

Kentucky Health Information Exchange (KHIE)

Event Notifications: Patient Panel Bulk Uploads in the ePartnerViewer

User Guide

April 2023



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Document Control Information

Document Information

| Document Name | Event Notifications Patient Panel Bulk Uploads in the ePartnerViewer User Guide |
|------------------|---|
| Project Name | KHIE |
| Client | Kentucky Cabinet for Health and Family Services |
| Document Author | Deloitte Consulting |
| Document Version | 1.0 |
| Document Status | FINAL |
| Date Released | 04/06/2023 |

Document Edit History

| Version | Date | Additions/Modifications | Prepared/Revised by |
|---------|------------|-------------------------------|--------------------------|
| 0.1 | 03/28/2023 | Initial Draft | KHIE/Deloitte Consulting |
| 1.0 | 04/05/2023 | Revised Draft per KHIE Review | KHIE/Deloitte Consulting |
| 1.0 | 04/06/2023 | FINAL | KHIE |
| | 07/31/2024 | Updated KHIE Phone Number | Charlese Blair KHIE |



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1 Introduction

Overview

As part of KHIE's ongoing updates and maintenance in the ePartnerViewer portal, additional features have been added to the Event Notifications functionality. The Event Notification Patient Panel Upload file template has been enhanced to only include the fields required for the ePartnerViewer to execute the bulk upload. Now, when uploading the Event Notification Patient Panel file, authorized users with the *Event Notification Administrator* (hereafter referred to as 'Administrator') role can easily select event notifications for newly added patients on a bulk upload file. Administrators can also delete existing patients from a user's patient panel in the ePartnerViewer.

The purpose of this guide is to provide an overview of these changes and provide step-by-step instructions and screenshots showcasing the new features in the ePartnerViewer.

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.

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.
- 3. Users are required to complete Multi-Factor Authentication (MFA).

Please Note: For specific information about creating a KOG account and how to complete MFA, please review the *ePartnerViewer Login: Kentucky Online Gateway (KOG) and Okta Verify Multi-Factor Authentication (MFA) Quick Reference Guide* on the <u>KHIE website</u>.



2 Event Notification Overview

The Event Notifications feature enables healthcare providers to track high priority patients and informs providers of specific healthcare events that have occurred with specific patients in their care for the purposes of treatment, quality improvement, and care coordination activities.

Event Notifications are intended to keep healthcare providers "in the know" and improve care coordination as patients transition from various healthcare settings. The use of Event Notifications to inform healthcare providers when a patient is admitted to or discharged from an Emergency Department, for example, supports care coordination activities across disparate providers.

Event Notification Types

The table below defines the 13 Event Notification types that are triggered to inform healthcare providers when specific healthcare events occur with high priority patients in their care:

| Event Notification Type | Event Notification Criteria Description |
|--|---|
| Hospital Admission | When a patient is admitted to a hospital. |
| Hospital Discharge | When a patient is discharged from a hospital. |
| Emergency Department Admission | When a patient is admitted to an Emergency Department. |
| Emergency Department Discharge | When a patient is discharged from an Emergency Department. |
| Behavioral Health Admission | When a patient is admitted to a behavioral health facility. |
| Behavioral Health Discharge | When a patient is discharged from a behavioral health facility. |
| Hospital Readmission (Other Facility) | When a patient is admitted to another hospital/facility within 30 days of the last admission to a hospital/facility. |
| Specialty Visit | When a patient is registered at or discharged from a specialty healthcare practice. |
| Results Ready for Review | When the final or corrected result report is available for a patient. |
| Toxicology Screen | When a patient is admitted to or discharged from an Emergency Department or hospital with a diagnosis code associated with an overdose. |

Event Notifications Patient Panel Bulk Uploads User Guide_2023-04-04_v1.0



| Overutilization | When a patient is admitted to an Emergency Department four times in a rolling 365-day period. |
|---|--|
| Possible Positive Test Result for COVID-19 | When a patient's test result is positive for COVID-19. |
| Abnormal A1c | When a patient's glucose, or blood sugar, level is outside the normal range. This test measures blood sugar levels over the past 3 months to diagnose type 2 diabetes and prediabetes. |

3 Event Notification Patient Panel Bulk Upload

Patient Panel Bulk Upload Overview

The Event Notification Patient Panel Bulk Upload functionality is designed to reduce the burden on healthcare professionals with a *Clinical User* role in the ePartnerViewer who have large patient volume. *Clinical Users* do **not** have the ability to upload a bulk list of patients to receive event notifications.

Users with the *Event Notification Administrator (Administrator)* role can work on behalf of healthcare professionals within their organization by uploading a bulk list of patients to receive event notifications. *Only Administrators* can use the Patient Panel Bulk Upload feature to upload Patient Panels for different users within the same organization. *Administrators* can assign patients to *Clinical Users* and select which event notifications will be received for each patient. Additionally, the new **Delete Patient** button on the **Upload Patients** screen allows *Administrators* to delete existing patient(s) from a *Clinical User's* patient panel in the ePartnerViewer if the *Clinical User* no longer wants to receive event notifications for the listed patient(s).

The **Event Notification Patient Panel Upload file** is a downloadable template on the **Upload Patients** screen which is intended to assist *Administrators* with uploading a bulk list of patients for *Clinical Users* in their organization.

| AutoSave 💽 🖞 - 🤍 冬 - Event Notific | ation Patient Panel Upload (2).csv | ► $$>$ Sea | rrch (Alt+Q) | | , The second se | 0 | | · - | a x |
|---|------------------------------------|--------------------|---------------------------------------|----------------------|--|---------------------|--|-----------------|---------|
| File Home Insert Draw Page Layout Formulas Data | Review View Help | Acrobat | | | | | | Comments | 음 Share |
| V Format Painter | 🛅 🛅 Merge & Center 👻 | U | | Bad Calculation | Good Check Cell | Format v Clear v | ZV Sort & Find & Filter ~ Select ~ | Analyze Data | |
| Clipboard IS Font IS | Alignment | Sensitivity Number | ايرًا ا | Styles | Cells | | Editing | Analysis | |
| 136 ▼ : × ✓ fx | | | | | | | | | |
| Confidential \ No Additional Protection 🖌 | | | Confidential High Risk Confidential | Personal Information | 1 * | | | | |
| ΑΑ | В | С | D | E | F | G | н | I | |
| 1 Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zi | pcode |
| 2 khie_SIT_TEST_01@mailinator.com | Dectein | Julidec | 8/10/1959 | F | 1201 Man O'War Drive | LEXINGTON | KY | 40325 | |
| 3 khie_SIT_TEST_01@mailinator.com | Jason | Zaiden | 8/2/2008 | F | 1364 MAN OWAR BVLD | Seneca | KY | 40812 | |
| 4 khie_SIT_TEST_01@mailinator.com | Jane | Danyal | 6/21/1985 | M | PO Box 131 | Danville | KY | 40484 | |
| | Jackson | Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA | KY | 41230 | |
| 6 khie_SIT_TEST_01@mailinator.com | Kraus | Oblix | 9/17/2012 | M | 254 WALLER BRANCH RD | LOUISA | KY | 41230 | |
| 7 khie_SIT_TEST_01@mailinator.com | Kirby | Janis | 2/14/1920 | F | 1364 MAN OWAR BVLD | Lexington | KY | 40812 | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| | | | | | | | | | |
| 12 | | | | | | | | | |

Event Notifications Patient Panel Bulk Uploads in the ePartnerViewer



Required Fields on the Event Notification Patient Panel Upload File

The downloadable **Event Notification Patient Panel Upload** file template includes **only** the fields **required** for the ePartnerViewer to execute the bulk upload. *Administrators* must complete the following **required** fields on the Notification Patient Panel Upload file:

- Email address used to access ePartnerViewer
- Patient Last Name
- Patient First Name
- Patient DOB (MM/DD/YYYY)
- Patient Sex

- Patient Street Address
- Patient City
- Patient State
 - Patient Zipcode

| AutoSave 💽 🗒 🌱 🖓 - 🖓 - 😤 - 🗢 | Event Notification Patient Panel Upload (2).csv | У Sea | rch (Alt+Q) | | | 0 | | − | o X |
|--|--|-----------------------|---|----------------------|------------------------|--------------|---|-----------------|---------|
| File Home Insert Draw Page Lay | out Formulas Data Review View Help | Acrobat | | | | | | P Comments | 🖻 Share |
| Paste Ø Format Painter ↓ Calibri ↓ 1 Calibri ↓ 1 B I U ↓ I ↔ ↓ | I A ⁺ A ⁺ Ξ Ξ ※ ~ १२ Wrap Text Δ × Δ Ξ Ξ Ξ Ξ Ξ | Sensitivity S - % 9 | Conditional Format as Formating ~ Table ~ | Bad Calculation | Good | | um * Ar O Sort & Find & Filter * Select * | Analyze Data | |
| Clipboard fu Font | lignment | 15 Sensitivity Number | rs. | Styles | Cells | | Editing | Analysis | ^ |
| A29 * : × ✓ fx | | | | | | | | | ~ |
| Confidential \ No Additional Protection 🖌 | | Public | Confidential + High Risk Confidential + | Personal Information | * | | | | × |
| A | В | С | D | E | F | G | Н | 1 | - |
| 1 Email address used to access | ePartnerViewer Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zip | code |
| 2 | | | | | | | | | |

Bulk Upload Functionality Enhancements

The **Upload Patients** screen has been enhanced to enable *Administrators* to easily manage event notifications for the *Clinical Users* in their organization.

