Portal User Guide: CareAlign®

This Guide is a short walk though 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@sacvalleyms.org with any questions you may have.



Resources:

SacValley MedShare (SVMS) Homepage: https://sacvalleyms.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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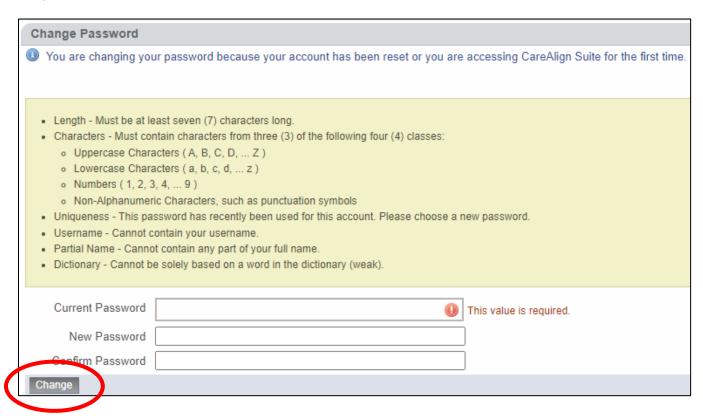
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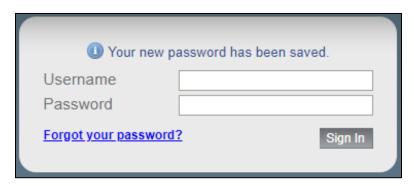


Logging In:

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.



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.







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		
Please select and an	swer questions from the options provided below.	
Security questions a	e required for password recovery and to log in from an unsecure lo	cation.
Question 1:		~
Answer 1:		
Question 2:		~
Answer 2:		
Question 3:		~
Answer 3:		
Submit		

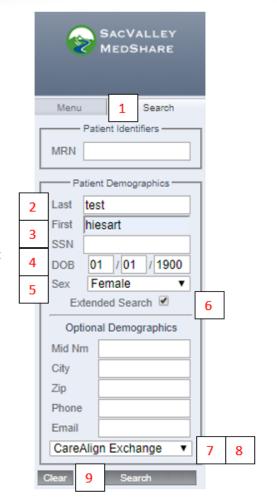
You will then be taken to the CareAlign® Portal landing page.



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.



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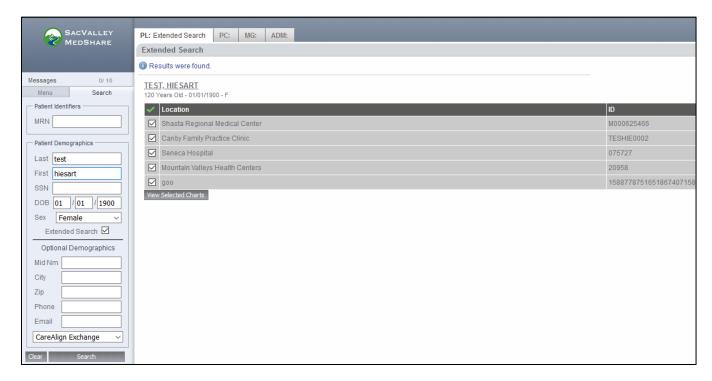




Community Search (default):

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.

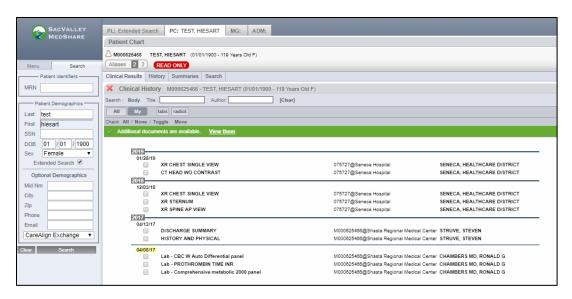
Community Search results will display the various organizations that have matching patient records. Patient First Name, Last Name and Date of Birth are required information. Sex is a required field but "Unknown" is eligible. The only required fields are name, date of birth, and sex. If you want to ensure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



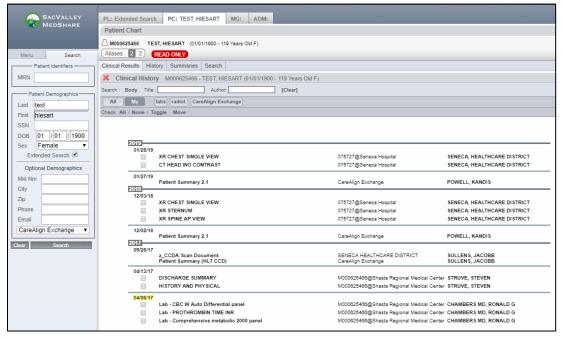




Click on Clinical History to get everything for the patient. To ensure that none of our Portal users misses any information, CareAlign® will automatically alert users who if there are additional documents to view. Both Community Searches and Exchange Searches will display the same alerts. The screenshot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



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.





