NC HEALTHCONNEX
CLINICAL PORTAL

NC*NOTIFY
QUICK REFERENCE GUIDE

NCNotify
Event Notifications Powered by
NC HealthConnex

NORTH CAROLINA

HEALTH INFORMATION EXCHANGE AUTHORITY (NC HIEA)

ACCESSING NC*NOTIFY IN THE NC HEALTHCONNEX CLINICAL PORTAL

Full participants who have enrolled in the NC*Notify V3 service will find the NC*Notify event notification and care coordination tool within the NC HealthConnex portal. This tool will provide participants with a dashboard-like view of patient activity through event notifications. See below for more details about how to access NC*Notify event notifications.

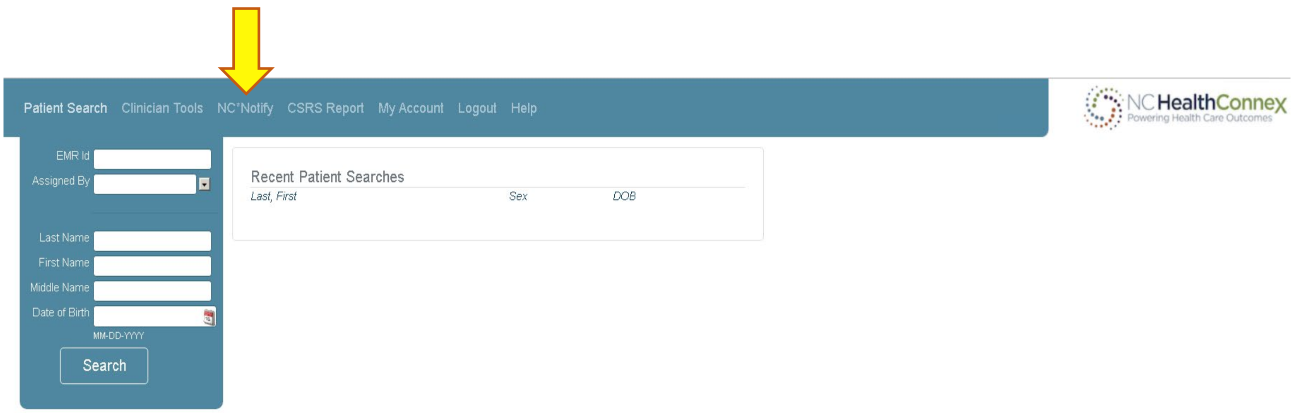
*Patient data in this guide is from our demo environment. No real patient data is displayed.

*Note: Cookies must be enabled within the browser to view notifications.

