Health Information Exchange

Front Desk User Guide

NATIONWIDE CHILDREN'S

When your child needs a hospital, everything matters.℠

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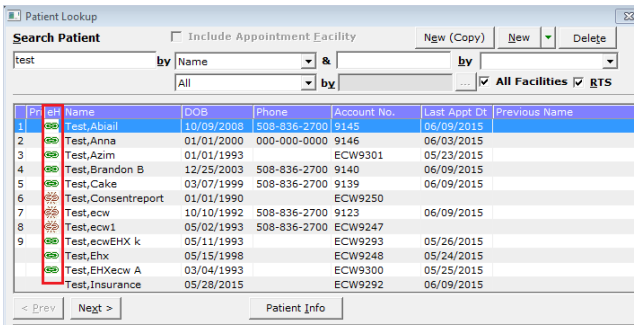
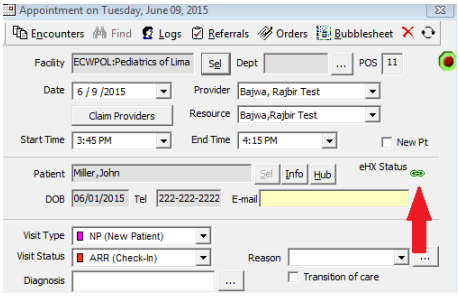
Patient Lookup- Viewing eEHX Status from Patient Lookup

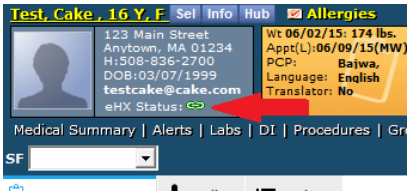
The Patient Lookup dialog now contains an eHX column. A link icon in this column indicates that a patient has some sort of relationship with the eEHX Portal. See the table for the icons below.

ICON	Description
	The green link indicates that a patient has opted-in, and the consent obtained from them is still effective. When the consent is about to expire, this icon changes to a dark orange partially broken chain link.
	The orange broken link indicates that a patient has opted-in, but their consent will expire within one month (link is shown only broken at the top).
	The red broken link indicates that a patient has opted-in, but their consent has expired (link is shown broken at the top and bottom).
	The blue oval icon indicates that a patient has opted in, but only their demographic information has been uploaded to the eEHX Portal.
	The blue question-mark icon indicates that a patient is undecided about whether to opt-in or out.
	No icon indicates that a patient has never been linked with the eEHX Portal in any way, or they have been completely unlinked.



The same icons displayed in the Patient Lookup also appear on the Appointment window when scheduling appointments and in the Patient Dashboard on Progress Notes.





Patient Lookup- Viewing Accounts on the eEHX Portal

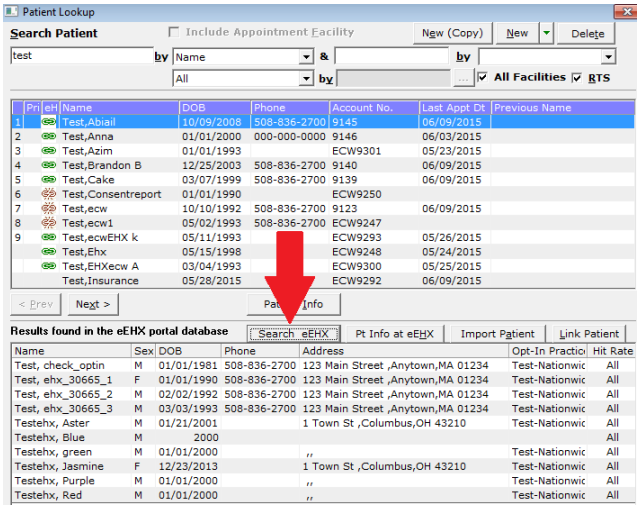
The bottom pane of the Patient Lookup window displays information about accounts that are only found on the eEHX Portal. This section is most often used to look up patients that have been registered with the eEHX Portal from other community practices.

To view accounts only on the eEHX Portal, follow the steps below.

1. From the Patient Lookup window, enter the search criteria into the search fields at the top of the window.
2. Click the Search **eEHX** button.

TIP

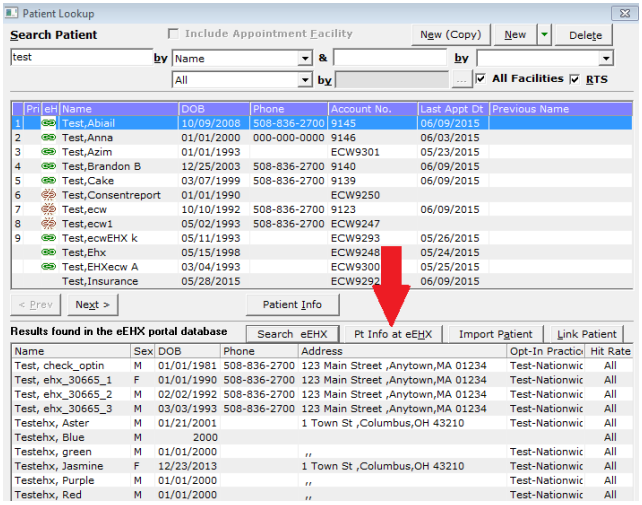
The top search pane represents your local database. The bottom search pane represents the eEHX database.



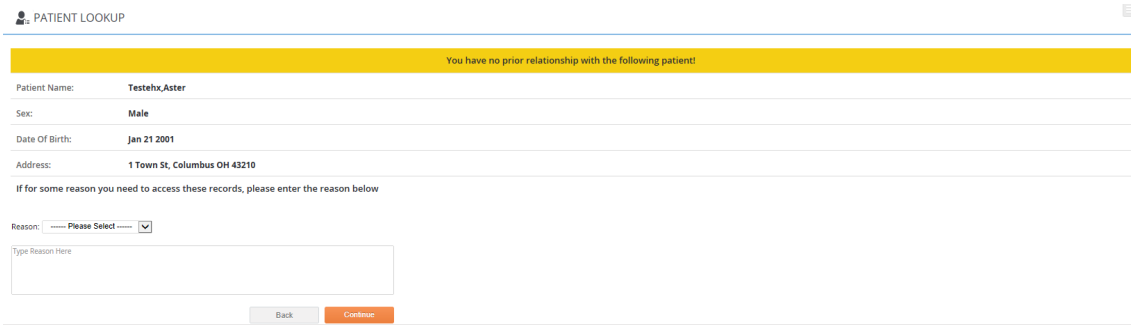
The accounts in the eEHX Portal that match the search criteria but do not exist in your local system or have not been uploaded for your local system to the eEHX Portal display in the bottom pane.

