NC HealthConnex
Powering Health Care Outcomes

NORTH CAROLINA HEALTH INFORMATION EXCHANGE AUTHORITY

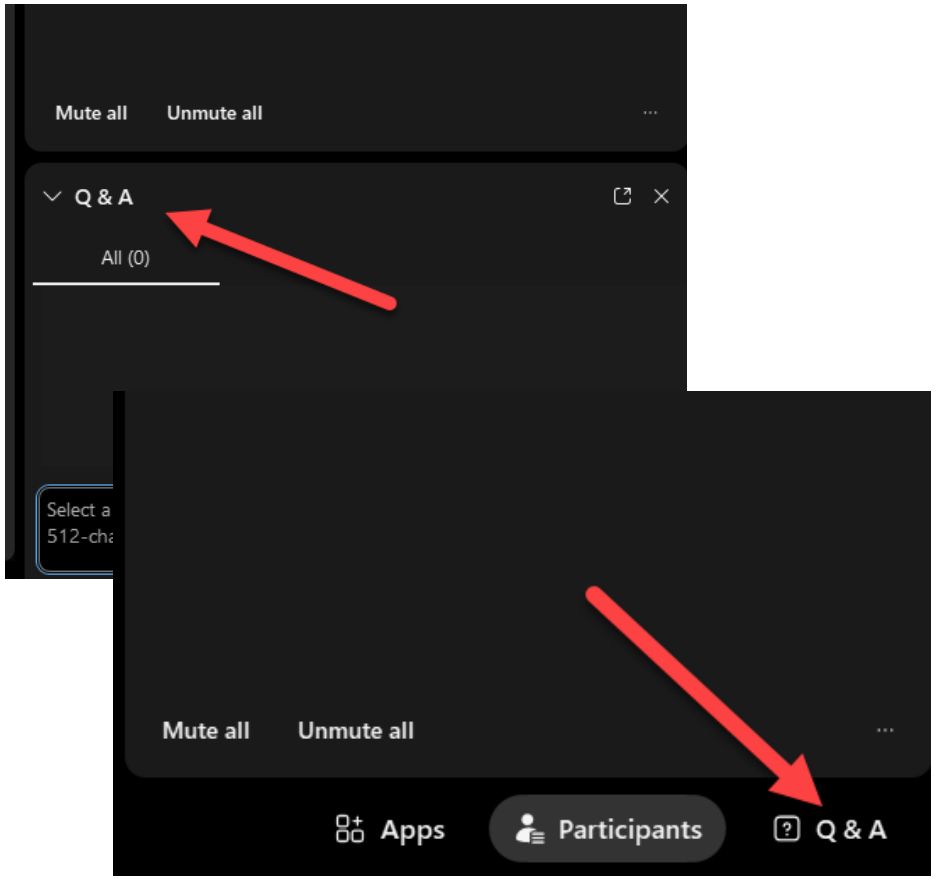
Office Hours

March 13, 2024

Kimberly Webster, Business Development and Outreach Specialist
Luke Keeler, Business Development and Outreach Specialist
Adonnica Rowland, Business Development and Outreach Specialist
Holli Elliott, SAS Helpdesk

NCDIT NORTH CAROLINA DEPARTMENT OF INFORMATION TECHNOLOGY

Housekeeping Items Before We Start



- You can use the zoom feature or to switch to full screen view to increase view size.
- We will review the previously submitted questions before we answer the questions in the chat.
- At the end, if you have a question, you can utilize the Q&A feature.
- A copy of the presentation slides will go out to everyone who registered for today's webinar.

NC HealthConnex Office Hours - Agenda

Overview of Topics

- Welcome and Introductions
- DSM Deep Dive with Holli Elliott, Senior Technical Support Analyst with SAS Institute
- DSM Directory and DSM Highlights
- Pre-Submitted Questions
- Opportunity for Participants to ask Questions
- Conclusion

Staffing Updates

Sam Thompson

Executive Director

Sam Thompson most recently served as the deputy director for program evaluation at NC Medicaid where he oversaw quality measurement, data collection and internal and external program evaluation efforts. He also previously served as a lead evaluator at the N.C. Division of Public Health.

Thompson has worked closely with the NC HIEA for several years and has championed the use of the health information exchange by Medicaid and the health care community. He will assume his new role on Monday, March 4, 2024

NC HIEA Outreach Team Members

Tim Taylor
Business Relationship Manager

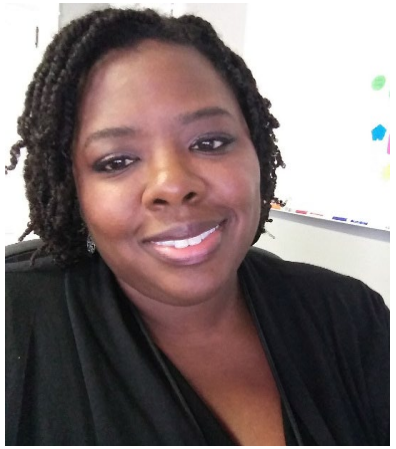
Tim has 10 years of health care operations leadership and management experience and serves as a liaison for healthcare providers and organizations across North Carolina.

Kimberly Webster
Business Development Specialist

Kim started with the NC HIEA in 2022. She assists participants in understanding how to access and utilize NC HealthConnex. Kim has worked as a nurse since 2004 and maintains her nursing license.

Luke Keeler
Business Development Specialist

Luke Keeler has 15 years of experience working in public health at local health departments and NC DHHS. He joined the NC HIEA in 2023.



Kenya Servia
Business Development Specialist

Kenya Servia has worked at the NC HIEA since April 2018, educating health care providers about NC HealthConnex. She has over 25 years experience working in public health as a social worker, health educator and program consultant.

Introducing New Team Members

Adonnica Rowland

Business Development and Outreach Specialist

We welcome Adonnica Rowland to the NC HIEA as our newest Business Development Specialist. Adonnica has worked in both private and public sectors in health IT and health informatics since 2012. Her private sector experience has given her expertise to assist in statewide programs and projects. She previously served the state through roles at NCDHHS, the Office of NC Fast, UNC General Administration and UNC Chapel Hill. Adonnica joined the NC HIEA outreach team in December 2023.

Guest Speaker Introduction

Holli Elliott

SAS Help Desk – Senior Technical Support Analyst

Holli has 12 years of experience working in health care IT. She has been a technical support analyst on the SAS NC HealthConnex Help Desk since 2017. Prior to working in the health care industry, Holli was a special education teacher with Wake County Public Schools.

Credentialing Process

NC HealthConnex Portal Credentials

If you are a Participant Account Administrator (PAA) for your organization, contact the NC HealthConnex Help Desk Team to request an account.

The Help Desk will follow-up by creating an NC HealthConnex portal account for you. By default, you will be assigned the PAA role. This role only allows you to view a list of users associated with your organization.

If you need access to patient records, please request either the Clerical or Clinical role be added to your account.

- Clerical – patient demographics
- Clinical – full patient records

After your account has been created, the Help Desk will send you instructions for requesting accounts for your providers and staff.

User Account Management

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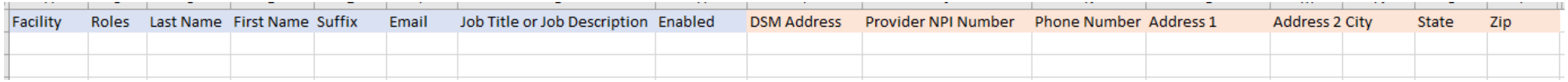
User Account Management – Creating New User Accounts

To create new user accounts for members of your staff, you will need to complete the following fields in the **User Management spreadsheet**. Please do NOT delete any rows or columns.

Please note: This spreadsheet is updated from a previous version.



Facility	Roles	Last Name	First Name	Suffix	Email	Job Title or Job Description	Enabled	DSM Address	Provider NPI Number	Phone Number	Address 1	Address 2	City	State	Zip

- Facility Name – as it appears on your Participation Agreement
- Roles – Select a role from the drop-down menu.
- User First and Last Name
- Job Description – e.g., Clinician, Billing Manager, Office Manager, etc.
- Enabled – True – Contact the Help Desk if you need a user disabled.
- DSM – Yes – After you have enrolled in the service, fill out the DSM (orange fields) for users for whom you want us to create a DSM address.

