



Health Information Exchange

Front Desk User Guide





















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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.

Patient Lookup						
Search Patient <input type="checkbox"/> Include Appointment Facility <input type="button" value="New (Copy)"/> <input type="button" value="New"/> <input type="button" value="Delete"/>						
test by Name & by						
All by <input checked="" type="checkbox"/> All Facilities <input checked="" type="checkbox"/> RTS						
Pr	eHx	Name	DOB	Phone	Account No.	Last Appt Dt
1		Test,Abigail	10/09/2008	508-836-2700	9145	06/09/2015
2		Test,Anna	01/01/2000	000-000-0000	9146	06/03/2015
3		Test,Azim	01/01/1993		ECW9301	05/23/2015
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015
6		Test,Consentreport	01/01/1990		ECW9250	
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247	
9		Test,ecwEHX k	05/11/1993		ECW9293	05/26/2015
		Test,Ehx	05/15/1998		ECW9248	05/24/2015
		Test,Ehxecw A	03/04/1993		ECW9300	05/25/2015
		Test,Insurance	05/28/2015		ECW9292	06/09/2015

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.


Appointment on Tuesday, June 09, 2015

Encounters Find Logs Referrals Orders Bubblesheet

Facility: ECWPOL:Pediatrics of Lima Sel Dept: POS: 11

Date: 6/9/2015 Provider: Bajwa, Rajbir Test Resource: Bajwa, Rajbir Test

Start Time: 3:45 PM End Time: 4:15 PM ☐ New Pt

Patient: Miller, John eHX Status: 

DOB: 06/01/2015 Tel: 222-222-2222 E-mail:

Visit Type: NP (New Patient) Visit Status: ARR (Check-in) Reason: Transition of care

Test, Cake, 16 Y, F Sel Info Hub Allergies

123 Main Street
Anytown, MA 01234
H: 508-836-2700
DOB: 03/07/1999
testcake@cake.com
eHX Status: 

Wt 06/02/15: 174 lbs.
Appt(L): 06/09/15(MW)
PCP: Bajwa,
Language: English
Translator: No

Medical Summary | Alerts | Labs | DI | Procedures | Gr

SF

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 screenshot shows the 'Patient Lookup' window. The top section is for searching the local database, with 'test' entered in the search field. Below this is a table of local search results. The bottom section is for searching the eEHX portal database, with a 'Search eEHX' button highlighted by a red arrow. Below this is a table of eEHX search results.

Pr	est	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,Abigail	10/09/2008	508-836-2700	9145	06/09/2015	
2		Test,Anna	01/01/2000	000-000-0000	9146	06/03/2015	
3		Test,Azim	01/01/1993		ECW9301	05/23/2015	
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015	
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015	
6		Test,Consentreport	01/01/1990		ECW5250		
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247		
9		Test,ecwEHX k	05/11/1993		ECW9293	05/26/2015	
		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
		Test,EHXecw A	03/04/1993		ECW9300	05/25/2015	
		Test,Insurance	05/28/2015		ECW9292	06/09/2015	

Name	Sex	DOB	Phone	Address	Opt-In Practic	Hit Rate
Test, check_optin	M	01/01/1981	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_1	F	01/01/1990	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_2	M	02/02/1992	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_3	M	03/03/1993	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Testehx, Aster	M	01/21/2001		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Blue	M	2000			Test-Nationwic	All
Testehx, green	M	01/01/2000			Test-Nationwic	All
Testehx, Jasmine	F	12/23/2013		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Purple	M	01/01/2000			Test-Nationwic	All
Testehx, Red	M	01/01/2000			Test-Nationwic	All

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.

Patient Lookup

Search Patient ☐ Include Appointment Facility

test by Name & by

All by ☒ All Facilities ☒ RTS

Pr	Pat	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1	Test,Abail	10/09/2008	508-836-2700	0145		06/09/2015	
2	Test,Anna	01/01/2000	000-000-0000	9146		06/03/2015	
3	Test,Azim	01/01/1993	ECW9301			05/23/2015	
4	Test,Brandon B	12/25/2003	508-836-2700	9140		06/09/2015	
5	Test,Cake	03/07/1999	508-836-2700	9139		06/09/2015	
6	Test,Consentreport	01/01/1990	ECW9250				
7	Test,ecw	10/10/1992	508-836-2700	9123		06/09/2015	
8	Test,ecw1	05/02/1993	508-836-2700	ECW9247			
9	Test,ecwEHX k	05/11/1993	ECW9293			05/26/2015	
	Test,Ehx	05/15/1996	ECW9248			05/24/2015	
	Test,EHXecw A	03/04/1993	ECW9300			05/25/2015	
	Test,Insurance	05/28/2015	ECW9292			06/09/2015	

< Prev Next >

Results found in the eEHX portal database

Name	Sex	DOB	Phone	Address	Opt-In Practic	Hit Rate
Test, check_optin	M	01/01/1981	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_1	F	01/01/1990	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_2	M	02/02/1992	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_3	M	03/03/1993	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Testehx, Aster	M	01/21/2001		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Blue	M	2000			Test-Nationwic	All
Testehx, green	M	01/01/2000			Test-Nationwic	All
Testehx, Jasmine	F	12/23/2013		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Purple	M	01/01/2000			Test-Nationwic	All
Testehx, Red	M	01/01/2000			Test-Nationwic	All

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

PATIENT LOOKUP

You have no prior relationship with the following patient!

