards-based communications to communicate across organizational boundaries. For more information, visit SecureExSolutions.com.

DirectTrust

NC HealthConnex, in connection with SES, is part of the DirectTrust nationwide network.

DirectTrust is a collaborative non-profit association of 121 health IT and health care provider organizations to support secure, interoperable health information exchange via the Direct message protocols. DirectTrust has created a “trust framework” that makes it easy for health care professionals, health IT vendors and their patients/customers to communicate securely, with identity proofing and regardless of end-user application. Over 300 EHR and personal health record (PHR) vendors’ products, and over 50 HIEs, participate in the DirectTrust network, ensuring interoperability and security via Direct for exchange of health information to more than half the professionals in the U.S. health care system. For more information, visit DirectTrust.org.

North Carolina Department of Health and Human Services (NCDHHS)

The NC HIEA works closely with NCDHHS to support Medicaid and public health efficiencies.

The North Carolina Department of Health and Human Services (NCDHHS) manages the delivery of health- and human-related services for all North Carolinians, especially our most vulnerable citizens – children, elderly, disabled and low-income families. The Department works closely with health care professionals, community leaders and advocacy groups; local, state and federal entities; and many other stakeholders to make this happen. The Department is divided into 30 divisions and offices. NCDHHS divisions and offices fall under four broad service areas - health, human services, administrative, and support functions. NCDHHS also oversees 14 facilities: developmental centers, neuro-medical treatment centers, psychiatric hospitals, alcohol and drug abuse treatment centers, and two residential programs for children. For more information, visit NCDHHS.gov.