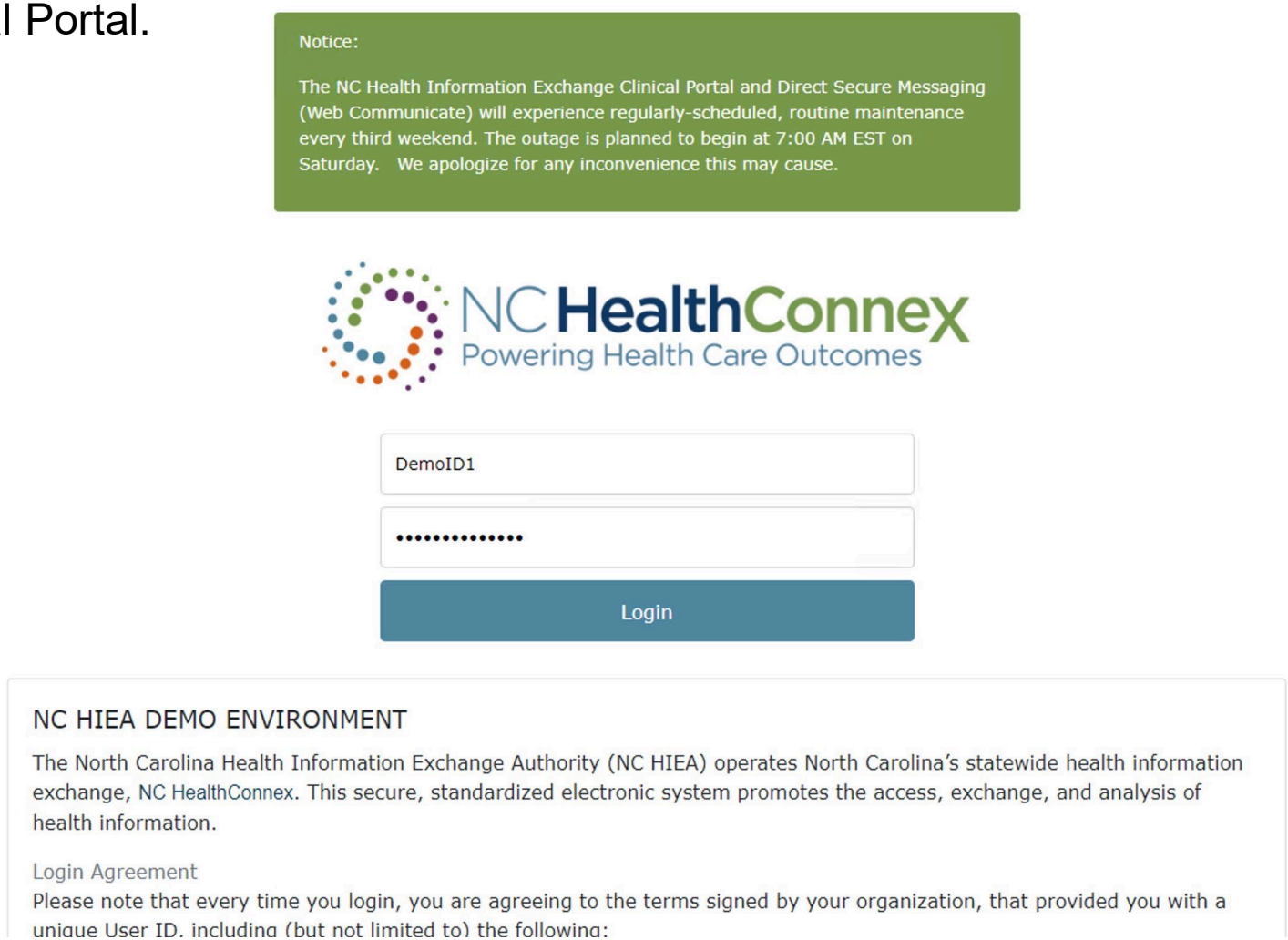
If you need the spreadsheet template, please reach out to the SAS Help Desk Team at HIESupport@sas.com.

User Account Management - Functional Roles

Level	Description	Common Examples
%HS_Clinician	This level of access is assigned to a credentialed health care provider or someone who works under a credentialed health care provider to provide patient care functions.	• Physician • Physician Assistant • Nurse Practitioner • Nurse • Resident or Intern • Therapist • Pharmacist • Medical Records • Medical Assistants
%HS_Clerical	This level of access is assigned to a user who may access the Clinical Portal to search for patients and verify demographics. This level of user may not access clinical data.	• Practice Manager • Administrator • Billing Clerk • Registration Staff
%HS_PAA User Administrator	This level of access is assigned to a user who maintains NC HealthConnex Clinical Portal end user accounts for their organization, including password management. This level of user may not access any patient data.	• Participant Account Administrator (PAA) • Health Care Organization (HCO) Staff

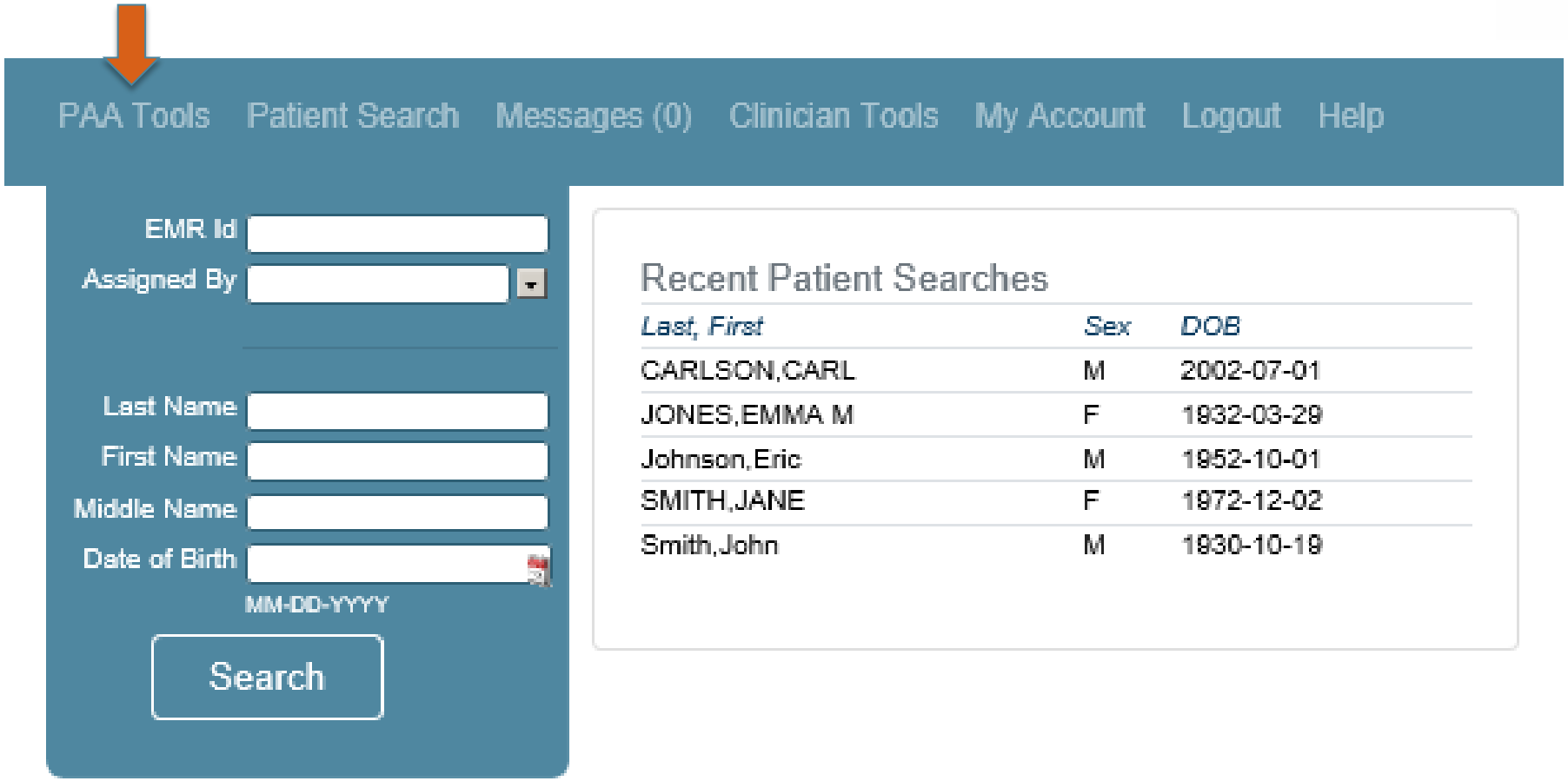
User Management – Submitting a Spreadsheet

Log into the Clinical Portal.



