

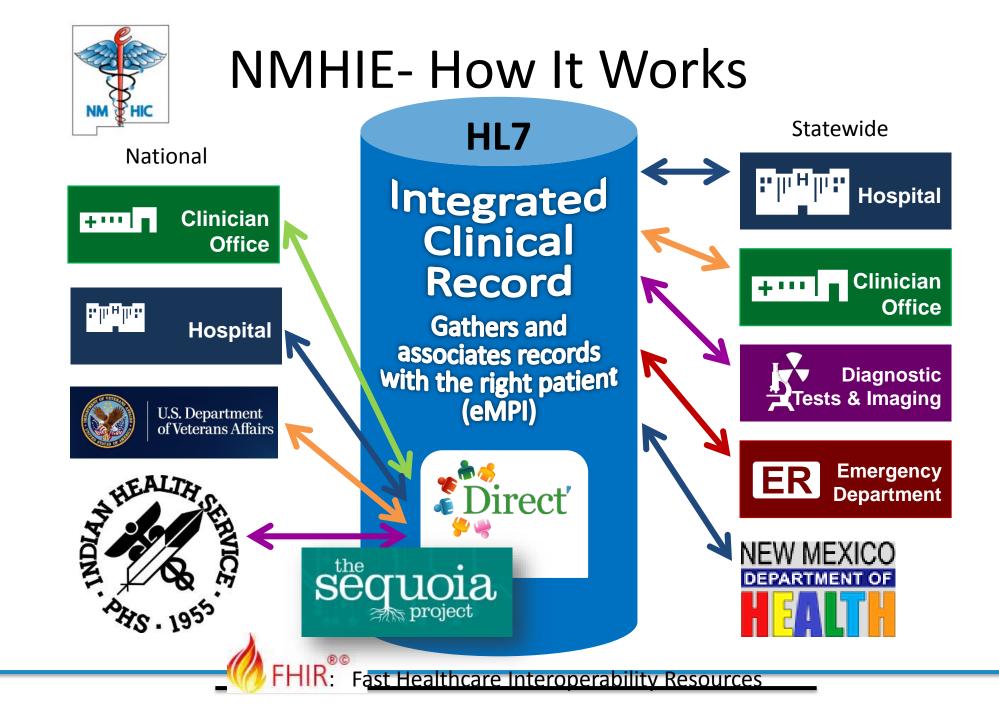
NMHIE CLINICAL PORTAL TRAINING HIE OVERVIEW

NM Health Information Exchange Overview

What is a Health Information Exchange (HIE)?

- One centralized record.
- Made up of information from multiple healthcare systems.
- The NMHIE is a cloud based platform which allows access from any computer with an internet connect.







Why do we need to use a Health Information Exchange (HIE)?

- More complete information about a patient
- Better coordination of care, because NMHIE access helps providers track and manage patients
- Improved efficiency
- Reduce repeat or unnecessary tests, labs, imaging, etc.



What kinds of information is in the HIE?

- Demographics
- Allergies
- Medications
- Immunizations
- Insurance
- Procedures
- Problem List
- Encounters (Visits) & Diagnoses

- Lab Data
- Radiology Data
- Clinical Notes
- Note: Data available varies by organization

Who provides data now?

- ABQ Health Partners
- CHRISTUS St. Vincent Regional Medical Center
- Holy Cross Hospital, Taos
- Lovelace Health System
- Presbyterian Healthcare Services
- TriCore Reference Laboratories
- University of New Mexico Hospitals
- Quest Diagnostics



Privacy and Security

- Information within the NMHIE is subject to Federal and State Privacy and Security Regulations which includes HIPAA, HITECH and other regulations.
- Information is encrypted at rest and in transit.
- Access is limited to authorized users only.



Privacy and Security

- All health organizations that participate in the NMHIE are required to safeguard the confidentiality, integrity, and availability of patient health information.
- Federal regulations require medical providers to monitor and protect patient privacy, and the New Mexico Electronic Medical Records Act requires that access is audited.



Who has access to NMHIE?

- Authorized providers and staff with the patient's written permission, or "consent".
- Those who "Break the Seal".
 - 1. Consent has just been given, or
 - 2. It's a life-threatening situation.