The new features and changes to the Event Notification Patient Panel Bulk Upload include:

1. On the **Upload Patients** screen, the *Upload File* section includes a **Help Icon** which provides guidance for downloading and uploading the Event Notification Patient Panel Upload file.

| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry * |
|--|-----------------------|---|---|
| Home > Notifications | | _ | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload File | 2 | Selec | t Notifications |
| Browse Maximum upload file size should not exceed SMB Acceptable File Format is .csv Add Patients Download Template Event Notification Patient Panel Upload.csv | O Delete Patients | 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 OTOXICOLOGY SCREEN OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C LUPload Cance |



 On the Upload Patients screen, the Upload File section includes the updated title for the hyperlink used to download the Event Notification Patient Panel Upload file. The title of the hyperlink has been changed from Clinical Notification Patient List Upload to Event Notification Patient Panel Upload.csv.

| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry • |
|--|-----------------------|---|---|
| Home > Notifications | | | |
| | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload File | | Select | Notifications |
| Browse Maximum upload file size should not exceed SMB Acceptable File Format is .csv | O Delete Patients | 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 OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C LUpload Cancel |
| UPLOADED FILES LIST | | | |

- 3. On the **Upload Patients** screen, the *Upload File* section includes the **Add Patients** radio button and the **Delete Patients** radio button.
 - The **Add Patients** radio button allows *Administrators* to easily add new patients to the assigned user's patient panel in the ePartnerViewer. The assigned user will start receiving event notifications for the patients listed on the uploaded Patient Panel file.
 - The **Delete Patients** radio button allows *Administrators* to delete existing patient(s) from the assigned user's patient panel in the ePartnerViewer. The assigned user will stop receiving event notifications for the patient(s) listed on the uploaded Patient Panel file.

| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry ~ |
|--|-----------------------|---|---|
| Home > Notifications | | - | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload | File | Select | Notifications |
| Browse Makimum upbad file size should not exceed SMB Acceptable File Format is .cs Add Patients Download Template Event Notification Patient Panel Upload.csv | O Delete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMENT ADMISSION EMERGENCY DEPARTMENT DISCHARGE BEHAVIORAL HEALTH ADMISSION EBHAVIORAL HEALTH DISCHARGE HOSPITAL READMISSION (OTHER FACILITY) | SPECIALTY VISIT CRESULTS READY FOR REVIEW OVERUTILIZATION OVERUTILIZATION OSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C Cancel |
| UPLOADED FILES LIST | | | |



4. The **Upload Patients** screen includes the *Select Notifications* section which allows *Administrators* to easily select event notifications when adding new patients to a *Clinical User's* patient panel in the ePartnerViewer.

| KHIE ePartnerViewer | | 🛛 Sup | port 📢 Announcements 🚺 🌲 Advisories 🚺 😔 SIT Test_1 * |
|--|-------------------------------------|---|--|
| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry + |
| Home > Notifications | | | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload | File | Select | t Notifications |
| Browse Assemum upblad file size should not exceed 5MB Acceptable File Format is .csv | Delete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMENT ADMISSION EMERGENCY DEPARTMENT DISCHARGE BEHAVIORAL HEALTH ADMISSION BEHAVIORAL HEALTH DISCHARGE HOSPITAL READMISSION (OTHER FACILITY) | SPECIALTY VISIT CRESULTS READY FOR REVIEW TOXICOLOGY SCREEN OVERUTILIZATION OVERUTILIZATION ABNORMAL A1C LUpload Cancel Cancel |
| | | | |

Please Note: To delete existing patient(s) from the assigned user's patient panel in the ePartnerViewer, *Administrators* must click **Delete Patients**, then click **Upload** in the *Select Notifications* section to upload the Event Notification Patient Panel Upload file.

Upon clicking **Delete Patients**, the *Select Notifications* section will be grayed out and the notification checkboxes will be disabled. The *Administrator* will <u>not</u> select any event notifications in this case because the assigned user no longer wants to receive any event notifications for the patient(s) listed on the Event Notification Patient Panel Upload file.

| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry • |
|--|-----------------------|---|--|
| Home > Notifications | | _ | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload F | ile | Selec | t Notifications |
| Browse Maximum upload file size should not exceed 5MB Acceptable File Format is .cv O Add Patients | Delete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMENT ADMISSION EMERGENCY DEPARTMENT DISCHARGE BEHAVIORAL HEALTH ADMISSION BEHAVIORAL HEALTH ADMISSION OTHER RACILITY) | SPECIALTY VISIT RESULTS READY FOR REVIEW TOXICOLOGY SCREEN VERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C |
| Download Template Event Notification Patient Panel Upload.csv | | | 🕹 Upload 🛛 Cancel |



Download the Event Notification Patient Panel Upload File

To download the Patient Panel file template, *Administrators* must complete the following steps:

1. Click the **Event Notifications Tab** located in the blue Navigation Bar at the top of the screen.

| Patient Search | | | | | | | | |
|--|--------|-------------------------------------|--|-----------------------------------|-------------------|------------------------------|-----------------|----------------------------------|
| | Bookma | irked Patients | Event No | otifications 2 | La | b Data Entry ~ | | Case Report Entry * |
| A Home | | | | | | | | |
| Advisory: !@#\$%^&*()_+~{} []\` | | | | | | | | Read More View |
| | | | | • | | | | |
| | | | myDAS | HBOARD | | | | |
| ICK SEARCH | | | | | | | | Q ADVANCED SEA |
| First Name | | Last Name | | Date Of Birth | n mm/dd/yyyy | | | C Search |
| | | | | | | | _ | |
| | 6 | | | EVENT NOTIFICAT | IONS (PAST 72 H | OURS) | | |
| BOOKMARKED PATIENTS | U | | | | | | | ORGANIZATION USER |
| | • | EVENT DATE | NOTIFICATION DATE | EVENT | FACILITY | NAME | AGE | ORGANIZATION USER |
| BOOKMARKED PATIENTS BRADY, BOBBY RADPAT, DEMOONE | 0 | EVENT DATE 12/27/2021 5:34:38 am | NOTIFICATION DATE 01/10/2022 7:26:27 pm | EVENT Results Ready for Review | FACILITY MERCY | NAME AMONETENV, TJANOVA K | AGE 24 years | Jane Doe (Jane.Doe@email.com) |
| BRADY, BOBBY | | | | | MERCY | | | Jane Doe |

2. Click the **Upload Patients Tab**.

| Hon | Patient Search | | Bookmarked Patients | Event Notif | | | Lab Data Entry + | | | | |
|-------|---|------------------------|--|-------------|-------------|----------|---|--|--|--|--|
| | OTIFICATIONS | | | | | | | | | | |
| OWING | RECENT NOTIFICATIONS DELETED NOTIFICATIONS MANAGE NOTIFICATIONS UPLOAD PATIENTS | | | | | | | | | | |
| | | NOTIFICATION DATE | ✓ EVENT | FACILITY + | NAME 🗘 | AGE 🗘 | ORGANIZATION USER | | | | |
| | 02/16/2023 9:08:55 am | 03/02/2023 9:46:57 am | Behavioral Health Admission | UKHC | JAY,PERAL | 31 years | SIT Test_1 (khie_SIT_TEST_01@mailinato com) | | | | |
| 0 | 02/16/2023 9:08:55 am | 03/02/2023 9:46:57 am | Hospital Admission | ИКНС | JAY,PERAL | 31 years | SIT Test_1 (khie_SIT_TEST_01@mailinato com) | | | | |
| | 01/06/2023 8:08:55 am | 02/28/2023 10:06:48 am | Abnormal A1c | AMOHAMMAD | MORA, PAT K | 1 year | SIT Test_1 (khie_SIT_TEST_01@mailinato com) | | | | |
| | 01/06/2023 8:08:55 am | 02/28/2023 10:06:48 am | Possible Positive Test Result for COVID-19 | AMOHAMMAD | MORA, PAT K | 1 year | SIT Test_1 (khie_SIT_TEST_01@mailinato com) | | | | |



