FusionFX® Patient Portal 5.3.3
Provider User Guide
## Contents

### 1 Getting Started
- Signing In and Signing Out .................................................. 8
- Screen Layout ........................................................................... 9
- Navigation .................................................................................. 10
- Tool Tips and Truncated Items .................................................. 11
- Data Sources .............................................................................. 11

### 2 My Secure Mail
- Introduction ............................................................................... 13
- Mailbox Organization ............................................................... 14
- Read, Print, Reply, and Assign .................................................. 16
  - Read a Message ........................................................................ 16
  - Print a Message ....................................................................... 17
  - Reply to a Message .................................................................. 17
  - Assign a Message to Another Provider .................................... 18
- Send New Messages .................................................................... 19
  - Send a Standard Message ....................................................... 19
- Appointment Scheduling ............................................................ 21
- Manage Messages ........................................................................ 24
  - Move a Message ....................................................................... 24
    - In a Folder ........................................................................... 24
    - In an Open Message .......................................................... 25
  - Permanently Delete a Message ................................................ 25
- Registration and Proxy Requests .............................................. 26
  - Registration Requests ............................................................ 26
    - Confirm Registration ......................................................... 27
    - Refuse Registration ........................................................... 28
  - Proxy Requests and Terminations ......................................... 29
    - Approve Request .................................................................. 30
    - Deny Proxy Request ........................................................... 31
    - Request Patient Approval .................................................... 32

### 3 Patient Summary
- Retrieve a Patient's Records ..................................................... 33
- Organization ............................................................................... 34
- Patient Banner .......................................................................... 35
  - Provider Groups ..................................................................... 35
- Download Patient Data .............................................................. 36
- Portlets: Shared Capabilities ..................................................... 38
  - Page and Refresh Controls ..................................................... 38
  - Data Sources ........................................................................... 38
4 Patient Search

Getting Started ................................................. 67
Search By Name .................................................. 68
<table>
<thead>
<tr>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search By ID</td>
</tr>
<tr>
<td>Search Results</td>
</tr>
</tbody>
</table>

**Index**  

71
Chapter 1
Getting Started

The FusionFX® Patient Portal is a secure web site that helps you provide quality healthcare by giving you “at a glance” information about a patient’s health status. It also enables you to share information privately and securely with your patients and colleagues.

The Patient Portal is a configurable application that can be tailored by your system’s administrators in many different ways to meet your site’s specific requirements. A simple example is that the formats used for dates and times can be set locally. Therefore, the screens shown in this guide are only examples; the screens you see might differ from them. What you see and what you can do in the portal might also vary from what's described here, depending on the security permissions that have been assigned to you.

Note: If your site includes both the FusionFX Patient Portal and the FusionFX Provider Portal, be aware that they were not designed to be run concurrently with the same browser. Doing this might cause session conflicts between these applications. It is recommended that they be run separately.

In this chapter you will learn these things:

• How to sign into and sign out of the Patient Portal (page 8).
• How data and functions are arranged on-screen (page 9).
• How to access the portal’s various functions (page 10).
• How tool tips are used to provide extra information about an item (page 11).
• How to recognize the source of displayed data when information from multiple sources is being displayed (page 11).
Signing In and Signing Out

Note: Your credentials for using the Patient Portal (user ID and password) are issued by your site’s Patient Portal system administrator. This is the person you must contact if you do not have these credentials or have forgotten them.

To help ensure the security and confidentiality of the patient information displayed by the Patient Portal, you must sign into it every time you access the portal. You do this using the Sign In dialog box:

In the Welcome to Provider Services box, type your User ID and Password in their respective text boxes, and then click the Sign In button.

Note: When your site upgrades to a newer version of Patient Portal, clicking the link in the Need Help? box enables you to download the revised version of this user guide.

If your portal session is automatically closed because you are not actively working in the portal, you will be required to sign in again.

When you have finished your portal work session, you sign out by clicking the Sign Out button in the upper-right corner of the portal:
Screen Layout

All the screens in the Patient Portal have a similar structure:

1. **Portal header**: The header identifies the web site, contains a link to this user guide, and it contains the Sign Out button that you click to end your work session in the Patient Portal.

2. **Navigation area**: This area contains the links (referred to as “tabs” and “subtabs”) that you use to navigate within the Patient Portal. For instructions and more information, see page 10.

3. **Patient banner**: The patient banner is only displayed on the Patient Summary tab. It identifies the person whose medical records have been retrieved into the Patient Portal using any of the methods described on page 33. The two buttons on the right are used to assign this patient to a care group and to download a copy of the patient’s healthcare data. When the items displayed on screen extend below the Patient Portal’s browser window, the patient banner and the items above it remain in place as you scroll down to view the additional information. For more about the patient banner, see page 35.

4. **Portlets**: These are the areas on a tab or subtab where you view data or interact with the Patient Portal. Every tab or subtab contains at least one portlet.
Navigation

The Patient Portal organizes your patients’ personal information and healthcare data using tabs, subtabs, and portlets, which are all defined below. The table of contents for this help system parallels the way that tabs, subtabs, and portlets are grouped and displayed within the portal.

Tabs and subtabs are accessed by clicking these navigation links:

- **Tabs** appear in the top row of this illustration and are always displayed. They represent the major functions or collections of data within the Patient Portal. In this illustration, the tabs are the upper row of navigation links. (Note that this row also includes the Search for a patient button.)

  My Secure Mail is where you land when you first log into the portal. It is a private and secure messaging center that patients and providers use to communicate with one another. It is not an ordinary email system. For more information, see page 13.

  Patient Summary is where you view a patient’s health status and personal information, including any tests or measurements that you have asked the patient to make and record at home. For more information, see page 33.

  Patient Search is where you search for and select the patient whose records you want to display on the Patient Summary tab. For more information, see page 67.

- **Subtabs** are used to organize the items within a tab and can only be accessed after you have selected their parent tab. When a tab is divided into two or more subtabs, the navigation links for these subtabs are displayed immediately below the tabs. When that is the case, the subtab that is currently being displayed is marked by a line below it, like Health Summary in the illustration above.

- **Portlets** are the areas on a tab or subtab where you view data or interact with the portal. Every tab or subtab contains at least one portlet, which usually looks something like this:
Tool Tips and Truncated Items

A tool tip is a yellow pop-up that appears when the mouse cursor is held motionless ("hovered") over an item in the Patient Portal’s user interface, such as a button, an icon, or a piece of information:

Another common use of tool tips is to display the full text of an item that has been truncated (cut short) due to lack of space. An ellipsis (...) indicates that an item has been truncated.

Tool tips are used in many places within the Patient Portal to provide you with extra information about an item and are well worth looking for as you use the Patient Portal.

Data Sources

When a portlet draws data from multiple sources, the source for each item is indicated by an icon. The icon that shows a person’s head and shoulders indicates that the patient entered the data:

The orange circle with an H in it indicates that the data comes from one of the portal’s data sources:
Chapter 2

My Secure Mail

Introduction

Clicking the My Secure Mail tab is how you access the Patient Portal’s private messaging system, which providers and patients use to communicate with one another. It does not include provider-to-provider messaging, which is done outside the Patient Portal.

In the rest of this chapter, you will learn the following:

- How your patient-portal mailbox is organized (page 14).
- How to read, print, reply to, and reassign the messages you receive (page 16).
- How to write and send new messages (page 19).
- How to organize and manage your messages (page 24).
- How to process registration and proxy requests (page 26).