Patient Lookup- Viewing and Downloading Patient Information on the eEHX Portal

1. Basic information about a patient on the eEHX Portal can be viewed from the Patient Lookup window by clicking on the **Patient Info at eEHX** button.



2. If there is not a prior relationship with the patient, you are prompted to give a reason for accessing the patient's records.

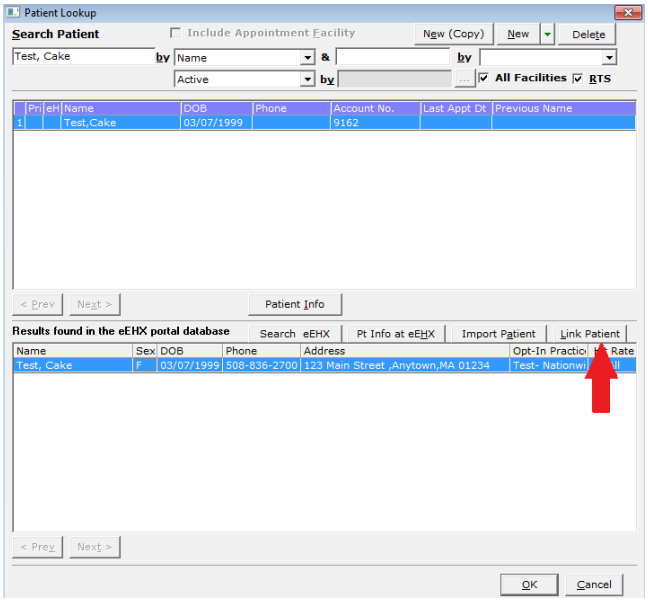


3. Select a reason from the Reason list and click the **Continue** button to look up the selected patient's information. If *Other* is selected from the Reason list, type the reason for accessing the patient's information in the **If Other** field before clicking **Continue**.

Patient Lookup- Linking Existing Practice Patient to eEHX Patient (Link Patient)

Established patients can be linked to an eEHX existing patient using the **Link Pt** button on the Patient Lookup window. This will link the established patient to an existing eEHX patient.

1. From the Patient Lookup window, highlight a patient in your practice database (top pane).
2. Click the Search **eEHX** button. Accounts on the eEHX Portal that are similar to the selected patient will display in the eEHX search window (bottom pane).
3. Highlight patient in eEHX and search window and click the **Link Pt** button.

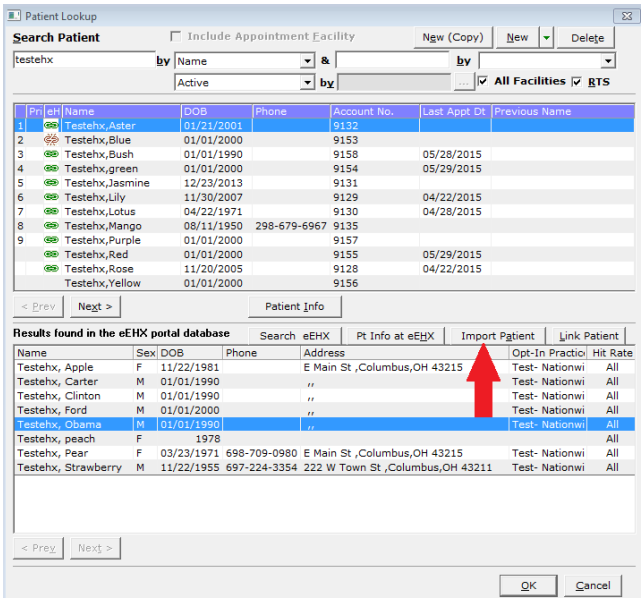


4. When the confirmation window opens, click **Yes**.
5. When the confirmation window opens, click **OK**. The patient is linked with the selected account on the eEHX Portal.

Patient Lookup- Importing Patients from the eEHX Portal (Import Patient)

Demographic information for new patients can be imported from the eEHX Portal into the eClinicalWorks (eCW) EHR.

1. From the Patient Lookup window, highlight a patient's name in your practice database (top pane).
2. Click the **Search eEHX** button. Accounts on the eEHX Portal that are similar to the selected patient will appear in the eEHX search window (bottom pane).
3. Highlight the patient's name in the search window and click the **Import Pt** button.

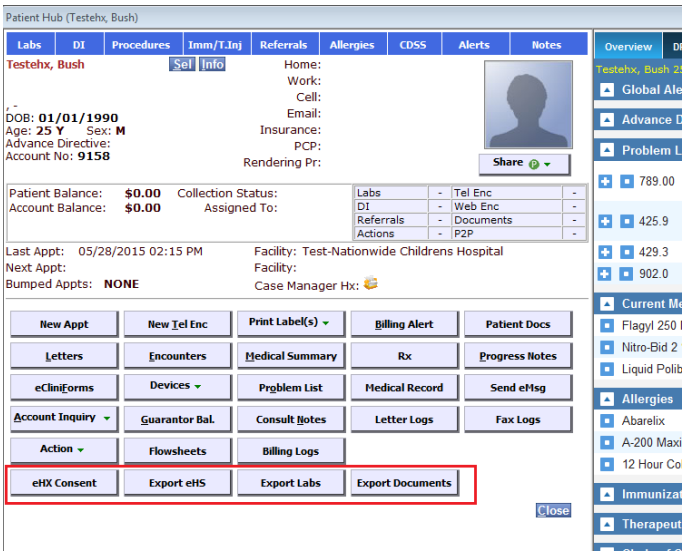


4. When the confirmation window opens, click **Yes**.
5. When the confirmation window opens, click **OK**.

The Patient Information window opens and all of the demographic information contained in the eEHX Portal defaulted into the fields here, except the **Fee Schedule** and **Release of Information** fields. Information in these fields must be manually entered by your practice to ensure it is correct.

