



Kentucky Health Information Exchange (KHIE)

ePartnerViewer

User Guide

July 2021

Copyright Notice

© 2021 Deloitte. All rights reserved.

Trademarks

"Deloitte," the Deloitte logo, and certain product names that appear in this document (collectively, the "Deloitte Marks"), are trademarks or registered trademarks of entities within the Deloitte Network. The "Deloitte Network" refers to Deloitte Touche Tohmatsu Limited (DTTL), the member firms of DTTL, and their related entities. Except as expressly authorized in writing by the relevant trademark owner, you shall not use any Deloitte Marks either alone or in combination with other words or design elements, including, in any press release, advertisement, or other promotional or marketing material or media, whether in written, oral, electronic, visual, or any other form. Other product names mentioned in this document may be trademarks or registered trademarks of other parties. References to other parties' trademarks in this document are for identification purposes only and do not indicate that such parties have approved this document or any of its contents. This document does not grant you any right to use the trademarks of other parties.

Illustrations

Illustrations contained herein are intended for example purposes only. The patients and providers depicted in these examples are fictitious. Any similarity to actual patients or providers is purely coincidental. Screenshots contained in this document may differ from the current version of the HealthInteractive asset.

Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

Document Control Information

Document Information

Document Name	ePartnerViewer
Project Name	KHIE
Client	Kentucky Cabinet for Health and Family Services
Document Author	Deloitte Consulting
Document Version	3.0
Document Status	Revised
Date Released	7/27/2021

Document Edit History

Version	Date	Additions/Modifications	Prepared/Revised by
1.2	October 2019	Description of ePartnerViewer Enhancements	Deloitte Consulting
1.3	January 2020	Removed HealthInteractive Logo, added notes for Medicaid CCD, and PDMP	Deloitte Consulting
2.0	April 2021	Updated guide with latest screenshots and features available	Deloitte Consulting
3.0	July 2021	Updated guide with latest screenshots and features available	Deloitte Consulting

Table of Contents

1 Introduction	6
Overview	6
Supported Web Browsers	6
Mobile Device Considerations	7
Accessing the ePartnerViewer	7
2 ePartnerViewer Roles	8
Overview of Clinical User Roles	8
Overview of Additional User Roles	9
3 KOG Registration and Login	10
Create a KOG Account	10
KOG Account Validation	13
Multi-Factor Authentication	16
MFA by Email Verification	16
MFA by Phone Verification	18
4 Terms of Use and Logging In	20
5 myDASHBOARD Overview	21
myDASHBOARD	21
Navigation Bar	22
Patient Search Tab	22
Bookmarked Patients Tab	23
Event Notifications Tab	23
Secure Messaging Tab	24
Support Tab	25
User Profile	25
6 Searching for a Patient	26
Quick Search for a Patient	26
Advanced Search	27
7 Basic Features in the Patient Chart	31
Date Selection	31
Pagination	32
Controlling the Number of Entries that Display	33
Available Documents and Filter Documents	33
Applying a Filter	35
ePartnerViewer Icons	36
8 The Patient Chart	37
Overview of the Patient Chart	37
Data Retrieval	38
Patient-at-a-Glance (Patient Summary)	39
Reviewing the Tabs	41
9 Bookmarking a Patient	54
Reviewing Bookmarked Patients	54
Adding Bookmarks	55
Removing Bookmarks	55
10 Viewing and Exporting Radiology Images	56
Viewing Images in ePartnerViewer	56

Exporting Images.....	60
11 Reviewing and Managing Event Notifications.....	63
Reviewing Event Notifications	63
Managing Event Notifications.....	64
12 Managing User Preferences.....	70
Apply Customized Preferences	70
Patient Dashboard Display	71
Date, Time, and Number Format.....	73
Clinical Document Date Search	73
13 Logging Out of the ePartnerViewer.....	74
14 Technical Support.....	74
Support Tab in the Navigation Bar	74
Toll-Free Telephone Support.....	74
Email Support	74

1 Introduction

Overview

The Kentucky Health Information Exchange (KHIE) utilizes the Kentucky Online Gateway (KOG) to authenticate if an individual is part of an organization that has access to review patient health information in KHIE. To access KHIE, Authorized Users must establish a KOG account.

This document provides Kentucky Health Information Exchange (KHIE) authorized users with an introduction to KHIE's clinical portal, the ePartnerViewer. The ePartnerViewer offers a single location where patient health information is aggregated from all KHIE Participants and is presented in a read-only view. Users have the option to customize the display of patient data in a functional and easy-to-use format that works best for them.

The data available in the ePartnerViewer includes:

Data Type	Contents
Patient Summary	<ul style="list-style-type: none">• Patient at-a-glance view of the most recent clinical information
Medication & Allergies	<ul style="list-style-type: none">• Medications• Medication & Non-Medication Allergies
Clinical Documents	<ul style="list-style-type: none">• Continuity of Care Documents (CCDs)• KHIE Summary CCD• Medicaid CCD• Prescription Drug Monitoring Program (PDMP)• Other Documents
Laboratory & Pathology	<ul style="list-style-type: none">• Laboratory Results• Pathology Results
Reports	<ul style="list-style-type: none">• Radiology Reports• Other Transcribed Reports• Images
Encounters	<ul style="list-style-type: none">• Clinical Encounters• Problems• Procedure History
Immunizations	<ul style="list-style-type: none">• Immunization History
Uncategorized	A result report that has not been designated as a particular type of result. Undesignated laboratory, pathology, and radiology reports may appear here.
Patient Demographics	Demographic data based on MRN number, such as next of kin, visit information, insurance, sending facility, extreme drug resistant organism (XDRO) status

All examples and screenshots used in this guide are simulated with mock data; no Protected Health Information (PHI) is present.

Please Note: All screenshots shown throughout this document reflect how Users would interact with the ePartnerViewer while using a desktop or tablet device. While core functionality remains the same across multiple devices, interface components may vary in presentation.

Supported Web Browsers

Users must access the ePartnerViewer with a supported web browser. The ePartnerViewer is configured to

support the following modern browsers on desktop, tablet, and mobile devices:

Desktop Browser Version	Mobile Browser Version
Microsoft Edge	
Version 44+	Version 40+
Google Chrome	
Version 70+	Version 70+
Mozilla Firefox	
Version 48+	Version 48+
Apple Safari	
Version 9+	iOS 11+

Please Note: The ePartnerViewer does not support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

Mobile Device Considerations

The ePartnerViewer is based on responsive design. This means it renders in the best format based on the user's device size. Responsive design applies to mobile, tablet, and desktop devices. Tablet devices in landscape display mode are considered desktop.

Accessing the ePartnerViewer

To access the ePartnerViewer, users must meet the following specifications:

1. Users must be part of an organization with a signed Participation Agreement with KHIE.
2. Users are required to have a Kentucky Online Gateway (KOG) account.
 - a. Details on creating a KOG account are in *Section 2 KOG Registration and Login* of this guide.
3. Users are required to complete Multi-Factor Authentication (MFA).
 - a. Details on MFA are included in the *Multi-Factor Authentication (MFA)* subsection in *Section 2 KOG Registration and Login* of this guide.

2 ePartnerViewer Roles

Overview of Clinical User Roles

The ePartnerViewer provides access to different functions depending on the roles that have been provisioned. All Clinical User Roles have been authorized by a KHIE Participant Organization to access patient's clinical data in KHIE's ePartnerViewer. The specific clinical role designations are for reporting purposes.

Clinical User Roles for the ePartnerViewer:



Description of Clinical User Roles for the ePartnerViewer:

- An Organization may have multiple Clinical User Roles (Users).
- Clinical Users may add and manage patients to receive event notifications.
- Clinical Users have access to all clinical data available on a patient.
 - **Please Note:** When there is a PDMP report available on a patient, only users with KASPER authorization will be able to view that report in the ePartnerViewer.
- Clinical Users may also have any of the following roles:
 - Event Notification Admin
 - KHIE Organization Admin
 - Manual Data Submission
 - PACS Administrator
 - Requires a Clinical role to access the images
 - Access Admin
 - Manual Case Reporter
- Clinical Users may have the *same Clinical role* in two different organizations.
 - Example: John Doe may be a Physician at Hospital A and a Physician at Hospital B.
- Clinical Users **cannot** have *two different Clinical roles* in the same organization.
 - Example: John Doe cannot be a Physician AND a Paramedic at Hospital A.
- Clinical Users **cannot** have *two different Clinical roles* in two different organizations.
 - Example: John Doe cannot be a Physician at Hospital B and a Paramedic at Hospital B.

Overview of Additional User Roles

The following roles are considered non-clinical access roles. Depending on the needs of the organization, Users can have one of the Clinical roles AND any or all of the non-clinical roles.

- Example: John Doe may be both a Physician AND an Event Notification Administrator.

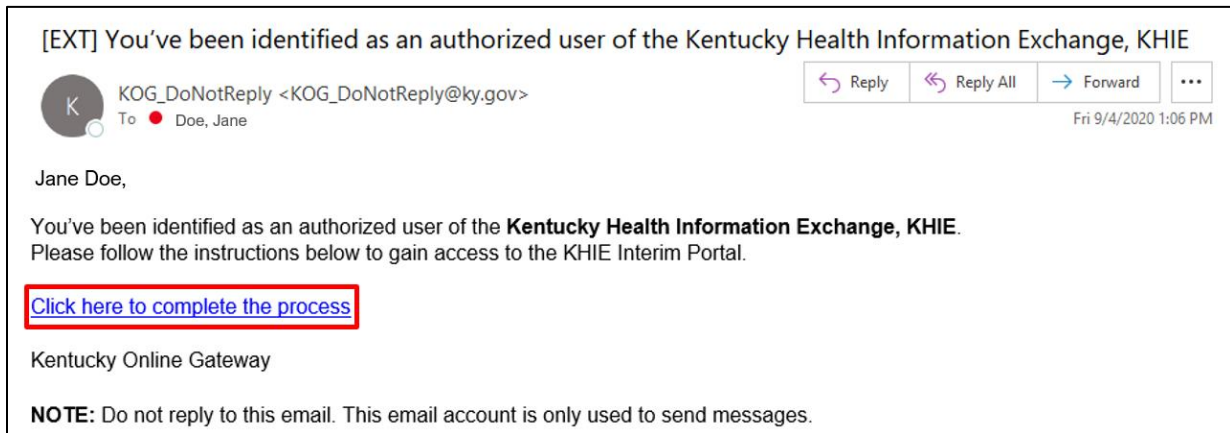
Additional Roles for the ePartnerViewer:

Event Notification Administrator	User who has been authorized by an Organization to manage their event notifications within the ePartnerViewer.
KHIE Organization Administrator	User who has been authorized by an Organization to manage their authorized users.
Manual Data Submission	User who has been authorized by an Organization to manually enter certain reportable laboratory results in the ePartnerViewer.
Access Administrator	User who has been authorized by an Organization to review records of their authorized Clinical Users who use the 'break the glass' functionality to view a patient's chart in the ePartnerViewer.
PACS Administrator	User who has been authorized by an Organization to export radiology images to a local Picture Archiving and Communications System (PACS).
Manual Case Reporter	User who has been authorized by an Organization to manually enter case reports for communicable disease reporting.

3 KOG Registration and Login

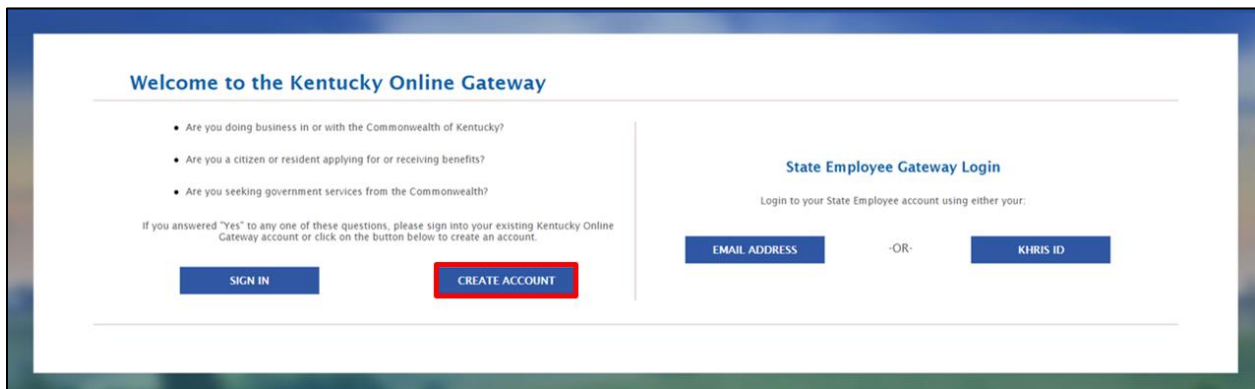
Create a KOG Account

1. When provisioned with a user role in the ePartnerViewer, you will receive an invitation email to register for the Kentucky Online Gateway (KOG).
2. To register, click the **Click here to Complete the Process** hyperlink in the Invitation email to be directed to the **Kentucky Online Gateway Registration Page**.



Please Note: This link is active for seven days. The registration link is only valid for a one-time use. If you click the link and do not complete the registration process, a new link must be sent. If the link expires, the KHIE Org Admin must send another invitation to create a Kentucky Online Gateway (KOG) account.

3. The **KOG Landing Page** displays. If you do not have an existing KOG account, click **Create Account**.



Please Note: If you already have an existing KOG account with the same email address from which you received the invitation to enroll, do not create a new account. Log into KOG using your existing credentials.

4. Enter Registration Information. Mandatory fields are marked with asterisks (*).
5. Enter **First Name**.
6. Enter **Last Name**.
7. Enter **Email Address**.

Please complete your Kentucky Online Gateway Profile

ⓘ If you already have an existing Kentucky Online Gateway (KOG) Account, please click [here](#) to reset your password OR click on the CANCEL button below to log into your account.

Please fill out the form below and click **Sign Up** when finished.
All fields with * are required.

* First Name Middle Name * Last Name

* E-Mail Address * Verify E-Mail Address

* Password * Verify Password

Mobile Phone Language Preference

Please Note: You MUST register using the same email address from which you received the invitation to enroll.

8. Confirm **Email Address**.
9. Enter **Password**.
10. Confirm **Password**.
11. Enter **Street Address, City, State, and Zip Code**.
12. Enter **Answer** to Security *Question 1*.
13. Enter **Answer** to Security *Question 2*.

Mobile Phone Language Preference

Street Address 1 Street Address 2

City State Zip Code

Question * Answer

Question * Answer

14. After completing the mandatory fields, click **Sign Up**.

Please complete your Kentucky Online Gateway Profile

i If you already have an existing Kentucky Online Gateway (KOG) Account, please click [here](#) to reset your password OR click on the CANCEL button below to log into your account.

Please fill out the form below and click **Sign Up** when finished.
All fields with * are required.

* First Name <input type="text" value="Jane"/>	Middle Name <input type="text" value="L"/>	* Last Name <input type="text" value="Doe"/>
* E-Mail Address <input type="text" value="jane.doe@gmail.com"/>	* Verify E-Mail Address <input type="text" value="jane.doe@gmail.com"/>	
* Password <input type="password" value="....."/>	* Verify Password <input type="password" value="....."/>	
Mobile Phone <input type="text" value="(999) 999-9999"/>	Language Preference <input type="text" value="English"/>	
Street Address 1 <input type="text" value="11 Mill Creek Park"/>	Street Address 2 <input type="text"/>	
City <input type="text" value="Frankfort"/>	State <input type="text" value="Kentucky"/>	Zip Code <input type="text" value="40601"/>
Question <input type="text" value="In what city were you born? (Enter full name of city only)"/>	* Answer <input type="text" value="Frankfort"/>	
Question <input type="text" value="What was the name of your first pet?"/>	* Answer <input type="text" value="Fido"/>	

CANCEL SIGN UP

15. After clicking **Sign Up**, you'll be directed to a screen displaying the following message: *Your account has been requested and is pending email verification. Please check your email and click on the link provided to verify your account.*

16. You must check your email to complete the KOG Account Validation process.

MYKY
MyKentucky.gov

FAQ | Help | English

Please complete your Kentucky Online Gateway Profile

YOU HAVE 4 HOURS TO COMPLETE THE PROCESS

✔ Your account has been requested and is pending email verification. Please check your email and click on the link provided to verify your account. If you do not see the verification email in your inbox, please check your spam or junk folder. If no email was received [click here](#).

If you have already verified your account by clicking the link provided in the email, please click on **SIGN IN** button to continue.

SIGN IN

Please Note: If the verification email is not in the inbox, check the *Junk* and *Spam* folders.

KOG Account Validation

17. You will receive an email at the email address you provided when you created the account. This email is titled *Account Verification* from [KOG DoNotReply@ky.gov](mailto:KOG_DoNotReply@ky.gov).

From: KOG_DoNotReply <KOG_DoNotReply@ky.gov>
Date: September 4, 2020 at 1:31:47 PM EDT
To: jane.doe@gmail.com
Subject: Account Verification
Reply-To: <KOG_DoNotReply@ky.gov>

Jane Doe (jane.doe@gmail.com)

This email is to help you complete the last step of account set-up.

Your Org User account username is: jane.doe@gmail.com

Click on the below link now, to activate your account.

<https://kog.chfs.ky.gov/public/fwlink/?linkid=7cf0b4e1-9d40-420e-be22-c54118a26aba>

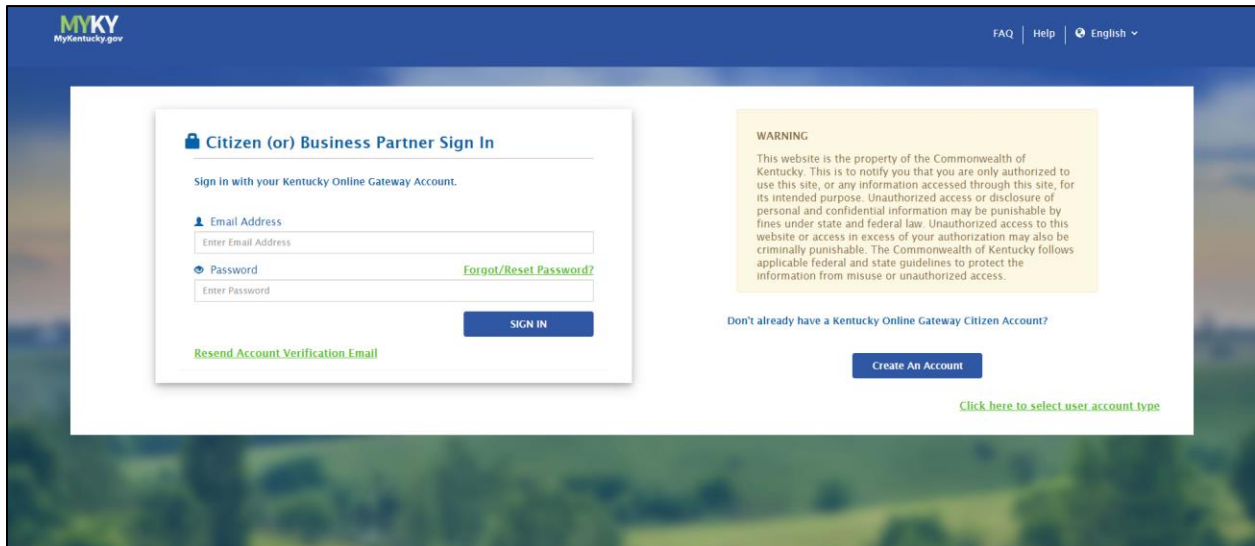
If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
[Kentucky Online Gateway HelpDesk](#)

NOTE: Do not reply to this email. This email account is only used to send messages.

Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

18. Click the **link** in the email to be directed to the **KOG Login Page**.



The screenshot shows the KOG Login Page. At the top left is the MYKY MyKentucky.gov logo. At the top right are links for FAQ, Help, and a language dropdown set to English. The main content area is divided into two columns. The left column is titled "Citizen (or) Business Partner Sign In" and contains a sign-in form with fields for "Email Address" and "Password", a "SIGN IN" button, and a link to "Resend Account Verification Email". The right column contains a "WARNING" box with text about unauthorized access, a link for "Don't already have a Kentucky Online Gateway Citizen Account?", a "Create An Account" button, and a link to "Click here to select user account type".

19. To register a phone number, you will have the option to receive a passcode via text.

- To register a phone number, enter a phone number and click **Send Passcode**.
- If you do not want to register a phone number, click **Skip and Continue** to proceed.

20. Click **Continue to Sign in** to navigate to the **KOG Login Page** and complete the account creation process.

21. On the **KOG Login Page**, enter your **Email Address**.

Please Note: You must enter the email address you provided when you created your KOG account.

22. Enter your **Password**.

Please Note: Your password is the password provided when you created your KOG account.

23. Click **Sign In** to access the ePartnerViewer.

Citizen (or) Business Partner Sign In

Sign in with your Kentucky Online Gateway Account.

Email Address
jane.doe@gmail.com

Password
..... [Forgot/Reset Password?](#)

SIGN IN

[Resend Account Verification Email](#)

WARNING

This website is the property of the Commonwealth of Kentucky. This is to notify you that you are only authorized to use this site, or any information accessed through this site, for its intended purpose. Unauthorized access or disclosure of personal and confidential information may be punishable by fines under state and federal law. Unauthorized access to this website or access in excess of your authorization may also be criminally punishable. The Commonwealth of Kentucky follows applicable federal and state guidelines to protect the information from misuse or unauthorized access.

[Don't already have a Kentucky Online Gateway Citizen Account?](#)

Create An Account

[Click here to select user account type](#)

24. After logging in, you have the option to register as an organ donor.

- To register as an organ donor, click **Yes, Register Now**.
- If you do not want to register as an organ donor, click **Remind me later** to proceed to the ePartnerViewer.

Register as a Kentucky Organ Donor

With the passing of KY SB77 and in partnership with Donate Life Kentucky, the Kentucky Online Gateway has created the below form for Kentuckians to join the Kentucky Organ Donor Registry. If you'd like to join the KYDR, please fill out the required fields below, select the consent checkbox, and click the "Register" button. For more information on what it means to be an organ donor, please visit <https://donatelifeky.org/why-donate/>.

* First Name: Jane
Middle Name:
* Last Name: Doe

Register as a Kentucky Organ Donor

? Would you like to register as an organ donor?

With the passing of KY SB77 and in partnership with Donate Life Kentucky, the Kentucky Online Gateway has created an online portal for Kentuckians to join the Kentucky Organ Donor Registry. For more information on what it means to be an organ donor, please visit <https://donatelifeky.org/why-donate/>

Yes, Register Now **Remind me later**

By submitting this registration I affirm that I am the applicant described on this application and that the information entered herein is true and correct to the best of my knowledge. This form will serve as donor document of gift as outlined in the Uniform Anatomical Gift Act. A document of gift, not revoked by the donor before death, is considered legal authorization for donation and does not require the consent of another. If I am under 18 years of age, I understand that consent must be obtained from my parents or legal guardian at the time of donation.

