



CLINICAL VIEWER USER GUIDE

One Health Record®

Version 2016.1.3

October 25, 2016

Proprietary and Confidential Property of



This document contains proprietary and confidential information protected by laws pertaining to such material. This document, the information in this document, and all rights thereto are the sole and exclusive property of One Health Record®. They are intended for use by prospective clients, clients, and employees of One Health Record®. They may not be copied, used, or disclosed to anyone else, in whole or in part, without the express written permission of One Health Record®.

The product names and acronyms used herein are trademarks, service marks, and registered trademarks of One Health Record®. All other products names used herein are trademarks of their respective owners.

INTRODUCTION..... 4

LOGGING IN..... 5

PATIENT SEARCH..... 6

NAVIGATING IN THE WEB CLIENT 9

 Patient Data Screens 9

 Patient Summary Screen..... 9

 Opt-Out Patients 14

 Your User Profile 15

REPORTS..... 17

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 clinicians and other healthcare providers who will be using the healthcare exchange to access patient data.

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 (FLastname@alohr) and password provided to you previously. If you have any issues with login, please contact the Service Desk via email at onehealthrecord@medicaid.alabama.gov or call 844-746-3540.

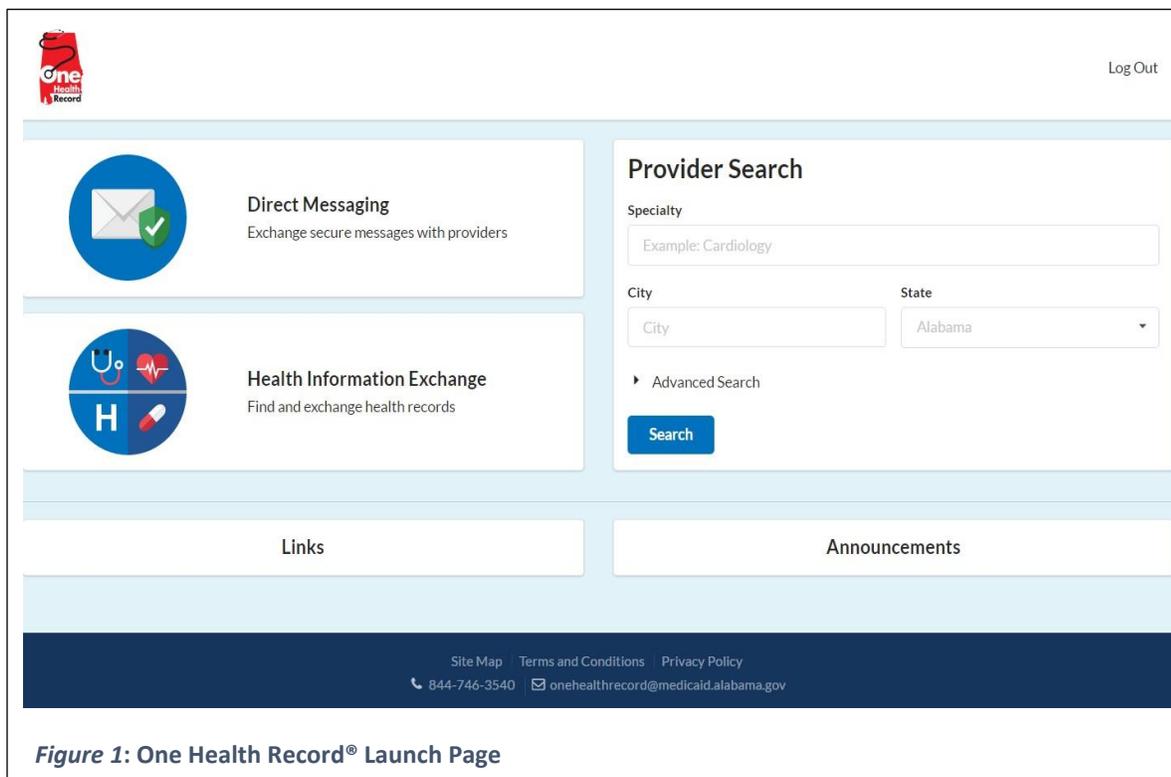


Figure 1: One Health Record® Launch Page

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:

