NON-CLINICAL VIEWER USER GUIDE

One Health Record®

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INTRODUCTION

This document will provide One Health Record® users with an introduction to how to use InterSystems' HealthShare Clinical Viewer. HealthShare was chosen by One Health Record® to serve as the platform for Alabama's Health Information Exchange (AHIE). HealthShare is a family of products that enable your organization to:

1. Capture health and health-related information from everyone involved
2. Share that information in a meaningful way among everyone in the care process
3. Analyze and understand all of the information, structured and unstructured
4. Act on that understanding to drive improvements in care and efficiency

Clinical Viewer is the web-based tool which enables users to access information stored in the One Health Record® health information exchange. It is the eyes of the clinician and the outside world into viewing and analyzing individual patient searches and medical records. It provides a "read-only" view of patient information, which means that users can view data but are not able to modify it.

Clinical Viewer employs a very robust security model which is configured for the needs of One Health Record®, and it recognizes that different types of users have different privileges, so one group of users may be able to see more or different information than another user. The patients' consent elections are combined with the user privileges to determine exactly what information any user is entitled to see.

This guide is aimed at staff who are asked to perform non-clinical tasks in One Health Record®.

LOGGING IN

One Health Record® requires that you sign in to access the Provider Portal, the Health Information Exchange core functionality, and Direct Secure Messaging. Users who have received One Health Record® accounts should navigate to https://provider.alabamaonehealthrecord.com. From this URL you can launch any of these functions, navigate to key links that will be frequently updated, and receive announcements from the One Health Record® Team. If you already have an active session with One Health Record®, you will go directly to the landing portal. If your session has timed out, you may periodically be required to log back in providing your username (FILastname@alohr) and password provided to you previously. If you have any issues with login, please contact the helpdesk via email at onehealthrecord@medicaid.alabama.gov or call 844-746-3540.

