CLERK USER GUIDE

ALABAMA ONE HEALTH RECORD

Unify™ Data Management Platform 2012/2013
Software Build 5.15

April 2015

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TRUVEN HEALTH ANALYTICS

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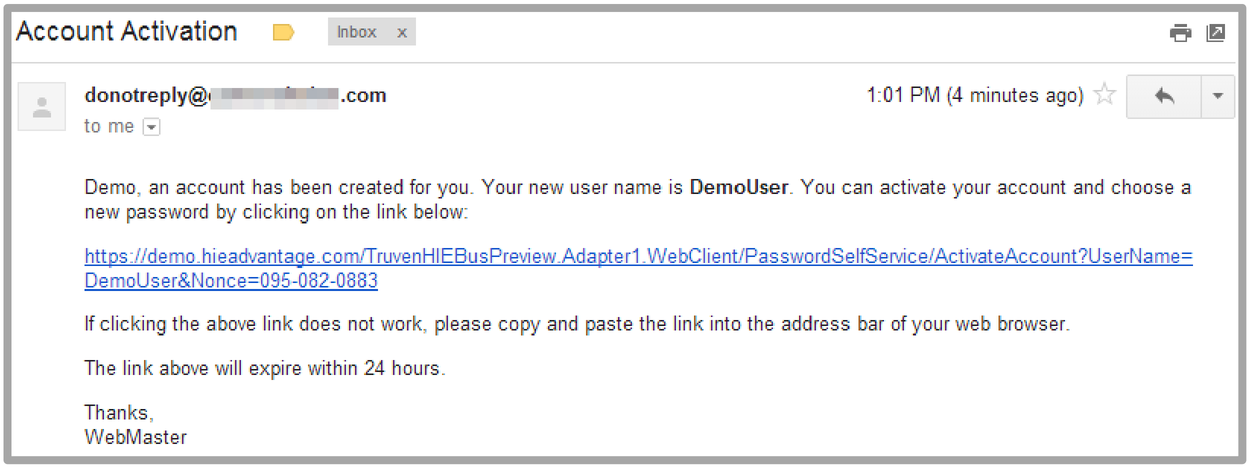
INTRODUCTION

The purpose of this document is to provide a guide for those HIE Users who are responsible for managing patient consent preferences and registration. The term “Clerk” is meant to represent a healthcare organization’s function of registering patients and updating patient consent status. Should any patient exercise his or her right to be excluded from the electronic exchange of their clinical information, a user with Clerk privileges can refer to the information in this guide for directions on how to record that decision.

ACCOUNT ACTIVATION

New users will receive an email similar to the one below with a link to set up security questions and choose a password. Click on the link to begin account activation.


Account Activation Inbox x

donotreply@[redacted].com
to me

1:01 PM (4 minutes ago)

Demo, an account has been created for you. Your new user name is **DemoUser**. You can activate your account and choose a new password by clicking on the link below:

https://demo.hieadvantage.com/TruvenHIEBusPreview.Adapter1.WebClient/PasswordSelfService/ActivateAccount?UserName=DemoUser&Nonce=095-082-0883

If clicking the above link does not work, please copy and paste the link into the address bar of your web browser.

The link above will expire within 24 hours.

Thanks,
WebMaster

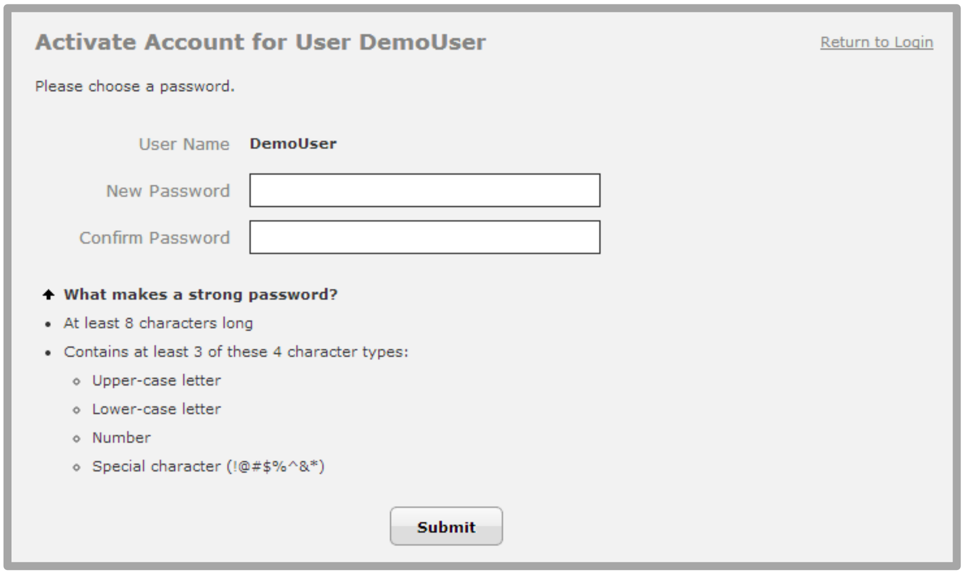
Note: The Clinical Web portal supports the latest versions of the following browsers:

- Google Chrome
- Internet Explorer
- Mozilla Firefox
- Safari

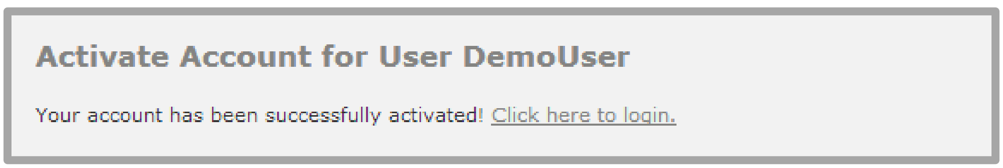
Once you click on the link to begin account activation, you will be directed to the following screen in your default Web browser.