Inactivity Timeout

- The default setting for automatic logout due to inactivity is 15 minutes.
- Users may choose to set a shorter time, but not longer.
- The user will be warned before the automatic logout happens.



Why Patient Consent?

 New Mexico law states that patients must give consent before authorized providers at different healthcare organizations and their facilities may view and share information in the patient's electronic medical record.



Patient Consent

- Written patient consent is required before a provider views the record
- If consent is granted, ALL of their health information can be viewed
- Consent must be obtained by each organization at point of care
- Only exception: "Break the seal"



Managing Consent

- Patient chooses which healthcare organizations get access to their record and signs consent form there.
- Patient can choose to not sign the consent form, and the care team will not be able to access their information using the NMHIE.
- In the event of a life threatening situation, a provider can "break the seal".



Opt Out/Opt In

- Patients may choose to Opt Out of the NMHIE system entirely.
- Opting Out means that no one may access patient information, even in the case of a life threatening emergency.
- Opt Out is different than refusing to give consent and wipes out all previously given consents.
- Opt Out/Opt Back In Forms are available at NMHIE.

Consent vs. Opt-Out

- Providing consent or withdrawing consent at the organization level is not the same as Opting-Out.
- You will be helping patients to decide whether or not to grant consent to your organization's healthcare providers.



Patient's HIE Consent Decision

Do Not Give

<u>Give Consent</u> Full access to all information by that organization.

Consent

- Consent Not Granted
- Decision Not Made, or
- Consent Has Been Withdrawn

Information is in NMHIE, but no access is permitted unless "Break the Seal" conditions exist. Break the Seal is available for limited time and is audited.

Opt Out

No access to any information by anyone, even in an emergency.

A search will return "Patient not found". Overrides any previous consents given.

"Breaking the Seal"

- Overriding the patient privacy policy, aka "break the seal" is possible for some user levels, unless the patient has opted-out.
- Only two valid reasons.
 - life-threatening emergency
 - written consent obtained but not yet entered into the system
- 30 min & can be repeated for that situation.
- Attempt to obtain written consent afterwards.
- Closely audited.



Access and Privacy



- Consented with Full Access Granted (no icon)
- Privacy sealed record (requires consent or break the seal)
 - Unlocked (seal broken for 30 mins)
 - "Patient Not Found"
 - patient has no data or has opted-out



Can a patient refuse to give consent?

- Absolutely! The patient is in control of which healthcare organizations can access his/her information in the system.
- Not granting (or withdrawing) consent is always an option.



Can a patient refuse to participate?

- A patient may also choose to Opt-Out of the HIE entirely. (Done at NMHIE.)
- Encourage the patient to stay opted-in to allow access to the record for a life-threatening emergency, even if they don't give consent to your organization.



Do we always need to get consent first?

- No.
 - An authorized user can "break the seal" if the patient is in a lifethreatening emergency or if written consent has been obtained but not yet entered into the system.
- "Break the Seal" ability is not given to all users of the HIE.
 Typical users are ER staff, ICU Staff, etc.
- Access is only for a 30-minute time limit and can be repeated for that situation only.
- Break the Seal is audited.



What should I say to the patient?

- Suggested Script:
- "We are part of the New Mexico HIE. An HIE is a centralized medical record with information from many different healthcare organizations in NM. We believe by having access to the HIE our doctors will be able to read about all the different medical care and treatment you have had, and that may help with the care and treatment you receive here."



What if the patient is worried about the security of the information?

- Suggested script:
- "I can understand your concerns. Please remember the information in the system is encrypted. Basically that means the information is protected similarly to banking, and payment websites on the internet."



What should I say if the patient declines to give consent?

- Suggested script:
- "Okay. You can always decline. If you want more time to think about it or want more information, I can provide that to you. You can always give written consent later if you change your mind."



Is the information secure?

- Information within the NMHIE is subject to Federal and State Privacy and Security Regulations which includes HIPAA, HITECH and other regulations.
- Information is encrypted.
- Access is limited to authorized users only.
- Unique user IDs are required.
- The HIE is not open to the general public.



Is the information confidential?

- All organizations and business associates that participate in the NMHIE are required to safeguard the confidentiality, integrity, and availability of patient health information.
- Access is role-based.



Is the information audited?