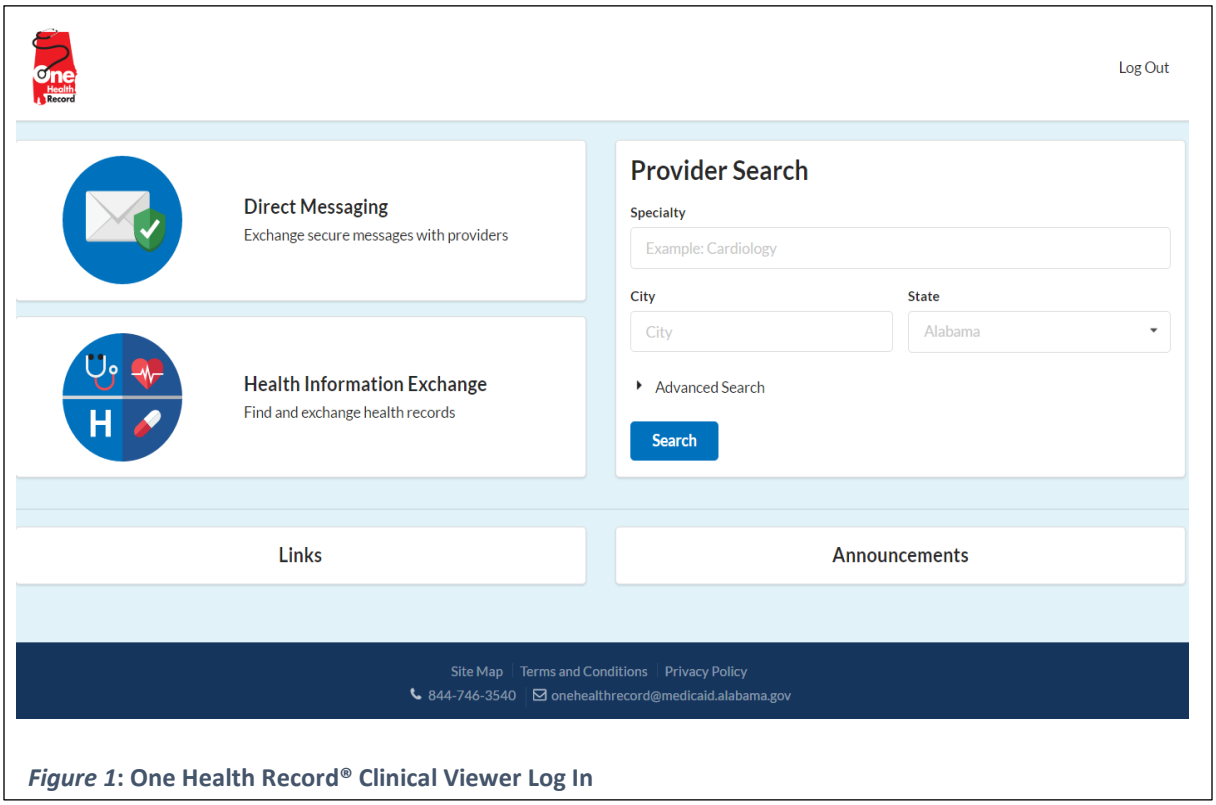

***Figure 1*: One Health Record® Clinical Viewer Log In**

PATIENT SEARCH

After clicking on the Health Information Exchange button on the launch page, this screen will appear. Select Patient Search from the Clinical Viewer menu to begin a patient search:

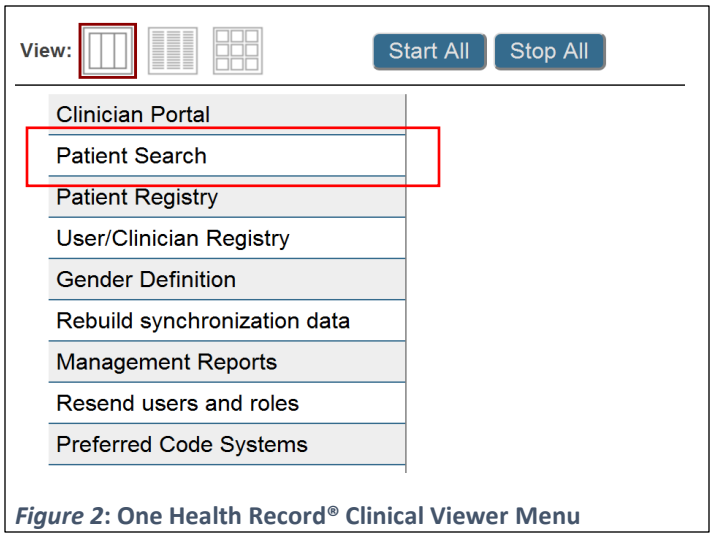

***Figure 2*: One Health Record® Clinical Viewer Menu**

This will bring you to the "Patient Search" screen. Enter as much criteria as you can and click on the Search button.

If you provide a Medical Record Number (MRN), you must also choose the associated facility from the "Assigned By" dropdown list.

Date of birth, if provided, must be entered in the format yyyy-mm-dd (for example, August 1, 2016 would be entered as 2016-08-01).

The "Identifier Type" section gives you the ability to search by Corporate ID, Driver's License or Insurance ID. If you select one of the items from this dropdown, the ID Number box below it becomes available so you can enter the appropriate identifier.