Patient Hub- eEHX Buttons

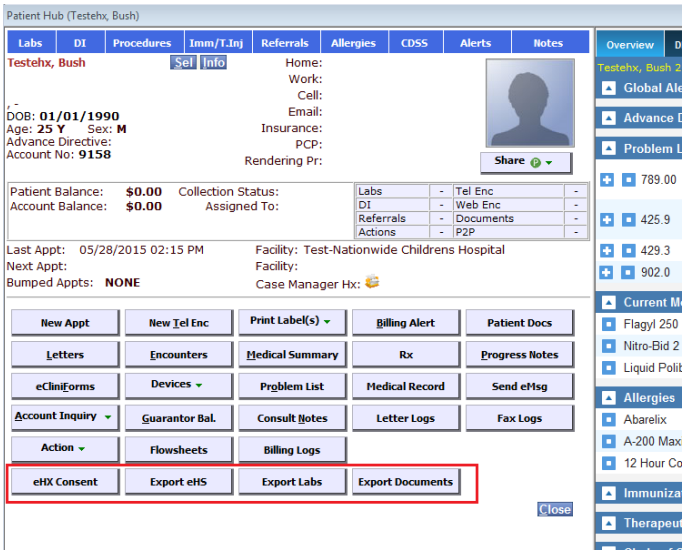
Several buttons display on the Patient Hub for eEHX- enabled patients.



a. Export eHS- click the **Export eHS** button from a Patient Hub to upload the latest CCD (Continuity of Care Record) information to the eEHX Portal.

b. Exporting Labs- click the **Export Labs** button from the Patient Hub to upload reviewed tab and diagnostic imaging test results to the eEHX Portal.

c. Exporting Patient Documents- Click the **Export Document** button to upload patient documents to the eHS Portal.



Patient Hub: eHX Consent

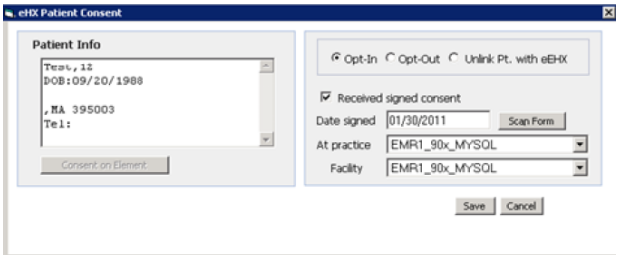
Unlinking Accounts with the eEHX Portal (Opt out)

Patients that have been linked with the eEHX Portal can be completely unlinked. To completely unlink a patient, follow the steps below.

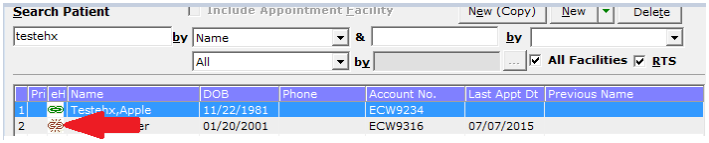
STOP

Unlinking patients will opt them out of the eEHX. The patient will no longer be accessible on the eEHX.

1. Go to eEHX Consent from Patient Hub.

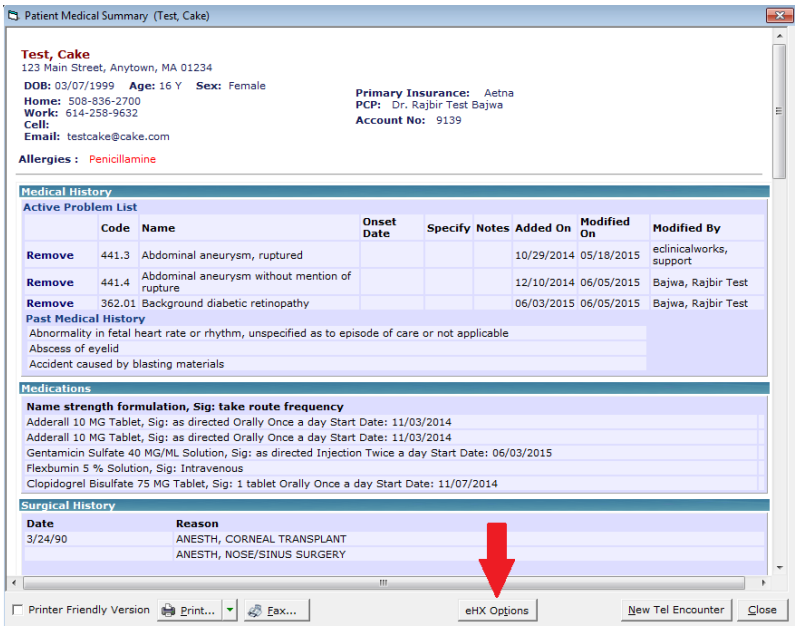


2. Change the date to when the patient opted out.
3. Select the Practice from which the patient is being opted out from.
4. Select the **Opt out** radio button. The patient is unlinked from the eEHX Portal. You should see a broken orange link on the Patient Lookup window.



Patient Hub- Accessing eEHX From Medical Summary Window

An **eEHX Options** button is displayed on the Medical Summary window. This window is accessed from the Patient Hub.



Click the **eEHX Options** button to open the drop-down and select one of the following options:

a. View eHS at eHS- View the patient's information on the eEHX Portal. This information can be imported into the latest encounter. This option is the same as the View and Import eHS option that is accessed from the **eHX Options** button on the Progress Notes window.

b. Export eHS to the eHX- Export the patient's latest medical information to the eEHX Portal. This option is the same as the Export eHS to eHX option that is accessed from the **eHX Options** button on the Progress Notes window.

STOP

If you do not have eEHX clinical access you will not be able to view the eHS.

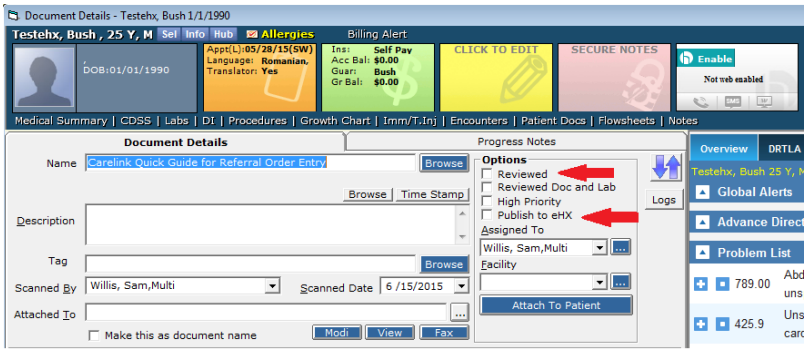
Patient Hub- Patient Demographics/Publishing to eEHX

Only certain documents are uploaded to the eEHX Portal. Only documents folders that are default folders included with eCW are marked per event. These folders include:

- Lab documents
- X-ray
- Consult Notes
- Miscellaneous
- Chart Documents
- Patient Documents
- Referral Notes

TIP

Documents must be marked as Reviewed and Publish to eEHX in order to be uploaded.



