Health Information Exchange

Provider User Guide

Nationwide Children’s
When your child needs a hospital, everything matters.™
# Table of Contents

Patient Lookup- Viewing eEHX Status from Patient Lookup ........................................ 1
Patient Lookup- Viewing Accounts on the eEHX Portal .............................................. 2
Patient Lookup- Viewing and Downloading Patient Information on the eEHX Portal .................................................................................................................. 3
Patient Lookup- Linking Existing Practice Patient to eEHX Patient (Link Patient) 4
Patient Lookup- Importing Patients from the eEHX Portal (Import Patient) .................. 5
Patient Hub- eEHX Buttons .............................................................................................. 6
Patient Hub- Accessing eEHX from the Medical Summary Window ......................... 7
Patient Hub- Patient Documents/Publishing to eEHX ..................................................... 8
Progress Notes .................................................................................................................. 9
Progress Notes and eEHX Portal Integration ................................................................. 10
Using the Demographics Tab .......................................................................................... 11
Using the Lab/ DI Tab ....................................................................................................... 12
Using the Documents Tab ................................................................................................. 14
Importing Information form the eEHX Portal into the Progress Notes ..................... 15
eEHX Portal ..................................................................................................................... 16
View Merged eHealth Summary (CCD) .......................................................................... 20
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.

<table>
<thead>
<tr>
<th>ICON</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🖖️</td>
<td>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.</td>
</tr>
<tr>
<td>🙁</td>
<td>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).</td>
</tr>
<tr>
<td>😓</td>
<td>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).</td>
</tr>
<tr>
<td>🤔</td>
<td>The blue pencil icon indicates that a patient has opted in, but only their demographic information has been uploaded to the eEHX Portal.</td>
</tr>
<tr>
<td>🎨</td>
<td>The blue question-mark icon indicates that a patient is unclear about whether to opt-in or not.</td>
</tr>
<tr>
<td>🎧</td>
<td>No icon indicates that a patient has never been linked with the eEHX Portal in any way, or they have been completely unlinked.</td>
</tr>
</tbody>
</table>

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 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- Accessing eEHX from the Medical Summary Window

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

Click the **eHX Options** button to open a category list and select an option:

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

b. **Export to eHS to eHX** - export the patient’s latest medical information to the eEHX Portal. This option is the same the Export eHS to eHX option accessed from the **eHX Options** button on the Progress Notes window.
Patient Hub- Patient Documents/Publishing to eEHX

You can upload certain documents to the eEHX Portal. Documents contained in the following folders are the only documents that can be uploaded to the eEHX Portal: Lab, X-ray, consult notes, chart documents, patient documents and referral notes.

**Tip**

Documents must be marked as Reviewed and Ready to be Published to eHX 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 the document and click the **Update** button. The Document Details window opens.
3. Check the **Reviewed** and **Publish to eHX** checkboxes.

**Stop**

The Publish to eHX checkbox is only available if the following 2 criteria are met:

- This patient has been enabled for the eEHX Portal.
- This document has been added to 1 of the designated document folders.

4. Click the **OK** button. The document will be uploaded to the eEHX Portal the next time the **Export Documents** button is clicked on the patient’s Patient Hub or during nightly synchronization.
Progress Notes

Several eEHX-related tasks can be accomplished from the progress notes.

Using Consent Columns- several lists in the Progress Notes contain a consent column to inform you which elements are public or private. Consent columns appear on the following windows:

**Tip**

**Public**- any user with access permission can view this information as long as the general consent form has been signed and is not expired. This is the default setting for all items. New items that are created in the EMR that are not located on the eEHX Portal are marked as Public by default.

**Private**- this information will not be uploaded to the eEHX Portal under any circumstances.
Progress Notes and eEHX Portal Integration

Accessing the eEHX Tab in the Chart Panel

The Chart Panel is a separate pane on the right side of the Progress Notes window. It is only visible when the far-right Show/Hide button is green. If the center dark green circle in this icon is red, click it to turn it green and display the Chart Panel.

![Chart Panel Icon]

The eEHX tab is located on the far right of the Chart Panel tabs:

![Chart Panel Tabs]

The patient’s name and age, as well as the current date are displayed in the header of the tab.