I have read, understand, and agree to the above terms and conditions

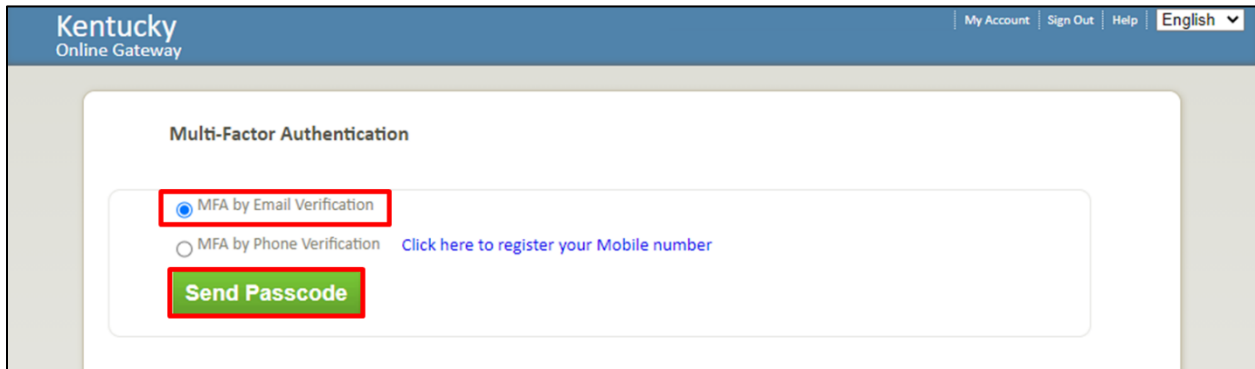
Register [Continue to the Application](#)

Multi-Factor Authentication

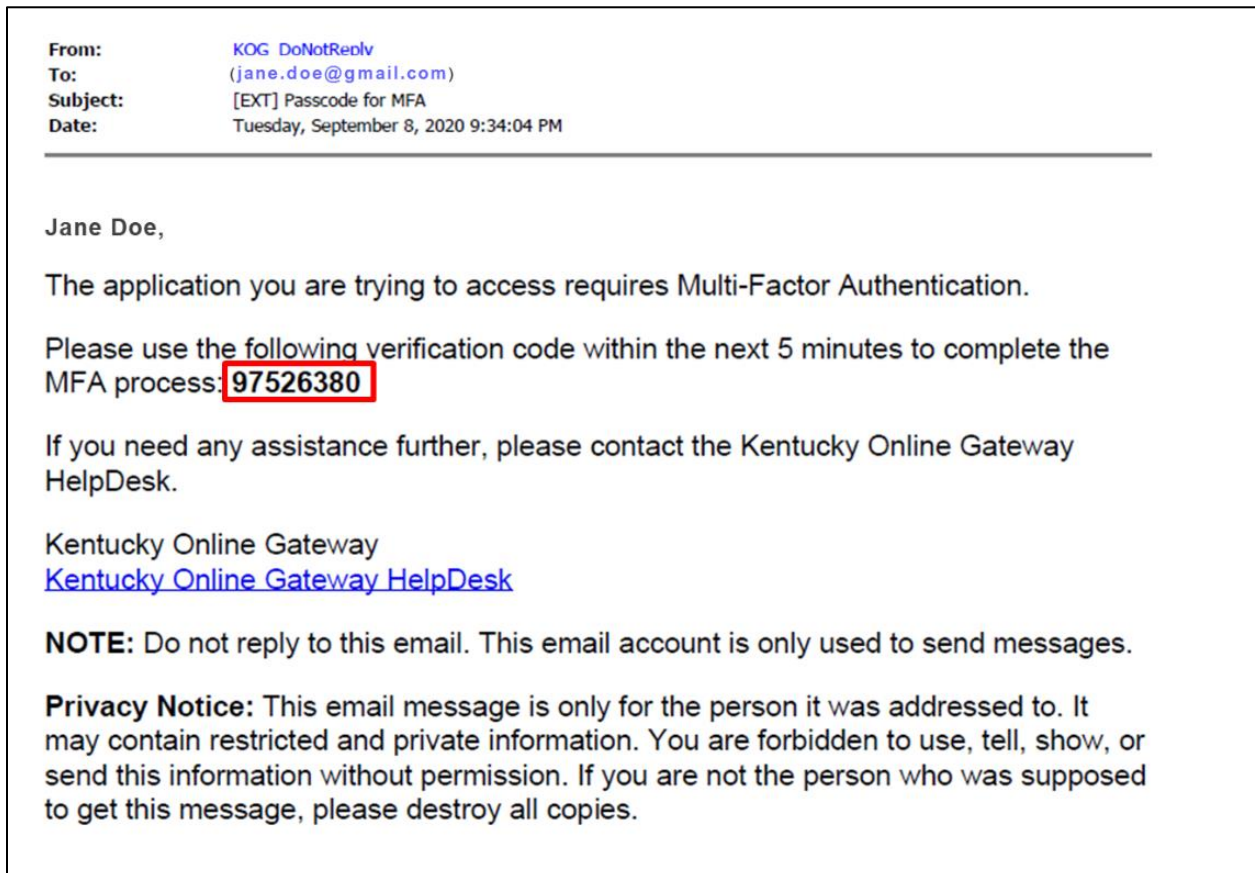
After login, complete Multi-Factor Authentication or MFA. You have the option to receive an MFA passcode by Email or Text.

MFA by Email Verification

25. To receive the MFA passcode by email, select the **MFA by Email Verification** button and click **Send Passcode**.



26. You will receive an email titled *Passcode for MFA* from [KOG DoNotReplay@ky.gov](mailto:KOG_DoNotReplay@ky.gov). You must open that email in a separate tab.



From: KOG DoNotReplay
To: (jane.doe@gmail.com)
Subject: [EXT] Passcode for MFA
Date: Tuesday, September 8, 2020 9:34:04 PM

Jane Doe,

The application you are trying to access requires Multi-Factor Authentication.

Please use the following verification code within the next 5 minutes to complete the MFA process: **97526380**

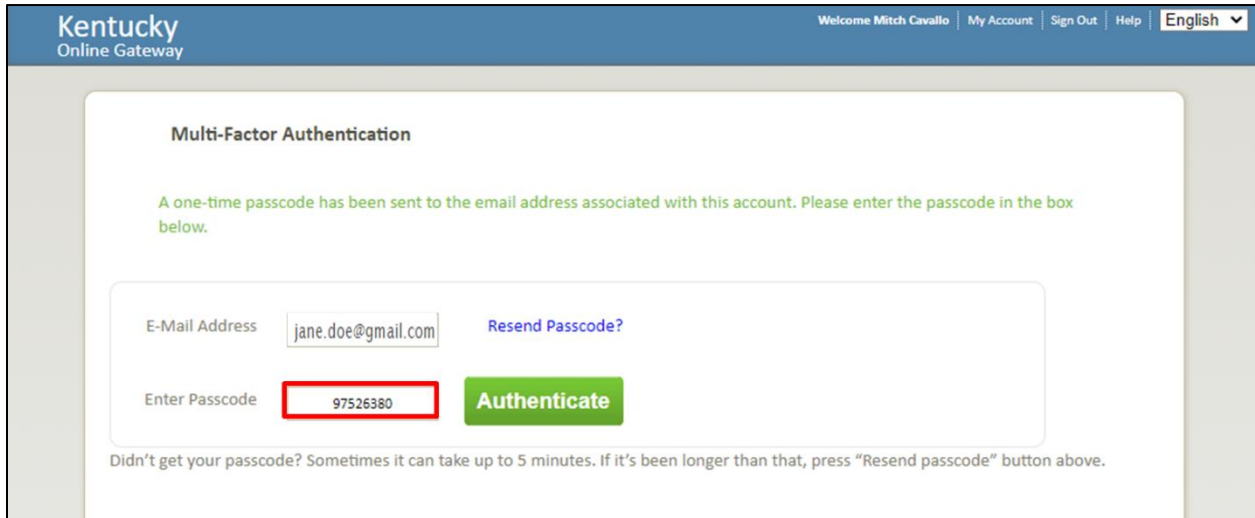
If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
[Kentucky Online Gateway HelpDesk](#)

NOTE: Do not reply to this email. This email account is only used to send messages.

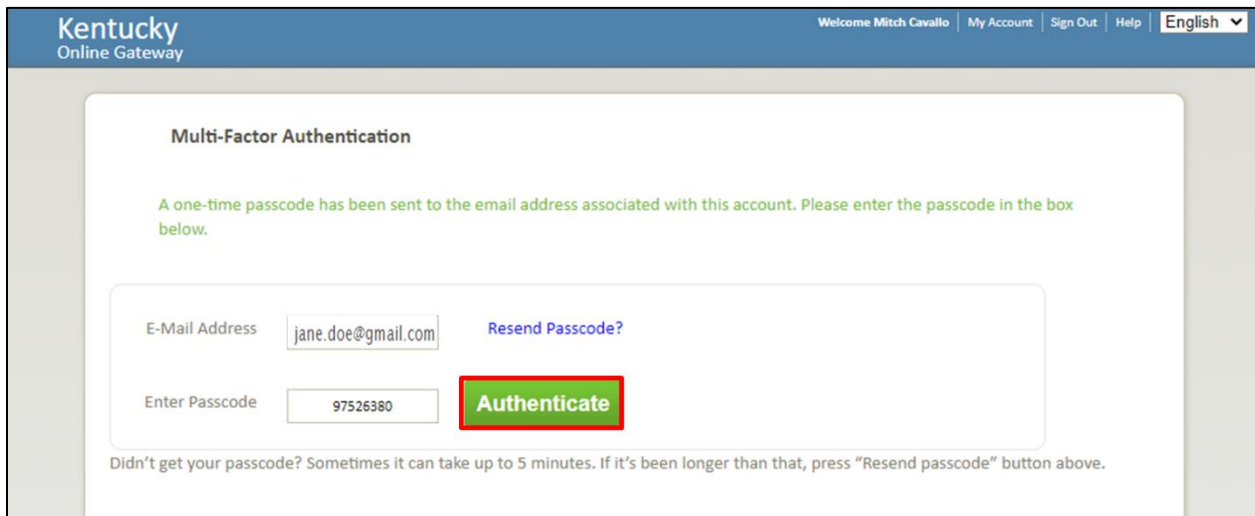
Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

27. Enter the **8-digit code** that is in the body of the email into the *Enter Passcode* field on the **Multi-Factor Authentication** screen.



The screenshot shows the 'Multi-Factor Authentication' page of the Kentucky Online Gateway. At the top, there is a navigation bar with the text 'Kentucky Online Gateway' on the left and 'Welcome Mitch Cavallo | My Account | Sign Out | Help | English' on the right. The main content area has a title 'Multi-Factor Authentication' and a green message: 'A one-time passcode has been sent to the email address associated with this account. Please enter the passcode in the box below.' Below this is a form with two input fields: 'E-Mail Address' containing 'jane.doe@gmail.com' and a blue link 'Resend Passcode?'. The second field is 'Enter Passcode' containing the number '97526380', which is highlighted with a red rectangular border. To the right of this field is a green button labeled 'Authenticate'. At the bottom of the form, there is a note: 'Didn't get your passcode? Sometimes it can take up to 5 minutes. If it's been longer than that, press "Resend passcode" button above.'

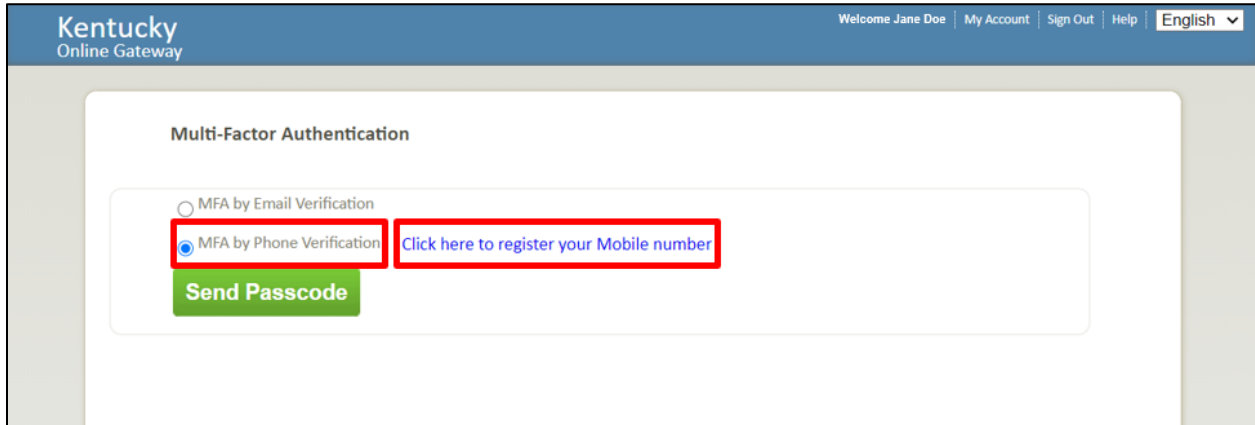
28. Click **Authenticate** to be directed to the **Terms and Conditions** page in the ePartnerViewer.



This screenshot is identical to the one above, showing the 'Multi-Factor Authentication' page. However, in this version, the 'Authenticate' button is highlighted with a red rectangular border, indicating the next step in the process. All other elements, including the navigation bar, the message, the email address field, the passcode field, and the 'Resend Passcode?' link, remain the same.

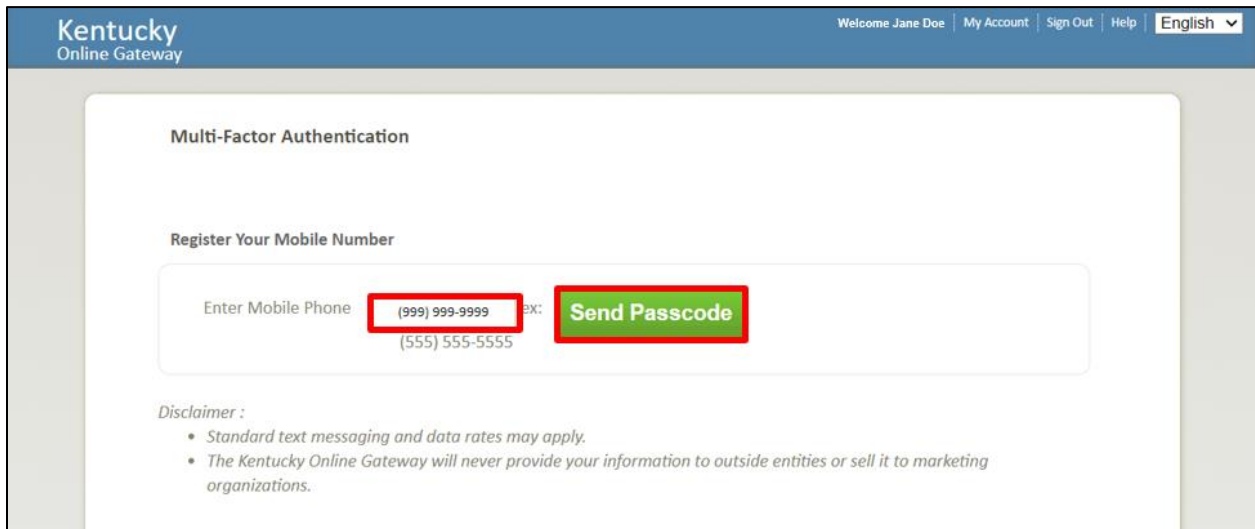
MFA by Phone Verification

29. To receive the MFA passcode by text, click the **MFA by Phone Verification** button.
30. If you have not registered your phone number, select **Click here to register your Mobile number**.



The screenshot shows the 'Kentucky Online Gateway' header with user information: 'Welcome Jane Doe | My Account | Sign Out | Help | English'. The main content area is titled 'Multi-Factor Authentication'. It contains two radio button options: 'MFA by Email Verification' (unselected) and 'MFA by Phone Verification' (selected). A red box highlights the 'MFA by Phone Verification' option and a link that says 'Click here to register your Mobile number'. Below these options is a green button labeled 'Send Passcode'.

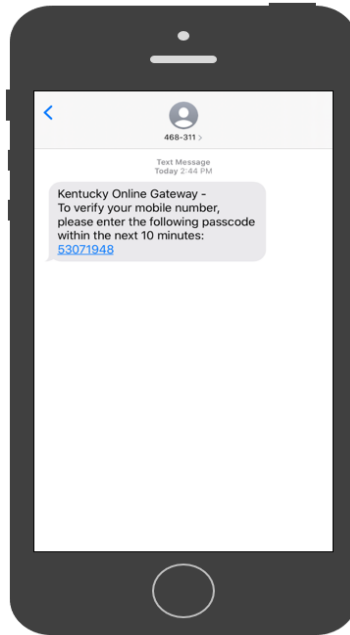
31. The **Register Your Mobile Number** screen displays for Users who have not registered their phone number. You must enter your **mobile phone number** and click **Send Passcode**.



The screenshot shows the 'Kentucky Online Gateway' header with user information: 'Welcome Jane Doe | My Account | Sign Out | Help | English'. The main content area is titled 'Multi-Factor Authentication' and has a sub-section 'Register Your Mobile Number'. It features a text input field labeled 'Enter Mobile Phone' with a red box around the placeholder '(999) 999-9999' and another red box around the placeholder '(555) 555-5555'. To the right of the input field is a green button labeled 'Send Passcode'. Below the input field is a 'Disclaimer' section with two bullet points: 'Standard text messaging and data rates may apply.' and 'The Kentucky Online Gateway will never provide your information to outside entities or sell it to marketing organizations.'

Please Note: The **Register Your Mobile Number** screen does not display for Users who have already registered their phone number. Instead, these Users will be prompted to enter the passcode to validate and verify identify on the **Multi-Factor Authentication** screen.

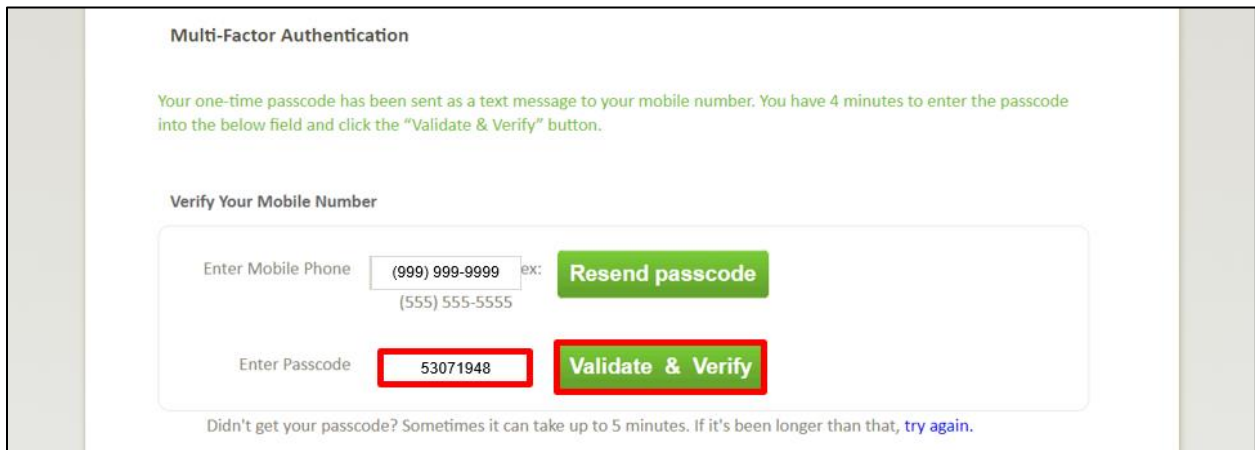
32. You will receive a text message from the Kentucky Online Gateway that will include a passcode that will be used for verification.



Please Note: It may take up to 5 minutes to receive the passcode via text message. Click **Resend passcode** if you do not receive the text message within 5 minutes.

33. To verify the mobile number, enter the **8-digit code** from the text message into the *Enter Passcode* field on the **Multi-Factor Authentication** screen.

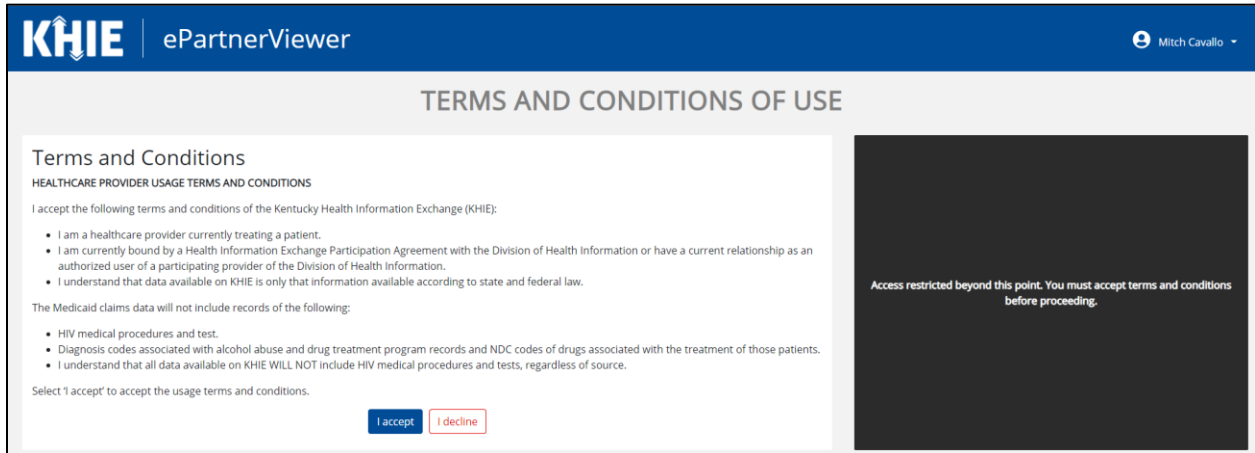
34. Click **Validate & Verify** to be directed to the **Terms and Conditions of Use** page in the ePartnerViewer.



Please Note: You must enter the passcode within 5 minutes of receiving the text message.

4 Terms of Use and Logging In

After logging into the Kentucky Online Gateway and completing Multi-Factor Authentication, the **Terms of Conditions and Use** page displays. Privacy and security obligations are outlined here.



KHIE | ePartnerViewer Mitch Cavallo

TERMS AND CONDITIONS OF USE

Terms and Conditions
HEALTHCARE PROVIDER USAGE TERMS AND CONDITIONS

I accept the following terms and conditions of the Kentucky Health Information Exchange (KHIE):

- I am a healthcare provider currently treating a patient.
- I am currently bound by a Health Information Exchange Participation Agreement with the Division of Health Information or have a current relationship as an authorized user of a participating provider of the Division of Health Information.
- I understand that data available on KHIE is only that information available according to state and federal law.

The Medicaid claims data will not include records of the following:

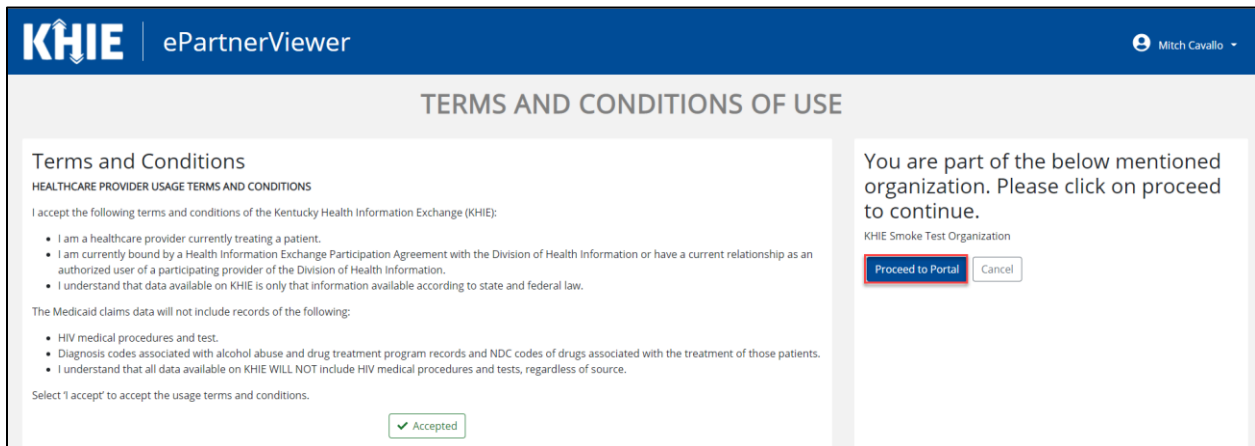
- HIV medical procedures and test.
- Diagnosis codes associated with alcohol abuse and drug treatment program records and NDC codes of drugs associated with the treatment of those patients.
- I understand that all data available on KHIE WILL NOT include HIV medical procedures and tests, regardless of source.

Select 'I accept' to accept the usage terms and conditions.

Access restricted beyond this point. You must accept terms and conditions before proceeding.

Please Note: The right side of the Portal is grayed out and displays a message that states: *Access is restricted beyond this point. You must accept the terms and conditions before proceeding.*

- Once you click **I Accept**, the grayed out section becomes visible. A message appears that indicates you are associated with a particular *Organization*. This is the name of your healthcare organization.
- Click **Proceed to Portal** to access the ePartnerViewer.



KHIE | ePartnerViewer Mitch Cavallo

TERMS AND CONDITIONS OF USE

Terms and Conditions
HEALTHCARE PROVIDER USAGE TERMS AND CONDITIONS

I accept the following terms and conditions of the Kentucky Health Information Exchange (KHIE):

- I am a healthcare provider currently treating a patient.
- I am currently bound by a Health Information Exchange Participation Agreement with the Division of Health Information or have a current relationship as an authorized user of a participating provider of the Division of Health Information.
- I understand that data available on KHIE is only that information available according to state and federal law.

The Medicaid claims data will not include records of the following:

- HIV medical procedures and test.
- Diagnosis codes associated with alcohol abuse and drug treatment program records and NDC codes of drugs associated with the treatment of those patients.
- I understand that all data available on KHIE WILL NOT include HIV medical procedures and tests, regardless of source.

Select 'I accept' to accept the usage terms and conditions.

You are part of the below mentioned organization. Please click on proceed to continue.

KHIE Smoke Test Organization

Please Note: When you click **Cancel**, you will see a pop-up notification indicating that you are *about to be logged out*. Use of the ePartnerViewer portal is subject to the acceptance of KHIE's Terms of Use. Click either **Logout Now** or **Cancel** to proceed to the ePartnerViewer.