To publish documents to eHX, follow the steps below.

1. From the Documents band in the left navigation pane, click the **Patient Documents** icon. The Patient Documents window opens.
2. Highlight a document and click the **Update** button. The Documents Details window opens.
3. Click the Reviewed and Publish to eHX checkboxes.

TIP

The Publish to eEHX box is only available if the following 2 criteria are met:

a. The patient has been enabled for the eEHX Portal.

b. The document has been added to 1 of the designated document folders.

4. Click the **OK** button.

The document will now be uploaded to the eEHX Portal when the **Export Documents** button is clicked on the patient's Patient Hub or during nightly synchronization.

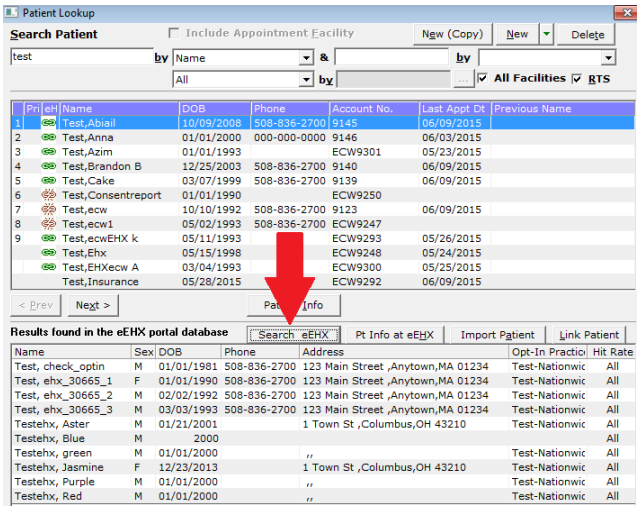
Community Patient Registration

- New patient exists in eEHX

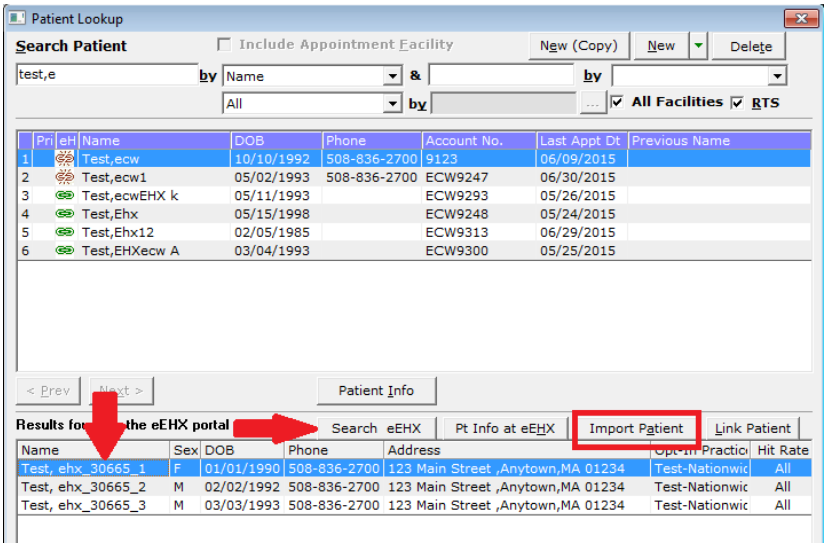
- New patient does not exist in eEHX
- Established patient exists in eEHX
- Established patient does not exist in eEHX
- Established patient in eEHX using check in

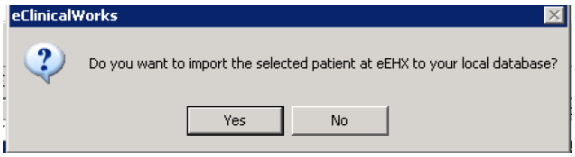
When a New Patient Exists in eEHX: Import Patient

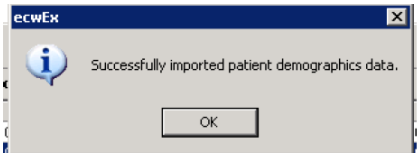
1. Prior to scheduling an appointment, check to see if the patient exists in the eEHX by searching for the patient in the Patient Lookup.
2. To view patient accounts on the eEHX Portal, from the Patient Lookup window, enter the search criteria into the search fields at the top of the window.
3. Click the **Search eEHX** button. The accounts on the eEHX Portal that match the search criteria, but do not exist in or have not been uploaded from eCW to the eEHX Portal, display in the bottom pane.



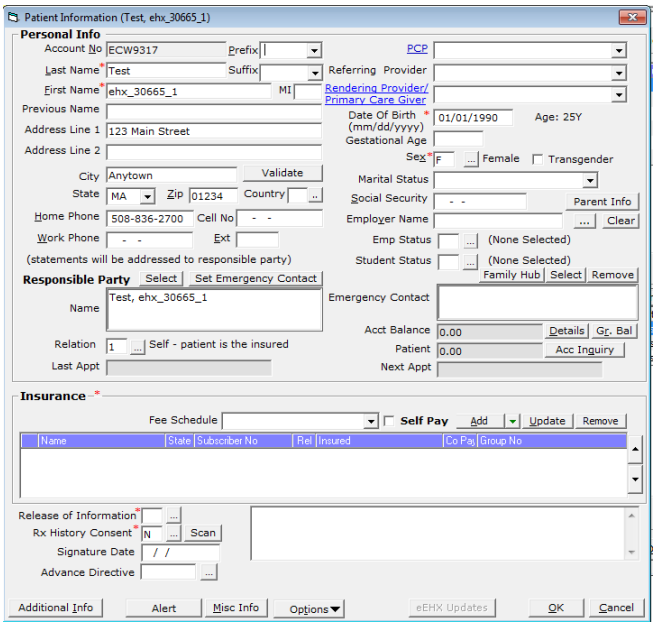
4. If the new patient to your practice already exists in the eEHX, highlight the patient and click the **Import Pt** button. To verify more patient demographic information, click the **Patient Info at eHX** button.







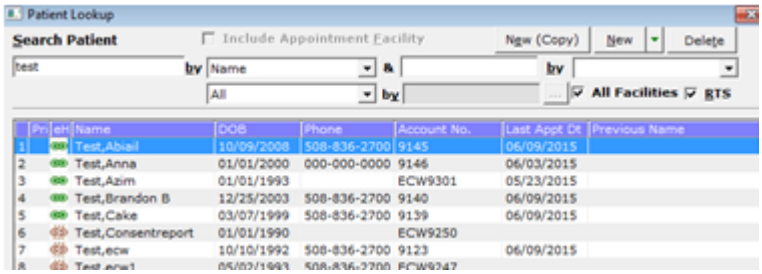
5. The Patient Info window is launched.



