

# NC HEALTHCONNEX CLINICAL PORTAL

## NC\*NOTIFY QUICK REFERENCE GUIDE



NORTH CAROLINA  
HEALTH INFORMATION EXCHANGE AUTHORITY

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## ACCESSING NC\*NOTIFY IN THE NC HEALTHCONNEX CLINICAL PORTAL

Full participants who have enrolled in the NC\*Notify V4 or v4+ 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.

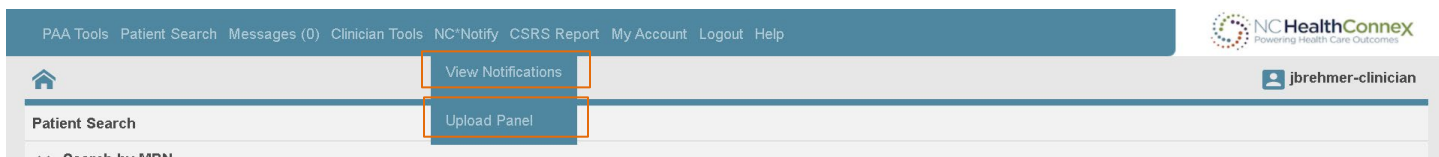
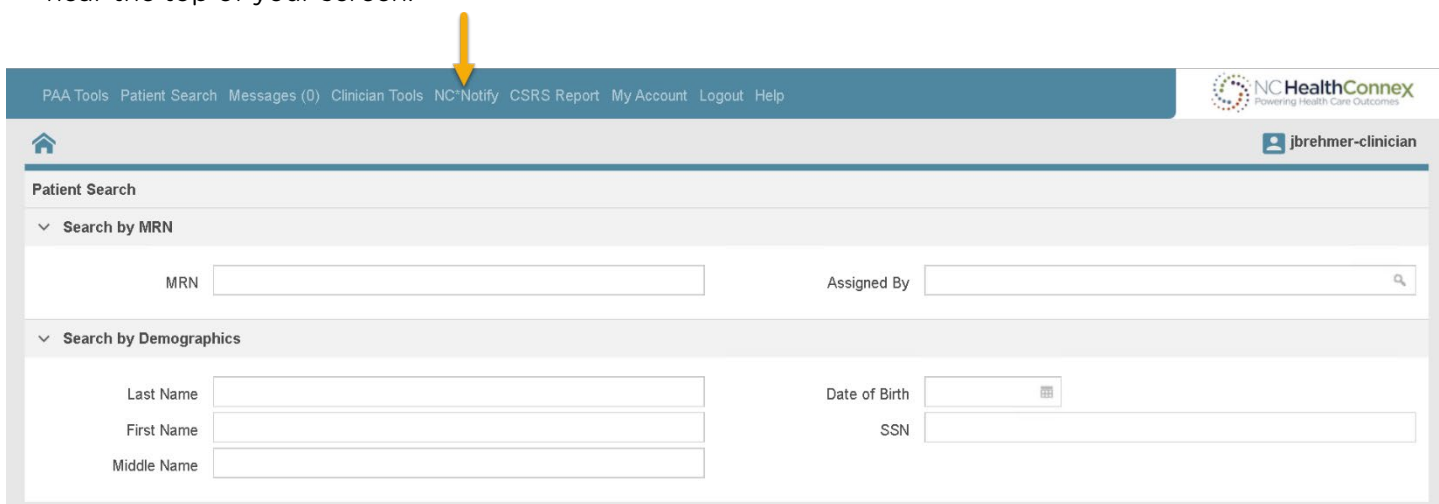
\* Patient data in this guide is from our demo environment. No real patient data is displayed.

\* **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.

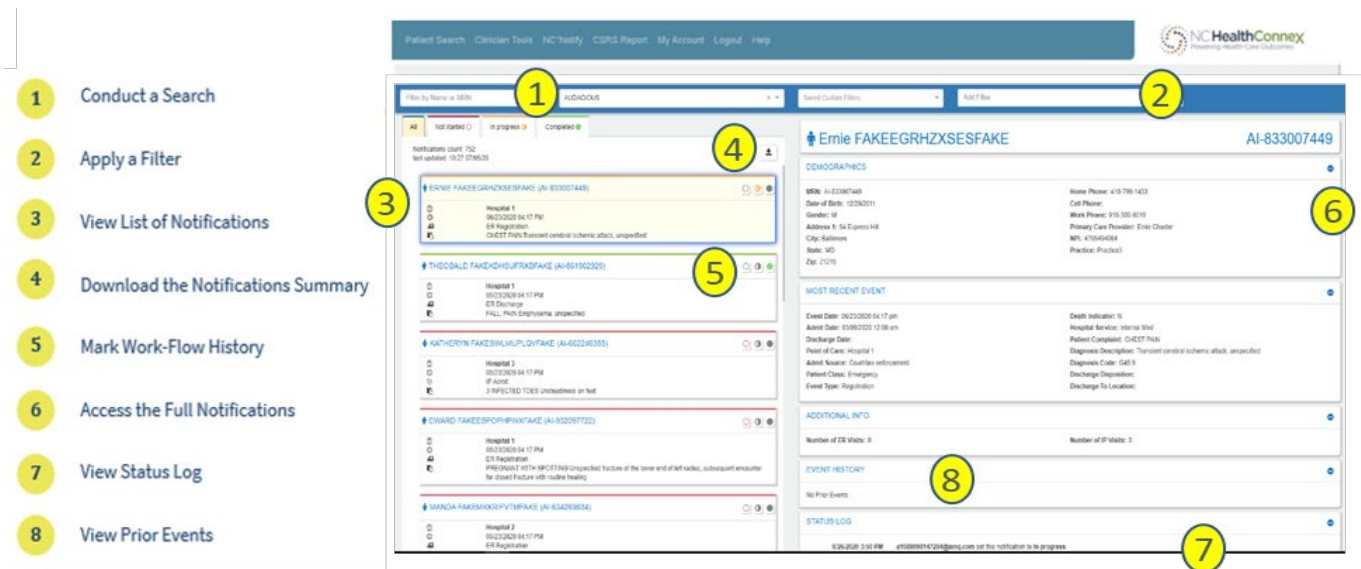
To conduct a search or find a list of your organization’s notifications, click the NC\*Notify menu item near the top of your screen.



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.



1 Conduct a Search

2 Apply a Filter

3 View List of Notifications

- Gender
- Name
- MRN/Unique identifier assigned by you (the participant)
- Date and time of the encounter/event
- Notification event type
- Patient Complaint followed by the diagnosis (if provided)