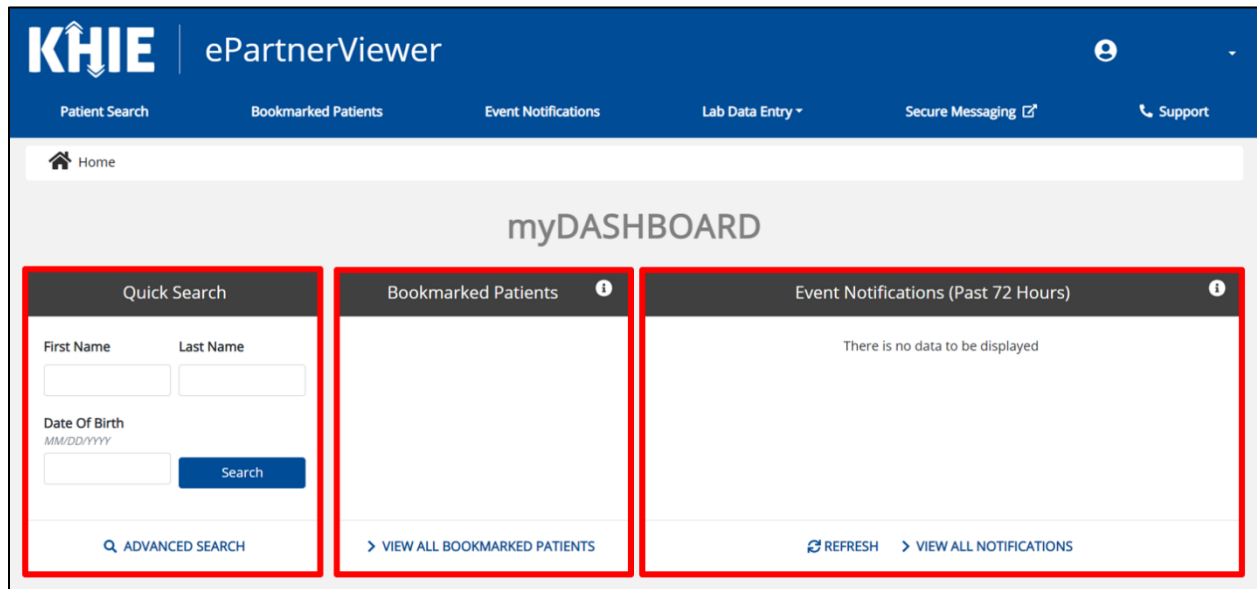
5 myDASHBOARD Overview

myDASHBOARD

Once you login, you will land on the ePartnerViewer's homepage, **myDASHBOARD**. From **myDASHBOARD**, you can quickly and easily search for a patient, view previously bookmarked patients, and review records of patients you've flagged to receive event notifications.

The **myDASHBOARD** is designed with the User in mind. It allows YOU to quickly and easily access the following functions:

- **Quick Search:** Enables you to complete a basic or advanced search using the mandatory search parameters: **First Name**, **Last Name**, and **Date of Birth**. While additional fields are optional, excluding additional criteria may produce multiple patient search results.
- **Bookmarked Patients:** Lists up to 5 of the most recent patients for whom you have elected to 'favorite' or bookmark to enable quick and easy access in the future. You can click on a patient name to go directly to that patient's chart. To see all of your Bookmarked patients, click **View all Bookmarked Patients**.
- **Event Notifications:** Displays up to 5 of the most recent notifications received over the last 72 hours for patients you've selected to receive notifications. Click **Refresh** to refresh the list of notifications. Click **View All Notifications** to see all notifications received.

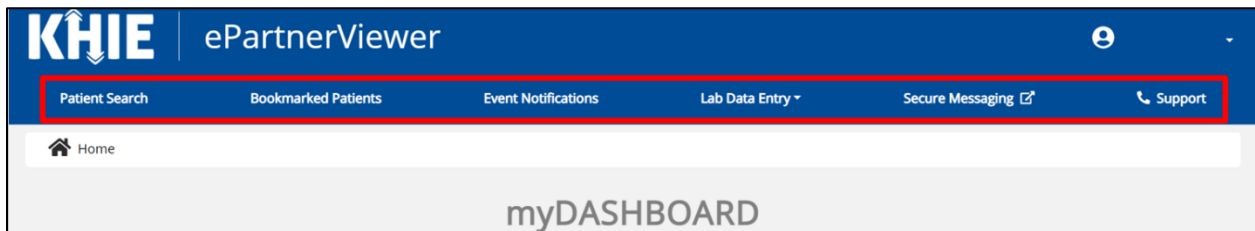


Navigation Bar

Above myDASHBOARD, in the blue Navigation Bar, Tabs provide advanced functionality. Clicking on these tabs takes you to the corresponding section in the ePartnerViewer.

The Tabs include:

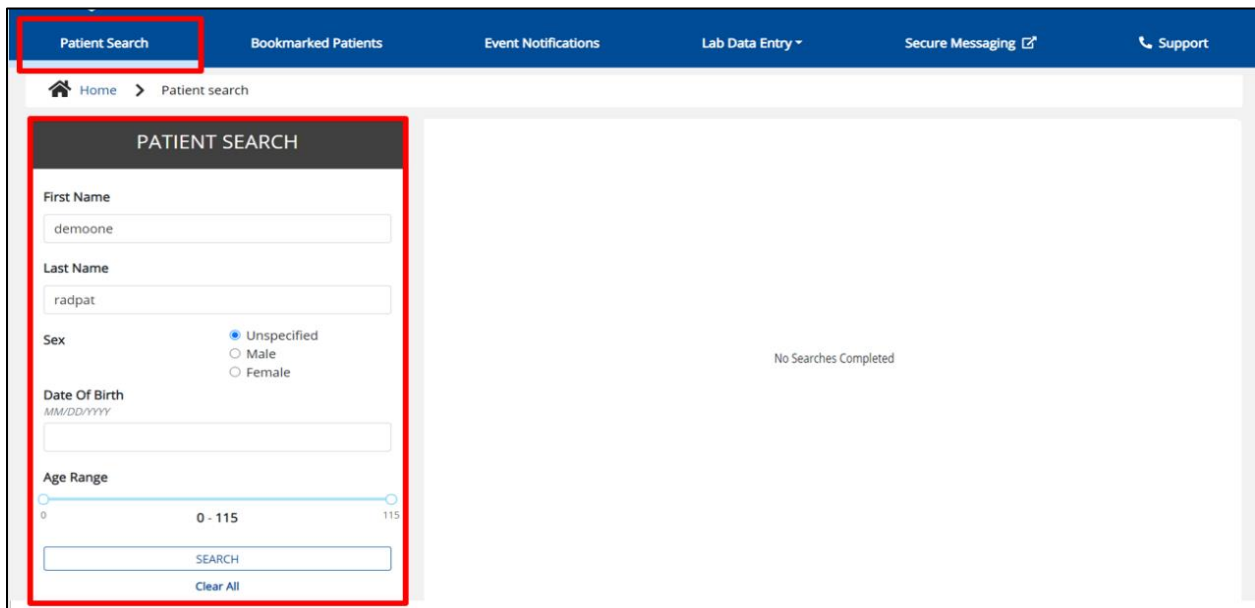
- Patient Search
- Bookmarked Patients
- Event Notifications
- Lab Data Entry
- Case Report Entry
- Secure Messaging
- Support



Please Note: The **Lab Data Entry** and the **Case Report Entry** tabs only display in the *Navigation Bar* for users with associated roles.

Patient Search Tab

Clicking on **Patient Search** enables users to complete an advanced search. How to search for a patient is covered in *Section 5 Searching for a Patient*.



Bookmarked Patients Tab

The **Bookmarked Patients** feature allows users to quickly and easily navigate to specific patients they access frequently. How to bookmark a patient is covered in *Section 9 Bookmarking Patients*.

The screenshot shows the ePartnerViewer interface with the 'Bookmarked Patients' tab selected. The page displays a list of bookmarked patients. The table below is highlighted with a red border.

PATIENT NAME	DATE OF BIRTH
BRADY, BOBBY	07/12/1970
RADPAT, DEMOONE	08/01/1983

Event Notifications Tab

Event Notifications displays recent event notifications, deleted event notifications, and allows users to manage their event notifications. How to manage event notifications is covered in *Section 11 Reviewing and Managing Event Notifications*.

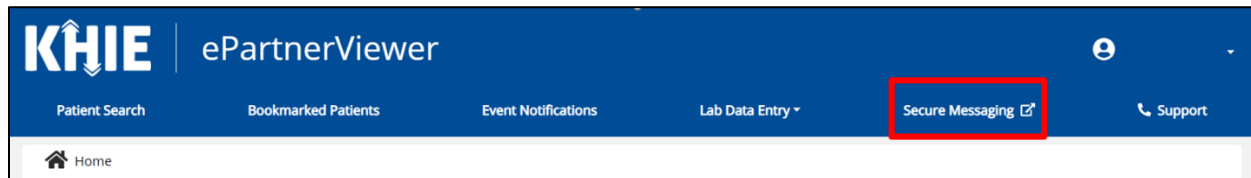
The screenshot shows the ePartnerViewer interface with the 'Event Notifications' tab selected. The page displays a list of notifications. The table below is highlighted with a red border.

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:48 am	Specialty Visit	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	09/10/2020 12:03:08 pm	08/07/2020 2:07:56 pm	Results Ready for Review	TESTWS	HOUSE,COUNTRY	20 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:55 pm	Possible Positive Test Result for COVID-19	TESTWS	ANOTHER,ILLHAVE	21 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:54 pm	Results Ready for Review	TESTWS	ANOTHER,ILLHAVE	21 years

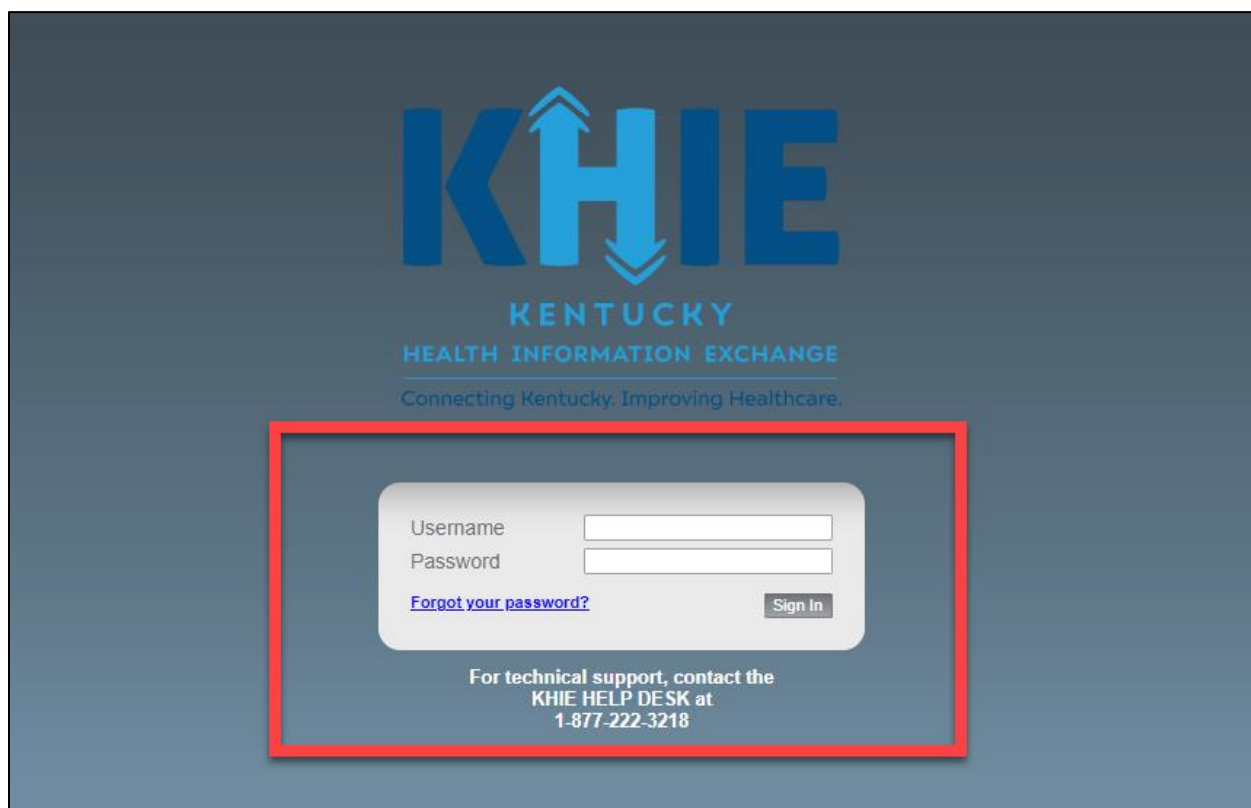
Please Note: Event Notifications are displayed only to Users who have set up this functionality for patients to receive event notifications.

Secure Messaging Tab

This feature allows Users to access KHIE’s Direct Secure Messaging (DSM) service. Direct Secure Messaging is the simple and secure method for healthcare providers to send patient health information to known and trusted recipients over a secure and encrypted network.



When you click **Secure Messaging**, you will be taken to the **CareAlign login page**. With a CareAlign account, you can send and receive direct secure messages. You can return to the ePartnerViewer by using the browser tab at the top of the screen.

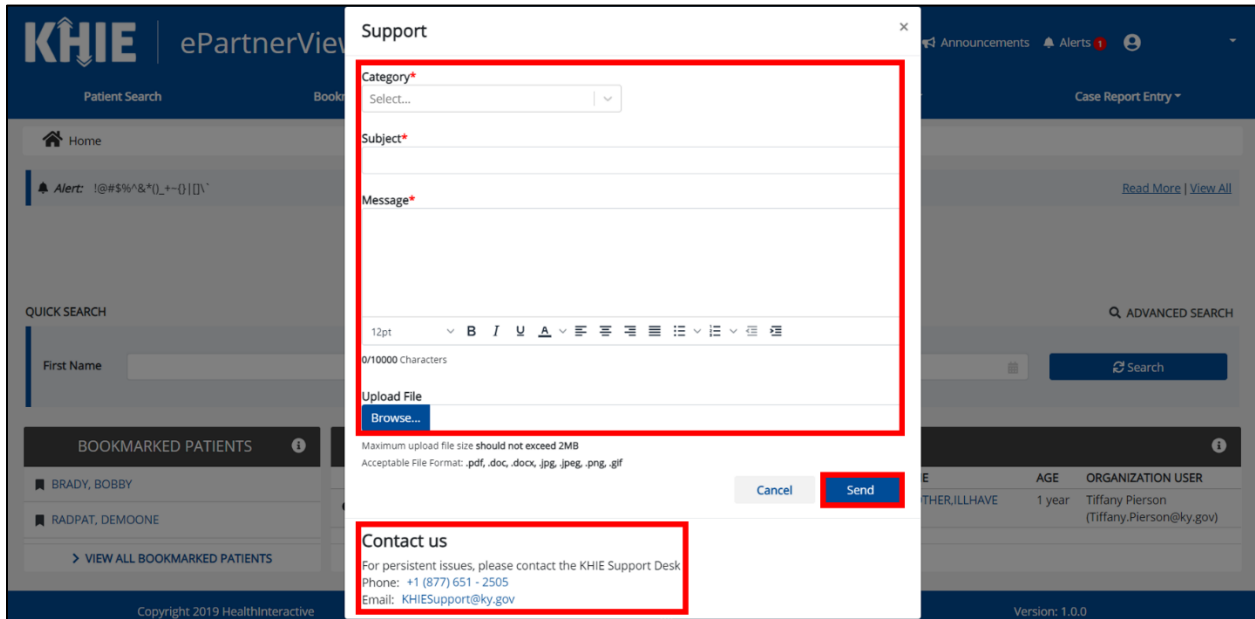
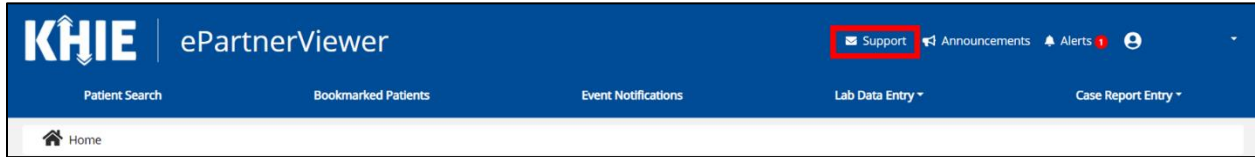


Please Note: You must have a CareAlign account. You can find information about Direct Secure Messaging and CareAlign in Resources.

KHIE hosts a Direct Email Catalog where healthcare providers can submit and share their Direct Secure email addresses. Participants may utilize this tool to search for referral partners located across the Commonwealth and its bordering states.

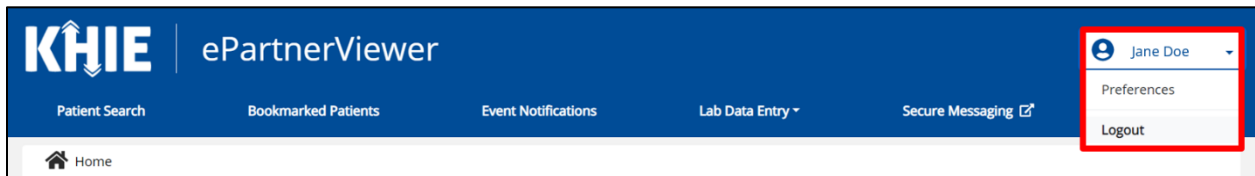
Support Tab

Clicking the Support Tab enables you to quickly seek assistance regarding the ePartnerViewer. You can easily inform us of an issue or concern, submit a question(s), or report persistent issues you may have with the ePartnerViewer. To reach us, you can call or email us using the information provided, or you may complete an online form right there in the ePartnerViewer.



User Profile

The User Profile allows you to manage your preferences and logout of the ePartnerViewer.



6 Searching for a Patient

In the ePartnerViewer, Users have two options to search for a patient. The first method is the Quick Search which can be accessed from the **myDASHBOARD** screen. The second is the Advanced Search which can be accessed from the *Navigation Bar*.

Quick Search for a Patient

1. From the *Quick Search Section* of **myDASHBOARD**, enter the Patient's **First Name** and **Last Name**. The *First Name* and *Last Name* fields are required fields.
2. Enter the Patient's **Date of Birth**. Enter 2 digits for the month, 2 digits for the day, and 4 digits for the year. (e.g. 01/01/2000).

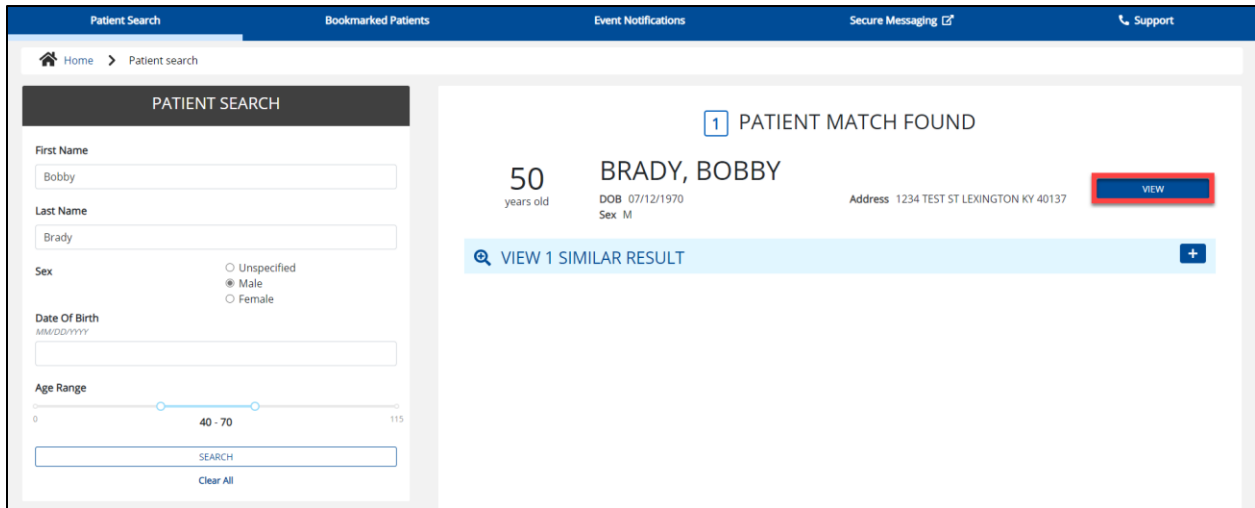
The screenshot shows the 'myDASHBOARD' interface with three main sections: 'Quick Search', 'Bookmarked Patients', and 'Event Notifications (Past 72 Hours)'. In the 'Quick Search' section, there are three input fields: 'First Name', 'Last Name', and 'Date Of Birth' (with a placeholder 'MM/DD/YYYY'). The 'First Name' and 'Last Name' fields are highlighted with red boxes. The 'Date Of Birth' field is also highlighted with a red box. A blue 'Search' button is located to the right of the 'Date Of Birth' field. Below the input fields, there are three links: 'ADVANCED SEARCH', 'VIEW ALL BOOKMARKED PATIENTS', and 'REFRESH VIEW ALL NOTIFICATIONS'.

Please Note: A search using only the patient's first and last names may return multiple patient results. Entering additional search criteria such as the date of birth may narrow the matching patient search result(s).

3. Click **Search** to search for the patient.

This screenshot is identical to the one above, showing the 'myDASHBOARD' interface. In this version, the 'Search' button in the 'Quick Search' section is highlighted with a red box, indicating the next step in the process.

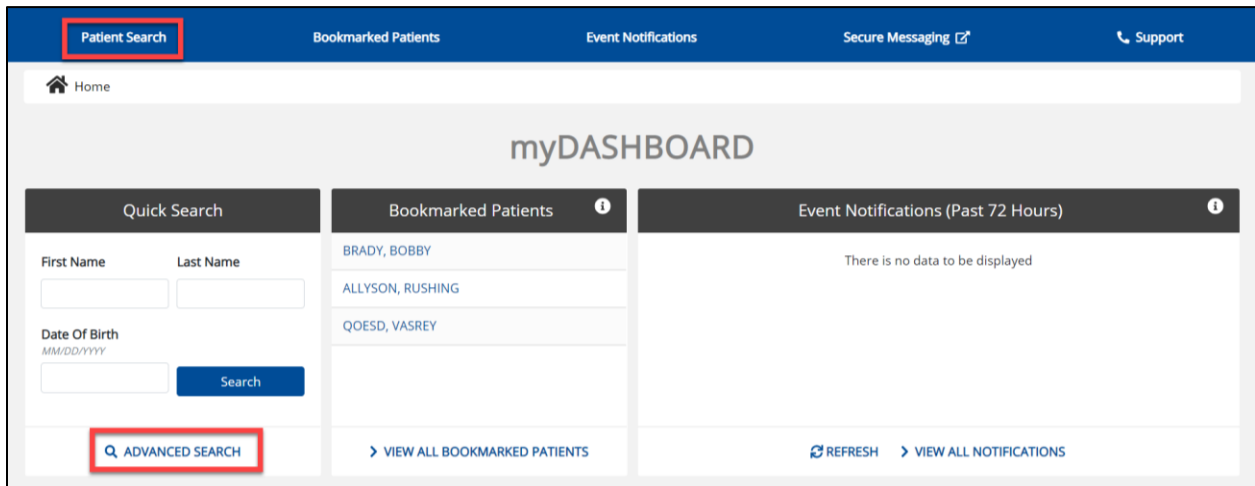
4. Click **View** to review the patient's chart.



Advanced Search

Advanced Search enables users to complete a refined search for a patient.

1. To complete an Advanced Search, click the **Patient Search** tab in the *Navigation Bar* OR click **Advanced Search** in the *Quick Search* section of **myDASHBOARD**.



2. On the **Patient Search** screen, enter the Patient's **First Name** and **Last Name**.

The screenshot shows the 'Patient Search' interface. On the left, the search criteria are: First Name 'Bobby', Last Name 'Brady', Sex 'Male', Date of Birth '07/12/1970', and Age Range '0 - 115'. On the right, a patient match is displayed for 'BRADY, BOBBY', 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A 'VIEW 1 SIMILAR RESULT' button is also visible.

Please Note: First Name and Last Name are mandatory fields. If users attempt to search for a patient without entering **First Name and Last Name**, the **Patient Search** screen displays the following messages in red under the respective fields:

- *Enter First Name*
- *Enter Last Name*

3. Select the patient's **Sex**.

4. Enter the patient's **Date of Birth**. To enter the Date of Birth, enter two digits for the month, two digits for the day, and two digits for the year.

