

# NC HEALTHCONNEX CLINICAL PORTAL

## NC\*NOTIFY QUICK REFERENCE GUIDE



NORTH CAROLINA  
HEALTH INFORMATION  
EXCHANGE AUTHORITY

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## I. 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 Clinical 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.

*Note: 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 NC HealthConnex Clinical Portal at <https://portal.nchealthconnex.net> using your assigned credentials.

First, agree to the legal disclaimer to continue.

#### DISCLAIMER

**Please read the following information. It will be updated on an ongoing basis. By using this application, you consent and agree to abide by all applicable federal and state law and the NC Health Information Exchange Authority (NC HIEA) Participation Agreement.**

##### Confidentiality Notice for Alcohol and Drug Abuse Information

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

##### Confidentiality Notice for Psychotherapy Information

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

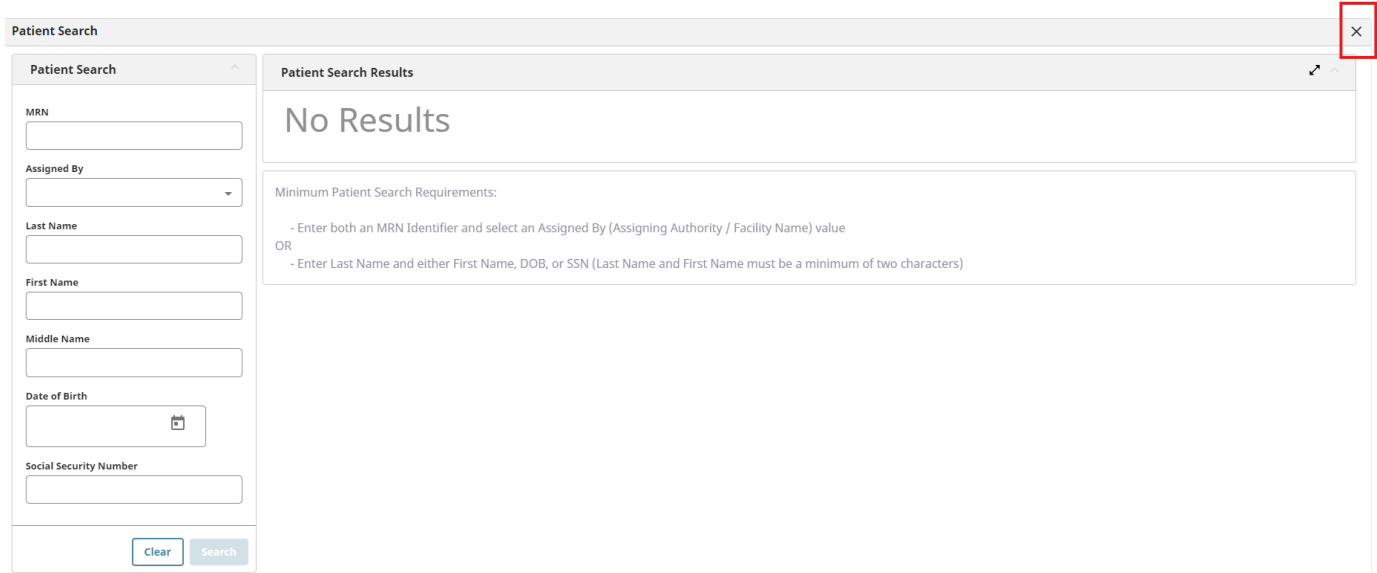
##### Physician Responsibility

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

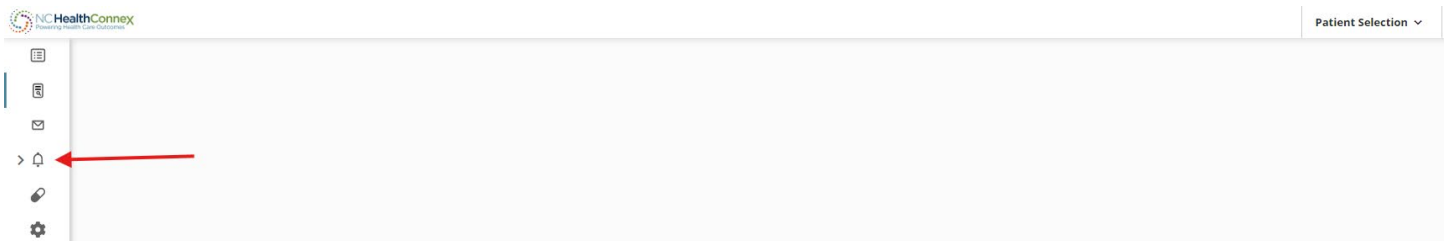
Disagree

Agree

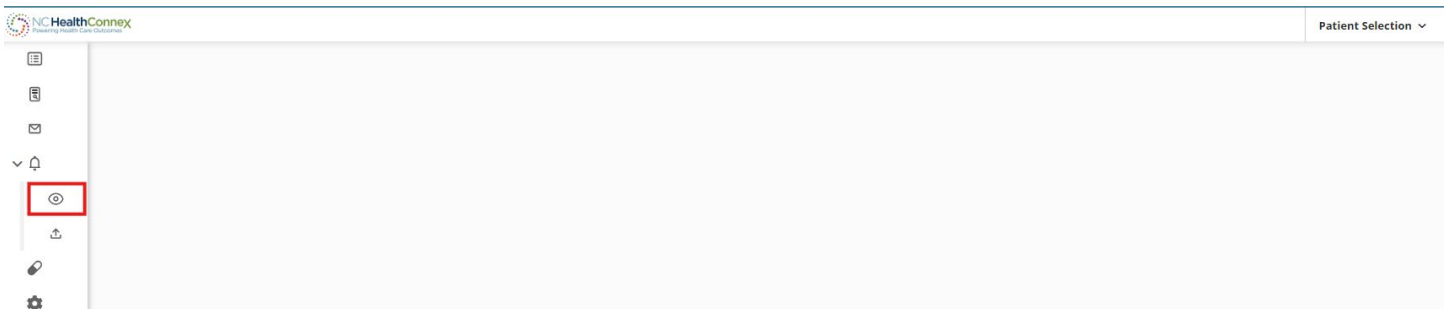
Next, close the Patient Search window that opens automatically.



To conduct a search or find a list of your organization's notifications, click the NC\*Notify menu item (bell icon) on the left side of your screen.



The user is presented with the following options, View Notifications (eyeball icon) or Upload Panel (upload icon). Click on the eyeball icon.



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
- 4 Download the Notifications Summary
- 5 Mark Work-Flow History
- 6 Access the Full Notifications
- 7 View Status Log
- 8 View Prior Events

The screenshot shows the NC\*Notify interface. At the top, there is a search bar (1) and a filter dropdown (2). Below the search bar, there is a list of notifications (3) with a download button (4). To the right of the list, there is a patient panel (6) showing patient information and a most recent event (5). At the bottom, there is a status log (7) and a view prior events button (8).

## Learn More About Each Feature

### 1 Conduct a Search

A user can use the search box to filter results by patient name or Medical Record Number (MRN) or 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 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)
- Location, date and time of the encounter/event
- 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 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 Workflow 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 (admission, discharge, transfer) 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)
- 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 user name at the top right of the screen, and then click the logout menu item from the dropdown menu. Now close the browser tab.

*Note: NC\*Notify sits inside of the NC HealthConnex Clinical Portal which automatically times users out after 15 minutes of inactivity. This can cause NC\*Notify users to time out unexpectedly if they are not actively engaged with a Clinical Portal window.*