6. Confirm and/or update the patient information and click **OK**. The patient is liked in the eEHX and will have a green link in Patient Lookup. Continue with the scheduling the appointment as normal.

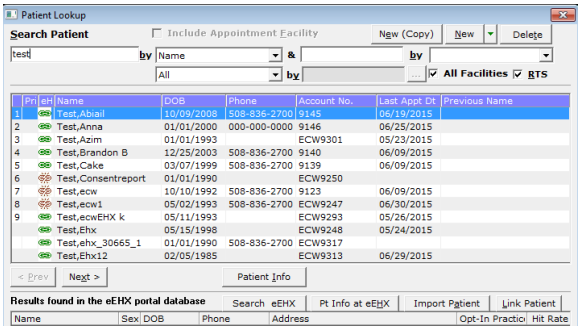
TIP

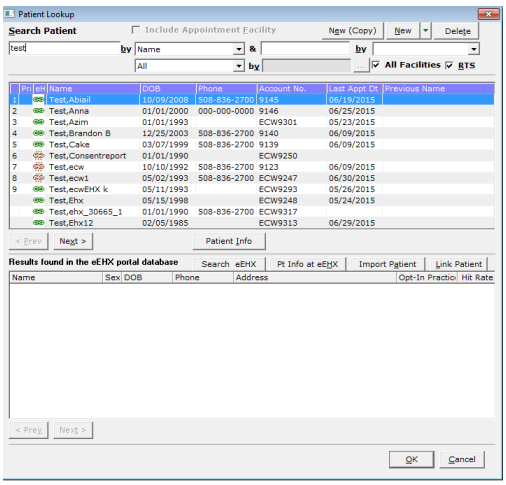
Since the patient already exists in eEHX, the eEHX consent for the patient has been established by the practice that initially obtained consent.



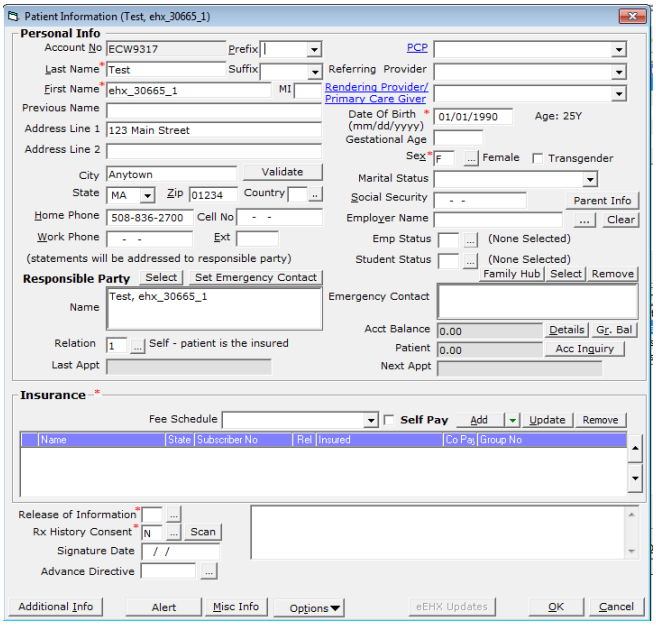
When a New Patient Does Not Exist in the eEHX

7. Prior to scheduling an appointment, check to see if the patient exists in the eEHX by searching for the patient in the Patient Lookup.
8. To view patient accounts on the eEHX Portal, from the Patient Lookup window, enter the search criteria into the search fields at the top of the window.
9. Click the **Search eEHX** button. There should not be any search results returned since the patient does not exist in the eEHX.





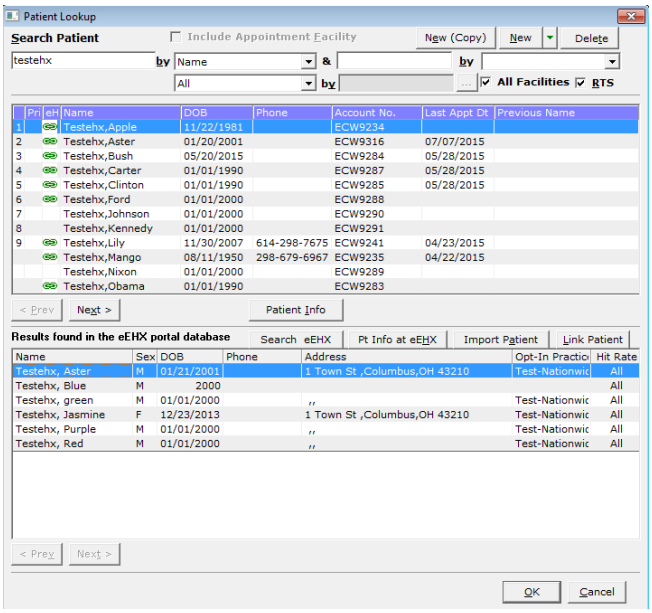
10. If the new patient does not exist in the eEHX, add the patient in Patient Info and click the **OK** button.



When an established patient exists in eEHX: Using Link Patient

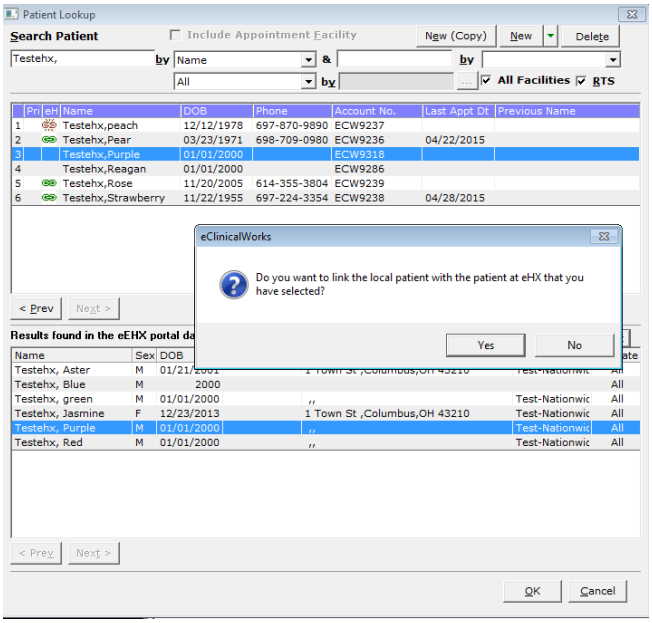
Established patients can be linked to an eEHX existing patient using the Link Pt button on the Patient Lookup window. This will automatically link the established patient in eEHX.

