OneHealthPort

Clinical Portal

OneHealthPort Clinical Portal

Portal View User Guide

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1 Welcome to the OneHealthPort Clinical Portal

The OneHealthPort Clinical Portal provides physicians and other care providers with access to patient information they may not have that can aid in care delivery and coordination of care across caregivers and settings.

Users of the OneHealthPort Clinical Portal may access a longitudinal medical record for their patients, including medication lists, diagnoses and known allergies. A comprehensive patient medical record available at the point-of-care, spanning multiple providers and geographic boundaries, means improved patient care and more efficient clinical workflows.

The User Guide explains how to access patient records and use functions that are available for viewing patient data.

1.1 Before You Start: Configure Your Browser Settings

The OneHealthPort Clinical Portal can be best viewed using Mozilla Firefox version 30, or Internet Explorer versions 11. If you are using another browser, the site and/or functions within the site may not be available. Access to the Clinical Portal is always over a secure connection using the HTTPS protocol. All sensitive information should be removed from your Internet browser's cache each time you end your session. For further information on this topic, refer to the help section of your browser. The user is responsible for their browser settings.

1.2 Authorizations and Access to the Program

To access the portal, your organization must have a OneHealthPort Health Information Exchange (HIE) participation agreement and users will need a unique subscriber ID and password. You can obtain a Subscriber ID and password from the OneHealthPort Single Sign-On (SSO) Administrator in your organization. A subscriber ID and password are used to authenticate you to the application. In addition to username and password, you will be required to complete Multi-Factor Authentication (MFA) to gain access to the clinical portal. Details on how to login to the Clinical Portal using MFA can be found on the *__Use the Clinical Portal__* web page.

In the normal course of providing treatment to a patient, you will only have access to that information and those documents for which you are authorized. The same is true for the Clinical Portal. Your SSO Administrator must assign a specific CDR user role for each user to have access to appropriate patient information in the Clinical Portal. By default, all users have no assigned role to access the Clinical Portal until their SSO Administrator assigns a role (see User Roles below).

1.2.1 User Roles

Each user is assigned one Clinical Data Repository (CDR) user role by the SSO Administrator in their organization. Each role comprises a defined set of authorizations to access the Clinical Portal. Not all the functions described in this guide are available for all user roles. User roles available in the Clinical Portal include:

Role Name	Description
No Role Assigned	No role is assigned
Test Role Only	Test Role Only
Normal Access	Access to content classified as Normal on the Clinical Portal
Restricted access	Access to Normal and Restricted Clinical Portal content
Very Restricted access	Access to Normal, Restricted and Very Restricted content on the Clinical Portal

The SSO Administrator logs into the OneHealthPort administrator login to make all CDR Role assignments for designated users. The *Manage CDR Roles* menu option will only be available to the SSO Administrator if their

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organization has an active OneHealthPort HIE participation agreement. The Subscriber Administrator Menu is shown below:
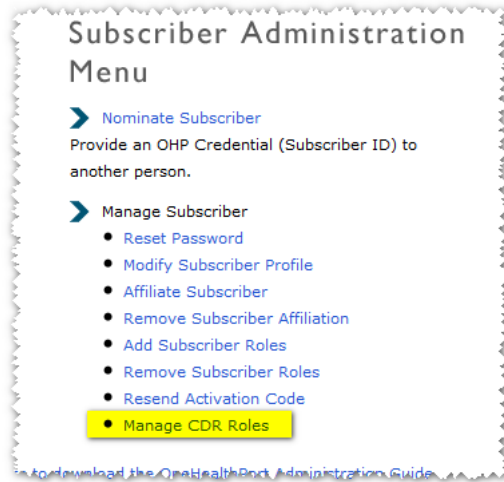
Below are the guidelines for the CDR access roles that can be assigned to designated subscribers in your organization. Each organization will need to create policies that determine which designated subscribers will be provided access to the Clinical Portal and what role will be assigned to them.

Role	Definition and *Confidentiality Level Descriptions as Defined by HL7
No Role Assigned	Subscriber will not be able login to the Clinical Portal.
Test Role Only	Subscriber will be able to login and view UAT (test) environment data in the UAT Clinical Portal, but will not be able to login and view Production data in the Production Clinical Portal.
Normal Access*	Subscriber will be able to view normal or typically non-stigmatizing health information on a patient in the Clinical Portal for data designated as normal confidentiality by the submitting organization.
Restricted Access*	Subscriber will be able to view restricted or additionally protected information on a patient such as sensitive conditions, mental health, HIV, substance abuse, domestic violence, child abuse, genetic disease, and reproductive health; or sensitive demographic information such as a patient's standing as an employee or a celebrity in the Clinical Portal for data designated as restricted confidentiality by the submitting organization.
Very Restricted Access*	Subscriber can view information that is very restricted or extremely sensitive and likely stigmatizing health information that presents a very high risk if disclosed; for example, victim of abuse, patient requested information sensitivity, and taboo subjects relating to health status in the Clinical Portal for data designated as very restricted confidentiality by the submitting organization.

1.3   Getting to Know the Screens

There are four main screens in the OneHealthPort Clinical Portal: Home Screen, Search Results List, Patient Record, and Email Center.

1.3.1 Home Screen

On the Home Screen you can:

- Use the simple or advanced search (Find Patients) to look up patients (search options may vary).
- View and open unread messages (if configured).
- Create and send an email message (if configured).
- Open your Email Center (if configured).
- Set Bookmarks for a patient or edit an existing bookmark.
- Open a medical record by clicking a patient name from the Recent Patients or Bookmarked Patients lists.
- Change the theme of the portal in Preferences via the username button.
- Open Help via the username button.
- Log out from the OneHealthPort Clinical Portal.