This screenshot is similar to the previous one, but with red boxes highlighting the 'Sex' field (set to 'Male') and the 'Date of Birth' field (set to '07/12/1970').

5. Select an **Age Range** when the patient's Date of Birth is unknown.

The screenshot shows the 'Patient Search' interface. On the left, the 'PATIENT SEARCH' panel includes fields for First Name (Bobby), Last Name (Brady), Sex (Male), and Date of Birth. The 'Age Range' slider is highlighted with a red box and is set to '40 - 70'. Below the slider are 'SEARCH' and 'Clear All' buttons. On the right, the search results display '1 PATIENT MATCH FOUND' for 'BRADY, BOBBY', 50 years old, with a 'VIEW' button and a 'VIEW 1 SIMILAR RESULT' link.

6. Click **Search** to initiate the search. The search results display on the right side of the page.

This screenshot is identical to the previous one, but the 'SEARCH' button in the 'PATIENT SEARCH' panel is highlighted with a red box, indicating the next step in the process.

Please Note: Users can click **Clear All** to clear the search fields and quickly search for a new patient.

7. Select **View** to review the patient's chart.

The screenshot shows the Patient Search interface. On the left, there are search filters: First Name (Bobby), Last Name (Brady), Sex (Male selected), Date Of Birth, and Age Range (40-70). On the right, a patient match is shown for Bobby Brady, 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A red box highlights the 'VIEW' button next to the patient information.

Please Note: Depending on the search information entered by the User, patient searches may generate multiple search results. Users can click the **Plus/Minus Sign** to the right of *View Similar Result* to review or hide any similar search results and confirm the correct patient has been identified.

The screenshot shows two patient match results. The first is Bobby Brady, 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The second is Robert Brady, 50 years old, DOB 06/12/1970, Sex M, Address 154 BARBERRY LN BARDSTOWN KY 40004. A red box highlights the minus sign in the 'VIEW 1 SIMILAR RESULT' button between the two results.

7 Basic Features in the Patient Chart

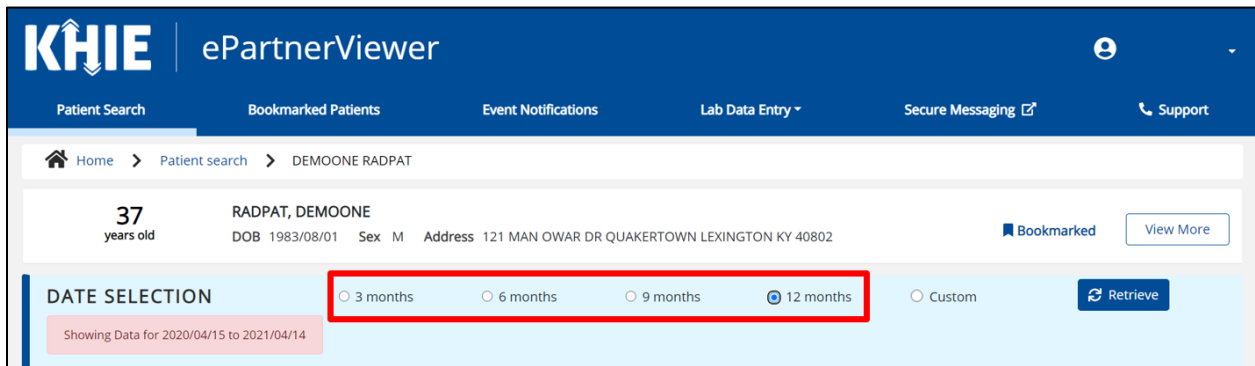
The purpose of this section is to briefly describe the basic features of the Patient Chart in the ePartnerViewer.

Date Selection

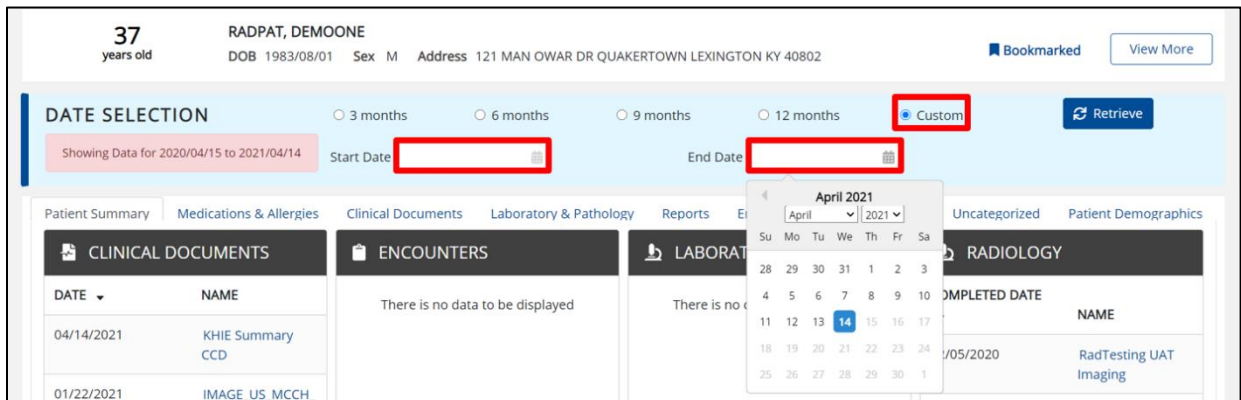
The Date Selection feature allows users to control how much data is retrieved for a patient. For example, when a search is initiated, the ePartnerViewer's **standard default** is set to retrieve the last twelve (12) months of data for a patient. You can change the default setting in *Preferences* located in the top right corner under the User Name.

Once the data is retrieved on the initial search, you can use the Date Selection radio buttons to display more or less data or do a Custom search.

1. You can select the **appropriate Data Selection radio button** to view the latest patient data within the selected time frame.
 - Select **3 months** to see the latest 3 months of patient data.
 - Select **6 months** to see the latest 6 months of patient data.
 - Select **9 months** to see the latest 9 months of patient data.
 - Select **12 months** to see the latest 12 months of patient data.



2. Select **Custom** to retrieve data for specific date range.
 - Enter the **Start Date** and the **End Date**.



Please Note: The **Start Date** and **End Date** fields only display when Users select **Custom**. **Start Date** and **End Date** are required fields when selecting the **Custom** setting; if a start date and end date are not entered, the following error message displays:

- *Error: Start Date and End Date are required fields.*

50 years old BRADY, BOBBY
DOB Jul 12 1970 Sex M Address 1234 TEST ST LEXINGTON KY 40137 Bookmarked View More

Error: Start Date and End Date are required fields.

DATE SELECTION 3 months 6 months 9 months 12 months Custom Retrieve

Showing Data for Apr 15 2020 to Apr 14 2021 Start Date: 01/01/2020 End Date: 01/01/2021

Patient Summary Medications & Allergies Clinical Documents Laboratory & Pathology Reports Encounters Immunizations Uncategorized Patient Demographics

CLINICAL DOCUMENTS ENCOUNTERS LABORATORY RADIOLOGY

3. Once a Date Selection has been made, click **Retrieve** to generate the patient's data.

37 years old RADPAT, DEMOONE
DOB 1983/08/01 Sex M Address 121 MAN OWAR DR QUAKERTOWN LEXINGTON KY 40802 Bookmarked View More

DATE SELECTION 3 months 6 months 9 months 12 months Custom Retrieve

Showing Data for 2020/04/15 to 2021/04/14 Start Date: 01/01/2020 End Date: 04/14/2021

Pagination

Throughout the patient chart, Users navigate through multiple pages of data. Using the pagination buttons, select a specific page number, move to the next or previous page, or move to the first or last page of a list.

1. Click a **Page Number** to go to that specific page in the list.
2. Click **Next** to go to following page list.
3. Click **Back** to go to the previous page list.
4. Click **First** to go to first page in the list.
5. Click **Last** to go to the last page in the list.

SHOWING 14 ITEMS

MEDICATION	PRESCRIBED BY	DETAILS	+ EXPAND ALL
Insulin Glargine, Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN		View More	
Metoprolol Succinate		View More	
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More	
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More	

First Back 1 Next Last Maximum 5 entries per page

Controlling the Number of Entries that Display

Users can control the number of entries that display per page. For example, you may prefer to see only five (5) entries per page or you may prefer to see all entries available on one page.

1. Select **5** to show five entries on the page.
2. Select **10** to show ten entries on the page.
3. Select **All** to show all the entries available on the page.

MEDICATION HISTORY APPLY FILTER

SHOWING 14 ITEMS

MEDICATION	PRESCRIBED BY	DETAILS	+ EXPAND ALL
Insulin Glargine, Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN		View More	
Metoprolol Succinate		View More	
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More	
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More	

First Back 1 Next Last

Maximum **5** entries per page

- 5
- 10
- All

Available Documents and Filter Documents

Tabs and Portlets in the Patient Summary contain lists of Available Documents for review. There are several methods of sorting and filtering these lists within the patient chart.

KHIE ePartnerViewer

Patient Search Bookmarked Patients Event Notifications Secure Messaging Support

Home Patient search BOBBY BRADY

50 years old BRADY, BOBBY DOB Jul 12 1970 Sex M Address 1234 TEST ST LEXINGTON KY 40137 Bookmarked View More

DATE SELECTION 3 months 6 months 9 months 12 months Custom Retrieve

Showing Data for Apr 15 2020 to Apr 14 2021

Patient Summary Medications & Allergies Clinical Documents Laboratory & Pathology Reports Encounters Immunizations Uncategorized Patient Demographics

LABORATORY **PATHOLOGY**

AVAILABLE DOCUMENTS
Organize Documents By...

FILTER DOCUMENTS
Search by name or title...

- 12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am
- 12/03/2020 Ethanol [Mass/volume] in Urine 6:24:00 am
- 12/03/2020 Urinalysis complete W Reflex Culture panel - Urine 6:24:00 am
- 12/03/2020 Lipid 1996 panel - Serum or Plasma 6:24:00 am
- 12/03/2020 Magnesium [Mass/volume] in Serum or Plasma 6:24:00 am
- 12/03/2020 Telicadefasine (T3) (Theanine) (FA) (Mass Based) in...

SARS CORONAVIRUS 2 RNA [PRESENCE] APPLY FILTER

ORDERING PHYSICIAN: SCOTT SPEARMAN OBSERVATION DATE: DEC 04 2020 TIME OBTAINED: 00:00

SHOWING 9 ITEMS

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal
	Has symptoms related to condition of interest	Yes			
	Date and time of symptom onset	2020-11-30			
	Employed in a healthcare setting	No			

1. Select an **Available Document** to review it. The document opens on the right side.

The screenshot shows the 'AVAILABLE DOCUMENTS' panel on the left with a search filter. The main panel displays the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report. The report includes the following information:

- ORDERING PHYSICIAN: SCOTT SPEARMAN
- OBSERVATION DATE: DEC 04 2020
- TIME OBTAINED: 00:00
- SHOWING 9 ITEMS

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal
	Has symptoms related to condition of interest	Yes			

2. To refine the list of available documents, enter a **Document Name** in *Filter Documents*.

The screenshot shows the 'AVAILABLE DOCUMENTS' panel with the filter 'Lipid' applied. The main panel displays the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report with the following information:

- ORDERING PHYSICIAN: SCOTT SPEARMAN
- OBSERVATION DATE: DEC 04 2020
- TIME OBTAINED: 00:00
- SHOWING 9 ITEMS

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

3. Select **Organize Documents By** to organize the list of available documents by date or to list all available documents.

The screenshot shows the 'AVAILABLE DOCUMENTS' panel with the 'Organize Documents By' dropdown menu open, displaying a tree view of dates: 2020, December, 12/04/2020, and 12/03/2020. The document '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am' is highlighted. The main panel displays the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report with the following information:

- ORDERING PHYSICIAN: SCOTT SPEARMAN
- OBSERVATION DATE: DEC 04 2020
- TIME OBTAINED: 00:00
- SHOWING 9 ITEMS

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

Applying a Filter

Users can apply a filter to a report to refine the display of patient data or sort for a specific piece of information. The specific filtering options vary depending on the type of report reviewed. Filters consist of drop-down menus and/or text fields.

1. Click **Apply Filter** to filter for specific information. After entering the appropriate search criteria, all applicable information displays for review.

The screenshot shows the 'MEDICATION HISTORY' report interface. At the top, there are navigation tabs: Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. Below these, there are two main sections: 'MEDICATIONS' and 'ALLERGIES'. The 'MEDICATIONS' section is active, displaying a table of medication history. The table has columns for 'MEDICATION', 'PRESCRIBED BY', and 'DETAILS', with a '+ EXPAND ALL' link on the right. The table lists five medications: Insulin Glargine, Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN; Metoprolol Succinate; Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET; Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET; and Valsartan. Each row has a 'View More' link. At the bottom of the table, there are pagination controls: 'First', 'Back', '1', '2', '3', 'Next', and 'Last'. The '1' button is highlighted. To the right of the pagination, it says 'Maximum 5 entries per page'. In the top right corner of the report area, there is a blue button labeled 'APPLY FILTER' with a downward arrow, which is highlighted with a red box.





2. Select **Hide Filter** to remove the filter.

The screenshot shows the 'MEDICATION HISTORY' report interface, similar to the previous one. The 'MEDICATIONS' section is active, displaying the same table of medication history. However, the 'MEDICATION' and 'PRESCRIBED BY' columns now have text input fields: 'Enter Medication...' and 'Enter Prescribed By...'. The 'APPLY FILTER' button is no longer visible. In the top right corner of the report area, there is a red button labeled 'HIDE FILTER' with a downward arrow, which is highlighted with a red box. The rest of the interface, including the navigation tabs, pagination controls, and table content, remains the same as in the previous screenshot.

ePartnerViewer Icons

Clinical reports in the patient chart may contain Icons that serve as visual indicators to draw attention to specific information.

Icon Descriptions:

Icon	Name	Description
	Abnormal Result	Indicates a report contains abnormal value(s)
	Critical Result	Indicates a report contains value(s) that are of a critical nature
 Bookmark	Unbookmarked Patient	Indicates the patient chart is not bookmarked; the user can elect to add the selected patient to the Bookmarked Patients list
 Bookmarked	Bookmarked Patient	Indicates the patient chart is bookmarked; the selected patient has been added to the Bookmarked Patients list

Please Note: A Reference Range Notification is a pop-up notification that informs the user that a laboratory value has been resulted based on the performing lab's reference range. This occurs when an ePartnerViewer user reviews a lab report for the first time. After clicking **Accept**, this notification does not appear on subsequent access.

8 The Patient Chart

Overview of the Patient Chart

In the ePartnerViewer, the patient chart is categorized into clinically relevant groups for easy review. Each patient chart has Tabs that contain the patient data. The Tabs include the data shared by all participating organizations and are categorized by the clinical data they display; they house the data that displays in the Portlets. The Tabs are fixed and cannot be customized.

One of the Tabs, the Patient Summary, houses the Portlets. The **Patient Chart** opens in the Patient Summary where the Portlets are designed to provide a quick and easy *Patient-at-a-Glance* view of the patient's most recent health history. The snapshot displays up to five of the most recent result reports available. The Portlets are customizable. You can arrange them in the order that is most useful for you. While the Portlet view displays the most recent health history for each clinical category, you can click *View All* located at the bottom of each Portlet to see all the data available on that patient in that category.

You may choose to view the clinical information in either the Tabs or the Portlets. The key difference between the two is that the Portlets are designed to provide a quick and easy *Patient-at-a-Glance* view of the most recent data available on a patient.

The screenshot displays the Patient Chart interface. At the top, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. A 'Retrieve' button is on the right. Below this is a 'Showing Data for 07/09/2020 to 07/08/2021' indicator. A red box labeled 'Tabs' points to a horizontal menu with the following items: Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'Patient Summary' tab is active, showing a grid of Portlets. A red box labeled 'Portlets' points to the 'CLINICAL DOCUMENTS' portlet. The grid includes: CLINICAL DOCUMENTS (with columns for DATE, NAME, START DATE, and DIAGNOSIS), ENCOUNTERS (with columns for START DATE and DIAGNOSIS), LABORATORY (with columns for COMPLETED DATE and NAME), RADIOLOGY (with columns for COMPLETED DATE and NAME), PATHOLOGY (with columns for COMPLETED DATE and NAME), TRANSCRIBED REPORTS (with columns for COMPLETED DATE and NAME), UNCATEGORIZED (displaying 'There is no data to be displayed'), and IMMUNIZATIONS (with columns for DATE and NAME). Each portlet has a 'VIEW ALL' link at the bottom. At the bottom of the grid are buttons for PROBLEMS, PROCEDURES, MEDICATIONS, and ALLERGIES.

Please Note: Authorized KASPER (Kentucky All Schedule Prescription Electronic Reporting) users will see an additional Portlet that displays the Prescription Drug Monitoring Program (PDMP) report.

Data Retrieval

The ePartnerViewer collects clinical information about a patient in stages. The patient's chart opens in the *Patient Summary*. There are three indicators that turn from blue to green as the clinical information is pulled in from various sources and is ready to review.

The screenshot shows the ePartnerViewer interface for patient Bobby Brady. At the top, there is a navigation bar with the KHIE logo and 'ePartnerViewer' text. Below this is a secondary navigation bar with options like 'Patient Search', 'Bookmarked Patients', 'Event Notifications', 'Lab Data Entry', 'Secure Messaging', and 'Support'. The main content area displays patient details: '50 years old', 'BRADY, BOBBY', 'DOB 1970/07/12', 'Sex M', and 'Address 1234 TEST ST LEXINGTON KY 40137'. There is a 'Bookmarked' indicator and a 'View More' button. Below the patient details is a 'DATE SELECTION' section with radio buttons for '3 months', '6 months', '9 months', '12 months', and 'Custom'. A slider below these options is highlighted with a red box, showing a green dot on the left and a blue dot on the right, with a green dot in the middle. Below the date selection is a 'Retrieve' button. The main content area is divided into several tabs: 'Patient Summary', 'Medications & Allergies', 'Clinical Documents', 'Laboratory & Pathology', 'Reports', 'Encounters', 'Immunizations', 'Uncategorized', and 'Patient Demographics'. The 'Clinical Documents' tab is active, showing a table with columns for 'DATE' and 'NAME'. The 'Encounters' tab is also active, showing a table with columns for 'START DATE' and 'DIAGNOSIS'. The 'Laboratory' tab is active, showing a table with columns for 'COMPLETED DATE' and 'NAME'. The 'Radiology' tab is active, showing a table with columns for 'COMPLETED DATE' and 'NAME'.

DATE	NAME
04/14/2021	UKHC - Visit Notification Note
04/14/2021	UKHC - Visit Notification Note

START DATE	DIAGNOSIS
04/14/2021	Pecked by Chicken
04/14/2021	Pecked by Chicken

COMPLETED DATE	NAME
12/04/2020	SARS coronavirus 2 RNA [Presence]
12/03/2020	Lipid 1996 panel -

COMPLETED DATE	NAME
02/27/2021	RadTesting Imaging extra
12/04/2020	XRAY LEG

As noted in *Section 7 Basic Features in the Patient Chart*, Users can control how much data is retrieved upon initial search by setting a default Date Selection option available in Preferences. Typically, the shorter the timeframe selected, the faster the data retrieval process.

Please Note: Choosing a shorter timeframe in *Date Selection* will limit the number of records available. The ePartnerViewer's standard setting is to collect the latest twelve (12) months of data.

Patient-at-a-Glance (Patient Summary)

The Patient Summary provides a snapshot of a patient's health history. Up to five of the most recent result reports and clinical documents are displayed in the Portlets, giving clinicians that *Patient-at-a-Glance view*. However, you can view all available information by clicking on *View All* located at the bottom of every Portlet.

Portlets Available

- | | | |
|----------------------|-----------------------|----------------------------|
| 1 Clinical Documents | 6 Transcribed Reports | 11 Allergies |
| 2 Encounters | 7 Immunizations | 12 Electronic Case Reports |
| 3 Laboratory | 8 Procedures | 13 Uncategorized |
| 4 Pathology | 9 Problems | 14 PDMP Program |
| 5 Radiology | 10 Medications | 15 Sensitive Data |

You can arrange and/or hide the Portlets to fit your specific needs. This is covered in *Section 12 Managing User Preferences*.

The screenshot shows the Patient Summary page for Bobby Brady, a 50-year-old male. The page includes a navigation bar with options like Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. Below the patient information, there is a DATE SELECTION section with radio buttons for 3 months, 6 months, 9 months, 12 months, and Custom. The main content area is divided into several portlets: Clinical Documents, Encounters, Laboratory, and Radiology. The Clinical Documents portlet is highlighted with a red box and contains a table of documents. The Laboratory portlet is also highlighted with a blue box and contains a table of lab results.

DATE	NAME	START DATE	DIAGNOSIS
04/15/2021	KHIE Summary CCD	04/14/2021	Pecked by Chicken
04/15/2021	KHIE Medicaid CCD	04/14/2021	Pecked by Chicken
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken
04/12/2021	UKHC - Visit Notification Note	04/09/2021	Pecked by Chicken

COMPLETED DATE	NAME
12/04/2020	SARS coronavirus 2 RNA [Presence]
12/03/2020	Lipid 1996 panel - Serum or Plasma
12/03/2020	Magnesium [Mass/volume] in Serum or Plasma
12/03/2020	Comprehensive metabolic 2000 panel - Serum or Plasma
12/03/2020	Ethanol [Mass/volume] in Urine

Please Note: When there is KASPER data available on a patient, Users with existing KASPER access can view the KASPER report in the *PDMP Program Portlet* and in the *Clinical Documents Portlet*.

KASPER Users must **use the same KOG ID linked to their KASPER account to view KASPER data in the ePartnerViewer**. KOG authenticates when an ePartnerViewer user is also an authorized KASPER user.

1. Users can view all available information by clicking on **View All** located at the bottom of every Portlet.

Patient Summary		Medications & Allergies		Clinical Documents		Laboratory & Pathology	
CLINICAL DOCUMENTS				ENCOUNTERS			
DATE ▾	NAME	START DATE ▾	DIAGNOSIS				
04/15/2021	KHIE Summary CCD	04/14/2021	Pecked by Chicken				
04/15/2021	KHIE Medicaid CCD	04/14/2021	Pecked by Chicken				
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken				
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken				
04/12/2021	UKHC - Visit Notification Note	04/09/2021	Pecked by Chicken				
> VIEW ALL CLINICAL DOCUMENTS				> VIEW ALL ENCOUNTERS			

2. Click the **Document Name** to open that specific document.

Patient Summary		Medications & Allergies		Clinical Documents		Laboratory & Pathology	
CLINICAL DOCUMENTS				ENCOUNTERS			
DATE ▾	NAME	START DATE ▾	DIAGNOSIS				
04/15/2021	KHIE Summary CCD	04/14/2021	Pecked by Chicken				
04/15/2021	KHIE Medicaid CCD	04/14/2021	Pecked by Chicken				
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken				
04/14/2021	UKHC - Visit Notification Note	04/12/2021	Pecked by Chicken				
04/12/2021	UKHC - Visit Notification Note	04/09/2021	Pecked by Chicken				

Please Note: Not all documents contain hyperlinks. Only those **Document Names** with hyperlinks can be opened to view a report in its entirety. **Document Names** with hyperlinks display as light blue text within the respective Portlet.

Reviewing the Tabs

In addition to viewing a patient's data from the Patient Summary's Portlet view, users can access the data in the patient chart by navigating the Tabs.

The **Patient Summary** tab displays the Portlets which show the most recent patient data 'at-a-glance'. The Portlets can be customized to meet your specific needs.