4 Download the Notifications Summary

5 View Workflow Status

## 6 Access the Full Notification

- 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

## 8 View Prior Events

### 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.



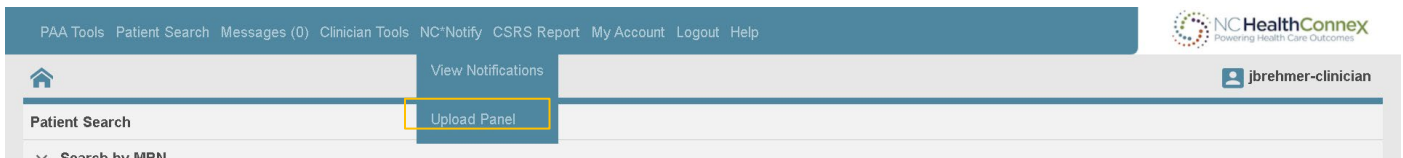
# UPLOADING A PATIENT PANEL IN NC HEALTHCONNEX CLINICAL PORTAL

## What Is the Self-Service Panel Loader?

The 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

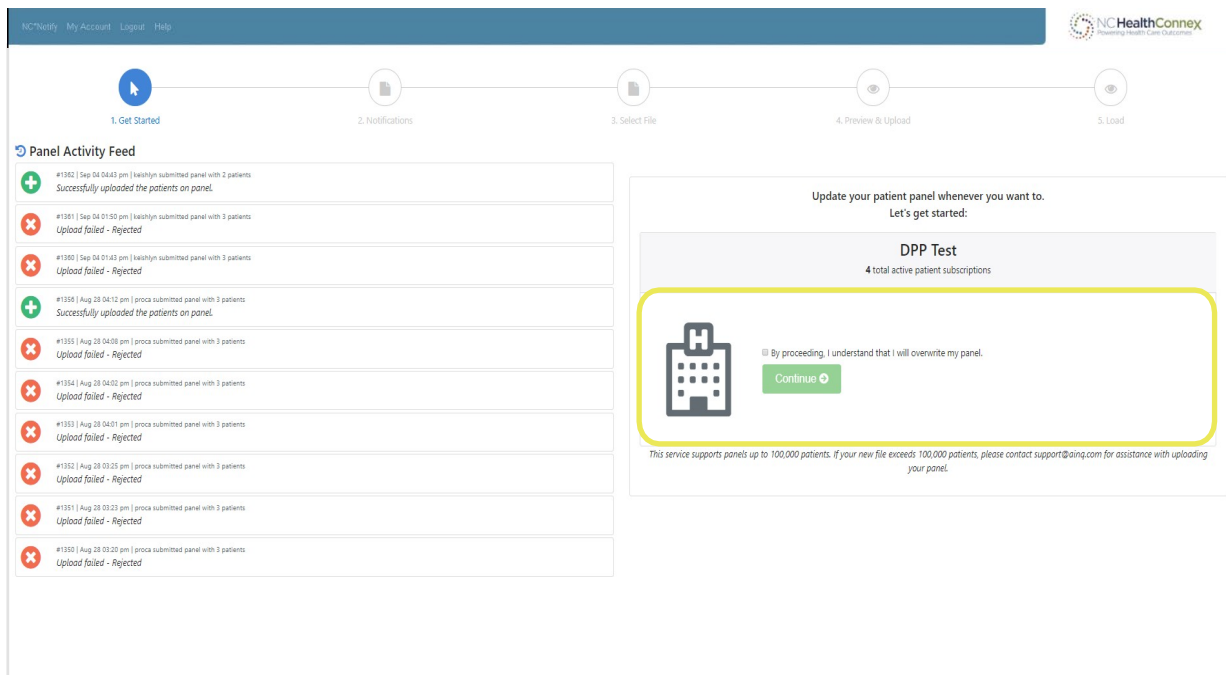
- Hover over NC\*Notify on the menu bar.
- Click Upload Panel.



On the default screen you will see 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.

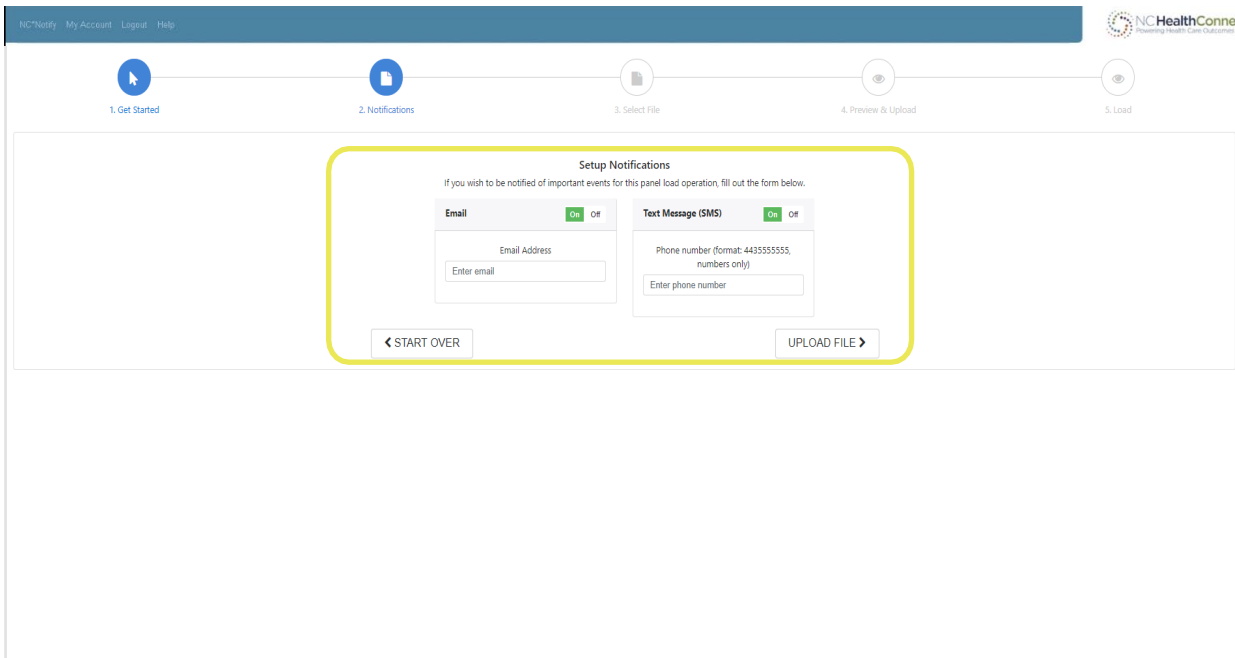




## Step 2

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.



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:

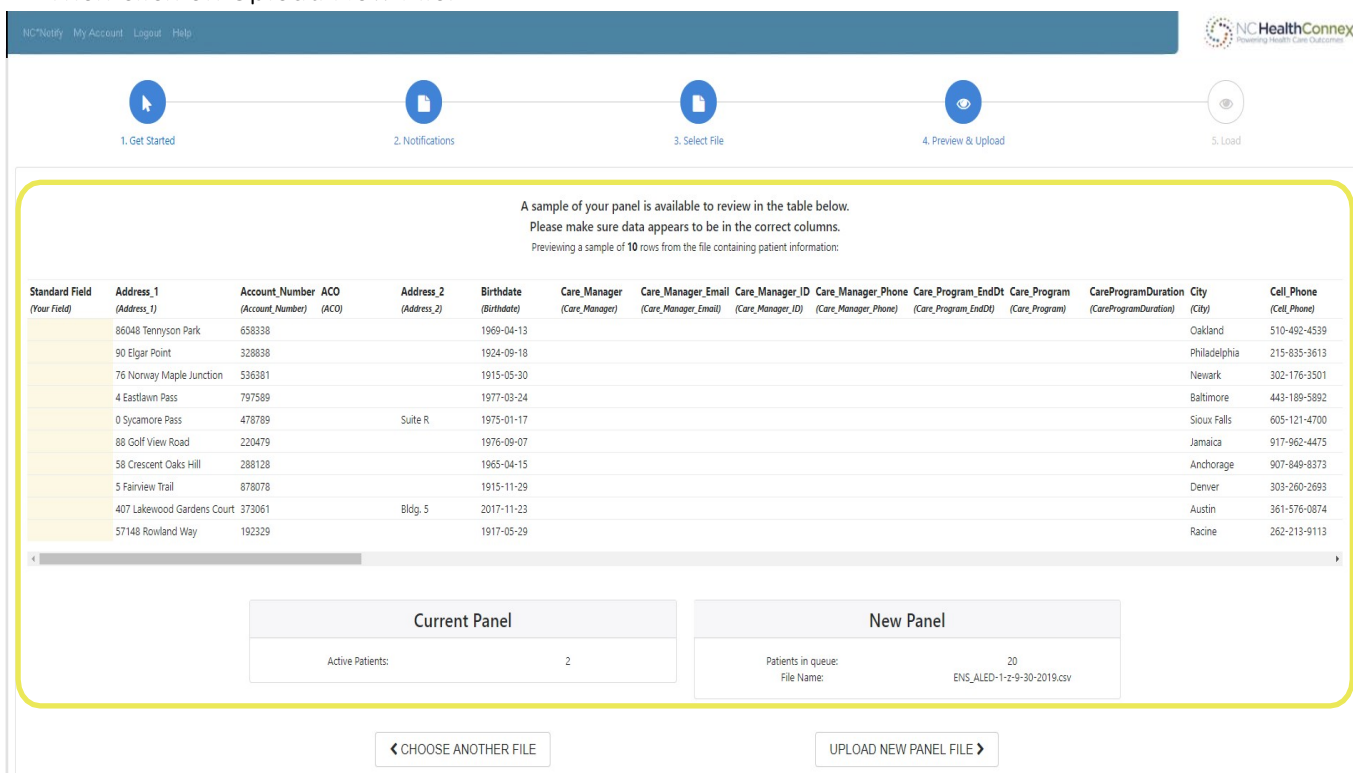
- .CSV prior to uploading

### 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.



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:

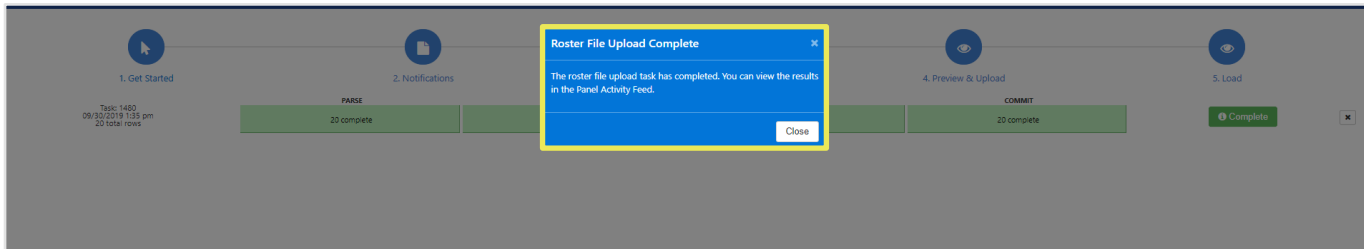
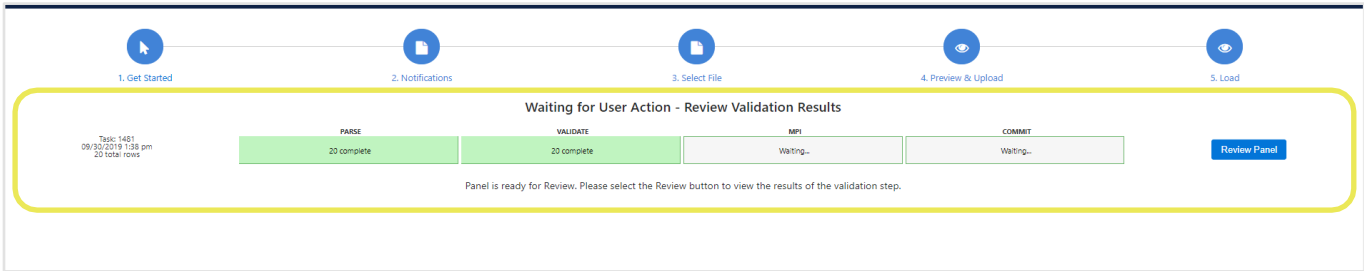
Standard Field (Your Field)	Address_1 (Address_1)	Account_Number (Account_Number)	ACO (ACO)	Address_2 (Address_2)	Birthdate (Birthdate)	Care_Manager (Care_Manager)	Care_Manager_Email (Care_Manager_Email)	Care_Manager_ID (Care_Manager_ID)	Care_Manager_Phone (Care_Manager_Phone)	Care_Program_EndDt (Care_Program_EndDt)	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	302-176-3501
	4 Eastlawn Pass	797589			1977-03-24								Baltimore	443-189-5892
	0 Sycamore Pass	478789		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-z-9-30-2019.csv

◀ CHOOSE ANOTHER FILE      UPLOAD NEW PANEL FILE ▶

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.



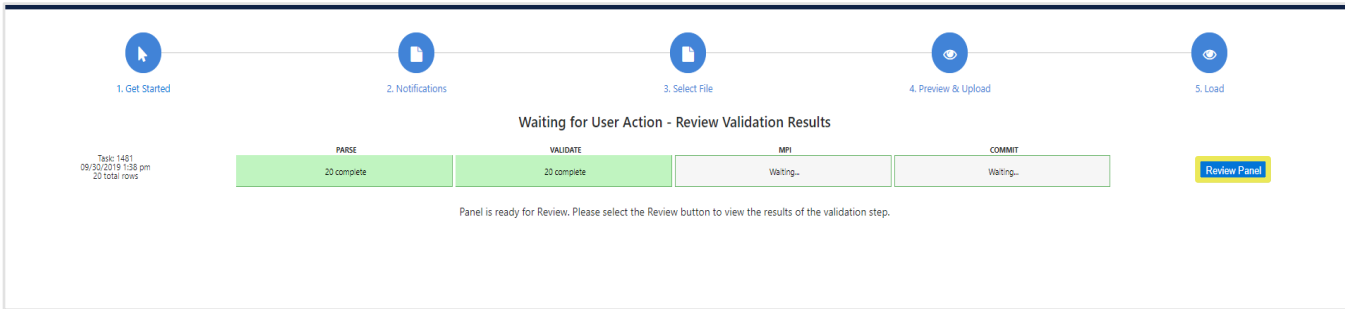
Panel Size	Average Upload Time
80-120 patients	8 minutes
900-1,100 patients	18 minutes
7,000-14,000 patients	25 minutes
95,000-105,000 patients	1 hour 27 minutes

## 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.



Task: 1481  
09/30/2019 1:38 pm  
20 total rows

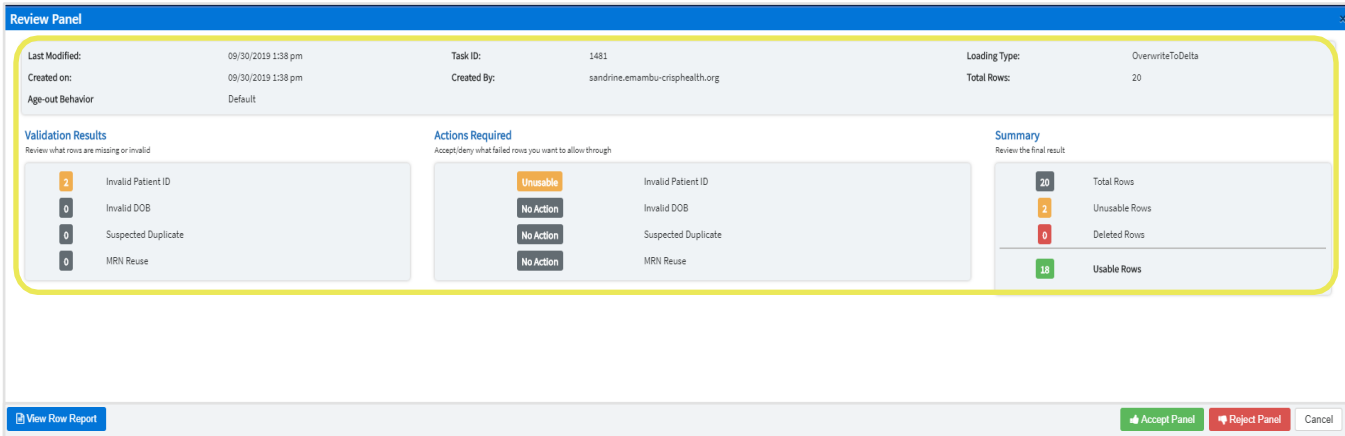
1. Get Started      2. Notifications      3. Select File      4. Preview & Upload      5. Load

**Waiting for User Action - Review Validation Results**

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.



**Review Panel**

Last Modified: 09/30/2019 1:38 pm      Task ID: 1481      Loading Type: OverwriteToDelta  
Created on: 09/30/2019 1:38 pm      Created By: sandrine.emambu-crisphealth.org      Total Rows: 20  
Age-out Behavior: Default

**Validation Results**  
Review what rows are missing or invalid

- 2 Invalid Patient ID
- 0 Invalid DOB
- 0 Suspected Duplicate
- 0 MRN Reuse

**Actions Required**  
Accept/deny what failed rows you want to allow through

- Unusable Invalid Patient ID
- No Action Invalid DOB
- No Action Suspected Duplicate
- No Action MRN Reuse