The counter in the Notifications, Recent Patients, and Bookmarked Patients sections indicate the total number of elements displayed. In the Messages sections, a counter indicates the number of messages currently displayed out of the total number of messages.

1.3.2 Search Results List

The Search Results list is displayed after the search is executed from the Simple Search field or Advanced Search (Find Patients). Access to Simple Search and available or required search fields may vary (for more information, see How to Find a Patient).
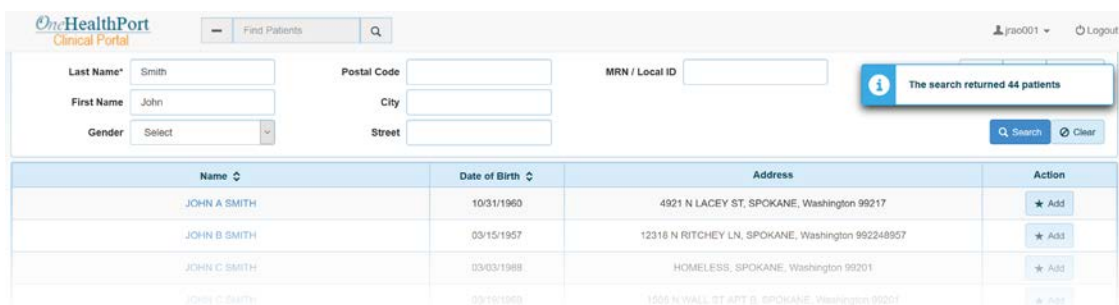

On the Search Results list you can:

- View the names, birthdates and addresses of the patients that were returned as a result of search criteria.
- Click on a patient's name to open the medical record.

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- Bookmark a patient's medical record using the ★ Add button. Or, if the patient is already bookmarked, edit the notification subscriptions for the patient via the Edit button (see Setting Bookmarks and Sending Messages for more detail).
- Logout from the OneHealthPort Clinical Portal.

Note: Search results may be filtered based on your access rights.

1.3.3 Patient Record
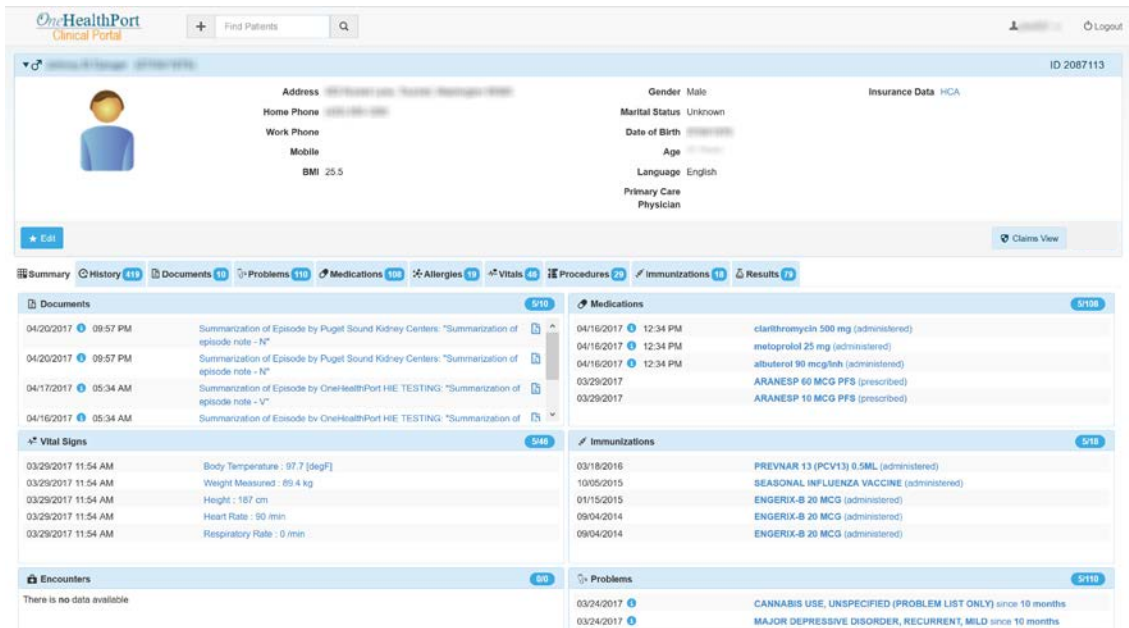
In the Patient Record you can:

- Navigate to the Home Screen by clicking on OneHealthPort Clinical Portal above the Patient Name.
- Use the Simple or Advanced Search (Find Patients) to find another patient (search options may vary).
- View documents and patient data (demographic, insurance and medical data).
- Send a link for the selected patient or patient documents as an email to another user (if configured).
- Bookmark the selected patient.
- Change the theme of the portal in Preferences via the username button.
- Open Help via the username button.
- Logout from the OneHealthPort Clinical Portal – return to "My Health Information Exchange Information" page.

(You will find more information on the screens and the screen elements in Chapter 5 - *Screens and Screen Elements*.)

In the Patient Record, counters on the various tabs indicate the total number of items available for the patient **(14)** and in the sections indicate the number of elements currently displayed out of the total number of elements **5/10** .

1.3.4 Restricted Access to Very Sensitive Data

When dealing with highly-sensitive data, such as data about substance abuse and mental health, users must be very attentive. Access to this data is usually restricted to certain roles. If you have access, such data is flagged with the acronym SAMHSA (Substance Abuse and Mental Health Services Administration) or a lightning bolt icon to indicate high confidentiality. You will see the icon on the Patient Banner of a patient record and in notifications and messages if they contain any such data.