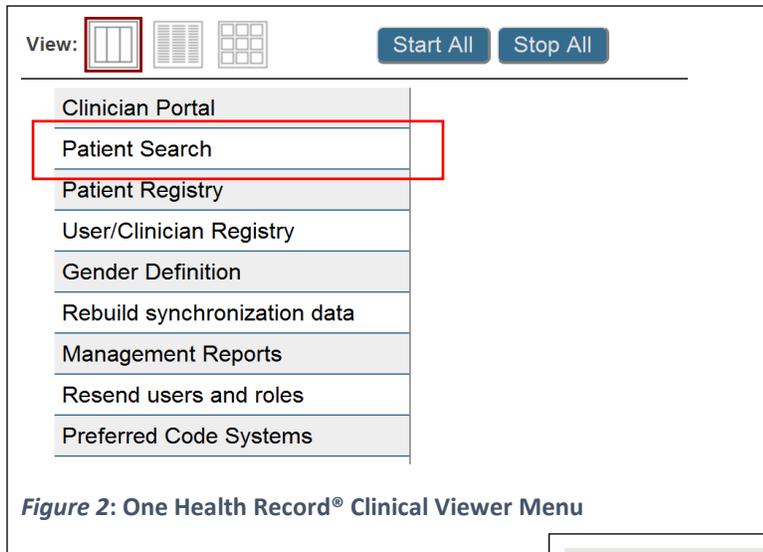


Figure 2: One Health Record® Clinical Viewer Menu

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.

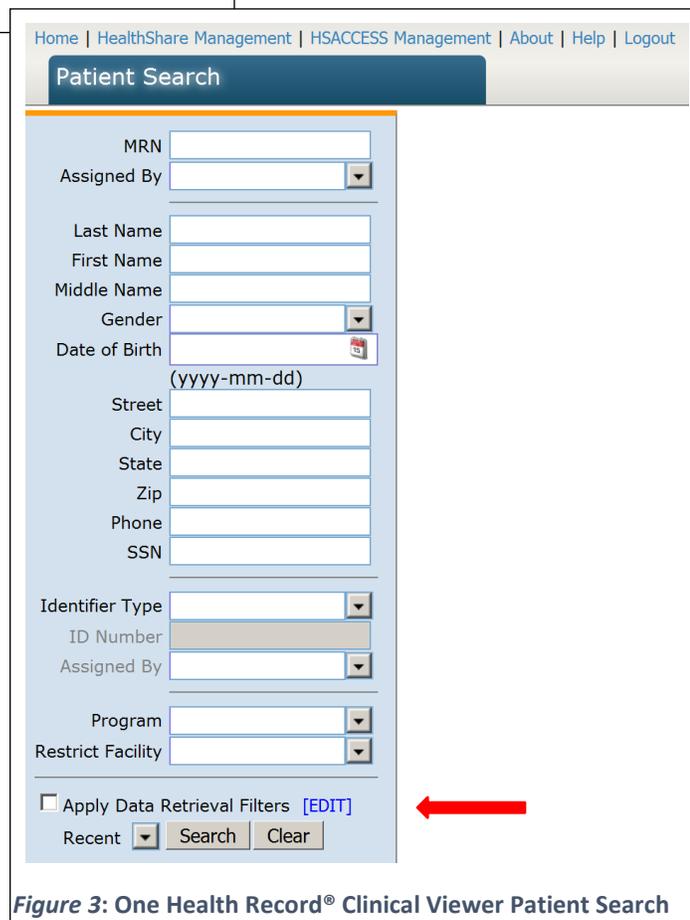


Figure 3: One Health Record® Clinical Viewer Patient Search

“Apply Data Retrieval Filters” (at the bottom of the “Patient Search” screen) gives you some additional options for selecting what data is pulled from the patient’s record. If you choose to use that feature, start by clicking on the [\[EDIT\]](#) link to specify what data types you want to see:

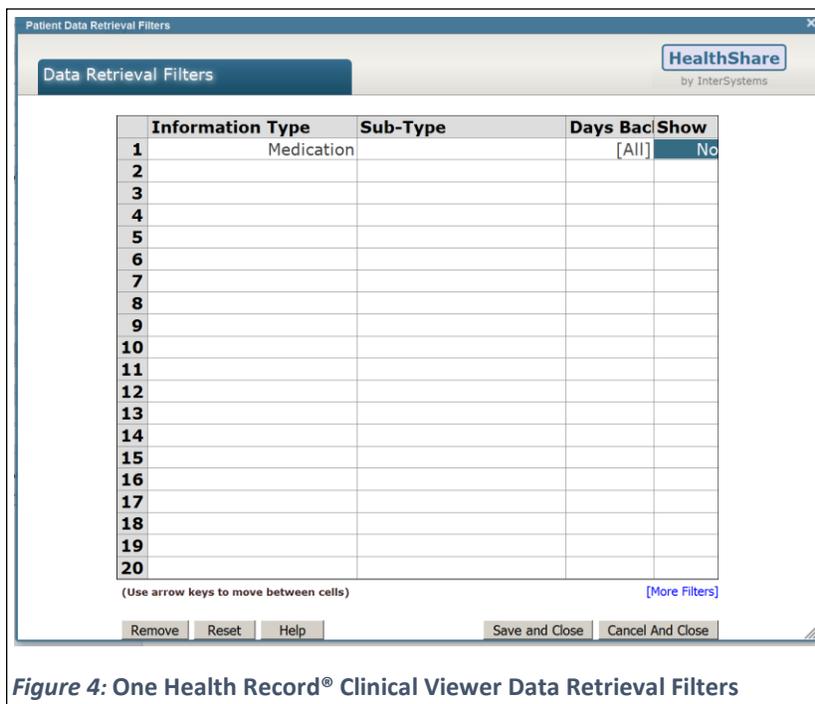
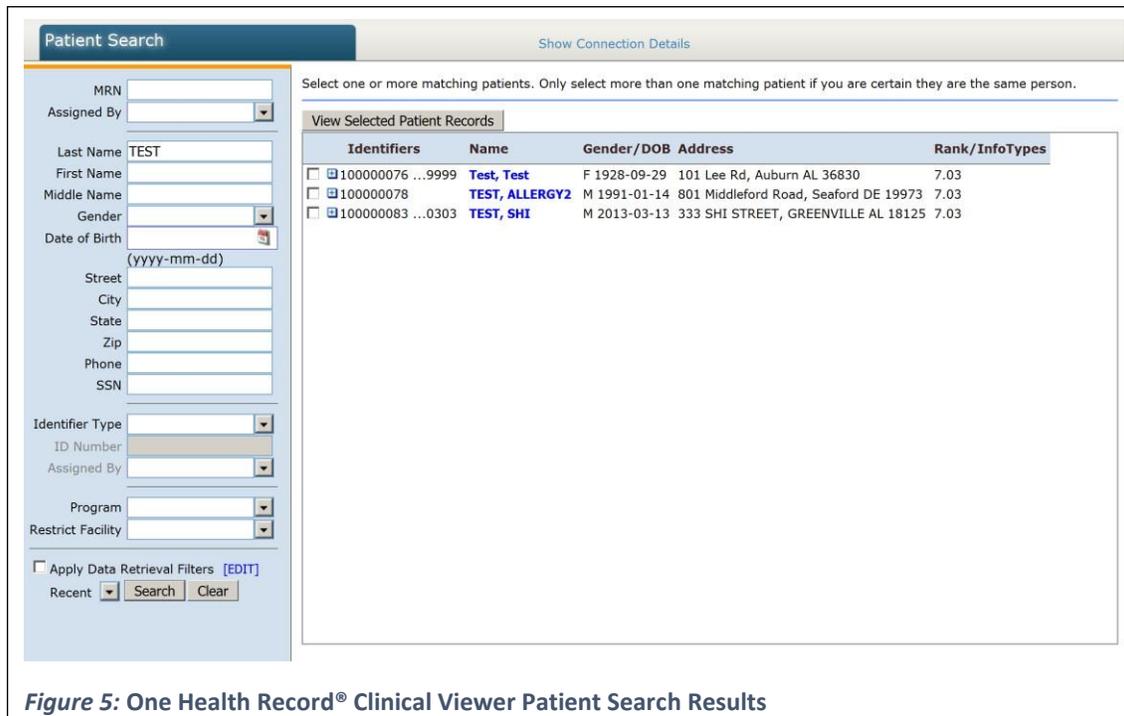