Viewing Notifications

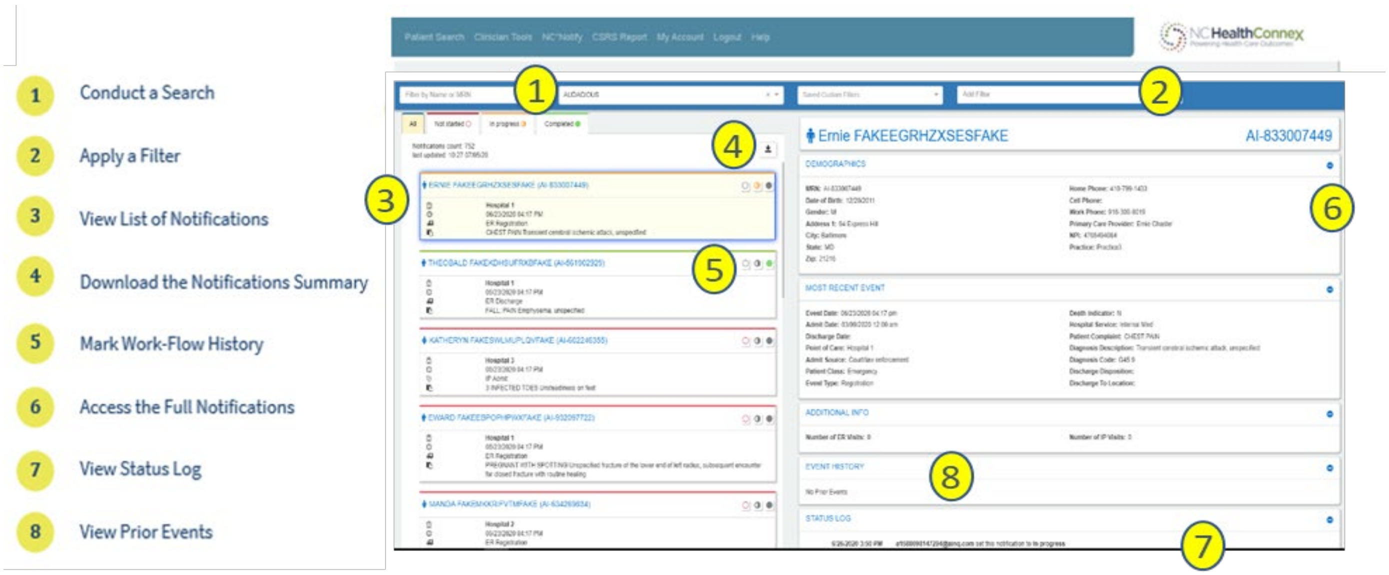
Log in to the clinical portal at https://portal.nchealthconnex.net using your assigned credentials.

To conduct a search or find a list of your organization’s notifications, click the NC*Notify menu item near the top of your screen.



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

A user 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 a user prefers to search for the MRN of the source facility (i.e., where the event took place), he/she 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 a user has access to more than one participant's notification panels (i.e., if he/she has submitted more than one patient panel), he/she can click the Participant drop-down to see notifications from a single panel or all panels combined. Additionally, a user 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 the user to apply specific search criteria to the notifications view. For example, a user 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
- The 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 the user 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 Work-flow Status

The NC*Notify dashboard within the clinical portal has three basic work-flow statuses (Not Started, In Progress, and Completed) to allow users 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 taken by users 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 the Participant goes 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.

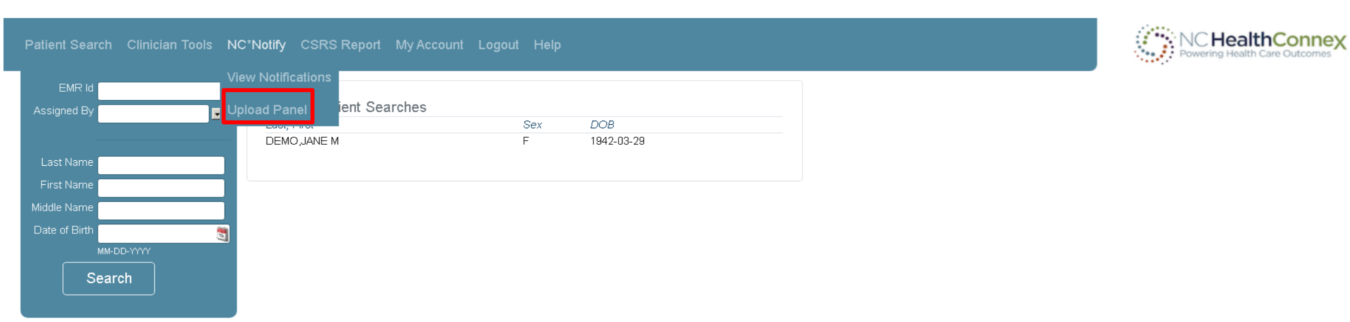
UPLOADING A PATIENT PANEL IN NC HEALTHCONNEX CLINICAL PORTAL

What is Self Service Panel Loader?

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

Step 1

- Hover over NC*Notify on the menu bar.
- Click Upload Panel.