User Management – Submitting a Spreadsheet

PAA + Clinician View



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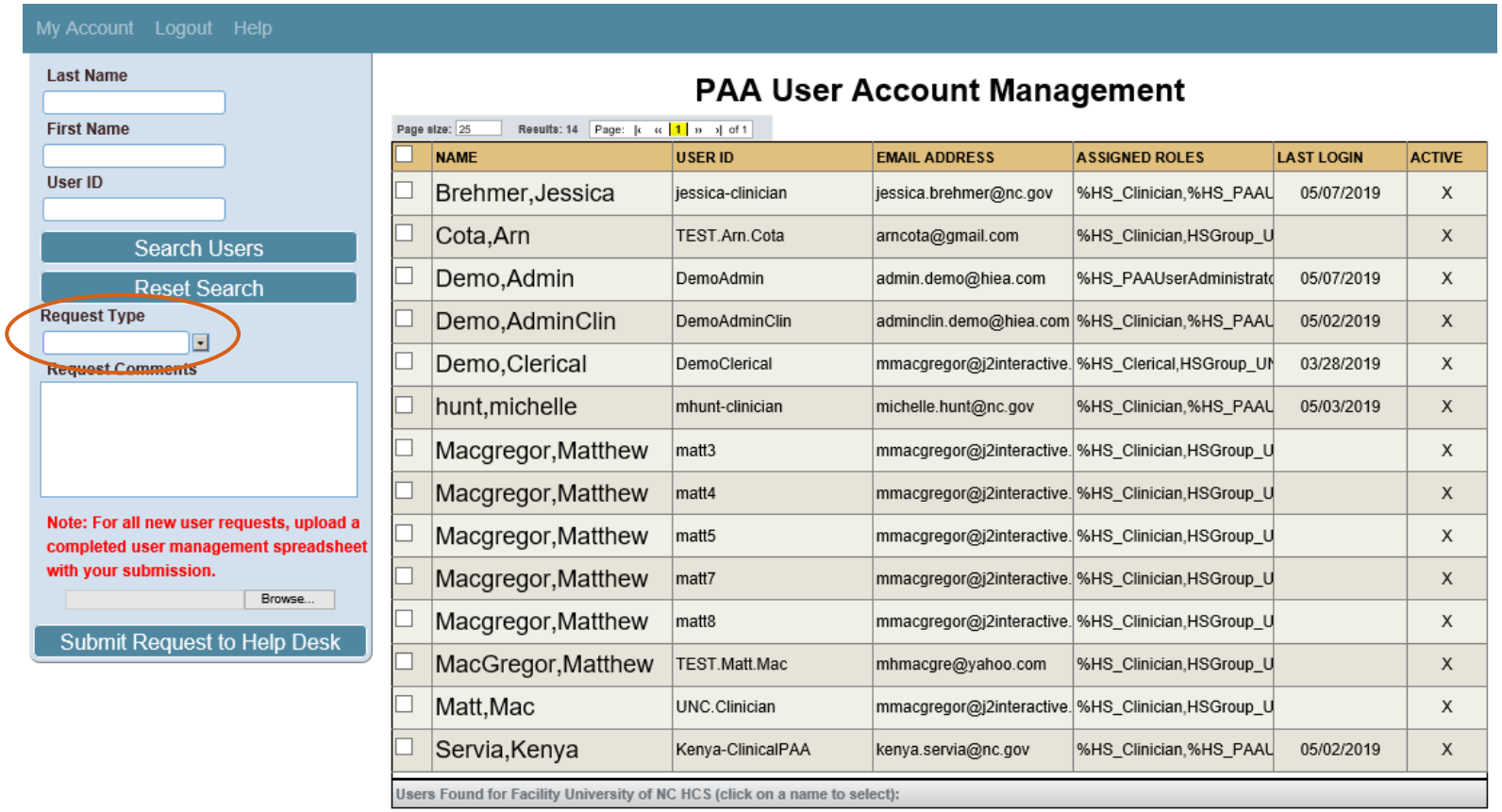
User Management – Submitting a Spreadsheet



To request new accounts, upload the User Management Spreadsheet to the portal OR send the spreadsheet to the Help Desk at hiesuport@sas.com.

To disable a user, send an email to the Help Desk. Include the user(s) name OR submit your request from within your portal account.

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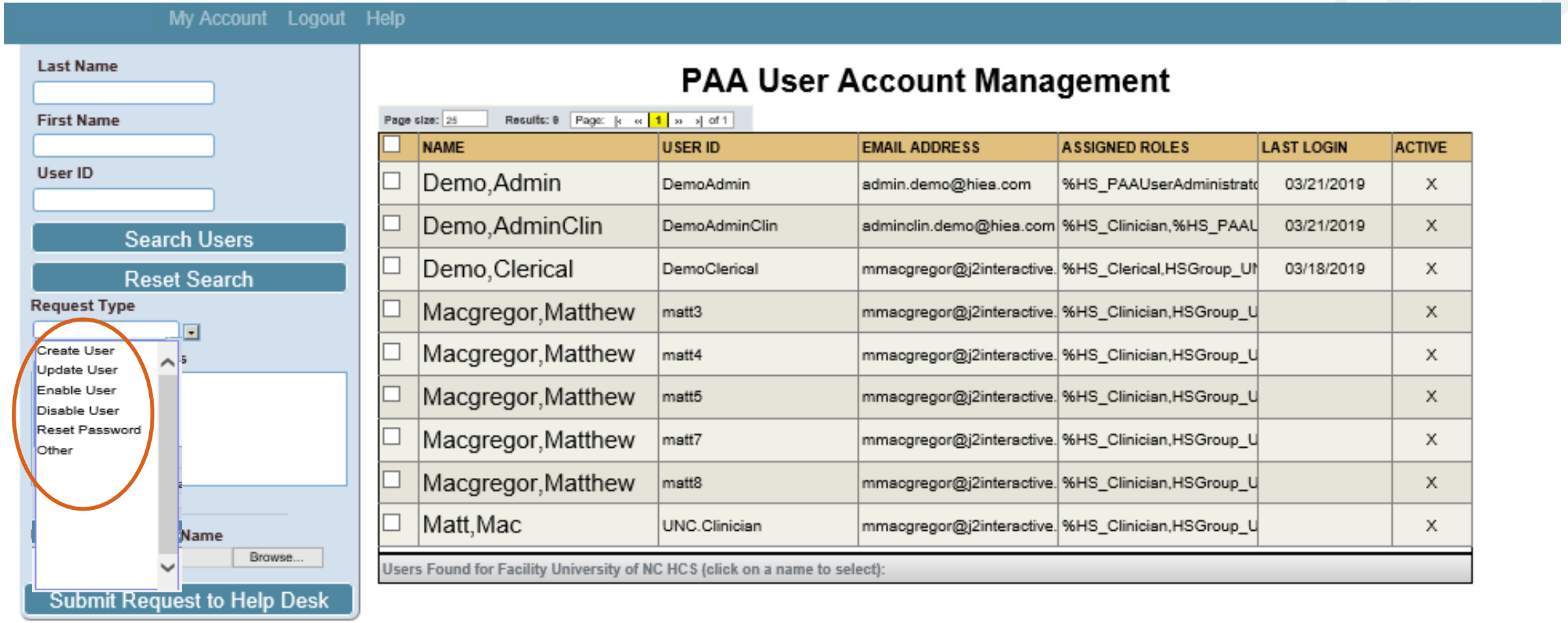
User Management – PAA View



NC HealthConnex Quarterly User Audit

Quarterly User Audit FAQs

How often does the NC HealthConnex User Account Audit occur?

An audit will be performed quarterly. Emails are sent to the PAAs on the second Monday following the beginning of the quarter: January, April, July, October.

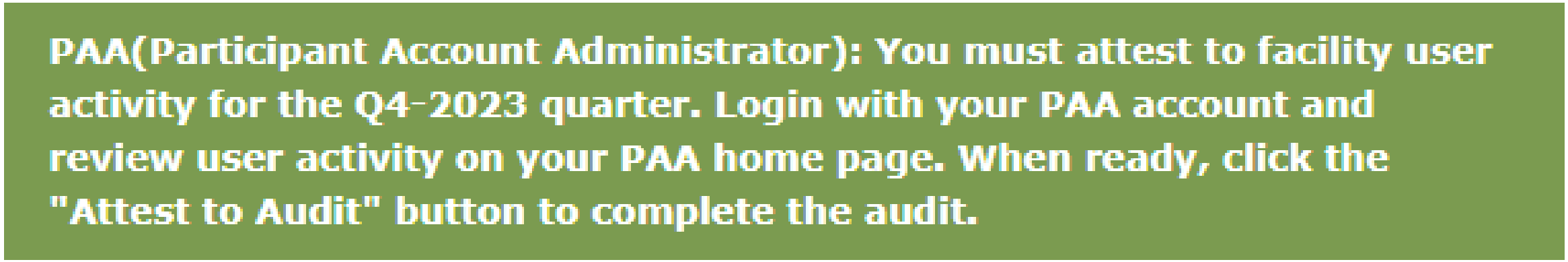
As a PAA, what is my responsibility regarding the Audit?

Click on the PAA Tools tab from within your NC HealthConnex portal account. View a list of users. If any of those listed no longer require access to the portal, send an email to the Help Desk to request the user(s) be disabled.

Note the number of “Patient Search” and “Break the Seal” actions for each user. If a user had an unusual amount of “Break the Seals” and/or Patient Search activity, you are required to report that to the North Carolina Health Information Exchange Authority (NC HIEA).