1. Click **Patient Summary** to view the Portlets.

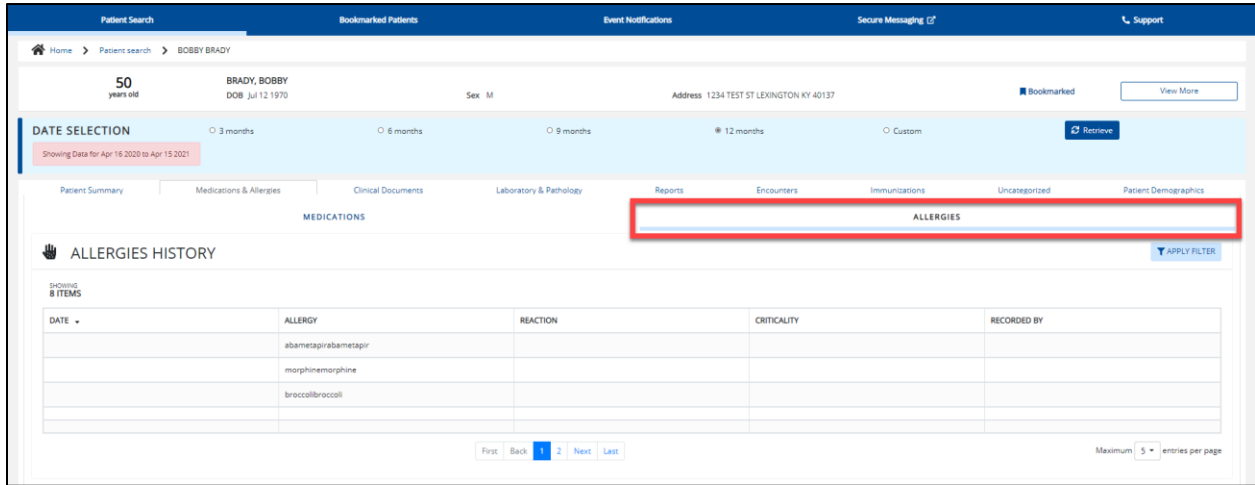
The screenshot shows the Patient Summary interface. At the top, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. Below this is a 'Showing Data for 07/09/2020 to 07/08/2021' indicator. A navigation bar contains several tabs: Patient Summary (highlighted with a red box), Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The main content area is divided into eight portlets: CLINICAL DOCUMENTS, ENCOUNTERS, LABORATORY, RADIOLOGY, PATHOLOGY, TRANSCRIBED REPORTS, UNCATEGORIZED, and IMMUNIZATIONS. A red box highlights the 'Portlets' label and the top portion of the CLINICAL DOCUMENTS and ENCOUNTERS tables. The CLINICAL DOCUMENTS table has columns for DATE, NAME, and START DATE. The ENCOUNTERS table has columns for START DATE and DIAGNOSIS. The LABORATORY table has columns for COMPLETED DATE and NAME. The RADIOLOGY table has columns for COMPLETED DATE and NAME. The PATHOLOGY table has columns for COMPLETED DATE and NAME. The TRANSCRIBED REPORTS table has columns for COMPLETED DATE and NAME. The UNCATEGORIZED portlet displays 'There is no data to be displayed'. The IMMUNIZATIONS table has columns for DATE and NAME.

The **Medications & Allergies** tab contains the patient's medication list and known allergies.

2. Click **Medications** to review the *Medication History*.

The screenshot shows the Medications & Allergies tab. At the top, there is a 'Patient Search' section with 'Bookmarked Patients', 'Event Notifications', 'Secure Messaging', and 'Support' links. Below this is a patient profile for 'BOBBY BRADY', 50 years old, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A 'DATE SELECTION' section is present with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. Below this is a 'Showing Data for Apr 18 2020 to Apr 18 2021' indicator. A navigation bar contains several tabs: Patient Summary, Medications & Allergies (highlighted with a red box), Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The main content area is divided into two sections: 'MEDICATIONS' and 'ALLERGIES'. The 'MEDICATION HISTORY' section shows a table with 14 items. The table has columns for MEDICATION, PRESCRIBED BY, and DETAILS. The medications listed are: Insulin Glargine/Hum.recanalog (Lantus Solostar) 300 Units/3 MI INSULIN.PEN, Metoprolol Succinate, AzaCalcium CarbiMag/Al Hydrex (Bayer Plus 500 Mg Caplet) 500 MG TABLET, Aconvasatin Calcium (Lipitor 10mg Tab) 10 MG TABLET, and Valparatan. Each row has a 'View More' link. At the bottom, there is a pagination control with 'First', 'Back', '1', '2', '3', 'Next', and 'Last' buttons, and a 'Maximum 5 entries per page' indicator.

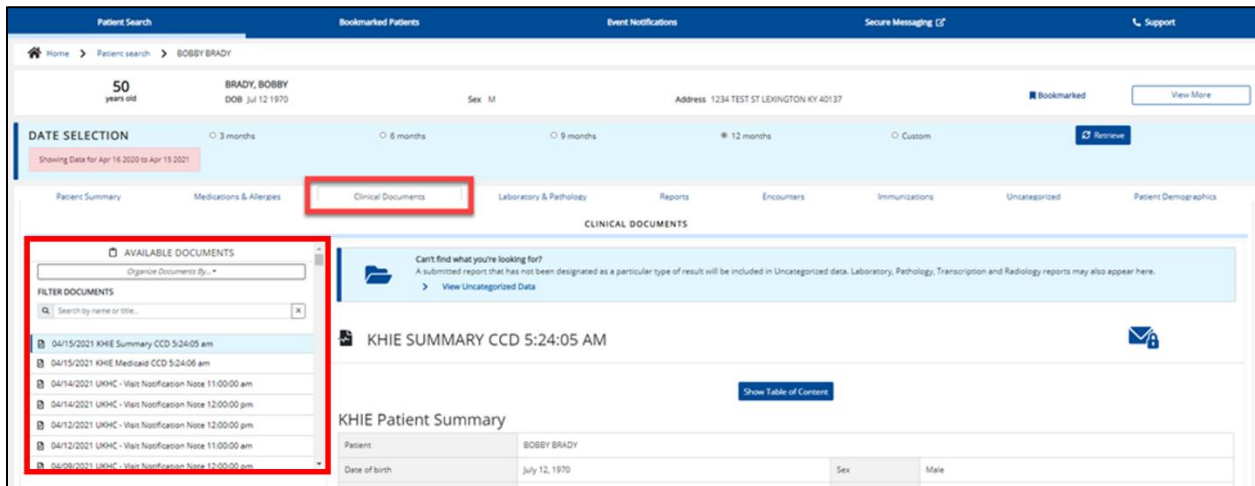
3. Click **Allergies** to review the *Allergies History*.



The **Clinical Documents** tab contains all available Continuity of Care Documents (CCDs) and other clinical summaries such as hospital admission & discharge summaries and office visit summaries.

- The **KHIE Summary CCD** represents a consolidation of most all data available on a patient all in one place for a 'one-click' quick access to a patient's health history.
- The **Medicaid Claims Data CCD** represents all of the claims paid on behalf of a Medicaid patient.

4. Click **Clinical Documents** to see a list of all *Clinical Documents*.



5. Select a **Document Name** from the *Available Documents* list located on the left side.
6. Click **Show Table of Content** to view the document's *Table of Contents*.

The screenshot shows the patient search results for Bobby Brady. The patient's age is 50, DOB is Jul 12 1970, and address is 1234 TEST ST LEXINGTON KY 40137. The 'DATE SELECTION' is set to 'Showing Data for Apr 16 2020 to Apr 15 2021'. Under the 'CLINICAL DOCUMENTS' tab, the 'AVAILABLE DOCUMENTS' list on the left includes '04/15/2021 KHIE Summary CCD 5:24:05 am', which is highlighted with a red box. To the right of this list, the document title 'KHIE SUMMARY CCD 5:24:05 AM' is displayed, and a 'Show Table of Content' button is highlighted with a red box.

This screenshot shows the 'Table of Contents' for the selected document. The table of contents is highlighted with a red box and lists the following sections: Encounters, Allergies, Medications, Problem, Functional, Social, Vital, Results, Immunizations, and Procedures.

7. Select a **Section Header** to navigate to that section of the document.

This screenshot shows the 'Table of Contents' for the selected document. The 'Encounters' section header is highlighted with a red box, indicating it has been selected for navigation.

8. Select **Back to Top** to navigate back to that document's table of contents.

Document Created: April 15, 2021, 06:44:51-0400
Authoring Device: Data from Multiple Sources
Contact Info:

Table of Contents

- Encounters
- Allergies
- Medications
- Problems
- Functional
- Social
- Vital
- Results
- Immunizations
- Procedures

Encounters

Date	Diagnosis	Clinician	Location	Provider	Source
04/14/2021	Pedict by Chosen		UHHC		University Of Kentucky Chandler Medical Center
04/14/2021	Pedict by Chosen		UHHC		University Of Kentucky Chandler Medical Center
04/12/2021	Pedict by Chosen		UHHC		University Of Kentucky Chandler Medical Center

[Back to Top](#)

9. Any document with the **Mail Icon** visible can be sent securely via Direct Secure Messaging. To send the document, click the **Mail Icon**.

Home > Patient search > BOBBY BRADY

50 years old
BRADY, BOBBY
DOB Jul 12 1970
Sex M
Address 1234 TEST ST LEXINGTON KY 40137

DATE SELECTION: 3 months, 6 months, 9 months, 12 months, Custom


Showing Data for Apr 16 2020 to Apr 15 2021

Available Documents:

- 04/15/2021 KHIE Summary CCD 5:24:05 am
- 04/15/2021 KHIE Medicaid CCD 5:24:06 am
- 04/14/2021 UHHC - Visit Notification Note 11:00:00 am
- 04/14/2021 UHHC - Visit Notification Note 12:00:00 pm
- 04/12/2021 UHHC - Visit Notification Note 11:00:00 am
- 04/12/2021 UHHC - Visit Notification Note 12:00:00 pm
- 04/09/2021 UHHC - Visit Notification Note 12:00:00 pm

CLINICAL DOCUMENTS

Can't find what you're looking for?
A submitted report that has not been designated as a particular type of result will be included in Uncategorized data. Laboratory, Pathology, Transcription and Radiology reports may also appear here.
[View Uncategorized Data](#)

KHIE SUMMARY CCD 5:24:05 AM 

[Show Table of Contents](#)

KHIE Patient Summary

Patient	BOBBY BRADY
Date of birth	July 12, 1970
Sex	Male
	123444444 M0000764 M032372545 H02020319001 M0000808 M00000790 00709664

10. Enter the **Direct Secure Email Address** of the intended recipient(s).

DATE SELECTION: 3 months, 6 months, 9 months, 12 months, Custom

Showing Data for Apr 16 2020 to Apr 15 2021

Direct Secure Email

To:

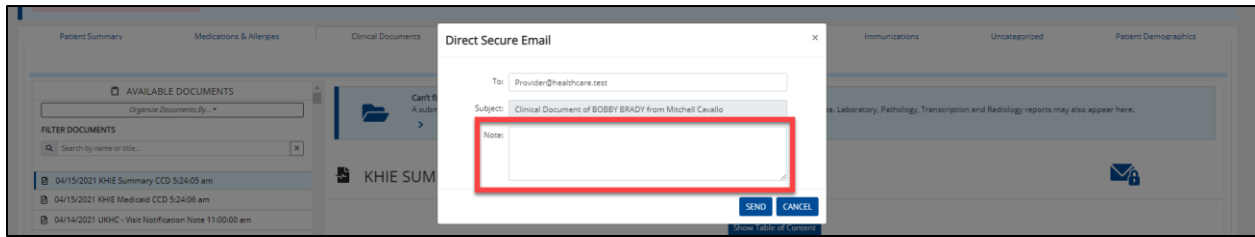
Subject: Clinical Document of BOBBY BRADY from Mitchell Cavallo

Note:

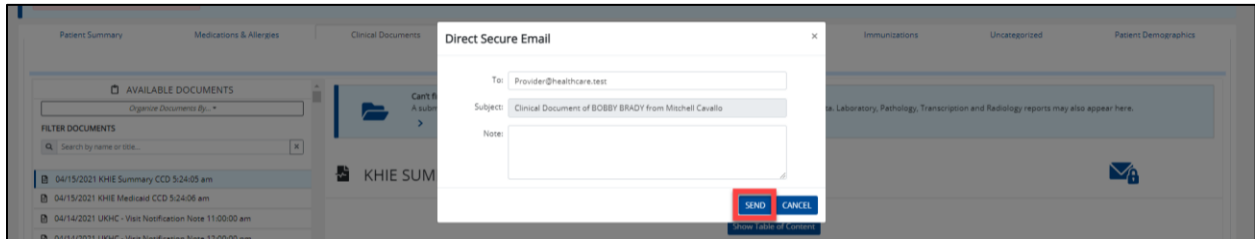
[SEND](#) [CANCEL](#)

Please Note: To send to multiple addresses at once, Users must separate individual email addresses with a semi-colon. The sender isn't required to have a direct secure email address BUT the recipient is.

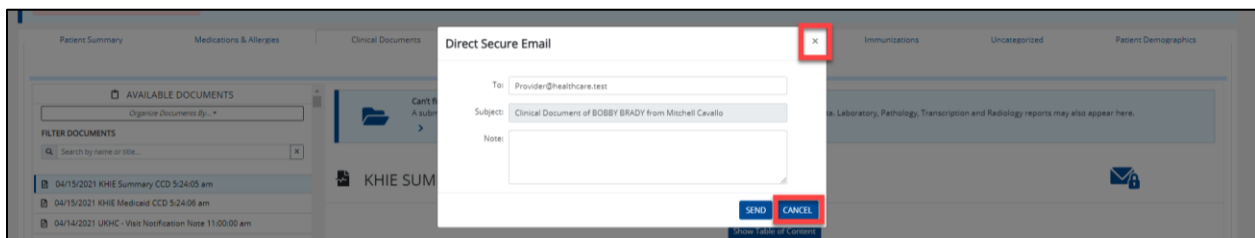
11. Enter a **Note** describing the contents and purpose of the Direct Secure Email.



12. Click **Send** to send the Direct Secure Email to recipient(s).

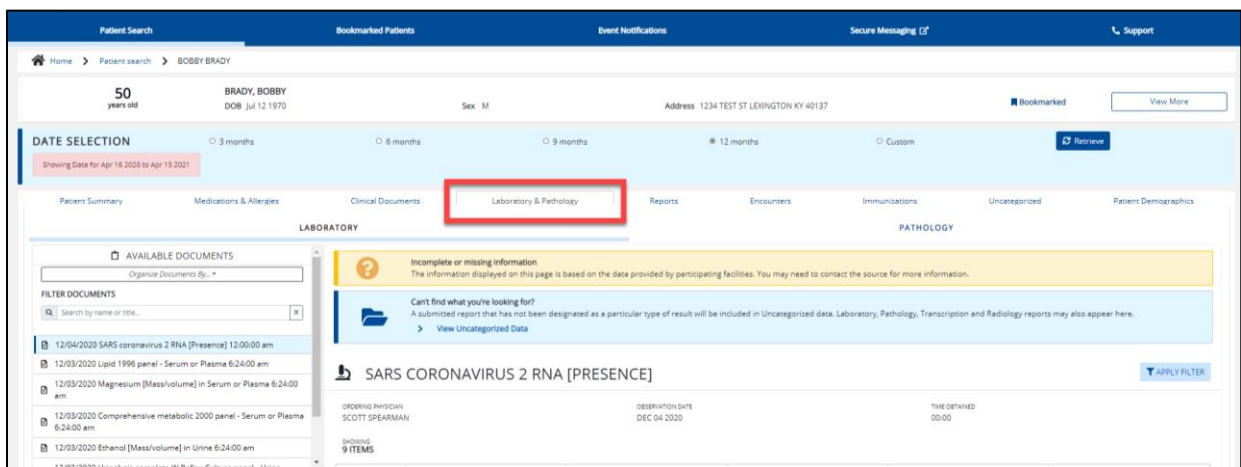


13. Click **Cancel** or click the **X** in the top right to exit the Direct Secure Email pop-up and discard the Direct Secure Email.



The **Laboratory & Pathology** tab contains a list of the laboratory and pathology result reports.

14. Click **Laboratory & Pathology** to open the Tab and review the **Laboratory & Pathology** reports.



15. Click **Laboratory** to review Laboratory result reports.

The screenshot shows the patient profile for Bobby Brady, 50 years old, with a date selection for April 16, 2020 to April 15, 2021. The navigation bar includes tabs for Patient Summary, Medications & Allergies, Clinical Documents, **Laboratory & Pathology**, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The Laboratory & Pathology tab is highlighted with a red box. Below the navigation bar, the 'AVAILABLE DOCUMENTS' section is visible on the left, and the main content area displays a report for 'SARS CORONAVIRUS 2 RNA [PRESENCE]' with a table of results.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

16. To review a Laboratory report in its entirety, select a result report from the **Available Documents** on the left side. The report will open on the right side.

This screenshot shows the same patient profile as above. The 'AVAILABLE DOCUMENTS' list on the left is expanded, and one item is selected and highlighted with a red box: '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am'. The main content area now displays the full report for 'SARS CORONAVIRUS 2 RNA [PRESENCE]' with a table of results.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

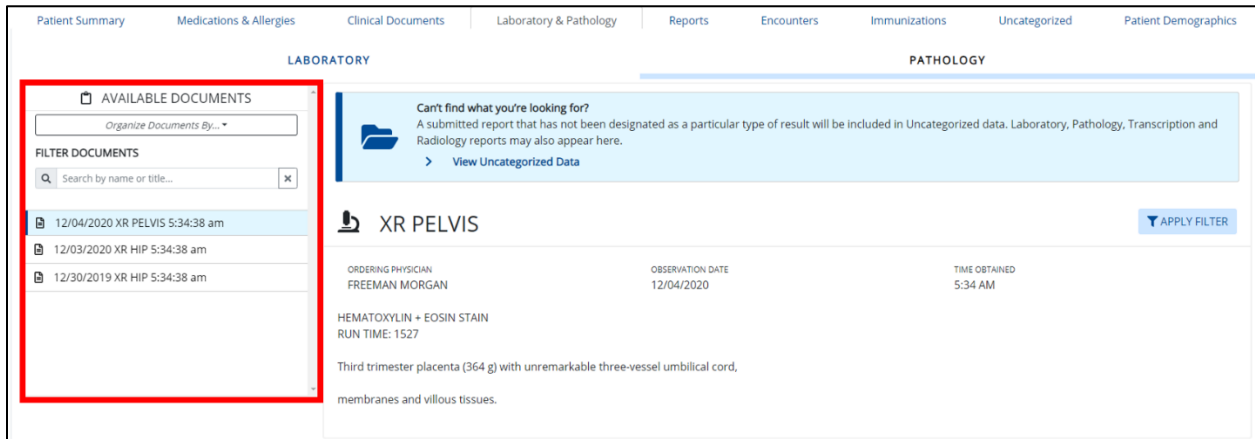
17. Click **Pathology** to review the Pathology reports.

The screenshot shows the patient profile for Bobby Brady. The navigation bar includes tabs for Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The Pathology tab is highlighted with a red box. Below the navigation bar, the 'AVAILABLE DOCUMENTS' section is visible on the left, and the main content area displays a report for 'XR PELVIS' with a text description of the findings.

XR PELVIS

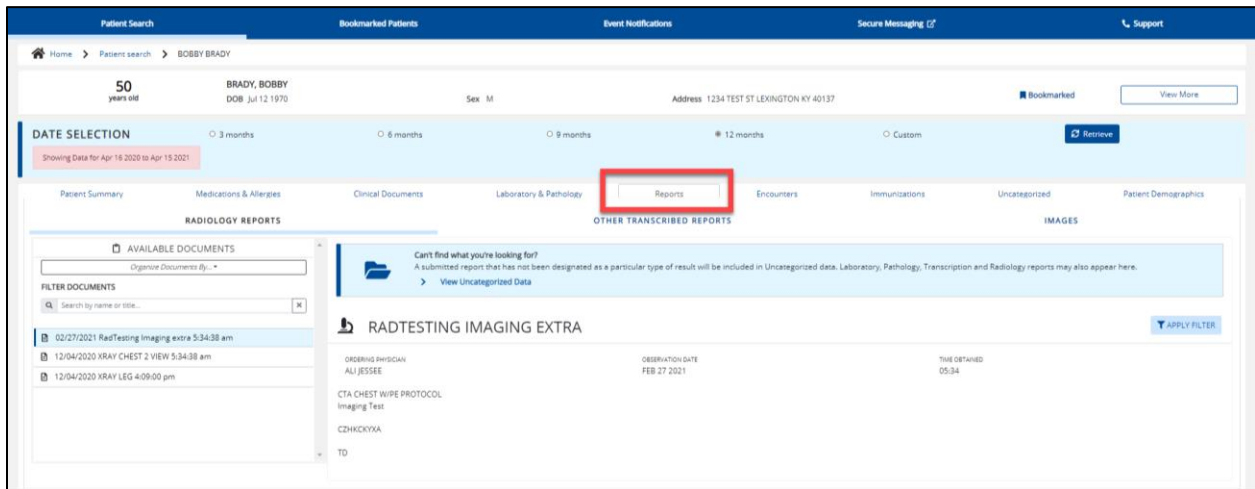
Third trimester placenta (364 g) with unremarkable three-vessel umbilical cord, membranes and villous tissues.

18. To review a Pathology report in its entirety, select a Pathology report from the **Available Documents** on the left side. The report will open on the right side.

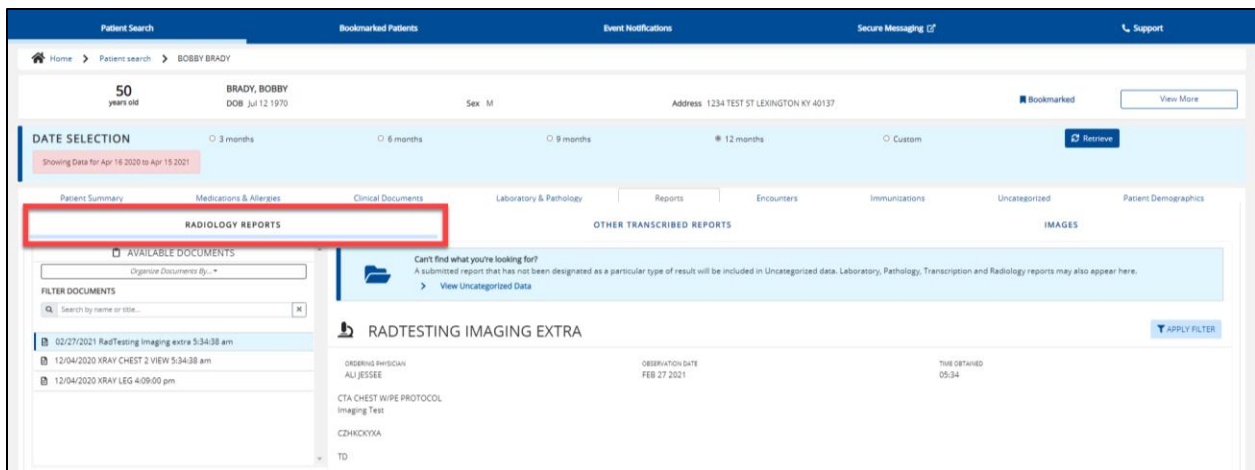


The **Reports** tab contains **Radiology Reports**, **Other Transcribed Reports**, and **Images**.

19. Click **Reports** to open the **Reports Tab** to view all reports.



20. To review radiology reports, click **Radiology Reports**.



21. To review a transcribed Radiology Report in its entirety, select a radiology report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface with a navigation bar at the top containing 'Patient Summary', 'Medications & Allergies', 'Clinical Documents', 'Laboratory & Pathology', 'Reports', 'Encounters', 'Immunizations', 'Uncategorized', and 'Patient Demographics'. Below the navigation bar, there are three tabs: 'RADIOLOGY REPORTS', 'OTHER TRANSCRIBED REPORTS', and 'IMAGES'. The 'RADIOLOGY REPORTS' tab is active, and a red box highlights the 'AVAILABLE DOCUMENTS' section on the left. This section includes a search bar and a list of documents: '02/27/2021 RadTesting Imaging extra 5:34:38 am', '12/04/2020 XRAY CHEST 2 VIEW 5:34:38 am', and '12/04/2020 XRAY LEG 4:09:00 pm'. The '12/04/2020 XRAY CHEST 2 VIEW 5:34:38 am' report is selected. The main content area on the right displays the report details for 'RADTESTING IMAGING EXTRA', including the ordering physician 'ALJ JESSEE', observation date '02/27/2021', and time obtained '5:34 AM'. The report title is 'CTA CHEST W/PE PROTOCOL Imaging Test' and the patient name is 'CZHKCKYXA TD'. There is also a 'Can't find what you're looking for?' message and a 'View Uncategorized Data' link.