1.4   Change the Theme of Your Portal View

You can manage the appearance of your OneHealthPort Clinical Portal view by changing the theme.

- Click on the username button. A menu opens.
- Click Preferences. The preferences dialog opens.
- In the drop-down list, select a color theme. The color of the dialog box changes according to the selected theme.
- Click the Save button to resume your activity in the portal with the new theme, or click Cancel to revert selections and resume activity.
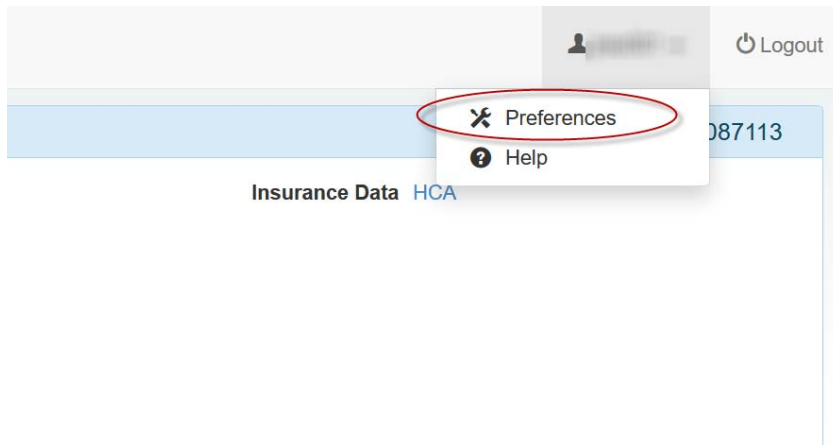
1.5   Open Help

- Click on the username button. A menu opens.
- Click Help. Help opens. From this window you may click the documentation link to access a guide, or review the contact information for help.
- Click the back button [← Back] to close the Help window.

2   How to Find a Patient

The two search functions in the Find Patients section allow you to search for one or multiple patients. The search functions are available on all screens of the OneHealthPort Clinical Portal. Simple Search allows you to use any search criteria. The Advanced Search expects you to enter specific criteria such as first and last name, address or date of birth. Open the Advanced Search by clicking on the plus icon next to the Simple Search (Find Patients) field or the magnifying glass icon (configuration may vary).

Note: Depending on your user role and access rights, some search parameters of the Advanced Search and the Simple Search functions may not be available, or certain elements may be required to execute a search. For further information about the Clinical Portal access role assignments, contact your OneHealthPort SSO Administrator.
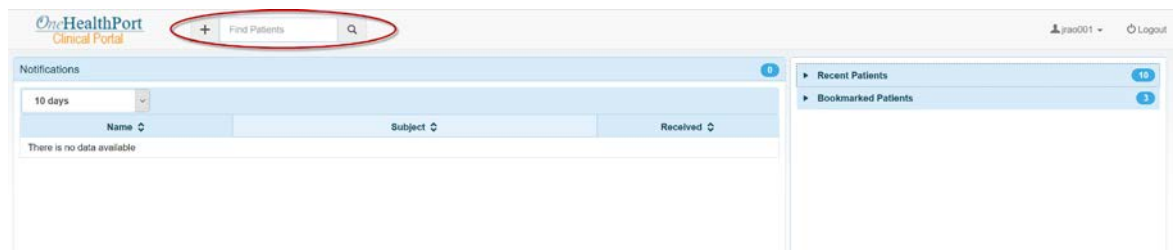
2.1   Search for a Patient Using Simple Search

Simple Search allows you to use any search criteria. From the search result, you can access the corresponding patient record.

Tips and tricks when entering search criteria in the Find Patients field:

The search parameters available in the OneHealthPort Clinical Portal are listed below.

- For multi-part criteria, enclose the search term in quotation marks (e.g., "North Bend").
- Combine more than one search criteria in the search field - just enter an empty space between terms (e.g., "Johnson Olympia", or "Jones North Bend").
- When performing a search, you can use an asterisk (*) as a Wildcard. Just enter the first three characters of the search term followed by the asterisk * in the field (e.g., Jon*). Wildcards can only be used at the ends of words (that is, not in numeric expressions or at the beginning or in the middle of a word). This allows for more flexible searching, as the search functions in the OneHealthPort Clinical Portal are very literal.
- Names with more than one special character such as spaces, -, ', and " are searchable if included in quotes (e.g., "Al' a Wana-Ben'ver Ian").

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2.2 Search for a Patient Using Advanced Search

Advanced Search allows you to search for a specific patient using specific criteria like date of birth, address or medical record number. The availability of search parameters depends on your user role; therefore, some search parameters may be grayed out, which indicates they are unavailable. Some parameters (or a certain number of search fields) may be required to search patients, and will be indicated by an asterisk (*). A notification bubble will inform you if the required criteria are not satisfied.

- Click on the plus icon next to the Simple Search (Find Patients) field, or click on the magnifying glass icon
  [Q] (depending on your configuration).
- The fields of the Advanced Search are displayed.
- Enter one or more search criteria into the respective field.
- Required fields are marked with an asterisk (*). Use format "mm/dd/yyyy" for the date of birth.
- Click on the Search button.
- The search result will be displayed.
- If the search criteria results in too many results to display, an error pop-up will appear – see example below:
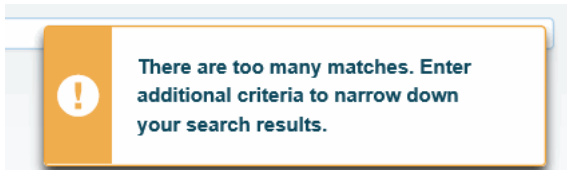
NOTE: In the Advanced Search option you have to enter values in at least two of the available fields to search.