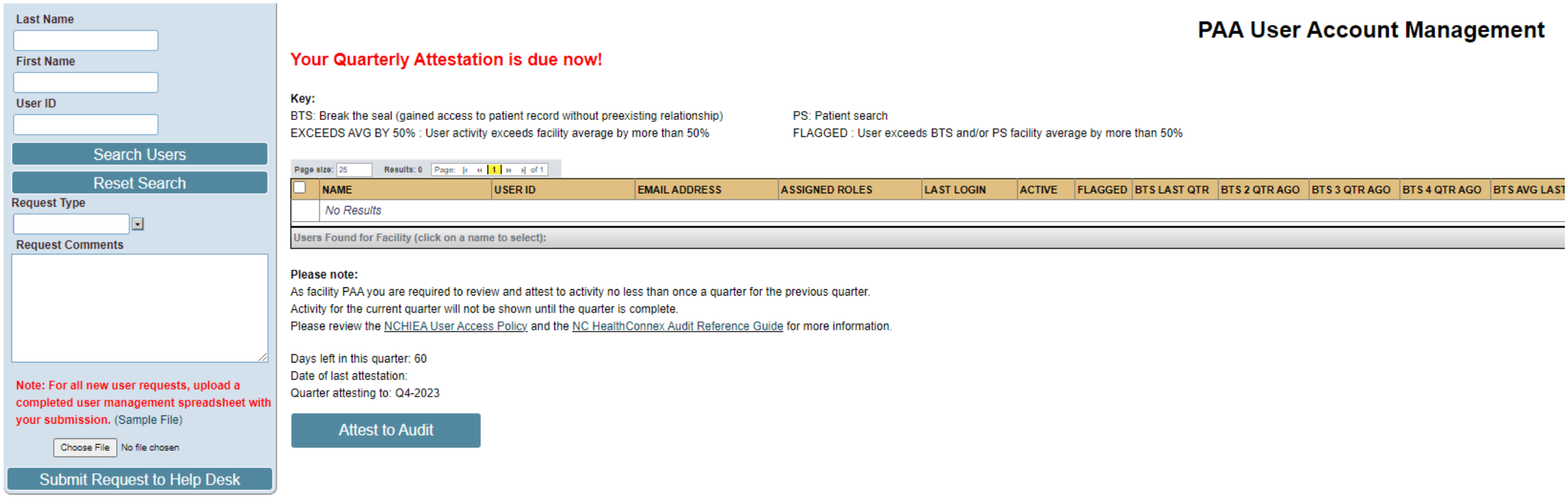
Attesting to the User Audit

At the close of each quarter, an updated portal banner will include a reminder letting you know it is time to attest for the previous quarter's activity:



Attesting to the User Audit

The PAAs Tools Tab will show you a list of users associated with your organization along with Patient Search and BTS-Break the Seal Activity



More Quarterly User Audit FAQs

Why does the NC HIEA require user audits?

To protect both your practice and your patients' data, we want to ensure that NC HealthConnex allows only the appropriate people with the appropriate access to view patient records.

I never log into the portal and/or my facility is not live. Why do I need to attest each quarter?

If any user within your organization has access to the portal, you are required to attest to each quarterly user audit. Access to the portal is unrelated to the status of your connection to NC HealthConnex.

Direct Secure Messaging (DSM)

Direct Secure Messaging Overview

What is Direct Secure Messaging?

DSM is a secure form of email, that allows a provider to send PHI through a secure network to other providers with a DSM account. DSM is commonly used for referrals and transitions of care.

Full Participation Agreement

You must have a Full PA on record with the NC HIEA.

How much does this service cost?

The state does NOT charge for any services!

Enrolling in DSM

Email the help desk team to request a DSM sub-domain.

The Help Desk will send you the Authorized Business Representative (ABR) ID Verification form. There are three sections to be filled out. Detailed instructions are provided when the form is sent to you.

- Section I: Facility name, chosen sub-domain name, etc.
- Section II: Whomever you designate as the ABR. It is helpful if this person is also a PAA. They ABR must have their personal ID verified.
- Section III: Organizational Officer. If you are a sole practitioner, you can sign both sections II and III.

After the ABR's *personal* identity is verified, individual DSM addresses can be created for you and your staff.

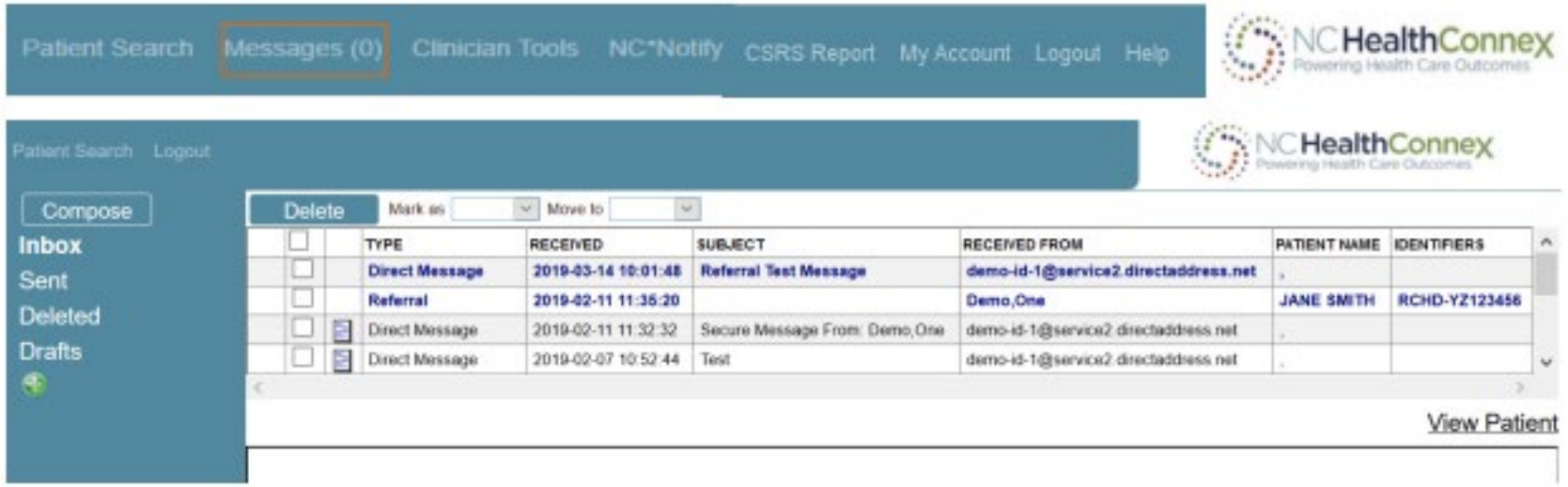
How do I access DSM?

After the DSM sub-domain has been created for your organization, a DSM address will be added to your NC HealthConnex portal account and to the next Provider Directory.

You will access DSM from within your portal account. If you do not have a portal account, one will be created for you.

From within your portal account, you will click on the Message Tab.

The Messaging Center looks very much like a standard webmail application. You will be able to Compose, Reply, Reply All, and Forward Messages. You can also add attachments.



Direct Secure Messaging Provider Directory

The DSM Provider Directory

The Provider Directory is published quarterly. Consider it a “phone book” of DSM addresses.

You as the PAA or ABR will be sent a copy of the DSM Directory for your review. If no changes are required, no further action is needed.

If DSM addresses associated with your facility were created by another HISP-Health Information Service Provider (typically your EMR vendor), contact the HISP to request new addresses be created or old ones deleted. Whatever changes they make should be reported to Direct Trust.

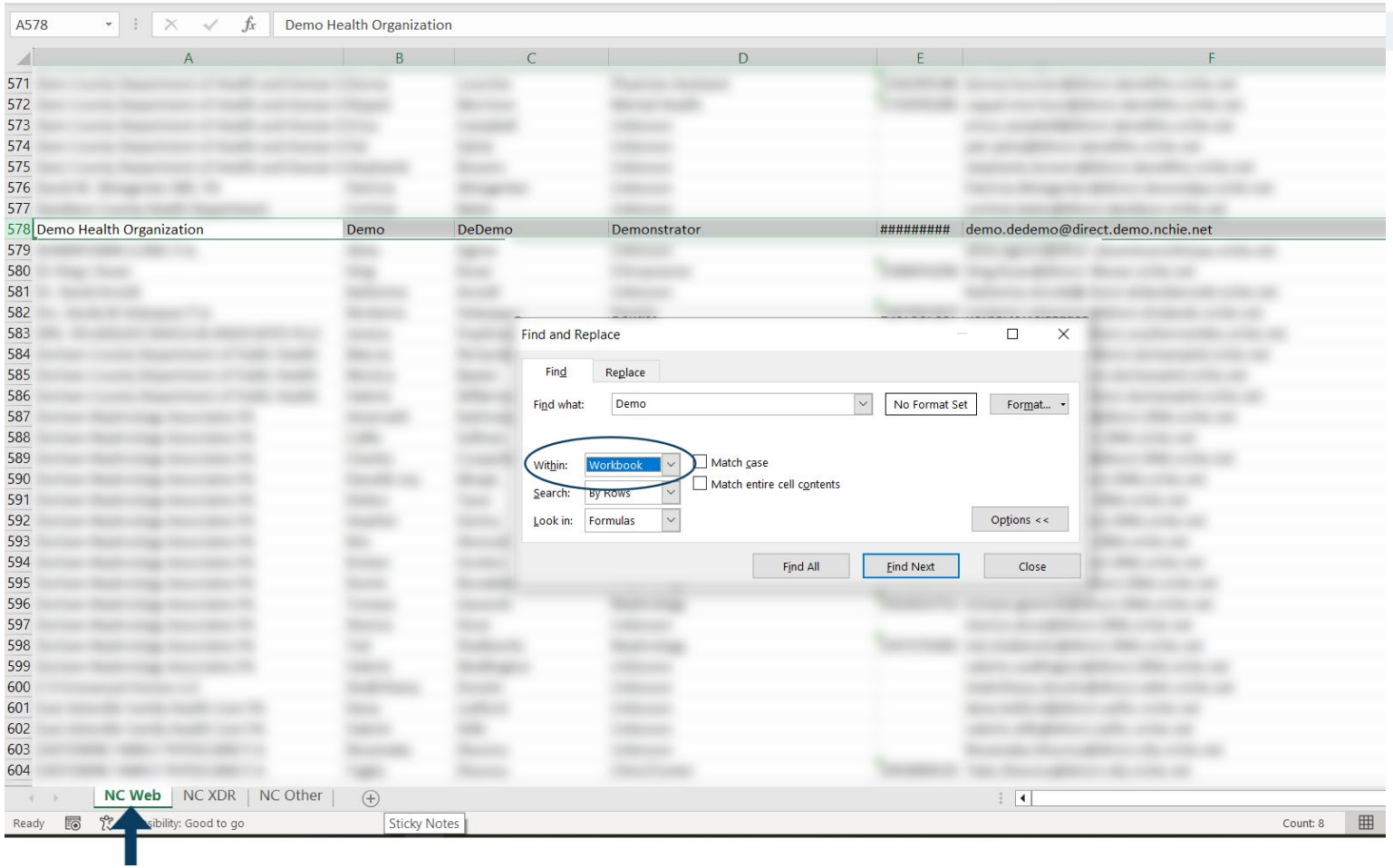
If your DSM address was created by the NCHIE, contact the Help Desk Team to request updates. DSM addresses created by the NCHIE include @direct.nchie.net in the address.