Note: If you are permitted to see patient data in addition to My Secure Mail, you might see a link in the message header that says patient-name’s Health Summary:

If you click that link, the portal takes you to the Patient Summary tab’s Health Summary subtab (page 42). The patient named in the link is placed into context and the subtab displays the available data for that patient.
Mailbox Organization

Your secure mailbox is divided into three sections, the folder list in the upper-left corner, the Common Actions area below it, and the message list on the right. The folders organize your messages. To the greatest extent possible, each message is codified when it is sent, so it can be delivered to the appropriate folder in your mailbox. For all folders except Drafts, the number in parentheses next to the folder name is the number of unread messages it contains. In the case of Drafts, folder, it shows the total number of messages.

You open a folder by clicking it in the list. Here is what each folder is for:

- **My Assignments** is the default folder for messages that are assigned to you for a response.
- **All Items** contains everything that is assigned to your group of providers, including the messages concerned with patient-self-registration and proxy-assignment requests.
- **Drafts** contains the messages you are writing, but have not yet sent.
- **Completed Items** contains the messages that have reached the end of their respective workflows, with no additional responses allowed.
- **Archive** contains the messages you are saving for future reference.
- **Trash** is for messages that you plan to permanently delete, as described in “Manage Messages” on page 24.

The Common Actions links are used to send messages, as described in “Send New Messages” on page 19.

The message list includes these features:

- Messages you have not read are listed in boldface, which changes to regular type when you read the message by double-clicking its row in the list.
- Above the actual list of messages is a row of buttons that you click to perform various tasks. Clicking the blue-envelope button updates your mailbox. Clicking the pencil-and-paper button starts the process of sending a new message; for details, see page 19. To use the Mark as Read and Mark as Unread buttons, you must first select at least one message in the list by filling its checkbox and then click the button to change the status of all the selected messages. Other buttons might also be displayed, depending on which folder you are in. These are described in “Manage Messages” on page 24.
• An icon in the column to the right of the checkboxes indicates that the message includes an attachment, which can be displayed or saved by opening the message and then clicking the attachment link in the message’s header:

At first glance, the link for an attached file looks much like the patient links shown on page 13. Notice, however, the attachment link includes the full name of the file, including the extension (in this example, .docx) that identifies the type of file which is attached.

• An arrow in the column to the left of the Subject column tells you this message does not require a response because the workflow for that message is complete.

• The number in a black box to the right of the Subject tells you how many messages are combined in this item (that is to say, it tells you the length of this message chain).

• The icon to the right of the name in the From column indicates the group of users that the sender belongs to. In the example at the start of this list, all of them are providers. If you hold the mouse cursor motionless over this icon, an explanation of what it means is displayed in a pop-up tool tip.
Read, Print, Reply, and Assign

Read a Message

To read a message, open the folder it is in and then double-click its line in the message list. This opens a pop-up window that displays the current message and any previous messages in the message chain:

What you see when you open a message depends on the type of message it is. Each type has its own template.

If a chain of messages is being displayed, individual messages in the chain can be expanded and collapsed by clicking the + or - icon on the right edge of the message title.

The area in which each message is displayed in pre-set in length. If a message is too long to display in the available area, a scroll bar is displayed to the right of the text so you can see the entire message.

When a file is attached to a message, the file name is displayed as a link in the message’s header:

Click this link to display the attachment.
Note: In some messages, you might see a link in the header that says patient-name’s Health Summary:

If you click that link, the portal takes you to the Patient Summary tab (page 33), which has been populated with data for the patient who is named in the link.

**Print a Message**

To print a message, open it and then use your browser’s print function to create a hard copy. If the message is longer than the portal’s display window, you need to print the top of the message, scroll down to display the next part of the message, print it, and so on until you have printed the entire message.

**Reply to a Message**

Your ability to reply to a message from a patient depends on both the type of message you have received and where you are in the workflow for that message type. You always know when replies are permitted, because a Reply button is displayed in the open message’s toolbar:

Clicking this button adds a new message to the chain. If a pop-up list of activities is displayed, choose one so the correct message template and workflow is used:

Next, type your response and click the Send button. For more detailed instructions, see page 19.

Note: Several message types allow providers and patients to exchange an indefinite number of replies to one another. When this is the case for a message that you have selected or have opened, the Mark as Complete button is activated:

When you click this button, the conversation ends, making it impossible for either you or the patient to send any additional replies. Also, it enables you to archive or delete the message, as described in “Manage Messages” on page 24.

This button appears in both the My Secure Mail toolbar and in an open message. The toolbar location enables you to select multiple rows in the message list by filling their checkboxes before you mark all the selected messages as complete. If you click the button in an open message, only that one message is marked as complete.
Assign a Message to Another Provider

If you wish to assign this message to a member of your provider group, click the Assign To button:

The portal then displays a dialog box listing your provider group’s members:

Select the person who should respond to this message and then click the Assign button. The message is moved to this person’s My Assignments folder.

Note: When you assign a message to another person, the message list is not automatically updated. To manually refresh your message list, click the blue-envelope icon above the list:
Send New Messages

First you will learn how to send a standard message using the Send a Document message template (below), which serves as the general-correspondence template, then how appointments are scheduled, rescheduled, and cancelled using My Secure Mail (page 21).

As you write your message, you can save its current state to the Drafts folder by clicking the Save as Draft button. You can then either continue writing or close the message by clicking the X icon in the upper-right corner. In the latter case, when you’re ready to complete the message, double-click its line in the Drafts folder to reopen it.

Send a Standard Message

1. To begin the process, do one of the following:
   - Click Send a Document in the Common Actions list:
     
     | Common Actions |
     |----------------|
     | Send a Document |
     | Cancel/Reschedule an Appointment |
   
   - Click the Compose button and then click Send a Document in the pop-up list:
     
     | Common Actions |
     |----------------|
     | Send as Read |
     | Send a Document |
     | Cancel/Reschedule an Appointment |

2. With either method, the portal displays the Send a Document template:
Chapter 2 - My Secure Mail

**Note:** When a patient’s healthcare records are being displayed in the portal, the phrase **New Message** in the message’s header is replaced by the phrase **sender to recipient**, where **recipient** is the patient whose records are being displayed. How to change the recipient is described in the next step.

3. Click the **To** text box to display the **Select Recipient** dialog box:

   To search for the provider group or patient you are sending this message to, type part of the name in the text box at the top. When you locate the recipient you want, you can add it to the **Selected Recipients** box at the bottom by either double-clicking the name or by selecting it and then clicking the **Add** button:

   To remove a person or group from **Selected Recipients**, click the **X** icon next to the name.

   If you want to view the members of a group, click its name in the **Selected Recipients** list to display its members in a pop-up window. Click the pop-up’s **Close** button when you are done.
When all the recipients you want are in the Selected Recipients list, click the Done button to add them to your message.

4. Type the text of your message in the large text box:

![Send a Document](image)

5. If you want to attach a file, click the Attach File button and follow your browser’s on-screen instructions to locate and upload the file.

6. When your message is complete, click the Send button. Your message remains in its current folder, with an update in the Status column.

**Appointment Scheduling**

The workflow for scheduling appointments via My Secure Mail begins with the patient, who sends a message that includes a requested date and range of times for the appointment.

When you receive that message, you must review it and send a reply to the patient (for instructions, see “Read, Print, Reply, and Assign” on page 16). In your reply, you can either accept the appointment, specifying an exact time within the range the patient suggested, or you can suggest an alternative date and time. In the latter case, the patient must confirm the appointment before the workflow is completed.

The workflow is basically the same when the patient asks to reschedule or cancel an appointment.

If you need to reschedule or cancel the appointment after it has been confirmed, do this:

1. Begin the process by doing one of the following:
   - Click Cancel/Reschedule an Appointment in the Common Actions list:
• Click the Compose button and then click Cancel/Reschedule an Appointment:

2. My Secure Mail displays the Cancel/Reschedule an Appointment message template:

3. If a patient’s records are being displayed on the Patient Summary tab, the message is preaddressed to that patient. If that is not the correct patient or if the To box is empty, search for and select the correct patient using the procedure described on page 20.