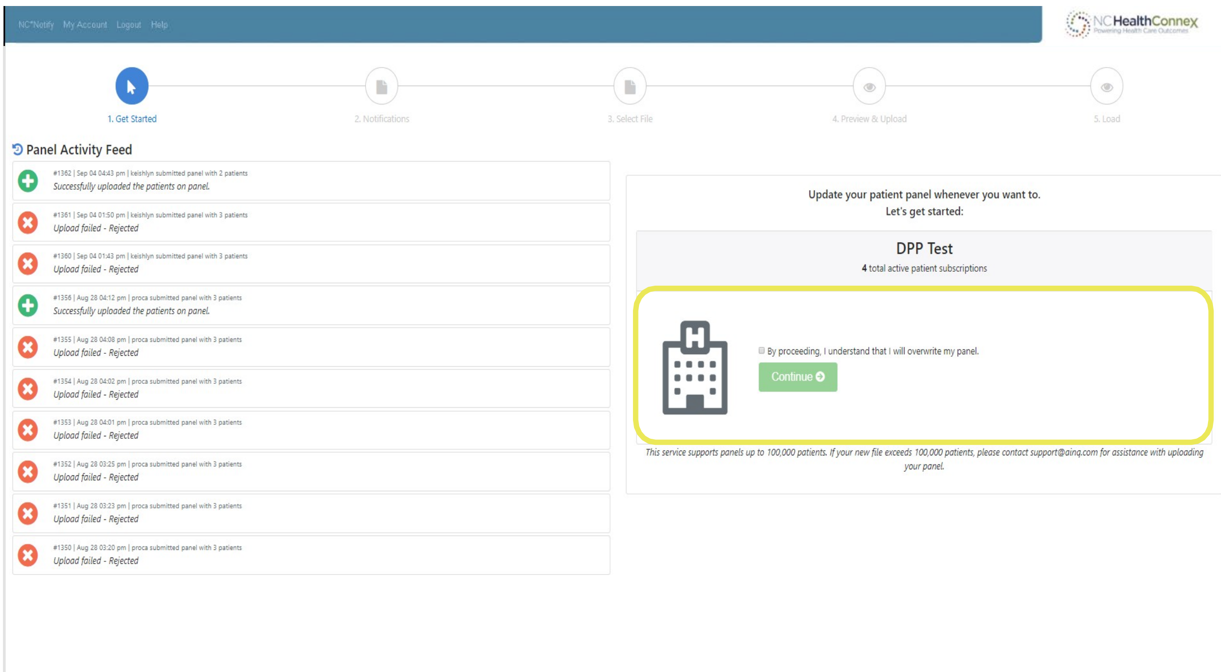


On the default screen you will noticed:

- 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.