- 3. The **Upload Patients** screen displays. The *Upload File* section on the left allows *Administrators* to download the Event Notification Patient Panel Upload file template.
- 4. To download the Patient Panel file template, click the hyperlink: *Event Notification Patient Panel Upload.csv*

| REC | ENT NOTIFICATIONS | DELETE | D NOTIFICATIONS | MANAGE N | OTIFICATIONS | | UPLOAD PATIENTS |
|--------------------|--|--|------------------|---|----------------------------------|--|--|
| | L | Ipload File | | | Select No | tifications | |
| ceptable File Form | Add Patients | O De | ete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMEN EMERGENCY DEPARTMEN BEHAVIORAL HEALTH ADN BEHAVIORAL HEALTH DISC HOSPITAL READMISSION (| T DISCHARGE MISSION CHARGE | SPECIALTY VISIT RESULTS READY F TOXICOLOGY SCR OVERUTILIZATION POSSIBLE POSITIV ABNORMAL A1C | EEN |
| PLOAD | ED FILES LIST | | | | | | |
| HOWING | FILE NAME + | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS | STATUS | DOWNLOAD RESPONSE | |
| HOWING | | DATE UPLOADED • 03/14/2022 08:12 • | DATE PROCESSED • | EVENT NOTIFICATIONS • Mospital Admission, Hospital Discharge, Emergency Department Admission, Speciatly Vait | STATUS Partially Successful | DOWNLOAD | |
| HOWING TTEMS | FILE NAME Clinical Notification Patient List Upload Defect | | DATE MOCESED | Hospital Admission, Hospital Discharge, Emergency Department Admission, | | DOWNLOAD RESPONSE | USER SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) SIT Test_1 |
| Add Patients | FILE NAME Clinical Notification Patient List Upload Defect 473960.csv Clinical Notification Patient List Upload Defect | 03/14/2022 08:12 | 03/14/2022 08:17 | Hospital Admission, Hospital Discharge, Emergency Department Admission, | Partially Successful | COWNLOAD RESPONSE | USER SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) SIT Test_1 (khie_SIT_TEST_01@mailinat |

5. To open the downloaded template, click the **Download Icon** at the bottom left of the screen.

| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
|--|-----------------------|---|---|
| Uploa | d File | Sele | ct Notifications |
| Browse. Maximum upload file size should not exceed SMB Acceptable File Formit is .cv Add Patients Download Template Event Notification Patient Panel Upload.csv | O Delete Patients | 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 OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C LIPIcad Cance |
| UPLOADED FILES LIST | | | |



Complete the Event Notification Patient Panel Upload File

Once downloaded, complete the Patient Panel file template to include the required demographics for each patient on the list. Once completed, the Patient Panel file can be saved to your computer, renamed if desired, and then uploaded to the ePartnerViewer.

| Auto | sSave 💽 🛱 🏷 र 🤄 😵 🗸 👻 Event Notif | ication Patient Panel Upload (2).csv | • | rch (Alt+Q) | | · | | _ œ − _ œ _× |
|-------|---|--------------------------------------|--------------------------------|---|------------------------------|--|--------------------------|---------------------|
| File | Home Insert Draw Page Layout Formulas Data | Review View Help | Acrobat | | | | | 모 Comments 🖻 Share |
| Paste | $ \begin{array}{ c c c c c c c c c c c c c c c c c c c$ | 🗄 🛅 🛅 Merge & Center 🔻 | Sensitivity Sensitivity Number | - Conditional Format as Formatting - Table - T | Bad Calculation Styles | Good Check Cell Unsert Delete Cells | Format | |
| A36 | ▼ : × √ fe | | | | | | | |
| 00 | onfidential \ No Additional Protection 🖌 | | Public | Confidential • High Risk Confidential • | Personal Information | n * | | |
| | А | В | С | D | E | F | G H | 1 |
| 1 | Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City Patient Sta | ate Patient Zipcode |
| 2 | khie_SIT_TEST_01@mailinator.com | Dectein | Julidec | 8/10/1959 | F | 1201 Man O'War Drive | LEXINGTON KY | 40325 |
| 3 | khie_SIT_TEST_01@mailinator.com | Jason | Zaiden | 8/2/2008 | F | 1364 MAN OWAR BVLD | Seneca KY | 40812 |
| 4 | khie_SIT_TEST_01@mailinator.com | Jane | Danyal | 6/21/1985 | M | PO Box 131 | Danville KY | 40484 |
| 5 | khie_SIT_TEST_01@mailinator.com | Jackson | Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA KY | 41230 |
| 0 | khie_SIT_TEST_01@mailinator.com | Kraus | Oblix | 9/17/2012 | M | 254 WALLER BRANCH RD | LOUISA KY | 41230 |
| 6 | | Kirby | lanis | 2/14/1920 | F | 1364 MAN OWAR BVID | Lexington KY | 40812 |
| | khie_SIT_TEST_01@mailinator.com | KIRDV | Janis | 2/14/19/0 | | | | |

Please Note: There is no limit to the number of patients that can be uploaded at once. *Administrators* have the option to upload the entire list of patients for the organization on one Patient Panel file.

If you choose to upload a large volume of patients, you may ask your organization's IT Point of Contact to assist you. The sample template includes the patient demographics needed to trigger event notifications for your patients. Your IT Point of Contact should use these criteria to pull the information from your organization's EMR/EHR system. Once the list of patients has been retrieved and is in the required format, it can be uploaded to the KHIE system.

Enter Demographic Details for Each Patient

Administrators must enter demographic details for <u>each</u> patient added to the Patient Panel file by completing the following steps:

| Save 💽 🌐 ヴィ 🤍 発 ィ マ Event Notif | cation Patient Panel Upload (2).csv 🝷 | ₽ Seat | rch (Alt+Q) | | | | | • - | o × |
|--|---------------------------------------|-------------------------------------|---|----------------------|-----------------|-----------|----------------------------------|------------------|---------|
| Home Insert Draw Page Layout Formulas Data \bigwedge Cut \square Catibri | | Acrobat Sensitivity \$ ~ % \$ | Conditional Format as Normal | Bad | Good Check Cell | te Format | Sort & Find & | Comments | 남 Share |
| Clipboard (5 Font (5) | | Sensitivity Number | rormatting v lable v | Styles | Ce | lis Clear | r * Filter × Select × Editing | Data Analysis | ~ |
| onfidential \ No Additional Protection 🖌 | В | Public | Confidential • High Risk Confidential • | Personal Information | F | G | н | 1 | × |
| Email address used to access ePartnerViewer | - | Patient First Name | Patient DOB(MM/DD/YYYY) | | | | | Patient Zip | code |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |





6. You are required to enter the **Patient's Last Name** and **First Name**.

| | A | В | С | D | E | F | G | Н |
|--------|---|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|--------|
| 1 | Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patien |
| 2 | | Jackson | Milley | | | | | |
| 3 | | | | | | | | |
| 4 5 | | | | | | | | |
| 5 | | | | | | | | |
| | lease Note: The requ | ired fields o | on the Even | t Notification Pat | iont Par | al file are incl | uded in | the |
| | ricuse note. The requ | incu neius c | | i nouncation rat | ient rai | ier me are mer | uucu m | circ |
| | Required Fields on the Ev | | | | | | | circ |

7. You are required to enter the **Patient's Date of Birth** in MM/DD/YYYY format.

| В | С | D | E | F |
|-------------------|--------------------|-------------------------|-------------|------------------------|
| Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address |
| Jackson | Milley | 08/17/2016 | | |
| | | | | |

8. You are required to enter the **Patient Sex**.

| В | С | D | E | F | G | Н |
|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|---------|
| Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient |
| Jackson | Milley | 8/17/2016 | F | | | |
| | | | | | | |
| | | | | | | |

9. You are required to enter the **Patient's Street Address**, **City**, **State**, and **Zip Code**.

| С | D | E | F | G | Н | I | |
|--------------------|-------------------------|-------------|------------------------|--------------|---------------|-----------------|---|
| Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode | |
| Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA | КҮ | 41230 | |
| | | - | | | | | - |

10. Repeat the process of entering the **demographic details** for <u>each</u> patient until all patients have been added to the Event Notification Patient Panel Upload file.

| 1 | A | В | С | D | E | F | G | Н | 1 |
|---|---|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|---------------|-----------------|
| 1 | Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode |
| 2 | | Jackson | Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA | КҮ | 41230 |
| 3 | | Jane | Danyal | 6/21/1985 | м | PO Box 131 | Danville | КҮ | 40484 |
| 4 | | | | | | | | | |



Assign Users to Each Patient

Whether adding or deleting patients, *Administrators* are <u>required</u> to **assign a specific user to <u>EACH</u> patient** entered on the Patient Panel file.