Patient Name: Testehx,Aster

Sex: Male

Date Of Birth: Jan 21 2001

Address: 1 Town St, Columbus OH 43210

If for some reason you need to access these records, please enter the reason below

Reason:

Type Reason Here

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.

The screenshot shows the 'Patient Lookup' window. The top section is for searching the practice database, with fields for Name, DOB, and Phone. The bottom section shows results found in the eEHX portal database. A red arrow points to the 'Link Patient' button in the bottom right corner of the window.

Pr	eH	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test, Cake	03/07/1999		9162		

Name	Sex	DOB	Phone	Address	Opt-In Practice	Rate
Test, Cake	F	03/07/1999	508-836-2700	123 Main Street, Anytown, MA 01234	Test- Nationw	

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.

Patient Lookup

Search Patient ☐ Include Appointment Facility

testehx Name

Active ☒ All Facilities ☒ GTS

Pr	eh	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Testehx,Aster	01/21/2001		9132		
2		Testehx,Blue	01/01/2000		9153		
3		Testehx,Bush	01/01/1990		9158	05/28/2015	
4		Testehx,green	01/01/2000		9154	05/29/2015	
5		Testehx,Jasmine	12/23/2013		9131		
6		Testehx,Lily	11/30/2007		9129	04/22/2015	
7		Testehx,Lotus	04/22/1971		9130	04/28/2015	
8		Testehx,Mango	08/11/1950	298-679-6967	9135		
9		Testehx,Purple	01/01/2000		9157		
		Testehx,Red	01/01/2000		9155	05/29/2015	
		Testehx,Rose	11/20/2005		9128	04/22/2015	
		Testehx,Yellow	01/01/2000		9156		

< Prev Next > Patient Info

Results found in the eEHX portal database Search eEHX Pt Info at eEHX **Import Patient** Link Patient

Name	Sex	DOB	Phone	Address	Opt-In Practio	Hit Rate
Testehx, Apple	F	11/22/1981		E Main St ,Columbus,OH 43215	Test- Nationwi	All
Testehx, Carter	M	01/01/1990		"	Test- Nationwi	All
Testehx, Clinton	M	01/01/1990		"	Test- Nationwi	All
Testehx, Ford	M	01/01/2000		"	Test- Nationwi	All
Testehx, Obama	M	01/01/1990		"	Test- Nationwi	All
Testehx, peach	F	1978				All
Testehx, Pear	F	03/23/1971	698-709-0980	E Main St ,Columbus,OH 43215	Test- Nationwi	All
Testehx, Strawberry	M	11/22/1955	697-224-3354	222 W Town St ,Columbus,OH 43211	Test- Nationwi	All

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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.

Patient Hub (Testehx, Bush)

Labs	DI	Procedures	Imm/T.Inj	Referrals	Allergies	CDSS	Alerts	Notes
<p>Testehx, Bush Set Info</p> <p>Home: Work: Cell: Email: Insurance: PCP: Rendering Pr:</p> <p>DOB: 01/01/1990 Age: 25 Y Sex: M Advance Directive: Account No: 9158</p> <p>Patient Balance: \$0.00 Account Balance: \$0.00</p> <p>Collection Status: Assigned To:</p> <p>Last Appt: 05/28/2015 02:15 PM Next Appt: Bumped Appts: NONE</p> <p>Facility: Test-Nationwide Childrens Hospital Facility: Case Manager Hx:</p> <p>Buttons: New Appt, New Tel Enc, Print Label(s), Billing Alert, Patient Docs, Letters, Encounters, Medical Summary, Rx, Progress Notes, eClinForms, Devices, Problem List, Medical Record, Send eMsg, Account Inquiry, Guarantor Bal, Consult Notes, Letter Logs, Fax Logs, Action, Flowsheets, Billing Logs, eHX Consent, Export eHS, Export Labs, Export Documents</p>								

Overview | **Testehx, Bush** | Global Alerts | Advance | Problem List

789.00
425.9
429.3
902.0

Current Medications
Flagyl 250
Nitro-Bid 2
Liquid Polib
Allergies
Abarelix
A-200 Maxi
12 Hour Co
Immuniza
Therapeut

- 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.
- Exporting Labs- click the **Export Labs** button from the Patient Hub to upload reviewed lab and diagnostic imaging test results to the eEHX Portal.
- Exporting Patient Documents- Click the **Export Document** button to upload patient documents to the eHS Portal.