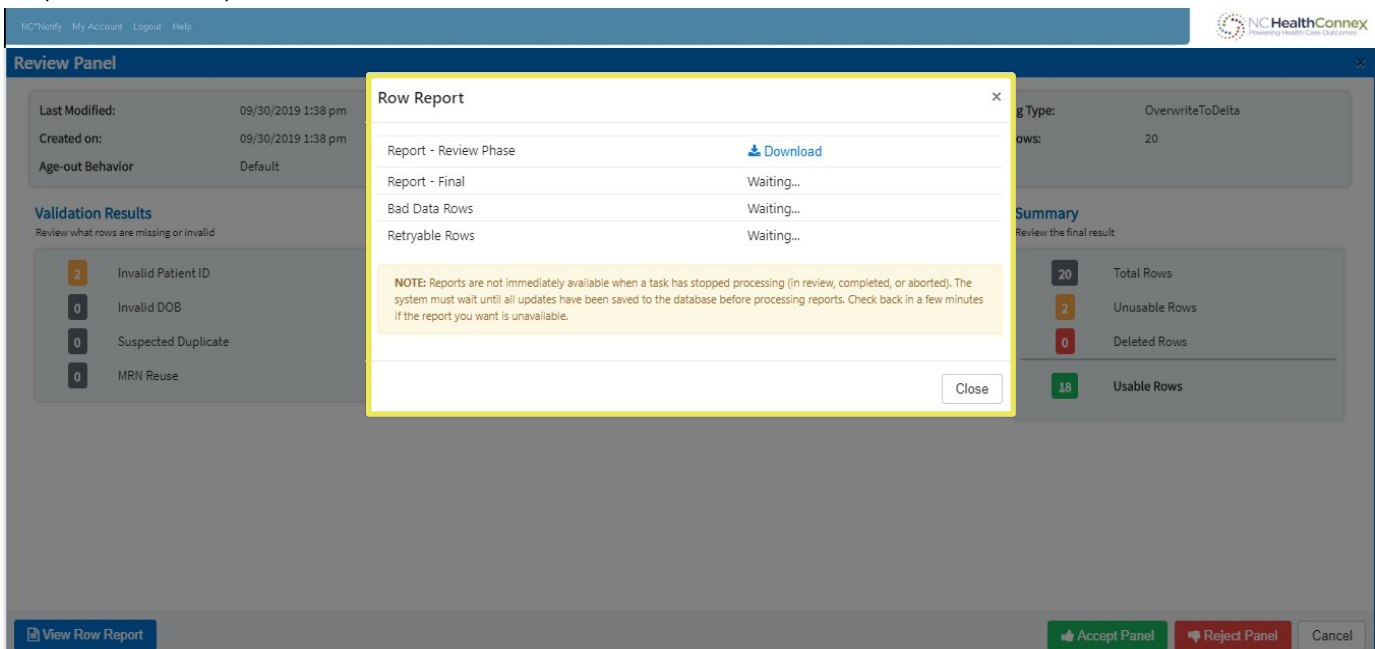
**Summary**  
Review the final result

- 20 Total Rows
- 2 Unusable Rows
- 0 Deleted Rows
- 18 Usable Rows

[View Row Report](#)      [Accept Panel](#)      [Reject Panel](#)      [Cancel](#)

## Step 7

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



NC\*Notify My Account Logout Help      NC HealthConnex

**Review Panel**

Last Modified: 09/30/2019 1:38 pm      Loading Type: OverwriteToDelta  
Created on: 09/30/2019 1:38 pm      Total Rows: 20  
Age-out Behavior: Default

**Validation Results**  
Review what rows are missing or invalid

- 2 Invalid Patient ID
- 0 Invalid DOB
- 0 Suspected Duplicate
- 0 MRN Reuse

**Row Report**

- Report - Review Phase [Download](#)
- Report - Final Waiting...
- Bad Data Rows Waiting...
- Retryable Rows Waiting...

**Summary**  
Review the final result

- 20 Total Rows
- 2 Unusable Rows
- 0 Deleted Rows
- 18 Usable Rows

**NOTE:** Reports are not immediately available when a task has stopped processing (in review, completed, or aborted). The system must wait until all updates have been saved to the database before processing reports. Check back in a few minutes if the report you want is unavailable.

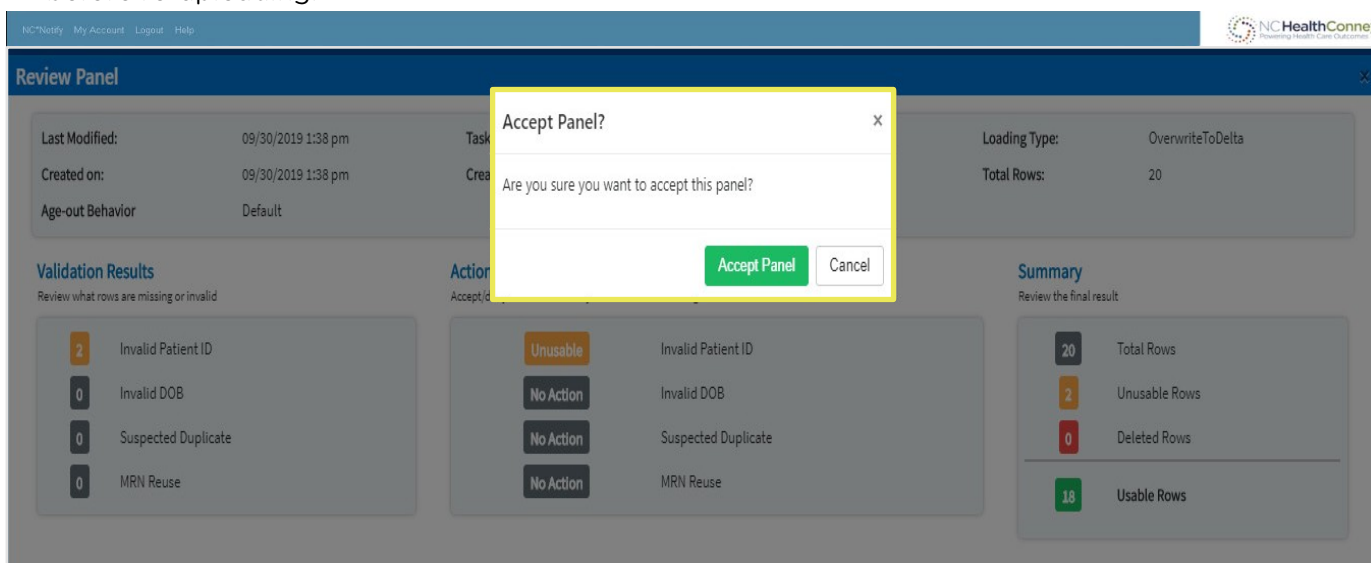
[View Row Report](#)      [Accept Panel](#)      [Reject Panel](#)      [Cancel](#)

## 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.



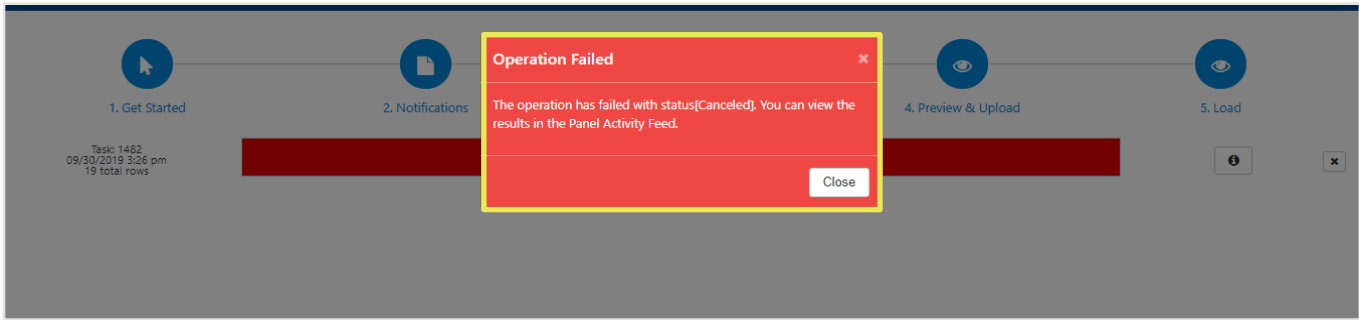
## Step 9

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:

- 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

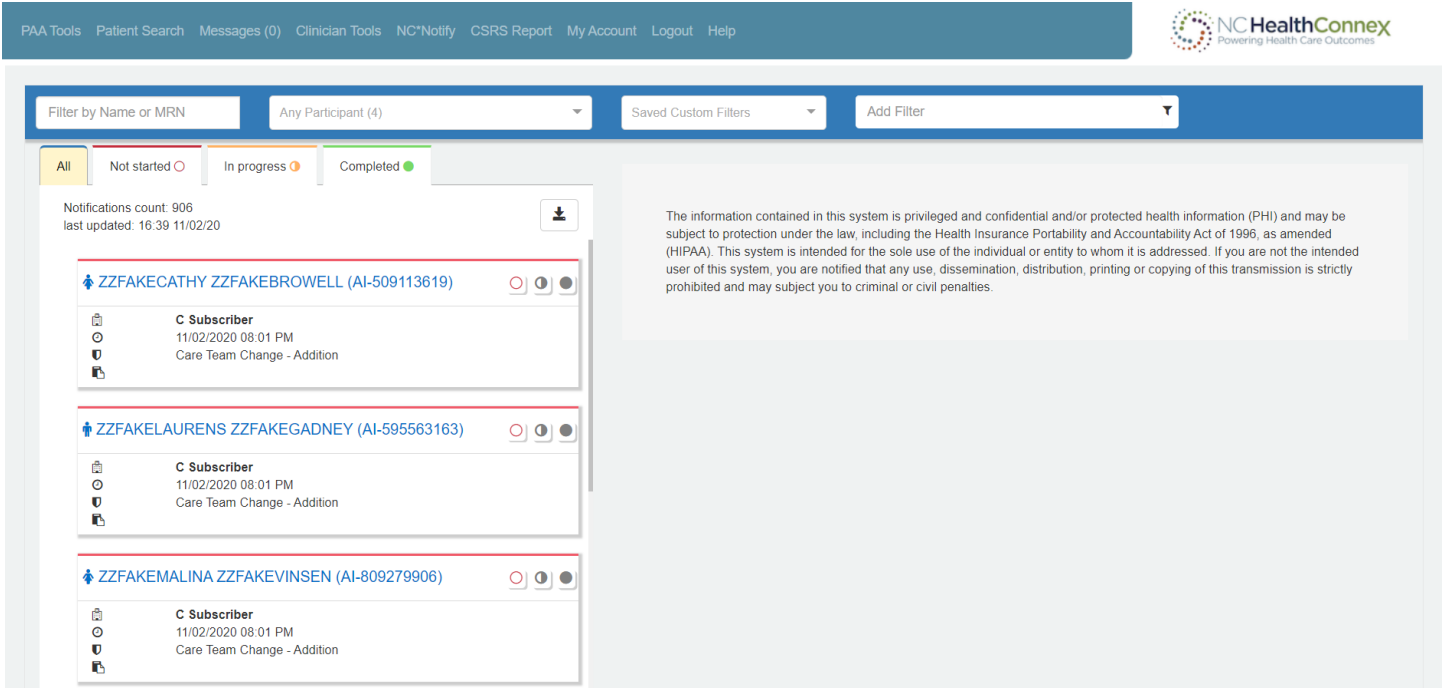


## Step 10

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

# CREATING FILTERS IN THE NC\*NOTIFY DASHBOARD

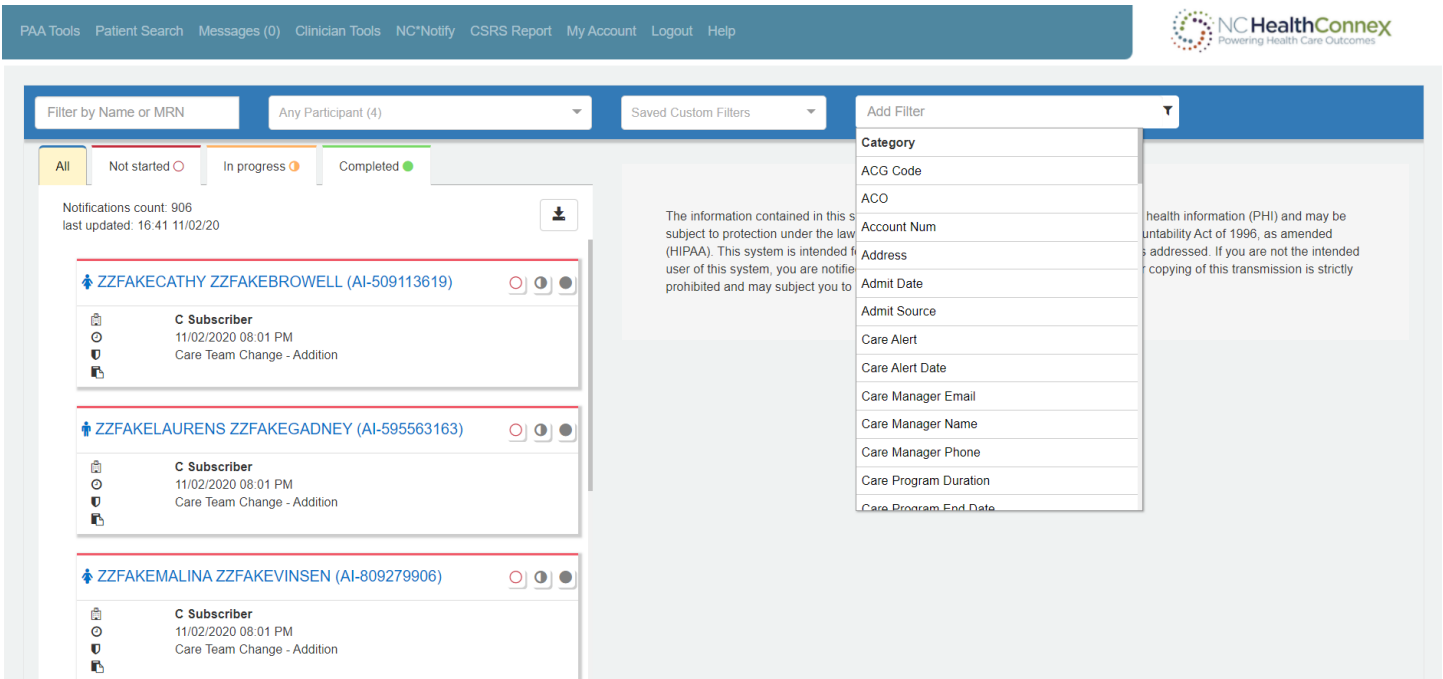
## Basic View



The screenshot shows the NC\*Notify dashboard in its basic view. At the top, there is a navigation bar with links for PAA Tools, Patient Search, Messages (0), Clinician Tools, NC\*Notify, CSRS Report, My Account, Logout, and Help. The main header area contains a search bar for 'Filter by Name or MRN', a dropdown menu for 'Any Participant (4)', a 'Saved Custom Filters' dropdown, and an 'Add Filter' button. Below the header, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The 'All' tab is selected, showing a list of notifications. The first notification is for ZZFAKECATHY ZZFAKEBROWELL (AI-509113619), with a status of 'C Subscriber' and a timestamp of 11/02/2020 08:01 PM. The notification text is 'Care Team Change - Addition'. A second notification is for ZZFAKELAURENS ZZFAKEGADNEY (AI-595563163), also with a status of 'C Subscriber' and the same timestamp and text. A third notification is for ZZFAKEMALINA ZZFAKEVINSEN (AI-809279906), with the same status, timestamp, and text. On the right side of the dashboard, there is a privacy notice: 'The information contained in this system is privileged and confidential and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This system is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended user of this system, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties.'

## Step 1

Select the drop down titled "Add Filter":



This screenshot shows the same dashboard as the previous one, but with the 'Add Filter' dropdown menu open. The dropdown menu lists various filter categories: Category, ACG Code, ACO, Account Num, Address, Admit Date, Admit Source, Care Alert, Care Alert Date, Care Manager Email, Care Manager Name, Care Manager Phone, Care Program Duration, and Care Program End Date. The rest of the dashboard, including the navigation bar, header, tabs, and notification list, remains the same as in the previous screenshot.