After the deadline to request updates has passed, a new DSM Directory will be published. Copies will be sent to the PAAs and ABRs on record.

DSM Directory Email

Let's talk about DSM and the directory email some of you may get.

1. Open the attached Excel spreadsheet.
2. Search for your DSM address by holding CTRL + F on your keyboard, then typing in your organization name in the search bar. Make sure to search by "Workbook" NOT by "Sheet."



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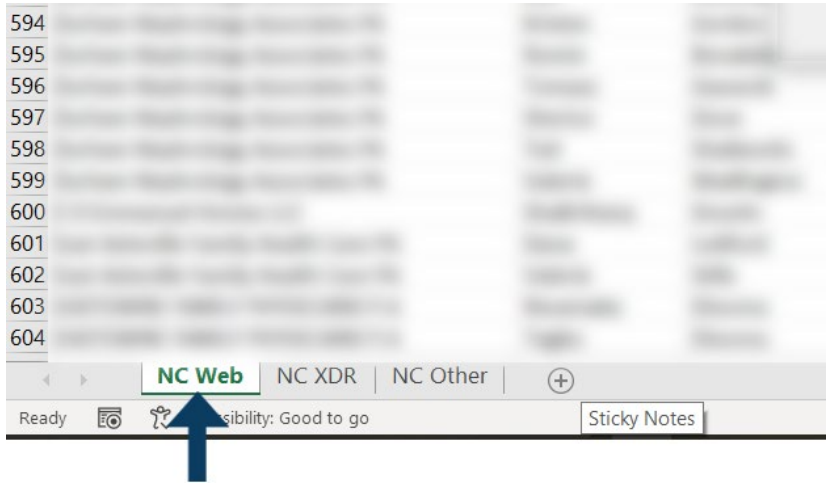
DSM Directory Spreadsheet Tabs



Tab 1: NC Web

If your organization appears in **Tab 1** (meaning you have DSM through NC HealthConnex) and you would like to either disable or add any DSM addresses to the directory, please send an email to the NC HealthConnex Help Desk at HIEsupport@sas.com and include “DSM Directory Change” as the subject.

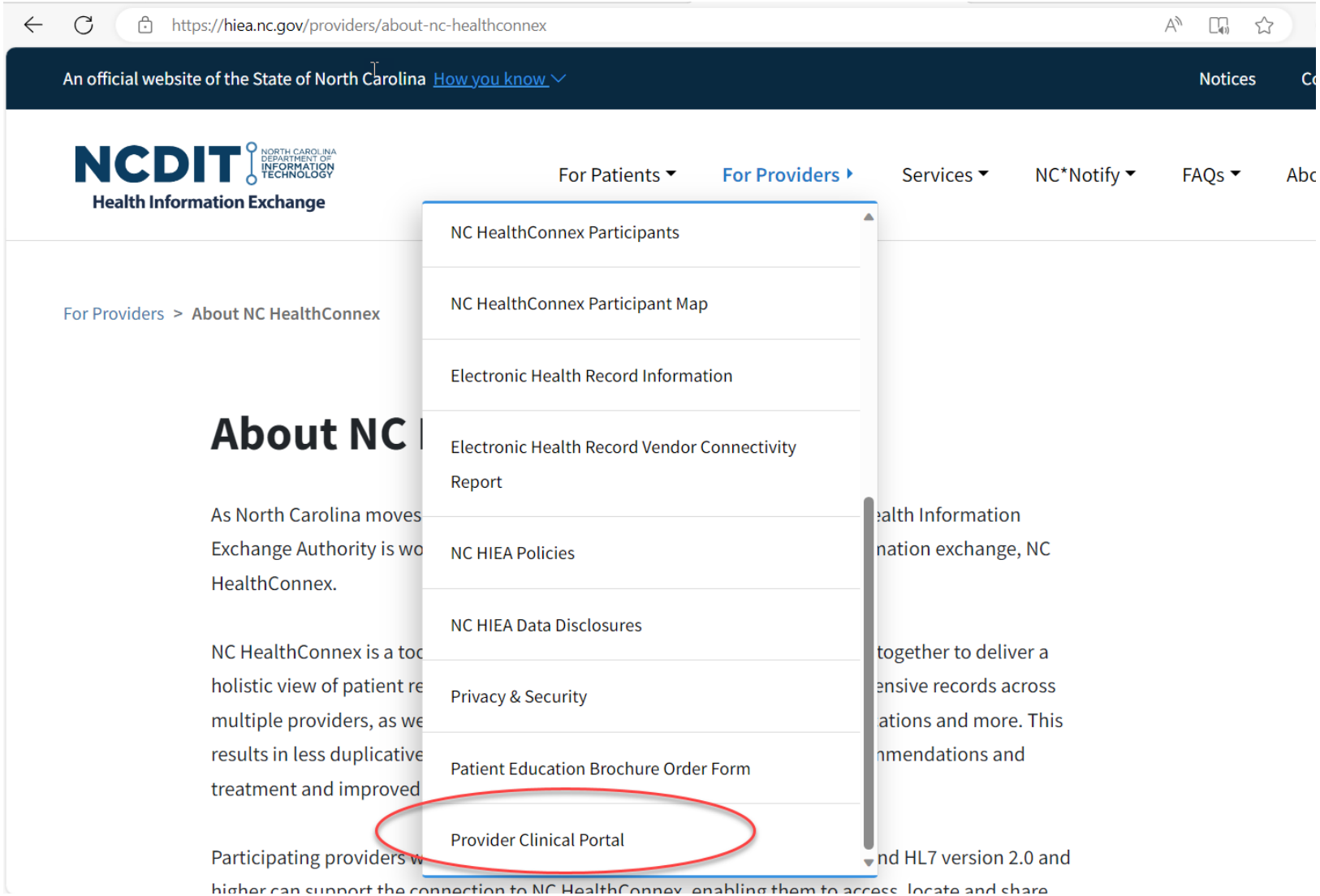
Tab 2: NC XDR

If your organization appears in Tab 2, please use your administrative access to the SES portal to make any changes.

Tab 3: NC Other (HISP)

If your organization appears in Tab 3 (your DSM is through your EMR vendor, please contact your HISP – Health Internet Service Provider (your EMR vendor) to request any changes. Please ask your EMR vendor to report these changes to DirectTrust. The NC HealthConnex Help Desk Team cannot make these changes for you.

DSM – How do you get to it?



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DSM – Direct Secure Message

PAA(Participant Account Administrator): You must attest to facility user activity for the Q4-2023 quarter. Login with your PAA account and review user activity on your PAA home page. When ready, click the "Attest to Audit" button to complete the audit.