To assign an associated user to **<u>each</u>** specific patient on the Patient Panel file, *Administrators* must complete the following steps:

11. Enter the **email address that the** *Clinical User* **uses to access the ePartnerViewer**. This allows the assigned user to start receiving event notifications for new patients or to stop receiving event notifications for existing patients.

| 1 | A | В | С | D | E | F | G | Н | 1 | | |
|---|---|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|---------------|-----------------|--|--|
| 1 | Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode | | |
| 2 | User_01@mailinator.com | LOUISA | кү | 41230 | | | | | | | |
| 3 | ² Enter the email address of the User who is assigned to start receiving event notifications <u>OR</u> to stop receiving event notifications for the patient listed in the same row. ³ Danville KY 40484 | | | | | | | | | | |
| | Please Note : <i>Administr</i> the ePartnerViewer. | ators mus | t enter the | e email addres: | s that t | he user enter | s to log | gin and | access | | |

12. Repeat the process of entering the appropriate **email address of the** *Clinical User* assigned to <u>each</u> patient on the Event Notification Patient Panel Upload file.

| 1 | A | В | C | D | E | F | G | Н | I |
|---|---|-------------------|--------------------|-------------------------|-------------------|-----------------------------|--------------|---------------|-----------------|
| 1 | Email address used to access ePartnerViewer | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode |
| | User_01@mailinator.com | Doe | Jane | User 1 is assigned | l to start | <u>OR</u> stop receiving e | event noti | fications fo | or Jane Doe. |
| 2 | | | | | | | | | |
| | User_02@mailinator.com | Smith | John | User 2 is assigned | to start <u>(</u> | <u>OR</u> stop receiving ev | ent notifi | cations for | John Smith. |
| 3 | | | | | | | | | |

Upload the Event Notification Patient Panel File

To save the completed Patient Panel file to upload to the ePartnerViewer, *Administrators* must complete the following steps:

13. When the appropriate fields have been completed and all patients have an assigned user, click **File**, located at the top left of the Event Notification Patient Panel Upload file.

| AutoSave 💽 🖫 🏷 イマー 発 🍷 | Event Notification Patient Panel Upload (3).csv • Save | ed 🕶 | 🔎 Search | (Alt+Q) | | | | | | | | | |
|---|--|---------------|----------|--|-----------------|-------------------|--------------------|--------------------|-----|--------------------|----------|-------------------|----------|
| File Home Insert Draw Page Layout | Formulas Data Review View Help | Acrobat | | | | | | | | | | | |
| $\begin{array}{c c} & & & \\ & & & \\ & & \\ & & \\ Paste \\ & \\ Paste \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ $ | A^ A [×] = = = ⊗ [*] × 80 Wrap Text <u>A</u> × = = = = = = = ⊞ Merge & Center × | | • % 9 56 | | | Normal Neutral | Bad Calculation | Good Check Cell | 4 | Insert Delete Form | J Fill 🗸 | Sort & Filter ~ S | |
| Clipboard rs Font | r5a Alignment | 5 Sensitivity | Number | is in the second | J Table - | Stj | les | | | Cells | • | Editing | PERECT - |
| Confidential \ No Additional Protection A B C D E | F G H I J | Public K L | Cor | nfidential + | High Risk Confi | dential - Pers | onal Information | | U V | w | X Y | 7 | AA |
| 1 Email add Patient La Patient Fil Patient D(Patient Sel | | n t | | | - | 4 | | | | | ~ 1 | 2 | |





14. Click Save As.

| | | | Event Notification P | atient Panel Upload (3).csv • Saved | | Ĩ | 0 |
|----------------------|------------------------------|------------------------------------|------------------------------|-------------------------------------|-----------------------|--|-------------------------|
| © | Good afternoon | | | | | | ~ |
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| 🗅 New | A B C | | | | Project Planner | The second secon | |
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| Info | 0 7 | • | ſx | | | | |
| Save | Blank workbook Team roster, | ; schedule, and c Welcome to Excel | Formula tutorial | PivotTable tutorial | Gantt project planner | Simple Gantt Chart | Weekly schedule planner |
| Save As | | | | | | | |
| Save as Adobe PDF | ∠ Search | | | | | | |
| Print | Recent Pinned Shared with Me | | | | | | |
| Share | 🗅 Name | | | | | Date modified | |
| Export | | | | | | | |
| Publish | Xa | | | | | | |
| Close | | | | | | | |
| | | | | | | 100 | |

15. The *Save As* pop-up displays. To save the Event Notification Patient Panel Upload file, **Select CSV UTF-8 (Comma delimited)(*.csv)** from the dropdown.

| Organize • New | w folde | er | | | | | | | - | ? |
|--|---------|----------------|--------------|------------|-------|-------|-----|--------|----------|--------|
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| Pictures Videos OSDisk (C:) | l | | | | | | | | | |
| | ~ | < | | | | | | | | > |
| File name: | Event | t Notification | Patient Pane | el Upload | | | | | | \sim |
| Save as type: | CS | V UTF-8 (Co | omma delir | mited) (*. | csv) | | | | | \sim |
| Authors: | | | | | Tags: | Add a | tag | | | |
| Hide Folders | | | | | Tools | • | S | ave | Can | cel |

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- 16. You have the option to change the file name of the Event Notification Patient Panel Upload file in the *File Name* field. For example, the file name could be: **User 1 Patient Panel Add_04-01-2023**
- 17. To save the **Event Notification Patient Panel Upload.csv** on your computer, click **Save**.

| Organize • New | w folder | III - 🥑 |
|----------------|--|---------------|
| 3D Objects | ^ Name | Date modified |
| E Desktop | | |
| Documents | | |
| Downloads | | |
| Music | | |
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| 🔩 OSDisk (C:) | | |
| | ~ < | > |
| File name: | Event Notification Patient Panel Upload_Add Patier | nts 1 🛛 🗸 🗸 |
| Save as type: | CSV UTF-8 (Comma delimited) (*.csv) | ~ |
| Authors: | Tags: A | Add a tag |
| | | |
| ∧ Hide Folders | Tools | Save Cancel |

18. On the **Upload Patients** screen, click **Browse** within the *Upload File* section to find and upload the completed Patient Panel.

| KHIE ePartnerViewer | | 🖂 Suppor | t 📢 Announcements 🏮 🌲 Advisories 🍓 😝 SIT Test_1 |
|---|-----------------------|---|--|
| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry • |
| Home > Notifications | | | |
| | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload Fil | e | Select N | otifications |
| Browse Maximum upload file size should not exceed SMB Acceptable File Format is.csv | ○ Delete Patients | 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 OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C LUpload Cancel |
| UPLOADED FILES LIST | | | |



- 19. Select the completed **Event Notification Patient Panel Upload file**.
- 20. Click **Open** to enter your completed **Event Notification Patient Panel Upload file** into the *Upload File* section.

| Patient S | Search | Bookmarked Patient | s | | Event Notifications | Lab Data Entry - |
|--|---|---|---------------|---------------------|---------------------|--|
| Home 🗲 Notifica | ations | | | - | | |
| | Deen | | | | | × |
| | $\leftarrow \rightarrow \cdot \uparrow \checkmark$ This P | °C → Downloads | | | | ✓ ♥ |
| RECEN | Organize • New folder | | | | |)III • 🔳 🔮 |
| | Team Lead Updates ^ TEmplates | Name | Date modified | Туре | Size | |
| Browse Maximum upload file si Acceptable File Format i | This PC 3D Objects Desktop Documents | Event Notification Patient Panel Upload.cst A long time ago (2) | v | Microsoft Excel Cor | п 1 КВ | |
| Download Templat | Downloads Music Pictures Videos OSDisk (C:) | | | | | DVID-19 |
| UPLOADE | v | Event Notification Patient Panel Upload.csv | | | | Microsoft Excel Comma Separal Open Cancel |
| | | | | | | |

21. Your completed **Event Notification Patient Panel Upload file** displays in the *Upload File* section.

| ePartnerViewe | r | | |
|--|-----------------------|---|---|
| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry - |
| Home > Notifications | | | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| Upload | File | Select | t Notifications |
| Browse Event Notification Patient Panel Upload.csv | 0 | HOSPITAL ADMISSION HOSPITAL DISCHARGE | SPECIALTY VISIT RESULTS READY FOR REVIEW |
| laximum upload file size should not exceed 5MB cceptable File Format is .csv | | EMERGENCY DEPARTMENT ADMISSION | |
| Add Patients | Delete Patients | EMERGENCY DEPARTMENT DISCHARGE | |
| | o belete Huterio | BEHAVIORAL HEALTH ADMISSION BEHAVIORAL HEALTH DISCHARGE | POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C |
| | | HOSPITAL READMISSION (OTHER FACILITY) | |
| Download Template | | | ≵ Upload Can |
| Event Notification Patient Panel Upload.csv | | | |
| | | | |

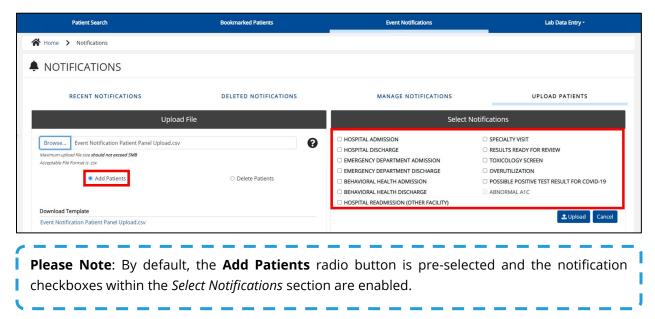


Add Patients to a Clinical User's Patient Panel

When uploading the completed Event Notification Patient Panel Upload file to the ePartnerViewer, *Administrators* have the option to either add new patients <u>or</u> delete existing patients from a *Clinical User*'s patient panel in the ePartnerViewer.