Create a new password. To view the minimum requirements for your system, click the arrow beside **What makes a strong password?**. Enter your password and confirm, then click **Submit**.

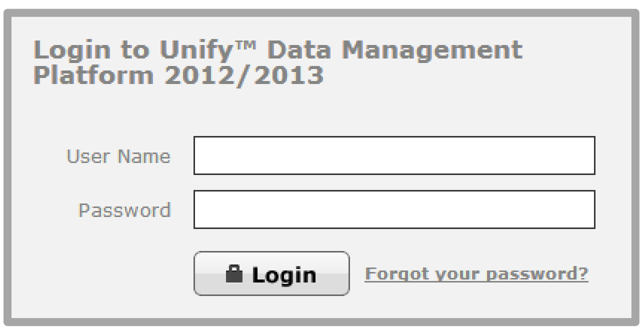
Note: Passwords are case-sensitive.



After your new password is accepted, you will see a confirmation screen. Make note of your user name before proceeding (the user name is "DemoUser" in the example below). Select **Click here to login**.



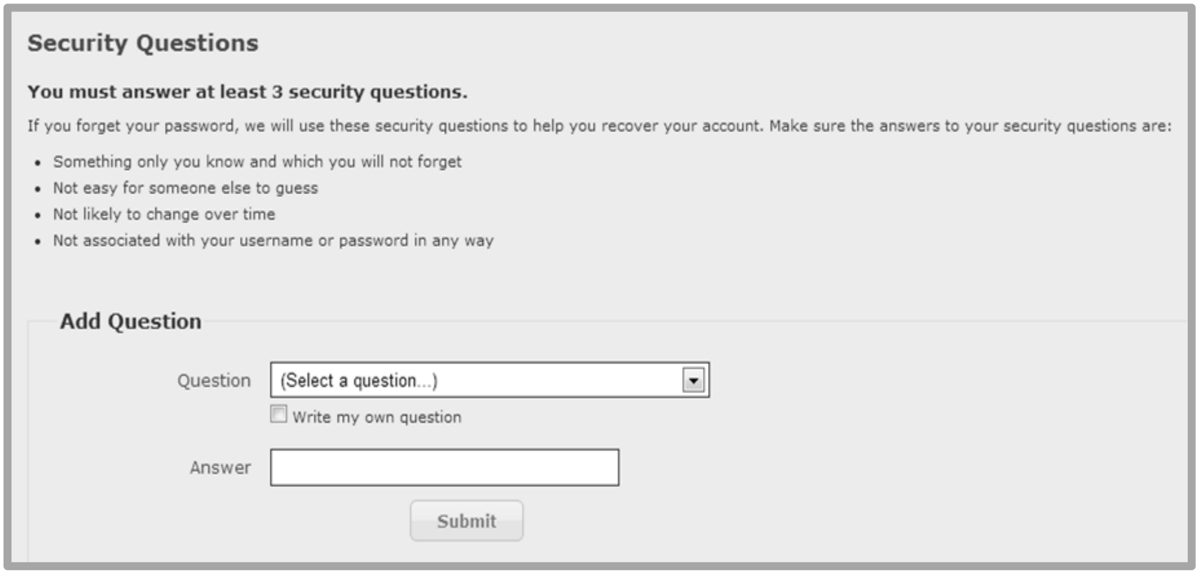
You will be taken to the login screen. Enter your username and password and click the **Login** button.



If you attempt login using the incorrect password too many times, your account will become locked out. Locked accounts will become unlocked after a certain amount of time. If you are having difficulties logging into your account, click the **Forgot your password?** link, or contact your system administrator.

Follow the directions to add at least three security questions. You may edit these later, after completion of the account activation steps, by clicking **My Profile** in the top right-hand corner of the screen.

Note: Prior to arriving on the *Security Questions* page, you may need to read and accept some terms and conditions, if they have been set by your HIE.



After adding your third security question, your account will be active and you will be redirected to the Application Dashboard “home” screen.

Note: Users with the Clerk role will be redirected to the *Census* screen.

NAVIGATING IN THE WEB CLIENT

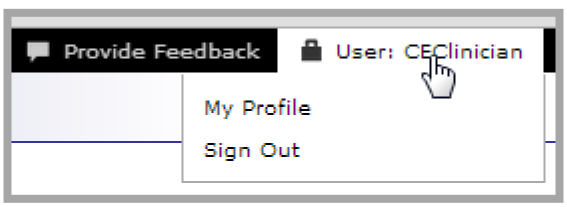
The HIE platform's navigation bar allows for quick streamlined navigation through the various screens available within the Web client.

The menu links across the left-hand side correspond to the applications that are available to the user and reflect the permissions associated with the user's account. Depending on what those permissions are, different applications from those included in the screenshots below may appear on the navigation bar.

The Dashboard button and the corresponding "home" icon at the far left of the navigation bar provides access to the home page from anywhere in the Web client. For users with the Clerk role, this home page is the *Census* screen.