4. Next, go to the Appointment On part of the message, where you search for and select the appointment you are changing.

   a. Specify the start date (Get all Appointments From) and the end date (To) for the time period during which the existing appointment occurs. Both of these text boxes work the same way: you can either type the date in mm/dd/yyyy format or you can select it from the pop-up calendar. Here is how the pop-up calendar works:

   b. Click the icon to the right of the text box to display the calendar:
c. Select the date. If you need to step backwards or forwards a month at a time, click the ◄ icon or the ► icon in the calendar’s header. To jump to a specific month and year, click the area near the ▼ icon to display this list:

![Calendar Screenshot](image)

d. Select the month and the year and then click the OK button. This returns you to the main calendar, where you can select the date.

e. After you have specified both dates, click the Search button to the right of the text boxes.

f. **My Secure Mail** displays the appointments that are scheduled for the recipient during the time period you specified:

![Appointment Screenshot](image)

g. Select the appointment you are changing.

5. Explain why the appointment is being changed in the message’s **Reason for Rescheduling** text box.

6. Click the Send button to transmit the message.
Manage Messages

Managing messages is done using the Move To button. Your ability to move messages and how you move them depends in part of the folder you have selected. If you are in a situation where moving messages is not permitted, the button is not displayed. The button might be displayed in the folder’s toolbar, or in an open message, or both. First you will learn how to move a message to a different folder, then how to permanently delete a message.

Move a Message

How you move a message depends on where the Move To button is displayed, in a folder (below) or in an open message (page 25).

Note: If the folder’s tool bar does not include the Move To button, you must open the message before you can move it.

In a Folder

To move one or more messages to a different folder, do this:

1. Select the folder where the messages are stored.

2. Fill the checkbox for every message you want to move to the destination folder:

   ![Checkbox List](image)

   You can select or unselect all the messages in the list using the checkbox in the column headings.

3. Click the Move To button to display a pop-up list of the available destinations:

   ![Pop-up List](image)

4. Select the folder you want to move the message to. (Descriptions of the folders are provided in “Mailbox Organization”.)

5. This confirmation message is displayed:

   ![Confirmation Message](image)

6. Click Continue to complete the move.
In an Open Message

To move an open message to a different folder, select the destination by clicking the appropriate button in the message’s toolbar:

![Move To All Items](image1)

The available destinations depend on which folder the message currently is in. After you click the button, this confirmation message is displayed:

![Move To All Items Folder Confirmation](image2)

Click Continue to complete the move.

Permanently Delete a Message

Before you can permanently delete a message, you must move it to the Trash folder, as described on page 24.

Once the message is in the Trash folder, you have these options:

- To delete selected messages, fill the checkbox next to each message you want to remove and then click the Empty Trash button:

  ![Empty Trash](image3)

- To delete all the messages, leave the checkboxes empty and then click the Empty Trash button.

In either case, this confirmation message is displayed:

![Emptying Trash Folder Confirmation](image4)

Click Continue to complete the deletion.
Registration and Proxy Requests

Registration requests involve patients who have asked for Patient Portal user accounts by submitting an electronic form that is accessed from the Sign In page of the portal’s patient application.

Proxy requests involve a patient and a second person (the proxy) who will be authorized to use the Patient Portal on behalf of that patient. Proxy requests can be initiated by either the patient or the proxy. Either party can also request that a proxy relationship be terminated. These activities all begin in the patient application’s Proxy Assignment function.

When one of these requests requires a healthcare provider’s approval, a Secure Mail message is sent to the provider group that is authorized to make these decisions. If you are a member of such a group, the message is delivered to your administrative inbox. This example shows the standard name for this folder, which is All Items:

The Subject of the message specifies the type of request it is. A Status of New indicates that the request requires a response from a provider. A status of Complete means the workflow for that message has reached its end.

Registration Requests

When you open a new registration request, the message provides you with the information required to verify the identity of the patient who submitted the request in your site’s medical records system:

If you find the patient, be sure to record the patient’s primary ID, which will be needed later.

Next, click the Reply button to display the options for responding to a registration request:
Confirm Registration is described below. Refuse Registration is described on page 28.

**Confirm Registration**

If you select Confirm Registration, the message expands so you can enter some additional information that is needed to complete the registration process:

At a minimum, you must type the patient’s primary ID in the Enter Patient Identifier text box. Click the Check Patient Identifier button to confirm that you entered the ID correctly. If you wish, you also can edit the boxes at the bottom of the message. For example, you might want to change Bill to William if the latter is how the patient is identified in the site’s medical records system.

When you are done, click the Send button.
Refuse Registration

If you choose Refuse Registration, the message expands so you can add an explanation to the Reason for Refusal text box:

After you have done this, click the Send button.
Proxy Requests and Terminations

As was stated on page 26, the process for establishing a proxy relationship begins in the patient application’s Proxy Assignment function. The person who initiates the proxy request can be either the patient or a second person who will help the patient use the Patient Portal. Regardless of who originates the request, Secure Mail messages are sent to both parties and the person who is being asked to participate must approve the request before a secure message is sent to your All Items admin folder for the required provider approval.

There are several types of proxy messages that you might see: a request from a patient to approve the proxy chosen by the patient, a request from a proxy to authorize that person to assist a particular patient, and a request to terminate a proxy relationship.

*Note:* The example being used here to show the proxy-request workflow was submitted by the person who wants to become the patient’s proxy. The contents of the messages for the other two request types vary somewhat from what’s shown here.

When you open a new proxy-related message, the message provides you with the information needed to identify the two people involved:

Click the *Reply* button to view the responses that are available to you:

These options are described in the following subsections. Your response to each of these options is sent to both the patient and the would-be proxy.
Approve Request

If you select Approve Request, the message expands to display additional information about both the patient and the proxy:

Click the Send button to approve the proxy relationship.
Deny Proxy Request

If you choose Deny Proxy Request, the message expands to display this data-entry form:

In the **Reason** text box, explain why you are rejecting the request. If you wish, you can enter additional information about the would-be proxy in the lower part of the form.

When you’re done, click the **Send** button.
Request Patient Approval

If you select Request Patient Approval, the message expands to display this data-entry form:

In the **Reason** text box, explain why you’re seeking the patient’s approval. The rest of the form can be used to provide more information that helps to identify the person who wishes to be the patient’s proxy. When you’re done, click the **Send** button.
Chapter 3

Patient Summary

This explanation of the Patient Portal’s Patient Summary tab contains these topics:

- How to retrieve a patient’s healthcare records into the Patient Portal (below).
- A summary of how the Patient Summary is organized and how to navigate within it (page 34).
- An explanation of what’s in the patient banner. This includes instructions for the two functions that are located in the banner, the ability to associate a patient with a provider group and to Download Patient Data (page 35).
- Instructions for the capabilities that are shared by the portlets which display data in the Patient Summary (page 38).
- A detailed look at the contents of each subtab in the Patient Summary. These are Health Summary (page 42), Lab Results (page 49) Patient’s Care Plan & Health Tracking (page 51), Demographics (page 54), Results Delivery (page 57), and Disease Management (page 60).

Retrieve a Patient’s Records

The Patient Summary tab provides you with medical and personal information about a specific patient. There are two ways you can retrieve a patient’s data into the Patient Summary from the navigation bar:

- Click the Search for a patient button in the upper-right corner, which takes you to the Patient Search tab (page 67).
- Click the Patient Search tab itself.