To **add** a bulk list of new patients to a *Clinical User's* patient panel in the ePartnerViewer, *Administrators* must complete the following steps when uploading the Event Notification Patient Panel file:

- 22. Under the *Upload File* section, click **Add Patients**.
- 23. Under the *Select Notifications* section, select the **appropriate checkboxes** next to the event notification types that the *Clinical User* wishes to receive for each patient listed on the completed Patient Panel file.



24. Once the appropriate notification checkboxes have been selected under the *Select Notifications* section, click **Upload** to upload the completed Event Notification Patient Panel file.

| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAG | SE NOTIFICATIONS | UPLOAD PATIENTS |
|--|-----------------------|---|--|---|
| Upload File | 2 | | Select N | Notifications |
| Browse Event Notification Patient Panel Upload.csv Maxmum upload file size should not exceed SMB Acceptable File Format is.csv Add Patients | O Delete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTM EMERGENCY DEPARTM BEHAVIORAL HEALTH BEHAVIORAL HEALTH HOSPITAL READMISSIC | MENT ADMISSION MENT DISCHARGE ADMISSION DISCHARGE | SPECIALTY VISIT CRESULTS READY FOR REVIEW TOXICOLOGY SCREEN OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C |
| Download Template Event Notification Patient Panel Upload.csv | | | | 1 Upload Cancel |
| UPLOADED FILES LIST | | | | |





25. The *Upload Patients* pop-up displays showing the Patient Panel file was uploaded successfully. Click **OK** to proceed.

| 📜 E 🕴 ePartnerVi | iewer | BS Sup | oport 📢 Announcements 👔 🌲 Advisories 🐴 🕘 SIT Test |
|--|---|---|--|
| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry + |
| Home > Notifications | | | |
| NOTIFICATIONS | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| | Upload File Upload Patients | × Selec | t Notifications |
| Browse Event Notification Patient Panel Up Adamum uplead file site should not exceed SMB Acceptable File Formatis .car | pload_Add Patients 1.csv File uploaded successfully | | SPECIALTY VISIT RESULTS READY FOR REVIEW TOXICOLOGY SCREEN |
| Add Patients Download Template | O Delete Patients | BEHAVIORAL HEALTH ADMISSION BEHAVIORAL HEALTH DISCHARGE HOSPITAL READMISSION (OTHER FACILITY) | POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C |
| Event Notification Patient Panel Upload.csv | | | 2 Upload Cancel |

26. The *Uploaded Files List* section displays the recently uploaded Event Notification Patient Panel files. Once the Patient Panel file has been successfully processed, the *Clinical User*(s) will start receiving the selected event notification types for each patient on the bulk list.

| SHOWING 10 ITEMS | HOWING 0 ITEMS | | | | | | | | |
|---------------------|--|------------------|-------------------|---|----------------------|----------|---|--|--|
| ACTION | FILE NAME | DATE UPLOADED \$ | DATE PROCESSED \$ | EVENT NOTIFICATIONS | STATUS + | DOWNLOAD | USER • | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility, Speciality Visit, Results Ready for Review, Toxicology Szoebie Positive Test Result for CVID-19 | Pending | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | |
| | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Partially Successful | ± | SIT Test_1 (khle_SIT_TEST_01@mailinator.co m) | | |
| | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:06 | 03/14/2022 08:07 | | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | |
| | Clinical Notification Patient List Upload Template (4).csv | 03/14/2022 08:03 | 03/14/2022 08:07 | | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | |

Please Note: After uploading the Event Notification Patient Panel file, *Administrators* can confirm that the assigned *Clinical User(s)* start receiving event notifications for the newly added patients.

_ _ _ _ _ _ _ _ _



Delete Existing Patients from a Clinical User's Patient Panel

Using the bulk upload template to delete existing patient(s) from a *Clinical User*'s patient panel in the ePartnerViewer, *Administrators* must complete the following steps when uploading the Event Notification Patient Panel file:

27. Under the *Upload File* section, click **Delete Patients**.

| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry - | | | |
|--|--|---|---|--|--|--|
| Home > Notifications | | _ | | | | |
| NOTIFICATIONS | | | | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS | | | |
| Upload File | | Select Notifications | | | | |
| Browse Event Notification Patient Panel Upload.csv Aasimum upload file size should not exceed SMB Acceptable File Format is.csv Add Patients Download Template Event Notification Patient Panel Upload.csv | Delete Patients | 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 OVERUTILIZATION POSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C Cancel | | | |
| Please Note : Upon clicking and the event notification of notifications in this case notifications for the patient | heckboxes will be di because the assign | sabled. The <i>Administrato</i> ed user no longer war | <i>r</i> will <u>not</u> select any event ats to receive any event | | | |

28. Under the *Select Notifications* section, click **Upload** to upload the completed Event Notification Patient Panel file.

| Upload File | Select Notifications |
|---|--|
| Ownee: Event Notification Patient Panel Upload.csv Image: State | |
| Add Patients Add Patients Add Patients Add Patients Add Patients BeHavioraL HEALTH A BEHAvioraL HEALTH A BEHAvioraL HEALTH C HOSPITAL READMISSIO | GE RESULTS READY FOR REVIEW RTMENT ADMISSION TOXICOLOGY SCREEN RTMENT DISCHARGE OVERUTILIZATION FH ADMISSION POSSIBLE POSITIVE TEST RESULT FOR COVID FH DISCHARGE ABNORMAL A1C |
| ent Notification Patient Panel Upload.csv | |





29. The *Upload Patients* pop-up displays indicating the file was uploaded successfully. Click **OK** to proceed.

| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
|---|----------------------------------|-----------------------------|--|
| Upload | l File | Sele | ct Notifications |
| Browsc Event Notification Patient Panel Upload_Add Maximum upload file size should not exceed 5MB Acceptable Format is.csv | Patients 1.csv Upload Patients | HOSPITAL ADMISSION | |
| Add Patients | File uploaded successfully Dele | DISCHARGE SSION HARGE | OVERUTILIZATION OSSIBLE POSITIVE TEST RESULT FOR COVID-19 ABNORMAL A1C |
| Download Template | | THER FACILITY) | |
| Event Notification Patient Panel Upload.csv | | | t Upload Cancel |
| UPLOADED FILES LIST | | | |

30. The *Uploaded Files List* section displays the recently uploaded Patient Panel file. Once the Patient Panel file has been successfully processed, the *Clinical User*(s) will stop receiving event notifications for each patient deleted from their patient panel.

| UPLOADE | D FILES LIST | | | | | | | | | |
|---------------------|---|------------------|-------------------|--|----------------------|----------------------|---|--|--|--|
| SHOWING 11 ITEMS | SHOWING 11 ITEMS | | | | | | | | | |
| ACTION \$ | FILE NAME | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS \$ | STATUS \$ | DOWNLOAD RESPONSE | USER \$ | | | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | | | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility), Specially Visit, Results Ready for Review, Toxicology Screen, Overutilization, Possible Possible Possible Tesult for COVID-19 | Partially Successful | ŧ | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) | | | |
| | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) | | | |

Please Note: After uploading the Event Notification Patient Panel file, *Administrators* can confirm
that the assigned *Clinical User(s)* stop receiving event notifications for the patient(s) who were
deleted.

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|---|----|----------|---|---|---|
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Please Note: The Event Notification Patient Panel Upload file must meet the following criteria. If the Event Notification Patient Panel Upload file does <u>**not**</u> meet the criteria, the following errors will display when uploading the file:

- 1. The Event Notification Patient Panel Upload file must be a .csv file type.
- If the file is not a .csv file type, the following error message displays: "*Invalid file type uploaded*, *please upload a .csv file.*"
- 2. The Event Notification Patient Panel Upload file must be under five (5) megabytes (MB) in size.
- If the file exceeds five (5) MBs, the following error displays: "Uploaded file exceeds the size limit of 5mb, please upload another file."
- 3. The file name of the Event Notification Patient Panel Upload file must be under 100 characters.
- If the file name is over 100 characters, the following error displays: *"The file name cannot exceed 100 characters, please name it appropriately."*
- 4. The Event Notification Patient Panel Upload file must retain the defined headers (i.e., *Email Address used to access ePartnerViewer, Patient Last Name*, etc.) in the correct order.
- If the headers are not in the correct order, the following error displays: *"Invalid file uploaded, please upload a valid file."*

| NOTIFIC | ATIONS | | | | | | |
|---|--|------------------|------------------|---|---|--|---|
| R | ECENT NOTIFICATIONS | DELETE | D NOTIFICATIONS | MANAGE N | OTIFICATIONS | | UPLOAD PATIENTS |
| | 1 | Jpload File | | | Select Notifica | itions | |
| Browse Eve Maximum upload file Acceptable File Forma Download Templa Event Notification | oaded, please upload a valid file int Notification Patient Panel Upload.csv size should not exceed SMB is .cv O Add Patients | • Del | ete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMENT AD EMERGENCY DEPARTMENT OB EHAVIORAL HEALTH ADMISSI EHAVIORAL HEALTH DISCHAR HOSPITAL READMISSION (OTH | MISSION 0 T CCHARGE 0 C ON 0 F RGE 0 A | EPECIALTV VISIT RESULTS READY FOR YOXICOLOGY SCREE DVERUTILIZATION OSSIBLE POSITIVE INBNORMAL A1C | |
| SHOWING 10 ITEMS | | | | | | | |
| ACTION | FILE NAME | DATE UPLOADED \$ | DATE PROCESSED + | EVENT NOTIFICATIONS + | STATUS + | DOWNLOAD RESPONSE | USER \$ |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility), Specialty Visit, Results Readv for Review, | Pending | ¥ | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |



4 Review Uploaded Event Notification Patient Panel Files

Administrators can review a previously uploaded file from the *Uploaded Files List* section on the **Upload** File screen. The *Uploaded Files List* displays the Event Notification Patient Panel files that have been previously uploaded.

| - <u>~</u> | ePartnerVie | | | | | | |
|--|---|------------------|----------------------|---|------------------------------|---|--|
| Pat | ient Search | Bookma | arked Patients | Event No | tifications | | Lab Data Entry - |
| Home > N | lotifications | | | _ | | | |
| NOTIFIC | CATIONS | | | | | | |
| REC | ENT NOTIFICATIONS | DELET | ED NOTIFICATIONS | MANAGE N | NOTIFICATIONS | | UPLOAD PATIENTS |
| | | Upload File | | | Select N | lotifications | |
| rowse imum spiload file size shoub pracile Rie Format is .cov vniload Tempfate nt Notification Pacient | Add Patients | | Delets Patients | HOSPITAL ADMISSION HOSPITAL READMISSION HOSPITAL READMISSION HEINVIORAL HEALTH DISCHARE HEINVIORAL HEALTH DISCHARE HOSPITAL READMISSION (OTHER FAC | GE | SPECIALTY VISIT RESULTS READY FOR REV TOXICOLOGY SCREEN OVERUTILIZATION OSSBILL POSITIVE TEST ABNORMAL A1C | |
| PLOADED F | ILES LIST | | | | | | |
| SHOWING 11 ITEMS | | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS | STATUS | DOWNLOAD | Ø REFRESH ▼ APPLY FIL |
| SHOWING 11 ITEMS ACTION • Delete Patients | | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS | STATUS Pending | DOWNLOAD RESPONSE | |
| SHOWING 11 ITEMS ACTION \$ | FILE NAME © | | DATE PROCESSED O | EVENT NOTIFICATIONS P Hospital Admission, Hospital Discharge, Emergency Department, Admission, Emergency Department, Admission, Behavioral Health Admission, Behavioral Health Discharge, Rospital Readmission (other facility), Speciality Visit, Results Readvis Vor Review, Toxicology Screen, Toxicology Screen, Toxicology Screen, Test Result, for COVID-19 | | RESPONSE | USER SiTTest_1 (chie_SIT_TEST_01@mailinator m) SiTTest_1 |
| SHOWING 11 ITTEMS ACTION • Delete Patients | FILE NAME • Event Notification Patients 1.csv Event Notification Patient Panel | 03/27/2023 18-28 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility), Speciality Visit, Results, Ready for Review, Toxicology Screen, Overutilization, Possible Positive | Pending | RESPONSE | USER SiT Test_1 (khie_SiT_TEST_01@mailinator m) |
| NCTION CONTINUES | FILE NAME Image: Constraint of the second | 03/27/2023 18:28 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Discharge, Hospital Readmission (other facility), Speciality Visit, Results Ready for Review, Toxicology Screen, Overvuillation, Possible Positive Test Result for COVID-19 Hospital Admission, Hospital Discharge, Emergency | Pending Partially Successful | ESPONSE | USER SIT Test_1 (khie_SIT_TEST_01@mailinator m) SIT Test_1 (khie_SIT_TEST_01@mailinator m) SIT Test_1 (khie_SIT_TEST_01@mailinator |



Uploaded Files List Enhancements

The *Uploaded Files List* section on the **Upload Patients** screen allows *Administrators* to easily review the details of previously uploaded Event Notification Patient Panel files.

- 1. The *Uploaded Files List* section includes the *Action* column, the *Event Notifications* column, and the *Download Response* column.
- The *Action* column indicates whether the *Administrator* clicked the **Add Patients** or the **Delete Patients** radio button when uploading the Patient Panel file.
- The *Event Notifications* column displays the selected event notifications that the assigned user(s) will receive for the patient(s) listed on the Patient Panel file.
- The *Download Response* column provides the option to download a previously uploaded Patient Panel file that has been fully processed. This file contains the processing status to indicate whether the uploaded Patient Panel file was successfully processed or not.

| SHOWING 11 ITEMS | | | | | | | | |
|---------------------|--|------------------|-------------------|---|----------------------|----------------------|---|--|
| ACTION + | FILE NAME | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS | STATUS - | DOWNLOAD RESPONSE | USER | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | | | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission. Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility, Specially Visit, Results Ready for Review, Toxicology Screen, Overstillization, Possible Positive Test Result for COVID-19 | Partially Successful | ٤ | SIT Test_1 (khie_SIT_TEST_01@mailinator.c m) | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | ٤ | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | |
| Delete Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Partially Successful | 1 | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | |
| Add Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:06 | 03/14/2022 08:07 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | |

2. The *Uploaded Files List* section includes the *Status* hyperlink. Upon clicking the hyperlink, a popup displays the descriptions of each processing status.

| UPLOADE | D FILES LIST | | | | | | | |
|--------------------|---|------------------|-------------------|--|-----------------|----------------------|---|------|
| SHOWING 8 ITEMS | | | | | | | TER | |
| ACTION \$ | FILE NAME | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS | <u>STATUS</u> ÷ | DOWNLOAD RESPONSE | USER | ¢ |
| Add Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Specialty Visit | Pending | Ł | SIT Test_1 (khie_SIT_TEST_01@mailina r.com) | iato |



Event Notifications Patient Panel Bulk Uploads User Guide_2023-04-04_v1.0



| SHOWING | | | | A | |
|--------------------|--------------------------------|----------------------|--|---|-----------------------------------|
| TTTENIS | | PROCESSING STATUS | PROCESS STATUS DESCRIPTION | | |
| ACTION 🗘 | FILE | Successful | The Patient Panel List was successfully processed. • Event notifications will be generated for patient(s) included on this Patient Panel List. | | ÷ |
| Delete Patients | Even Patie Uplo 1.csv | Partially Successful | Not all patients on this Patient Panel List were processed successfully. Some of the patient records were not processed successfully. Event notifications will be generated only for the patient records that were processed successfully. • Event notifications will not be generated for the patient record(s) that were not processed completely. | | st_1 SIT_TEST_01@m or.com) |
| | | Pending | The Patient Panel List has <u>not</u> yet been fully processed. Event notifications will <u>not</u> be generated for the patients on this Patient Panel List until the file has been processed successfully. | | |
| Add Patients | Even Patie Uplo 1.csv | Unsuccessful | The Patient Panel List does <u>not</u> meet the defined file structure or contains errors and could <u>not</u> be processed successfully. This means that <i>none</i> of the patient records on the Patient Panel List were processed successfully. • Event notifications will <u>not</u> be generated for <i>any</i> patients on this Patient Panel List. | | st_1 SIT_TEST_01@m .or.com) |

Processing Status of Uploaded Event Notification Patient Panel Files

3. The *Status* column in the *Uploaded Files List* section displays the processing status of previously uploaded Patient Panel files.

| showing 11 ITEMS | | | | | | | | |
|---------------------|--|------------------|-------------------|--|----------------------|----------------------|---|--|
| ACTION \$ | FILE NAME | DATE UPLOADED \$ | DATE PROCESSED \$ | EVENT NOTIFICATIONS + | STATUS • | DOWNLOAD RESPONSE | USER | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | | | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Discharge, Hospital Readmission (other facility, Specialty Visit, Results Ready for Review, Toxicology Screen, Overutilization, Possible Positive Test Result for COVID-19 | Successful | ż | SiT Test_1 (khie_SiT_TEST_01@mailinator.c m) | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.c m) | |
| Delete Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Unsuccessful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.c m) | |
| Add Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:06 | 03/14/2022 08:07 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.c m) | |



The table below defines the four (4) processing statuses relating to previously uploaded Event Notification Patient Panel files:

| Processing Status | Process Status Description |
|-------------------------|--|
| Successful | The Patient Panel List was successfully processed. Event notifications will be generated for patient(s) included on this Patient Panel List. |
| Partially Successful | Not all patients on this Patient Panel List were processed successfully. Some of the patient records were not processed successfully. Event notifications will be generated only for the patient records that were processed successfully. Event notifications will not be generated for the patient record(s) that were not processed completely. |
| Pending | The Patient Panel List has <u>not</u> yet been fully processed. Event notifications will <u>not</u> be generated for the patients on this Patient Panel List until the file has been processed successfully. |
| Unsuccessful | The Patient Panel List does <u>not</u> meet the defined file structure or contains errors and could <u>not</u> be processed successfully. This means that <i>none</i> of the patient records on the Patient Panel List were processed successfully. Event notifications will <u>not</u> be generated for <i>any</i> patients on this Patient Panel List. |