Patient Hub (Testehx, Bush)

Labs	DI	Procedures	Imm/T.Inj	Referrals	Allergies	CDSS	Alerts	Notes
<p>Testehx, Bush Set Info</p> <p>Home: Work: Cell: Email: Insurance: PCP: Rendering Pr:</p> <p>DOB: 01/01/1990 Age: 25 Y Sex: M Advance Directive: Account No: 9158</p> <p>Patient Balance: \$0.00 Account Balance: \$0.00</p> <p>Collection Status: Assigned To:</p> <p>Last Appt: 05/28/2015 02:15 PM Next Appt: Bumped Appts: NONE</p> <p>Facility: Test-Nationwide Childrens Hospital Facility: Case Manager Hx:</p> <p>Buttons: New Appt, New Tel Enc, Print Label(s), Billing Alert, Patient Docs, Letters, Encounters, Medical Summary, Rx, Progress Notes, eClinForms, Devices, Problem List, Medical Record, Send eMsg, Account Inquiry, Guarantor Bal, Consult Notes, Letter Logs, Fax Logs, Action, Flowsheets, Billing Logs, eHX Consent, Export eHS, Export Labs, Export Documents</p>								

Overview | **Testehx, Bush** | Global Alerts | Advance | Problem List

789.00
425.9
429.3
902.0

Current Medications
Flagyl 250
Nitro-Bid 2
Liquid Polib
Allergies
Abarelix
A-200 Maxi
12 Hour Co
Immuniza
Therapeut

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.

Search Patient						
Include Appointment Facility						
New (Copy) New Delete						
testehx		by	Name	&	by	
All		by				
						All Facilities GTS
Pri	eh	Name	DOB	Phone	Account No.	Last Appt Dt
1	99	Testehx, Apple	11/22/1981		ECW9234	
2	99	Testehx, Apple	01/20/2001		ECW9316	07/07/2015

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.

Patient Medical Summary (Test, Cake)

Test, Cake
 123 Main Street, Anytown, MA 01234
 DOB: 03/07/1999 Age: 16 Y Sex: Female
 Home: 508-836-2700
 Work: 614-258-9632
 Cell:
 Email: testcake@cake.com
 Allergies: Penicillamine

Primary Insurance: Aetna
PCP: Dr. Rajbir Test Bajwa
Account No: 9139

Medical History

Active Problem List

	Code	Name	Onset Date	Specify	Notes	Added On	Modified On	Modified By
Remove	441.3	Abdominal aneurysm, ruptured				10/29/2014	05/18/2015	edclinicalworks, support
Remove	441.4	Abdominal aneurysm without mention of rupture				12/10/2014	06/05/2015	Bajwa, Rajbir Test
Remove	362.01	Background diabetic retinopathy				06/03/2015	06/05/2015	Bajwa, Rajbir Test

Past Medical History

Abnormality in fetal heart rate or rhythm, unspecified as to episode of care or not applicable
 Abscess of eyelid
 Accident caused by blasting materials

Medications

Name strength formulation, Sig: take route frequency

Adderall 10 MG Tablet, Sig: as directed Orally Once a day Start Date: 11/03/2014
 Adderall 10 MG Tablet, Sig: as directed Orally Once a day Start Date: 11/03/2014
 Gentamicin Sulfate 40 MG/ML Solution, Sig: as directed Injection Twice a day Start Date: 06/03/2015
 Flexbumin 5 % Solution, Sig: Intravenous
 Clopidogrel Bisulfate 75 MG Tablet, Sig: 1 tablet Orally Once a day Start Date: 11/07/2014

Surgical History

Date	Reason
3/24/90	ANESTH, CORNEAL TRANSPLANT
	ANESTH, NOSE/SINUS SURGERY

Printer Friendly Version Print... Fax... **eHX Options** New Tel Encounter Close

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

- 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.
- 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.

The screenshot shows the 'Document Details' window for patient Testehx, Bush, 25 Y, M. The window is divided into several sections. At the top, there's a header with patient information and a 'Billing Alert' section. Below this, there's a 'Document Details' section with fields for Name, Description, Tag, Scanned By, and Attached To. To the right of these fields is a 'Progress Notes' section with a 'Logs' button. In the center, there's an 'Options' section with checkboxes for 'Reviewed', 'Reviewed Doc and Lab', 'High Priority', and 'Publish to eHX'. Red arrows point to the 'Reviewed' and 'Publish to eHX' checkboxes. Below the 'Options' section is an 'Assigned To' dropdown menu and a 'Facility' dropdown menu. At the bottom, there's an 'Attach To Patient' button and a checkbox for 'Make this as document name'. On the far right, there's a sidebar with buttons for 'Overview', 'DRTLA', 'Global Alerts', 'Advance Direct', 'Problem List', and a list of documents with their status (e.g., '789.00 Abd uns', '425.9 Uns cart').