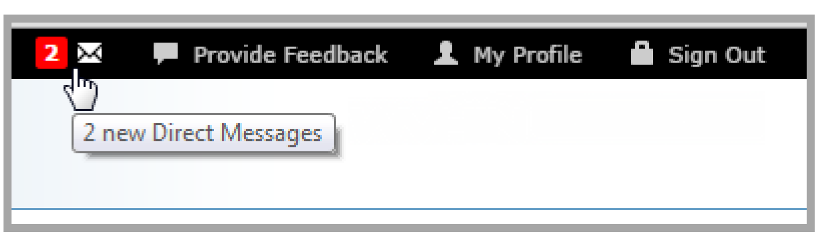
After a user has accessed additional applications, a link to the most recently accessed application will appear next to the **Dashboard** button. This **Back** button is indicated by a back arrow with the name of that screen.

Across the right-hand side of the navigation bar are additional menu links. By hovering over the user name, the *My Profile* and *Sign Out* links become visible. Refer to the **Feedback** and **My Profile** sections below for additional information.

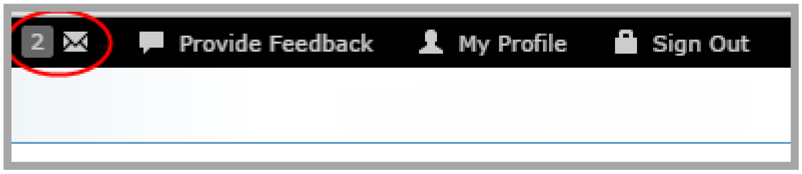


These links may also be configured to provide access to the My Profile and Sign Out buttons via individual buttons.

For users that have access to the Direct secure messaging application, a message notification may appear on the navigation bar. This notification displays the number of unread messages in a user's Inbox. When new messages are received, the indicator displays in red.



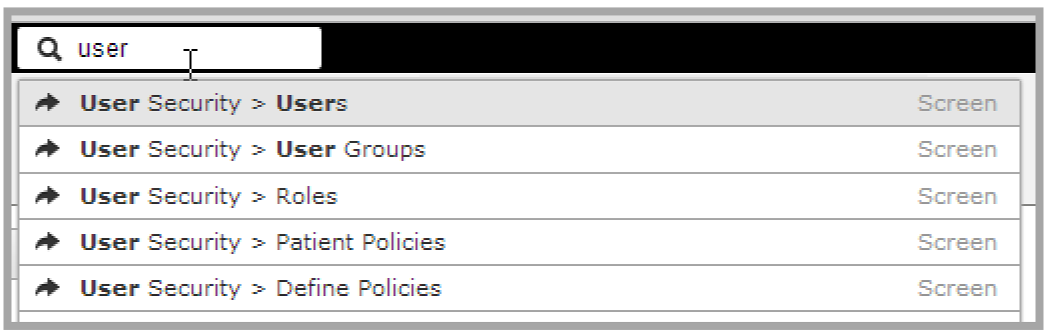
Clicking on the indicator will provide access to the Inbox screen. After the user has visited the Inbox, the indicator display will change from red gray.



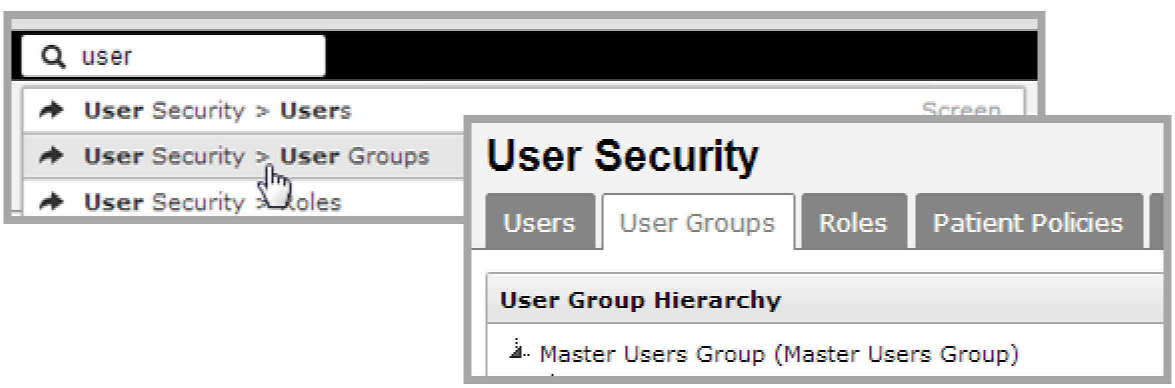
Searching for Screens

The Global Search Bar is located at the end of the menu links on the left-hand side of the navigation bar. It is useful for searching and navigating directly to any application screen within the HIE platform. The search terms are not case sensitive, and the search results will appear in a pop-up window directly below the search box.

The search results will include all screens for which the search term is included as all or part of either the application name (e.g., User Security) or the tab names (e.g., Users).

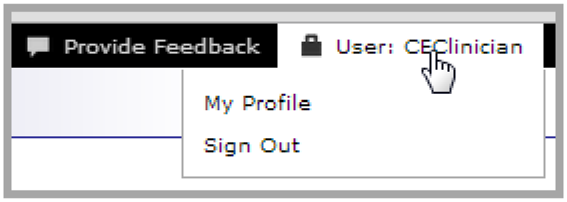


Clicking on a row from the list of results will provide access to that screen.