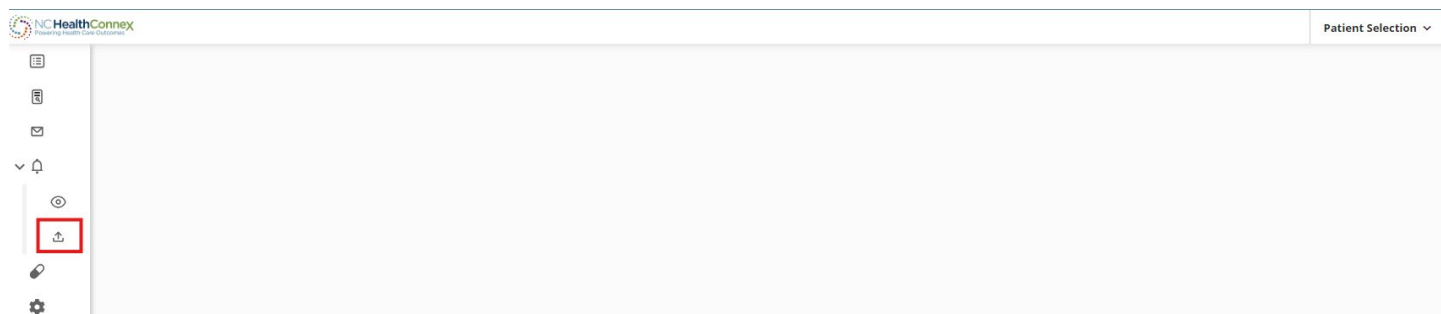
## II. UPLOADING A PATIENT PANEL IN THE CLINICAL PORTAL

### 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

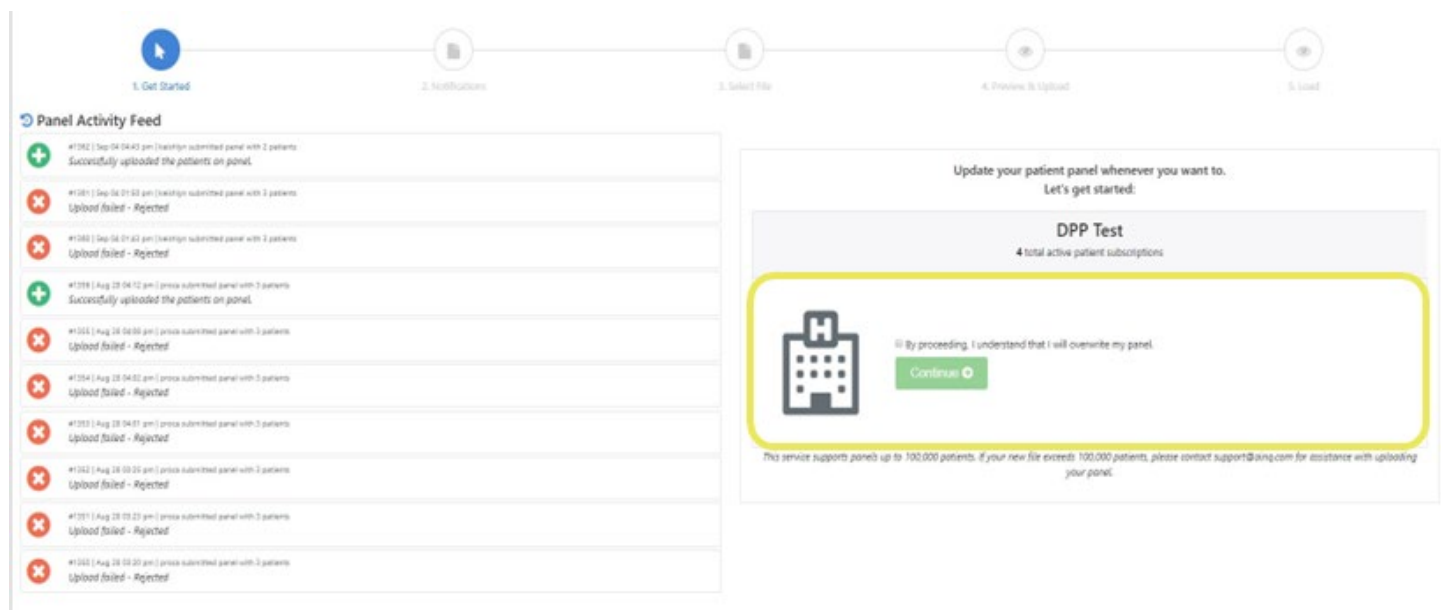
- Click the NC\*Notify menu item (bell icon) on the left side of the screen.
- Click **“Upload Panel”** (upload icon).



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.

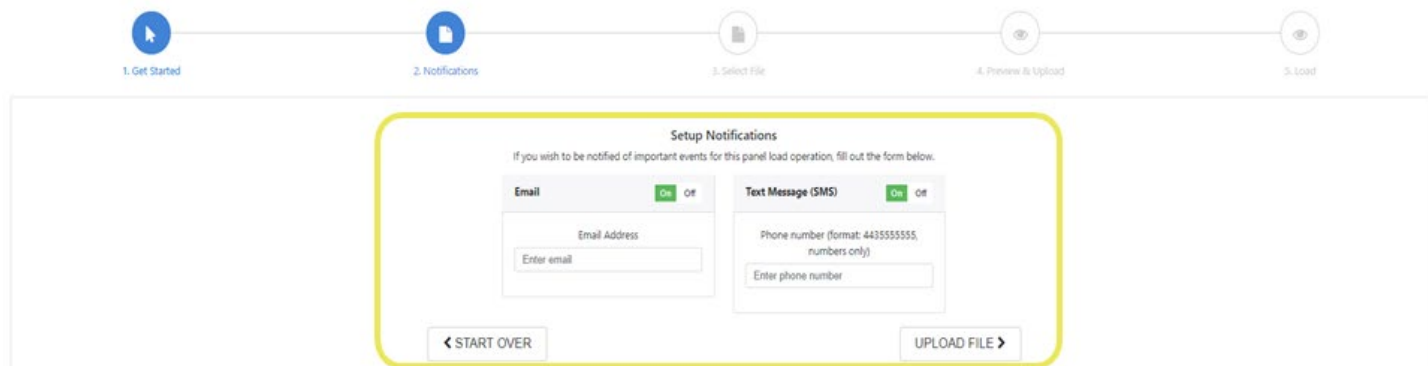
To proceed with uploading your panel, click the check box (By proceeding, I understand that I will overwrite my panel) and click **“Continue.”**





## 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.



## 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:

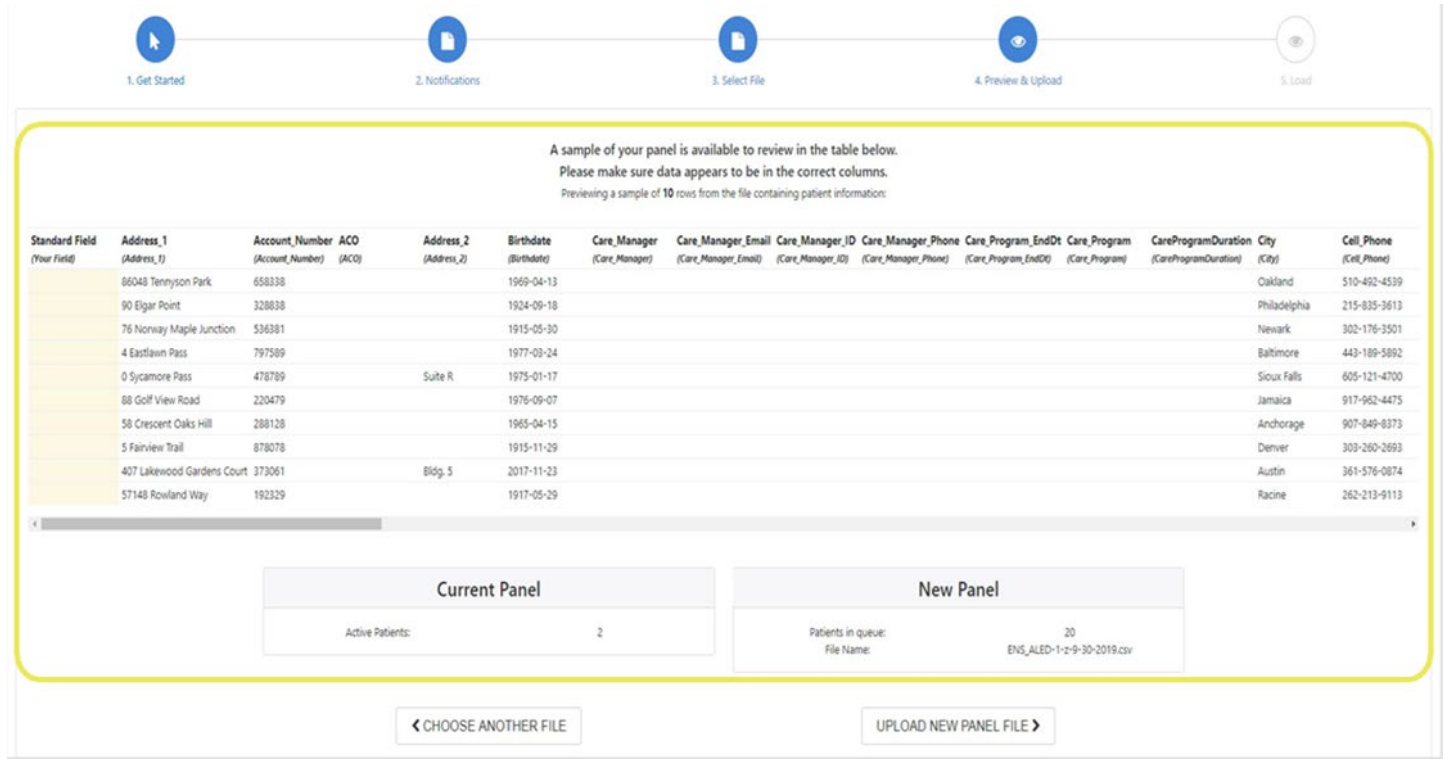
- .CSV prior to uploading

## 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.”



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	302-176-3501
	4 Eastlawn Pass	797589		1977-09-24								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