3 View Patient Information

After finding the desired patient, click the patient name to open the Patient Record. You will be able to access patient data according to your CDR access role.

3.1 Display Documents or Data

There are several ways that you can open a patient record to view data, from the Home Page (after a search) or from a link in a message or notification.

- To access a record from the patient search results, simply click on the patient's name and you will be taken to the Summary View of their record. Navigate to the document or data that you want to view.
- To access a record from a message, click on a document or data link from a notification or message. You will be taken to the record of the patient, and the referenced data is displayed on the respective screen (such as the Documents tab or Results tab).

3.1.1 Display Laboratory Results

Once you've opened the Patient Record, you can view laboratory results graphically and in a table.

- Click on the Results tab.
- Expand the desired lab panel by clicking on the arrow icon (>). The test data and values for the selected panel are displayed. A red triangle icon will indicate any abnormal results on the panel, and a comment bubble icon will display if comments were included with the results.
- Click on the desired test name.
- The values on record for the selected test are displayed in a graph and the details in a table below. Normal, abnormal, and critical values are differentiated by color, as indicated on the key above the graph. Reference ranges may be reflected, too.
- You can zoom in the view by clicking the Show All Values button, or select Show Less Values to minimize the view.
- Click the Back button to return to the selected panel.

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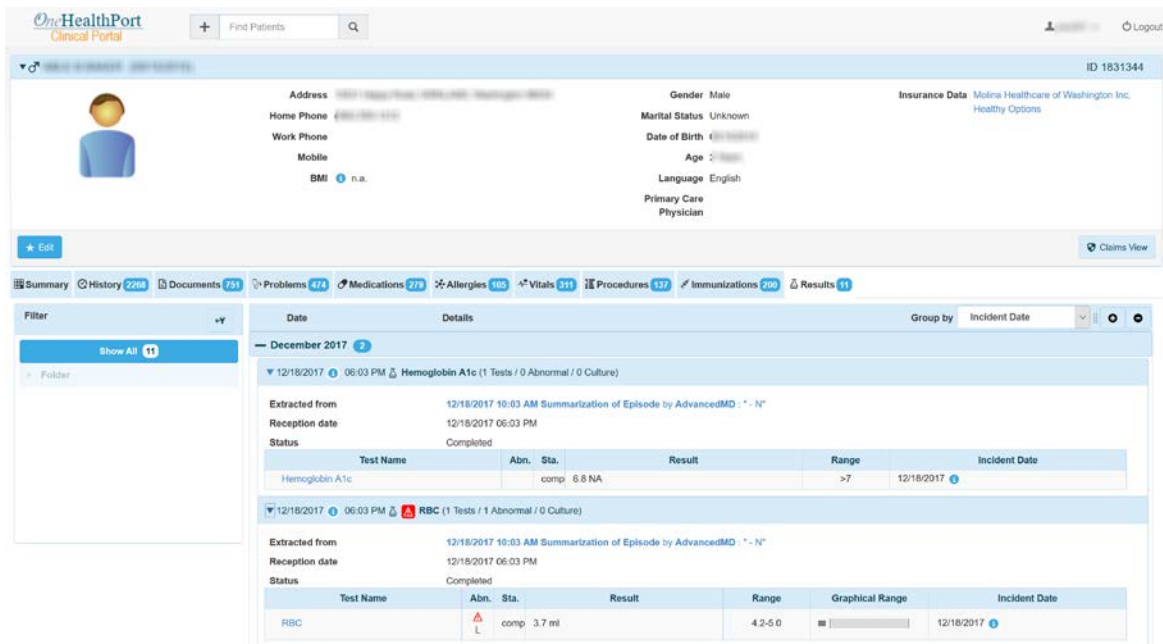
3.1.2 Filter Documents or Data

From the Patient Record, you can filter the data shown in the record from the tab view. Click on a tab to view the corresponding data, and ensure the Filter section is open (the pane is located to the left of the record view); click the filter icon [icon] if closed to expand the section.

- In the Filter section, click on the desired filter.
- The record displays the data elements or documents according to the selected filter. The active filter is highlighted in the Filter section.
- Click the desired data element.
- Remove the selected filter by clicking on the Show All filter.

3.1.3 Using Claim Information in Claims View

When accessing the Claims View the data is grouped in categories with drill down to detail levels.

This data is in a separate application but linked at the patient level. The Claims View provides a supplemental view of claim history on a patient. The Medical, Dental and Pharmacy claims are split into four grouped areas of Problems and Procedures derived from the Medical claims. Pharmacy and Dental occupy their own sections to leverage searching and sorting based on codes specific to dental or pharmacy. All of the sections and columns can be moved around by the user for optimal layout. Each of the sections has different "group by" criteria as well for organizing the sort of that section.

The Claims View initial opening screen is shown below:

If the user selects an individual line in one of the sections and clicks on it, it will open a "drill down" display window with detail on that item (example below). If the specific code has more than one date of service with more than one clinical organization it will appear as a drop-down list of other dates of service for viewing.

3.1.4 Group Documents or Data

From the tab view of the Patient Record, you can combine grouping with filtering. This enables you to locate the documents or data you need quickly out of a mass of documents or data.