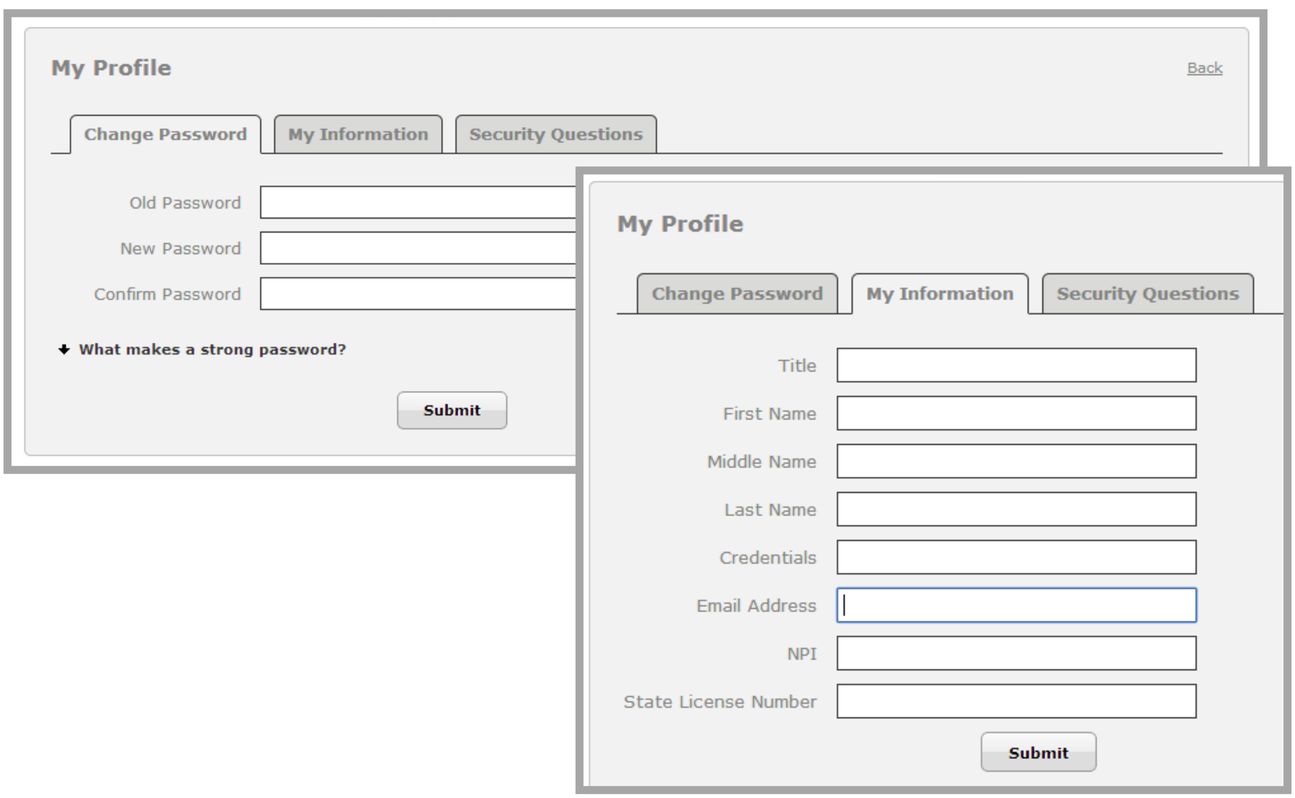
MY PROFILE

To change your password and update your security questions and answers, access your profile by hovering over your user name in the upper right-hand corner of the screen and selecting the **My Profile** link.