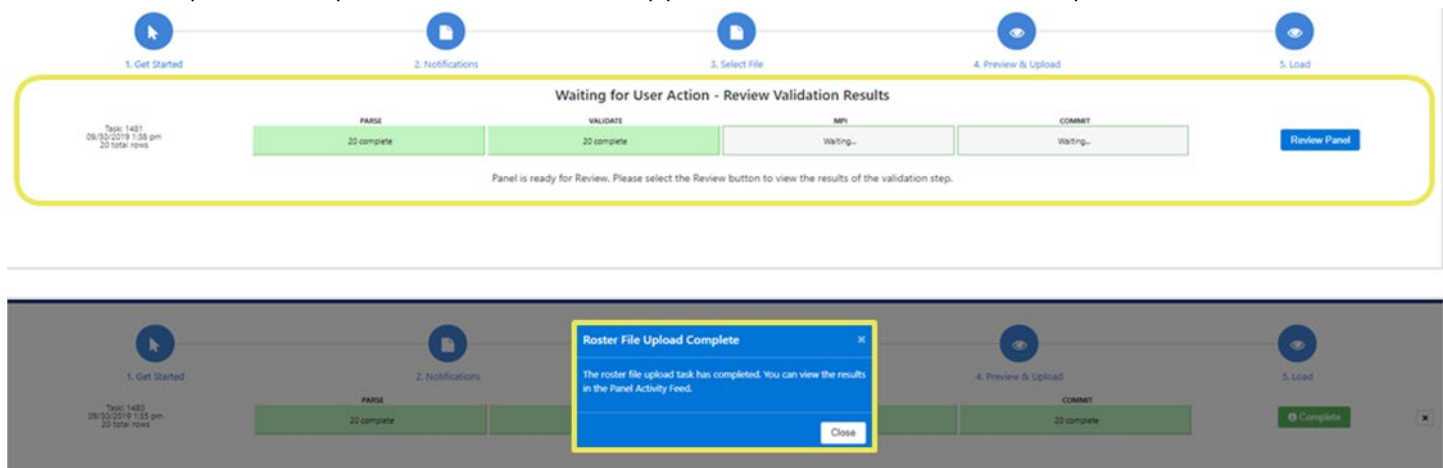
Current Panel  
Active Patients: 2

New Panel  
Patients in queue: 20  
File Name: ENS\_ALED-1-z-9-30-2019.csv

CHOOSE ANOTHER FILE      UPLOAD NEW PANEL FILE

## 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.



Waiting for User Action - Review Validation Results

Task: 1481  
08/30/2019 1:58 pm  
20 total rows

PARSE: 20 complete      VALIDATE: 20 complete      MFI: Waiting...      COMMENT: Waiting...

Review Panel

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

Roster File Upload Complete

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

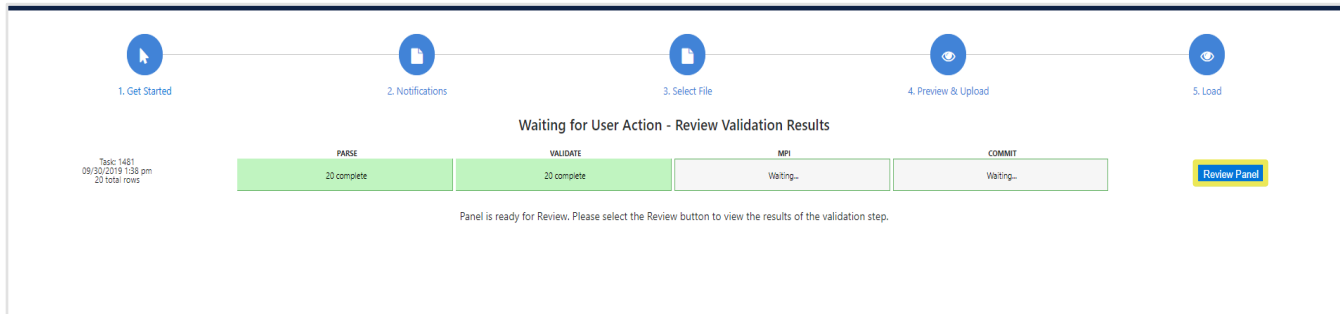
Close

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

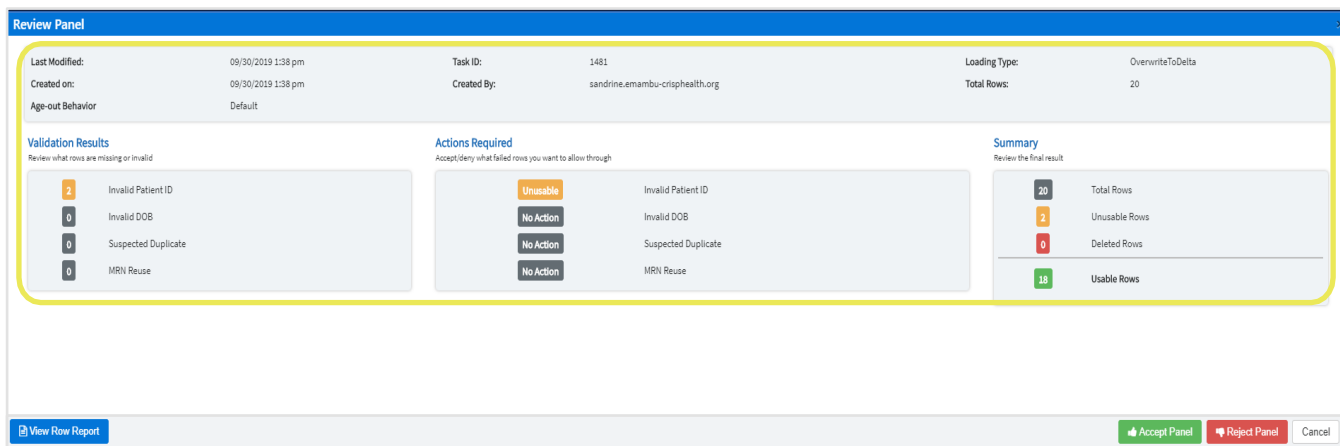
1. Get Started 2. Notifications 3. Select File 4. Preview & Upload 5. Load

Waiting for User Action - Review Validation Results

PARSE	VALIDATE	MPR	COMMIT
20 complete	20 complete	Waiting...	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

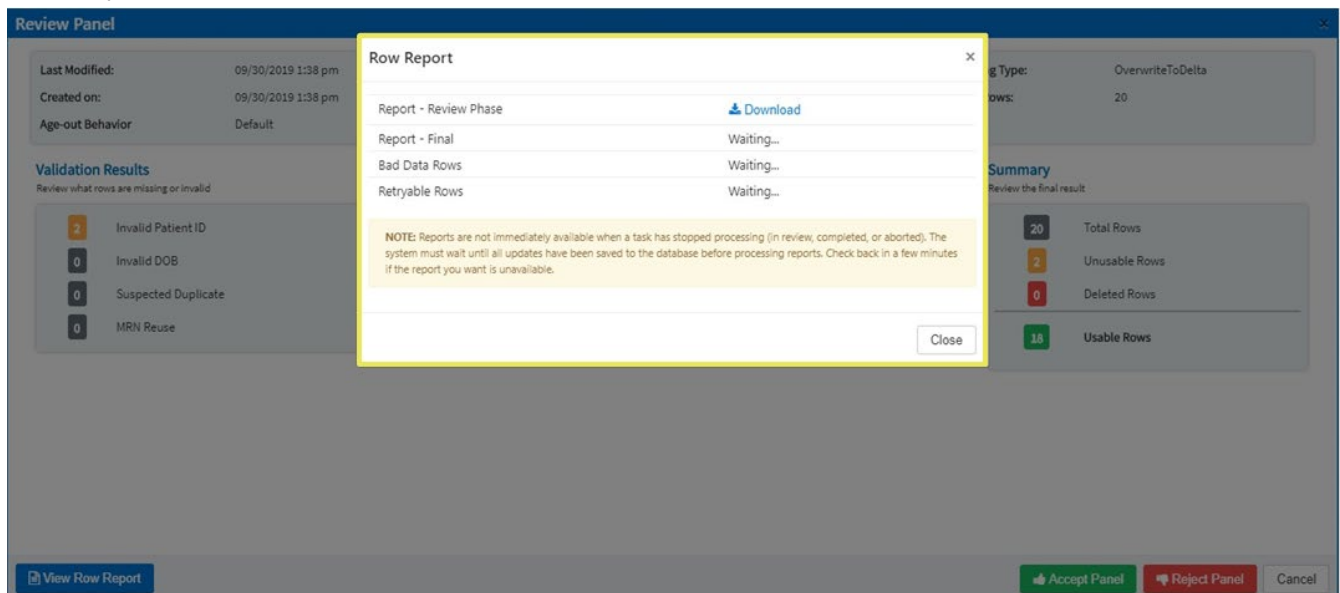
**Summary**  
Review the final result

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.