If a message that you receive includes a link that says patient-name’s Health Summary in the header, you also can retrieve patient data by clicking that link in an open message on the My Secure Mail tab (page 13):
Organization

Regardless of the method used to specify the patient (see previous section), the portal takes you immediately to the **Patient Summary** tab, which is divided into these subtabs:

- The **Health Summary** subtab (page 42) is an overview of the current patient’s medical status.
- The **Lab Results** subtab (page 49) provides a read-only view of the findings from the current patient’s laboratory tests.
- The **Patient’s Care Plan and Health Tracking** subtab (page 51) is where you see (a) the disease-profile recommendations you have made to the patient, (b) the results of any measurements (for example, blood pressure) that the patient has made at home and then entered into the patient’s side of the Patient Portal, and (c) the data a patient has posted to the portal from a fitness-tracking device, such as a Fitbit, that is compatible with the portal.
- The **Demographics** subtab (page 54) displays the active patient’s personal information.
- The **Results Delivery** subtab (page 57) is where you specify which laboratory results are released to the patient for viewing in the Patient Portal and which are held back so you can discuss them in person with the patient.

*Note:* At some sites, **Results Delivery** is not displayed at all. Whether it is displayed and much of its operation when it is visible is controlled by portal-wide settings that can only be made by authorized system administrators, not by individual providers. These include which results are placed under a system-wide embargo and can never be displayed in the patient’s side of the Patient Portal, which lab results have temporary patient-access restrictions placed on them, and how long you have to review this second group of results before they are automatically released to the patient.

- The **Disease Management** subtab (page 60) is where you can assign a disease profile to the current patient and customize its contents specifically for that patient.

*Note:* Although it is not, strictly speaking, a part of the **Patient Summary** tab, instructions for assigning a patient to a provider group are also included in this chapter (page 35).

To display a subtab, click its link. The line below **Health Summary** in the illustration above indicates that it is the subtab currently being displayed. The banner that appears below the subtab links tells you which patient’s records are being displayed in the **Patient Summary** tab.
Patient Banner

The patient banner is displayed just below the navigation tabs on every screen in the Patient Summary:

The three items in the left and center portion of the banner identify the patient whose healthcare records are currently being displayed in the Patient Summary. This information includes the patient’s name, date of birth, age, gender and medical records number.

The button to the right of the MRN is used to add or remove this patient from one or more provider groups (also referred to as care teams). Instructions for doing this are provided below.

The button on the far right of the banner is used to Download Patient Data, as described on page 36.

Provider Groups

Within the Patient Portal, system administrators can create provider groups and assign people who are authorized users of the portal’s provider application to any of those groups.

After a provider group has been created, you can create an association between the patient whose data is currently being displayed in the Patient Portal and any provider group that you are a member of. This enables the patient to use the portal’s secure messaging system to share information with all the members of the group. Depending on how your portal is configured, this might also include such tasks as requesting an appointment or requesting a prescription renewal, which are done via secure mail. (For more on secure mail, see page 13.)

To associate the current patient to a provider group or remove that association, do this:

1. If the correct patient’s records are already being displayed, you can skip this step. Otherwise, follow the instructions on page 67 to locate the patient and retrieve his or her records into the Patient Portal.

2. In the patient banner, click the second button from the right:

3. The portal displays a list of the provider groups that have been defined in the Patient Portal:

   Groups that are dimmed are the groups that every patient is automatically connected with as soon as the patient is registered as a portal user. These connections cannot be modified.

4. To assign a patient to a provider group, fill the group’s checkbox. To separate a patient from a group, clear its checkbox.

5. Click the Done button to activate your changes for this patient.
Download Patient Data

The Patient Portal includes the ability to download all or some of a patient’s healthcare records in standard formats, so you can save a copy for yourself or share it with other providers.

These are the available formats:

- **PDF**: This option creates a Portable Document Format file. These files can reproduce how your data is formatted and any pictures that might be included. PDF files can be viewed on any computer that has the free Adobe Reader program installed. There are numerous other software programs that can open and display PDF files.

- **Text**: This option creates a plain-text file. That is a file which contains letters and numbers, but no formatting or pictures. Windows Notepad is one of many programs that can read text files.

To download the current patient’s healthcare data, do this:

1. Click the Download Patient Data button on the right side of the patient banner:

   ![Download Patient Data button](image)

2. Select the amount of data you want to download and the delivery format (PDF or text file) from the drop-down list:

   ![Download Select Patient Data](image)

   If you choose the SELECT option, go to the next step. If you choose one of the ALL options, the download begins immediately and you jump to step 8.

3. If you chose **Download SELECT patient data**, the portal displays this selection form:

   ![Download Select Patient Data](image)

   4. In the TimeFrame part of the dialog box, click the button that specifies the time period for the data. If you click Custom, controls for choosing your own date range are displayed below the buttons:
To set the From and Through dates, you can either type the dates in *mm/dd/yyyy* format in the text boxes or click the calendar icon and then select that date from a pop-up calendar.

5. Immediately below the **TimeFrame** buttons are the **Select Patient Data** checkboxes:

If you click the checkbox next to **Select Patient Data**, all the checkboxes are selected. This is useful if you’ve changed your mind since step 2 and now want to download all the data. You can also use it to preselect all the checkboxes and then you can clear the checkboxes for the data types you do *not* want to download.

6. Next, use the **Download File Format** radio buttons to specify the type of file you want to create, if you’ve changed your mind since step 2.

7. Click the **Download** button to generate the file.

8. What happens next depends on the file format you chose for your data and how your computer is configured, but these are two common possibilities:

   • If you are downloading a **Text** file, your browser displays a dialog box that enables you to view the file or save it to disk.

   • If you are downloading a **PDF** file, the file is displayed in your default PDF file viewer (which often will be Adobe Reader). You can use the viewer’s **File** menu to save your download to disk.
Portlets: Shared Capabilities

The portlets on the Patient Summary tab have several capabilities in common. For convenience’s sake, they are described below, before the subtab descriptions:

- Data-paging and data-refresh controls (below)
- Data-source indicators (second section below)
- Educational materials (page 39)
- The ability to print a portlet’s data (page 40)
- The ability to personalize a portlet (page 40)

Page and Refresh Controls

Each portlet in the Patient Portal contains one or more pages of data. These controls are used to navigate through these data pages and to refresh (update) the data being displayed:

From left to right, here is what each of the six controls does:

1. Click this button to jump to the first page of data.
2. Click this button to step to the previous page of data.
3. The Page x of y control tells you which page is currently being displayed and how many pages there are. You can jump to a specific page by typing its number in the text box and then pressing Enter.
4. Click this button to step to the next page of data.
5. Click this button to jump to the last page of data.
6. Click this button to manually refresh the data in the portlet. This ensures that the contents are completely up-to-date.

When multiple pages of data are being displayed in the portlet, this message tells you which items are on the current page and how many items there are in total. The text changes to No data to display when the portlet is empty.

Data Sources

When a portlet draws data from multiple sources, the source for each item is indicated by an icon. In the pictures below, the icon shown on the left indicates that the patient entered the data, the icon on the right indicates that the data comes from your site’s database:
Educational Materials

If the organization that sponsors the Patient Portal has licensed the appropriate third-party software, the Patient Portal can provide you with educational information about many of the patient’s medications, problems, and laboratory tests.

To indicate this information might be available, a red information icon is displayed to the left of the item’s name:

When you click either the icon or the item’s name and educational information is available, a Details dialog box is displayed for the item you clicked. The following example is for Alcohol Dependence:

To expand a section so you can read what it says, click its heading.

When you have finished reading the education information in the Details dialog box, click the X icon in the upper-right corner to close it.
Print the Data

The ability to print the contents of a portlet is indicated by a printer icon at the right end of the portlet’s header:

When you click the icon, the Patient Portal generates a temporary file and displays both it and your web browser’s printer-selection dialog box in a new browser window:

If you want to print the file, select the printer you want to use and then click the OK button.