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.

Patient Lookup

Search Patient ☐ Include Appointment Facility

test by Name & by ☒ All Facilities ☒ RTS

Pri	Est	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,Abail	10/09/2008	508-836-2700	9145	06/09/2015	
2		Test,Anna	01/01/2000	000-000-0000	9146	06/03/2015	
3		Test,Azim	01/01/1993		ECW9301	05/23/2015	
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015	
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015	
6		Test,Consentreport	01/01/1990		ECW9250		
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247		
9		Test,ecwEHX k	05/11/1993		ECW9293	05/26/2015	
		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
		Test,EHXecw A	03/04/1993		ECW9300	05/25/2015	
		Test,Insurance	05/28/2015		ECW9292	06/09/2015	

< Prev Next >

Results found in the eEHX portal database

Name	Sex	DOB	Phone	Address	Opt-In Practi	Hit Rate
Test, check_optin	M	01/01/1981	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_1	F	01/01/1990	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_2	M	02/02/1992	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_3	M	03/03/1993	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Testehx, Aster	M	01/21/2001		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Blue	M	2000			Test-Nationwic	All
Testehx, green	M	01/01/2000			Test-Nationwic	All
Testehx, Jasmine	F	12/23/2013		1 Town St ,Columbus,OH 43210	Test-Nationwic	All
Testehx, Purple	M	01/01/2000			Test-Nationwic	All
Testehx, Red	M	01/01/2000			Test-Nationwic	All

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.

Patient Lookup

Search Patient ☐ Include Appointment Facility New (Copy) New Delete

test,e by Name & by

All by ☒ All Facilities ☒ RTS

Pri	eH	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
2		Test,ecw1	05/02/1993	508-836-2700	ECW9247	06/30/2015	
3		Test,ecwEHX k	05/11/1993		ECW9293	05/26/2015	
4		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
5		Test,Ehx12	02/05/1985		ECW9313	06/29/2015	
6		Test,EHXecw A	03/04/1993		ECW9300	05/25/2015	

< Prev Next > **Patient Info**

Results for the eEHX portal Search eEHX Pt Info at eEHX **Import Patient** Link Patient

Name	Sex	DOB	Phone	Address	Opt-in Practice	Hit Rate
Test, ehx_30665_1	F	01/01/1990	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_2	M	02/02/1992	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All
Test, ehx_30665_3	M	03/03/1993	508-836-2700	123 Main Street ,Anytown,MA 01234	Test-Nationwic	All

eClinicalWorks

Do you want to import the selected patient at eEHX to your local database?

ecwEx

Successfully imported patient demographics data.

5. The Patient Info window is launched.

Patient Information (Test, ehx_30665_1)

Personal Info

Account No ECW9317 Prefix Referring Provider PCP

Last Name Test Suffix

First Name Test, ehx_30665_1 MI Referring Provider/Primary Care Giver

Previous Name

Address Line 1 123 Main Street Date Of Birth 01/01/1990 Age: 25Y

Address Line 2 Gestational Age

City Anytown State MA Zip 01234 Country Sex F Female Transgender

Home Phone 508-836-2700 Cell No Marital Status

Work Phone Ext Social Security Parent Info

(statements will be addressed to responsible party)

Responsible Party Select Set Emergency Contact

Name Test, ehx_30665_1

Relation 1 Self - patient is the insured

Last Appt Emergency Contact

Acct Balance 0.00 Details Gr. Bal

Patient 0.00 Acc Inquiry

Next Appt

Insurance

Fee Schedule Self Pay Add Update Remove

Name	State	Subscriber No	Rel	Insured	Co Pay	Group No

Release of Information Rx History Consent N Scan

Signature Date

Advance Directive

Additional Info Alert Misc Info Options eEHX Updates

6. Confirm and/or update the patient information and click **OK**. The patient is linked 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.