**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](#)

**Row Report**

Report - Review Phase [Download](#)

Report - Final Waiting...

Bad Data Rows Waiting...

Retryable Rows Waiting...

**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.

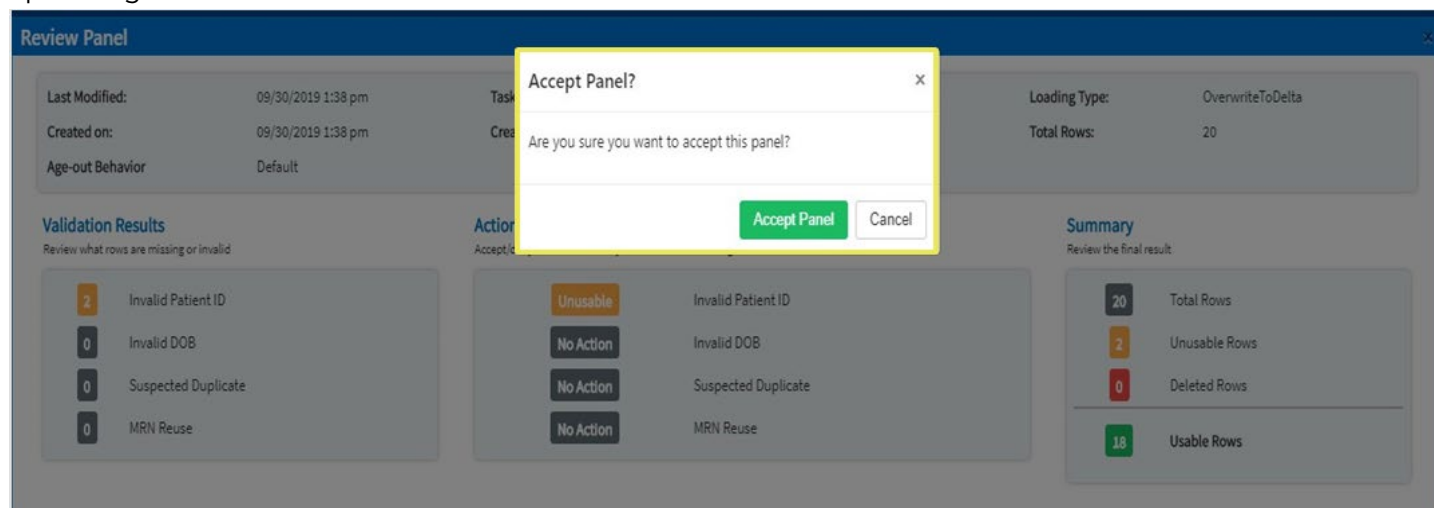
[Close](#)

## 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.



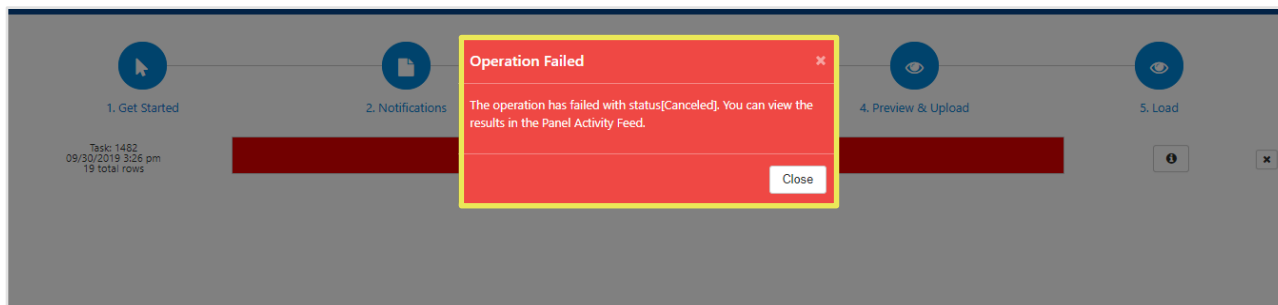
## Step 9

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

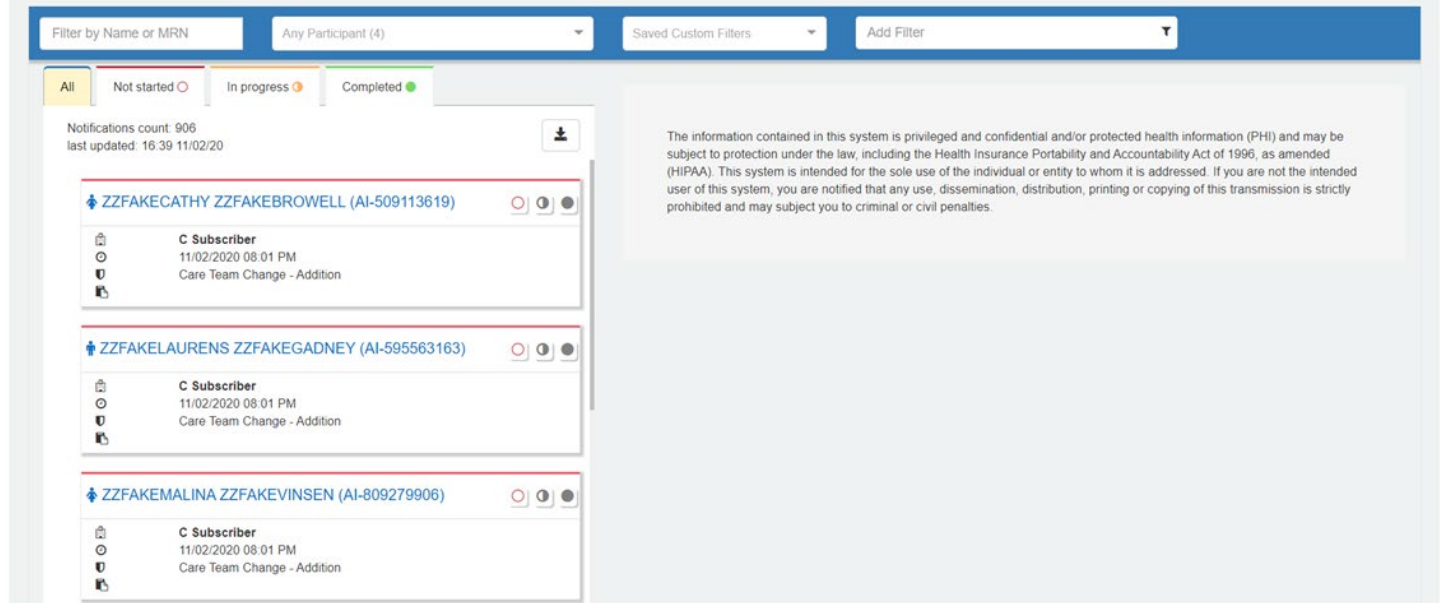


## Step 10

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.

### III. CREATING FILTERS IN THE NC\*NOTIFY DASHBOARD

#### Basic View



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

All Not started In progress Completed

Notifications count: 906  
last updated: 16:39 11/02/20

ZZFAKECATHY ZZFAKEBROWELL (AI-509113619)  
 C Subscriber  
 11/02/2020 08:01 PM  
 Care Team Change - Addition

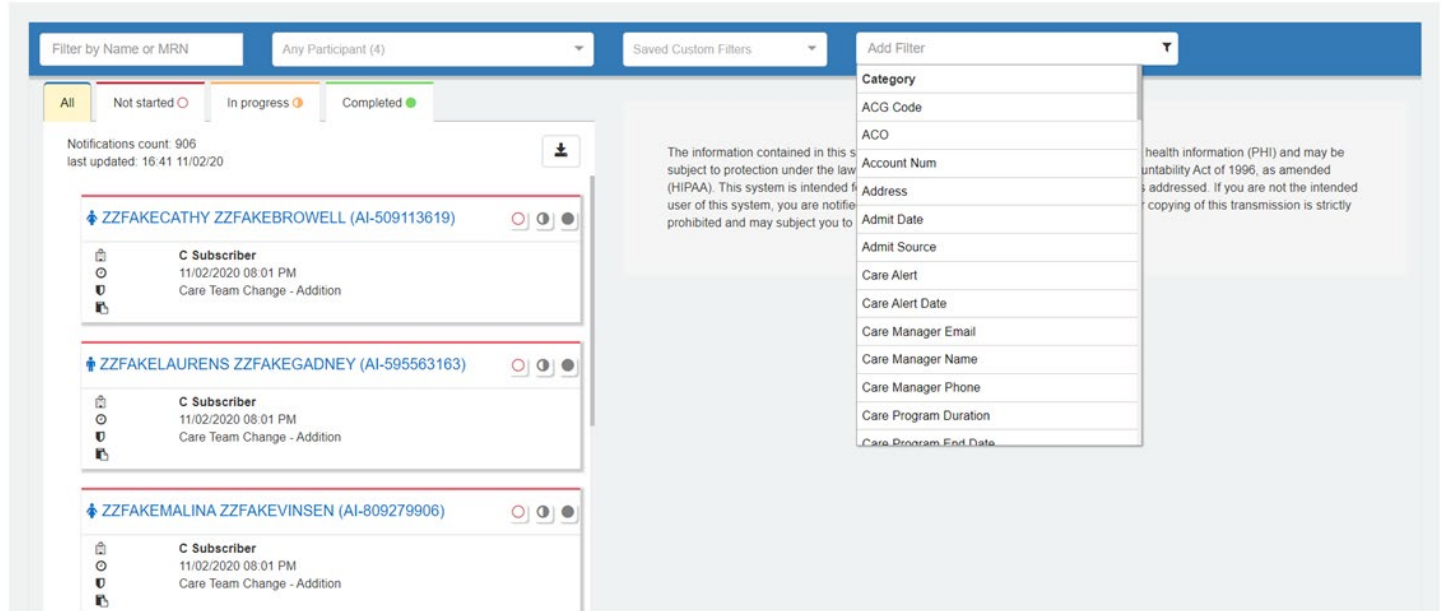
ZZFAKELAURENS ZZFAKEGADNEY (AI-595563163)  
 C Subscriber  
 11/02/2020 08:01 PM  
 Care Team Change - Addition