If you want to save the file to your hard drive, your computer might need to have a print-to-file printer driver installed. Adobe PDF, which comes with the free Adobe Reader, is the most widely used of these. Select that printer, click the OK button, and then specify where you want the file to be saved.

Personalize the Portlets

The Patient Portal gives you some control over how your patient’s healthcare information is displayed by enabling you to personalize the portlets. There are several ways you might be able to do this:

1. You can choose which columns of data you want to display, omitting those that are not important to you. This is the most common option.

2. You can sort the data using the contents of a particular column within the portlet. For example, you can sort it by date with the newest entry at the top. This is a less common option and might only be available for some columns in the portlet.
Note: Which of these options are available for a particular portlet depends on several factors, including how the data is structured by the source from which it comes.

To personalize a portlet, do this:

1. If you want to sort or group the data, hold the mouse cursor motionless over the heading of the column that will control the sort.
   
   If you want to change which columns are displayed, hold the mouse cursor motionless over any column heading.
   
   In either case, the column heading now displays a ▼ icon on its right-hand edge:

2. Click the ▼ icon to display a pop-up list of the options that are available to you. Sometimes the list of options you see will depend on not just the portlet, but which column you are looking at. This example shows two sorting options and the column-display option:

3. Choose the type of personalization you want to do.

4. What happens next depends on the option you choose:
   
   • If you click Sort Ascending or Sort Descending, the portlet is immediately personalized and the list is closed. See the note at the end of these instructions for more about the two sorting options.
   
   • If you want to select which columns are displayed in the portlet, hold the mouse cursor motionless over the Columns option until the checklist of columns is displayed, then slide the mouse cursor over the checklist:

      To display a column, fill its checkbox. To make the column invisible, clear its checkbox. If a column is mandatory, that option is inactive and displayed in gray. Each time you make a selection, the change occurs immediately so you can see the result, but the checklist remains on screen until you click somewhere outside of the checklist to close it.

   Note: When a column can be used to sort the data in the portlet, you have two options: you can use the procedure described above or you can just click the column heading.
   
   With either method, after the sort has taken place, the column heading now includes an ▲ icon to indicate an ascending sort (A to Z, oldest to newest) or a ▼ icon to indicate a descending sort.
   
   To reverse the direction of the sort, click the column heading again.
Health Summary Subtab

The Health Summary subtab only displays data after you have either used the “Patient Search” tab to retrieve a patient’s records or clicked the “patient name’s Health Summary” link in a secure message. It provides a read-only, at-a-glance overview of the current patient’s medical status.

The Health Summary subtab contains these portlets:

- **Medications** displays both the medications in the EMR database and those entered by the patient. For more information, see page 43.
- **Medical Visits** lists the encounters that are in the EMR database. For more information, see page 43.
- **Social History** displays the patient’s behavioral information (example: smoking). For more information, see page 43.
- **Hospitalizations & Emergency Room Visits** list the hospital and ER visits that are in the EMR database. For more information, see page 44.
- **Procedures** lists the surgical and other procedures that (a) are in the EMR database and (b) have been manually entered by the patient. For more information, see page 44.
- **Allergies** shows both those that are in the EMR database and those entered by the patient. For more information, see page 44.
- **Vital Signs** displays the most recently recorded values for these measurements. For more information, see page 45.
- **Immunizations** lists both those that are in the EMR database and those entered by the patient. For more information, see page 45.
- **Problems** lists both the health problems that are in the EMR database and those entered by the patient. For more information, see page 46.
- **Provider Reports and Documents** displays the results for imaging and other studies that are in the EMR database. It also includes C-CDAs. For more information, see page 46.
- **Family History** displays patient-entered family-health information. For more information, see page 47.
- **Documents** allows you to view the documents the patient has uploaded to the portal and those you have sent to the patient. For more information, see page 48.
Medications displays the medications that are in the EMR database and those that the patient has entered into the corresponding portlet on the patient’s side of the portal. These can include both over-the-counter and prescription drugs.

Medical Visits lists the patient’s encounters for a period of up to three years before today. To set the time period for the encounters that will be displayed, choose it from the Show drop-down list.

Social History displays the behavioral information that the patient has entered on the portal’s patient application or that is in the EMR database.
Chapter 3 - Patient Summary

Hospitalizations & Emergency Room Visits

Hospitalizations & Emergency Room Visits lists the hospital and ER visits that are in the EMR database. The information provided includes when the encounter took place, where it was, why it happened, and who the admitting physician was.

Procedures

Procedures lists the surgical and other procedures that (a) are in the EMR database and (b) have been manually entered by the patient. For each procedure, it lists who, what, where, and when, with comments and a data-source icon.

Allergies

Allergies gets its information from two sources: the enterprise’s clinical-charting database and the data the patient has entered into the corresponding portlet on the patient’s side of the portal. Severe reactions are highlighted in red and have a warning icon in the Substance column.
Vital Signs

Vital Signs displays the patient’s Height, Weight, and Blood Pressure, with the date these values were entered by the patient into the Patient Portal. If the patient has entered multiple values for any of these measurements, only the most recent one is displayed here. Vital Signs also uses this data to calculate the patient’s BMI (body mass index):

Because the BMI is calculated from the patient’s Height and Weight, if the patient has not entered either of those values into the portal, Vital Signs does not display the BMI.

Immunizations

Immunizations gets its information from two sources: the EMR database and the data the patient has entered in the portal’s patient application. For each vaccine, Immunizations shows its name, the administration date or the date it was offered and refused, the status of the immunization, any comments about the immunization or the reason it was refused, and the source of this data.
Problems

Problems lists the health problems that are in the EMR database and that the patient has entered in the portal’s patient application.

Provider Reports and Documents

Provider Reports and Documents lists and displays the results of the reports that are in the EMR database. It also includes C-CDAs.

Initially, the portlet shows the results that were reported during the past week. To change this time period, make a new selection from the Show reports within drop-down list.

To view a report, double-click its row in the list or click the link in the Report column. The portlet opens the report viewer, which contains the report and any images which accompany it:
The report and any images are each displayed on its own tab. Click the tab to view the item. When you are done, click the Close button to exit the viewer.

**Family History**

Family History shows the information that the patient has provided regarding the major and chronic health problems experienced by that person’s family members.
Documents

Documents allows you to view the documents that the patient has uploaded to the Patient Portal and the documents you have sent to the patient using the Patient Portal. It also contains copies of the forms that the patient submitted on the Forms tab, if that is enabled at your site. To view a document, do this:

1. Click its link in the Document Name column. You might see a dialog box that asks what program you want to use to open the file. If this happens, click the OK button to accept the program your browser suggests or choose a different program before you click OK.

2. The portal opens the document in the appropriate viewer for this type of file:

3. When you have finished reviewing the document, close its window.
Lab Results

The Lab Results subtab contains only the Lab Results portlet, which provides a read-only look at the results of the current patient’s laboratory tests:

![Lab Results Portlet Example]

The toolbar below the patient’s name and ID is where you specify (a) the dates for which results are displayed and (b) whether all the results are displayed or only the abnormal and critical results. Instructions for doing this are in “Filtering the Results” on page 50.

How Lab Results is Organized

The total number of data records that have been retrieved is displayed to the right of the toolbar buttons, next to a stop-light icon that indicates the status of the data retrieval. The results are downloaded from the database in groups of 50, beginning with the most recent results in the time period you specified using the tabs. If the results you want to see are not in the first group, click the Load More button in the lower-right corner to download the next group of results. You can repeat this until all the results are displayed.