Figure 4: One Health Record® Clinical Viewer Data Retrieval Filters

Be sure to click the “Save and Close” button at the bottom of the “Data Retrieval Filters” screen after you enter all your requirements. If you do not see the row of buttons along the bottom, increase the popup window size by clicking on the lower right corner of the screen and dragging it further down.

Then click the “Apply Data Retrieval Filters” checkbox on the patient search screen to turn on the filtering you selected. Everything you see in the patient screens plus any reports you generate for this patient, will reflect the filtering you specify here. To clear or modify the filter, you must do the patient search again to re-retrieve this patient’s data.

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.



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.

NAVIGATING IN THE WEB CLIENT

Patient Data Screens

From the “Patient Data Screens”, you’ll see a main navigation menu along the top of the screen:



- **HealthShare Management Home:** The first link takes you to HealthShare’s home page.
- **Patient Search:** this link returns you to the Patient Search screen.
- **View Summary:** This is where you access clinical data summaries and printable reports of patient data. See the *Reports* section later in this document for detailed information about viewing and printing reports.
- **My Account:** This is where you can go to update your password and other details about your user profile. See the “Your User Profile” section below for details.
- **Logout:** use this link to log out of the Clinical Viewer. If you do not log out, HealthShare will discontinue your session after a certain period of inactivity.

Patient Summary Screen

Once you’ve selected a patient from the search screen, you will be taken to the Clinical Viewer’s summary page.

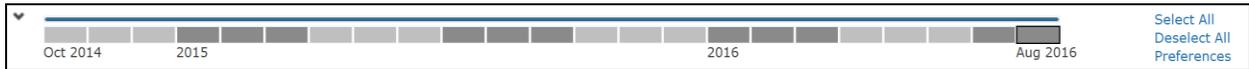


Figure 6: One Health Record® Clinical Viewer Patient Summary Screen

A few demographic details about the patient appear along the top of the screen (name, gender, DOB, and age):



Just below the demographic information is a timeline, which shows what months and years are associated with data that we have on file for this patient. It also gives you the ability to filter the information on the screen by date and time.



You can use the “Select All” and “Deselect All” links on the right, in combination with clicking on individual boxes, to view or hide specific periods of time from the display.

You can control the Timeline preferences, such as the start and/or end date of the timeline, by clicking in the “Preferences” link to the right of the timeline:

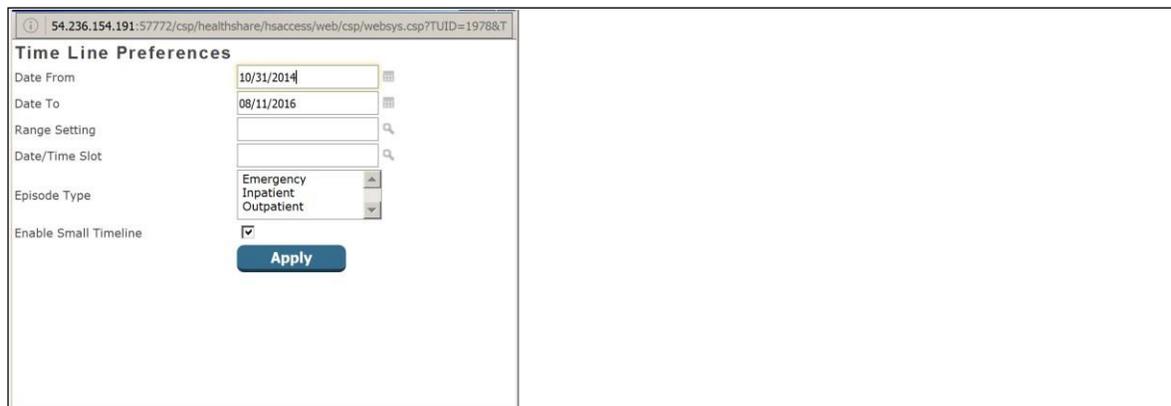


Figure 7: One Health Record® Clinical Viewer Time Line Preferences

The timeline actually controls what clinical data appears on the screen and in reports, in conjunction with any data filtering you did in the initial patient search. Only data that satisfies all filters you specified, and which you are authorized to see based on the exchange’s consent policies, will be displayed on the screen and in any reports you generate.

