



## Portal User Guide: CareAlign®

This Guide is a short walk through for patient searches. Most new users have said the portal is very user friendly and easy to navigate. All you need is the patient's First Name, Last Name and Date of Birth. The CareAlign® portal allows users to find and access the historical/clinical information through a handful of screens and tabs.

We hope the CareAlign® portal is easy to use but questions and assistance are a part of every integration. If you have any trouble accessing or using the portal please let us know and we will assist you. We're happy to have you and we're always interested in feedback from our users. Welcome to the SacValley MedShare Health Information Exchange Portal.

Contact : [support@sacvalleymys.org](mailto:support@sacvalleymys.org) with any questions you may have.

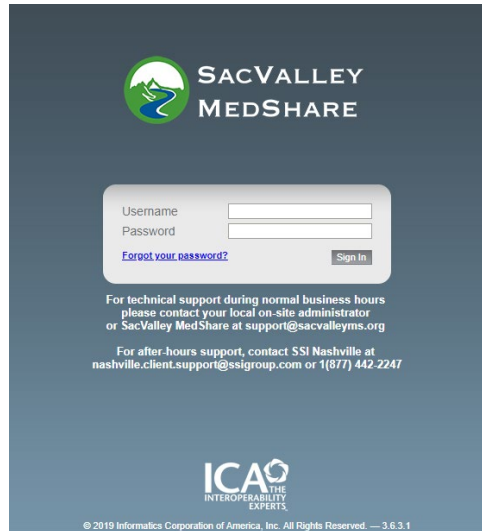


## Resources:

SacValley MedShare (SVMS) Homepage: <https://sacvalleymys.org/>

## Login:

CareAlign® Portal: <https://login.sacvalleymedshare.org/>



The contact information for SacValley MedShare and The SSI Group (ICA) is listed on the login page.

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## Logging In:

The first time you login to the system, you will have to set a new password. Input your current password, then type in a new password that meets the requirements listed, and then type it in again to verify it. When completed, click CHANGE.

**Change Password**

*You are changing your password because your account has been reset or you are accessing CareAlign Suite for the first time.*

- Length - Must be at least seven (7) characters long.
- Characters - Must contain characters from three (3) of the following four (4) classes:
  - Uppercase Characters ( A, B, C, D, ... Z )
  - Lowercase Characters ( a, b, c, d, ... z )
  - Numbers ( 1, 2, 3, 4, ... 9 )
  - Non-Alphanumeric Characters, such as punctuation symbols
- Uniqueness - This password has recently been used for this account. Please choose a new password.
- Username - Cannot contain your username.
- Partial Name - Cannot contain any part of your full name.
- Dictionary - Cannot be solely based on a word in the dictionary (weak).

Current Password  ! This value is required.

New Password

Confirm Password

**Change**

After clicking CHANGE, you will be taken back to the login page (a message will inform you that your new password has been saved) and login with your username and your new password.

*Your new password has been saved.*

Username

Password

[Forgot your password?](#) **Sign In**



After you login, you will need to setup your security questions. These will be needed if you need to reset your password. Once you fill them in, click SUBMIT.

**Security Questions**

1 Please select and answer questions from the options provided below.

1 Security questions are required for password recovery and to log in from an unsecure location.

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

**Submit**

You will then be taken to the CareAlign® Portal landing page.



## Portal Search Functions:

1. Search: Click this to access the HIE
2. Patient Last Name
3. Patient First Name
4. Date of Birth
5. Sex (M/F/U)
6. Extended search: This is checked by default
7. At the bottom of the Optional Demographics section is a drop-down box. It defaults to the CareAlign® Exchange. Put in city and zip to ensure it searches the eHealth eXchange (eHX) connections.
8. This drop-down menu also allows Portal users to search the eHX Network, which is optional. If you specifically only want one of the eHX connections, use this step.
9. Search

SacValley MedShare is always working with our partners to streamline the Portal's functions.