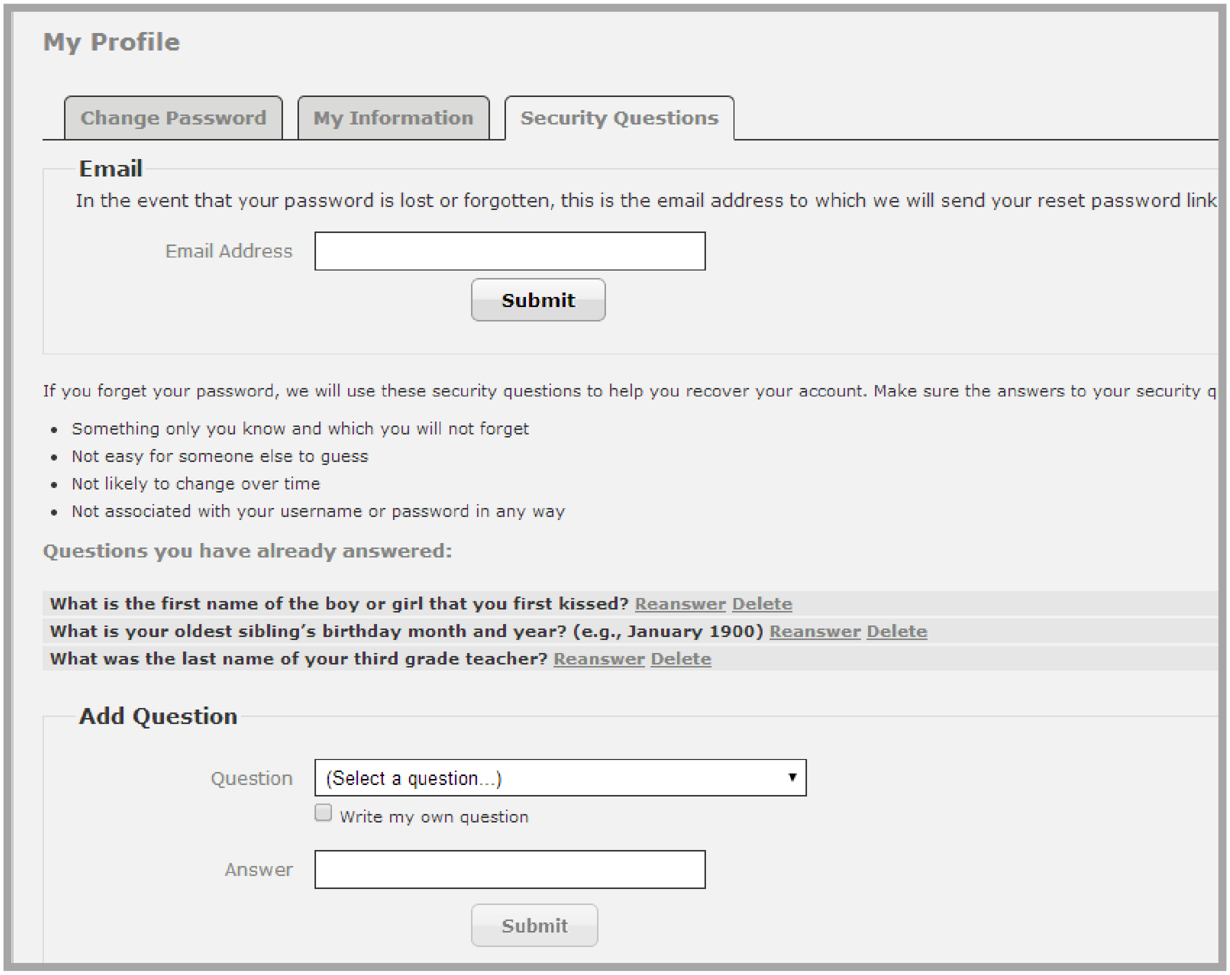


Note: The **My Profile** button may be available via a separate button on the navigation bar, instead of via a dropdown menu under the user name.

Here, you can update your password on the **Change Password** tab, view and update **My Information**, or update your **Security Questions**.



On the **Security Questions** tab, you can update the email address to which password reset links will be sent, and you can view and update your selected security questions.



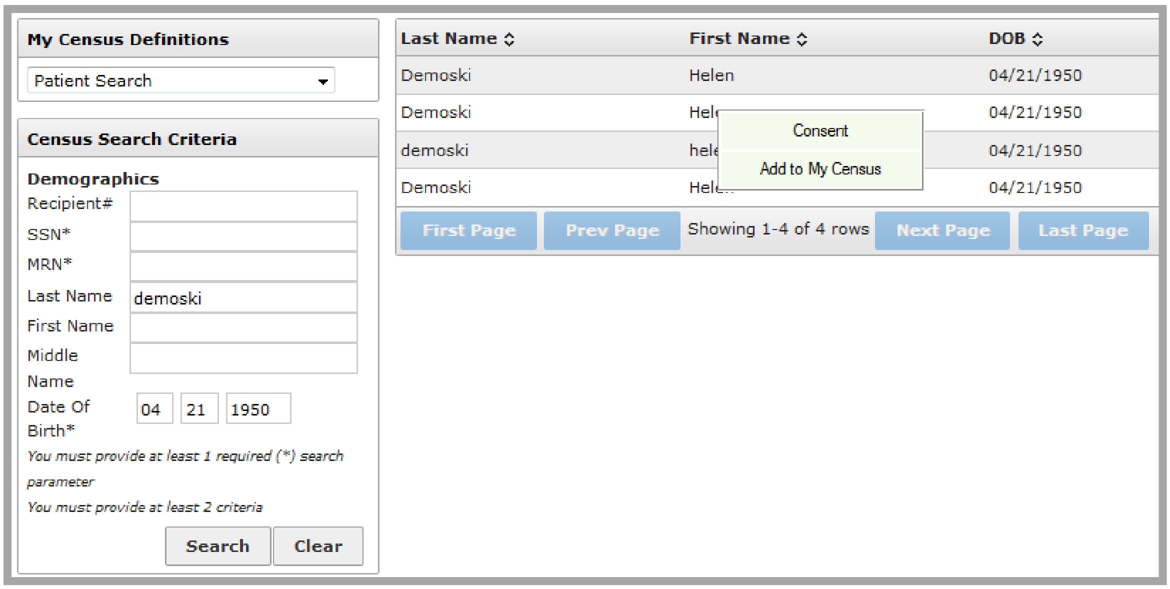
Click the *Back* link on the right-hand side of the screen to return to the patient information tabs.

SEARCHING FOR PATIENTS

Census

After logging in, you will be presented with the *Census* screen, from which you can search for a patient using the listed criteria. Any fields that are required to complete a search will be marked on this screen appropriately. If the search does not produce any results, the patient may need to be registered (see the **Registration of Patients** section for more information).