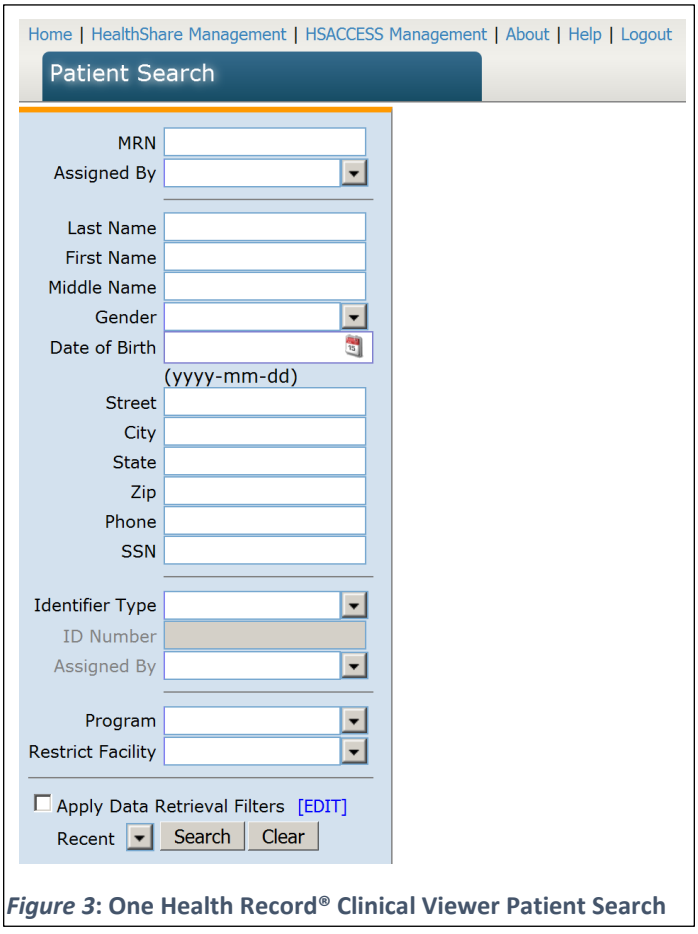

***Figure 3*: One Health Record® Clinical Viewer Patient Search**

Below is a sample of the result list that displays likely matches for your search. Note the "Rank" column to the far right – it indicates how close this patient matches the criteria you specified. The most likely matches will appear at the top of the list.