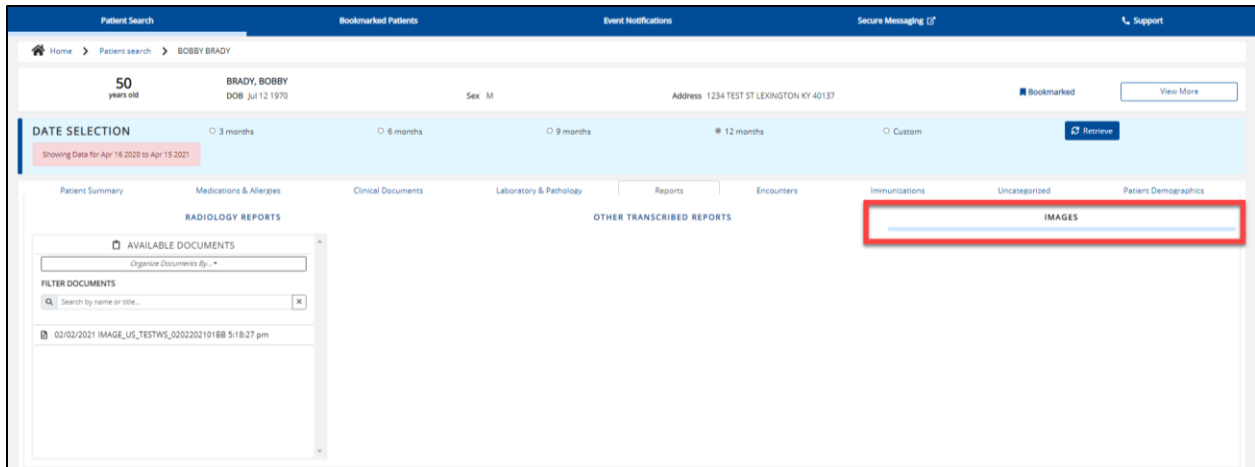
22. Click **Other Transcribed Reports** to review other types of transcribed reports.

The screenshot shows the ePartnerViewer interface for a patient named 'BRADY, BOBBY' (DOB: Jul 12 1970, Sex: M, Address: 1234 TEST ST LEXINGTON KY 40137). The 'DATE SELECTION' is set to 'Apr 18 2020 to Apr 19 2021'. The navigation bar is the same as in the previous screenshot. The 'OTHER TRANSCRIBED REPORTS' tab is active, and a red box highlights this tab. The 'AVAILABLE DOCUMENTS' section on the left shows a list of documents: '12/04/2020 History 4:51:46 am' and '12/04/2020 Allergic rhinitis 10:51:46 am'. The '12/04/2020 History 4:51:46 am' report is selected. The main content area on the right displays the report details for 'HISTORY', including the ordering physician 'S TESTDR', observation date 'DEC 04 2020', and time obtained '04:51'. The report title is 'TRANSCRIPTION NOTE 11-15-2020 Thu'. There is also a 'Can't find what you're looking for?' message and a 'View Uncategorized Data' link.

23. To review a Transcribed Report in its entirety, select a report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface for a patient named 'BRADY, BOBBY' (DOB: Jul 12 1970, Sex: M, Address: 1234 TEST ST LEXINGTON KY 40137). The 'DATE SELECTION' is set to 'Apr 18 2020 to Apr 19 2021'. The navigation bar is the same as in the previous screenshots. The 'OTHER TRANSCRIBED REPORTS' tab is active, and a red box highlights the 'AVAILABLE DOCUMENTS' section on the left. This section includes a search bar and a list of documents: '12/04/2020 History 4:51:46 am' and '12/04/2020 Allergic rhinitis 10:51:46 am'. The '12/04/2020 History 4:51:46 am' report is selected. The main content area on the right displays the report details for 'HISTORY', including the ordering physician 'S TESTDR', observation date '12/04/2020', and time obtained '4:51 AM'. The report title is 'TRANSCRIPTION NOTE 11-15-2020 Thu'. There is also a 'Can't find what you're looking for?' message and a 'View Uncategorized Data' link.

24. Click **Images** to view images.



25. To review an Image, select an image document from the **Available Documents** on the left side. The report will open on the right side. Viewing and Exporting Images is covered in section 10.



Please Note: *Section 10 Viewing and Exporting Radiology Images* covers the ePartnerViewer's imaging features in more detail.

The **Encounters** tab contains the patient's list of **Encounters**, **Problems**, and **Procedures** history.

26. Click **Encounters** to open the **Encounters Tab** to review all reports.

The screenshot shows the patient profile for Bobby Brady, 50 years old, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The interface includes a navigation bar with 'Patient Search', 'Bookmarked Patients', 'Event Notifications', 'Secure Messaging', and 'Support'. Below the patient information, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. A 'Retrieve' button is next to it. The main navigation tabs are 'Patient Summary', 'Medications & Allergies', 'Clinical Documents', 'Laboratory & Pathology', 'Reports', 'Encounters' (highlighted with a red box), 'Immunizations', 'Uncategorized', and 'Patient Demographics'. Below these tabs, there are three sub-sections: 'ENCOUNTERS', 'PROBLEMS', and 'PROCEDURES'. The 'ENCOUNTERS' section is active, showing a table with columns: START DATE, END DATE, DIAGNOSIS BY CLINICIAN, TYPE, and LOCATION. The table contains five rows of encounter data, all dated in April 2021, with diagnoses by 'Pecked by Chicken' and location 'UKHC'. A 'Filter' button is on the right. At the bottom, there are pagination controls: 'First', 'Back', '1', '2', '3', '4', 'Next', 'Last', and a 'Maximum 5 entries per page' dropdown.

27. Click **Encounters** to review the Encounters history.

This screenshot is identical to the one above, showing the patient profile for Bobby Brady. In this view, the 'ENCOUNTERS' tab in the main navigation bar is highlighted with a red box, indicating the step to click on it. The rest of the interface, including the date selection, sub-sections, and the encounter table, is the same as in the previous screenshot.

28. Click **Problems** to review the Problems History.

The screenshot shows the patient record for Bobby Brady, 50 years old, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The 'DATE SELECTION' is set to 12 months, showing data from Apr 16 2020 to Apr 15 2021. The navigation bar includes tabs for Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'PROBLEMS' tab is highlighted with a red box. Below the navigation bar, the 'PROBLEMS' section is active, showing a table with 2 items. The table has columns for DATE, NAME, CODE, and NOTE. The first row is highlighted in blue.

DATE	NAME	CODE	NOTE

29. Click **Procedures** to review the Procedure History.

The screenshot shows the patient record for Bobby Brady, 50 years old, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The 'DATE SELECTION' is set to 12 months, showing data from Apr 16 2020 to Apr 15 2021. The navigation bar includes tabs for Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'PROCEDURES' tab is highlighted with a red box. Below the navigation bar, the 'PROCEDURE HISTORY' section is active, showing a table with 9 items. The table has columns for DATE, NAME, CODE, and NOTE. The first row is highlighted in blue.

DATE	NAME	CODE	NOTE
12/08/2020	Appendectomy/Appendectomy	80146002	
05/11/2020	386053000	386053000	
05/11/2020	392230005	392230005	
05/11/2020	268400002	268400002	

The **Immunizations tab** contains the patient's immunization history.

30. Click **Immunizations** to review the Immunization History.

The screenshot shows the patient record for Bobby Brady, 50 years old, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The 'DATE SELECTION' is set to 12 months, showing data from Apr 16 2020 to Apr 15 2021. The navigation bar includes tabs for Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'IMMUNIZATIONS' tab is highlighted with a red box. Below the navigation bar, the 'IMMUNIZATION HISTORY' section is active, showing a table with 4 items. The table has columns for DATE, NAME, PROVIDER, DETAILS, and + EXPAND ALL. The first row is highlighted in blue.

DATE	NAME	PROVIDER	DETAILS	+ EXPAND ALL
			View More	
			View More	
04/15/2021	No Vaccine Administered		View More	
01/28/2020	Meningococcal MPSV4		View More	

The **Uncategorized tab** stores the Laboratory, Radiology, Pathology, and Transcription documents that came to us named in a way that our system could not categorize them appropriately. These documents contain important health information and are made available to you to review here.

31. Click **Uncategorized** to review the Uncategorized documents.

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The navigation menu at the top includes Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. The main navigation bar contains Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, **Uncategorized** (highlighted with a red box), and Patient Demographics. A yellow banner indicates 'Incomplete or missing information'. The 'UNCATEGORIZED LAB FIRST' report is displayed, showing a table with 2 items:

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	Protein (Mass/volume) in Serum or Plasma	8.1		6.4 TO 8.2	
	Bilirubin.total (Mass/volume) in Serum or Plasma	0.7		0.4 TO 1.5	

32. To review an Uncategorized report in its entirety, select a report from the **Available Documents** on the left side. The report will open on the right side.

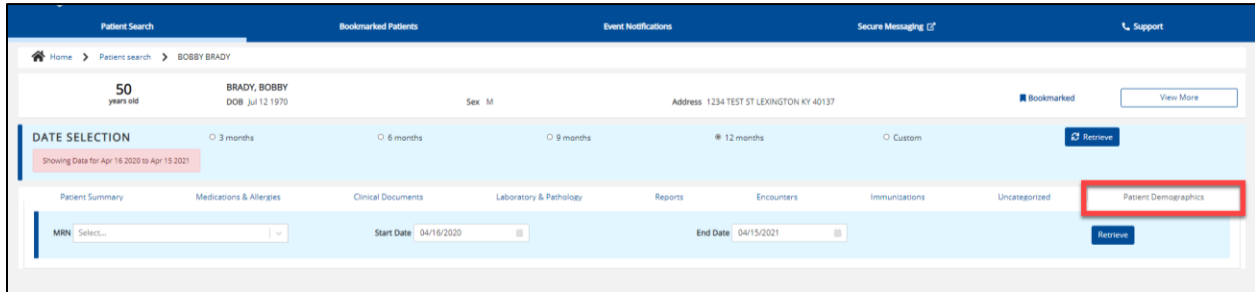
This screenshot is similar to the previous one, but the 'AVAILABLE DOCUMENTS' list on the left is highlighted with a red box. The list contains three items:

- 04/19/2020 Uncategorized Lab first 1:32:00 am
- 04/18/2020 Uncategorized Lab second 1:32:00 am
- 04/17/2020 Uncategorized Lab third 1:32:00 am

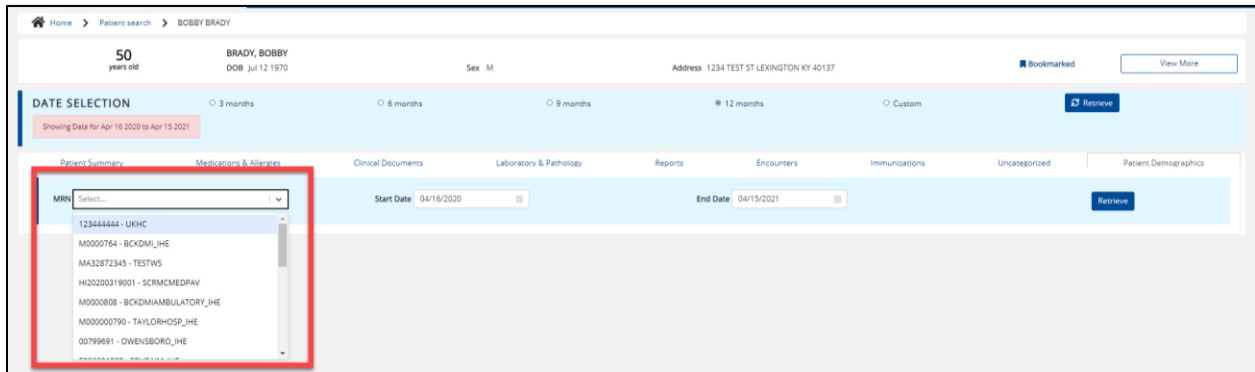
The 'UNCATEGORIZED LAB FIRST' report is still visible on the right side of the screen.

The **Patient Demographics** tab contains patient information such as next of kin, diagnosis information, insurance information, and, when available, will include the patient's extreme drug-resistant organism (XDRO) status. The default date selection is 12 months. You can enter a custom *Start* and *End* date BUT it cannot be greater than 12 months.

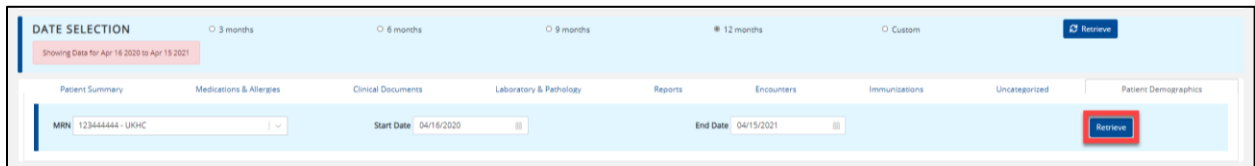
33. Click **Patient Demographics** to view the **Patient Demographics**.



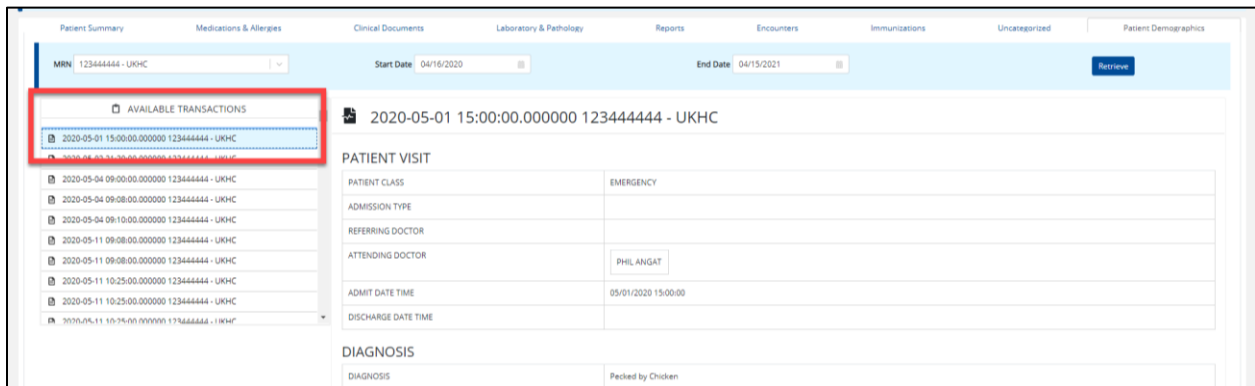
34. Select an **MRN** from the **MRN** drop-down menu.



35. Click **Retrieve** to generate the list of *Available Transactions*.



36. To review the demographic data, select a **Transaction** from the *list of Available Transactions*.



9 Bookmarking a Patient

Bookmarked Patients is a list of patients users have elected to favorite or bookmark to enable quick and easy access in the future. Bookmarks allow you to easily navigate to a specific patient chart you may need to review on a frequent basis.

Reviewing Bookmarked Patients

Users can access Bookmarked Patients from the *Navigation Bar* or from myDASHBOARD.

1. From myDASHBOARD, you will see up to five of your bookmarked patients; you can click **View All Bookmarked Patients** to see the entire list of patients you've bookmarked. Bookmarked Patients are listed in chronological order not in alphabetical order.

The screenshot shows the ePartnerViewer myDASHBOARD interface. The navigation bar at the top includes 'Patient Search', 'Bookmarked Patients' (highlighted with a red box), 'Event Notifications', 'Lab Data Entry', 'Secure Messaging', and 'Support'. The main dashboard area is titled 'myDASHBOARD' and contains three panels: 'Quick Search', 'Bookmarked Patients', and 'Event Notifications (Past 72 Hours)'. The 'Bookmarked Patients' panel displays a list of two patients: 'BRADY, BOBBY' and 'RADPAT, DEMOONE'. A red box highlights the '> VIEW ALL BOOKMARKED PATIENTS' link at the bottom of this panel. The 'Event Notifications' panel shows 'There is no data to be displayed'.


Please Note: From within the patient chart, Users can click Bookmarked Patients in the *Navigation Ribbon* to view the list of **Bookmarked Patients**.

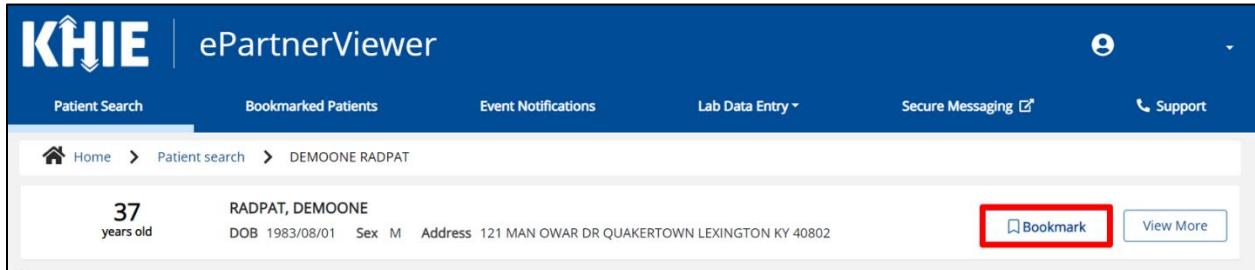
2. Click the **Patient Name** hyperlink to open the patient's chart.

The screenshot shows the 'BOOKMARKED PATIENTS' patient list. The list displays two patients: 'BRADY, BOBBY' and 'RADPAT, DEMOONE'. The name 'RADPAT, DEMOONE' is highlighted with a red box. The interface includes pagination controls (First, Back, 1, Next, Last) and a 'Maximum 5 entries per page' setting.

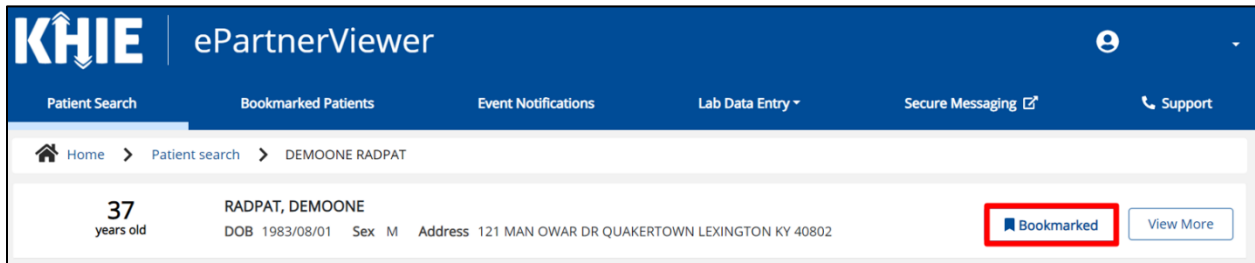
PATIENT NAME	DATE OF BIRTH
BRADY, BOBBY	07/12/1970
RADPAT, DEMOONE	08/01/1983

Adding Bookmarks


1. To bookmark a patient, you must be in the patient chart to select the **Bookmark Icon**  located within the patient header.

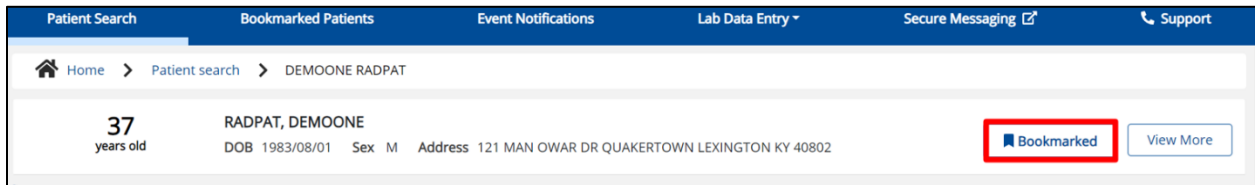


2. The **Bookmark Icon** changes from *light to dark* and displays the text *Bookmarked* to indicate the patient has been added to **Bookmarked Patients**.

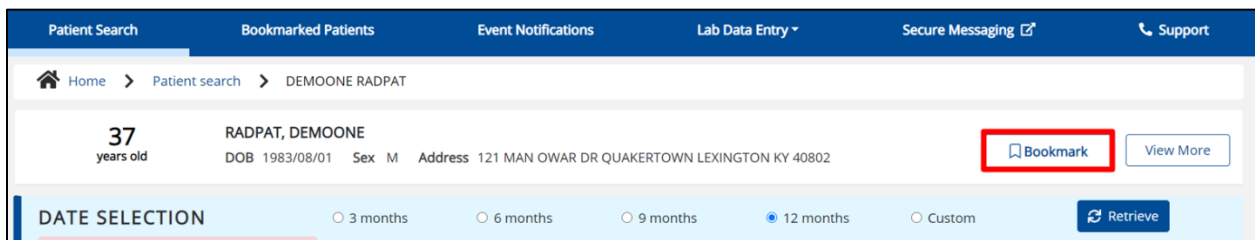


Removing Bookmarks

1. To remove a bookmark, you must be in the patient chart to click the **Bookmark Icon**  located within the patient header.



2. The **Bookmark Icon** changes from *dark to light* and displays the text *Bookmark* to indicate the patient is no longer in **Bookmarked Patients**.



10 Viewing and Exporting Radiology Images

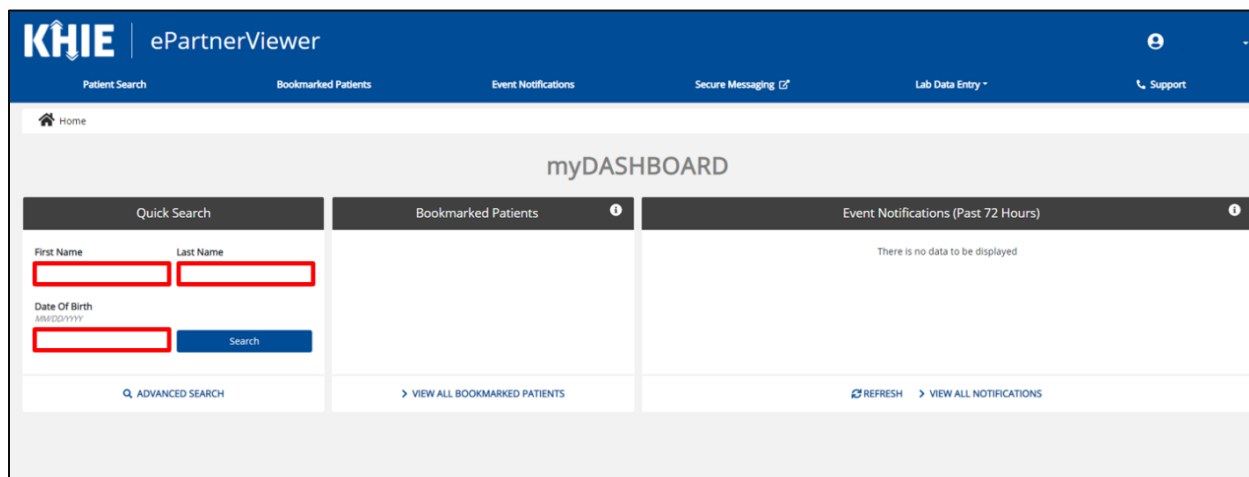
Users with one of the *Clinical User* roles are authorized to view low resolution images in the ePartnerViewer. Users with a *Clinical User* role and the *PACS Administrator* role can export images to their local Picture Archiving and Communications Systems (PACS) to view in high resolution.

Please Note: Users with a *Clinical User* role can view images but **cannot** export images without also having the *PACS Administrator* role. Images in the ePartnerViewer are not in high resolution and are not intended for diagnostic purposes.

Viewing Images in the ePartnerViewer

Users with a *Clinical User* Role are authorized to search for patients and view low resolution images within the ePartnerViewer.

1. From myDASHBOARD, search for a patient by entering the patient's **First Name**, **Last Name**, and **Date of Birth**.



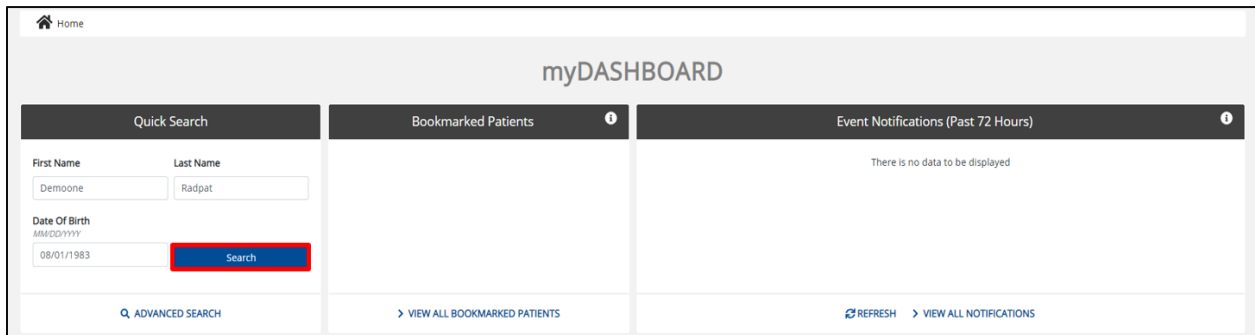
The screenshot shows the ePartnerViewer myDASHBOARD search interface. The top navigation bar includes 'Patient Search', 'Bookmarked Patients', 'Event Notifications', 'Secure Messaging', 'Lab Data Entry', and 'Support'. The main content area is titled 'myDASHBOARD' and contains three panels: 'Quick Search', 'Bookmarked Patients', and 'Event Notifications (Past 72 Hours)'. The 'Quick Search' panel has input fields for 'First Name', 'Last Name', and 'Date Of Birth' (MM/DD/YYYY), along with a 'Search' button and an 'ADVANCED SEARCH' link. The 'Bookmarked Patients' panel has a 'VIEW ALL BOOKMARKED PATIENTS' link. The 'Event Notifications' panel displays 'There is no data to be displayed' and has a 'REFRESH' link and a 'VIEW ALL NOTIFICATIONS' link.