- Federal & State regulations require medical providers to monitor and protect patient privacy.
- The HIE system provides the Compliance and Security departments the ability to monitor access to the information through audit logs.



Where can I get more information?

- Your organization is provided with additional information and FAQ sheets to use.
- Patients can always be referred to the NMHIE website at:
 - <u>http://www.lcfresearch.org/nmhic-hie</u>
- Patients can call NMHIE at 505-938-9900



NMHIE CLINICAL PORTAL TRAINING

CLINICAL PORTAL BASICS



Clinical Portal Basics: Getting Started

Your Password

- Username is not case sensitive but password is
- Username format is "unm-[your hsc netid]"
 - Example: unm-jdoe
- Password is a minimum of 9 characters:
 - Upper and lower case letters
 - Numbers
 - Special characters



Example: T@1kT0Me!

Disclaimer

Disclaimer displays and prompts user to Accept or Cancel

Accept this disclaimer to continue

If you do not accept this disclaimer within five minutes, you will be logged out and returned to the login page. 67

By accessing information using the NMHIC Health Information Exchange, I understand and agree that my access to and the use and disclosure of such information by me is subject to Federal and State laws and contractual duties and obligations. Without limiting the foregoing, to the extent that any information accessed includes information related to viral hepatitis, human immunodeficiency virus (or its antigen or antibody), or sexually transmitted diseases, I understand that New Mexico law prohibits the re-disclosure of such information in violation of the applicable statutes and that a person who makes an unauthorized disclosure of such information is guilty of a petty misdemeanor punishable by imprisonment in the county jail for a definite term not to exceed six months or the payment of a fine of not more than \$500 or both.



Cancel



- Use navigation links within the portal, not forward and back buttons in your browser
- Home (you can choose view)

Icons on the Homepage

lcon	Function	Description
Help	Help	Provides generic, context-specific help if configured
Demo ClinicianOneABQ 🔻	Full Name	Your full name associated with this account
! 1	Portal message indicator	Indicates the number of new unread messages and whether there are important messages
Logout	Logout	The button that safely exits the HIE
You last logged in 0	Last Log in	A brief pop up indicating when you last logged into this user account
>>	Hide / Unhide	Hides or reveals the left side menu

Common Home Page Menu Items

- Patient or User Search
- Portal messaging
 - New messages
 - Received messages
 - Sent messages
- Common
 - My Details

My Details

- Two ways to get to My Details page
 - Common \rightarrow My Details
 - Drop down at top right under your name \rightarrow User Settings
- In the My Details page you can:
 - Change your password
 - Set up your security challenge Q&A
 - Modify your home page view
 - Modify your important message alert
 - Update your contact information
 - Reduce length of inactivity timeout
 - Choose a preferred patient look up system type

Setting or Resetting Your Password

- After first login, your temporary password expires
- At any time, use My Details screen to change your password
- Forgotten password on login screen can only be used if you have set your security challenge questions
- Must change your password every 90 days, and no more frequently than once every 2 days

Portal Messaging

- ▼PORTAL MESSAGING New Message Received Messages Sent Messages
- Portal Messaging is the HIE's internal e-mail system
- All HIE users have a portal mailbox
 UNM does **NOT** use this feature
- If you try to send a portal message, the following message will pop up:
 - "Do not send urgent messages via portal messaging as the mailbox may not be immediately monitored, and some providers do not use portal messaging at all. For urgent and sensitive matters, please contact the provider directly."

NMHIE CLINICAL PORTAL TRAINING

PATIENT SEARCHES



Searching for Patients

Patient Search – Method 1

- Search the HIE using the patient's EMR (local) Identifier with the associated EMR System Name
 - Example:
 EMR (Local) Identifier: C10028 +
 System Name: CH-CityHospital
 - Local ID takes precedence over all other criteria
- OR...