There are icons in the upper right-hand corner of the patient summary screen which represent shortcuts and warnings. The exact number of icons will vary by patient, but two common icons are:

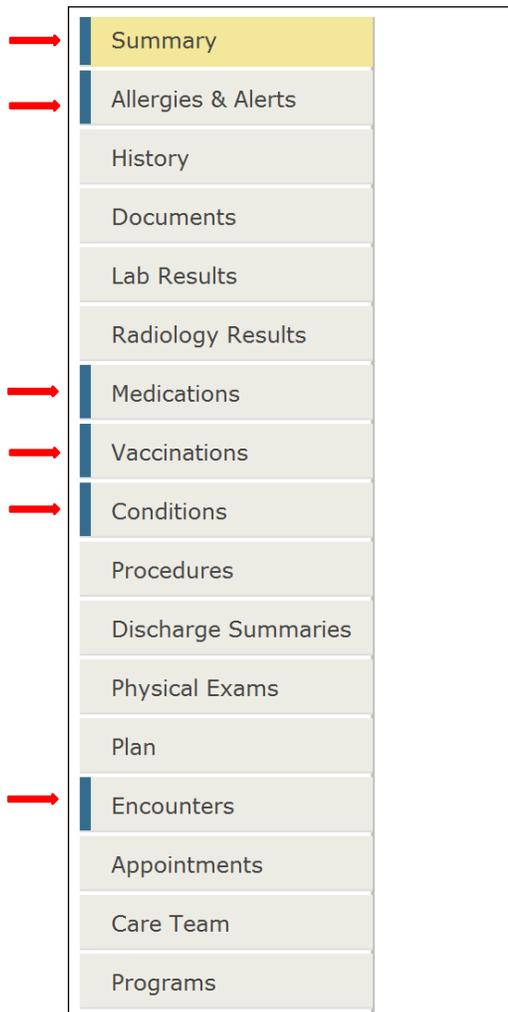
1.  the shortcut to view the patient’s demographic data; when clicked, a screen will pop up that shows the patient’s full name, contact information and some other non-clinical statistics:



Figure 8: One Health Record® Clinical Viewer Patient Demographic Data

2.  is an alert that this patient has allergies. If you click on this icon, an allergy detail screen will pop up.

Along the left side of the summary page you'll find a navigation menu that enables you to see at a glance what types of data are on file for this patient



**Figure 9: One Health Record®
Clinical Viewer Patient Summary Data**

A blue vertical bar indicates which sections actually contain data. In this example on the left, the patient has Allergies, Medications, Vaccinations, Conditions and Encounters on file at the HIE, but no Documents or Lab Results, etc.

The appearance (or lack of appearance) of the blue bars will be impacted by any data filtering that was done either via the timeline or the Data Filtering in the patient search screen. For example, if there were vaccinations given in 2015 but you've unselected 2015 in the timeline, the Vaccinations option will appear to be empty.

Similarly, if you created a Data Filter on the patient search screen to omit Vaccinations, no blue bar will appear next to Vaccinations in the left menu.

Click on any menu item that has a blue bar on it to navigate into that screen.