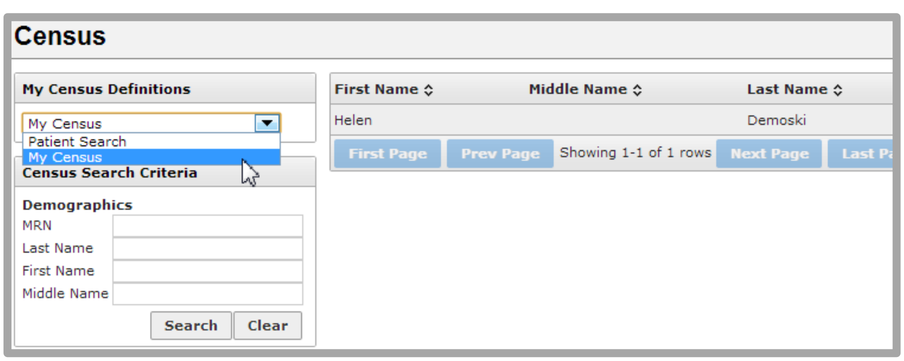
Note: The options in the drop-down "Patient Search" menu may differ from the screenshot below, based on selections made by your HIE.



Patients matching the search criteria will appear in a list to the right of the search box. Results can be sorted by **Last Name**, **First Name**, or **DOB** (date of birth).

Click anywhere on the row with the patient's name to access the patient's record, or right-click and choose from the menu. Clicking a tab option will take you directly to the tab for that patient.

Patients previously viewed and saved are accessible by selecting **My Census** from the *My Census Definitions* dropdown box. To add a patient to the **My Census** menu, right-click on them in the manual search results, and choose **Add to My Census**.

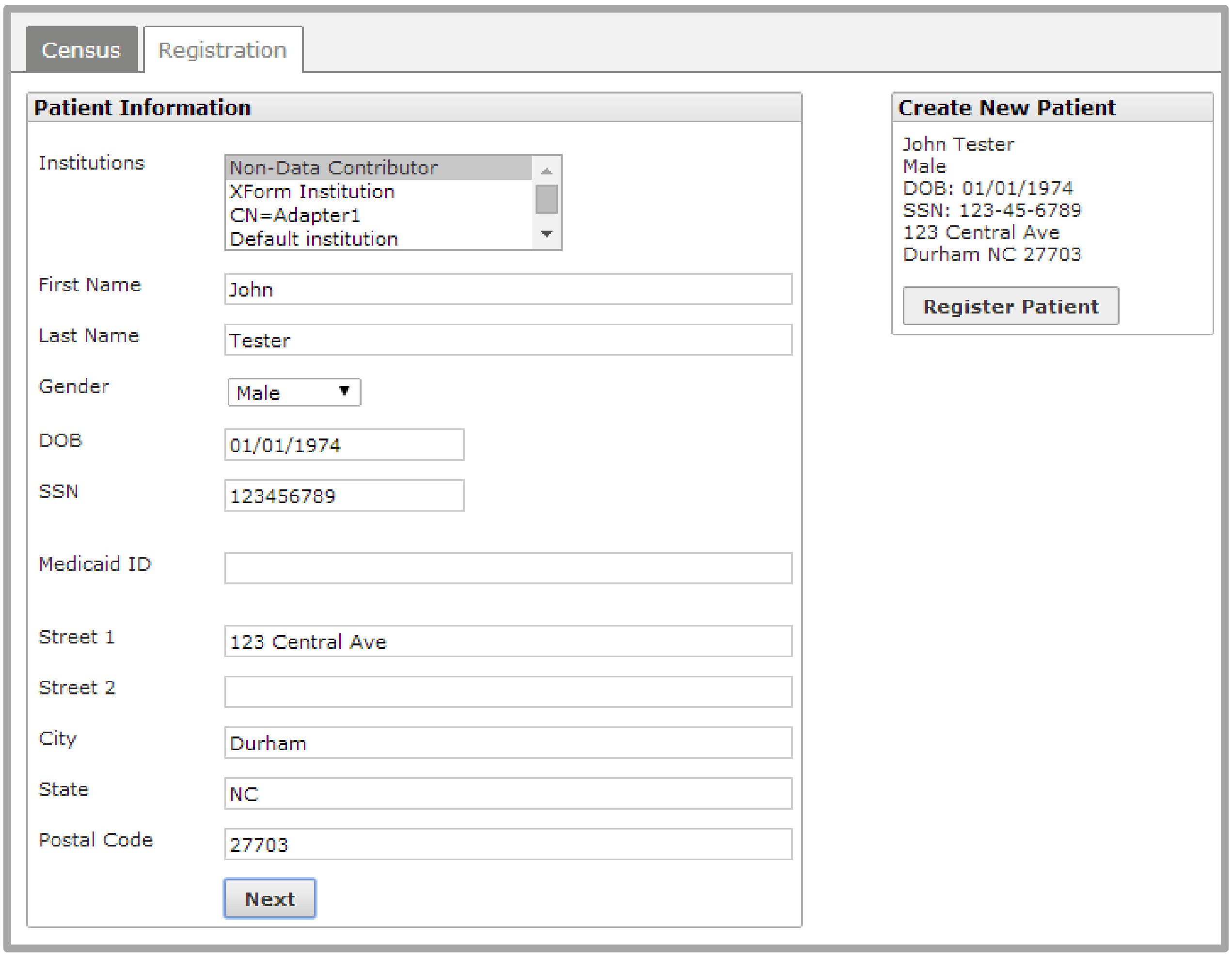


REGISTRATION OF PATIENTS

In the event that a patient is not already in the Master Patient Index from another participating provider, they must first be registered with the HIE before managing patient consent.

To register a patient, navigate to the Census screen and choose the **Registration** tab. Next, select **Non Data Contributor** as the institution. Then, enter as much information as you have for the patient. First Name, Last Name, and DOB are the minimum requirements to register a patient.