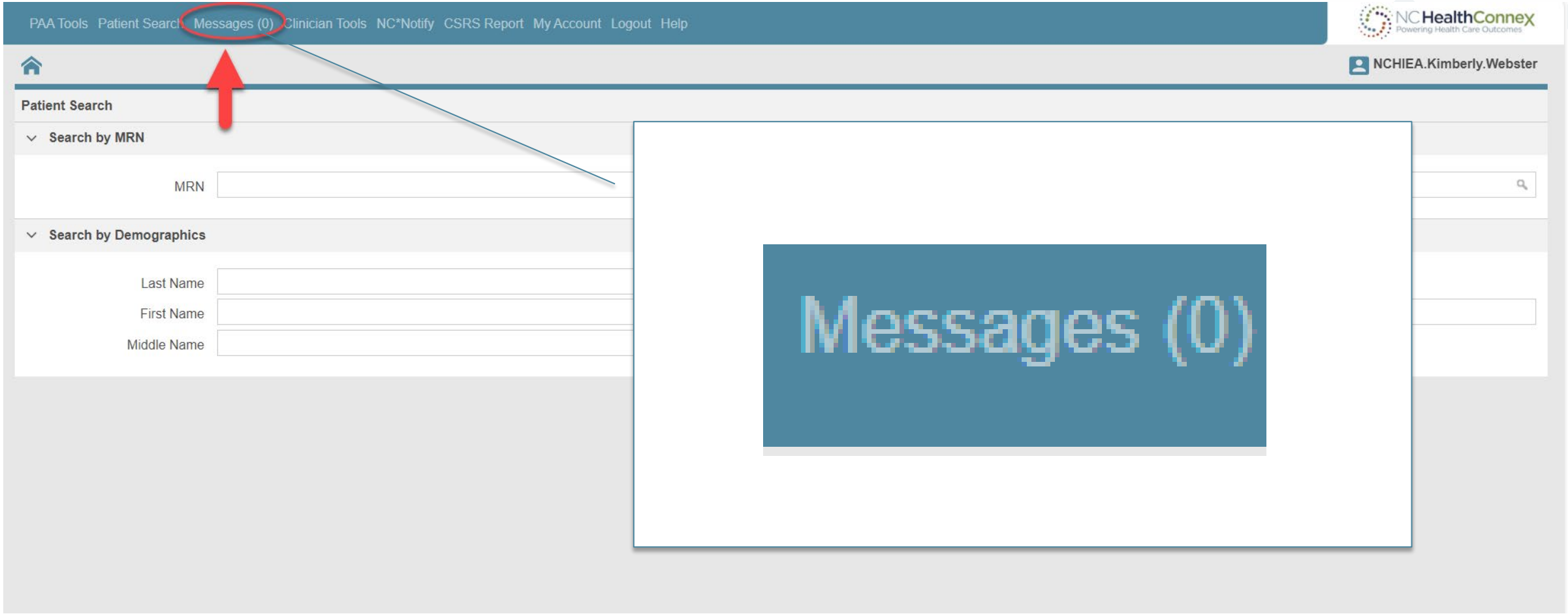
Printing functionality has changed with recent upgrades to the clinical portal. Please see page 45 in the User Guide for more details!

Internet Explorer is not a supported browser and users may experience issues when using it. Recommended browsers include Chrome, Firefox, Edge, Opera, and Safari.

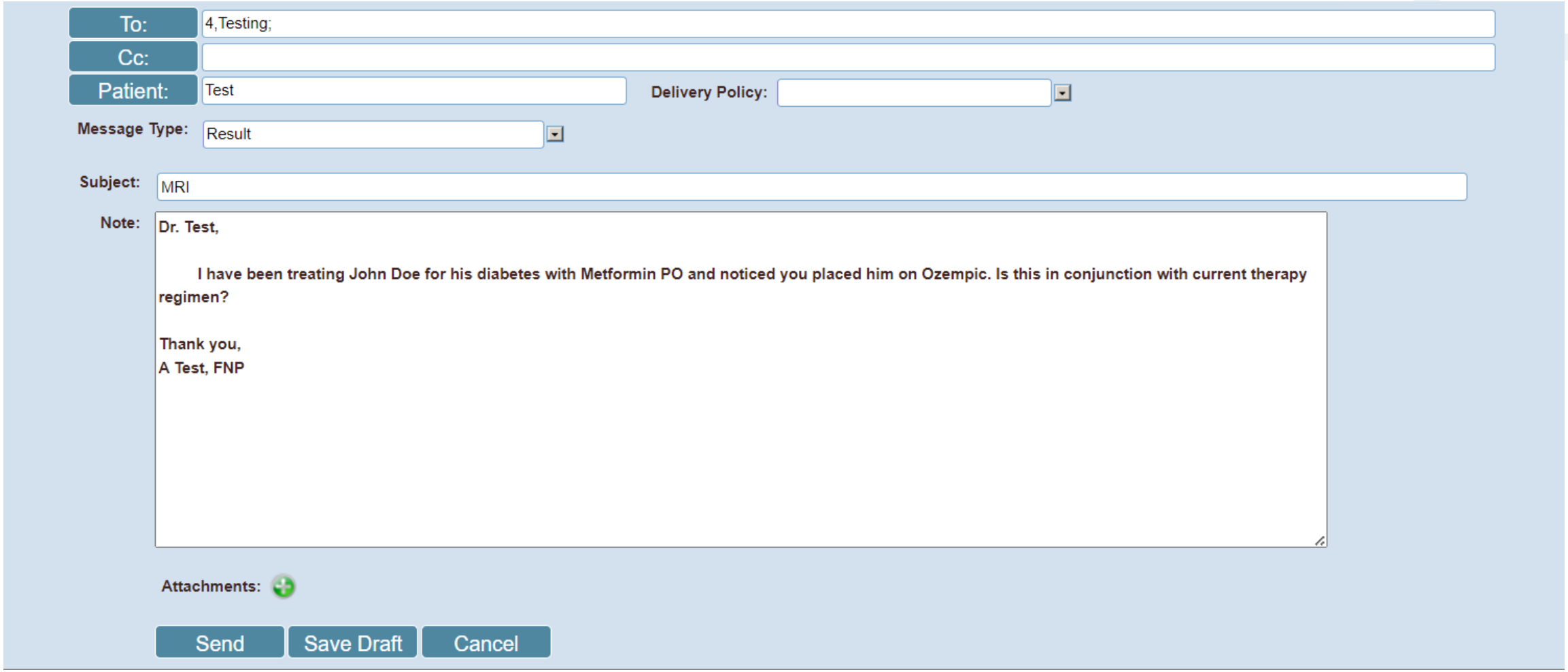
Additional unparsed clinical documents (C/CDA) may be available and are noted by a "No" in the "Document Parsed" column on the Summary and Documents tab.

DSM lives in the NC HealthConnex Provider Clinical Portal.

DSM – Click on Messages to go to your DSM inbox.



DSM – Direct Secure Message Example



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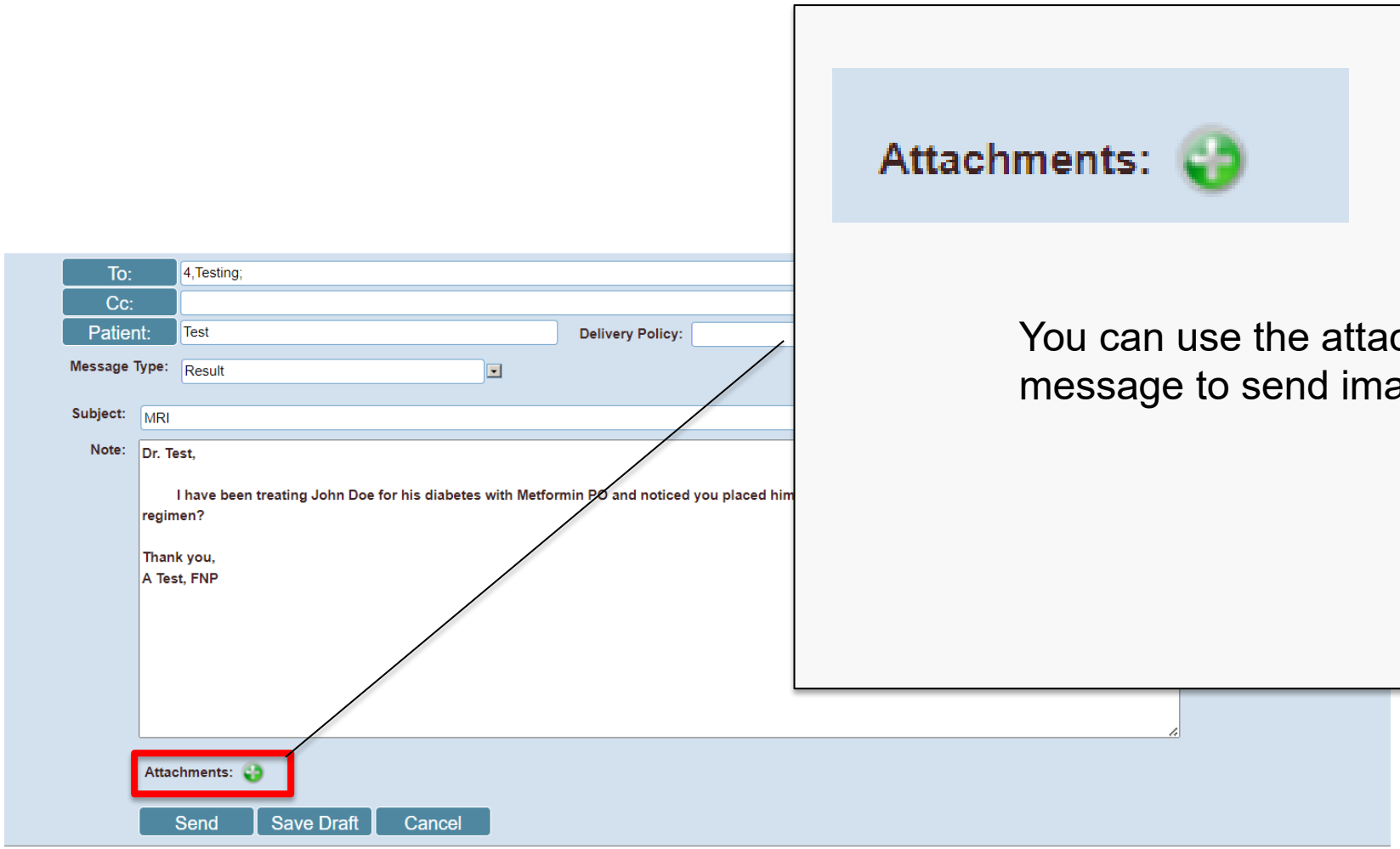
DSM – Direct Secure Message Example