Access Longitudinal View from the Chart Panel

The Longitudinal View (LV) can be viewed from the eEHX tab on the Chart Panel. To view an LV for a patient from the Chart Panel, you must have access to the eEHX to view data on the eEHX tab and follow the steps below.

1. Open the Progress Notes window.
2. Click the eEHX tab. The eEHX options display.
3. Click the Patient eEHX Summary link at the top of the Chart Panel. The eHX Patient eHS window opens.

![Longitudinal View]

**Tip**
This feature can also be accessed from the Progress Notes by clicking the green arrow next to the eEHX Options button to open a drop-down list and clicking the View and Import eHS option.
Using the Demographics Tab

Basic demographic information about patients can be viewed on the Demographics tab. To use the Demographics tab, follow the steps below.

1. From the Progress Notes window, perform one of the following actions:
   a. Click the **Patient eEHX Summary** link at the top of the eEHX tab in the Chart Panel.
   b. Click the green arrow next to the eHX Options button to open a list and select the View and Import eHS option. The eHX Patient eHS window opens with the Physician eHS tab displayed by default.

2. Click the **Demographics** tab. The Demographic options display.

3. To receive message notifications concerning changes to this patient's record, check the **Clinical Notification Subscription** box.

4. To refresh the demographic information, click the **Update** button.
Using the Lab/ DI Tab

Lab and diagnostic imaging information for patients can be viewed on the Labs/DI tab.

**STOP**

Only test that have had the Received box checked are returned as results here.

To use the Labs/DI tab, follow the steps below.

1. From the Progress Notes window, perform one of the following actions.
   a. Click the link at the top of the eEHX tab in the Chart Panel.
   b. Click the green arrow next to the eHX Options button to open a drop-down list and click the View and Import eHS option.

The eHX patient eHS window opens with the Physician eHS tab displayed. This is the default.

2. Click the Labs/DI tab. The labs and diagnostic imaging tests on the eEHX Portal will display. Click any of the lab or diagnostic imaging tests listed for more information.
3. To view a cumulative report, follow the steps below.
   a. Click the **Cumulative Report** link in the top right corner of the tab. The Cumulative Report filters display.
   b. Select a method of searching for tests from the **Lookup By** drop-down list.
   c. Select a method of sorting the results from the **Sort By** drop-down list.
   d. Select a date range for which you want to view this cumulative report using the **From** and **To** calendars. The tests match the selected criteria display beneath the filters.
   e. To view the cumulative report for a single test, select the test from the **Lab** drop-down list.
Using the Documents Tab

Patient documents can be viewed on the Documents tab. Documents from the eCW EHR and Epic can be found under the Documents tab. To use the Documents tab, follow the steps below.

1. From the Progress Notes window, you can perform one of the following actions.
   a. Click the link at the top of the eEHX tab in the Chart Panel.
   b. Click the green arrow next to the eHX Options button to open a drop-down list and click the View and Import eHS option.

The eHX Patient eHS window opens. The Physician eHS tab is the default.

2. Click the Documents tab. The Document options display. Click any of the documents listed for more information.
Importing Information from the eEHX Portal into the Progress Notes

Specific information can be merged from the eEHX Portal into the Progress Notes that are currently open from the eEHX tab on the Chart Panel.

To import information from the eEHX Portal into the Progress Notes, follow the steps below.

1. From the Progress Notes window, click the eEHX tab in the Chart Panel. The eEHX Options are displayed.

   **Tip**
   
   To hide the information in any category, click the red minus sign icon on the left a category. Click on the icon again to show the category.

2. To import the contents of an entire category, click the blue arrow icon to the right of a category. The selected information is now merged into the open Progress Notes.

3. To import a specific item, click the blue arrow icon to the left of an item. For more information in any item, click the question mark icon to the right of an item.
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.

![eEHX Portal Screenshot]

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 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 a message from this window.

![Sent Messages](image)

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

![Deleted Messages](image)

**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 HER side. Information in this section is organized in descending order by date. Click on any of the following tabs to view related information.

![My Patients](image)

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 **Find a Patient** 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 are related 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 permission 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.