11. Prior to scheduling an appointment, check to see if the patient exists in the eEHX by searching for the patient in the Patient Lookup.
12. To view patient accounts on the eEHX Portal, from the Patient Lookup window, enter the search criteria into the search fields at the top of the window.
13. Click the **Search eEHX** button. The patient from the database should match the search criteria from the eEHX database.



14. If the established patient does exist in eEHX, click the **Link Pt** button. The patient will be linked from your practice to the eEHX patient and create a green link.

15. On the verification window, click **Yes** to confirm that you want to link the 2 patients.



TIP

Since the patient already exists in eEHX, the eEHX consent for the patient has been established by the practice that initially obtained consent.

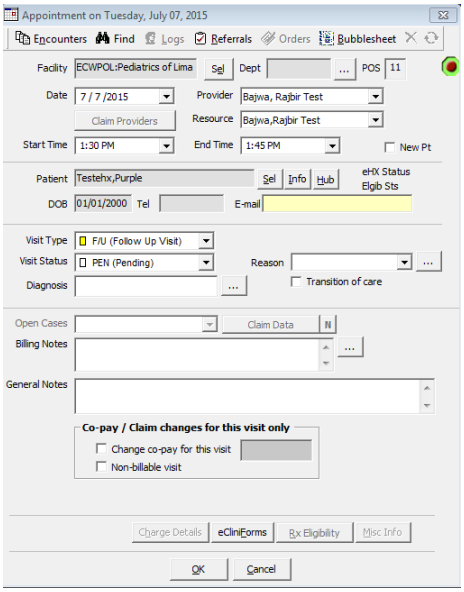
When an Established Patient Does Not Exist in eEHX: Using Arrived

TIP

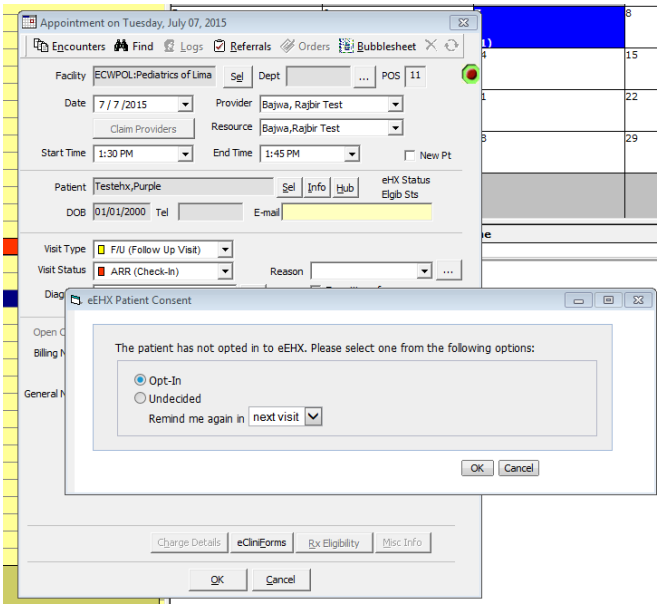
Use this workflow when you go live with eEHX for patients that have an existing scheduled appointment.

From the Appointment window, if the eEHX status does not display a green link, the patient is not linked to the eEHX. The system will check to see if the patient has been enabled whenever an appointment is scheduled for a practice that is using the eEHX Portal. If the patient is enabled, the account needs to be linked. If the patient is not, the new account needs to be created. Follow the steps below to create the new account.

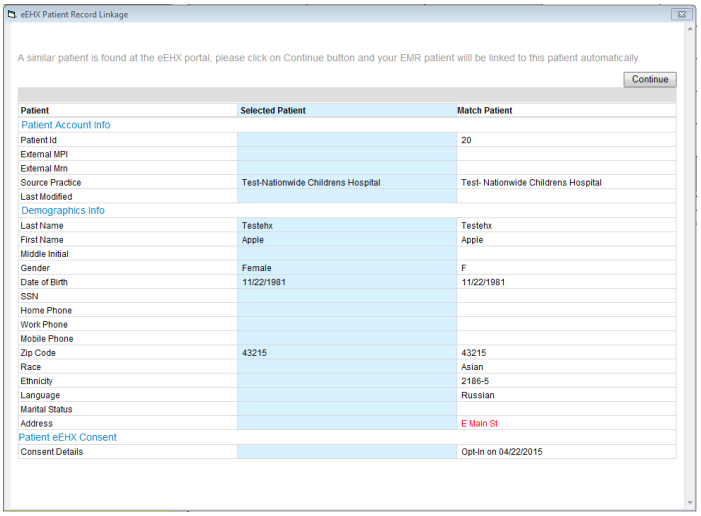
16. In the Appointment window, the eEHX status will not display an icon since the patient has never been linked to eEHX.



17. If the patient is not in the eEHX, the system will ask you to opt-in the patient or ask to be reminded later once the patient is marked as Arrived.

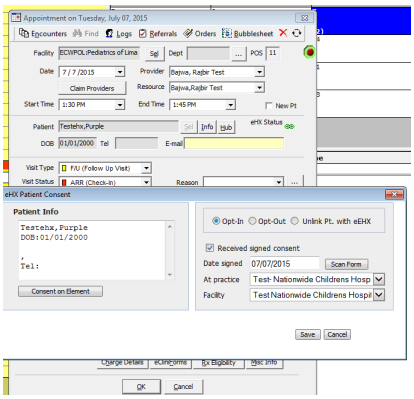


18. If a similar patient match is found on the eEHX, the eEHX Patient Record Linkage window opens.

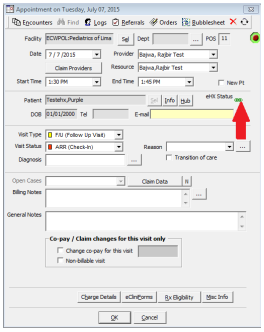


19. Review the patient information on the Patient Record Linkage carefully to confirm the patient is not already in the eEHX.

20. Select **Create New Patient** to add the patient to the eEHX. The will launce and populate the eEHX Consent window. Click the **Save** button.



