How to Use the Clinical Portal and Claims View



Created by and for the local healthcare community, OneHealthPort solves information exchange and workflow problems shared across healthcare organizations.

Agenda

- What is Clinical Portal and CDR?
- Prerequisites for using the Clinical Portal
- Login with MFA
- Patient Search
- Claims View
- Clinical Summary View
- Viewing Documents
- Other Tabs in the Clinical Portal

Clinical Portal and Clinical Data Repository



Vision For The Clinical Portal



- Aggregation of clinical and claims data provides a more complete history on patient:
 - Social Determinants of Health
 - Advanced Directives
- Simplified transition of care:
 - Less "re-telling of history"
 - Customizable alerts to care team for care transitions
- Compliance with sponsored initiatives
- Meaningful Use reports

What is Your Role as a User of the Clinical Portal?

 Provide feedback on what works and what doesn't.

• Provide input on how we can make it better and provide more value.



What To Expect Of The Clinical Portal

- There is about two years of claims data in the Clinical Portal. If clinical data is sparse for a patient, view claims data to help supplement clinical information.
- Not all patients will have clinical data. Over time, as more providers submit data, there will be a more complete longitudinal health record for patients – however, this will take time to build...

Pre-Requisites for using the Clinical Portal

To use the Clinical Portal your organization needs:

- Policies for designating individuals to access the Clinical Portal, assignment of CDR access roles for those users, and use of personal mobile devices.
 - Designated individuals for Clinical Portal use that do not have an SSO account will need to be nominated to become a SSO Subscriber.
- A OneHealthPort Single Sign-On (SSO) account
 - Not registered? Go to <u>http://www.onehealthport.com/sso/register-your-organization</u>
- A OneHealthPort HIE Participation Agreement
 - Does your organization have an agreement? Go to <u>http://www.onehealthport.com/hie/participants</u>
 - No agreement? Go to <u>http://www.onehealthport.com/contracting</u>

Login to the Clinical Portal with Multi-Factor Authentication



Clinical Portal Access Requires Multi-Factor Authentication

What is Multi-Factor Authentication?

- Multi-Factor Authentication (MFA) adds another layer of security to verify a user's identity by combining two factors that identify an individual.
 - What the user knows (such as a username and password)
 - What the user has (such as a phone or tablet device that generates a token)
 - What the user is (such as a fingerprint, iris scan etc.)*
- Not all applications require MFA. Users will be prompted for MFA only when they try to access an application that requires MFA.
- Currently the Clinical Portal requires users to use Google Authenticator as the MFA.

What is Google Authenticator?

- Google Authenticator is a free App that is downloaded to a user's mobile or tablet device that generates a six to eight-digit passcode which users must provide in addition to their username and password to login.
 - The App is free and does not use cell phone minutes or data
 - Users do not need to create Google account to use Google Authenticator

*NOTE: Currently OneHealthPort does not use this type of identity verification to authenticate users.

Login

OneHealthPort

Subscriber ID:	User Name
Password:	Password
	Login
	This login page requires that you have registered as a OneHealthPort Subscriber.

I'm not a OneHealthPort Subscriber but would like information on subscribing Forgot My Password Forgot My Subscriber ID

Select an Organization

Select Organization y	tion ou want to use for this session.	<i>One</i> Health	Port G+ Log Out
	Select an HIE Member Affiliation		
	Select An Organization		

Note: you will be presented with this screen only if you are affiliated with multiple organizations that have an HIE contract with OneHealthPort.

HIE Homepage



- Ensure you have a CDR access role of normal, restricted or very restricted access. If you do not have one of these roles, contact your organization's SSO Administrator to have one assigned. You will not be able to access the Clinical Portal without a CDR access role.
- Click on "Clinical Portal" to launch the Clinical Portal.

Multi-Factor Authentication Page

OneHealthPort

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For detailed information on Multi-Factor Authentication, and how to download and use Google Authenticator, please visit <u>http://www.onehealthport.com/clinical-portal</u>

Clinical Portal Home Screen

OneHealthPort Clinical Portal	+ Find Patients Q	1			⊥ jrao001 →	එ Logout
Notifications			0	Recent Patients	2	(10)
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There is no data available						

- 1. Find Patients (simple and advanced) is used to search for patients.
- 2. Recent Patients shows the patients viewed by the user during the previous login.
- 3. Bookmarked Patients shows the list of patients bookmarked by the user for easy access.