The screenshot shows the 'Patient Lookup' window with the search criteria 'Test' entered. The results table is as follows:

Pr	eh	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,Abail	10/09/2008	508-836-2700	9145	06/09/2015	
2		Test,Anna	01/01/2000	000-000-0000	9146	06/03/2015	
3		Test,Azim	01/01/1993		ECW9301	05/23/2015	
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015	
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015	
6		Test,Consentreport	01/01/1990		ECW9250		
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247	06/30/2015	
9		Test,ecwEHX k	05/11/1993		ECW9293	05/24/2015	
10		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
11		Test,ehx_30665_1	01/01/1990	508-836-2700	ECW9317		
12		Test,Ehx12	02/05/1985		ECW9313	06/29/2015	

When a New Patient Does Not Exist in the eEHX

- Prior to scheduling an appointment, check to see if the patient exists in the eEHX by searching for the patient in the Patient Lookup.
- 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.
- Click the **Search eEHX** button. There should not be any search results returned since the patient does not exist in the eEHX.

The screenshot shows the 'Patient Lookup' window with the search criteria 'Test' entered. The results table is as follows:

Pr	eh	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,Abail	10/09/2008	508-836-2700	9145	06/19/2015	
2		Test,Anna	01/01/2000	000-000-0000	9146	06/25/2015	
3		Test,Azim	01/01/1993		ECW9301	05/23/2015	
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015	
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015	
6		Test,Consentreport	01/01/1990		ECW9250		
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247	06/30/2015	
9		Test,ecwEHX k	05/11/1993		ECW9293	05/24/2015	
10		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
11		Test,ehx_30665_1	01/01/1990	508-836-2700	ECW9317		
12		Test,Ehx12	02/05/1985		ECW9313	06/29/2015	

Buttons: < Prev, Next >, Patient Info

Results found in the eEHX portal database: Search eEHX, Pt Info at eEHX, Import Patient, Link Patient

Table headers: Name, Sex, DOB, Phone, Address, Opt-In, Practi, Hit Rate

The screenshot shows the 'Patient Lookup' window with the search criteria 'Test' entered. The results table is as follows:

Pr	eh	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Test,Abail	10/09/2008	508-836-2700	9145	06/19/2015	
2		Test,Anna	01/01/2000	000-000-0000	9146	06/25/2015	
3		Test,Azim	01/01/1993		ECW9301	05/23/2015	
4		Test,Brandon B	12/25/2003	508-836-2700	9140	06/09/2015	
5		Test,Cake	03/07/1999	508-836-2700	9139	06/09/2015	
6		Test,Consentreport	01/01/1990		ECW9250		
7		Test,ecw	10/10/1992	508-836-2700	9123	06/09/2015	
8		Test,ecw1	05/02/1993	508-836-2700	ECW9247	06/30/2015	
9		Test,ecwEHX k	05/11/1993		ECW9293	05/24/2015	
10		Test,Ehx	05/15/1998		ECW9248	05/24/2015	
11		Test,ehx_30665_1	01/01/1990	508-836-2700	ECW9317		
12		Test,Ehx12	02/05/1985		ECW9313	06/29/2015	

Buttons: < Prev, Next >, Patient Info

Results found in the eEHX portal database: Search eEHX, Pt Info at eEHX, Import Patient, Link Patient

Table headers: Name, Sex, DOB, Phone, Address, Opt-In, Practi, Hit Rate

Buttons: OK, Cancel

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.

Pr	eH	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1		Testehx, Apple	11/22/1981		ECW9234		
2		Testehx, Aster	01/20/2001		ECW9316	07/07/2015	
3		Testehx, Bush	05/20/2015		ECW9284	05/28/2015	
4		Testehx, Carter	01/01/1990		ECW9287	05/28/2015	
5		Testehx, Clinton	01/01/1990		ECW9285	05/28/2015	
6		Testehx, Ford	01/01/2000		ECW9288		
7		Testehx, Johnson	01/01/2000		ECW9290		
8		Testehx, Kennedy	01/01/2000		ECW9291		
9		Testehx, Lily	11/30/2007	614-298-7675	ECW9241	04/23/2015	
		Testehx, Mango	08/11/1950	298-679-6967	ECW9235	04/22/2015	
		Testehx, Nixon	01/01/2000		ECW9289		
		Testehx, Obama	01/01/1990		ECW9283		

Name	Sex	DOB	Phone	Address	Opt-In Practic	Hit Rate
Testehx, Aster	M	01/21/2001		1 Town St, Columbus, OH 43210	Test-Nationwid	All
Testehx, Blue	M	2000			Test-Nationwic	All
Testehx, green	M	01/01/2000			Test-Nationwic	All
Testehx, Jasmine	F	12/23/2013		1 Town St, Columbus, OH 43210	Test-Nationwic	All
Testehx, Purple	M	01/01/2000			Test-Nationwic	All
Testehx, Red	M	01/01/2000			Test-Nationwic	All

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.