Patient Search – Method 2

- Demographics Search
- Last name and...
 - Date of Birth
 - Gender
 - First Name
 - Middle Name
- Wildcard character "%" may be used in Name fields
 - Example: "John%" to return "John", "Johnson", "Johnston", etc.
- Search will return close matches
 - Example: Search for Peterson will return matches for Petersen, Patterson, Pederson
 - May produce unexpected results, potential maiden to married names, or people with same DOB and similar name



Step 1 – Search for Patient

Patient Search Recent Patients						em Name ific search)	
Worklists	System Nar	ne		ew Mexico Hospital 💌	(most spec		-
WORKLISTS	Date of Birt	h			Middle Name		
COMMON PORTAL MESSA	Sex		 Male Female All 				
	PATIENTS Patient Search Recent Patients Worklists WORKLISTS	EMR (L	nt Search ocal) Identifier Name f Birth	plus First Nat DOB, and/or University of New Mexico 12/18/1989	Gender.	Last Name First Name Middle Name	Blessing Arma%
	COMMON	Sex		 Male ○ Female ○ All 			n be used ildcard.
		Sear	ch Reset				

Step 1 (cont.) – Search for Patient

EMR (Local) Identifier		Last Name	Susa
System Name	University of New Mexico Hospital 👻	First Name	Ralph
Date of Birth	8/14/1969	Middle Name	J
Sex	 Male ○ Female ○ All 		
Search Reset			

"No Results Found" may mean:

- The patient has opted-out of the HIE
- The HIE has no information about this person
- The search criteria you used may not be correct for this person – try broadening your search

Step 2 – Verify and Select Patient

ient Search	'n				
R (Local) Identifier		Last Name	Mouse		
tem Name	University of New Mexico Hospital 💌	First Name	M%		
te of Birth	~	Middle Name			
ĸ	 Male ○ Female ○ All 				
		Name		Data of Pith (Ass.)	Cov
					Sex
1111100001 (LHS-N (LHS-MedicalCtr);	/ledicalCtr); 1111100001 (LHS-Roswell); 11111	Phone 33	7111111	01-Jan-1955	Male
019914 (AHP-ABQ (OHCP);	HlthPrt); 22222 (LHS-MedicalCtr); 22222	Address 44	4 Forest St Los Angeles	17-Apr-1997(18 years)	Male
	R (Local) Identifier stem Name te of Birth x Search Reset EMR (Local) Ids 1111100001 (LHS-N (LHS-MedicalCtr); 019914 (AHP-ABQ	stem Name University of New Mexico Hospital te of Birth x Image: Search Reset EMR (Local) Ids 1111100001 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 019914 (AHP-ABQHIthPrt); 22222 (LHS-MedicalCtr); 22222	R (Local) Identifier Last Name stem Name University of New Mexico Hospital Last Name First Name Middle Name Male Female All Search Reset EMR (Local) Ids 1111100001 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 Mouse, Micl Phone 33 Address 11 DECEASED 019914 (AHP-ABQHIthPrt); 22222 (LHS-MedicalCtr); 22222 Mouse, Minin Address 4dress 4dress	R (Local) Identifier tee Mame te of Birth Male Female All University of New Mexico Hospital Middle Name First Name Middle Name Middle Name Middle Name EMR (Local) Ids I111100001 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 Address 111 Test St Sulphur LA 88888 DECEASED 019914 (AHP-ABQHIthPrt); 22222 (LHS-MedicalCtr); 22222 Mouse, Minney	R (Local) Identifier university of New Mexico Hospital First Name Middle Name Middle Name Middle Name Middle Name Male Female All Search Reset EMR (Local) Ids I111100001 (LHS-MedicalCtr); 1111100001 (LHS-Roswell); 11111 Mouse, Mickey M Phone 337111111 Address 111 Test St Sulphur LA 88888 DECEASED 019914 (AHP-ABQHIthPrt); 22222 (LHS-MedicalCtr); 2222 Mouse, Minney Address 4ddress 4ddress 111 T-Apr-1997 (18 years)

VIEWING THE PATIENT SUMMARY



Viewing the Patient Summary

Icons in the Record

lcon	Function	Description
×	Close record	Closes the patient record the user is currently viewing
$\langle \equiv \rangle$	Context navigation	From an open record, allows navigation to the previous or next record in the most current list, e.g., patient search, recent patients, or a worklist
9	More detail	In the patient's encounter windowlet, this icon displays additional diagnoses
+	Worklist	Click this icon to add the current patient to a particular work list

Patient Summary

- Displayed upon entry into patient record
 - Demographics
 - Allergies & Alerts
 - Encounter History
 - Medication History
 - Insurance Information
 - Immunizations
 - Procedures
 - Problems