Searching for a Patient



Clinical Portal Home Page

OneHealthPort Clinical Portal	+ Find Pa	itients Q					A)	එ Logou
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Start searching for a patient in the *Find Patients* field by typing in any of the following search criteria:

- Last name
- First and last name
- First name, last name, birthdate (mm/dd/yyyy)
- ProviderOne client number (P1)
- Social Security Number (SSN)

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Bookmarked Patients

OneHealthPort HIE

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Patient Record

OneHealthPort Clinical Portal ▼♂ Johnny B Danger (07/0	+ Find Patients Q 04/1976) Address 455 Rocket Lane, Touchet, Washington 99360 Home Phone (425) 555-1200 Work Phone	Gender Male Marital Status Unknown Date of Birth 07/04/1976	Insurance Data HC	Patient demographics. This section can be collapsed.
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		Primary Care Physician		
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03/29/2017 11:54 AM	Weight Measured : 89.4 kg	03/18/2016 PRE	VNAR 13 (PCV13) 0.5ML (administered	1)
03/29/2017 11:54 AM	Respiratory Rate : 0 /min	10/05/2015 SEA	SONAL INFLUENZA VACCINE (admini	istered)
03/29/2017 11:54 AM	Body Temperature : 97.7 [degF]	01/15/2015 ENG	ERIX-B 20 MCG (administered)	
03/29/2017 11:54 AM	Height : 187 cm	09/04/2014 ENG	ERIX-B 20 MCG (administered)	
03/29/2017 11:54 AM	Heart Rate : 90 /min	09/04/2014 ENG	ERIX-B 20 MCG (administered)	

Patient Demographics

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- Click on insurance data to view insurance details and the ProviderOne number of the patient.
- You can collapse and expand the patient demographics section.

Claims View

Accessing Claims View



• To access claims information for the patient while in the Clinical Portal, click Claims View.

Claims View

OneHealthP Clinical Portal	ort Claims	View			
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	Address: Nome Phone: (206) 5 Age: 7 Years	Gender: Female 39-9518 Date Of Birth: (
င့် Problems			Procedures		
Last Service Date	Diagnosis Code	Description	Las. Service Date 🔹	Procedure Code	Description
12/27/2016	H9193	UNSPECIFIED HEARING LOSS BILATERAL	^ /2/27/2016	99213	OFFICE/OUTPATIENT VISIT EST
12/05/2016	Z23	ENCOUNTER FOR IMMUNIZATION	12/05/2016	99393	PREV VISIT EST AGE 5-11
12/05/2016	Z130	ENC SCREEN DZ BLOOD BFO D/O INVLV IMMUNE MECH	12/05/2016	90686	Iiv4 vacc no prsv 0.5 ml im
12/05/2016	Z0110	ENCOUNTER EXAM EARS & HEAR W/O ABNORMAL FIND	12/05/2016	85018	Hemoglobin
12/05/2016	Z0100	ENCOUNTER EXAM EYES & VISION W/O ABNORMAL FIND	12/05/2016	36416	Capillary blood draw
12/05/2016	Z00121	ENCOUNTER RTN CHILD HEALTH EXAM W/ABNORMAL FIND			
12/05/2016	T2132XS	BURN OF THIRD DEGREE OF ABDOMINAL WALL SEQUELA	•		<u>ن</u>
🔀 Dental Claims			Pharmacy Clair	ns	
Last Service Date	Procedure Code	Description	Last Service Date 🔹	NDC #	Description
10/25/2016	T1015	Clinic service	01/19/2016	58657052016	ACETAMIN LIQ 160/5ML
10/25/2016	D1206	Topical fluoride varish	01/19/2016	00781615746	AMOXICILLIN SUS 400/5ML
10/25/2016	D1120	Dental prophylaxis child			
10/25/2016	D0272	Dental bitewings two films			
10/25/2016	D0230	Intraoral periapical ea add			
10/25/2016	D0220	Intraoral periapical first f			
10/25/2016	D0120	Periodic oral evaluation	• I		•

- Sections can be re-arranged based on your preference.
- Sort data by clicking on any of the column headers.