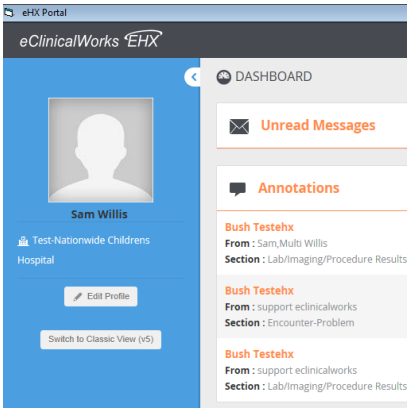
21. The eEHX status will now display a green link icon on the Appointment window.



eEHX Portal

Launching eEHX Portal from EHR

From tools, click **Launch eEHX Browser**. This will launch the eEHX homepage. Make sure your name appears in the Welcome line.



STOP

My Referrals is not used by the eCW eEHX Community!

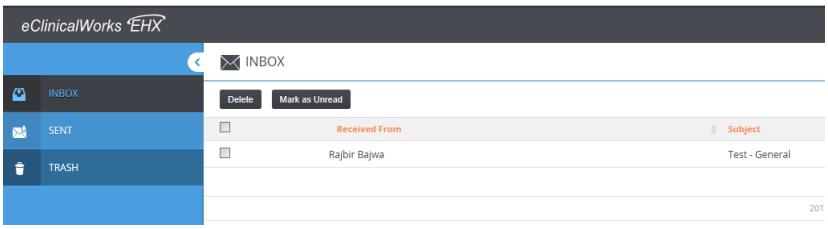
eEHX Messaging should only be used for eEHX Administrator communication. The eEHX Portal has its own internal messaging system and it functions like the message system within the eClinicalWorks application.
The Message section of the eEHX Portal includes:

a. Inbox

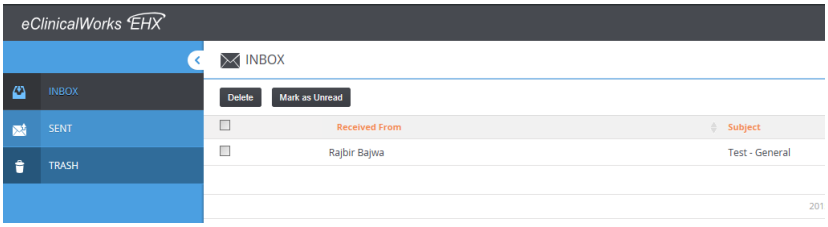
b. Sent messages

c. Deleted messages

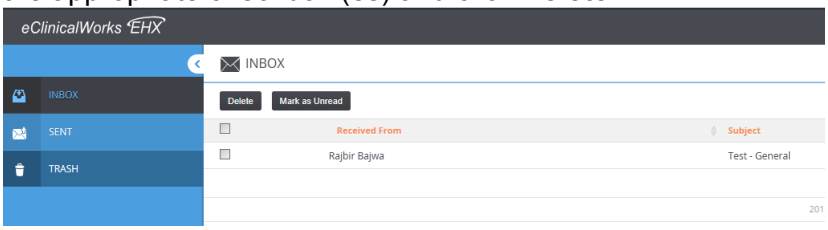
Inbox- Displays all messages that have been sent to you from other eEHX Portal uses. You can send messages from this window by clicking **Compose**. To delete messages, click the checkbox next to the message(s) you want to delete and click **Delete**.



Sent Messages- Displays all messages you have sent to other eEHX Portal users. You can compose and delete message from this window.



Deleted Messages- Displays all sent and received messages that have been deleted. This window holds deleted message in case you want to review them again. To remove them from the system completely, check the appropriate checkbox (es) and click **Delete**.

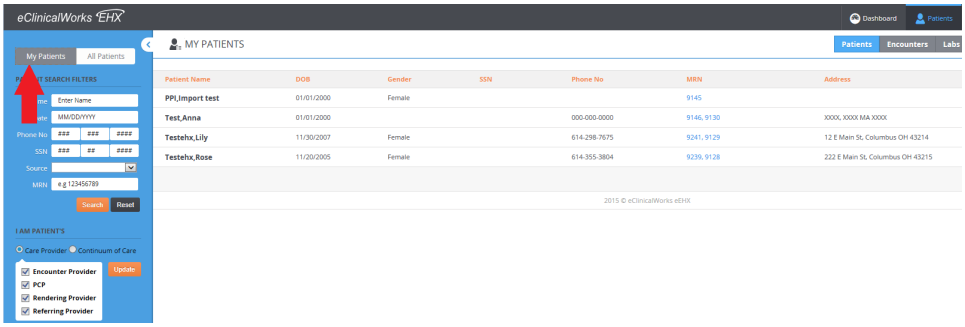


TIP

All messages sent with the system can be accessed only by logging into the eEHX Portal and clicking **Inbox**.

My Patient- the My Patients section allows users to view the records of patients that you have a care relationship (PCP, referring, rendering or Care Provider) with that have been exported to the eEHX Portal.

eHS Tab-The eHX tab lists patients whose eHealth Summaries have been uploaded from the EHR side. Information in this section is organized in descending order by date. Click on any of the following tabs to view related information.

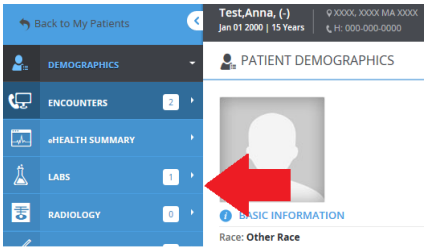


Click anywhere in the row of an eHS to view it. The following information is contained in an eHS:

a. Patient Demographic
b. Allergies
c. Advance Directives
d. Problem list
e. Procedures performed (CPT codes selected)
f. Medications prescribed (inactive medications are only displayed if they are allowed by the community administrator.

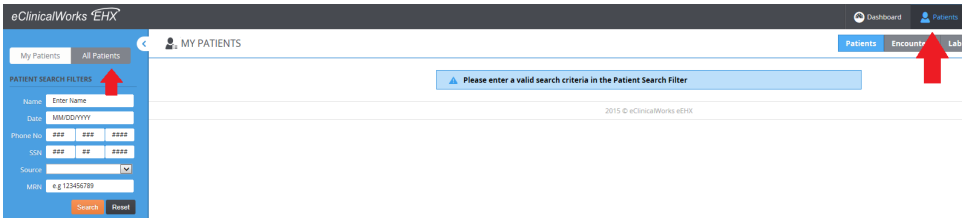
g. Immunizations/injections
h. Vital signs (only categories that have been mapped)
i. Social, family, medical and surgical history
j. Hospitalization
k. Labs/diagnostic imaging (only test names and dates are displayed here. Test results are listed under the Labs/Imaging tab.)
l. People (users that have access to the patient's records.)
m. Organizations (the insurance company listed in the patient's demographics.