The screenshot shows the search interface of the SacValley MedShare portal. It includes a 'Menu' and 'Search' button at the top (1). Below is the 'Patient Identifiers' section with an 'MRN' field. The 'Patient Demographics' section contains fields for 'Last' (2) and 'First' (3) names, 'SSN', 'DOB' (4) with a date picker, and 'Sex' (5) with a dropdown menu. An 'Extended Search' checkbox is checked (6). The 'Optional Demographics' section includes fields for 'Mid Nm', 'City', 'Zip', 'Phone', and 'Email'. At the bottom of this section is a dropdown menu (7) currently set to 'CareAlign Exchange' (8). A 'Clear' button (9) and a 'Search' button are at the very bottom.



## Community Search (default):

This is the default search option for the SacValley MedShare HIE. By selecting the SEARCH tab on the static left side of the portal, users can search by entering patient demographics or medical record numbers.

Community Search results will display the various organizations that have matching patient records. Patient First Name, Last Name and Date of Birth are required information. Sex is a required field but "Unknown" is eligible. The only required fields are name, date of birth, and sex. If you want to ensure that all other connections are also searched, like eHealth eXchange, enter two optional demographics, like city and zip code.

PL: Extended Search PC: MG: ADM:

Extended Search

Results were found.

**TEST, HIESART**  
120 Years Old - 01/01/1900 - F

Location	ID
<input checked="" type="checkbox"/> Shasta Regional Medical Center	M000625466
<input checked="" type="checkbox"/> Canby Family Practice Clinic	TESHIE0002
<input checked="" type="checkbox"/> Seneca Hospital	075727
<input checked="" type="checkbox"/> Mountain Valleys Health Centers	20958
<input checked="" type="checkbox"/> goo	1588778751651867407158

View Selected Charts

Search Criteria (Left Panel):  
 MRN: [ ]  
 Patient Demographics:  
 Last: test  
 First: hiesart  
 SSN: [ ]  
 DOB: 01 / 01 / 1900  
 Sex: Female  
 Extended Search:   
 Optional Demographics:  
 Mid Nm: [ ]  
 City: [ ]  
 Zip: [ ]  
 Phone: [ ]  
 Email: [ ]  
 CareAlign Exchange: [ ]



Click on Clinical History to get everything for the patient. To ensure that none of our Portal users misses any information, CareAlign® will automatically alert users who if there are additional documents to view. Both Community Searches and Exchange Searches will display the same alerts. The screenshot below has a green banner alerting the user to additional documents available.

This screenshot shows the patient chart for M000625466, TEST, HIESART. A green banner at the top of the clinical history section reads: "Additional documents are available. View them". The clinical history table below shows records from 2019 and 2018, including X-ray and lab results.

Year	Date	Description	Source	Author
2019	01/28/19	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> CT HEAD WO CONTRAST	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
2018	12/03/18	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> XR STERNUM	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> XR SPINE AP VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
2017	04/13/17	<input type="checkbox"/> DISCHARGE SUMMARY	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
		<input type="checkbox"/> HISTORY AND PHYSICAL	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
04/06/17		<input type="checkbox"/> Lab - CBC W Auto Differential panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
		<input type="checkbox"/> Lab - PROTHROMBIN TIME INR	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
		<input type="checkbox"/> Lab - Comprehensive metabolic 2000 panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G

By clicking "View them" you can see additional clinical records appeared. The original records from Seneca Hospital and Shasta Regional Medical Center remain but now there's additional CareAlign® Exchange records. The source of the data may vary depending on how that data was sent to SacValley.

This screenshot shows the same patient chart as above, but with additional records from CareAlign Exchange. A new entry for 01/27/19 is visible, along with a Patient Summary for 12/02/18.

Year	Date	Description	Source	Author
2019	01/28/19	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> CT HEAD WO CONTRAST	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	01/27/19	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
2018	12/03/18	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> XR STERNUM	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
		<input type="checkbox"/> XR SPINE AP VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	12/02/18	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
2017	09/28/17	<input type="checkbox"/> z_CCD: Scan Document	SENECA HEALTHCARE DISTRICT	SULLEN'S, JACOB
		<input type="checkbox"/> Patient Summary (HL7 CCD)	CareAlign Exchange	SULLEN'S, JACOB
04/13/17		<input type="checkbox"/> DISCHARGE SUMMARY	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
		<input type="checkbox"/> HISTORY AND PHYSICAL	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
04/06/17		<input type="checkbox"/> Lab - CBC W Auto Differential panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
		<input type="checkbox"/> Lab - PROTHROMBIN TIME INR	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
		<input type="checkbox"/> Lab - Comprehensive metabolic 2000 panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G



## eHealth eXchange (eHX) Data Search:

eHX is a group of organizations that are connected to the national eHealth eXchange data network. This information is available to SacValley and only requires a separate search if these are the only documents you want to view; the network is maintained by the Sequoia Project <https://sequoiaproject.org/> and regulated under the Federal and California Data Use and Reciprocal Agreements (DURSA's).