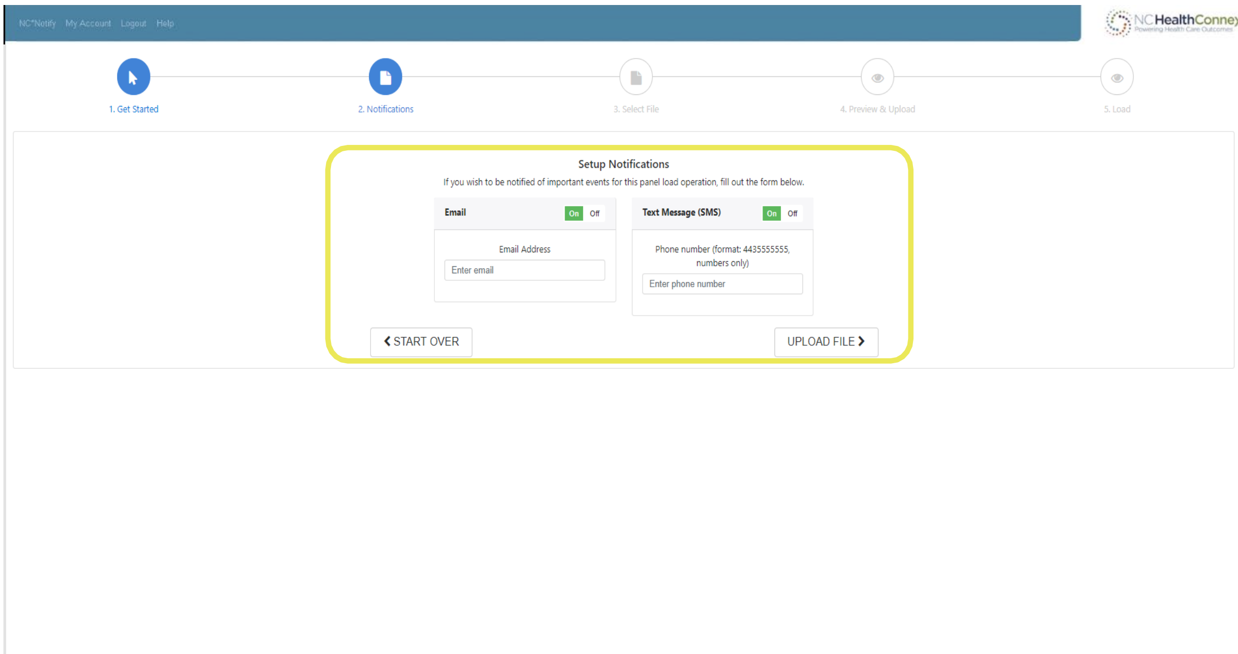
To proceed with uploading your panel, click the check box (By proceeding, I understand that I will overwrite my panel) and click Continue.



Step 2

Push Notifications- Turn on the email or text notification to be notified once panel loading is completed.

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 all 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

File must be saved as:

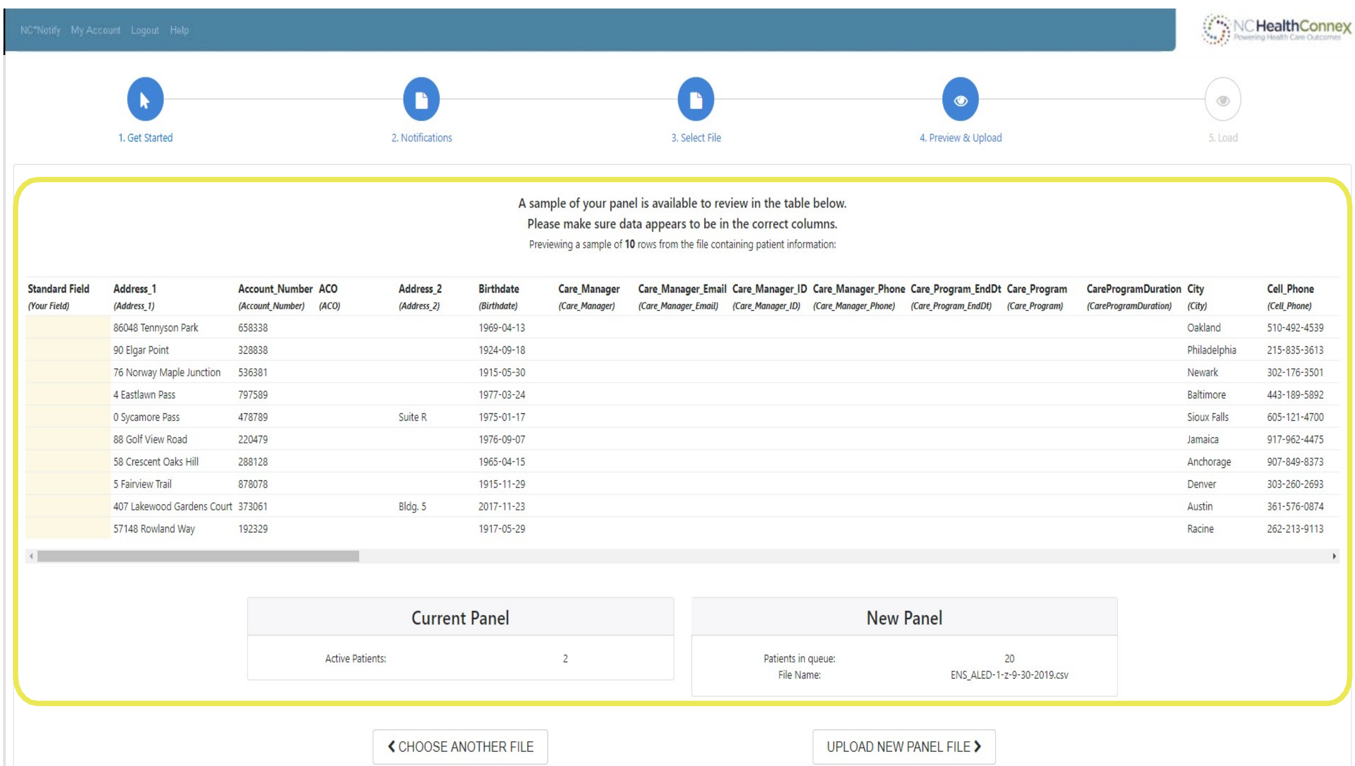
- .CSV prior to uploading

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.

Then click on upload new file.

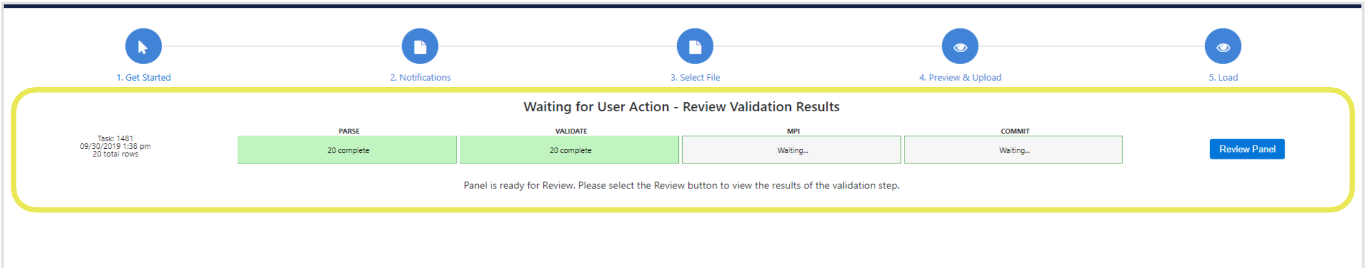


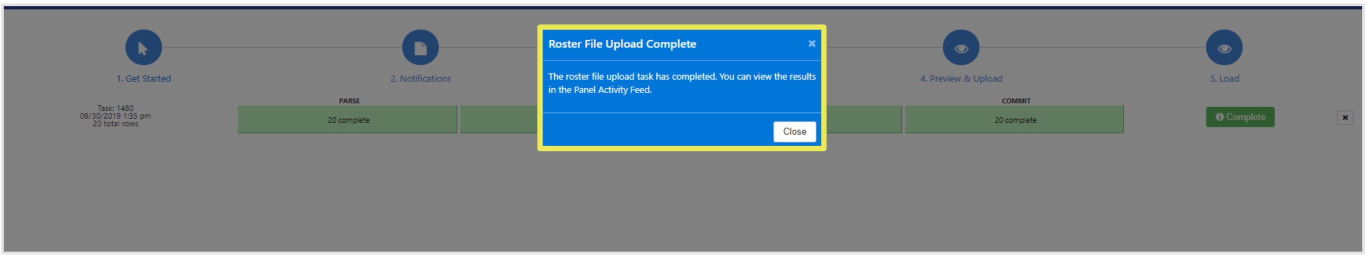
Step 5

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.