## Filter Options

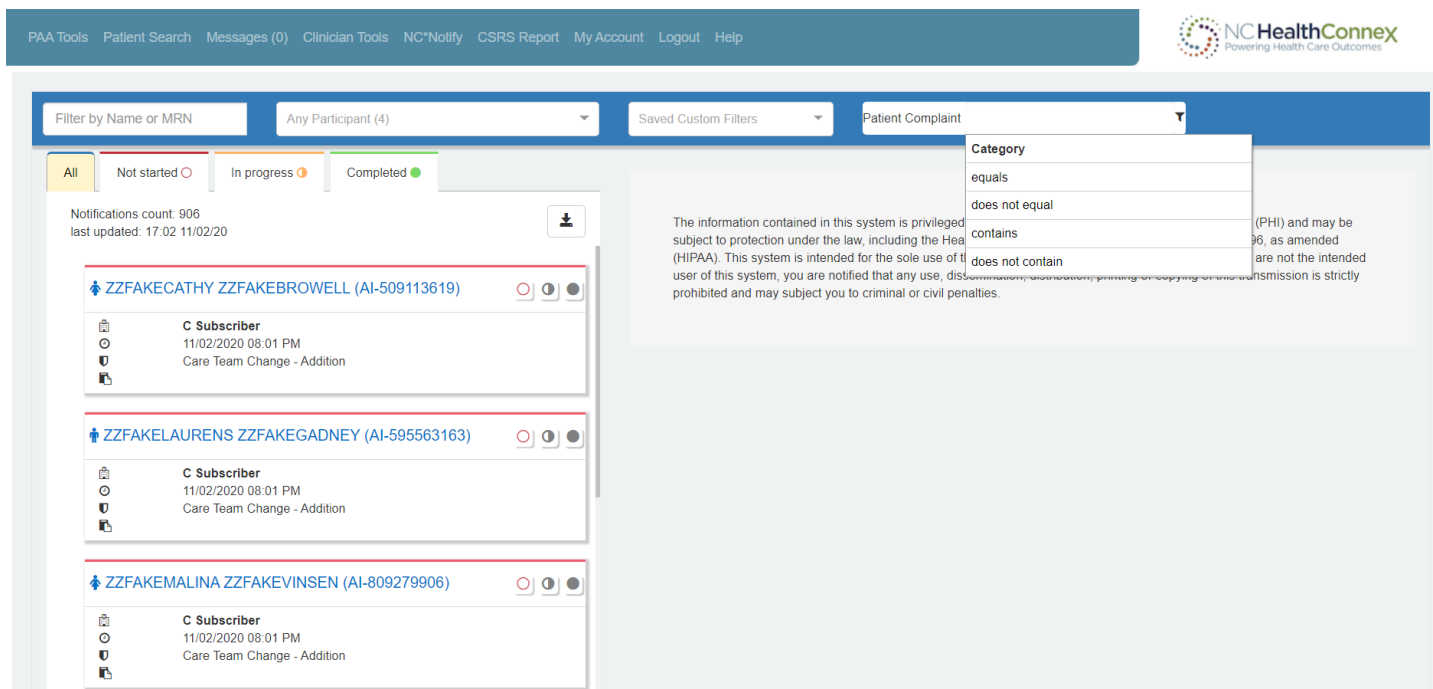
Options			
Account Num	Coordination Risk Ind.	Hospital Service	Point of Care
ACG Code	County	IHP	Practice Name
ACO	Criteria 1	IHP Clinic Name	Primary Care Provider
Address	Criteria 2	IHP Clinic NPI	Prob Admit in 6 Months
Admit Date	Criteria 3	IHP Identifier	Prob High Rx Cost
Admit Source	Current Homeless Flag	IHP Provider Name	Prob High Total Cost
Alert Note 1	Date of Birth	IHP Provider NPI	Prob IP Hospitalization
Alert Note 2	Date of Death	Insurance	Provider Seen Most
Alert Type	Death Indicator	Insurance ADT	Provider Seen Most NPI
Care Alert	Diagnosis Code	Last Name	Race
Care Alert Date	Diagnosis Description	Location	Rec. Phone Number
Care Manager Email	Discharge Date	MCO	Recent Homeless Flag
Care Manager Name	Discharge Disposition	Message 1	Resource Util. Band
Care Manager Phone	Discharge to Location	Message 2	Risk Methodology 1
Care Program Duration	Ethnicity	Message 3	Risk Methodology 2
Care Program End Date	Event Date	Middle Name	Risk Methodology Des1
Care Program Id	Event Facility	MRN	Risk Methodology Des2
Care Program Name	Event Type	NPI	Risk Score 1
Care Program Start Date	First Name	Number of ER Visits	Risk Score 2
Care Team Changed	Frailty Flag	Number of IP Visits	Source MRN
Cell Phone	Full Name	Patient Class	State
Chronic Condition Count	Gender	Patient Complaint	Unique Providers Seen
City	Group	Patient Complaint Code	Waivers
Clinic Name	High Risk Unexpected Rx	Patient Location Description	Work Phone
Clinic NPI	Home Phone	Patient Location Facility	Zip Code



## Step 2

This example is searching for any patient that presented with COVID or COVID symptoms.

- Select a filter (Patient Complaint).
- Once selected, choose a category from the pop-up box (Contains).



The screenshot shows the NC HealthConnex interface. At the top, there is a navigation bar with links: PAA Tools, Patient Search, Messages (0), Clinician Tools, NC\*Notify, CSRS Report, My Account, Logout, and Help. The main header area includes a search bar 'Filter by Name or MRN', a dropdown menu 'Any Participant (4)', 'Saved Custom Filters', and a dropdown menu 'Patient Complaint'. Below the header, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. A notification count of 906 is shown, last updated on 11/02/20 at 17:02. The main content area displays three patient entries, each with a name and AI number, a 'C Subscriber' status, and a timestamp of 11/02/2020 08:01 PM. A dropdown menu is open over the 'Patient Complaint' filter, showing options: 'Category', 'equals', 'does not equal', 'contains', and 'does not contain'. A privacy notice is visible in the background: 'The information contained in this system is privileged subject to protection under the law, including the Health Information Privacy Act (HIPAA). This system is intended for the sole use of the user of this system, you are notified that any use, dissemination, or disclosure of information is strictly prohibited and may subject you to criminal or civil penalties.'

## Step 3

- Type the name of virus (COVID) or COVID symptom.
- Press Enter.

The screenshot shows the top navigation bar with 'PAA Tools', 'Patient Search', 'Messages (0)', 'Clinician Tools', 'NC\*Notify', 'CSRS Report', 'My Account', 'Logout', and 'Help'. The main header contains a search bar 'Filter by Name or MRN', a dropdown 'Any Participant (4)', 'Saved Custom Filters', and a filter input 'Patient Complaint contains fever'. Below the header are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The notification list shows three entries for 'C Subscriber' with the subject 'Care Team Change - Addition' and a timestamp of '11/02/2020 08:01 PM'. A privacy notice is visible on the right side of the screen.

### Step 4

The only Notifications displayed will be patients who presented with "COVID" and/or "Fever" as their chief complaint.

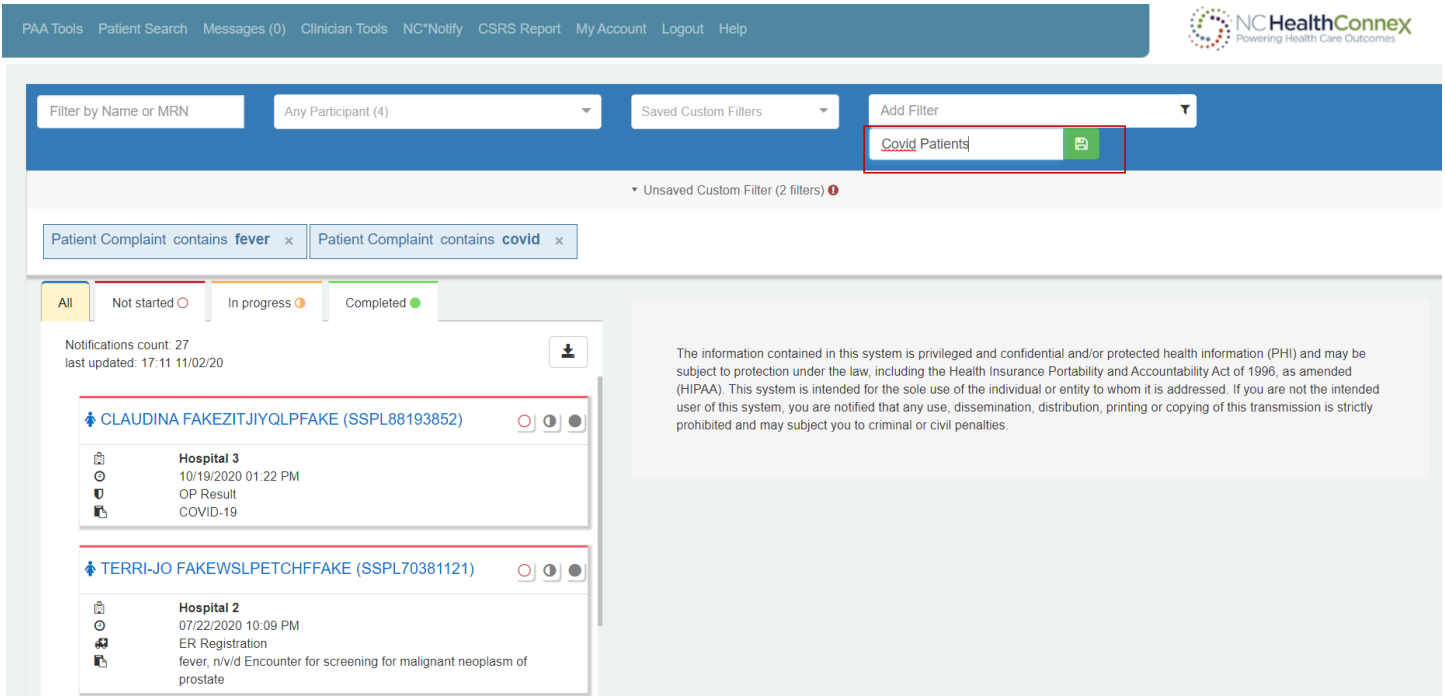
\* Filter can contain multiple filters as shown below (treated as "Or").

\*The notification with fever as the complaint is not related to COVID.

The screenshot shows the top navigation bar with 'PAA Tools', 'Patient Search', 'Messages (0)', 'Clinician Tools', 'NC\*Notify', 'CSRS Report', 'My Account', 'Logout', and 'Help'. The main header contains a search bar 'Filter by Name or MRN', a dropdown 'Any Participant (4)', 'Saved Custom Filters', and an 'Add Filter' button. Below the header are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The notification list shows two entries: one for 'Hospital 3' with the subject 'OP Result COVID-19' and a timestamp of '10/19/2020 01:22 PM', and another for 'Hospital 2' with the subject 'ER Registration fever, n/v/d Encounter for screening for malignant neoplasm of prostate' and a timestamp of '07/22/2020 10:09 PM'. A privacy notice is visible on the right side of the screen.