**SACVALLEY MEDSHARE**

Menu Search

Patient Identifiers

MRN

Patient Demographics

Last:

First:

SSN:

DOB:  /  /

Sex:

Extended Search

Optional Demographics

Mid Nm:

City:

Zip:

Phone:

Email:

eHx Stanford Health C:

- CareAlign Exchange
- eHx Dignity Health
- eHx UC Davis
- eHx Stanford Health Care**

Search Results in Clinical History

**SACVALLEY MEDSHARE**

PL: Extended Search PC: XXTEST, TELESTROKE MG: ADM:

Patient Chart

078906 **XXTEST, TELESTROKE** (04/10/1980 - 40 Years Old F) PCP: TEST, NELSON

Messages 0/10 **READ ONLY**

Menu Search

Clinical Results History Summaries Search

Clinical History Labs Fast Labs Deleted

**X Clinical History** 078906 - XXTEST, TELESTROKE (04/10/1980 - 40 Years Old F)

Search: Body Title:  Author:  [Clear]

All My CareAlign Exchange

Check All / None / Toggle Move

0 additional documents were found.

2020

06/05/20	Continuity of Care Document	UC Davis Health
	Telephone Summary	UC Davis Health
	Office Visit Summary	UC Davis Health
	Chart Update Summary	UC Davis Health
	Orders Only Summary	UC Davis Health
	Office Visit Summary	UC Davis Health
	Office Visit Summary	UC Davis Health
	Chart Update Summary	UC Davis Health

Clear Search





## Navigating the CareAlign® Portal:

PL: Extended Search    PC: TEST, HIESART    MG:    ADM:

**Extended Search**

Results were found.

**TEST, HIESART**  
119 Years Old - 01/01/1900 - F

Location	ID	Last Name	First Name	Sex	SSN	DOB
<input checked="" type="checkbox"/> Shasta Regional Medical Center	M000625466	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> Canby Family Practice Clinic	TESHIE0002	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> Seneca Hospital	075727	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> CareAlign Exchange	97d600b5-d02e-450e-894f-b64043e3352d	TEST	HIESART	F		01/01/1900

[View Selected Charts](#)

After performing a patient search, and selecting the desired facility records, click on **VIEW SELECTED CHARTS** button. Click on one of the Clinical History, History, Summaries, tabs and click a category to view patient documents.

**Patient Chart**

M000625466 TEST, HIESART (01/01/1900 - 119 Years Old F)

Aliases 2/2 **READ ONLY**

Clinical Results | History | Summaries | Search

Clinical History | Labs | Fast Labs | Deleted

Clinical History provides a summary of patient records and is a useful place to begin a search. It contains CCDs provided by HIE members, it created an on-demand CCD (Patient Summary HL7 CCD) compiled from discrete data from various HL7 ADT records, along with laboratory data.

**Patient Chart**

M000625466 TEST, HIESART (01/01/1900 - 119 Years Old F)

Aliases 2/2 **READ ONLY**

Clinical Results | History | Summaries | Search

Clinical History | Labs | Fast Labs | Deleted

**Clinical History** M000625466 - TEST, HIESART (01/01/1900 - 119 Years Old F)

Search: Body Title Author [Clear]

Check All / None / Toggle Move

0 additional documents were found.