The screenshot shows the 'Patient Lookup' window with a search for 'Testehx'. A list of patients is displayed, including Testehx, peach, Testehx, Pear, Testehx, Purple, Testehx, Reagan, Testehx, Rose, and Testehx, Strawberry. A confirmation dialog box from eClinicalWorks is overlaid, asking: 'Do you want to link the local patient with the patient at eHX that you have selected?'. The dialog has 'Yes' and 'No' buttons. Below the dialog, a table shows results found in the eEHX portal:

Name	Sex	DOB	Address	City	State	Zip	Test-Nationwic	All
Testehx, Aster	M	01/21/2001	1 Town St., Columbus, OH	43210			Test-Nationwic	All
Testehx, Blue	M	2000					Test-Nationwic	All
Testehx, green	M	01/01/2000					Test-Nationwic	All
Testehx, Jasmine	F	12/23/2013	1 Town St., Columbus, OH	43210			Test-Nationwic	All
Testehx, Purple	M	01/01/2000					Test-Nationwic	All
Testehx, Red	M	01/01/2000					Test-Nationwic	All

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.

Appointment on Tuesday, July 07, 2015

Facility: ECWPOL-Pediatrics of Lima | Sgl: | Dept: | POS: 11

Date: 7/7/2015 | Provider: Bajwa, Rajbir Test | Resource: Bajwa, Rajbir Test

Start Time: 1:30 PM | End Time: 1:45 PM | New Pt

Patient: Testehx, Purple | Sel | Info | Hub | eHX Status: Elig Sts

DOB: 01/01/2000 | Tel: | E-mail:

Visit Type: FUI (Follow Up Visit) | Visit Status: PEN (Pending) | Reason: | Transition of care

Open Cases: | Claim Data: | Billing Notes: | General Notes:

Co-pay / Claim changes for this visit only

☐ Change co-pay for this visit | ☐ Non-billable visit

Charge Details | eClnForms | Bx Eligibility | Misc Info

OK | Cancel

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.

Appointment on Tuesday, July 07, 2015

Facility: ECWPOL-Pediatrics of Lima | Sgl: | Dept: | POS: 11

Date: 7/7/2015 | Provider: Bajwa, Rajbir Test | Resource: Bajwa, Rajbir Test

Start Time: 1:30 PM | End Time: 1:45 PM | New Pt

Patient: Testehx, Purple | Sel | Info | Hub | eHX Status: Elig Sts

DOB: 01/01/2000 | Tel: | E-mail:

Visit Type: FUI (Follow Up Visit) | Visit Status: ARR (Check-in) | Reason: | Transition of care

Diag: eEHX Patient Consent

The patient has not opted in to eEHX. Please select one from the following options:

☒ Opt-In | ☐ Undecided

Remind me again in: next visit

OK | Cancel

Charge Details | eClnForms | Bx Eligibility | Misc Info

OK | Cancel

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

A similar patient is found at the eEHX portal, please click on Continue button and your EMR patient will be linked to this patient automatically.

Continue

Patient	Selected Patient	Match Patient
Patient Account Info		
Patient Id		20
External MPI		
External Mm		
Source Practice	Test-Nationwide Childrens Hospital	Test-Nationwide Childrens Hospital
Last Modified		
Demographics Info		
Last Name	Testehx	Testehx
First Name	Apple	Apple
Middle Initial		
Gender	Female	F
Date of Birth	11/22/1981	11/22/1981
SSN		
Home Phone		
Work Phone		
Mobile Phone		
Zip Code	43215	43215
Race		Asian
Ethnicity		2186-5
Language		Russian
Marital Status		
Address		E Main St
Patient eEHX Consent		
Consent Details		Opt-In on 04/22/2015

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.

Appointment on Tuesday, July 07, 2015

Facility: RCW POL Pediatrics of Lima | Dept: POS 11

Date: 7/7/2015 | Provider: Rajwa, Rajar Test | Resource: Rajwa, Rajar Test

Start Time: 1:30 PM | End Time: 1:45 PM | New Pt: ☐

Patient: Testehx, Purple | DOB: 01/01/2000 | Tel: | E-mail: | eEHX Status: **Opt-In**

Visit Type: ☒ F/U (Follow up Visit) | Visit Status: ☒ ASB (Check-in) | Reason: | Diagnosis: | Transition of care: ☐

eEHX Patient Consent

Patient Info
Testehx, Purple
DOB: 01/01/2000
Tel: | E-mail: | Consent on Element:

Consent Status
☒ Opt-In ☐ Opt-Out ☐ Unlink Pt. with eEHX
☒ Received signed consent
Date signed: 07/07/2015 | Scan Form:
At practice: Test-Nationwide Childrens Hosp | Facility: Test-Nationwide Childrens Hosp