ZZFAKEMALINA ZZFAKEVINSSEN (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.

#### Step 1

Select the drop down titled "Add Filter":



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

All Not started In progress Completed

Notifications count: 906  
last updated: 16:41 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 ZZFAKEVINSSEN (AI-809279906)  
 C Subscriber  
 11/02/2020 08:01 PM  
 Care Team Change - Addition

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  
 Care Program End Date

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.

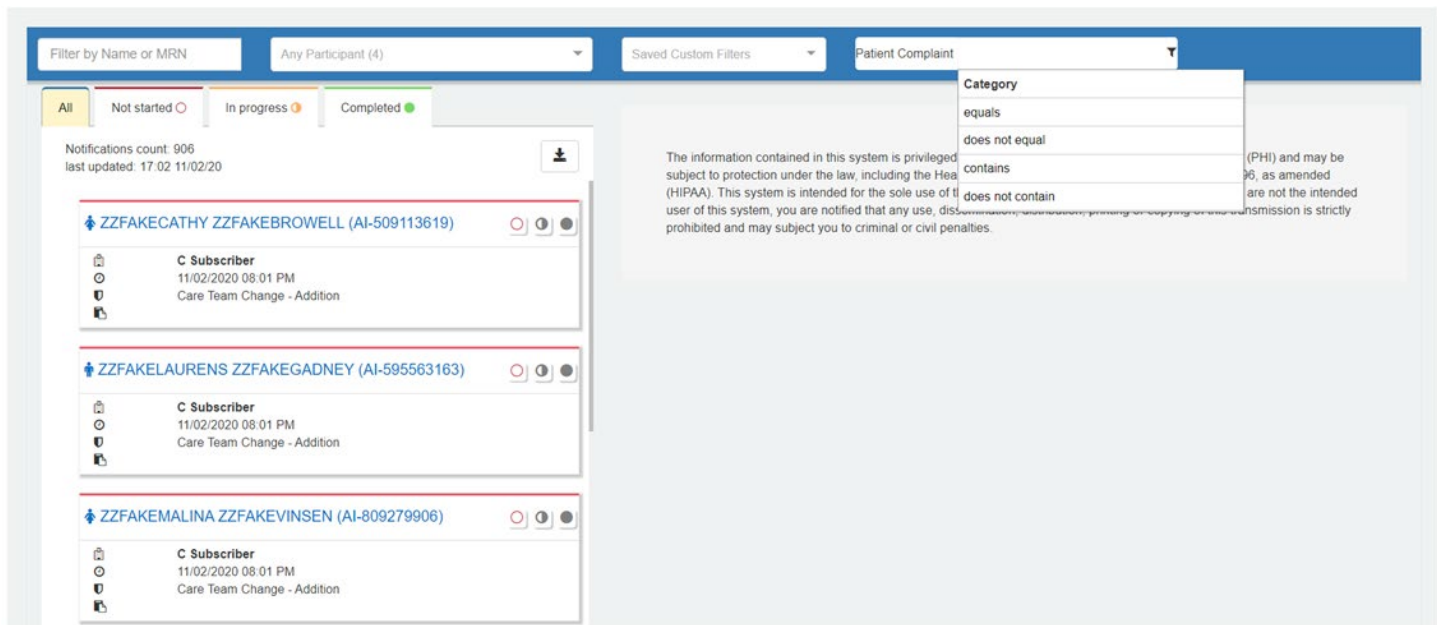
## Filter Options

Options				
Account Num	Cell Phone	Discharge to Location	Last Name	Patient Complaint Code
Address	City	Event Date	Location	Patient Identified Provider ID
Admit Date	Consulting Provider Name	Event Facility	MRN	Patient Identified Provider Name
Admit Source	Date of Birth	Event Type	Middle Name	Practice Name
Admitting Provider ID	Death Indicator	Facility	Number of ER Visits	Referring Provider ID
Admitting Provider Name	Department	First Name	Number of IP Visits	Referring Provider Name
Alert Note 1	Diagnosis Code	Full Name	Observation Status	Source MRN
Alert Type	Diagnosis Description	Gender	Organization	State
Attending Provider ID	Discharge Date	Home Phone	Patient Class	Work Phone
Attending Provider Name	Discharge Disposition	Hospital Service	Patient Complaint	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).

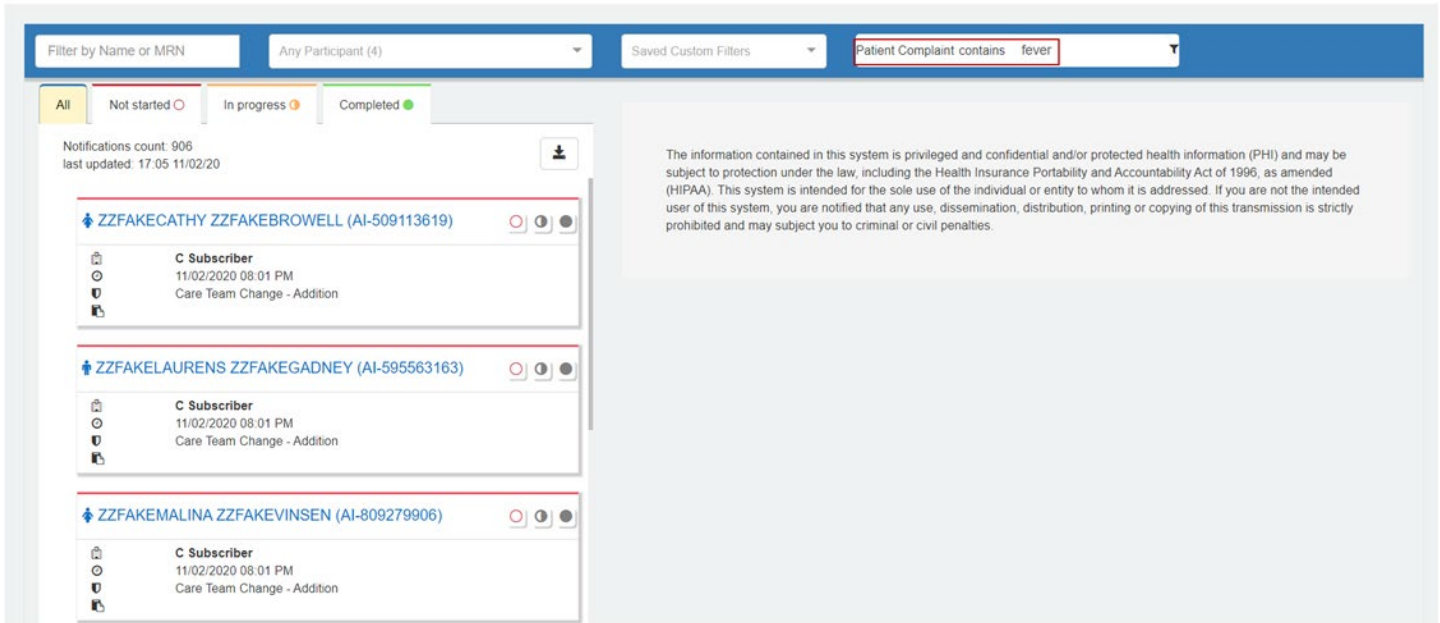


The screenshot shows the NC HealthConnex NC\*Notify interface. At the top, there is a search bar with the text "Filter by Name or MRN" and a dropdown menu showing "Any Participant (4)". To the right of the search bar is a "Saved Custom Filters" dropdown and a "Patient Complaint" dropdown menu. The "Patient Complaint" dropdown is open, showing a list of categories: "equals", "does not equal", "contains", "does not contain", and "is not". The "contains" option is selected. Below the search bar, there are three tabs: "All", "Not started", "In progress", and "Completed". The "All" tab is selected. On the left side, there is a notification count of 906, last updated on 11/02/2020 at 17:02. Below the notification count, there are three patient cards. Each card shows a patient's name (ZZFAKECATHY ZZFAKEBROWELL, ZZFAKELAURENS ZZFAKEGADNEY, and ZZFAKEMALINA ZZFAKEVINSIN), their AI number, and their status as "C Subscriber". The status is "C Subscriber" and the date is "11/02/2020 08:01 PM". The reason for the status change is "Care Team Change - Addition". On the right side, there is a privacy notice: "The information contained in this system is privileged subject to protection under the law, including the Health Insurance Portability and Accountability Act (HIPAA). This system is intended for the sole use of the user of this system, you are notified that any use, disclosure, or transmission of this information is strictly prohibited and may subject you to criminal or civil penalties." Below the privacy notice, there is a small text: "(PHI) and may be 36, as amended are not the intended transmission is strictly".