The Patient Summary is displayed upon entry into the patient record

He -				Home	неір 🛄 Ар	ril Salisbury 🔻 Logout	OR
008901_111 (AHP-ABQHIthPrt) 106532R (LHS-MedicalCtr) 8	34568-4564 (LHS-N	ledicalCtr) CARD	INAL John Q (м 64	years)			:
Patient Summary	EMPI Demo	graphics					
Showing All Mark All As Read							
Group By Category Sort By Date	cardinal, Joh						
Patient Summary	Other Identife	IS		Emerge	ency Contact		
Dynamic Documents (1)	AHP-ABQHIth	Prt	008901_111	Name	Jargor	n, Carol	
Patient Snapshot	LHS-Medical	Ctr	106532R	Relatio	nship Not sp	ecified	
Laboratory (20 / 43)			Ctr 84568-4564				
Blood Gases (1) Ø 01/09/2005 * Arterial Blood Gas (1) Dr Joe Martin	LHS-Medical	LHS-MedicalCir 84508-4564			(408)	455-2112	
Chemistry (10)							
204/24/2012 Electrolytes (5) Dr Timothy Orange	Demographic		Primary	Care Provider			
2/04/25/2006 INR (4) Dr John Black	Sex	Sex Male		Name	Name WOOD, Brandon R		
201/09/2005 Creatinine (1) Dr Joe Martin	Date of Birth 11/12/1949 (64 years)			Clinic	Clinic Bough Family Clinic		
Hematology (19 / 29)					Dought anni	onnie	
2/05/01/2012 HBA1C (2 / 7) Dr Joe Martin	Address	840 Chester Ave P	asadena Sulphur 6	532			
Ø 05/01/2012 * CBC (17 / 22) Dr Alerberto Jose	Phone	(463) 321-456					
Immunology (1 / 2) Ø 01/22/2001 HEPATITIS SCREEN (1) Dr. Peter Black							
201/22/2000 HIV ANTIBODY (1 / 1) Dr. Peter Black	1						
Serology (1)							
201/09/2005 Cross Match Dr Alerberto Jose	Allergies &	Alerts					
Microbiology (5)			_				
Microbiology (5)	Details	Reaction	0000	ity Date	Lintered	adinty	
205/01/2012 * Urine Culture@ORION Dr Francis McNamar	a Latex	Difficulty brea	thing	2011	-11-05	Hospital A Medical Center	
11/02/2006 Midstream Urine Dr Joe Martin 2 04/22/2006 * Midstream Urine Dr Joe Martin	ibuprophen	Difficulty brea	thing	2011	-11-05	Hospital A Medical Center	
204/22/2006 * Midstream Urine Dr Joe Martin 204/21/2006 * Midstream Urine Dr Timothy Orange	Vancomycin	Wheezing		2011	-11-05	Hospital A Medical Center	
Ø04/20/2006 Midstream Urine Dr Joe Martin		_				•	
Pathology (1)	Vancomycin	allergicreaction	on Mode	rate 2011	-11-05	Hospital A Medical Center	
Radiology (1 / 7)	ibuprophen	allergicreaction	on Mode	rate 2011	-11-05	Hospital A Medical Center	
CAT Scan (4)	Latex	allergicreaction		0044	-11-05	Hospital A Medical Center	