### Step 5

To save the filter, enter a filter name in the box labeled "Custom Filter Name":



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

Filter by Name or MRN Any Participant (4) Saved Custom Filters Add Filter

Covid Patients

▼ Unsaved Custom Filter (2 filters)

Patient Complaint contains fever x Patient Complaint contains covid x

All Not started In progress Completed

Notifications count: 27  
last updated: 17:11 11/02/20

CLAUDINA FAKEZTJIYQLPFAKE (SSPL88193852)

Hospital 3  
10/19/2020 01:22 PM  
OP Result  
COVID-19

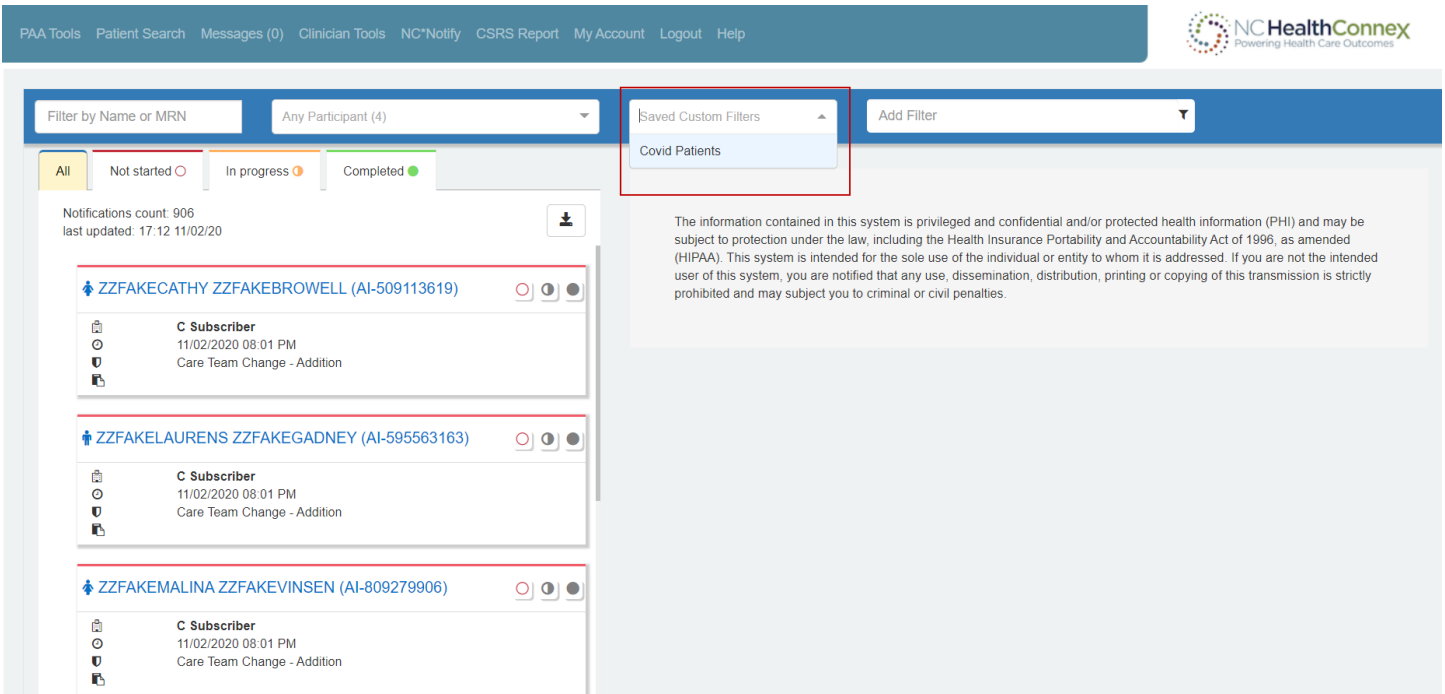
TERRI-JO FAKESLWLPETCHFFAKE (SSPL70381121)

Hospital 2  
07/22/2020 10:09 PM  
ER Registration  
fever, n/w/d Encounter for screening for malignant neoplasm of prostate

The information contained in this system is privileged and confidential and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This system is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended user of this system, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties.

## Step 6

Select the green "Save" button to the right of the text and the saved filter name is available from the 'Saved Custom Filters' button.



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

Filter by Name or MRN Any Participant (4) Saved Custom Filters Add Filter

Covid Patients

All Not started In progress Completed

Notifications count: 906  
last updated: 17:12 11/02/20

ZZFAKECATHY ZZFAKEBROWELL (AI-509113619)

C Subscriber  
11/02/2020 08:01 PM  
Care Team Change - Addition

ZZFAKELAURENS ZZFAKEGADNEY (AI-595563163)

C Subscriber  
11/02/2020 08:01 PM  
Care Team Change - Addition

ZZFAKEMALINA ZZFAKEVINSEN (AI-809279906)

C Subscriber  
11/02/2020 08:01 PM  
Care Team Change - Addition

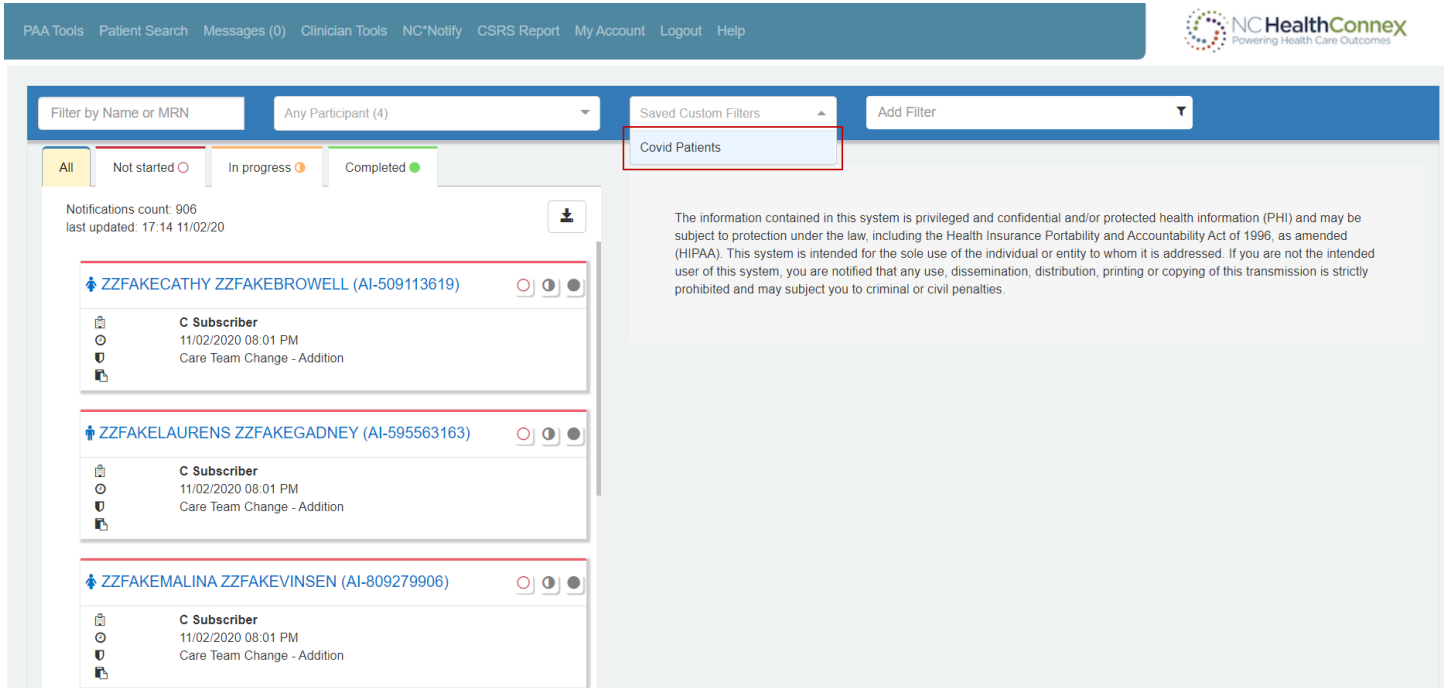
The information contained in this system is privileged and confidential and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This system is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended user of this system, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties.