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Pre-Submitted Questions

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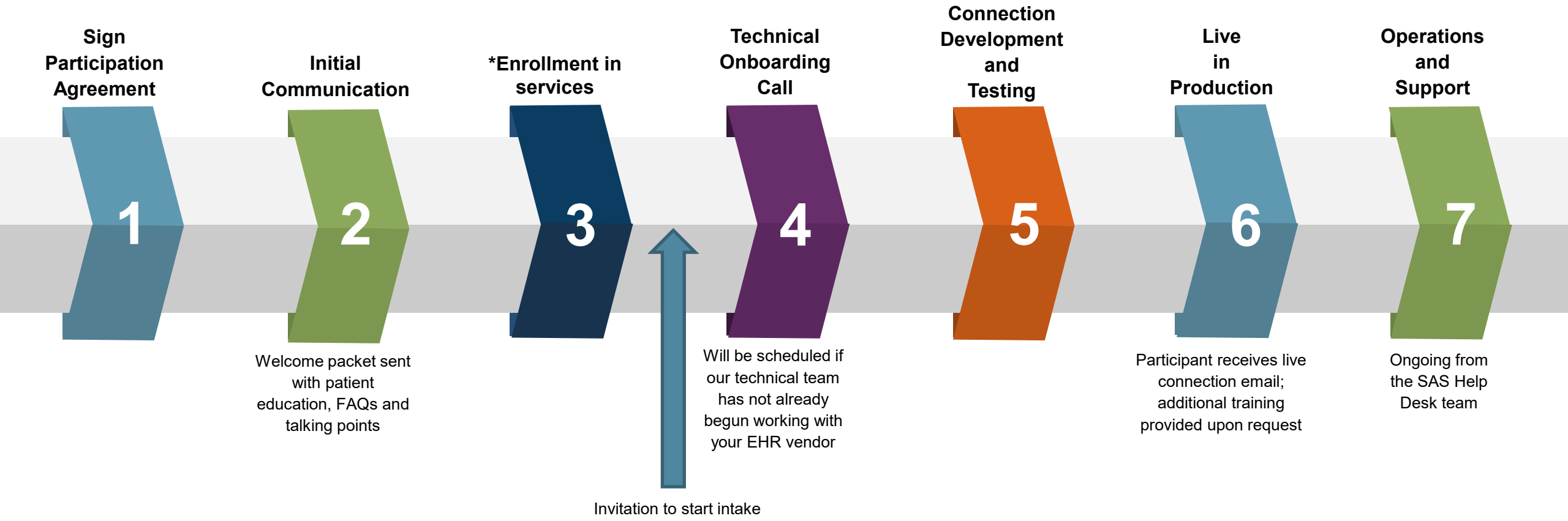
The Queue

Where are we in queue?

Even if you are not live and submitting data to NC HealthConnex, with a full participation agreement, you can begin utilizing NC HealthConnex services.* When it is your organization's turn in the queue, we will reach out via email and ask you to complete the connection scoping checklist. If you have signed a participation agreement, you are complying with the mandate.



Data Access

Will care managers be allowed to view member demographic information to include addresses, telephone numbers and legal guardian information?

The data that care managers have access to is determined by their organization's Participant Account Administrator (PAA). To see demographic data, they would need clinician access.

EHR

My EHR vendor does not know what to do to publish our providers direct mail addresses to the NCHIE [NC HealthConnex].

Please reach out to the SAS Help Desk at HIESupport@sas.com.

NC*Notify

What provisions, if any, does NC Health Connex afford for LME/MCOs in the public health system access patient records for paying providers?

Right now, Health Plans/LMEs/MCOs do not have the ability to query the Clinical Portal. Payors/Health Plans have different access. They can enroll in NC*Notify to get near real-time event notifications (ADT messages).

What can be shared back with us via ADT feed?

NC*Notify is our event notification service showing Admission, Discharge and Transfer (ADT) data. It allows providers to see when their patients receive care outside of their organization. For the specifications or type of notifications you will receive, you can see our NC*Notify specifications and release notes.

NC HealthConnex in General

How does this system work?

A provider/organization would need a full participation agreement to utilize our services. In general, the providers/organizations send their clinical and demographic to NC HealthConnex via their EMRs. That data is then visible for providers that have a HIPAA-approved purpose for accessing the data. We have videos and training modules available on our website.

1) What will the SHP transition from BCBS to Aetna look like? 2) Who can I contact for tech issues between the HIE [NC HealthConnex] and my EHR?

You can check the NC SHP website or call 855-859-0966 for more information. For any technical issues, you can contact the Help Desk at HIESupport@sas.com or 919-531-2700.

The Portal

Pre-Submitted Questions

Is prescription information available? What about labs and diagnostic tests such as imaging?

Yes! All this information is available in the Clinical Portal. The next slide covers where to find prescription information. You will not see the image but will see the imaging report. However, you can request the image be sent as an attachment in DSM.

Why are there CCDs for some encounters generated but not others? I rarely see CCDs from certain facilities.

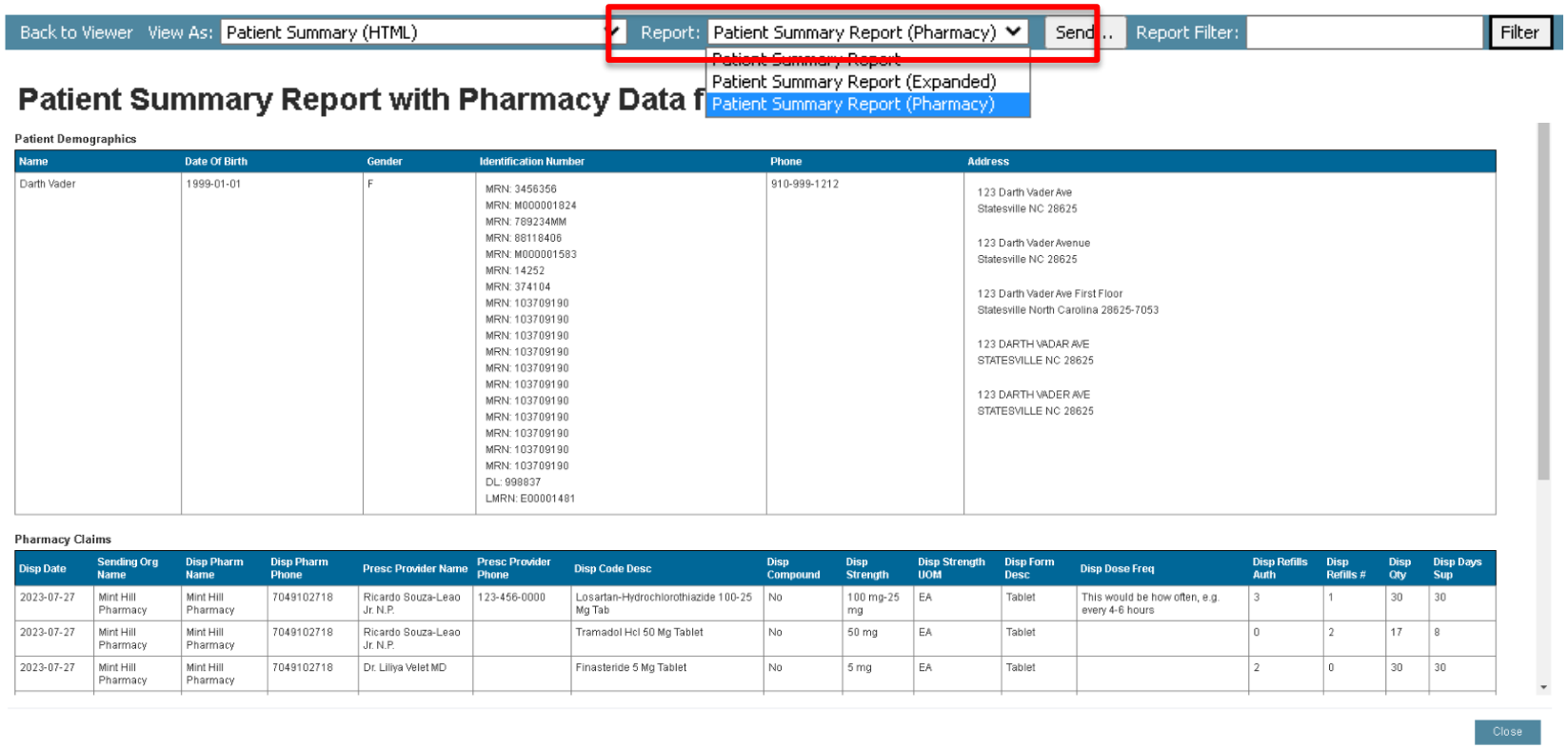
The documents listed in the portal are dependent on a few factors: the payor (the mandate is for state-funded data), the sending facility's agreement and how often they send CCDs (minimum is once per 24 hours). We display the data that is sent to us.