The main section of the summary page shows a high-level summary of recent data for that patient for each of the following data types: Allergies, Medications, Diagnoses, Documents, Laboratory Results, Radiology and Other Results:

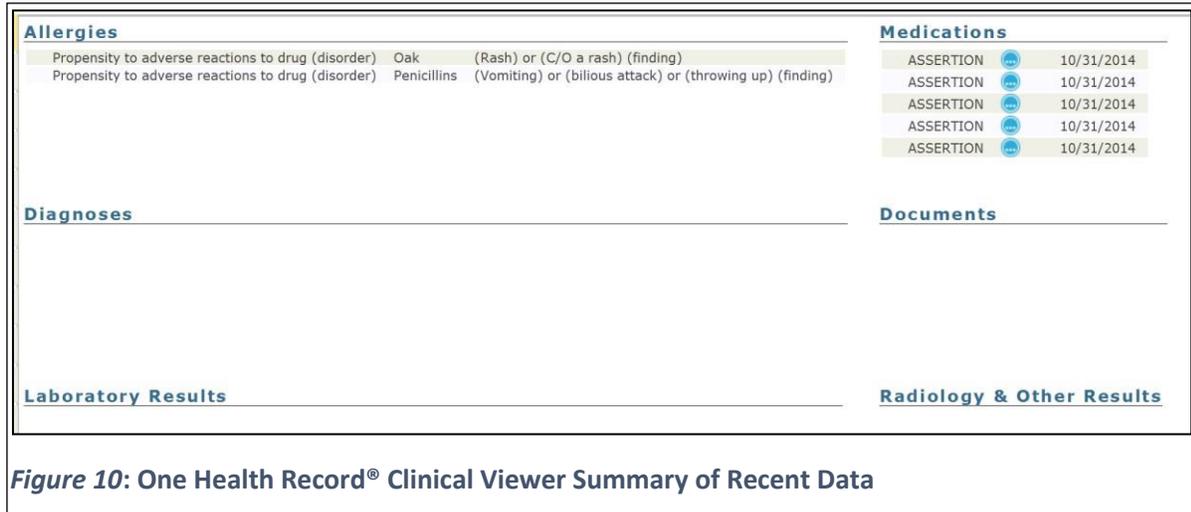


Figure 10: One Health Record® Clinical Viewer Summary of Recent Data

Below is an example of one of the individual data type screen - in this case, Medications:



Figure 11: One Health Record® Clinical Viewer Patient Medication Data

Note that some screens lead to sub-screens that display additional data. In those screens, the Clinical Viewer will display a circular blue icon which you can click on to access that additional information:

Medications

ASSERTION		10/31/2014

Recent patient searches

The Clinical Viewer provides a handy shortcut to find a patient you've already searched for. Click on the "Recent" dropdown in the lower left-hand corner of the screen and a popup will appear with links to the last patients you searched for. They will be listed in alphabetical order; click on one to go immediately to that patient's summary screen.

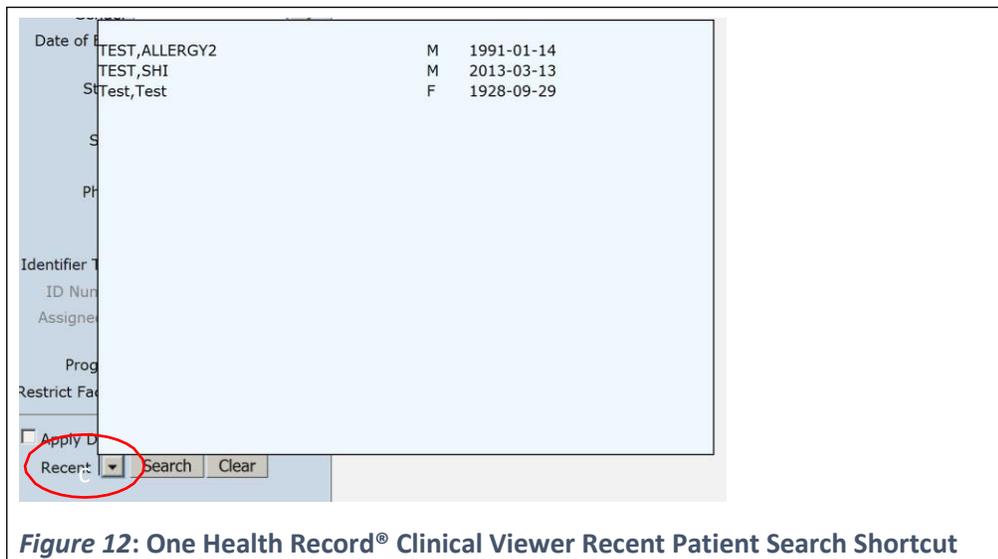


Figure 12: One Health Record® Clinical Viewer Recent Patient Search Shortcut

Opt-Out Patients

By default, the One Health Record® 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 One Health Record®. To opt a patient out of the exchange, start by doing a search for the patient in the Clinical Viewer; the "Opt Out" button will appear at the top of the results screen:

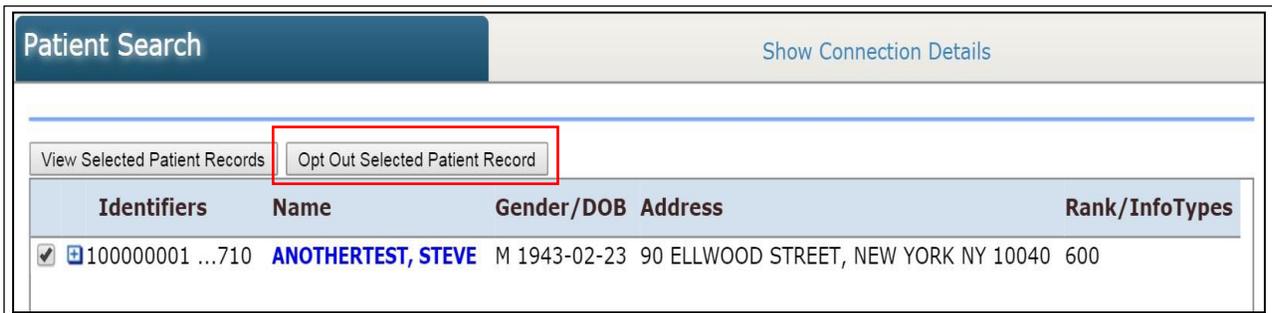


Figure 13: One Health Record® Opt Out Button

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, One Health Record® will file a consent election for the selected patient saying that the patient has opted out, and that patient will no longer display in the system.

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 Help 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 Help Desk.

Your User Profile

When you click on the “My Account” link in the top menu (over any patient data screen), a popup window appears with two tabs on it: Account and Preferences. Both give you some control over your environment within the Clinical Viewer,

- The **Account** tab enables you to update your demographic details, such as name and address, and also to update your password. To update your password, you must provide the current password, and then type in the new password twice. You can also provide a “challenge question” (any word, phrase or sentence you like) and the answer to that question. It will help you recover the password later if you forget it.

Figure 14: One Health Record® Clinical Viewer User Account

- The **Preferences** tab lets you specify your preferences for how the software will behave. These preferences apply to each user. For example, the time it takes for the system to time out is set in the Preferences tab.

The screenshot shows the 'My Account' page with the 'Preferences' tab selected. The page contains several sections for configuring user preferences:

- Account** | **Preferences**
- Leave blank to use system-wide defaults*
- Wait __ minutes before automatically logging out:
- Default patient report:
- Contract search results when more than __ patients are displayed:
- Hide patient search criteria when patients are displayed:
- Description to show for MyList:
- List Type:* Program Relationship
- My List*:
- Apply Data Retrieval Filters [\[EDIT\]](#)
-

Figure 15: One Health Record® Clinical Viewer Recent User Preferences

REPORTS

The Clinical Viewer provides many summary formats for viewing and printing patient data. These can be accessed from the patient summary screen (or any of its sub-screens) using the View Summary link in the top menu.

When you click on the View Summary link you will initially land in the web-based Patient Summary Report screen. The data will likely be too large to fit in the screen at one time, so use the browser scroll bar or page-down keys on your keyboard to view all the data.