The blue heading above each set of results gives you the date and time the tests were administered and the name of the test panel to which the results belong. Each panel can be collapsed or expanded by clicking the minus or plus icon to the left of the date.

For each result in the panel, the information provided will include some or all of the following: the Collection Date/Time, the name of the Test, the Result of the test, the Unit of measurement for the test, a Flag that specifies how your result compares to the standards established by the organization that hosts the Patient Portal, the Reference Range used to determine which flag (if any) is displayed, the name of the test Panel, and the Source of the data.

If there is a red information icon next to the test’s name, educational materials concerning this test might be available for the patient to view in the portal’s patient application.

If a Result is displayed in red, its value is outside the Reference Range that has been established by your organization. The items in the Flags column are explained on page 50. The icons used to identify the source of this data are explained on page 38.
Filtering the Results

You control the time period for which results are displayed and the severity of the displayed results by selecting the buttons near the top of Lab Results:

<table>
<thead>
<tr>
<th>Most Recent Visit</th>
<th>6 Months</th>
<th>1 Year</th>
<th>2 Years</th>
<th>Custom</th>
<th>All Results</th>
<th>Abnormal/Critical</th>
</tr>
</thead>
</table>

The buttons are configurable, so the options you see at your site might differ from these. They are divided into two groups that are separated by a vertical line.

In the first group, this example shows four buttons that are preset to display results for the patient’s Most Recent Visit, the past 6 Months, the past 1 Year, and the past 2 Years. The fifth tab is Custom, which enables you to specify any time period that you want. It works like this:

1. Click the Custom button to display the text boxes for the From Date and the To Date:

2. You can either type the dates into the text boxes using the MM/dd/yyyy format or you can click the calendar icon to select a date from the pop-up calendar.

3. After both dates have been entered, click the Go button.

4. The label on the Custom button changes to show the dates you specified:

   ![Custom Date Range]

   **01 Jul 2014 - 01 Nov 2014**

The tab you select from the second group enables you to display All Results that fall within the selected time period or only those that are Abnormal/Critical.

Data Flags

The Flag column in Lab Results sometimes displays a symbol that explains why a particular result is displayed in red, which indicates that the result might be abnormal or critical because it is outside the Reference Range:

<table>
<thead>
<tr>
<th>Collection DateTime</th>
<th>Test</th>
<th>Result</th>
<th>Unit</th>
<th>Flag</th>
<th>Reference Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 Jul 2014 07:36 AM</td>
<td>Glucose Septim Ctr</td>
<td>318</td>
<td>mg/dL</td>
<td>H</td>
<td>70 - 99 mg/dL</td>
</tr>
<tr>
<td>19 Jul 2014 06:36 AM</td>
<td>Comprehensive metabolic 2000 panel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19 Jul 2014 06:36 AM</td>
<td>Albumin/Total</td>
<td>1.80</td>
<td>L</td>
<td>1.2-3</td>
<td></td>
</tr>
<tr>
<td>19 Jul 2014 06:36 AM</td>
<td>Albumin Septic Ctr</td>
<td>4.0</td>
<td>g/dL</td>
<td>-</td>
<td>3.5 - 5.0 g/dL</td>
</tr>
</tbody>
</table>

If you hover the mouse cursor over the symbol in the Flag column, an explanation of what it means is displayed in a tool tip.
Patient’s Care Plan and Health Tracking Subtab

The Patient’s Care Plan and Health Tracking subtab is where you monitor selected aspects of the patient’s at-home healthcare activities. It contains these portlets:

- Care Plan (below) shows the disease-management profiles you have assigned to the patient.
- Patient's Health Tracking (page 52) shows you the various measurements (such as blood pressure and weight) that the patient made at home and recorded in the portal’s patient application.
- My Health Dashboard (page 53) displays data collected by patient who is using a fitness-tracking device. The device must be compatible with the Patient Portal and the patient must authorize the device’s manufacturer to share this data with the portal before it can be displayed.

Care Plan

Care Plan is a read-only portlet that shows you the disease profiles and the specific items within those profiles that you have assigned to the current patient, exactly as the patient sees them:

Note: Assigning profile items to a patient is done using Manage Disease Profile on the Patient Summary tab’s Disease Management subtab (page 60).

Within the portlet, the headings are the disease profiles (in this example, Diabetic Profile). When a profile is expanded, you see only the items within the profile that you have assigned to the patient. Each item consists of a health need and a health goal.

To expand and collapse a profile, click the icon to the left of the profile’s name in the Type column.
Patient’s Health Tracking

Patient’s Health Tracking displays the health data that the patient has measured at home and then entered into the corresponding portlet on the patient’s side of the portal. This portlet is divided into two halves.

The upper half displays the data that has been entered by the current patient:

You can control how much data is displayed by selecting an option from the Show results within drop-down list and by filling or clearing the Show columns with data only checkbox. Out-of-range values are highlighted in red.

The lower half of the portlet is where you can display trending graphs:

The trending graphs that are available for this patient are listed under Select desired graphs to display. Which graphs are available varies according to the types of data being recorded in Patient’s Health Tracking (above). To display a graph, fill its checkbox. Clear the checkbox to remove the graph from the display.

Some trending graphs, such as the one shown here, include controls for specifying what data and how much data should be included in the graph.
My Health Dashboard

My Health Dashboard is a read-only portlet that displays data collected by a patient who is using a fitness-tracking device.

The device must be compatible with the Patient Portal and the patient must authorize the device’s manufacturer to share this data with the portal before it can be displayed.

If the patient has more than one device connected to the portal, use the tabs at the top of the portlet to select the device for which data will be displayed. In this example, Fitbit is chosen.

Under Daily Activity & Sleep, select the type of data you want to see. To the right of those buttons, select the time period to be covered. In this example, the graph of the results shows a week’s worth of Calories Burned data.

Below the graph, you see the dates on which the displayed data was collected by the patient’s device. To step back one block of time, click the button to the left of the dates. To step forward one block of time, click the button to the right of the dates.
Demographics Subtab

The Demographics subtab displays the active patient’s personal information in these portlets:

- **Personal Information** contains information that can be used to identify the patient. For more information, see page 55.
- **Contact Information** contains the patient’s addresses and phone numbers. For more information, see page 55.
- **Emergency Contact Information** tells you whom you should contact if the patient has a medical emergency. For more information, see page 55.
- **Patient Information** contains treatment-related information, such as the patient’s Medical Record Number (MRN). For more information, see page 56.
- **Medical Contacts** contains contact information for the patient’s healthcare providers. For more information, see page 56.
- **Health Insurance Information** contains information about the patient’s insurance coverage. For more information, see page 56.

Portlets can be individually collapsed or expanded by clicking the ▲ or ▼ icon next to the portlet’s name. To expand or collapse all of them simultaneously, click the Expand/Collapse All button in the upper-left corner of the screen:
Personal Information

Personal Information contains information that can help you identify and serve the patient. This information was either (a) entered into the portal by the patient or (b) contained in the ADT message that was ingested to create the patient’s user account. This portlet includes a considerable amount of protected personal information. In this example, the image in the upper-right corner is a placeholder which indicates that the patient has not uploaded a picture of himself or herself to the Patient Portal.

Contact Information

Contact Information contains the patient’s addresses and phone numbers. This information was either (a) entered into the portal by the patient or (b) contained in the ADT message that was ingested to create the patient’s user account.

Emergency Contact Information

Emergency Contact Information lists the people whom the patient wants you to contact in the event of an emergency.
Patient Information

Patient Information contains healthcare-related information, some of which comes from the patient and some of which comes from your facility’s patient database.

Medical Contacts

Medical Contacts lists the providers whom the patient has entered into the portal.