- In the Filter section, click on the desired filter (as previously reviewed).
- The report displays the data elements or documents according to the selected filter.
- In the Group by drop-down menu (upper right corner above the record view), select the desired grouping.
- The record displays the desired data elements or documents according to the selected filter and grouping, e.g., medical report grouped by facility.

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3.2   Display Detailed Insurance Data

Open the Patient Record and ensure the Patient Banner is expanded.

- In the Patient Banner, click on the insurance name or ID (if available).
- The insurance screen is displayed. The first insurance (most current) on the list is expanded.
- If there is more than one insurance displayed, click on the Expand button (+) to reveal more information.
- To return to the Summary View, click the Summary tab, or navigate to the desired tab.
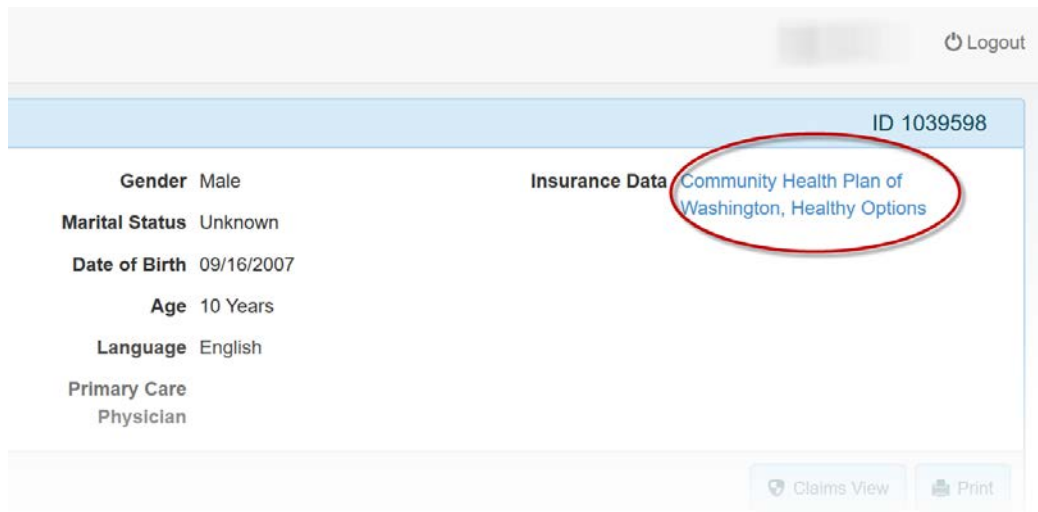
4   Set Bookmarks

Bookmarks can be set to easily go to a record of a patient that may have been seen recently or seen on a frequent basis.

- Click on the Bookmark ★icon ★ or Add ★ Add icon next to the patient's name.

The color of the button will change upon selection, indicating a bookmark was set. You can set bookmarks to view bookmarked patients easily from the home screen.
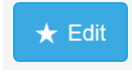
5   Screens and Screen Elements
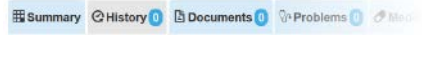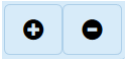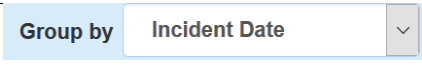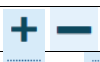
5.1   Screen Elements

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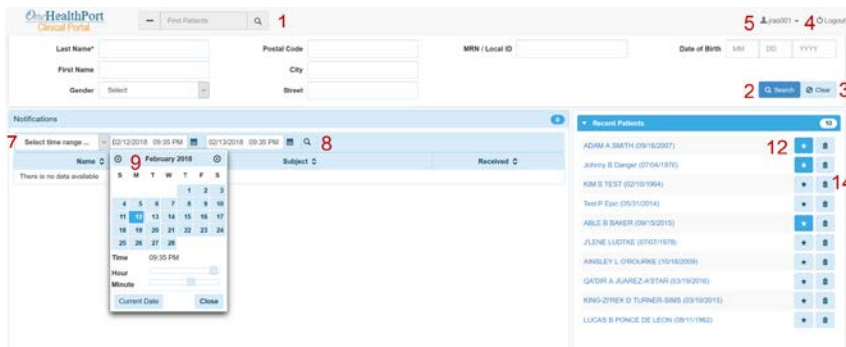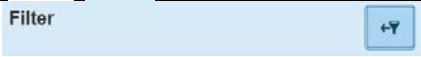
	Element	Meaning
	START PAGE	
1	![+ Find Patients]	Use this field to search for a patient record. (If Simple Search or Find Patients is not enabled, the user will see a magnifying glass icon to search via the Advanced Search option.)
2	Q Search	This button starts the Advanced Search.
3	⊘ Clear	This button removes search criteria from the fields of the Advanced Search.
4	⏻ Logout	Use this button to logout from the application and return to the OneHealthPort HIE Apps page.
5	♟user1 ▾	This button opens a menu that allows you to manage user preferences and access the Help page.
6	5/10 (or) (14)	These counters show how many items are displayed out of a total, or items available in a given section (respectively).
7	10 days ∨	From this drop-down, you can filter messages or notifications displayed on the Home Screen inbox(es) by time range.
8	Select time range ... ∨ 02/11/2018 09:31 PM 📅 02/12/2018 09:31 PM 📅 Q	If you have selected Select Time Range from the time frame filter (above), the messages displayed will be filtered according to the time range entered into these fields.
9	📅 (→) 02/12/2018 09:31 PM 📅 Q February 2018 ...	The Calendar icon opens a calendar. Here you can select the desired date. Use the arrows to navigate months.