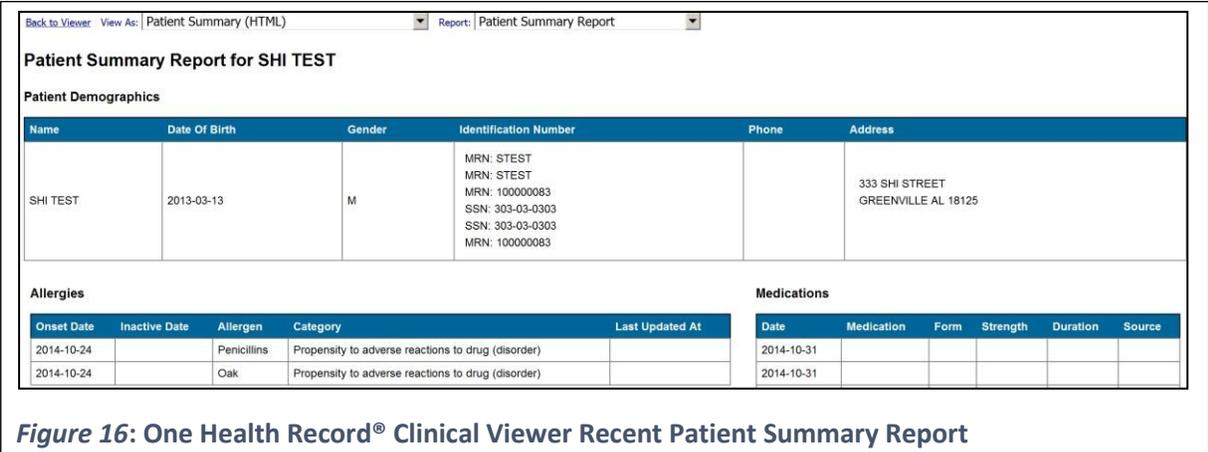


Figure 16: One Health Record® Clinical Viewer Recent Patient Summary Report

There are many other display and printing options available to you – some are meant to be “human readable” but most are really just for consumption by a computer. Click on the “View As” link to get a list of all the available options:

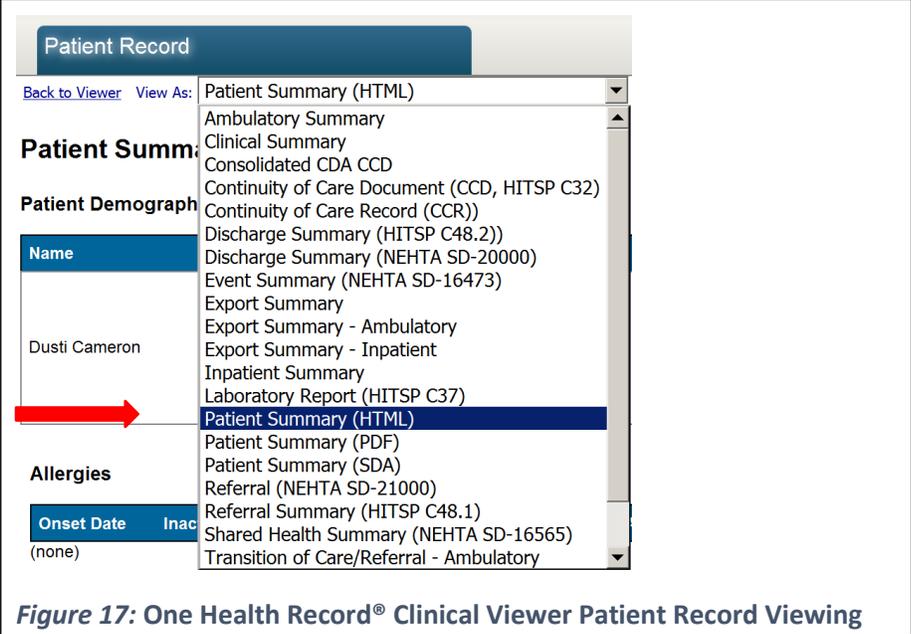


Figure 17: One Health Record® Clinical Viewer Patient Record Viewing

Patient Summary (PDF) is the option we recommend for printing. Once you have selected Patient Summary (PDF) you have another choice to make – under the Report menu you can choose the Classic (shorter) or Expanded report, depending on what level of detail you require.



Figure 18: One Health Record® Clinical Viewer Patient Summary Printing

To return to the patient data screen, click the “Back to Viewer” link in the upper left-hand corner.