Health Insurance Information

Health Insurance Information displays coverage information that the patient has entered into the portal.
Results Delivery Subtab

The Results Delivery subtab contains only Results Delivery, which is where authorized physicians can review sensitive clinical information (as has been determined by your organization) and then decide which results the patient will be able to view in the portal’s patient application.

However, the ability to do this is governed by several system-wide configuration options that determine how this portlet works at your site. These are explained below in “Configuring the Portlet”, below.

The patient whose results you see in Results Delivery is the one whose name and personal information is currently being displayed in the portal’s patient banner. To change the current patient, use Search for a Patient (page 67).

Configuring the Portlet

How Results Delivery behaves depends on how it is configured at your site. This is done by a system administrator working under the direction of senior clinical management. These are the available options:

- The administrator can specify those results that will never be displayed to the patient by the Patient Portal. The physician must always discuss these results directly with the patient.

- After that, there are several options for controlling how the remaining results are delivered to the patient via the Patient Portal:
  - All the results can be sent directly to the patient as soon as they become available. This option eliminates your ability to choose which results the patient sees.
  
    Note: The Results Delivery subtab is not displayed when this option is active.

  - All the results can be held in Results Delivery for a specified number of hours before they are delivered to the patient. This gives you an opportunity to hold back specific test results, but if you fail to review the results within the specified time period, they are automatically released to the patient.

  - No result is delivered to the patient without your specific authorization. They are all blocked until you say otherwise.

If you have any questions about how Results Delivery is configured at your site, please contact your supervisor or the Patient Portal’s system administrator.
Using the Portlet

Results Delivery is a two-part portlet.

The section on the right side of the portlet, Released to patient, is for information only. It shows the results that have recently been released to the patient:

The results review takes place in the section on the left, Results Pending Decision:

Initially, all you see are the names and collection dates of the various test panels. Individual panels can be expanded or collapsed by clicking the + or - icon in the left-most column. All the panels can be simultaneous expanded or collapsed by clicking the blue icon at the top of that column. The icon in the Org column indicates that these are lab results.

When you expand a panel, the portlet displays the panel’s individual tests and their results:

Out-of-range results are marked by an icon in the Flag column. The Collection Date specified for the panel also applies to the individual tests.

To release lab results so they can be viewed by the patient in the Patient Portal, do this:

1. Review the lab results and decide which ones you wish to release to the current patient.

2. For every lab result you want to release, fill its checkbox. (The check boxes are disabled for lab results that have been globally excluded from electronic delivery to the patient.) If you fill a panel’s checkbox, all the results it contains are selected for release, unless you clear an individual checkbox:
3. When you have selected all of the lab results you want the patient to see, click the Release to patient button.

4. The results you have released are then sent to the portal’s patient application. For you, they are moved to the Released to patient list on the right side of Results Delivery:
Disease Management Subtab

The Disease Management subtab contains only Manage Disease Profile:

This is where you can assign all or part of a disease profile to the patient who is currently displayed in the patient banner. You can customize any profile to meet this patient’s specific healthcare needs and even create new, patient-specific disease profiles. (The master copies of the standard disease profiles that are available to all the providers at your site are created and maintained by your site’s system administrators under the direction of senior clinical management.)

Each entry in the Disease Profile Name column is a disease profile. Clicking the arrow icon on the left edge of the Disease Profile Name expands or collapses the list of items within that disease profile. To expand or collapse all the disease profiles simultaneously, click the Expand/Collapse button in the portlet’s toolbar.

Each item within a profile consists of a Patient Need and a Health Goal. If there is a checkmark icon in the Assigned to Patient column, that item can be viewed by the current patient in the portal’s patient application. You can also view these assignments using Care Plan (page 51) on the Patient Summary tab’s Patient's Care Plan and Health Tracking subtab.

In the following subsections, you will learn how to assign an existing profile item to the current patient (below), how to manage disease profiles (page 61), and how to manage items within a profile (page 63).

Assign/Unassign a Profile Item to the Patient

Do this to assign or unassign action items in an existing disease profile to or from the current patient:

1. If necessary, expand the disease profile.
2. Select the item by clicking anywhere in its row.
3. The portlet displays this data-entry form:

   ![Data-entry form]

4. Fill the Assign To Patient checkbox to assign the action item to the current patient. Clear the checkbox to remove the item from the disease profile seen by the patient.
5. Repeat as necessary for the remaining items in the disease profile.
6. Click the Save button to record your changes.
Manage Disease Profiles

In the following subsections, you will learn how to add a profile to Manage Disease Profile (below), how to edit a disease profile (page 62), and how to delete a disease profile (page 62).

Note: The changes you make here are specific to the current patient and do not affect any system-wide disease profiles that have been defined at your site.

Add a Disease Profile

To add a disease profile to the current patient’s list of profiles, do this:

1. Click the Add button in the portlet’s toolbar:

2. Choose New Disease Profile from the drop-down menu:

3. The portlet displays the New Disease Profile dialog box:

4. Select one of the Disease profile create options radio buttons.
   - If you choose Select from enterprise level entries, select one of the predefined disease profiles from the drop-down list:

   • If you choose Create new disease profile, the dialog box looks like this:
Type the name of your new, patient-specific disease profile in the **Disease Profile** text box.

5. Click the **Save** button to add this profile to the current patient’s profile list. If this is a new disease profile, the profile is empty. Instructions for adding action items to it are on page 63.

### Edit a Disease Profile

The only editable item a disease profile has is its name:

1. Select the profile you wish to edit.

2. Click the **Edit** button in the portlet’s toolbar:

3. The portlet displays the **Edit Disease Profile** dialog box:

4. Make the necessary changes in the **Disease Profile** text box and then click the **Save** button.

### Delete a Disease Profile

To remove a disease profile from the current patient’s profile list, do this:

1. Select the profile you wish to delete and click the **Delete** button in the portlet’s toolbar:

2. The portlet displays this warning message:

3. Click the **Yes** button to complete the deletion.
Manage Profile Items

As a provider, you can customize any disease profile to meet the specific healthcare needs of the current patient. In this section, you will learn how to add a new Patient Need/Health Goal action item to a disease profile (below), how to edit an item (page 64), and how to delete it (page 65).

Add a New Item to a Disease Profile

To add a new action item to a disease profile, do this:

1. Click the Add button in the portlet’s toolbar:

2. Choose New Profile Item from the drop-down list:

3. The portlet displays the New Profile Item dialog box:

   Required items are marked with a red asterisk (*)

4. Use the Select Disease profile drop-down list to specify the disease profile to which the new action item belongs:
5. Fill in the Patient Need and Health Goal text boxes:

![New Profile Item](image)

6. If you want this action item to be immediately visible to the current patient, fill the Assign To Patient checkbox.

7. Click the Save button to add this new item to the disease profile you selected.

**Edit a Disease Profile Item**

To edit an action item in a disease profile, do this:

1. Select the item by clicking anywhere in its row.

2. The portlet displays this data entry form:

![Manage Disease Profile](image)

3. Make the necessary changes.

4. If you want this item to be immediately visible to the current patient, fill the Assign to Patient checkbox.

5. Click the Save button to record your changes.
Delete a Disease Profile Item

To remove an action item from a disease profile, do this:

1. Select the item by clicking anywhere in its row.

2. The portlet displays this data entry form:

```
Manage Disease Profile
<table>
<thead>
<tr>
<th>Add</th>
<th>Edit</th>
<th>Delete</th>
<th>Expand/Collapse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disease Profile Name</td>
<td>Assigned To Patient</td>
<td>Patient Need</td>
<td>Health Goal</td>
</tr>
<tr>
<td>Diabetes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign To Patient</td>
<td>Foot Exam</td>
<td>Happy Feet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Happy Feet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Happy Feet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Happy Feet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Happy Feet</td>
<td></td>
</tr>
</tbody>
</table>
```

3. Click the Delete button.

Caution: The deletion takes place immediately, without a confirmation message.
Chapter 4

Patient Search

Getting Started

The Patient Search tab contains only Search for a Patient:

This portlet is used to specify the patient whose records you wish to retrieve into the Patient Summary tab (page 33).