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
	Element	Meaning
10	**Name**	An active list column or section is highlighted in a dark color.
11	Subject	An inactive list column or section is not highlighted. Arrows in a column indicate the sorting
12	★ ★ Add	Use these buttons to set a bookmark on a patient. One click activates the default settings, and a second click opens a dialog that allows you to choose specific settings for the documents or data you want to bookmark (see Edit button below). Any recently opened patient records are bookmarked automatically.
13	★ Edit	Use this button to open the Subscription dialog, which allows you to choose specific settings for the documents or data you want to bookmark for notifications, as well as remove the bookmark on a patient.
14	🗑	This button removes a bookmark. You will no longer receive notifications.

	PATIENT RECORD	
	OneHealthPort Clinical Portal	This button will navigate to the home screen to view notifications, messages and patient lists.
	SAMHSA ID 1	The SAMHSA (Substance Abuse and Mental Health Services Administration) acronym indicates that a medical record contains very sensitive data.
	(patient photo placeholder)	The Edit button (if enabled) is displayed on mouse-over of the patient photo (or placeholder) in the Patient banner, opens the Change Photo dialog. Here you can add, change or remove a patient's photo. Users must have the appropriate role to view the Edit button and change photos. Only the CDR sponsor can upload a patient's picture. However, this functionality is currently turned off.
	➕ ➖	These buttons will open or close the patient banner, which displays the demographic data of the selected patient.
	🔲 Summary ⏱ History 0 📄 Documents 0 🩺 Problems 0 💊 Med	Clicking a tab will open the respective screen. The tab of the opened screen is highlighted in a dark color. As default, you will find the following tabs to open the respective screens: Summary, History, Documents, Problems, Medications, Allergies, Vitals, Procedures, Immunizations and Results.
	➕ ➖	These icons expand all or collapse all data on the tab views of the record.
	Group by Incident Date ⌄	This drop-down menu allows you to group the displayed documents and data. Depending on the selected tab, different grouping options will be available in the drop-down.
	➕ ➖	These icons open and close the section headers in the Tab view.
	▶ ▼	These icons open and close details for documents and data elements in the Tab view.
	📁CCDA	This icon displays the type of document file. Clicking the symbol will open the document in the respective application, e.g. Adobe Reader
	⚡	This icon indicates that the document contains SAMHSA (substance abuse and mental health) data, which is very sensitive and should be handled accordingly.
	ℹ	This icon displays additional information on mouse-over.
	💬	Clicking this icon displays a comment, such as comments on lab values.

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	[icons]	These icons will open or close (respectively) the Filter section.
	Filter	Using the filter allows you to display specific documents and data. • *Show all* displays all documents or data • *Document class* displays documents by document class. Filters available may vary by tab as set by the OneHealthPort Clinical Portal Administrator.* • *Folder* displays data by folders (if configured during Document Upload). *Filters may vary by tab.

	# HISTORY AND DOCUMENT SCREENS	
	Filter Show All 108 ▼ Activity Type All administered medications (77) All prescribed or planned medications (31) All dispensed medications (0) ▶ Folder	The encounter filter allows you to specifically display any encounter documents in the History tab. Filters available may vary by tab or based on settings managed by the Clinical Portal Administrator.
	# RESULTS VIEW	
	[icon]	This icon next to the name of the test opens the respective history page when selected.
	[icon]	This icon indicates that mapping to the information on the isolated organism could not be found. You may review the meta data for details.
	Show less values	This button allows you to reduce the number of shown in the graphical section of the page.
	Show all values	This button displays all available values on this test in the graphical section of the page.

5.2 Sections of the Home Screen
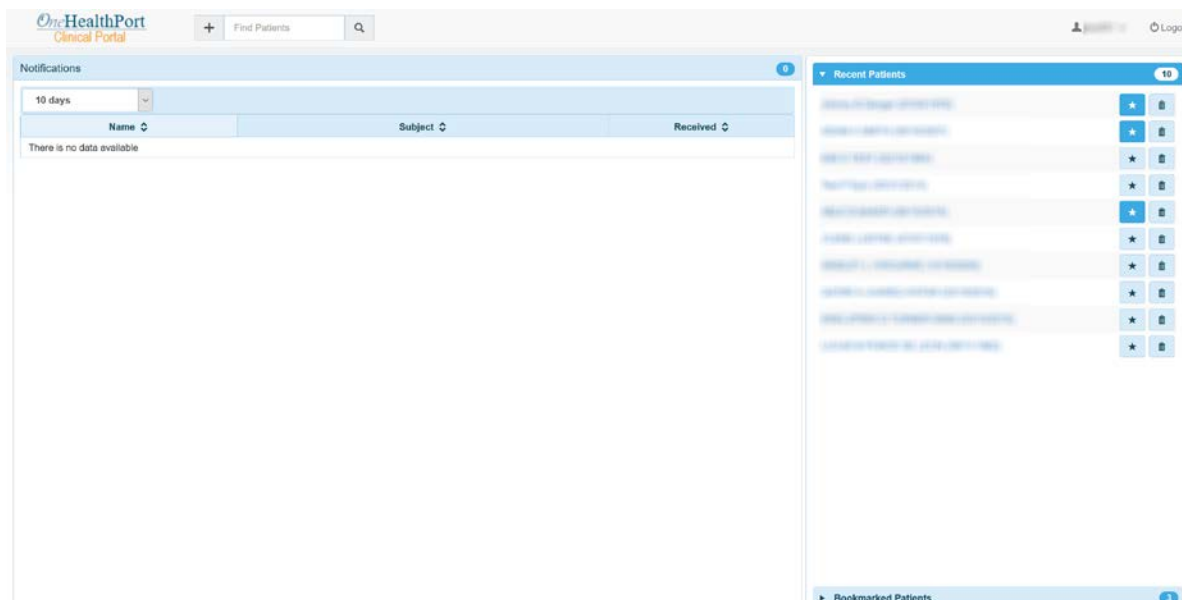
The Home Screen consists of several sections.

- Next to the Notifications and Messages sections is the Recent and Bookmarked Patients lists.
  - o The Recent Patients list displays the names of the latest ten patients whose records you opened previously.
  - o The Bookmarked Patients list shows names of patients whose records are bookmarked or for whom documents are bookmarked. (For more information, see Bookmarks section.)