### Step 3

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



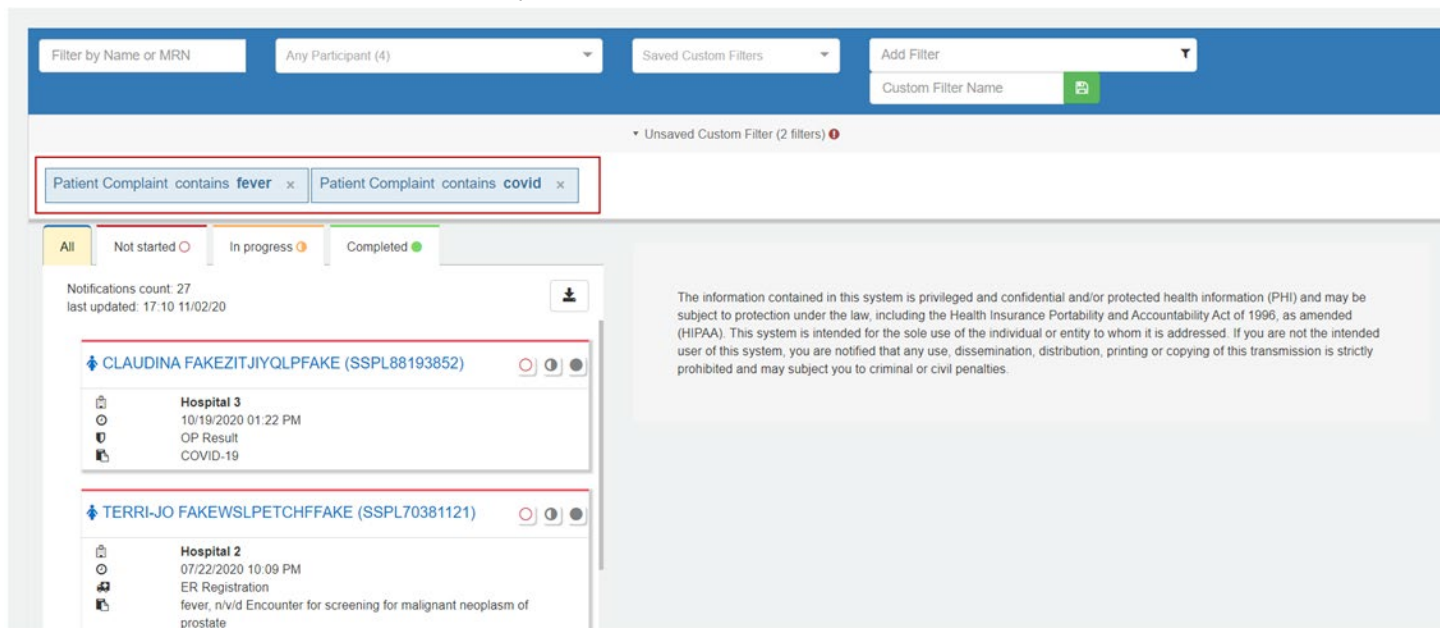
The screenshot shows the NC HealthConnex interface. At the top, there is a search bar with the text "Filter by Name or MRN". To the right of the search bar, there are two dropdown menus: "Any Participant (4)" and "Saved Custom Filters". Further right, there is a search filter box with the text "Patient Complaint contains fever". Below the search bar, there are three tabs: "All", "Not started", "In progress", and "Completed". The "All" tab is selected. On the left side, there is a notification count of 906, last updated on 17:05 11/02/20. The main content area displays three patient notifications, each with a patient name and ID, a status icon, and a description of the notification. The first notification is for ZZFAKECATHY ZZFAKEBROWELL (AI-509113619), the second is for ZZFAKELAURENS ZZFAKEGADNEY (AI-595563163), and the third is for ZZFAKEMALINA ZZFAKEVINSEN (AI-809279906). All three notifications are marked as "C Subscriber" and "Care Team Change - Addition". On the right side, there is a disclaimer text: "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 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.

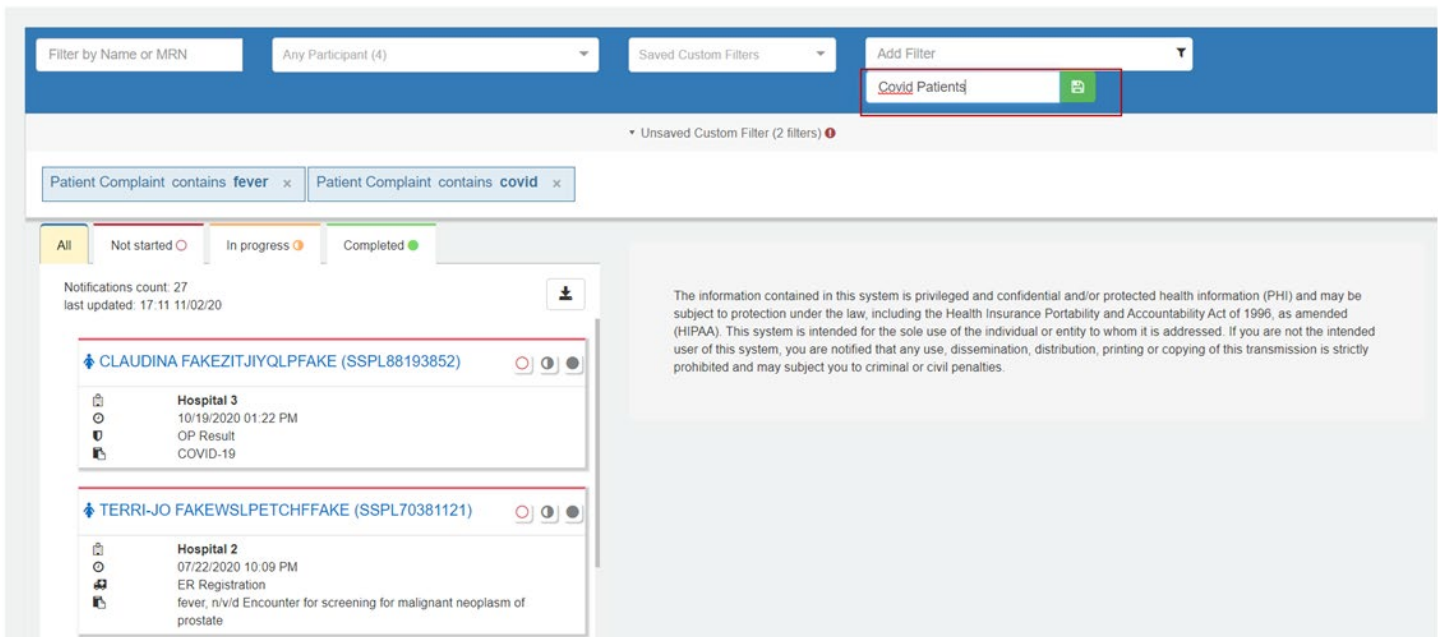


The screenshot shows the NC HealthConnex interface with a custom filter applied. At the top, there is a search bar with the text "Filter by Name or MRN". To the right of the search bar, there are two dropdown menus: "Any Participant (4)" and "Saved Custom Filters". Further right, there is a search filter box with the text "Add Filter". Below the search bar, there are three tabs: "All", "Not started", "In progress", and "Completed". The "All" tab is selected. On the left side, there is a notification count of 27, last updated on 17:10 11/02/20. The main content area displays two patient notifications, each with a patient name and ID, a status icon, and a description of the notification. The first notification is for CLAUDINA FAKEZITJIYQLPFAKE (SSPL88193852), the second is for TERRI-JO FAKESLWLPETCHFFAKE (SSPL70381121). The first notification is marked as "Hospital 3" and "COVID-19". The second notification is marked as "Hospital 2" and "ER Registration". On the right side, there is a disclaimer text: "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 5

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



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

Custom Filter Name: 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 FAKEZITJIYQLPFAKE (SSPL88193852)