Note: This patient must be a registered user of the Patient Portal.

You can begin your search in either of these ways:

- By clicking the Patient Search tab.
- By clicking the Search for a patient button that is located to the right of the tabs:

The portlet contains two search options:

- Search By Name and other personal information, which is the default option (page 68).
- Search By ID (page 68).

Choose the method you want by clicking its radio button in the upper-left corner of Search for a Patient.
Search By Name

To search for a patient using that person’s name or other personal information, do this:

1. Click the Search By Name radio button.
2. Enter as much of the requested information as you can using the text boxes and the drop-down list. At a minimum, you must supply either the person’s Last Name, First Name, Date of Birth, or Zip Code. The two names can be partial names. Specifying the patient’s Gender is particularly helpful when dealing with names like “Pat” that are not gender-specific.
3. Click the Search button.
4. Go to “Search Results” on page 69 for additional instructions.

Search By ID

To search for a patient using the person’s ID, do this:

1. Click the Search By ID radio button.
2. Type the complete ID in the Patient’s ID Number text box.
3. Click the Search button.
4. Go to “Search Results” on page 69 for additional instructions.
Search Results

Regardless of whether your search used the patient’s name or the patient’s ID, the patients who meet your search criteria are listed in the lower portion of Search for a Patient:

Use the displayed information to identify the correct patient.

To retrieve that person’s medical records, you can either double-click the row for that patient or you can select the patient and then click the Set Selected Patient in Context button in the lower-right corner.

The portal loads the healthcare data for that patient and takes you to the Patient Summary tab (page 33) so you can review this information.
Index

A
actions
   My Secure Mail, 14
Allergies portlet
description, 44
appointments
   using My Secure Mail to schedule,
   reschedule, and cancel, 21
attachments
   My Secure Mail, 16

C
Care Plan portlet
description, 51
components
   See portlets
configurability
   Patient Portal, 7
Contact Information portlet
description, 55
controls
   data page, 38
   data refresh, 38

D
data sources
   icons, 38
Demographics subtab
description, 54
Disease Management subtab
description, 60
Documents portlet
description, 48
download patient data
   how to, 36

E
educational materials
   accessing, 39
ellipsis
   indicates truncated items, 11
Emergency Contact Information portlet
description, 55

F
Family History portlet
description, 47
folders
   My Secure Mail, 14

H
Health Insurance Information portlet
description, 56
Health Summary subtab
   portlets, 42
Hospitalizations & Emergency Room Visits
   portlet
description, 44

I
Immunizations portlet
description, 45

M
Manage Disease Profile portlet
   add a profile, 61
   add an item to a profile, 63
   assign/unassign a profile item to the patient,
   delete an item from a profile, 65
   description, 60
   edit a profile, 62
   edit an item in a profile, 64
Index

managing profile items, 63
managing profiles, 61
Medical Contacts portlet
description, 56
Medical Visits portlet
description, 43
Medications portlet
description, 43
message list
My Secure Mail, 14
messages
deleting, 25
moving, 24
printing, 17
reading, 16
reassigning, 18
replying to, 17
sending, 19
messages, managing, 24
My Health Dashboard portlet
instruction, 53
My Secure Mail portlet
appointments, 21
attachments, 16
common actions, 14
deleting messages, 25
description, 13
folders, 14
mailbox organization, 14
managing messages, 24
message list, 14
moving messages, 24
patient link, 17
print messages, 17
read messages, 16
reassigning messages, 18
reply to a message, 17
sending messages, 19
My Secure Mail tab
description, 13

N

navigation
Patient Portal, 10

O
organization
My Secure Mail mailbox, 14

P
pages, user-interface
See subtabs
patient
add a patient to or remove from a provider
group, 35
patient banner
description, 35
patient data
how to download, 36
Patient Information portlet
description, 56
patient link
My Secure Mail, 17
Patient Portal
configurability, 7
description, 7
navigation, 10
screen layout, 9
signing in, 8
signing out, 8
Patient Search tab
description, 67
Patient Summary tab
description, 33
subtabs, 34
Patient’s Care Plan and Health Tracking subtab
description, 51
Patient’s Health Tracking portlet
description, 52
patients
how to search for, 67
Personal Information portlet
description, 55
personalization
portlets, 40
portlets
Allergies, 44
Care Plan, 51
Contact Information, 55
data-page controls, 38
data-refresh control, 38
Documents, 48
<table>
<thead>
<tr>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Contact Information, 55</td>
</tr>
<tr>
<td>Family History, 47</td>
</tr>
<tr>
<td>Health Insurance Information, 56</td>
</tr>
<tr>
<td>Hospitalizations &amp; Emergency Room Visits, 44</td>
</tr>
<tr>
<td>Immunizations, 45</td>
</tr>
<tr>
<td>Manage Disease Profile, 60</td>
</tr>
<tr>
<td>Medical Contacts, 56</td>
</tr>
<tr>
<td>Medical Visits, 43</td>
</tr>
<tr>
<td>Medications, 43</td>
</tr>
<tr>
<td>My Health Dashboard, 53</td>
</tr>
<tr>
<td>Patient Information, 56</td>
</tr>
<tr>
<td>Patient’s Health Tracking, 52</td>
</tr>
<tr>
<td>Personal Information, 55</td>
</tr>
<tr>
<td>personalizing, 40</td>
</tr>
<tr>
<td>Problems, 46</td>
</tr>
<tr>
<td>Procedures, 44</td>
</tr>
<tr>
<td>Provider Reports and Documents, 46</td>
</tr>
<tr>
<td>Results Delivery, 57</td>
</tr>
<tr>
<td>Search for a Patient, 67</td>
</tr>
<tr>
<td>Social History, 43</td>
</tr>
<tr>
<td>Vital Signs, 45</td>
</tr>
<tr>
<td>Problems portlet description, 46</td>
</tr>
<tr>
<td>Procedures portlet description, 44</td>
</tr>
<tr>
<td>provider group add or remove a patient, 35</td>
</tr>
<tr>
<td>Provider Reports and Documents portlet description, 46</td>
</tr>
<tr>
<td>proxy requests approval instructions’ proxy requests termination instructions, 29</td>
</tr>
<tr>
<td>description, 26</td>
</tr>
<tr>
<td>R</td>
</tr>
<tr>
<td>registration requests description, 26</td>
</tr>
<tr>
<td>instructions, 26</td>
</tr>
<tr>
<td>Results Delivery portlet configuring, 57</td>
</tr>
<tr>
<td>description, 57</td>
</tr>
<tr>
<td>Results Pending Decision, 58</td>
</tr>
<tr>
<td>using, 58</td>
</tr>
<tr>
<td>Results Delivery subtab description, 57</td>
</tr>
</tbody>
</table>

| S |
| screen layout Patient Portal, 9 |
| Search for a Patient portlet description, 67 |
| signing in instructions, 8 |
| signing out instructions, 8 |
| Social History portlet description, 43 |
| subtabs |
| Demographics, 54 |
| Disease Management, 60 |
| Health Summary, 42 |
| Patient’s Care Plan and Health Tracking, 51 |
| Results Delivery, 57 |

| T |
| tabs My Secure Mail, 13 |
| Patient Search, 67 |
| Patient Summary, 33 |
| tool tip description, 11 |
| truncated items indicated by ellipsis, 11 |

| V |
| Vital Signs portlet description, 45 |