Detailed Claims View



- Double click the claim to get detailed information such as service provider.
- Go to the Claims View user guide at <u>http://www.onehealthport.com/clinical-portal</u> under the section Use the Clinical Portal and Claims View for more information about using the Claims View application.

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Claims View

Viewing Clinical Data



What to Expect When Viewing Clinical Data

- Data is view only you <u>cannot add or edit</u> any of the data in the Clinical Portal.
- You <u>may see duplicate data</u>; because of how organizations' systems are set to submit the data.
- **Documents** in the patient record may contain more information than what is viewable in the sections.
- If you <u>see codes instead of descriptions</u> in the sections of the patient's record, this means the data was submitted that way by the organization.

Summary Tab

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01/23/2017	06:31 AM	Heart Rate	: 95 /min			10	0/17/2013 07:06 AM	influenz	a virus vaccine	, inactivated4 (administered)	
						09	9/14/2012 10:05 AM	influenz	a virus vaccine	, live3 (administered)	
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- Summary tab displays the most recent clinical data on the patient across all the sections.
- Clicking on any of the links takes you to the relevant document or tab for more information.
- You can re-arrange the placement of the various sections on the screen to see the most relevant information first or to meet your viewing preferences.

Documents Tab

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• Click on any of the documents to view the information that was submitted for the patient.

Original Document Submitted

		Created On: April 21, 2017				
Patient:			MRY	N: 100-110		
Birthdate:	10.1	200	Se: Next of Kin	x: Male n:		
				1441-40275-77888-4880798		
Table of Contents						
Reason ror visit Plan of Care Encounter Dx Allergies Problem List Smoking Status Functional Status Medications Lab Results Vital Signs Procedures History of Immu Patient Instructio Encounter Histor Medications / Im	s nizations ns / Educations Y munizations Administered					
Keason For Visit						
Routine Dialysis Treatr	nent					
<u>Plan of Care</u>						
Date/Time	Туре	Detail				Ordering Provider
03/29/2017 00:00	HEMO Dialysis Order	Target Wt: 89 kg, Frequency: Mon/Wed/Fri, Blood Flow Rate: 350 mL/min, Dialysate Flow Rate: 800 mL/min, Duration: 240 min			Dr. I	ANNELS CONTRACT
03/31/2017 00:00	Future Lab Order	Hemoglobin			Dr. I	A BERT TERMINAN
04/05/2017 00:00	Future Lab Order	Eosinophil			Dr. I	CONTRACT OF STREET, SQUARE, SQ

- Ensure that pop-ups are not blocked to view the document.
- The links in the document only take you to the relevant section or sections in this document. It does not show all data available in the patient record.

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Future Lab Order

Euture Lab Order

Hematocrit

Homoglobin

04/05/2017 00:00

04/05/2017 00:00

Dr. I

Other Available Clinical Data Tabs

- If the organization submitted data in the correct format, the following information on the patient is available for viewing in the various tabs*:
 - Problems
 - Medications
 - Allergies
 - Vitals
 - Procedures
 - Immunizations
 - Results (labs)
 - History

* Please see appendix for an example of what can be viewed in each of the tabs.

Going Back to the Home Page

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Support

If you have questions about using the Clinical Portal or Claims View contact OneHealthPort HIE support at: <u>http://www.formstack.com/forms/?1688456-</u> sjNVJY8V7I

For general questions, contact OneHealthPort Support at 1.800.973.4797 (toll free) 24 hours a day, seven days a week.

Questions



• Open Issues

Questions from WebEx Chat



Appendix

Clinical Portal Patient Record Tabs



Problems

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	April 2017 3 O4/21/2017 04-57 AM O4/21/2017 04-57 AM	GENERALIZED PAIN since 1 year & 4 months CONSTIPATION since 3 years DIAPHRAGMATIC HERNIA (HIATAL) since 3 years ANEMIA-ESRD since 3 years		

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Allergies



Vitals

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Procedures

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	- February 2017	0		
	► 02/14/2017 08:36 A	MM(UTC-08.00) 🎦 Appendectomy		

Immunizations

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		Work Phone	Date of Birth 07/04/1976	
		Mobile	Age 41 Years	
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Results



NOTE: Charting feature available within the Clinical Portal has limited value until we have more standardized lab results data being submitted across various providers