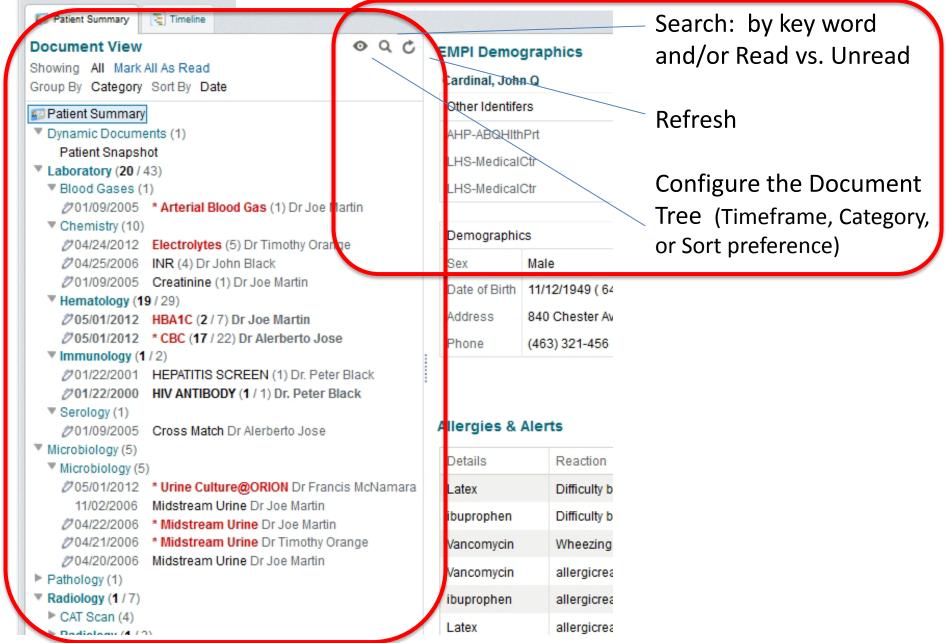
Encounter History

- Displays patient's previous contact with HIE participant organizations
 - Date of admission and discharge
 - Reason for admission
 - Diagnosis at discharge
 - Type of visit (inpatient, outpatient, emergency, etc.)
 - Specialty
 - Facility where the encounter occurred
 - Clinician responsible for the patient's care during encounter

ning All Indik All As Reau	Enco	ounter Histo	ory						
p By Category Sort By Date	1	Admission	Discharge	Admit Reason	Discharge Diagnosis	Visit Type	Specialty	Facility	Clinician
ynamic Documents (1) aboratory (27 / 43)	٩	06-Mar-2013	06-Mar-2013	Cardiology Check	Stable Angina (853) (1 diagnoses not shown)	OUTPATIENT	CARDIOLOGY	LHS-MedicalCtr	Francis McNamara
icrobiology (5 / 5) athology (1)	٩	01-May-2012	01-May-2012	Scheduled follow up	Diabetes (5) (1 diagnoses not shown)	EMERGENCY	EMERGENCY	LHS-MedicalCtr	Demo Physician
adiology (3 / 7)	٩	16-Jul-2010	19-Jul-2010	Chest Pain	Stable Angina (853) (0 diagnoses not shown)	INPATIENT	CARDIAC MEDICAL	LHS-MedicalCtr	Joe Martin
	9	31-Jan-2008	31-Jan-2008	Diabetes	Diabetes (5) (0 diagnoses not shown)	OUTPATIENT	MEDICINE	LHS-MedicalCtr	Leroy Hood
	٩	12-Nov-2007	12-Nov-2007	Diabetes	Diabetes (5) (0 diagnoses not shown)	OUTPATIENT	MEDICINE	LHS-MedicalCtr	Leroy Hood
	9	04-Aug-2007	04-Aug-2007	Diabetes	Diabetes (5) (0 diagnoses not shown)	OUTPATIENT	MEDICINE	LHS-MedicalCtr	Elizabeth Samson
	٩	20-Apr-2006	24-Apr-2006	Congestive heart failure	Congestive heart failure (4) (0 diagnoses not shown)	INPATIENT	CARDIOLOGY	LHS-MedicalCtr	Alerberto Jose
	٩	08-Jan-2005	12-Jan-2005	Diabetes Mellitus	Diabetes Mellitus (3) (0 diagnoses not shown)	INPATIENT	MEDICINE	LHS-MedicalCtr	Elizabeth Samson
	٩	09-Dec-2002	10-Dec-2002	Complication of wound	Wound restitched (6) (1 diagnoses not shown)	INPATIENT	MEDICINE	LHS-MedicalCtr	Joe Martin
	٩	16-Nov-2002	17-Nov-2002	Infection of cut to arm	Wound cleaned (1) (0 diagnoses not shown)	INPATIENT	MEDICINE	LHS-MedicalCtr	Joe Martin
	٩	12-Sep-2002	12-Sep-2002	Cardiology Check	Stable Angina (853) (0 diagnoses not shown)	OUTPATIENT	CARDIAC REHAB	LHS-MedicalCtr	Francis McNamara
				UNEUK	diagnoses not snown)		REMAD		wcivamara