Please Note: Users should enter the patient's **Date of Birth** to narrow down the patient match results in the event there are multiple patients with the same first and last names.

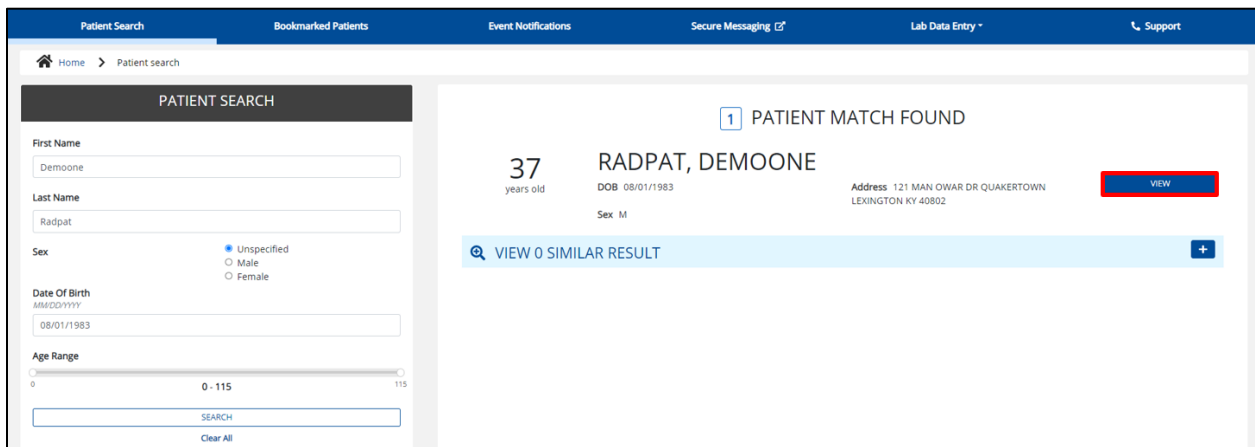
When the patient's Date of Birth is unknown, Users can click on **Advanced Search** to provide the patient's **Age Range**.

When the patient's Sex is known, Users can select the **Patient Sex**.

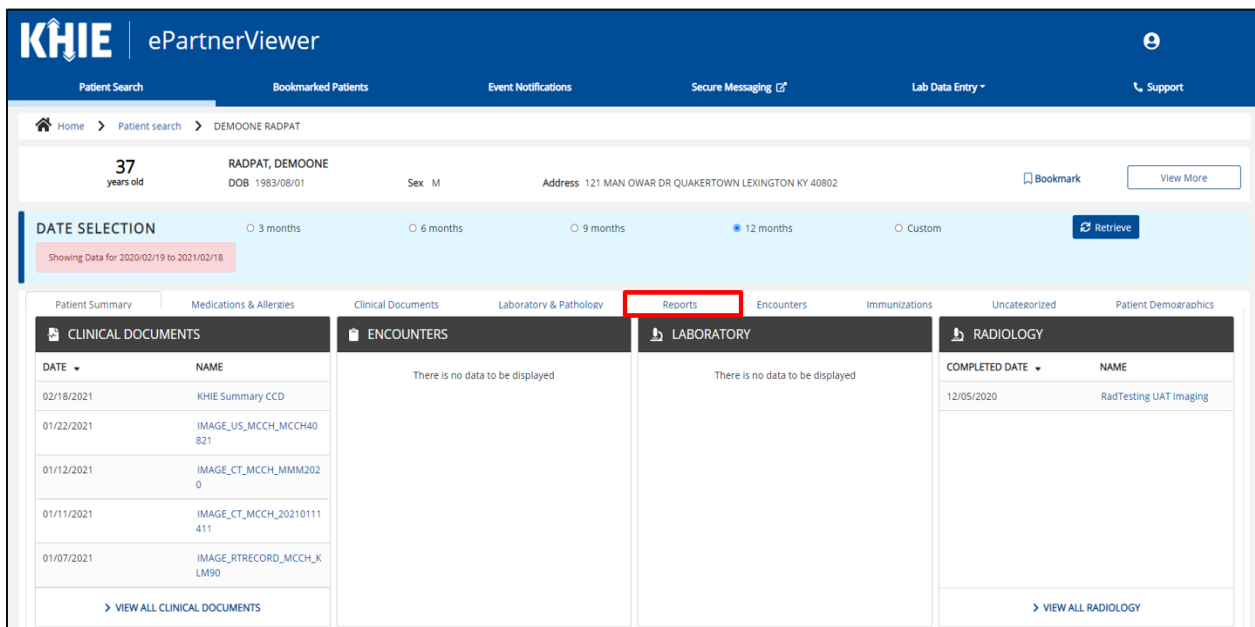
2. Click **Search**.



- 3. The Patient Search results display. Select the appropriate **Patient Match**.
- 4. Click **View** to open the patient chart. It will open in the Patient Summary.



5. To view images, click the **Reports** tab.



6. Click the **Images** tab.

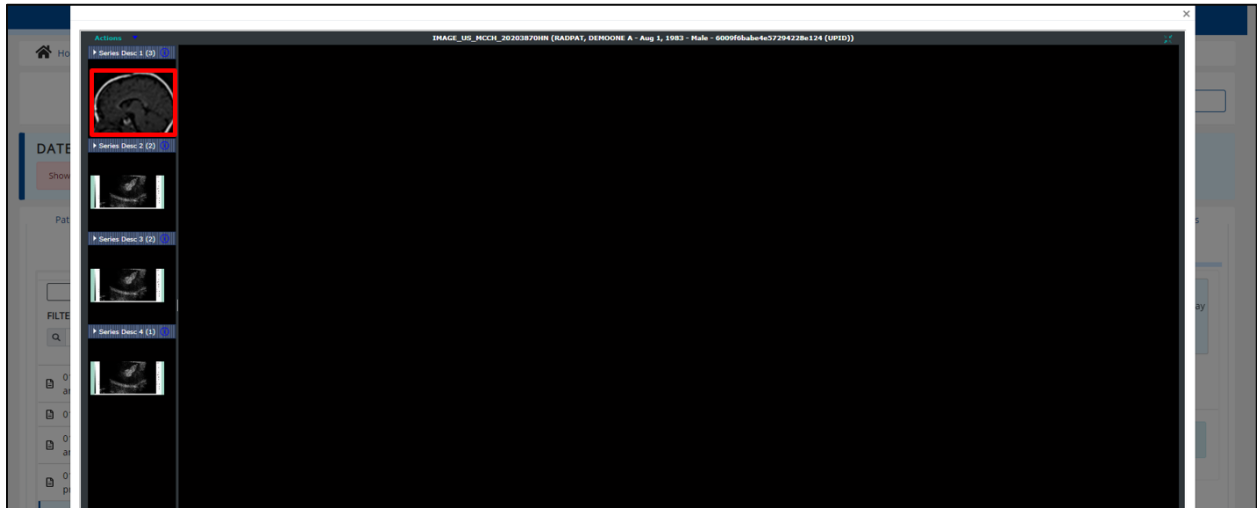
The screenshot shows the ePartnerViewer interface for patient DEMOONE RADPAT. The patient is 37 years old, born 1983/08/01, with address 121 MAN OWAR DR QUAKERTOWN LEXINGTON KY 40802. The 'DATE SELECTION' is set to 12 months. The 'IMAGES' tab is highlighted in a red box. The 'AVAILABLE DOCUMENTS' list shows one document: '12/05/2020 RadTesting UAT Imaging 6:39:38 am'. The 'RADIOLOGY REPORTS' section shows details for 'RADTESTING UAT IMAGING' performed on 2020/12/05.

7. To view an image preview, select the **desired image report** from the list of *Available Documents* located on the left side.

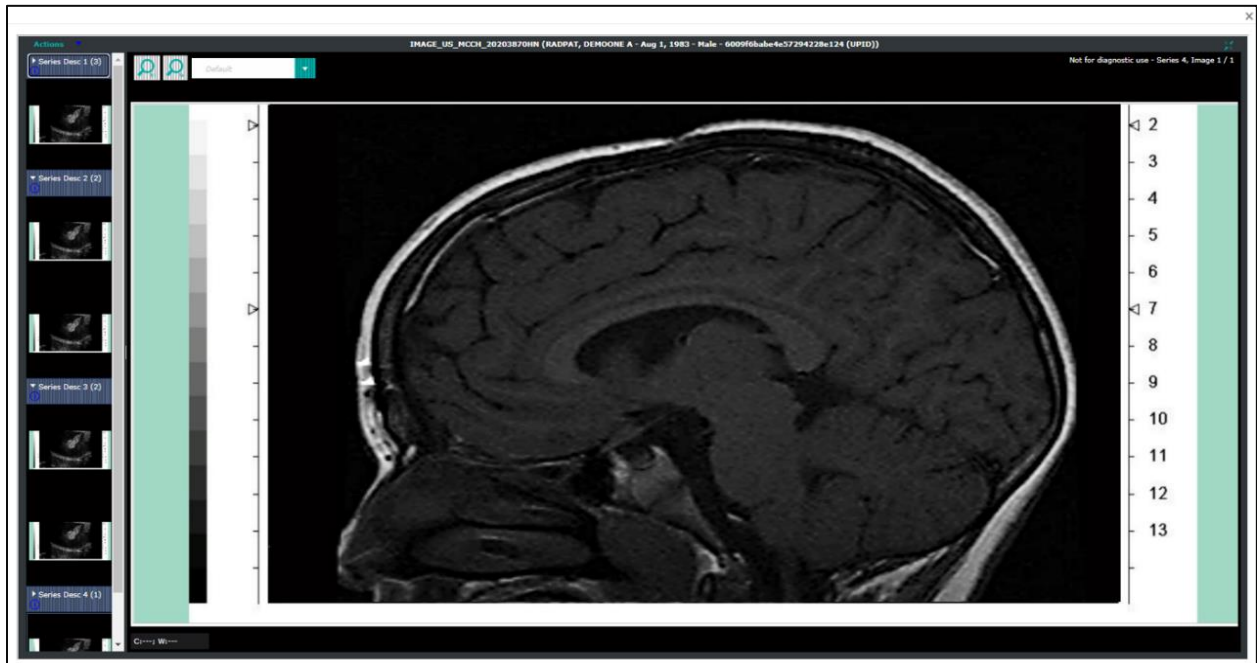
The screenshot shows the 'AVAILABLE DOCUMENTS' list in the ePartnerViewer interface. The list is highlighted in a red box and contains three items:

- 01/22/2021
IMAGE_US_MCCH_MCCH40821
12:03:18 am
- 01/12/2021
IMAGE_CT_MCCH_MMM2020
7:37:37 am
- 01/11/2021
IMAGE_CT_MCCH_20210111411
7:45:00 am

- The images display as thumbnail images. To view a larger version of an image, select the desired **thumbnail image**.



- A larger version of the image displays.

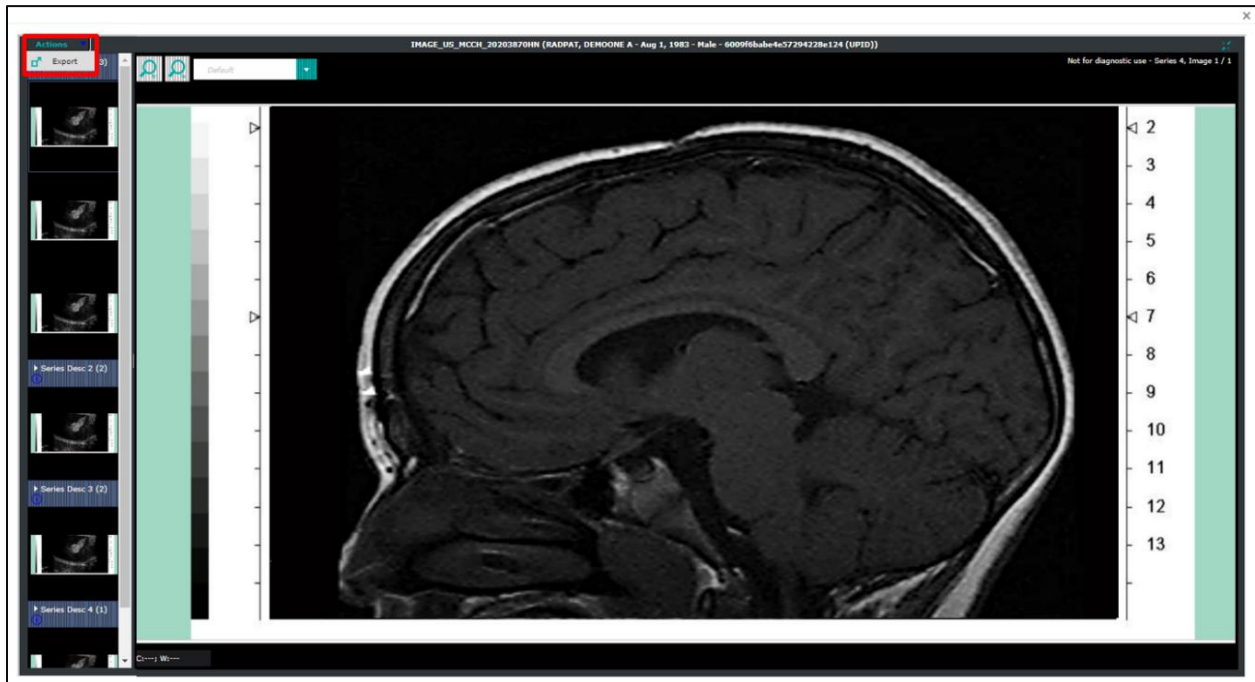


Please Note: The images viewed in the ePartnerViewer are low resolution images and are not intended for diagnostic purposes. To view high resolution images, Users with the *PACS Administrator* role must export images to their local Picture Archiving and Communications Systems (PACS). Users must have a *Clinical User* role and the *PACS Administrator* role to export images.

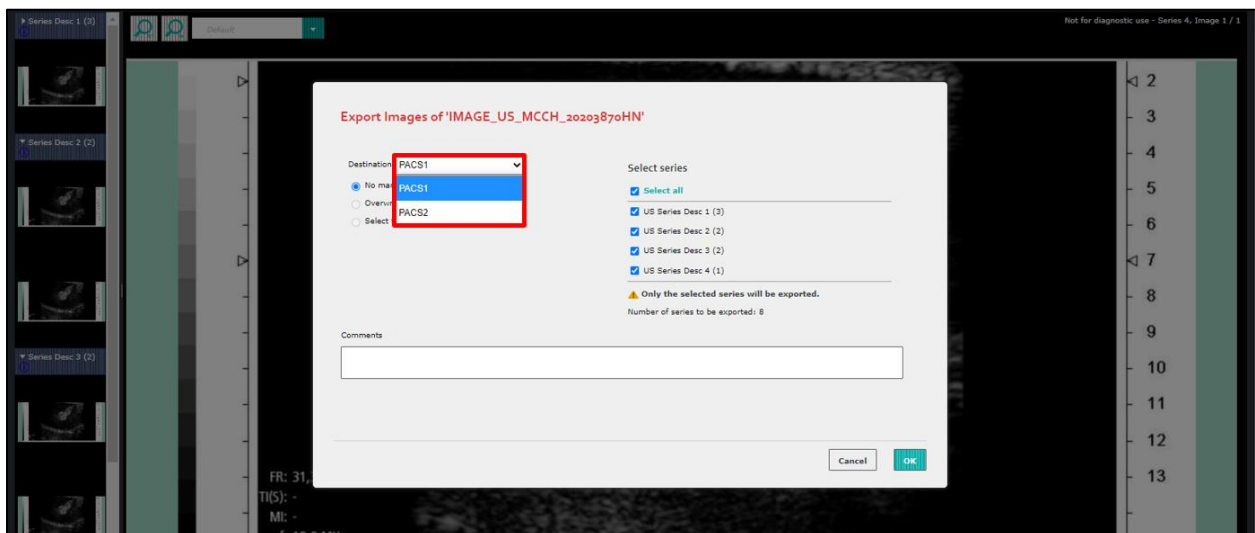
Exporting Images

To view high-resolution images, Users must export images to their local Picture Archiving and Communications Systems (PACS) using DICOM or XCA-i. Only authorized Clinical Users with the *PACS Administrator* role have the option to export the image to a local PACS system.

1. To export a desired image to your local PACS system, complete steps 1 through 9 above and 1 through 8 below.
2. Click **Actions**. Under the **Actions** drop-down, click **Export**.



3. A Pop-up Menu displays. Select the **appropriate target PACS system** from the *Destination* field drop-down.



4. Select the **appropriate series** for exporting the image.

Destination: PACS1

No manual modifications
 Overwrite values
 Select from worklist

Select series

- Select all
- US Series Desc 1 (3)
- US Series Desc 2 (2)
- US Series Desc 3 (2)
- US Series Desc 4 (1)

⚠ Only the selected series will be exported.
Number of series to be exported: 8

Comments

Cancel OK

Please Note: By default, all series are selected. Users must de-select the **Select All** button, then select the appropriate series to export the image from a specific series.

5. If desired, enter **additional details** about the image in the *Comments* field.

6. Once complete, click **OK**.

Destination: PACS1

No manual modifications
 Overwrite values
 Select from worklist

Select series

- Select all
- US Series Desc 1 (3)
- US Series Desc 2 (2)
- US Series Desc 3 (2)
- US Series Desc 4 (1)

⚠ Only the selected series will be exported.
Number of series to be exported: 5

Comments

Test

⚠ Please don't use sensitive information in your comment.

Cancel OK

7. The **Exports** screen displays the status and details of the image export. The green checkmark indicates that the image was successfully exported.

Date	Patient ID	Target	Priority	State	Total	Comments
Feb 18, 2021, 2:10:18 PM	6009f6babe4e57294228e124 (URID)	PACS1		✓	8	
Feb 18, 2021, 11:53:36 AM	6009f6babe4e57294228e124 (URID)	PACS1		✓	5	Test

8. Click the **Green Checkmark** to view additional details of the image export.

Date	Patient ID	Target	Priority	State	Total	Comments
Feb 18, 2021, 2:10:18 PM	6009f6babe4e57294228e124 (URID)	PACS1		✓	8	
Feb 18, 2021, 11:53:36 AM	6009f6babe4e57294228e124 (URID)	PACS1		✓	5	Test

Export Details

Stored 5

Found 0

Failed 0

Failure

11 Reviewing and Managing Event Notifications

The Event Notifications feature enables healthcare providers to track high priority patients and informs providers of specific healthcare events which have occurred with specific patients in their care. Event Notifications are intended to improve care coordination as patients transition from various healthcare settings. For example, an event notification may be generated to inform a healthcare provider that a patient from his panel has been admitted to a hospital.

Reviewing Event Notifications

myDASHBOARD offers a quick view of the most recent event notifications that have occurred with high priority patients.

1. To view Event Notifications, click **View All Event Notifications** from *myDASHBOARD* or click on the **Event Notifications** tab in the *Navigation Bar*.

The screenshot shows the ePartnerViewer interface. The navigation bar includes 'Patient Search', 'Bookmarked Patients', 'Event Notifications' (highlighted with a red box), 'Lab Data Entry', 'Secure Messaging', and 'Support'. The main content area is titled 'myDASHBOARD' and contains three panels: 'Quick Search' with input fields for First Name, Last Name, and Date of Birth; 'Bookmarked Patients' with a 'VIEW ALL BOOKMARKED PATIENTS' link; and 'Event Notifications (Past 72 Hours)' which displays 'There is no data to be displayed' and a 'VIEW ALL NOTIFICATIONS' link (highlighted with a red box).

2. Click **Recent Notifications** to review a list of recent event notifications.

The screenshot shows the NOTIFICATIONS page. The 'RECENT NOTIFICATIONS' tab is highlighted with a red box. The table below lists recent notifications:

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:48 am	Specialty Visit	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	09/10/2020 12:03:08 pm	08/07/2020 2:07:56 pm	Results Ready for Review	TESTWS	HOUSE,COUNTRY	20 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:55 pm	Possible Positive Test Result for COVID-19	TESTWS	ANOTHER,ILLHAVE	21 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:54 pm	Results Ready for Review	TESTWS	ANOTHER,ILLHAVE	21 years

Navigation: First | Back | 1 | 2 | 3 | Next | Last. Maximum 5 entries per page.

3. Click **Delete** to delete a notification.

The screenshot shows the 'Event Notifications' page with a table of recent notifications. The table has columns for ACTION, EVENT DATE, NOTIFICATION DATE, EVENT, FACILITY, NAME, and AGE. The first row has a red box around the 'Delete' button in the ACTION column.

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:48 am	Specialty Visit	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	09/10/2020 12:03:08 pm	08/07/2020 2:07:56 pm	Results Ready for Review	TESTWS	HOUSE,COUNTRY	20 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:55 pm	Possible Positive Test Result for COVID-19	TESTWS	ANOTHER,ILLHAVE	21 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:54 pm	Results Ready for Review	TESTWS	ANOTHER,ILLHAVE	21 years

4. Click **Deleted Notifications** to review all deleted notifications.

The screenshot shows the 'Event Notifications' page with the 'Deleted Notifications' tab selected and highlighted with a red box. The table below shows deleted notifications with columns for EVENT DATE, NOTIFICATION DATE, EVENT, FACILITY, NAME, and AGE.

EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
04/01/2020 4:30:15 pm	04/01/2020 8:33:46 pm	Results Ready for Review	MCCH	ASHLAND,BILL E	43 years
03/31/2020 1:32:00 am	04/01/2020 6:18:52 pm	Hospital Admission	UKHC	ASHLAND,BILL E	43 years
01/22/2020 4:34:03 pm	04/01/2020 6:18:46 pm	Emergency Department Admission	MCCH	ASHLAND,BILL E	43 years
03/31/2020 1:32:00 am	04/01/2020 6:18:46 pm	Behavioral Health Admission	UKHC	ASHLAND,BILL E	43 years

Managing Event Notifications

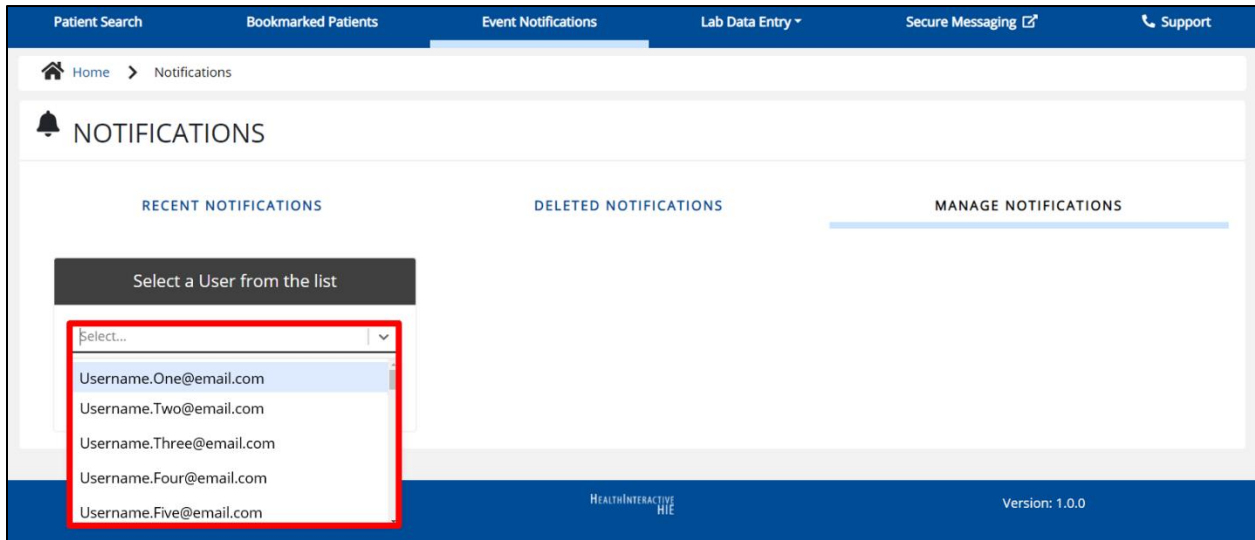
Users with a *Clinical* role can manage their own event notifications. They can add and delete patients and edit the types of event notifications they want to receive on their patients.

Users with the *Event Notification Administrator* role can manage event notifications for other Users in their organization.