• When uploading the Patient Panel file, the *Uploaded Files List* section displays the **Pending** Status until the file uploaded has been fully processed.

| UPLOADE | ED FILES LIST | | | | | | | |
|---------------------|--|------------------|-------------------|---|----------------------|----------------------|--|--|
| SHOWING 12 ITEMS | | | | | | | | |
| ACTION \$ | FILE NAME 🗘 | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS \$ | STATUS \$ | DOWNLOAD RESPONSE | USER | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Pending | ţ | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailina r.com) | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility), Specialty Visit, Results Ready | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) | |



i



• Once the Patient Panel file has been processed successfully, the *Uploaded Files List* section displays the *Successful* Status.

| JPLOADE | D FILES LIST | | | | | | | REFRESH TAPPLY FILTER |
|---------------------|--|------------------|------------------|---|--|----------------------|----------------------|---|
| SHOWING 12 ITEMS | | | | | | | | CREFRESH APPLY FILTER |
| ACTION \$ | FILE NAME \$ | DATE UPLOADED | DATE PROCESSED | ¢ | EVENT NOTIFICATIONS \$ | STATUS \$ | DOWNLOAD RESPONSE | USER \$ |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |

Please Note: On the **Manage Notifications** screen, when the uploaded Event Notification Patient Panel file has been successfully processed, each patient name from the Patient Panel file will automatically display under the assigned user's *Existing Patients*.

| | IFICATIONS | DELET | ED NOTIFICATIONS | _ | MANAGE NOTIFICAT | IONS | UPLOAD PA | TIENTS |
|--|--|--|--|---|---|--------------------------------------|---|--|
| SELECT A U SIT Test_1 (khie_SIT_TEST Retrieve | USER FROM TH | IE LIST | | | | | | |
| Jser Preferenc | es: | | | | | | | |
| USER NAME | HOSPITAL ADMISSION | HOSPITAL DISCHARGE | EMERGENCY DEPARTMENT ADMISSION | EMERGENCY DEPARTMENT DISCHARGE | BEHAVIORAL HEALTH ADMISSION | BEHAVIORAL HEALTH DISCHARGE | HOSPITAL READMISSION (OTHER FACILITY) | SPECIALTY VISIT |
| SIT Test_1 (khie_SIT_TEST_01@ma ilinator.com) | | | | 12 | | | | |
| 4 | _ | | | | _ | | Edit | User Preferences |
| Existing Patient | pr | ocessed, each | patient name | from the uplo | Upload file has baded Patient P h the Manage N | anel file will d | fully isplay | |
| | pr | ocessed, each | patient name | from the uplo | oaded Patient P | anel file will d | fully isplay | HOSPITAL |
| SHOWING 21 ITEMS | pr un | ocessed, each der the assign | patient name ed user's <i>Exist</i> | e from the uplo ing Patients or | aded Patient P the Manage N | anel file will di lotifications s | fully isplay screen. | HOSPITAL READMISSION (|
| 21 ITEMS | USER NAME SIT Test_1 (khie_SIT_TEST_01@ma | ocessed, each der the assign HOSPITAL ADMISSION | patient name ed user's <i>Exist</i> | e from the uplo ing Patients or | baded Patient P the Manage N DISCHARGE | anel file will di lotifications s | fully isplay screen. bischarge | HOSPITAL READMISSION (FACILITY) |
| SHOWING 21 ITEMS PATIENT NAME MILEY JACKSON | USER NAME SIT Test_1 (khie_SIT_TEST_01@ma ilinator.com) SIT Test_1 (khie_SIT_TEST_01@ma | OCCESSED, Each der the assign HOSPITAL ADMISSION | patient name ed user's <i>Exist</i> | from the uplo ing Patients or Operation | Department DEPARTMENT DISCHARGE | anel file will d lotifications s | fully isplay screen. bischarge | HOSPITAL READMISSION (FACILITY) |



• If only some of the patients on the Patient Panel file have been processed successfully, the *Uploaded Files List* section displays the *Partially Successful* Status. Event notifications will be generated only for the patients processed successfully.

| JPLOADE | D FILES LIST | | | | | | |
|---------------------|--|------------------|-------------------|--|----------------------|----------------------|---|
| SHOWING 12 ITEMS | | | | | | | CREFRESH TAPPLY FILTER |
| ACTION \$ | FILE NAME \$ | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS \$ | STATUS + | DOWNLOAD RESPONSE | USER |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Partially Successful | ¥ | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |

• If the Patient Panel file does <u>not</u> meet the defined file structure or contains errors and could <u>not</u> be processed successfully, the *Uploaded Files List* section displays the *Unsuccessful* Status.

| SHOWING 12 ITEMS | | | | | | ŕ | CREFRESH TAPPLY FILTER |
|---------------------|--|------------------|-------------------|---|----------------------|----------------------|--|
| ACTION \$ | FILE NAME | DATE UPLOADED \$ | DATE PROCESSED \$ | EVENT NOTIFICATIONS | STATUS + | DOWNLOAD RESPONSE | USER |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Unsuccessful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility), Specialty Vist, Results Ready for Review, Toxicology Screen, Overutilization, Possible Positive Test Result for COVID-19 | Partially Successful | ٤ | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) |





Filter Previously Uploaded Event Notification Patient Panel Files

1. To search for a specific previously uploaded Event Notification Patient Panel Upload file, click Apply Filter.

| SHOWING 11 ITEMS | | | | | | | CREFRESH APPLY FILTER |
|---------------------|--|------------------|-------------------|---|----------------------|----------|---|
| | | | | | | DOWNLOAD | |
| ACTION \$ | FILE NAME \$ | DATE UPLOADED \$ | DATE PROCESSED \$ | EVENT NOTIFICATIONS \$ | STATUS | RESPONSE | USER 🗘 |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | | | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other Facility, Specialty Wist, Results Ready for Review, Toxicology Screen Overualization, Deskible Positive Test Result for COVID-19 | Partially Successful | ٤ | SiT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | ٤ | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Delete Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Partially Successful | ٤ | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |

2. The Filter fields display. Search by entering the Action, File Name, Date Uploaded, Date Processed, *Event Notifications, Status*, and/or the *User* in the corresponding Filter fields.

| ACTION 0 | FILE NAME Content of the Name | All v | All ~ | EVENT NOTIFICATIONS Enter Event Notifications | STATUS • | DOWNLOAD RESPONSE | USER Enter User |
|-----------------|--|------------------|----------------------|---|----------------------|----------------------|---|
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | | | Pending | A | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1:csv | 03/27/2023 18:14 | 03/27/2023 18:16 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility, Specially Visit, Results Ready for Review, Toxicology Szcensin, Possible Test, Result for Colb-19 | Partially Successful | | SrT Test_1 (khie_SrT_TEST_01@mailinator.o m) |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 16:04 | 03/27/2023 16:06 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Delete Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| Add Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:06 | 03/14/2022 08:07 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) |
| | | First | Back 1 2 3 Next Last | | | | Maximum 5 + entries per p |

Administrators within your organization.



Download Previously Uploaded Event Notification Patient Panel Files

Administrators can view the status of a previously uploaded Event Notification Patient Panel file on the **Upload Patients** screen. The *Uploaded Files List* section provides the option to download a previously uploaded Patient Panel file that has been fully processed. This file contains the **Success** or **Error** status to indicate whether the uploaded Patient Panel file was successfully processed or not. If the processing status is listed as **Unsuccessful**, Administrators can download the file to view the reason(s) the individual patient(s) had errors.