## VIEWING NOTIFICATIONS FROM SAVED FILTERS

### Step 1

Select the filter from the pull-down menu to apply the filter:

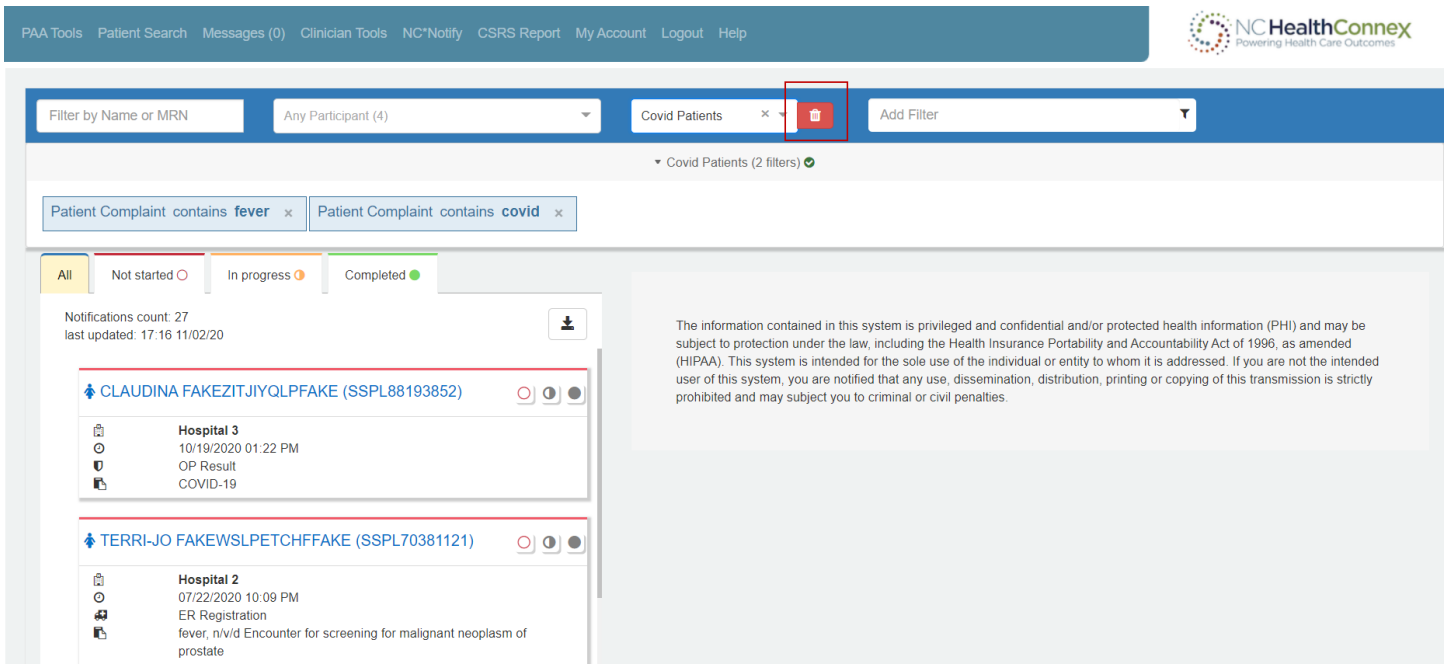
\* *Custom filters may be saved and are available in the pulldown "Saved Custom Filters" menu.*



The screenshot shows the top navigation bar with 'PAA Tools', 'Patient Search', 'Messages (0)', 'Clinician Tools', 'NC\*Notify', 'CSRS Report', 'My Account', 'Logout', and 'Help'. Below this is a search bar with 'Filter by Name or MRN' and a dropdown menu set to 'Any Participant (4)'. To the right, the 'Saved Custom Filters' dropdown menu is open, showing 'Covid Patients' selected and highlighted with a red box. Below the filter menu, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The main content area displays a list of notifications for three patients, each with a 'Trash Can' icon in the top right corner. A privacy notice is visible on the right side of the screen.

### Step 2

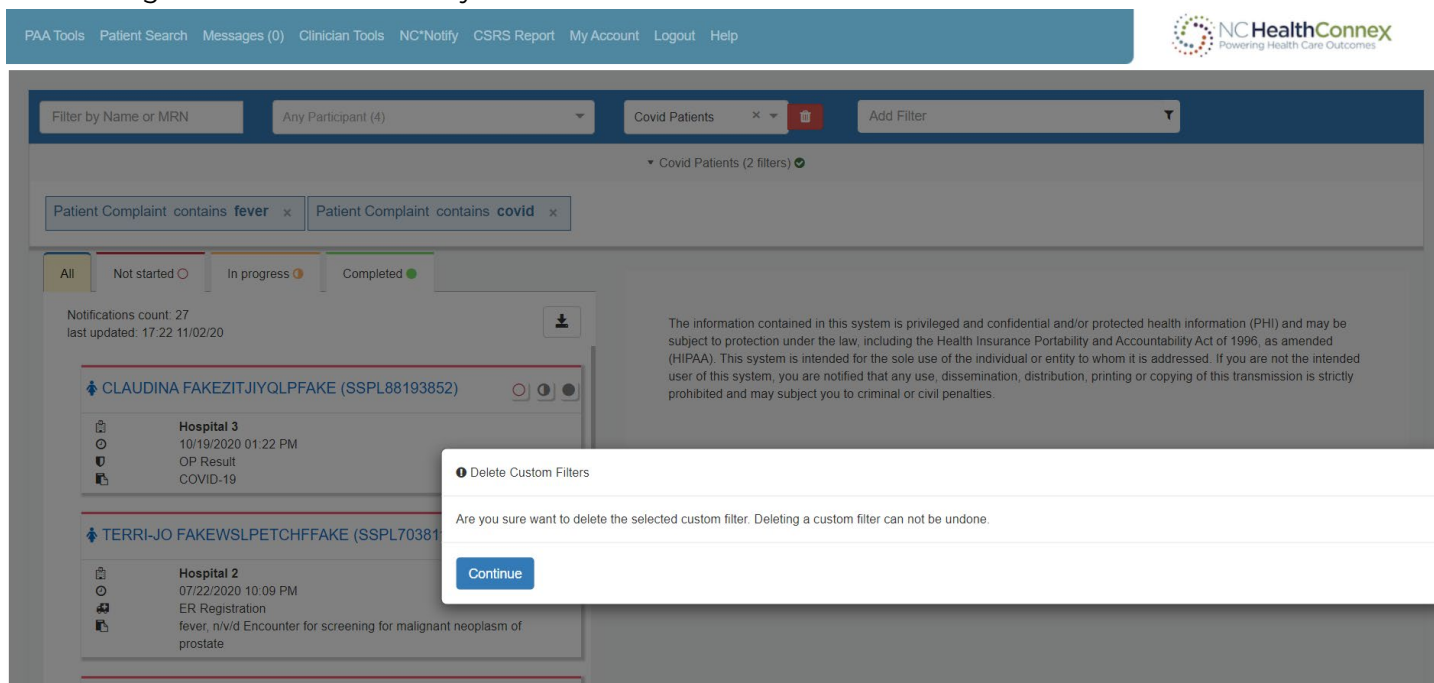
After selecting a filter, the "Trash Can" icon may be used to delete/remove the filter:



The screenshot shows the same interface as Step 1, but now the 'Covid Patients' filter is applied. The 'Saved Custom Filters' dropdown menu is closed, and the 'Trash Can' icon next to the 'Covid Patients' filter name is highlighted with a red box. Below the filter menu, there are two active filters: 'Patient Complaint contains fever' and 'Patient Complaint contains covid'. The main content area displays a list of notifications for two patients, each with a 'Trash Can' icon in the top right corner. A privacy notice is visible on the right side of the screen.

### Step 3

To alter a filter, the filter can be removed and re-saved. To re-save, begin at step 1 under the Creating Filters in the NC\*Notify Dashboard section.



The screenshot shows the NC HealthConnex dashboard interface. At the top, there is a navigation bar with links: PAA Tools, Patient Search, Messages (0), Clinician Tools, NC\*Notify, CSRS Report, My Account, Logout, and Help. The main content area displays a search filter for 'Covid Patients' with two sub-filters: 'Patient Complaint contains fever' and 'Patient Complaint contains covid'. A modal dialog box titled 'Delete Custom Filters' is open, asking 'Are you sure want to delete the selected custom filter. Deleting a custom filter can not be undone.' with a 'Continue' button. The background shows a list of patient notifications, including details for CLAUDINA FAKEZITJIYQLPFAKE and TERRI-JO FAKEWSPETCHFFAKE.

### 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](mailto:HIESupport@sas.com) or call 919-531-2700.