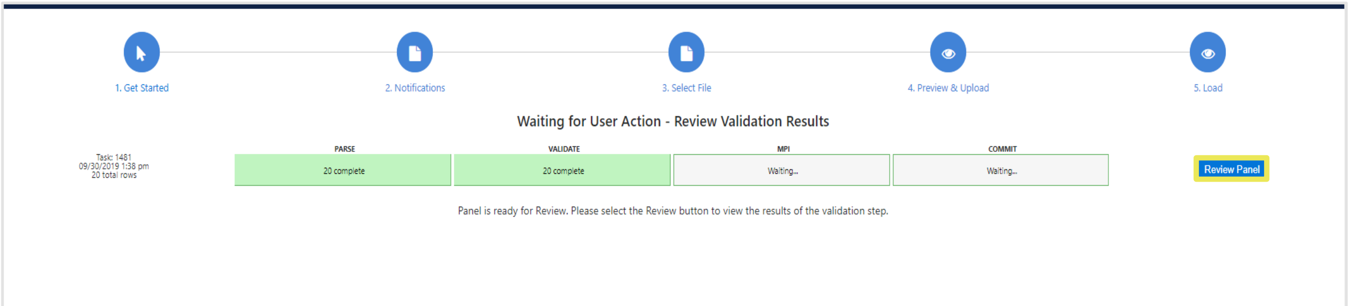
Panel Size	Average Upload Time
80 - 120 patients	8 minutes
900 - 1,100 patients	18 minutes
7,000 - 14,000 patients	25 minutes
95,000 - 105,000 patients	1hr 27 minutes

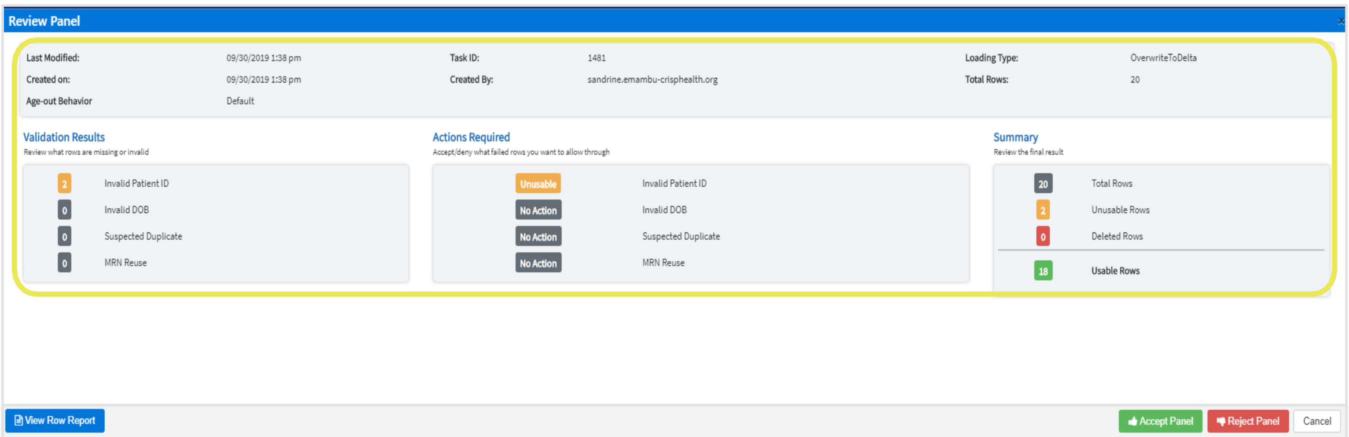
Step 6

Review Panel: Some panels may require additional review prior to upload completion.

To review click the “Review Panel” button.