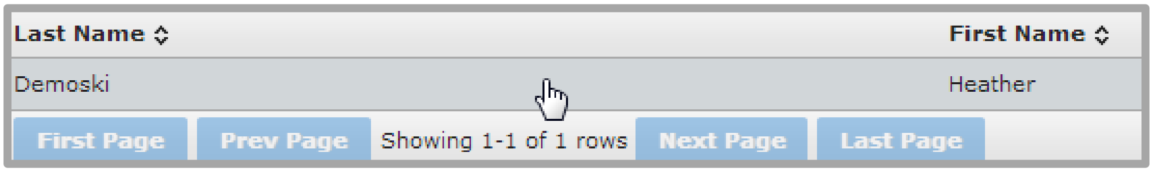
Click **Next** to review the new patient information which will appear to the right of the *Patient Information* section. Then, click **Register Patient** to complete registration of the patient.



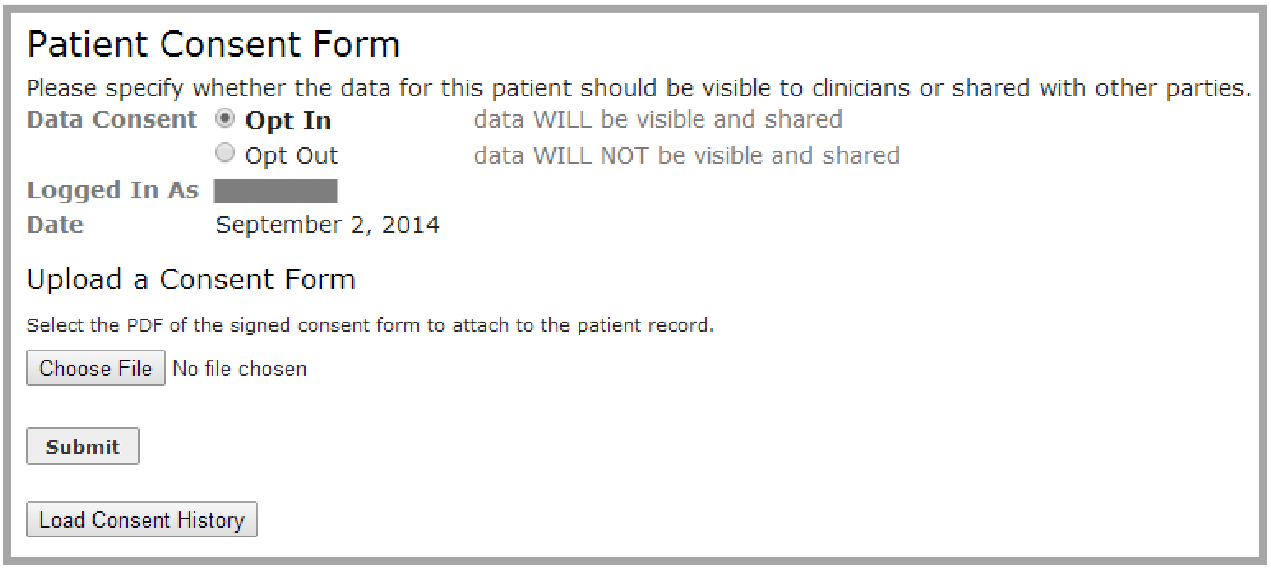
The Web client will then automatically navigate to the **Consent** tab of the patient screen.

MANAGING PATIENT CONSENT FORM – "OPT-OUT"

After performing the search, click anywhere on the row with the patient's name to begin.



You will be directed to the **Consent** tab, where you will see the patient's data sharing status set to either **Opt In** or **Opt Out**.



Note: The default setting for *Data Consent* on the Patient Consent Form is set to **Opt In**. This is the default for an HIE that follows an opt-out consent model. All information not specially protected by federal or state laws is shareable under HIPAA TPO provisions and will be shared unless a patient explicitly elects to opt out of the system.

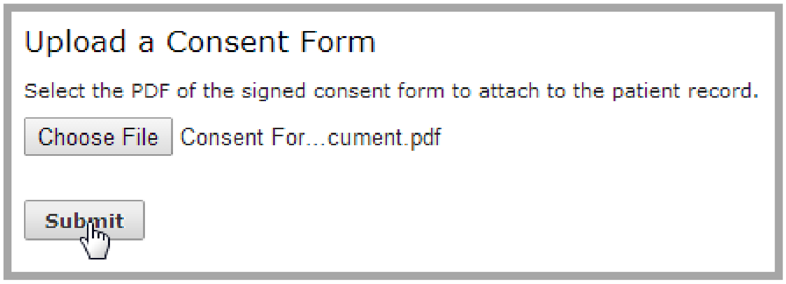
Changing Consent Status

To change a patient's data sharing status to "opt out", select **Opt Out** and click the **Submit** button to save the selection. A patient that initially elects to opt out of the HIE may later change his or her mind. To change the sharing status to "opt in", select **Opt In** and click the **Submit** button.

Note: A consent form may or may not be required by your HIE in order to change a patient's consent status. For more information, contact your administrator.

Uploading a Consent Form

A change in a patient's consent status is often accompanied by a signed patient consent form. To upload a PDF of the signed form, click the **Choose File** button and select the appropriate consent document from the file selection window. The file name of the selected document will appear to the right of the **Choose File** button.