5.2.1 User Preferences Dialog

The User Preferences dialog is opened by clicking the button with your username in the header bar of the OneHealthPort Clinical Portal.

In the dialog you can:

- Select a color theme.
- Select a language (options may vary, but default and selection is generally English).
- Select whether you want to Display Time Ranges in the headers of medical entries by checking the box (to see the calculation of how long a problem or an allergy existed, e.g., since __ years).
- Enter an email address, which is used for sending notifications of bookmarked medical records or documents. When you enter an address into the field, you will not only be notified of incoming documents or data via your OneHealthPort Clinical Portal inbox(es), but also to the email account entered in the User Preferences dialog.

5.3 Sections and Screens of the Patient Record

As on the Home Screen, on the screens of the Patient Record you will find a navigation header displaying the search functions and the Logout and Username buttons.

5.3.1 Patient Banner

Just below the navigation header, you will find the expandable Patient Banner, which is available on all screens within the Patient Record. The Patient Banner is expanded by clicking the Plus icon and closed by clicking the Minus icon.

In some cases, you will see the acronym SAMHSA next to the patient's ID in the Patient Banner, if you have the appropriate user role. This serves as a reminder that the patient record in context includes very sensitive data.

When opened, the Patient Banner displays a patient's master data such as name, address, age, gender, phone number, marital status, Clinical Portal ID, or insurance. A link from the insurance name opens the insurance screen with more detailed information. (See Insurance Data Screen for additional details.)

5.3.2 Insurance Data Screen

The Insurance Data Screen displays detailed information about the patient's insurance data. To view, click the insurance name from the patient banner.

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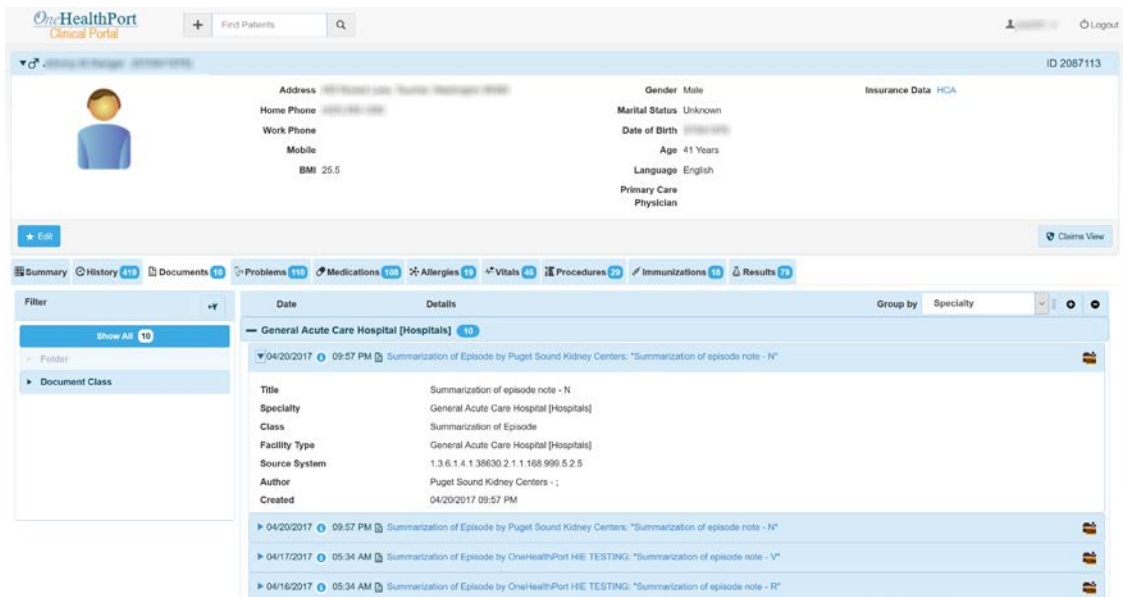
5.3.3 Data List

The Data List shows documents and medical data pertaining to an individual patient. This is essentially the body of the Patient Record for each screen. The list can be viewed by clicking a data element from the Summary view, or clicking on one of the tabs below the Action Bar. The default Group by selection may vary by tab. The standard display date for documents and medical data is the effective date. (If no effective date is available, a fallback date will be used and an indicator ("i") will signal that another date type is displayed, such as document creation date.) The display of the latest information is expanded.

5.3.4 Filter

This section displays all filter options, which may vary by tab, as well as Folders that you are authorized to access in the Filter section.

- Folders contain at least one document from the Patient Record in context. They are displayed in chronological order; the first folder contains the most recent changes.
- Folders may group documents, for example by episode of treatment. Documents in a folder are collected from the Upload Document function within the portal.
- When you are hovering the cursor over a folder, additional information such as name, last update, comments and codes will be displayed.
- Once you click the folder, documents displayed on the screen are filtered according to the content of this folder.