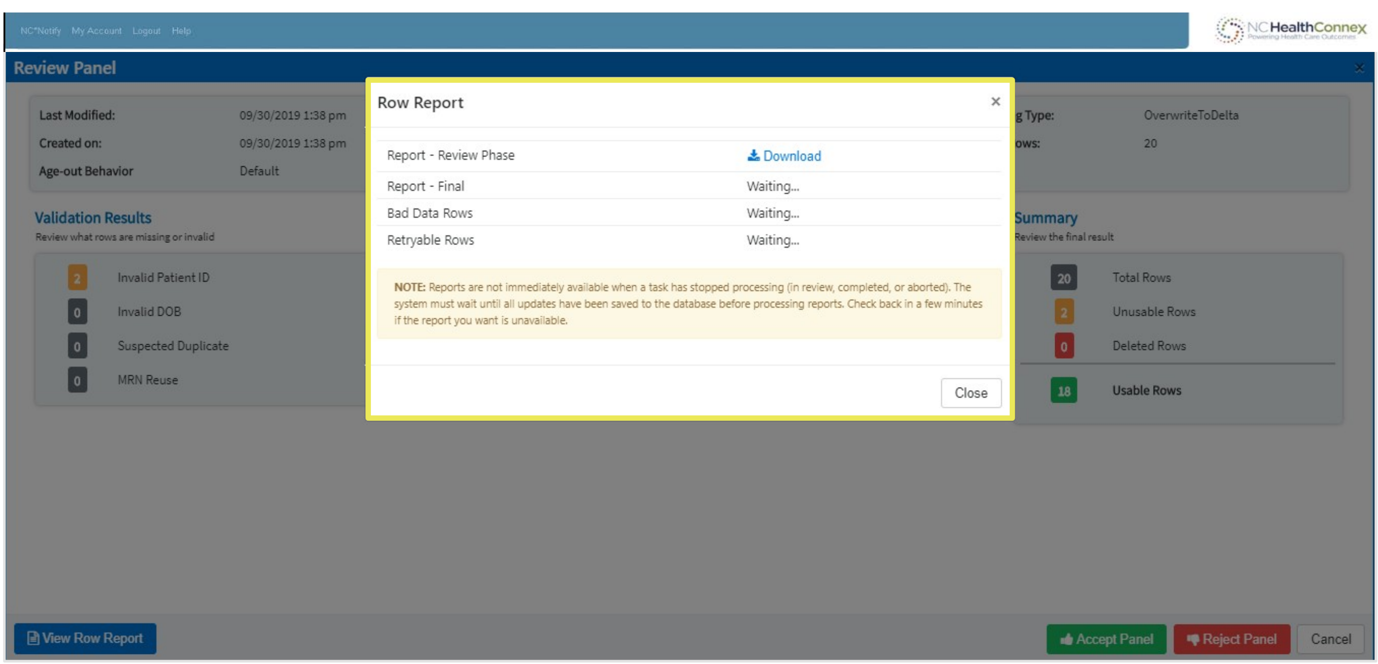
The review button will show the number of rows that must be reviewed.