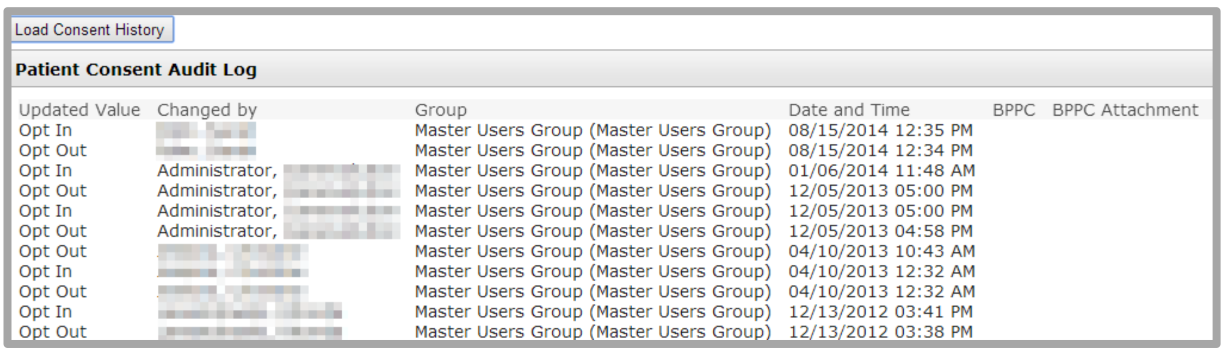


Click the **Submit** button to accept the document. This consent form will then be available in the Attachment column of the *Patient Consent Audit Log* (see below).

Viewing Consent History

Clicking the **Load Consent History** button displays the *Patient Consent Audit Log*, an audit trail of all changes made to a patient's consent form.

Note: The *Patient Consent Audit Log* is only available after at least one change in patient consent status has been submitted and recorded.



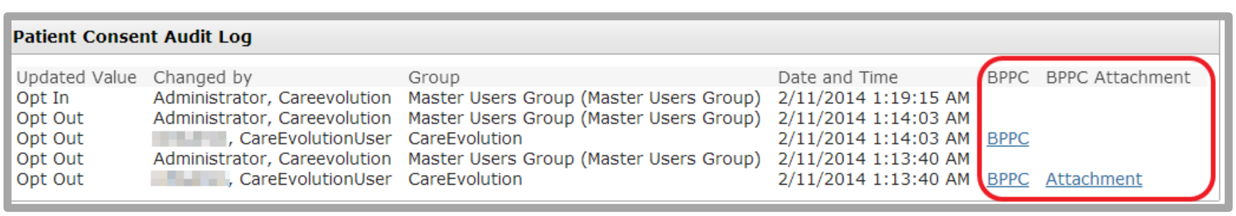
Load Consent History

Patient Consent Audit Log

Updated Value	Changed by	Group	Date and Time	BPPC	BPPC Attachment
Opt In	[illegible]	Master Users Group (Master Users Group)	08/15/2014 12:35 PM		
Opt Out	[illegible]	Master Users Group (Master Users Group)	08/15/2014 12:34 PM		
Opt In	Administrator, [illegible]	Master Users Group (Master Users Group)	01/06/2014 11:48 AM		
Opt Out	Administrator, [illegible]	Master Users Group (Master Users Group)	12/05/2013 05:00 PM		
Opt In	Administrator, [illegible]	Master Users Group (Master Users Group)	12/05/2013 05:00 PM		
Opt Out	Administrator, [illegible]	Master Users Group (Master Users Group)	12/05/2013 04:58 PM		
Opt Out	[illegible]	Master Users Group (Master Users Group)	04/10/2013 10:43 AM		
Opt In	[illegible]	Master Users Group (Master Users Group)	04/10/2013 12:32 AM		
Opt Out	[illegible]	Master Users Group (Master Users Group)	04/10/2013 12:32 AM		
Opt In	[illegible]	Master Users Group (Master Users Group)	12/13/2012 03:41 PM		
Opt Out	[illegible]	Master Users Group (Master Users Group)	12/13/2012 03:38 PM		

The *Patient Consent Audit Log* lists all changes made to opt-in/opt-out status, the name and user group of the user who made the change, and the date and time of the change. Two line items are listed in the *Patient Consent Audit Log* for each change in consent status.

In addition, links to the Basic Patient Privacy Consents (BPPC) XML document and attachment are available (if applicable). Clicking on any **BPPC** link in the consent history will download a raw XML file. Clicking on the **Attachment** link will begin the download of any attachments included with the consent change (e.g., a PDF of a signed consent form).



Patient Consent Audit Log

Updated Value	Changed by	Group	Date and Time	BPPC	BPPC Attachment
Opt In	Administrator, Careevolution	Master Users Group (Master Users Group)	2/11/2014 1:19:15 AM		
Opt Out	Administrator, Careevolution	Master Users Group (Master Users Group)	2/11/2014 1:14:03 AM		
Opt Out	[illegible], CareEvolutionUser	CareEvolution	2/11/2014 1:14:03 AM	BPPC	
Opt Out	Administrator, Careevolution	Master Users Group (Master Users Group)	2/11/2014 1:13:40 AM		
Opt Out	[illegible], CareEvolutionUser	CareEvolution	2/11/2014 1:13:40 AM	BPPC	Attachment

PROVIDE FEEDBACK

The **Provide Feedback** link in the upper right-hand corner of every screen is used to submit questions, suggestions, or problems. A support team regularly reviews all feedback and responds appropriately.

Each message will automatically include information about the page and patient currently being viewed. Therefore, the user should not include patient demographics or other identifying information.