Labs/Imaging tab- The Lab Results tab lists patients who have had lab results uploaded. Click anywhere in the row of lab test to view it.

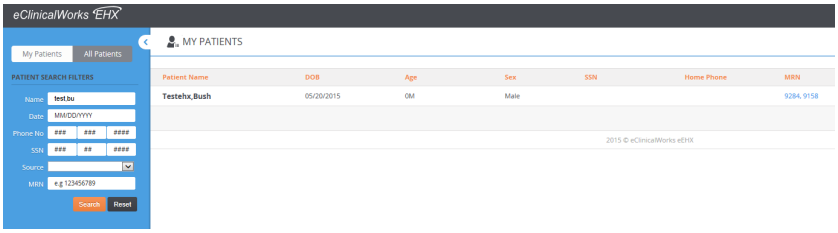


Patient Lookup- Patients can be looked up on the eHX Portal using the Patient Lookup tool. The Patient Search tab allows you to search for patients that have been eEHX enabled.

1. To find a patient, click the **All Patients** link in the left pane. The Patient Search window displays.



2. Select one of the following search criteria from By drop-down list:
   a. **Name** to search by name.
   b. **DOB** to search by date of birth in the mm/dd/yyyy format.
   c. **Tel** to search by telephone number.
   d. **MRN** to search by medical record number.
3. Click the **Go** button. The following window displays with the results.



4. Select a patient by clicking in the row. One of the following windows displays, depending on your access permission:

   Access Permission: yes- If you have permission to access the patient's information, the window displays with general demographics information about the patient. Only users that have a relationship to a patient have access to their records. Users are related to patient if they are:

   a. The primary provider

   b. The referring provider

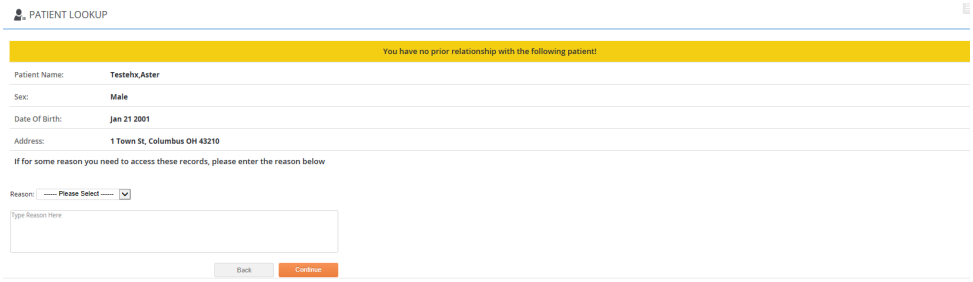
   c. The rendering provider

   d. In the database where the encounter was made

   e. A referred provider

   Click on any of the tabs at the top of the window for more detailed information on that subject.

   Access Permission: no- If you do not have permission to access the patient's information, the following window displays:



STOP

If necessary, you can still access information outside of your permssion level.

a. You must state the reason for accessing the patient's information from the Reason drop-down list.

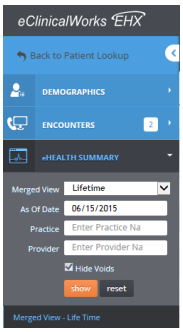
b. Click **Continue** to access a patient's information. If you select *Other*, be sure to type the reason in the **If Other** field.

The General tab opens with the patient's demographic information displayed.

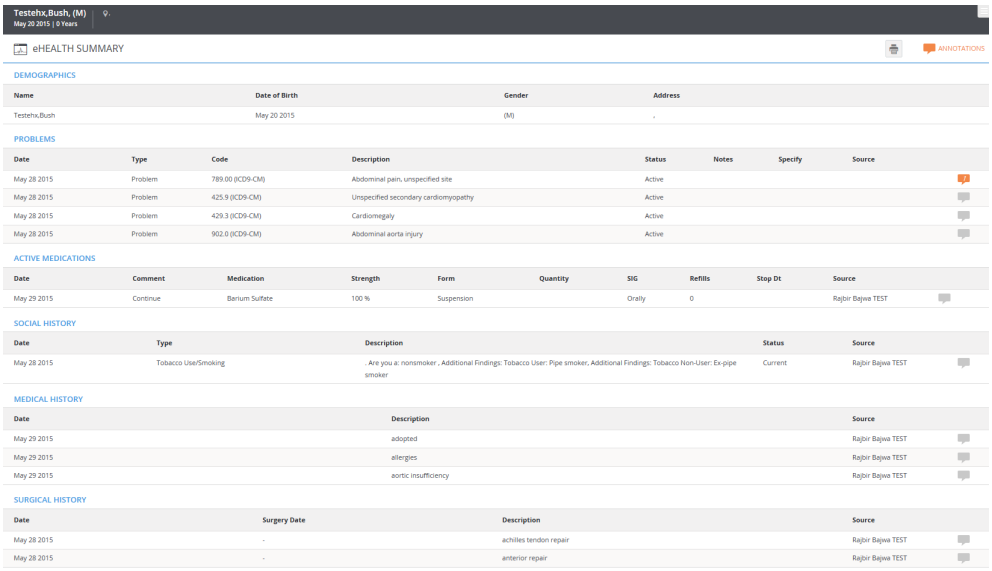
View Merged eHealth Summary (CCD)

Once a patient has been found, their merged CCDs can be viewed. To view merged CCD, follow the steps below.

1. Click the **eHealth Summary** tab. The eHealth Summaries options display.



2. Select a time frame from the Merged View drop-down list.
3. Enter the date which you want to apply the time frame from the **As of Date** field in the mm/dd/yyyy format.
4. To view a merged CCD for a specific practice, select a practice from the **Practice** drop-down list.
5. To view merged CCD for a specific provider, select a provider from the **Provider** drop-down list.
6. To hide voids in the results, click the **Hide Voids** checkbox.
7. Click the **Go** button. The eHealth Summary-Merged View displays.



8. You can save or print the summary.

Viewing Documents

Any documents attached to a patient on the eEHX Portal can be viewed by clicking the Documents tab. The eEHX will contain documents including: consult notes, discharge summaries, ED visits, and documents from other connected practices connected to the eEHX.

1. To hide voids in the results, check the **Hide Voids** checkbox.