	C Medication His	tory							
rowing All Mark All As Read oup By Category Sort By Dat			Cia	Route	Start	Stop	Properihad P	v. Otatua	Facility
Patient Summary	SIMVASTATIN	Dose TAB	Sig Once Per Day In the evening	Oral (0 routes not shown)			Prescribed B	y Status Ordered	Facility
Dynamic Documents (1)	Atenolol	TAB	Twice daily	Oral (0 routes not shown) Oral (0 routes not shown)	03/07/2014			Ordered	
Laboratory (27 / 43) Microbiology (5 / 5)			Twice per day w/meal	Oral (0 routes not shown)					
Pathology (1) Radiology (3 / 7)	METFORMIN XR TAB Twice per day w/meal Oral (0 routes not shown) 03/07/2014 04/07/2014 Ordered AHF								74.11
	Immunizations								
			Date Vaccine		· · · · · · · · · · · · · · · · · · ·	6999 1 992			Facility
		ccine		Amount Units	6 I	ocation	L	ot Number	acting
	Date Vac		x 23 25 MCG/0.5ML Injection Inj			Location Healthcare Ce		ot Number (1782BB	AHP
	Date Vac		x 23 25 MCG/0.5ML Injection Inj						
	Date Vac		x 23 25 MCG/0.5ML Injection In						
	Date Vac 05/10/2014 Pro		x 23 25 MCG/0.5ML Injection In Procedure Description		PECIFIED		nter - Bud V		
	Date Vac 05/10/2014 Pro Procedures			ectable 1 UNS	PECIFIED H	Healthcare Ce	nter - Bud V	1782BB	
	Date Vac 05/10/2014 Pro Procedures Procedure Code		Procedure Description	Date	PECIFIED H Procedu Dr Joe S	Healthcare Ce Ire Provider	nter - Bud V	1782BB Facility	

Document Tree



Viewing Results

Document View 💿 🍳 🖒	* Complete Blood Co	ount W/Differential (9	months ago)			Print Sen
Showing All Mark All As Read Group By Category Sort By Date	Complete E	Blood Cour	nt W/Differ	ential Cum	ulative « Show	w Older Show Newer »
Patient Summary	Number	1	2	3	Ref. Range (Units)	
 Dynamic Documents (1) Laboratory (4) Blood Bank (1) 	Collected	05/01/2014 02:55 OHCP	05/02/2014 03:43	05/03/2014 03:30		
Hematology (3) Ø 05/03/2014 * Complete Bloc	WBC	9.4	Collected		0 (9 months ago)	
 Ø 05/03/2014 * Complete Bloo Radiology (1) 	RBC	* 3.61	Received Reported		6 (9 months ago) 9 (9 months ago)	
	Hemoglobin	* 10.3	Source	OHCP		
	Hematocrit	* 30.4	Order Number	MMCBC2		
	MCV	84.4	84.2	83.5	78.0-100.0 (fL)	
	МСН	28.6	28.8	28.5	28.0-32.0 (pg)	
	МСНС	33.9	34.1	34.2	33.0-36.0 (g/dL)	
	RDW	17.1	* 16.5	* 16.7	11.5-14.5 (%)	
1	Platelet Count	225	229	225	130-400 (K/uL)	
	MPV	* 6.7	* 6.7	* 6.5	7.4-10.4 (fL)	
	Neutrophils	* 83.0	* 84.3	* 82.6	42.0-75.0 (%)	
	Lymphocytes	* 7.9	* 7.9	* 7.4	21.0-51.0 (%)	
	Monocytes	8.0	7.4	9.1	4.0-12.0 (%)	
	Eosinophils	0.9	0.3	0.6	0.0-5.0 (%)	
	Basophils	0.2	0.1	0.3	0.0-2.0 (%)	
	Anisocytosis	1+	1+	1+		

* Abnormal ** Critically Abnormal § Units or Reference Range differs

Where can I get more information?

- Your organization is provided with additional information and FAQ sheets to use.
- Patients can always be referred to the NMHIE website at:
 - <u>http://www.lcfresearch.org/nmhic-hie</u>
- Patients can call NMHIE at 505-938-9900