01/20/19	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	<input type="checkbox"/> CT HEAD W/ CONTRAST	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
01/27/19	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
12/03/18	<input type="checkbox"/> XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	<input type="checkbox"/> XR STERNUM	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	<input type="checkbox"/> XR SPINE AP VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
12/02/18	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
09/20/17	CCDA: Scan Document Patient Summary (HL7 CCD)	Seneca Healthcare District CareAlign Exchange	SULLEN S, JACOB SULLEN S, JACOB
04/13/17	<input type="checkbox"/> DISCHARGE SUMMARY	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
	<input type="checkbox"/> HISTORY AND PHYSICAL	M000625466@Shasta Regional Medical Center	STRUVE, STEVEN
04/06/17	<input type="checkbox"/> Lab - CBC W Auto Differential panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
	<input type="checkbox"/> Lab - PROTHROMBIN TIME INR	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
	<input type="checkbox"/> Lab - Comprehensive metabolic 2000 panel	M000625466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G



FAST LABS option will allow you to view lab results in 6-month intervals.

**Fast Labs** 140225-140225 - Test, Hiemh (01/01/1900 - 118 Years Old F)

Vault	MRN	Date/Time	Category	Results	Ordered By
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Urine Studies	UA ALIQUOT VOLUME: 10 ml UA COLLECTION TYPE: VOIDED COLOR, URINE: YELLOW CLARITY, URINE: CLEAR PH, URINE: 6.0 SPECIFIC GRAVITY, URINE: == PROTEIN, URINE: NEGATIVE GLUCOSE, URINE: NEGATIVE KETONES, URINE: NEGATIVE OCCULT BLOOD, URINE: TRACE-INTACT NITRITES, URINE: NEGATIVE BILIRUBIN, URINE: NEGATIVE UROBILINOGEN, URINE: 0.2 LEUKOCYTE ESTERASE URINE: NEGATIVE CULTURE INDICATED, URINE: NOT IND WBC, URINE: 0-4 RBC, URINE: 3-10 BACTERIA, URINE: FEW SQUAMOUS EPITHELIAL CELL, UR: NONE SEEN MUCUS STRANDS. MODERATE CAL OXALATE CRYSTALS. 2-	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Coagulation	PROTHROMBIN TIME: 15.0* INR: 1.4	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Coagulation	PARTIAL THROMBOPLASTIN TIME: 29	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Chemistry	GLUCOSE: 162* SODIUM: 139 POTASSIUM: 3.9 CHLORIDE: 102 TOTAL CARBON DIOXIDE: 33.9* ANION GAP: 3* BLOOD UREA NITROGEN: 23* CREATININE: 0.72 *eGFR: 72 BUN: CREATININE RATIO: 31.9 CALCIUM: 9.1 ALBUMIN: 1.7	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Hematology	WHITE BLOOD COUNT: 6.0 RED BLOOD COUNT: 3.43* HEMOGLOBIN: 9.7* HEMATOCRIT: 30.1* MEAN CORPUSCULAR VOLUME: 87.6 MEAN CORPUSCULAR HEMOGLOBIN: 28.1 MEAN CORPUSCULAR HGB CONC: 32.1* RED CELL DISTRIBUTION WIDTH: 15.7* PLATELET COUNT: 159 MEAN PLATELET VOLUME: 7.6 NEUTROPHILS % (AUTO): 60.6 LYMPHOCYTES % (AUTO): 13.1 MONOCYTES % (AUTO): 17.2* EOSINOPHILS % (AUTO): 8.6* BASOPHILS % (AUTO): 0.5 NEUTROPHILS # (AUTO): 3.7 LYMPHOCYTES # (AUTO): 0.8* MONOCYTES # (AUTO):	CHAMBERS MD, RONALD G

The History tab is a more detailed list of patient encounters and is most useful when searching for specific patient encounter(s). This tab contains in depth information not found in the Clinical History summary section. Textual information such as radiology reports, physician notes, patient history, etc. This section provides a more longitudinal view of a patient’s medical record.

**Visit History** 140225-140225 - Test, Hiemh (01/01/1900 - 118 Years Old F)

ACCT No.	Visit Date/Time	Discharge	MRN	Vault	Status	PL Type	Provider	Fac.	Loc./Unit	Complaint
5160711	12/19/2018 11:32:00		140225	Shasta Community Health Center	ACT	Outpatient	Choudhry MD, Sara			
5025224	10/10/2018 17:08:00	10/10/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4972317	09/13/2018 09:14:00	09/13/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
53402	08/29/2018 08:10:20		53402	Shingletown	ACT	R			SMC	
4938181	08/24/2018 14:21:00	08/24/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4907351	08/09/2018 07:22:00	08/09/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4891361	08/01/2018 08:09:00	08/01/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4888439	07/18/2018 15:33:00	07/18/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4821194	06/25/2018 09:19:00	06/25/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4814285	06/20/2018 11:30:00	06/20/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4814052	06/20/2018 00:00:00	06/20/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				

### Printing:

**Document:** Click on the Printer icon to the right of the screen of any tab.

**Labs:** To print labs, click on the lab from the **Clinical History** screen. See step 9.

**Note:** The Lab tab, highlighted above, will open a spreadsheet view of the labs but that view does **NOT** print as a spread sheet document. Each lab comes out on a separate “block” of information.