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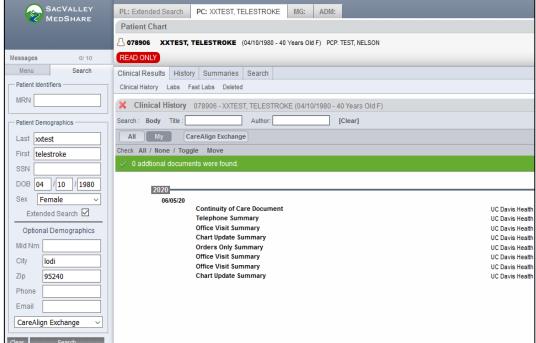


eHealth eXchange (eHX) Data Search:

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).



Search Results in Clinical History







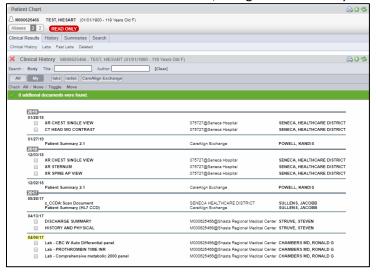
Navigating the CareAlign® Portal:



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.



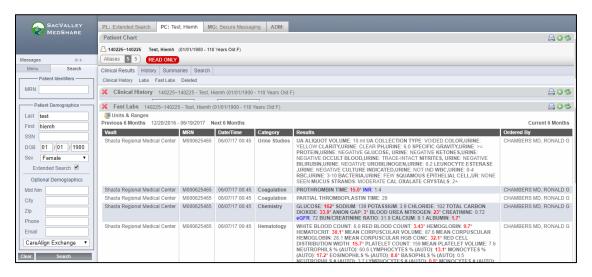
Clinical History provides a summary of patient records and is a useful place to begin a search. It contains CCDs provided by HIE members, it created an on-demand CCD (Patient Summary HL7 CCD) compiled from discrete data from various HL7 ADT records, along with laboratory data.



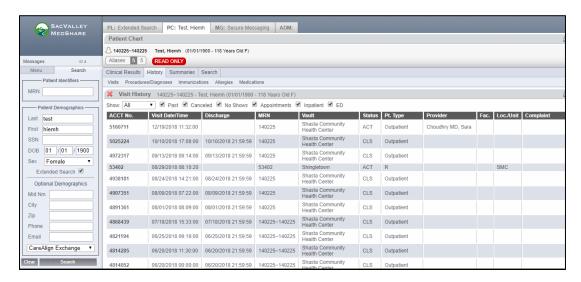




FAST LABS option will allow you to view lab results in 6-month intervals.



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.



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.

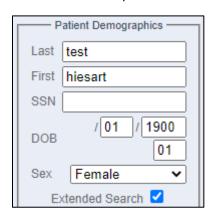




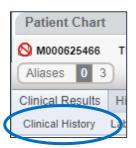


Security Override/Breaking the Glass:

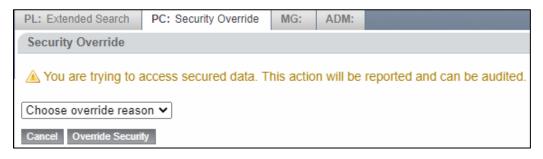
1. Search for the patient.



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



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



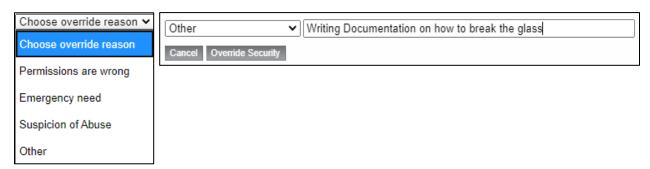
5. Click on the drop-down for



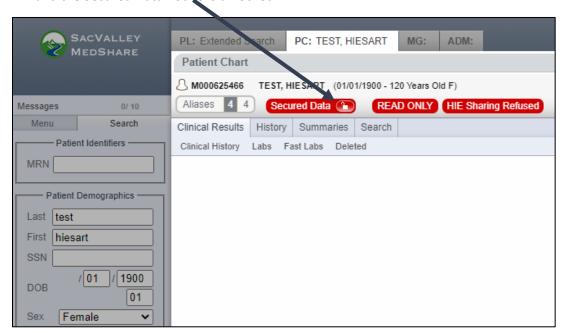
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6. Choose one of the reasons or you can choose OTHER and type in your own reason.



- Click on Override Security
- 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:

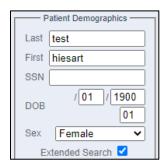
If the patient doesn't return any documents in the HIE, please check the date your requesting and compare it to the list below. If the request falls after the date there should be data. Another reason for no pt data is because the pt can "opt-out" of having their data submitted to the HIE or they may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

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CURES Reports:

1. Search for the patient as you normally would.



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



- 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.