Step 7

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

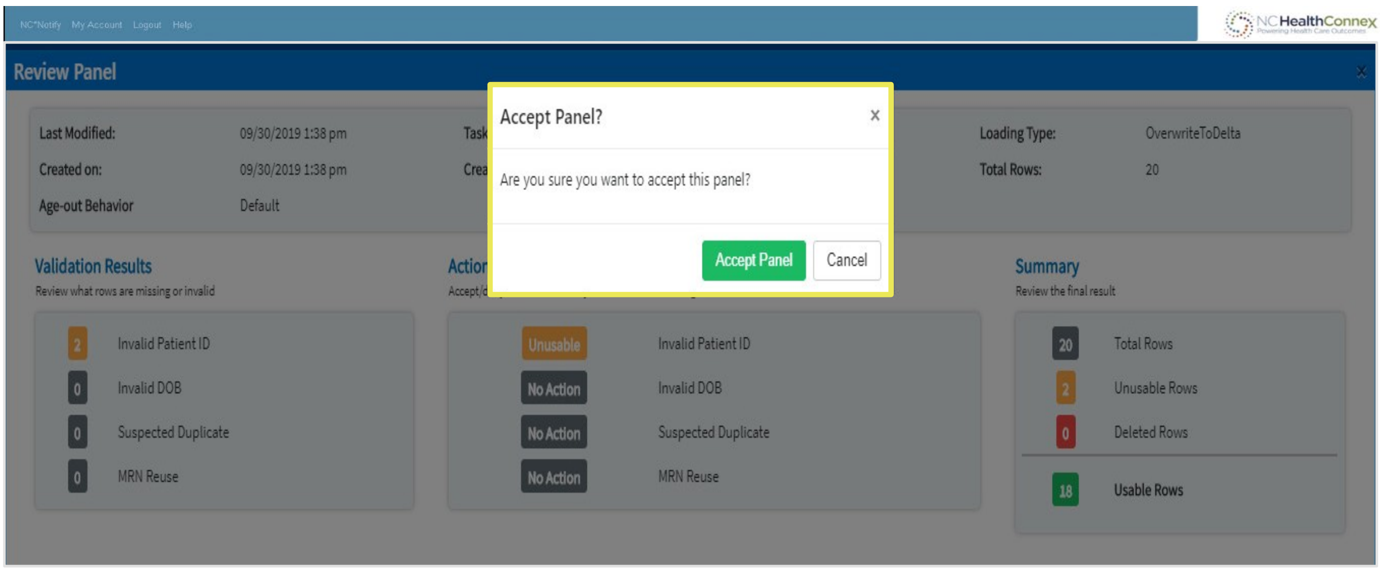


Step 8

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 user to make corrections before re-uploading.



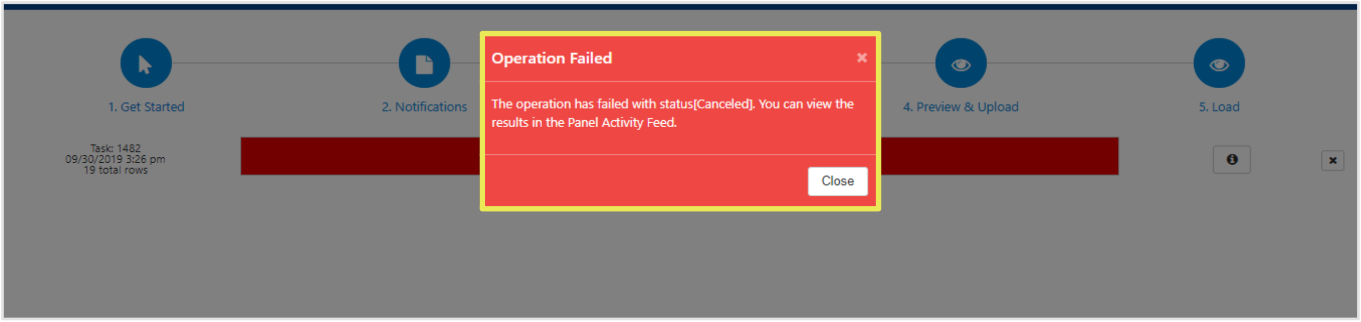
Step 9

If a panel fails after the review and loading stage:

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

Common reasons why panels fail:

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



Step 10

Confirmation: Our System will send a confirmation email or text to user after every successful upload if a user has entered their information in step 2.

Questions?

- Access the NC HealthConnex Clinical Portal here.
- The full NC HealthConnex Clinical Portal User Guide is available here: https://hiea.nc.gov/documents/nc-hiea-primary-provider-user-guide
- For additional assistance, please contact the Help Desk by emailing HIESupport@sas.com or call 919-531-2700.