### Security Override/Breaking the Glass:

1. Search for the patient.

Patient Demographics

Last

First

SSN

DOB /  /

Sex  ▼

Extended Search

2. Click **View Selected Charts**
3. Click on the lock on the **Secured Data** button
  - a. If you do not see the Secured Data Button, click on Clinical History to force it.

Patient Chart

M000625466 T

Aliases

Clinical Results Hi

**Clinical History** Lit

4. You will be presented with the Security Override screen.

PL: Extended Search    PC: Security Override    MG:    ADM:

**Security Override**

⚠ You are trying to access secured data. This action will be reported and can be audited.

Choose override reason ▼

**Cancel**    **Override Security**

5. Click on the drop-down for

Choose override reason ▼



6. Choose one of the reasons or you can choose OTHER and type in your own reason.

Choose override reason ▼

Choose override reason

Permissions are wrong

Emergency need

Suspicion of Abuse

Other

Other ▼

Writing Documentation on how to break the glass

Cancel
Override Security

7. Click on **Override Security**

8. This will take you back to the Patient Chart. You will notice that everything except the chart is greyed out and the Secured Data notice is unlocked.

9. You can now move around the chart and get the information you are needing.

10. When you are finished with the chart, you will need to click on the unlocked button to relock the chart.



### Quick Patient Search:

If a user is looking for a specific patient record from a known healthcare provider that is connected to SVMS, the standard expanded search process is not necessary. Simply type in the known information such as last name or MRN and click "search."



## No Patient Data:

If the patient doesn't return any documents in the HIE, please check the date your requesting and compare it to the list below. If the request falls after the date there should be data. Another reason for no pt data is because the pt can "opt-out" of having their data submitted to the HIE or they may be a confidential patient.

If there are not records in the HIE, and you've verified the name, DOB & sex are correct, you'll have to do the paper method.



## CURES Reports:

1. Search for the patient as you normally would.

Patient Demographics

Last

First

SSN

DOB /  /

Sex

Extended Search

2. Click **View Selected Charts**
3. At the top of the Patient Chart, there will be a CURES button.

QM00014823 Doe, John (01/06/1990 - 31 Years Old F)

**READ ONLY** **CURES**

Clinical Results | History | Summaries | Search

Clinical History | Labs | Fast Labs | Deleted

4. Click on the **CURES** button.
5. If the patient has a report, it will display, if not, there will be no results returned. You can print the report to PDF, but this will count in the State database as checking CURES.

**CURES Information** QM00014823 - Doe, John (01/06/1990 - 31 Years Old F)

CareAlign Patient Information

Current Patient Address ### Ironwood Streett, Vacaville, CA 93301  
 Phone (H) + 707 555 1212 x  
 Phone (W) + 707 944 4400 x  
 SSN XXX-XX-7852  
 Race Nat American/Eskimo/Aleutian  
 Religion Christian  
 Marital Status Single

CURES Patient Information

Name JOHN DOE  
 Patient Identification Number 111282  
 Date of Birth 06/01/1990 (31 Years Old)  
 Gender F  
 Address ### IRONWOOD STREETT  
 VACAVILLE, CA 93301

Medications Dispensed

Fill Date	Prescriber	Pharmacy	Drug	Days Supply	Quantity	Strength
09/12/2020	PRESCRIBER 38 PRESCRIBER 38 DEA Number: undefined NPI: -	PHARMACY 11 State License Number: PHY00010	DRUG 1	5	30.0 AC	650 MG-100 MG - TAB

Rx#:16348388;PaymentMethod:Com.Insurance;SpeciesCode:01;Refill#:0;RefillsAuthorized:0