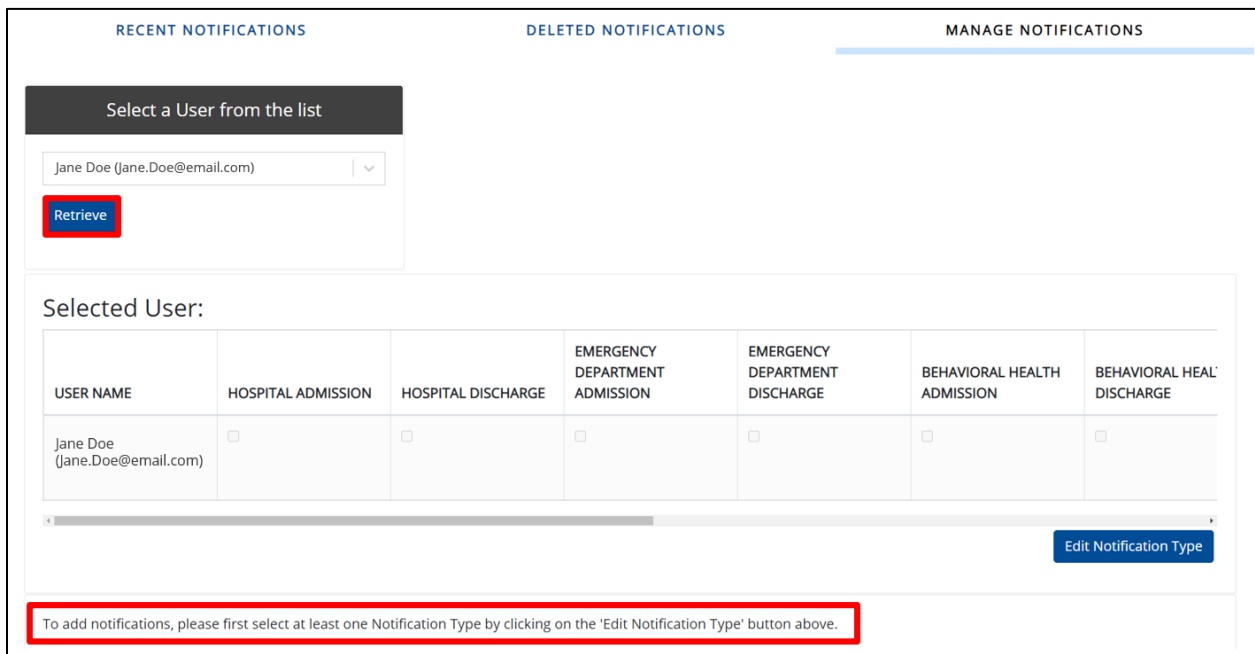
1. Click **Manage Notifications** to add and delete patients and edit the types of event notifications received.

The screenshot shows the 'Event Notifications' page with the 'Manage Notifications' tab selected and highlighted with a red box. Below the tab, there is a form with a dropdown menu labeled 'Select a User from the list' and a 'Retrieve' button.

- To manage notifications for a User, select the **Name of the User** from the *Select a User from the List* drop-down.



- Click **Retrieve** to display the *Selected User* and *Selected Patients*.



Please Note: If the User has not yet added any event notifications, only the *Selected User* section displays. Once the User clicks **Edit Notification Type** and adds at least one Notification Type, the **Add Patient** button is enabled and displays. Once the User adds patients, the *Selected Patients* section displays data.

The *Selected User* section displays the event notification types that are enabled for a selected user. You can add or delete the notifications that a Selected User receives.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEAL DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Edit Notification Type](#)

4. Click **Edit Notification Type** to activate the checkboxes.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEAL DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Edit Notification Type](#)

5. Click the **Checkboxes** to add or delete a notification.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEAL DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Notification Type](#) [Cancel](#)

6. To save the changes, click **Save Notification Type**.

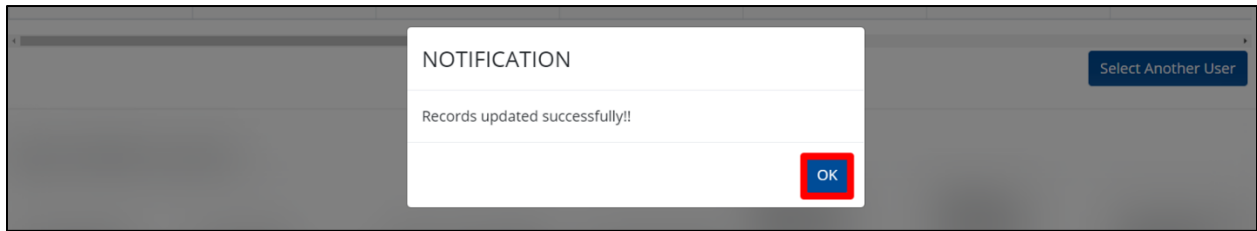
7. To discard the changes, click **Cancel**.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEAL DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Notification Type](#) [Cancel](#)

- After saving the Notification Type, a **Pop-up** displays indicating the record has been successfully updated. Click **OK** to close the pop-up.



The *Selected Patients* displays the list of patients and the event notification types for each patient the user is monitoring. Users can add patients to the patient panel and manage the types of notifications received for each patient.

Selected Patients:
Showing 5 ITEMS

PATIENT NAME	USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE	HOSPITAL READMISSION (OTHER FACILITY)	SPECIALTY VISIT	RESULTS READY FOR REVIEW	TOXICOLOGY SCREEN
BILL ASHLAND	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COUNTRY HOUSE	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BIG BROWN	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ILHAVE ANOTHER	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BOBBY BRADY	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

First Back 1 Next Last Maximum 5 entries per page
Add Patient Edit Notification

- To add patients to the panel, click **Add Patient** to open the *Patient Search*.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Edit Notification Type

There is no data to be displayed

Add Patient

Please Note: If the User has not yet added any patients to receive event notifications, the *Selected Patients* section will not display. Once the User adds patients, the *Selected Patients* section is enabled and displays data.

- The *Patient Search* displays. Enter the patient's **First Name** and **Last Name**.
- Enter the patient's **Date of Birth**.

12. When the Date of Birth is unknown, provide the patient's **Age Range**.
13. Enter the patient's **Sex**.
14. Click **Search**. The Patient Search Results display to the right.

[Select Another User](#)

PATIENT SEARCH

First Name

Last Name

Sex
 Unspecified
 Male
 Female

Date Of Birth
MM/DD/YYYY

Age Range
 0 - 115 115

[Clear All](#)

No Searches Completed

15. Click the **Checkbox** next to the patient for whom you want to receive event notifications.

PATIENT SEARCH

First Name

Last Name

Sex
 Unspecified
 Male
 Female

Date Of Birth
MM/DD/YYYY

Age Range
 0 - 115 115

[Clear All](#)

3 PATIENT MATCHES FOUND

SHOWING 3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

1

Maximum entries per page

16. Click **Show Selected Patient** to display the patient's name.

PATIENT SEARCH

First Name

Last Name

Sex

Unspecified
 Male
 Female

Date Of Birth
MM/DD/YYYY

Age Range

0 115

3 PATIENT MATCHES FOUND

SHOWING 3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

Maximum entries per page

Show Selected Patient

Please Note: To add multiple patients at the same time, do **not** click on **Add Notifications** until the final patient has been selected.

Users should continue using the search functionality to search for and add patients to the list. Click **Add Notifications** once the last patient has been added.

17. Click **Add Notifications** to select the notifications.

PATIENT SEARCH

First Name

Last Name

Sex

Unspecified
 Male
 Female

Date Of Birth
MM/DD/YYYY

Age Range

0 115

3 PATIENT MATCHES FOUND

SHOWING 3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

Maximum entries per page

Selected Patients:

NAME	DATE OF BIRTH	GENDER	ADDRESS
BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137

Maximum entries per page

Add Notification

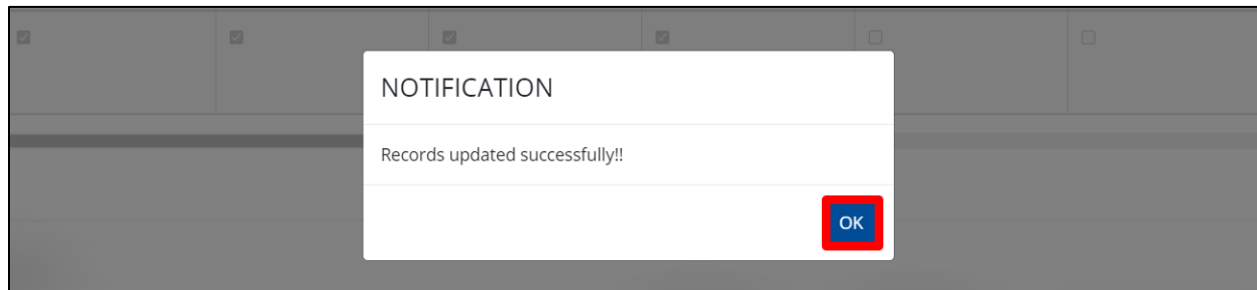
- Click the appropriate **Checkboxes** to select the notifications you would like to receive on the selected patient(s).
- Click **Save Notifications** to save the changes.

Select Notifications:

PATIENT NAME	USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
BOBBY BRADY	Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Notifications](#)

- The **Notification Pop-up** displays. Click **OK** to close the pop-up.



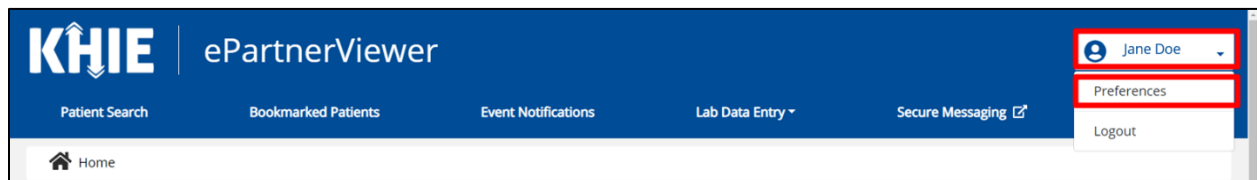
Please Note: For additional information on Setting up and Managing Event Notifications in the ePartnerViewer, refer to the *Resources* section in the ePartnerViewer.

12 Managing User Preferences

Users can customize their view of patient data in a format that is functional for them. Customization includes setting a preference for the number and arrangement of Portlets displayed; setting a preference for date, time, and number format; and setting the default preference for how much data is retrieved upon initial patient search. Once set, these preferences will remain in effect for every patient chart viewed until the user changes them again.

Apply Customized Preferences

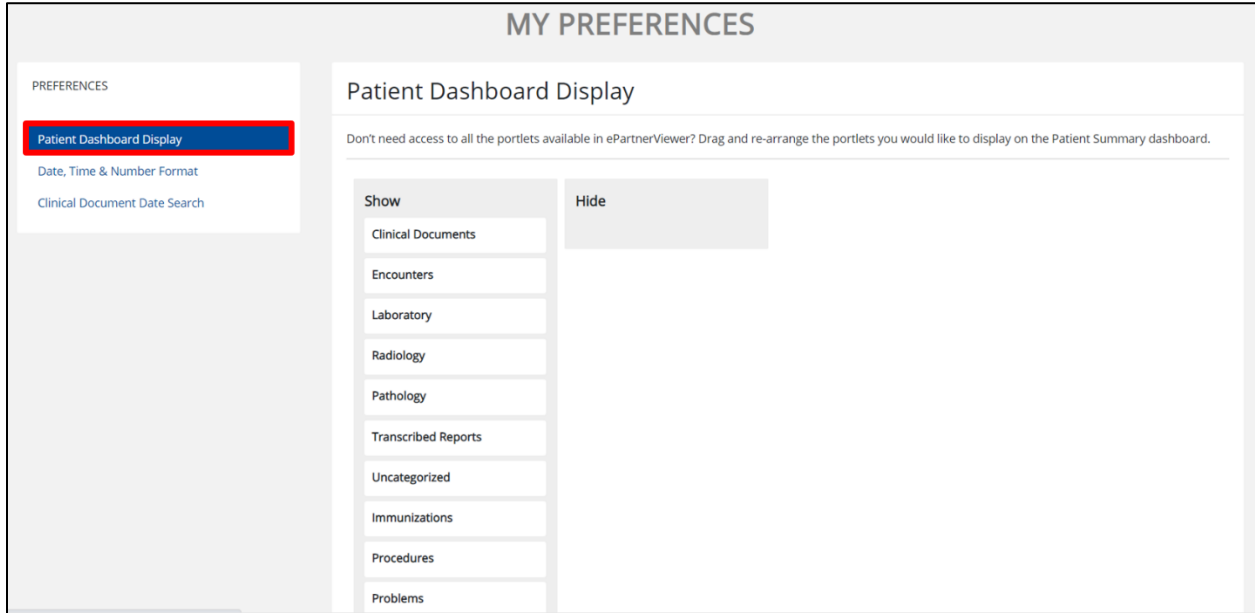
- To navigate to the **Preferences** page, click your **username** displayed in the top right corner.
- Select **Preferences** from the drop-down menu.



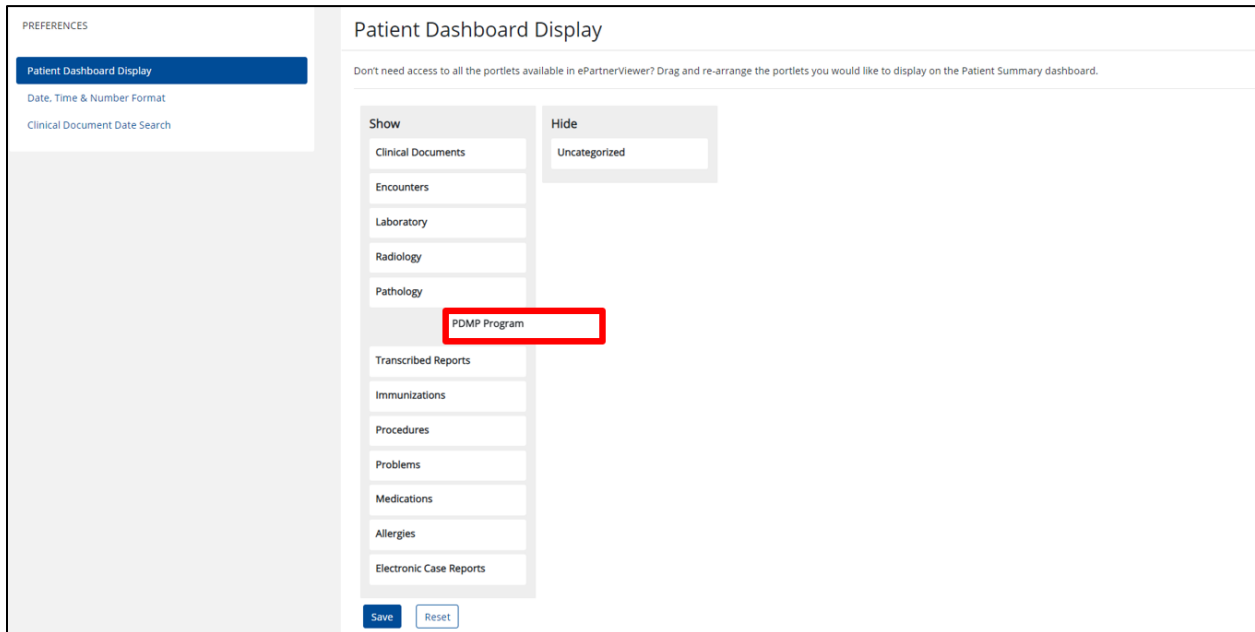
Patient Dashboard Display

Enables you to customize the appearance of the *Patient Summary* dashboard by selecting the Portlets you want to see and arranging them in an order that is functional for you.

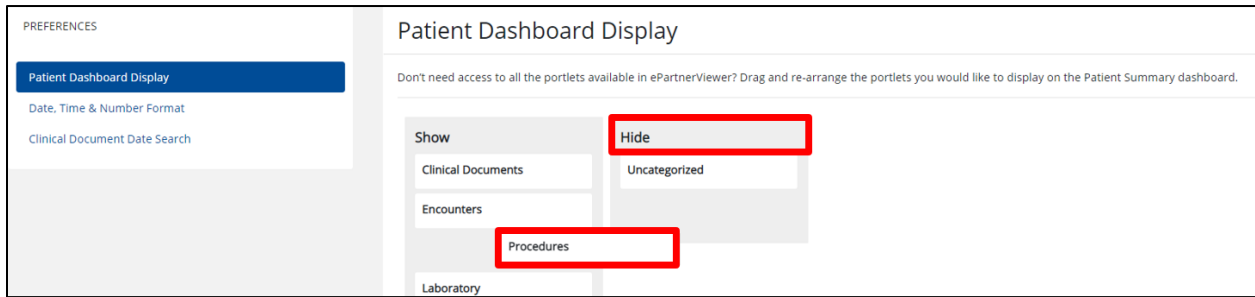
3. On the **Preferences** page, click **Patient Dashboard Display**.



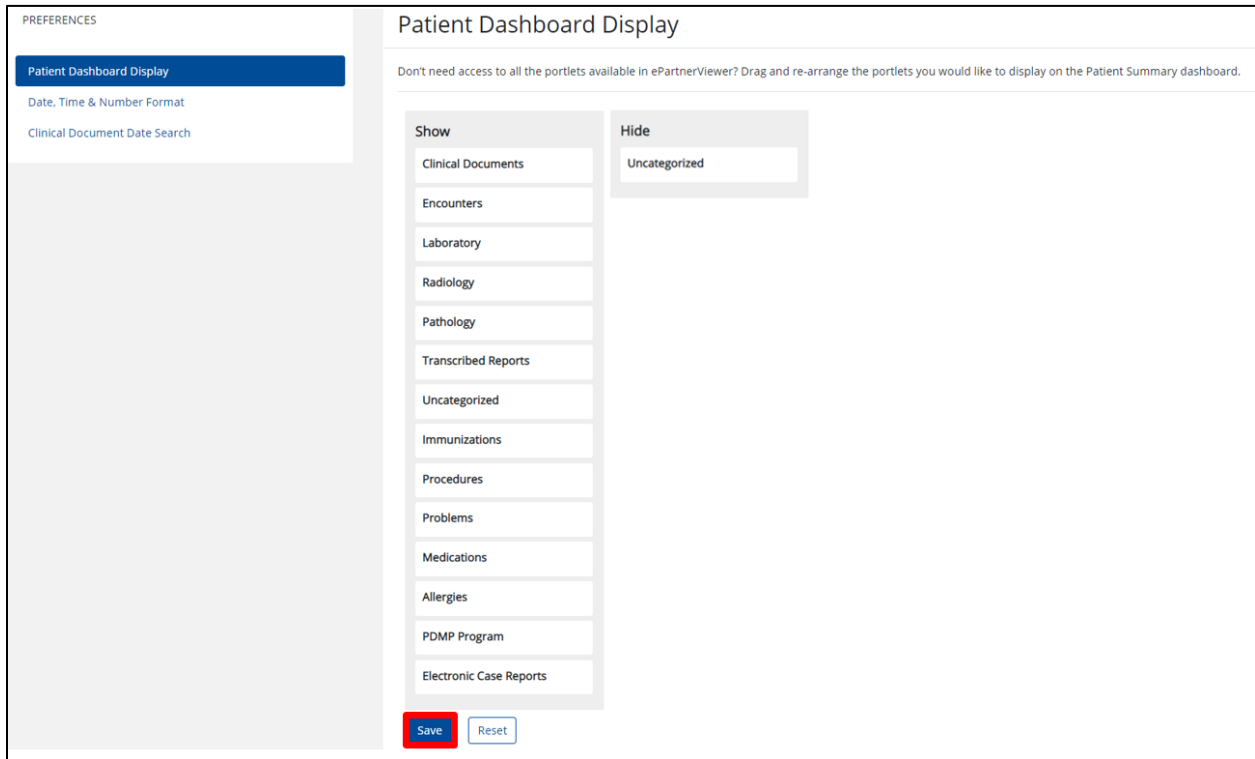
4. To customize the order in which the Portlets appear, drag the Portlets up and down to arrange them in the desired order.



- To hide Portlets so that they are not visible on the Patient Summary, drag the Portlets across to the *Hide* column.



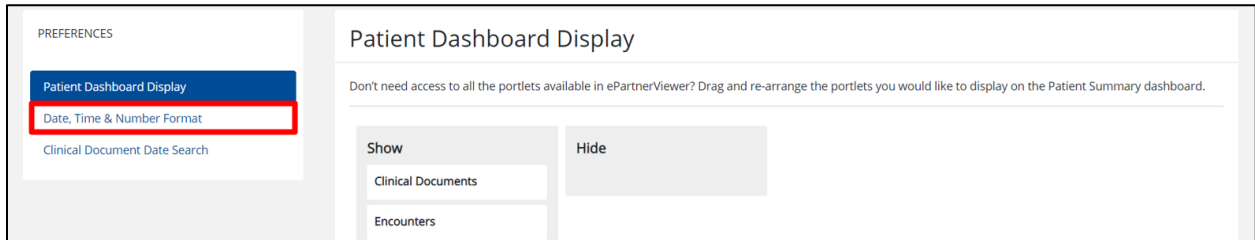
- Click **Save** to apply changes.



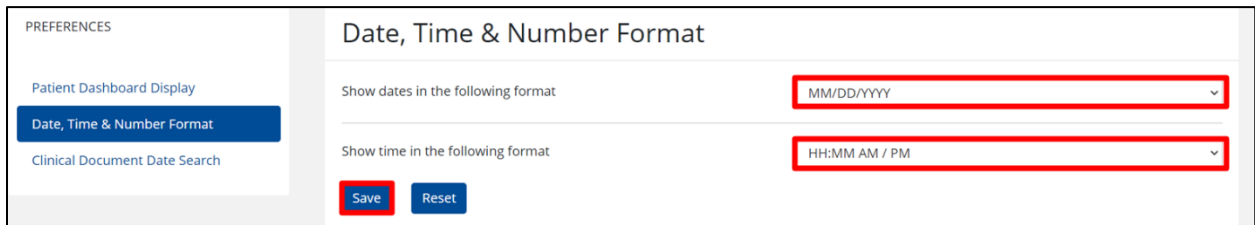
Date, Time, and Number Format

Enables users to choose a preferred date, time, and number format displayed throughout the ePartnerViewer. Note that changes are not applied to information contained *within* clinical reports (e.g., radiology report date listed in text will **not** be altered).

1. On the **Preferences** page, click **Date, Time, & Number Format**.



2. Select the **preferred date format** and the **preferred time format** from the drop-downs.
3. Click **Save** to apply changes.

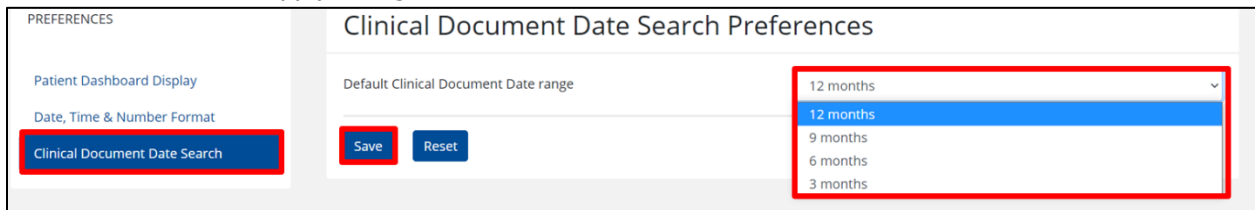


Clinical Document Date Search

Enables users to choose a default setting for how much patient data is retrieved upon the initial patient search. The standard default is to retrieve the last twelve (12) months of data.

The Date Selection feature allows you to control how much data you retrieve for a patient.

1. On the **Preferences** page, click **Clinical Document Date Search**.
2. You can select either of the following settings as your default:
 - Select **3 months** to see the latest 3 months of patient data.
 - Select **6 months** to see the latest 6 months of patient data.
 - Select **9 months** to see the latest 9 months of patient data.
 - Select **12 months** to see the latest 12 months of patient data.
3. Click **Save** to apply changes.



13 Logging Out of the ePartnerViewer

Users must log out to maintain security and minimize the risk of a potential HIPAA violation.

1. To exit the ePartnerViewer, click your **username** displayed in the top right corner.
2. Select **Logout** from the drop-down menu.



14 Technical Support

Support Tab in the Navigation Bar

To contact us for support with the ePartnerViewer, click the Support Tab located in the *Navigation Bar* in the ePartnerViewer.

Toll-Free Telephone Support

For questions and assistance regarding the ePartnerViewer, please call 1 (877) 651-2505.

Email Support

To submit questions electronically or request support regarding the ePartnerViewer, please email KHIESupport@ky.gov.