• The file with the *Unsuccessful* status includes the details of the error on the previously uploaded Event Notification Patient Panel file.

| | D FILES LIST | | | | | | | | | | |
|---------------------|--|------------------|------------------|--|----------------------|----------------------|---|--|--|--|--|
| SHOWING 12 ITEMS | 40WING 2 TEEMS ▼ APPLY FILTER | | | | | | | | | | |
| ACTION \$ | FILE NAME \$ | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS + | STATUS ÷ | DOWNLOAD RESPONSE | USER | | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinate r.com) | | | | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | Unsuccessful | 4 | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) | | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) | | | | |
| Delete Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:28 | 03/27/2023 18:31 | | Partially Successful | ± | SIT Test_1 (khie_SIT_TEST_01@mailinat r.com) | | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/27/2023 18:14 | 03/27/2023 18:16 | 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, Overutilization, Possible Positive Test Result for COVID-19 | Partially Successful | ż | SiT Test_1 (khie_SIT_TEST_01@mailinate r.com) | | | | |

To download a previously uploaded Patient Panel file, complete the following steps:

- 1. Navigate to the *Uploaded Files List* section on the **Upload Patients** screen.
- 2. Click the **Download Icon** under the *Download Response* column next to the appropriate file.

| ACTION \$ | FILE NAME | DATE UPLOADED | DATE PROCESSED \$ | EVENT NOTIFICATIONS + | STATUS \$ | DOWNLOAD RESPONSE | USER \$ |
|--------------|--|------------------|-------------------|--|--------------|----------------------|---|
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Unsuccessful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |



l



Please Note: *Administrators* cannot download the files for uploaded Patient Panel files that have <u>not</u> been fully processed. The **Download Icon** is grayed out and disabled for Patient Panel files marked as *Pending*.

| UPLOADE | D FILES LIST | | | | | | | | | | | |
|---------------------|--|------------------|------------------|--|----------------------|----------|--|--|--|--|--|--|
| SHOWING 11 ITEMS | OWING ITEMS | | | | | | | | | | | |
| ACTION \$ | FILE NAME | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS | <u>STATUS</u> + | DOWNLOAD | USER + | | | | | |
| Enter Action | Enter File Name | All | All 🗸 | Enter Event Notifications | Enter Status | RESPONSE | Enter User | | | | | |
| Delete Patients | Event Notification Patient Panel-Delete Patients.csv | 03/20/2023 18:28 | | | Pending | * | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/18/2023 18:14 | 03/18/2023 18:16 | 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, Overutilization, Possible Positive Test Result for COVID-19 | Unsuccessful | 4 | SIT Test_1 (khie_SIT_TEST_01@maillinator.co m) | | | | | |
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 03/17/2023 12:15 | 03/17/2023 12:20 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | | | | |
| Delete Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:12 | 03/14/2022 08:17 | | Unsuccessful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | | | | |
| Add Patients | Clinical Notification Patient List Upload Defect 473960.csv | 03/14/2022 08:06 | 03/14/2022 08:07 | Hospital Admission, Hospital Discharge, Emergency Department Admission | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinator.co m) | | | | | |

3. Click the **Download Icon** at the bottom left.

| KĤIE ePartnerViewe | er | 8 | 🛿 Support 📢 Announcements 👩 🐥 Advisories 🕢 😝 SIT Test_1 * |
|---|-------------------------------------|--|--|
| Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry - |
| Home > Notifications | | | |
| | | | |
| RECENT NOTIFICATIONS | DELETED NOTIFICATIONS | MANAGE NOTIFICATIONS | UPLOAD PATIENTS |
| | Upload File | Select | Notifications |
| Browse Maimam upland file size should not exceed SMB Acceptable File Format is .csv | Delete Patients | HOSPITAL ADMISSION HOSPITAL DISCHARGE EMERGENCY DEPARTMENT ADMISSION EMERGENCY DEPARTMENT DISCHARGE EHAVIORAL HEALTH ADMISSION BEHAVIORAL HEALTH DISCHARGE HOSPITAL READMISSION (OTHER FACILITY) | SPECIALTY VISIT SEADY FOR REVIEW VOUCLOGY SCREEN OVERUTILIZATION OVERUTILIZATION ABNORMAL A1C Cancel |
| UPLOADED FILES LIST | | | |
| | DATE UPI OADED DATE PROCESSED | EVENT NOTIFICATIONS | DOWNLOAD IJSER e |
| i0000000##20230csv ^ | | | Show all |



- 4. In the downloaded file, users can view the processing status for each individual patient name on the Patient Panel file.
- If the Event Notification Patient Panel file was **not** processed successfully (i.e., **Unsuccessful**), the file displays the following values:
 - The *Error* status displays for all the patient(s) that were not processed successfully.
 - The **error description** displays to clarify the reason why the patient(s) were not processed successfully.

| ACTION 🗘 | FILE NAME | DATE UPLOADED | DATE PROCESSED | EVENT NOTIFICATIONS | STATUS \$ | DOWNLOAD RESPONSE | USER 🗘 |
|--------------|--|------------------|------------------|--|--------------|----------------------|---|
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Unsuccessful | ¥ | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |

| | В | C | D | E | F | G | Н | 1 | J | ĸ |
|---|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|---------------|-----------------|--------|---|
| 1 | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode | Status | Error_Description |
| 2 | Jackson | Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA | КY | 41230 | Error | Invalid KOG email or association not found with Organization |
| 3 | Jane | Danyal | 6/21/1985 | м | PO Box 131 | Danville | KY | 40484 | Error | Invalid KOG email or association not found with Organization |
| 4 | | | | | | | | | | |

- If all the patient(s) listed on the Patient Panel file were processed successfully (i.e., *Successful*), the file displays the following values:
 - The *Successful* status displays for all the patient(s).

| Add Patients Event Notification Patient: Panel Upload, Add Patients 04/04/2023 14:58 04/04/2023 15:00 Hospital Admission, Hospital Discharge, Department Admission, Energency Department Admission, Discharge, Departonent Admission, Energency Department Admission, Energency Department Admission, Energency Department Admission, Discharge, Departonent Admission, Energency Department Admission, Energency Department Admission, Discharge, Departonent Admission, Energency Department Admission, Energency Department Admission, Energency Department Admission, Discharge, Departonent Admission, Energency Department Ad | | ACTION = | FILE N | IAME 🗘 | DATE UPLOADED 🗢 | DATE PROCESSED | ¢ | EVENT NOTIFICATION | s 🕈 | STATUS | ¢ | DOWNLOAD | USER |
|---|---|--------------|--------|--------------------|----------------------|------------------|----------|---|--------------------------------|----------------------|-------|------------|-----------------------------|
| 1 Patient Last Name Patient First Name Patient DOB(MM/DD/YYYY) Patient Sex Patient Street Address Patient City Patient State Patient Zipcode Status 2 Jackson Milley 8/17/2016 F 254 WALLER BRANCH RD LOUISA KY 41230 Success | | Add Patients | Panel | | 04/04/2023 14:58 | 04/04/2023 15:00 | | Discharge, Emergency Department Admissio Emergency Departme Discharge, Behavioral Admission, Behaviora Discharge, Hospital | n, nt Health I Health | Successful | | Ł | (khie_SIT_TEST_01@mailinato |
| Jackson Milley 8/17/2016 F 254 WALLER BRANCH RD LOUISA KY 41230 Success | | В | | С | D | E | | F | G | Н | | 1 | J |
| Jackson Milley 8/17/2016 F 254 WALLER BRANCH RD LOUISA KY 41230 Success | 1 | Patient Last | Name | Patient First Name | Patient DOB(MM/DD/YY | YY) Patient Sex | Patient | Street Address | Patient | t City Patient State | Patie | nt Zipcode | Status |
| Jane Danyal 6/21/1985 M PO Box 131 Danville KY 40484 Success | | Jackson | | Milley | 8/17/2016 | F | 254 WA | LLER BRANCH RD | LOUIS | А КҮ | 4123 | 0 | Success |
| 3 | 3 | Jane | | Danyal | 6/21/1985 | М | PO Box : | 131 | Danvill | e KY | 4048 | 4 | Success |



- If some of the patient(s) listed on the Patient Panel file were not successfully processed (i.e. *Partially Successful*), the file displays the following values:
 - The *Success* status displays for the patient(s) that were processed successfully. The *Error* status displays for the patient(s) that were <u>not</u> processed.
 - The **error description** displays to clarify the reason why the patient(s) were <u>not</u> processed successfully.

| ACTION \$ | FILE NAME + | DATE UPLOADED 🗘 | DATE PROCESSED \$ | EVENT NOTIFICATIONS + | STATUS + | DOWNLOAD RESPONSE | USER + |
|--------------|--|------------------|-------------------|--|----------------------|----------------------|---|
| Add Patients | Event Notification Patient Panel Upload_Add Patients 1.csv | 04/04/2023 14:58 | 04/04/2023 15:00 | Hospital Admission, Hospital Discharge, Emergency Department Admission, Emergency Department Discharge, Behavioral Health Admission, Behavioral Health Discharge, Hospital Readmission (other facility) | Partially Successful | Ł | SIT Test_1 (khie_SIT_TEST_01@mailinato r.com) |

| 1 | В | C | D | E | F | G | Н | 1 | J | K |
|---|-------------------|--------------------|-------------------------|-------------|------------------------|--------------|---------------|-----------------|---------|---|
| 1 | Patient Last Name | Patient First Name | Patient DOB(MM/DD/YYYY) | Patient Sex | Patient Street Address | Patient City | Patient State | Patient Zipcode | Status | Error_Description |
| 2 | Jackson | Milley | 8/17/2016 | F | 254 WALLER BRANCH RD | LOUISA | КҮ | 41230 | Success | |
| 3 | Jane | Danyal | 6/21/1985 | м | PO Box 131 | Danville | KY | 40484 | Error | Invalid KOG email or association not found with Organization |

5 Technical Support

ePartnerViewer Support Tab

To seek assistance or log issues, you can use the **Support Tab** located in the blue navigation bar at the top of the screen in the ePartnerViewer.



Toll-Free Telephone Support

For questions and assistance regarding the ePartnerViewer, please call 1 (800) 633-6283.

Email Support

To submit questions or request support regarding the ePartnerViewer, please email <u>KHIESupport@ky.gov</u>.