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

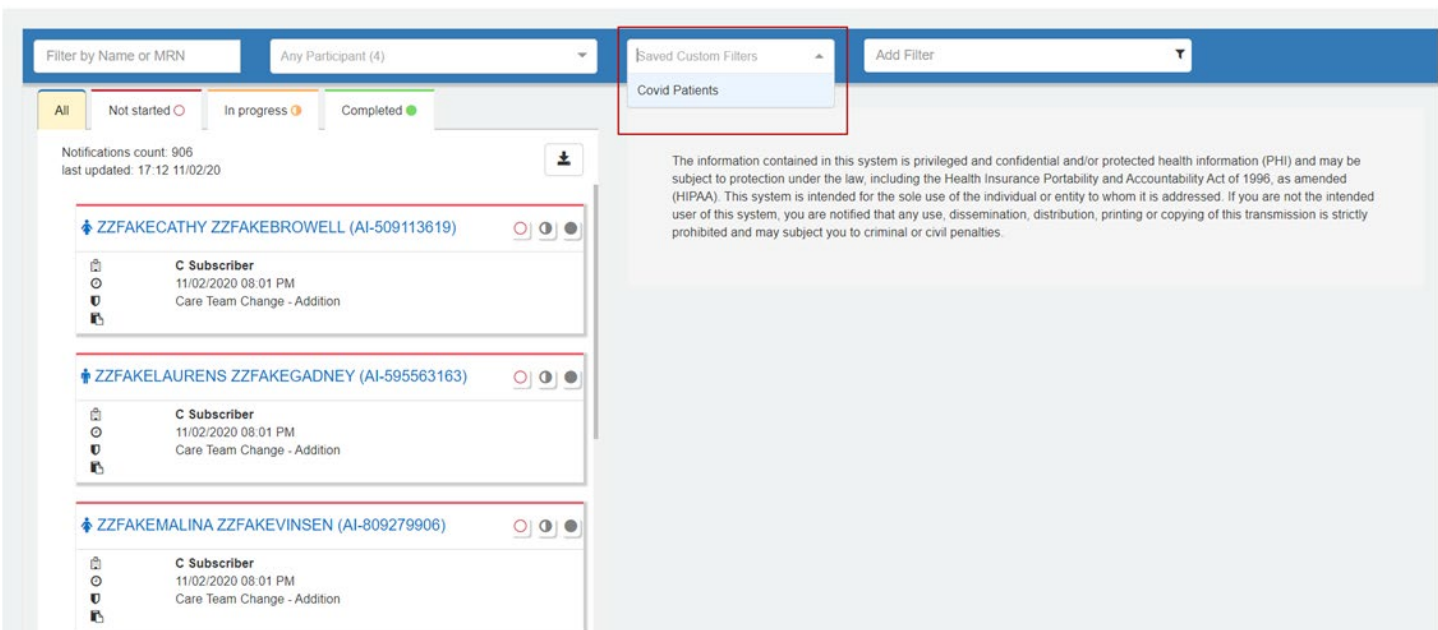
TERRI-JO FAKESWLPETCHFFAKE (SSPL70381121)

Hospital 2  
07/22/2020 10:09 PM  
ER Registration  
fever, n/v/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.



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

Saved Custom Filters: 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

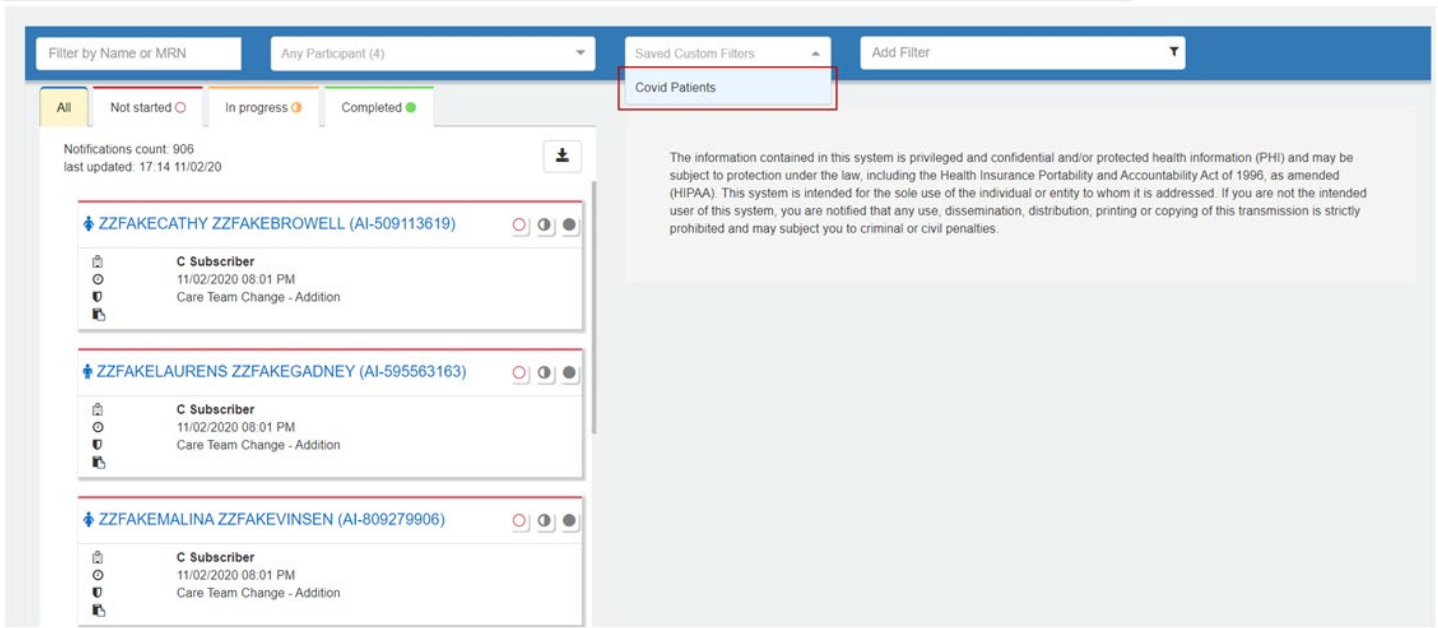
The information contained in this system is privileged and confidential and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This system is intended for the sole use of 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.

## IV. VIEWING NOTIFICATIONS FROM SAVED FILTERS

### Step 1

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

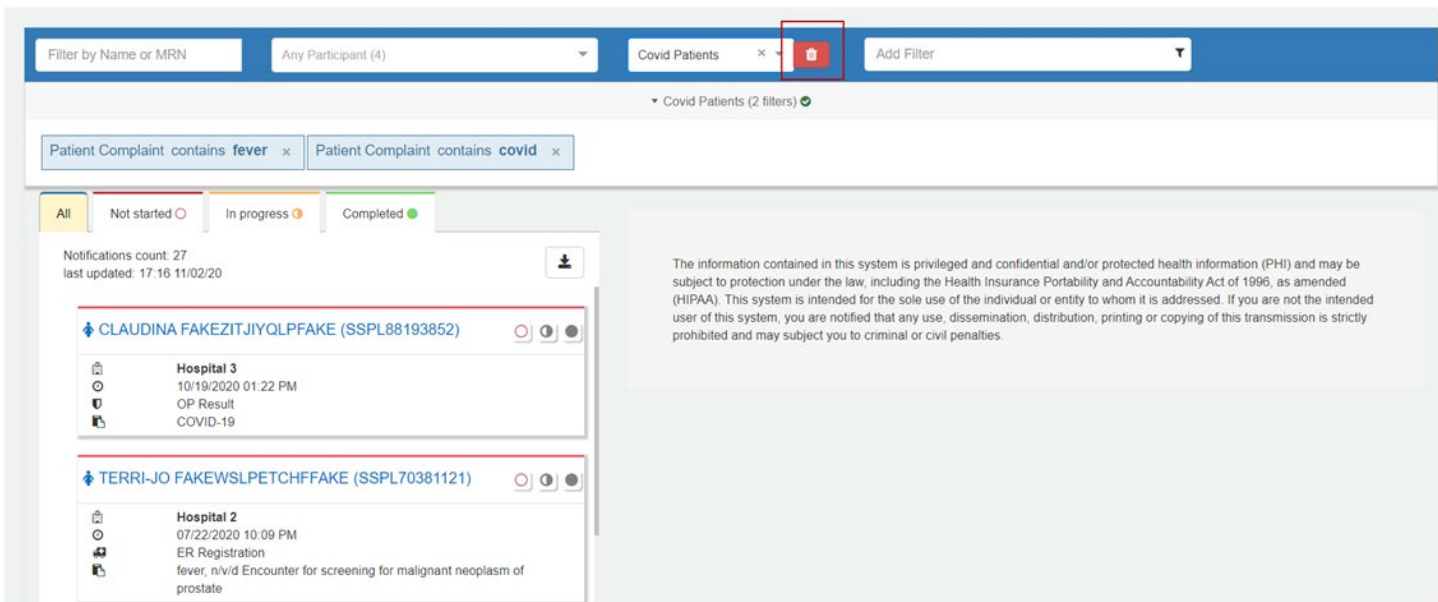
\* Custom filters may be saved and are available in the pulldown "Saved Custom Filters" menu.