5.3.5 Screens of the Patient Record

The Patient Record contains the following screens, some of which include specialized actions:

Screen	Description
Summary	This screen is the default screen of the Patient Record. It displays the latest documents and data from the various sections (most recent 5 items). Abnormal findings will be marked by an icon ⚠ .

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Screen	Description
History	This screen lists all the documents and data that are on file in the selected patient record (complete history). You can filter or group the list to narrow down the number of list entries shown.
Documents	This screen displays what documents exist along with accompanying information. Click the icon or link to view the document.
Problems	This screen lists any documented problems or diagnoses.
Medications	This screen documents any medication the patient received or is receiving.
Allergies	This documents any known allergies and corresponding information.
Vitals	This screen displays the vital signs reported for this patient.
Procedures	This screen displays any procedures for this patient.
Immunizations	This screen displays any vaccinations administered to the patient.
Results	This screen displays lab values of the patient. Abnormal findings will be marked by an icon ⚠.

5.4 Functions of the Summary Screen

This screen is the initial view of the Patient Record. It displays a summary view of all documents or data available on the other screens of the OneHealthPort Clinical Portal. You may open the documents or data by clicking on the links.

5.5 Functions of the History Screen

The History screen lists all medical data and documents that are on file in the selected patient record. You can filter or group the list to narrow down the number of list entries on display. You can also specifically filter for encounter documents.

Grouped by	Description
Incident Date	The date on which the event took place, or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).

5.6 Functions of the Documents Screen

The Document Screen displays all documents for the selected patient.

Documents in the table can be grouped in a variety of ways:

Grouped by	Description
Incident Date	The date on which the event took place, or the effective date.
Date	The date the document was received. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Type	This criterion groups documents according to document type. The document type indicates what the document is, e.g., ultrasound report, discharge report, lab report.
Class	This criterion groups documents according to class. Document classes comprise different types of documents, reports, studies, physician letters, etc.

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Grouped by	Description
Incident Date	The date on which the event took place, or the effective date.
Specialty	This criterion groups documents by medical specialty (gynecology, laboratory, radiology, etc.).
Facility type	This criterion groups documents according to the type of facility in which they originated (hospital, emergency clinic, etc.).
Source ID	This criterion groups documents according to the source in which they originated.

5.6.1 Filter

In the Filter section, you can filter the documents by Document Class, Encounters or by Folders. With these filters, you can limit the number of displayed documents to those you are interested in viewing.

5.7 Functions of the Problem Screen

This view displays metadata and most important contents of structured data on a patient's problems (diagnoses). This data originates from documents that are available on the Documents tab, or from other data sources. If data source is a document, clicking the Structured Document link in the details will take you to that document in the Documents tab.

Data in the table can be grouped in a variety of ways:

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Problem Codes	This criterion groups documents according to the problem. Depending on the configuration of the application, the documents will be grouped by diagnosis as code, e.g., ICD-10, or as text.
Status	This criterion groups documents according to the status.

5.8 Functions of the Medications Screen

This view displays metadata and most important contents of structured data on a patient's medications. This data originates from documents that are available on the Documents tab, or from other data sources. If the data source is a document, clicking the Structured Document link in the details will take you to that document in the Documents tab.

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).

5.8.1 Activity Type Filter

The Activity Type button opens a list of Filters. By default there are the following activity type filters regarding medication:

- All administered medication
- All prescribed or planned medication
- All dispensed medication

5.9 Functions of the Allergies Screen

This view displays metadata and most important contents of structured data on a patient's allergies. This data originates from documents that are available on the Documents tab, or from other data sources. If data source is a document, clicking the Structured Document link in the details will take you to that document in the Documents tab.

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Severity	This group filters the allergy data by severity (as indicated per the source).

5.10 Functions of the Vitals Screen

This view displays metadata and most important contents of structured data on a patient's vital signs. This data originates from documents that are available on the Documents tab, or from other data sources. If data source is a document, clicking the Structured Document link in the details will take you to that document in the Documents tab.

You can use a grouping to narrow down the number of list entries shown:

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Vital Sign Code	Vital signs displayed on this screen can be grouped by Vital Sign Code.
Status	Filters the displayed vital signs by status.

5.11 Functions of the Procedures Screen

This screen displays any procedures reported for the selected patient. You can use a grouping to narrow down the number of list entries shown:

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Procedure Code	Procedures displayed on this screen can be grouped by Procedure Code, e.g., CPT.

5.12 Functions of the Immunizations Screen

This screen displays the documentation of any vaccinations or other immunizations that were administered to the patient. You can use a grouping to narrow down the number of list entries shown:

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).
Product Code	Sorts the immunizations by product code.

5.13 Functions of the Results Screen

This screen displays any lab values taken for the selected patient. Any abnormal findings will be marked by an icon⚠. The values and reference ranges are taken from information received by the OneHealthPort Clinical Portal, either from a clinical source or a laboratory feed. Each value contains a link which opens a screen that gives you more detailed information, graphically and as a table. The entries are sorted by date. The ↻ indicates that there are updates of the test available, and opens a historical view for the specific test. The 💬 indicates that comments are available for the test.

Grouped by	Description
Incident Date	The date on which the event took place or the effective date.
Date	The date the source document was created. The standard setting is for the newest documents to be open. When sorted by date, documents are grouped by degree of relevance: today, yesterday, this month, month name and year (e.g., July 2011, March 2012).

On the Graph view, a key will indicate markers for normal, low, and high range results. Moving the cursor over the values will display result details. The table below the graph provides more detail for the values.

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