[We] need help regarding inpatient discharge information for transitional care management (TCM) services.

We can help you with that. You can search for patient information in the Clinical Portal and view CCDs (the hospital summaries), but you can also get notifications using NC*Notify to let you know that your patient has been admitted so you can begin the timely follow-up needed to meet TCM requirements.

Pharmacy

Pre-Submitted Questions



Can we get an update on pharmacy implementation?

Some of our pilot pharmacies are already live and submitting data, so you may see pharmacy data inside the clinical portal. Please see the updated Clinical Portal User Guide for more information.

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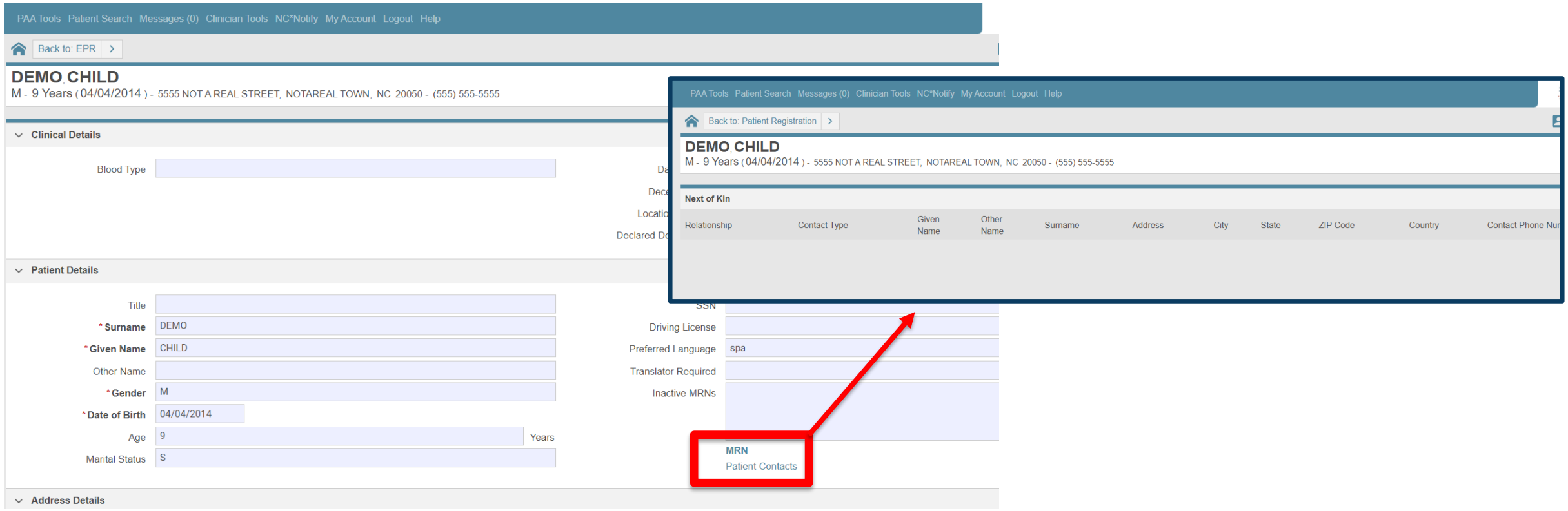
The Portal

Pre-Submitted Questions

Is there a way to find next of kin on your website?

Yes, we have next of kin/emergency contact information inside the clinical portal.



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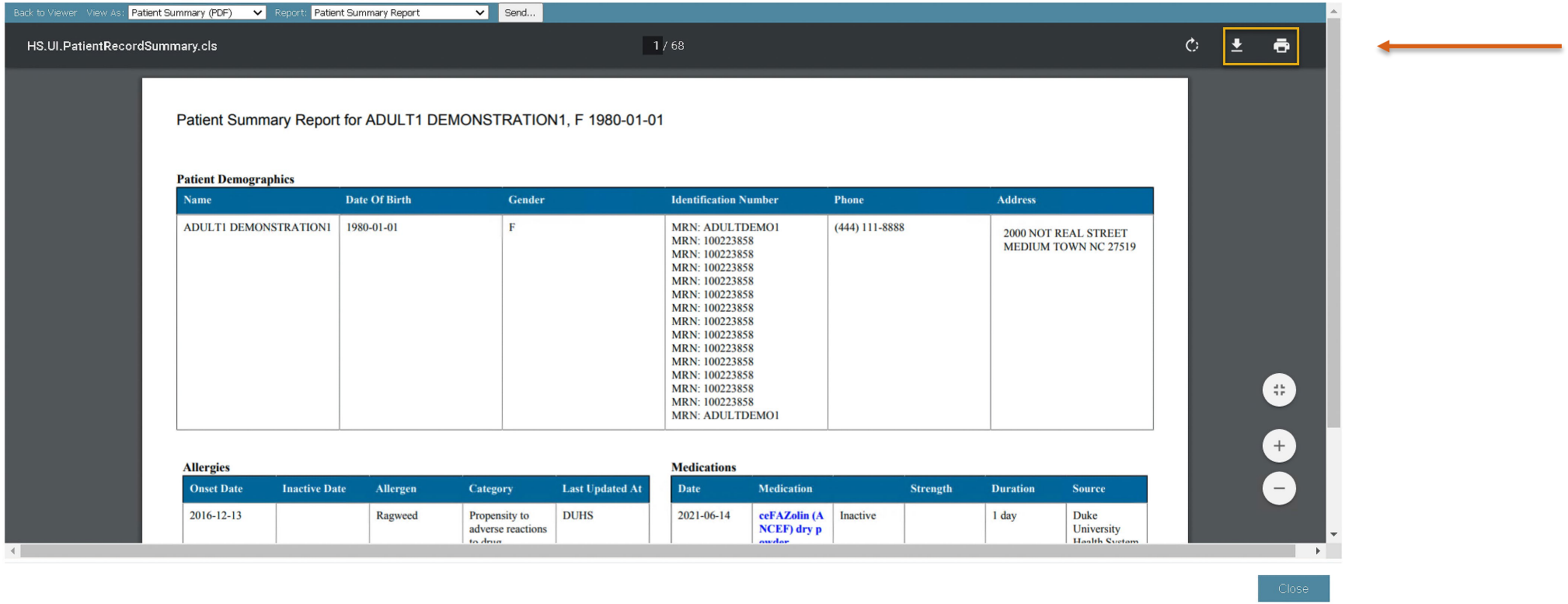
Printing from the Portal

Is there a way to download or print documents from NC HealthConnex – specifically copies of evaluations or comprehensive reports?

You can print documents from NC HealthConnex. Please see page 42-45 of the Clinical Portal User Guide. Use the "print" and "download" icons at the top right of the screen to take each action, as shown below.



Reminder: Please use the Q&A feature at the bottom of WebEx to ask your question.

Chat Questions

Pre-Submitted Questions

Does NC HealthConnex collect unidentifiable data?

You can see the data elements we collect in our technical specifications document.

When will pharmacies be added to this – is there any point in setting up for DSM Secure Messaging since we are not active yet?

Some of our pilot pharmacies are already live and submitting data, so you may already see pharmacy data inside the Clinical Portal from those participating pharmacies.

Yes, you can set up a DSM account even if your EHR has not been connected to NC HealthConnex. If you don't have DSM through your EHR vendor and you have a Full Participation Agreement with the NC HIEA, you can create an account through NC HealthConnex. All our value-added services are available once you have a signed and executed agreement, even if you are not yet live, connected and submitting data.

Will LME/MCOs, health plans, be able to query at some point in the future?

There are no plans for that to change, but it doesn't mean that it will not. The use is limited to HIPAA-approved purposes.

Chat Questions

Does the information shared on TCM also apply to the LME/MCOs that are also performing TCM functions?

That question might be best suited to our use case work group. Please email kimberly.f.webster@nc.gov so we can coordinate with them to get you an answer.

Who can I contact for TCM specific questions? We are seeing same-day procedures and less than 24-hour admissions.

You can email Kim Webster, one of our business development and outreach specialists directly at kimberly.f.webster@nc.gov.

It was mentioned transition of care management services regarding discharge information could be provided via the portal. My question, are there specific reports you can run on your patient panel for readmits?

You can filter your event notifications in NC*Notify.

Thank You!

For more information visit,

www.nchealthconnex.gov

Tel: 919-754-6912

E-mail: hiea@nc.gov

For technical support,

Tel: 919-531-2700

E-mail: HIESupport@sas.com

DO NOT SEND PHI to the NC HIEA or to the Help Desk!