The screenshot shows the top navigation bar with a search filter set to 'Any Participant (4)'. A dropdown menu labeled 'Saved Custom Filters' is open, showing 'Covid Patients' as the selected option. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The 'All' tab is active, showing a list of notifications. The first notification is for 'ZZFAKECATHY ZZFAKEBROWELL (AI-509113619)' with a 'C Subscriber' status and a timestamp of '11/02/2020 08:01 PM'. The second notification is for 'ZZFAKELAURENS ZZFAKEGADNEY (AI-595563163)' with a 'C Subscriber' status and a timestamp of '11/02/2020 08:01 PM'. The third notification is for 'ZZFAKEMALINA ZZFAKEVINSSEN (AI-809279906)' with a 'C Subscriber' status and a timestamp of '11/02/2020 08:01 PM'. A privacy notice is displayed on the right side of the screen.

### Step 2

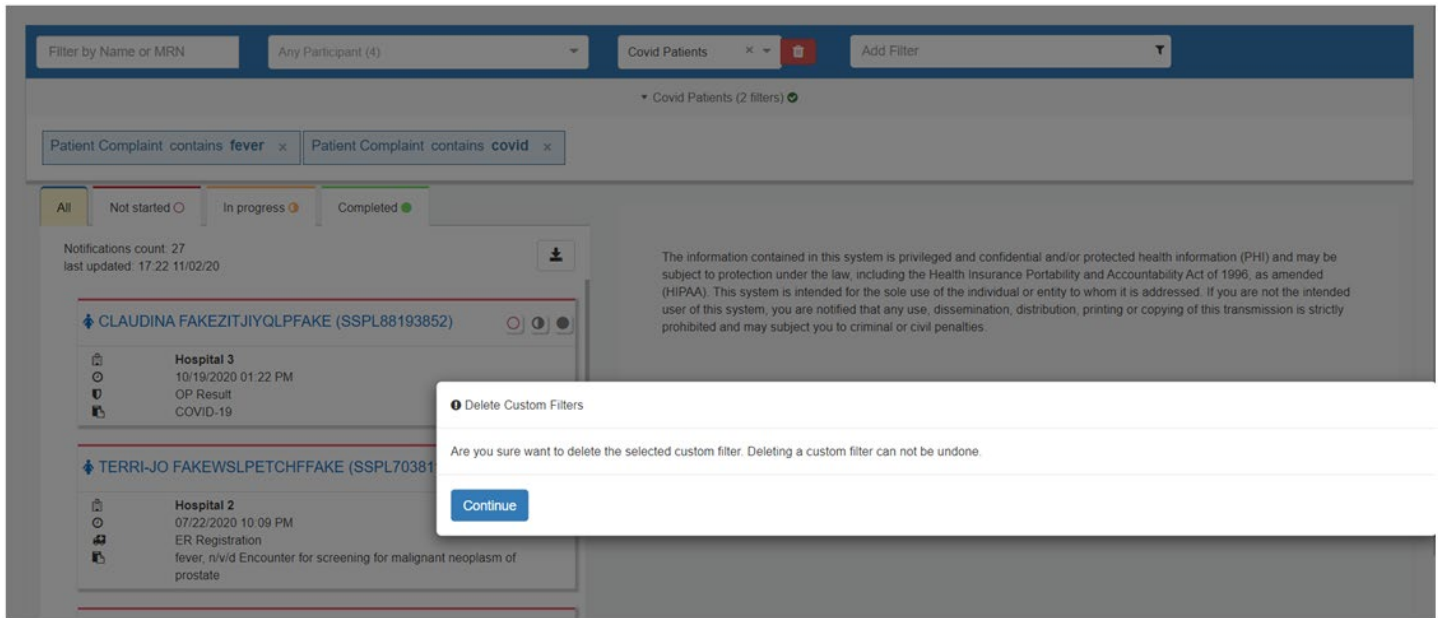
After selecting a filter, the "Trash Can" icon may be used to delete/remove the filter:



The screenshot shows the top navigation bar with the search filter set to 'Covid Patients'. A red box highlights the 'Trash Can' icon next to the filter name. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. The 'All' tab is active, showing a list of notifications. The first notification is for 'CLAUDINA FAKEZITJIYQLPFAKE (SSPL88193852)' with a 'Hospital 3' status and a timestamp of '10/19/2020 01:22 PM'. The second notification is for 'TERRI-JO FAKESLWLPETCHFFAKE (SSPL70381121)' with a 'Hospital 2' status and a timestamp of '07/22/2020 10:09 PM'. A privacy notice is displayed 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.

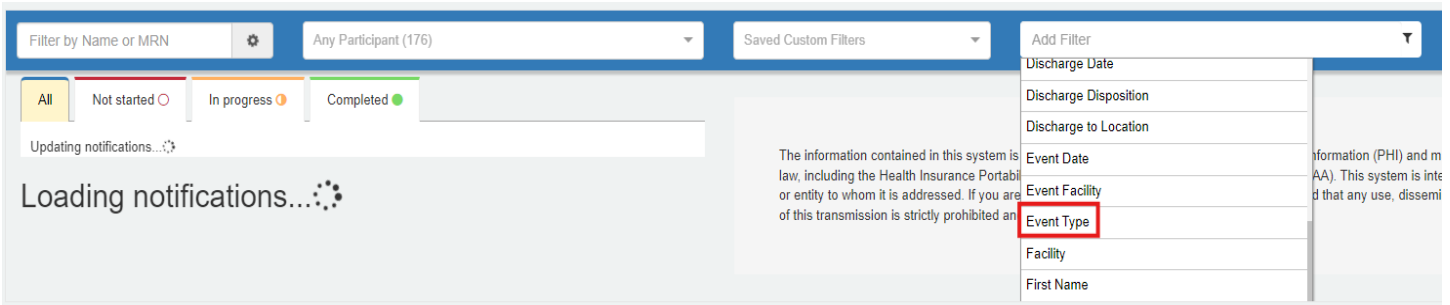


## V. ADDITIONAL FILTER EXAMPLE - Discharges For the Previous Two Days

Providers often need to see their discharges for the previous two days for transitional care management under Medicare. This example will show you how to create this filter.

### Step 1

Select the drop down titled "Add Filter" and then select "Event Type." And then select "equals."



## Step 2

Select “A03: DISCHARGE” from the drop down menu.

The screenshot shows the top navigation bar with filters: 'Filter by Name or MRN', 'Any Participant (176)', 'Saved Custom Filters', and 'Event Type equals'. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. A loading notification says 'Loading notifications...'. A dropdown menu for 'Event Type' is open, showing a list of values: A01: Admission, A02: Patient Transfer, A03: Discharge (highlighted with a red box), A04: Patient Registration, A05: Patient pre-admission, A06: Transfer, and A07: Change an Inpatient to Outpatient.

## Step 3

Select the drop down titled “Add Filter” and then select “Event Date.”

The screenshot shows the top navigation bar with filters: 'Filter by Name or MRN', 'Any Participant (176)', 'Saved Custom Filters', and 'Add Filter'. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. A loading notification says 'Loading notifications...'. A dropdown menu for 'Add Filter' is open, showing a list of values: Department, Diagnosis Code, Diagnosis Description, Discharge Date, Discharge Disposition, Discharge to Location, Event Date (highlighted with a red box), Event Facility, and Event Type.

## Step 4

Select “>=” (greater than or equal to) from the drop down menu.

The screenshot shows the top navigation bar with filters: 'Filter by Name or MRN', 'Batish Family Medicine', 'Saved Custom Filters', and 'Event Date'. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. A loading notification says 'Loading notifications...'. A dropdown menu for 'Event Date' is open, showing a list of values: equals, does not equal, <, <=, >, and >= (highlighted with a red box).

## Step 5

Today’s date will be highlighted in blue. Select the date from two days ago.

The screenshot shows the top navigation bar with filters: 'Filter by Name or MRN', 'Batish Family Medicine', 'Saved Custom Filters', and 'Event Date'. Below the navigation bar, there are tabs for 'All', 'Not started', 'In progress', and 'Completed'. A loading notification says 'Loading notifications...'. A dropdown menu for 'Event Date' is open, showing a calendar view for November 2024. The date 8 is highlighted in blue, indicating it is today's date. The date 6 is highlighted with a red box, indicating it is the date from two days ago.

Your filter should be displayed like this:

▼ Unsaved Custom Filter (2 filters)

Event Type equals **A03: Discharge**

Event Date >= **2024-11-06**

## QUESTIONS

- Access the [NC HealthConnex Clinical Portal](#).
- The full NC HealthConnex Clinical Portal User Guide is available at <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.