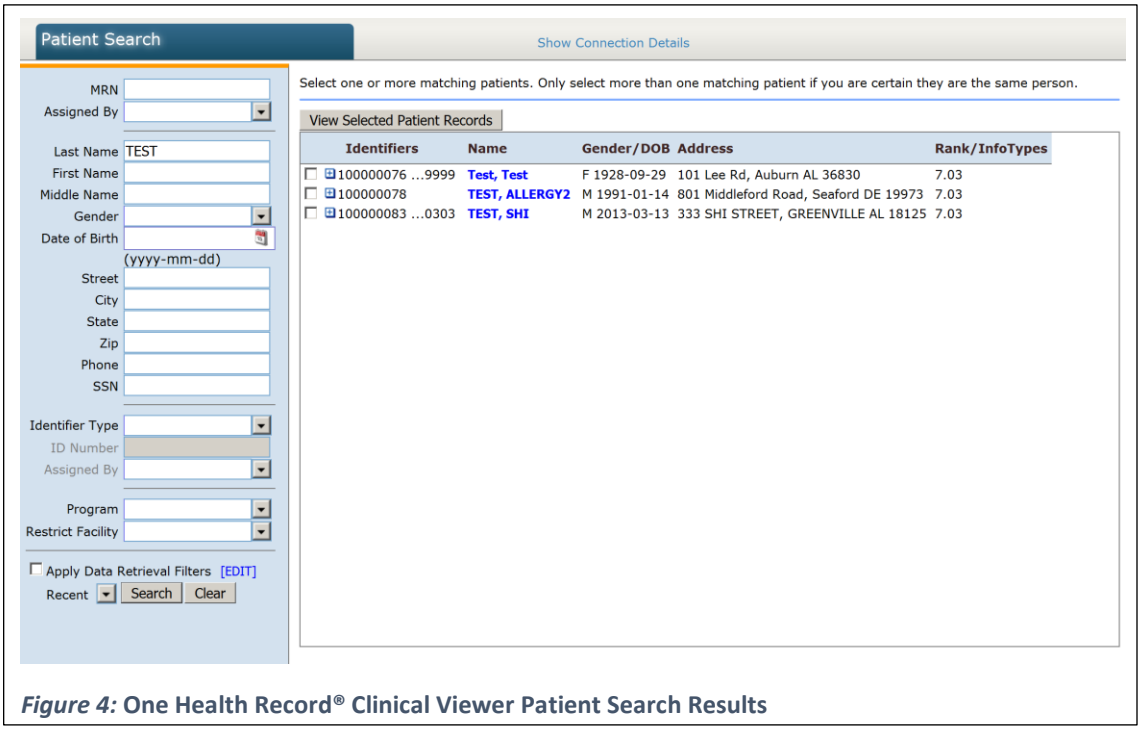

Figure 4: **One Health Record® Clinical Viewer Patient Search Results**

Click on the plus sign to the left of the patient name; nested under the master record will be a separate row representing each of the data sources that contributed data for this patient. Here we see the Master Patient Index (MPI) functionality of the Clinical Viewer at work, uniquely identifying this patient despite the demographics potentially having been entered slightly differently at each facility.

To view a patient's data, click on the Name, which is highlighted in blue.

If you click the patient's name in any row below the top row, you'll see only data from that particular source. Clicking the top row for the patient ensures you'll see all aggregated data from all sources in one normalized view.

Tip: if the blue search panel on the left moves out of sight, move your mouse cursor over the "greater than" symbol (>) on the left edge of the screen – the search panel will come back into view.

OPTING OUT PATIENTS

By default, the One Health Record® HIE is set up to follow 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.

If a patient has elected to opt out, the clinical portal and query functions will follow a zero disclosure policy. Therefore, a search for a patient who has opted out will return the message "No patients matched the search criteria".

There is a button in the Clinical Viewer patient search screen which can be used when a patient wants to opt out of the AHIE. To opt a patient out of HealthShare, start by doing a search for the patient, as described in the previous section; the "Opt Out" button will appear at the top of the results screen:

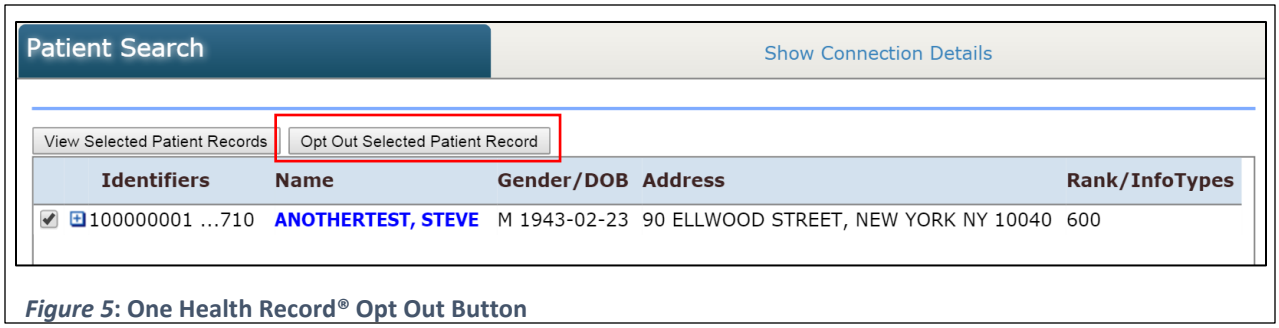

***Figure 5*: One Health Record® Opt Out Button**

You must click on the checkbox to the left of the patient in the search results before you click on the Opt Out button. It does not matter if you click on the top line for the patient or any of the contributing facility lines below the top line; as mentioned above, the patient will be marked as having opted out from ALL facilities that participate in the exchange.

When you click on the Opt Out button, you will be given a chance to confirm that you want to proceed; if you choose Cancel, no action will be taken.

If you confirm that you want to proceed, HealthShare will file a consent election for the selected patient saying that the patient has opted out, and that patients will no longer show up in searches within HealthShare.

If you opt out a patient and then the patient changes his or her mind, is it possible to remove the "opt out" election, but it has to be done by working with the Service Desk (send email to onehealthrecord@medicaid.alabama.gov or call 844-746-3540). If the patient is not already in the exchange, they need to be manually registered before they can be opted out. This would also be done through the Service Desk.