Save **Cancel**

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

Appointment on Tuesday, July 07, 2015

Facility: RCW POL Pediatrics of Lima | Dept: POS 11

Date: 7/7/2015 | Provider: Rajwa, Rajar Test | Resource: Rajwa, Rajar Test

Start Time: 1:30 PM | End Time: 1:45 PM | New Pt: ☐

Patient: Testehx, Purple | DOB: 01/01/2000 | Tel: | E-mail: | eEHX Status: **Opt-In** (green link icon)

Visit Type: ☒ F/U (Follow up Visit) | Visit Status: ☒ ASB (Check-in) | Reason: | Diagnosis: | Transition of care: ☐

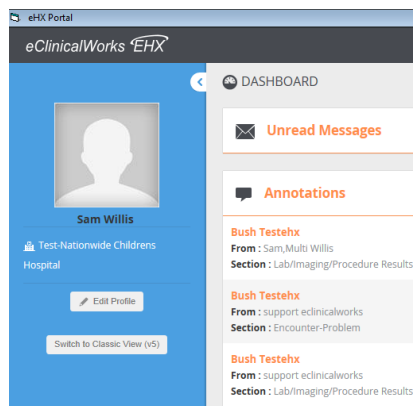
Open Claims: | Billing Notes: | General Notes: | Co-pay / Claim changes for this visit only: ☐ Change co-pay for this visit ☐ Non-billable visit

Save **Cancel**

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.



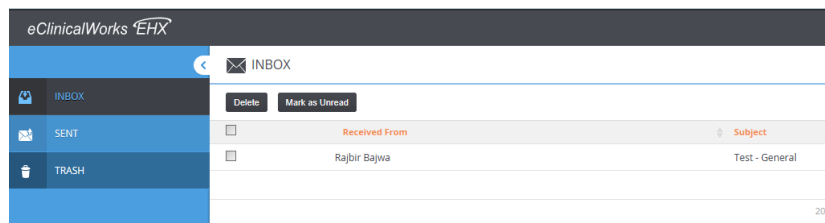
STOP

My Referrals is not used by the eCW eEHX Community!

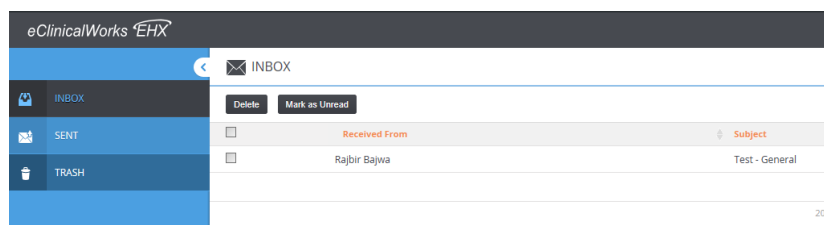
eEHX Messaging should only be used for eEHX Administrator communication. The eEHX Portal has its own internal messaging system and it functions like the message system within the eClinicalWorks application. The Message section of the eEHX Portal includes:

- Inbox
- Sent messages
- Deleted messages

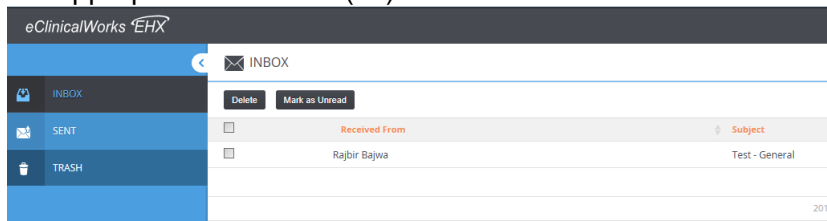
Inbox- Displays all messages that have been sent to you from other eEHX Portal users. You can send messages from this window by clicking **Compose**. To delete messages, click the checkbox next to the message(s) you want to delete and click **Delete**.



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**.

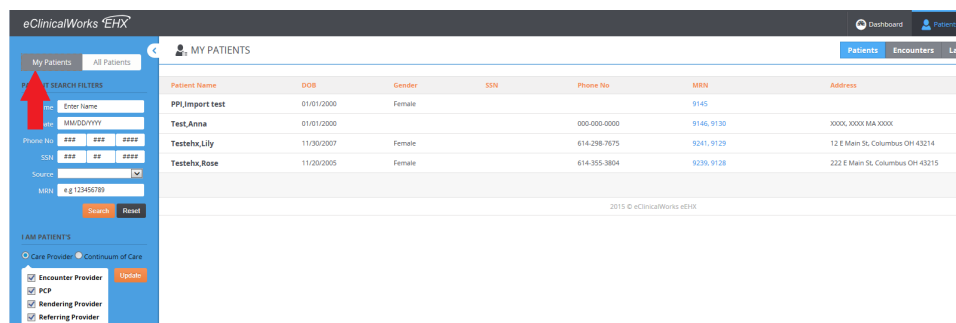


TIP

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.

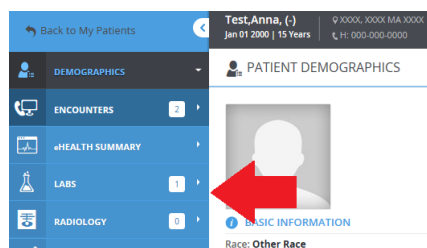


Click anywhere in the row of an eHS to view it. The following information is contained in an eHS:

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

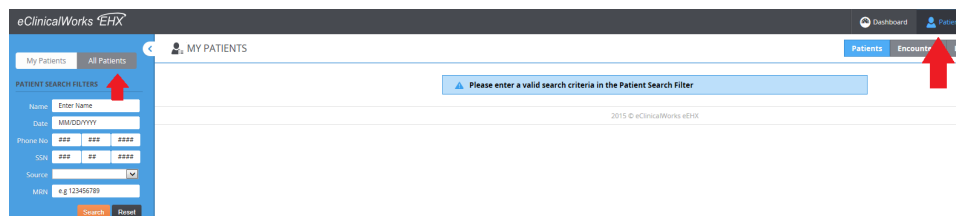
- g. Immunizations/injections
- h. Vital signs (only categories that have been mapped)
- i. Social, family, medical and surgical history
- j. Hospitalization
- k. Labs/diagnostic imaging (only test names and dates are displayed here. Test results are listed under the Labs/Imaging tab.)
- l. People (users 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.

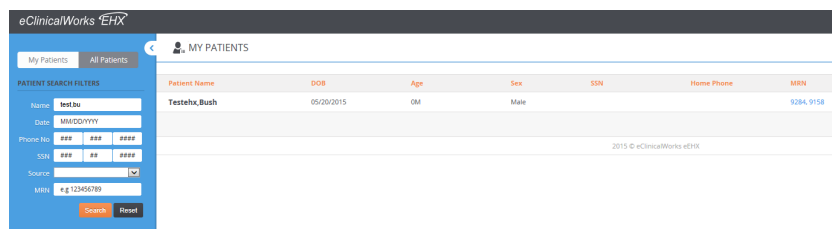


Patient Lookup- Patients can be looked up on the eHX Portal using the Patient Lookup tool. The Patient Search tab allows you to search for patients that have been eHX enabled.

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



- Select one of the following search criteria from By drop-down list:
 - Name** to search by name.
 - DOB** to search by date of birth in the mm/dd/yyyy format.
 - Tel** to search by telephone number.
 - MRN** to search by medical record number.
- 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:

- The primary provider
- The referring provider
- The rendering provider
- In the database where the encounter was made
- 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:

PATIENT LOOKUP

You have no prior relationship with the following patient!

Patient Name: Testelhu, Aster

Sex: Male

Date Of Birth: Jan 21 2001

Address: 1 Town St, Columbus OH 43210

If for some reason you need to access these records, please enter the reason below

Reason: ☒

Type Reason Here

STOP

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

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

Testeha, Bush, (M)
May 20 2015 (9 Years)

eHEALTH SUMMARY

DEMOGRAPHICS

Name	Date of Birth	Gender	Address
Testeha, Bush	May 20 2015	(M)	-

PROBLEMS

Date	Type	Code	Description	Status	Notes	Specify	Source
May 28 2015	Problem	789.00 (ICD9-CM)	Abdominal pain, unspecified site	Active			
May 28 2015	Problem	425.9 (ICD9-CM)	Unspecified secondary cardiomyopathy	Active			
May 28 2015	Problem	429.3 (ICD9-CM)	Cardiomegaly	Active			
May 28 2015	Problem	902.0 (ICD9-CM)	Abdominal aorta injury	Active			

ACTIVE MEDICATIONS

Date	Comment	Medication	Strength	Form	Quantity	SIG	Refills	Stop Dt.	Source
May 29 2015	Continue	Berium Sulfate	100 %	Suspension		Orally	0		Rajbir Bajwa TEST

SOCIAL HISTORY

Date	Type	Description	Status	Source
May 28 2015	Tobacco Use/Smoking	Are you a: nonsmoker - Additional Findings: Tobacco User: Pipe smoker, Additional Findings: Tobacco Non-User: Ex-pipe smoker	Current	Rajbir Bajwa TEST

MEDICAL HISTORY

Date	Description	Source
May 29 2015	adopted	Rajbir Bajwa TEST
May 29 2015	allergies	Rajbir Bajwa TEST
May 29 2015	aortic insufficiency	Rajbir Bajwa TEST

SURGICAL HISTORY

Date	Surgery Date	Description	Source
May 28 2015	-	achilles tendon repair	Rajbir Bajwa TEST
May 28 2015	-	anterior repair	Rajbir Bajwa TEST

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.