



# Kentucky Health Information Exchange (KHIE)

## **ePartnerViewer Enhancements**

### User Guide

July 2021

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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.

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## Document Control Information

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## 1 Introduction

### Overview of Changes

As part of KHIE's ongoing updates and maintenance, additional features and functionality have been developed to enhance the end-user experience and improve upon KHIE's quick and easy-to-use portal.

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 of the ePartnerViewer.

### **The new features include:**

1. *myDASHBOARD* Updates
2. Announcements & Advisories
3. Patient Summary Updates:
  - a. Cumulative Laboratory
  - b. Advance Directive Portlet
  - c. Sensitive Data Portlet
4. Support Tool
5. Document Export and Print
6. Event Notification Functionality Updates:
  - a. Recent Notifications
  - b. Deleted Notifications
  - c. Bulk Patient Upload

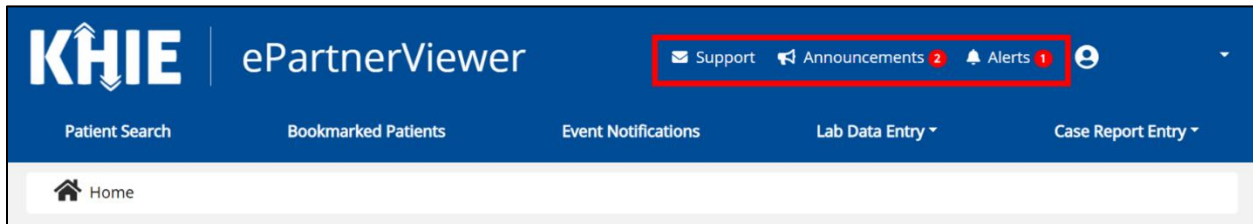
**Please Note:** This guide assumes a baseline understanding of KHIE's web-based portal the ePartnerViewer. For basic step-by-step guidance, review the [ePartnerViewer User Guide](https://khie.ky.gov/Pages/index.aspx) on <https://khie.ky.gov/Pages/index.aspx> or in the KHIE Coach subsection in the Resources Tab




## 2 myDASHBOARD Updates

The latest release of new functionality in the ePartnerViewer has resulted in significant updates to myDASHBOARD. You will notice several key changes detailed in this section.

### New myDASHBOARD Icons

There are three (3) new icons in the Blue Navigation Bar: Support icon, Announcements icon, and the Advisories icon.



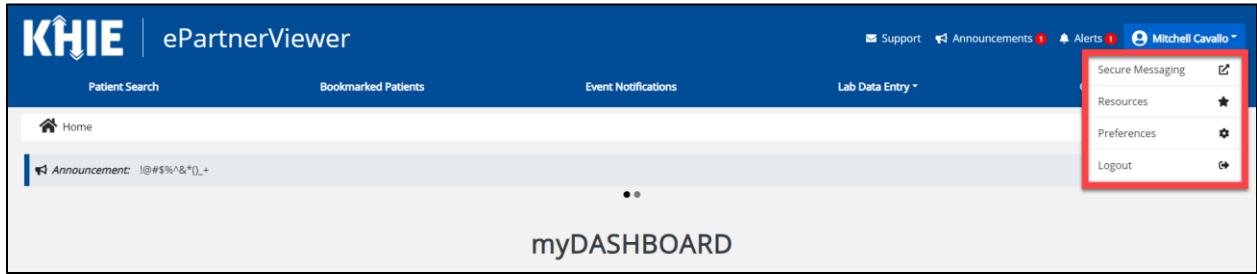
Name	Icon
Support	
Announcements	
Advisories	

### User Profile Icon Updates

The User Profile has been updated to include additional dropdown options. The Secure Messaging Tab has been moved from the *Blue Navigation Bar* to the *User Profile* dropdown.

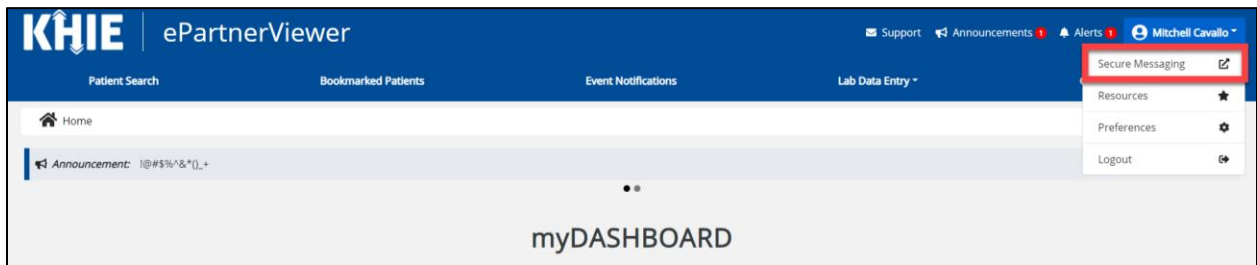
The new dropdown options include:

- Secure Messaging
- Resources
- Preferences
- Logout



### Secure Messaging

1. Click **Secure Messaging** to navigate to the CareAlign login page.

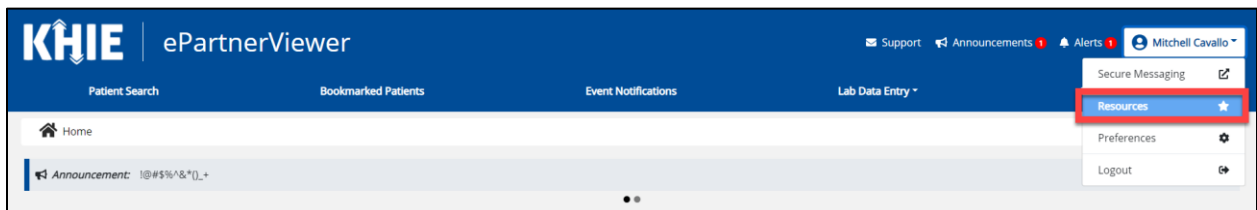


2. The **CareAlign login page** displays.



### Resources

1. Click **Resources** to open the Resources page.



2. The **Resources page** displays.

## RESOURCES

<div style="background-color: #333; color: white; padding: 5px; text-align: center; font-weight: bold; margin-bottom: 5px;">DIRECTORIES</div> <ul style="list-style-type: none"> <li style="padding: 2px 5px;"><a href="#">KHIE Participant Directory</a></li> <li style="padding: 2px 5px;"><a href="#">DSM Directory</a></li> <li style="padding: 2px 5px;"><a href="#">NPI Registry</a></li> <li style="padding: 2px 5px;"><a href="#">LOINC</a></li> </ul>	<div style="background-color: #333; color: white; padding: 5px; text-align: center; font-weight: bold; margin-bottom: 5px;">THE KHIE COACH</div> <ul style="list-style-type: none"> <li style="padding: 2px 5px;"><a href="#">KOG Guides</a></li> <li style="padding: 2px 5px;"><a href="#">ePartnerViewer Training Guide</a></li> <li style="padding: 2px 5px;"><a href="#">Training Video</a></li> </ul>
<div style="background-color: #333; color: white; padding: 5px; text-align: center; font-weight: bold; margin-bottom: 5px;">THE NEWS EXCHANGE</div> <ul style="list-style-type: none"> <li style="padding: 2px 5px;"><a href="#">KHIE News</a></li> <li style="padding: 2px 5px;"><a href="#">Training Video</a></li> </ul>	<div style="background-color: #333; color: white; padding: 5px; text-align: center; font-weight: bold; margin-bottom: 5px;">REFERENCE GUIDE</div> <ul style="list-style-type: none"> <li style="padding: 2px 5px;"><a href="#">Frequently Asked Questions</a></li> <li style="padding: 2px 5px;"><a href="#">Event Notification Types</a></li> <li style="padding: 2px 5px;"><a href="#">Tests Under Communicable Disease</a></li> </ul>

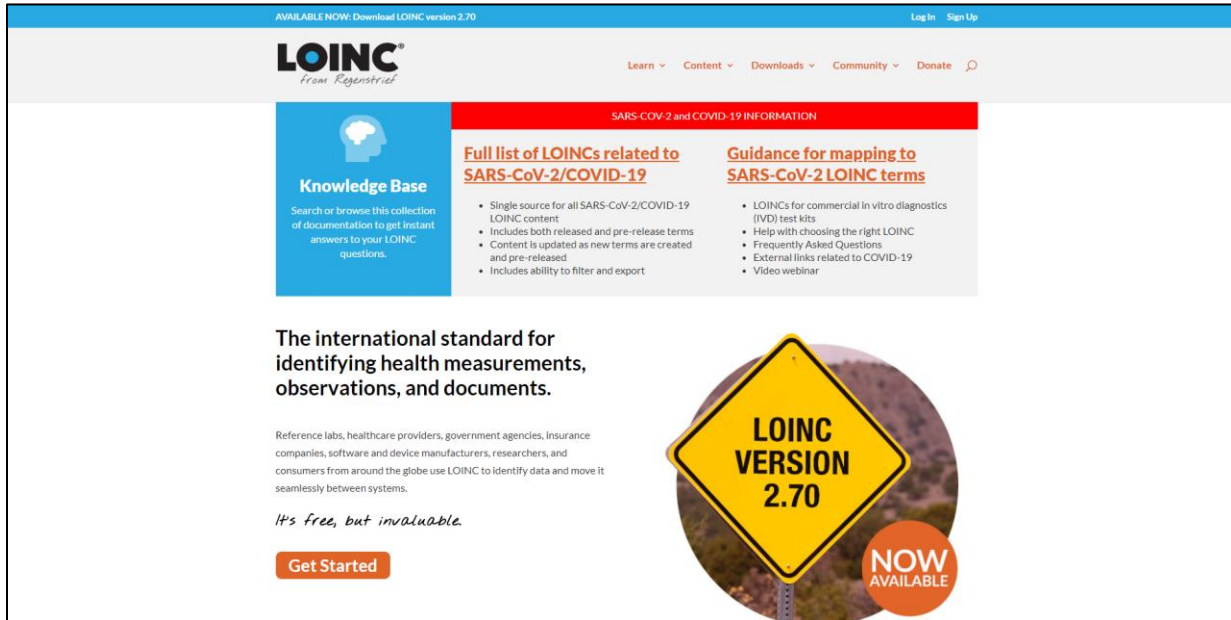
The **Resources** page contains the following four (4) categories of resources that will display when there is information available to view:

- **Directories:** Includes links to useful Directories such as:
  - KHIE Participant Directory
  - Direct Secure Messaging (DSM) Directory of Direct Secure Email Addresses
  - National Provider Identifier (NPI) Registry
  - Logical Observation Identifiers Names and Codes (LOINC)
- **The News Exchange:** Platform to share KHIE-related news and updates
- **The KHIE Coach:** Educational materials to assist with system navigation and usage such as:
  - Training Guides
  - Training Videos
  - Informational Materials
- **Reference Guide:** Provides guidance on specific content, such as:
  - Frequently Asked Questions
  - Event Notification Types
  - Information related to Communicable Disease Reporting

**Please Note:** Each category will only display when there is information available to view. For example, the *Directories* category will display when there are links to useful directories available or the *KHIE Coach* category will display when there are teaching guides or videos

3. Click on any link to open a Resource; for, example, click on the link **LOINC** to open the official list of LOINC codes.



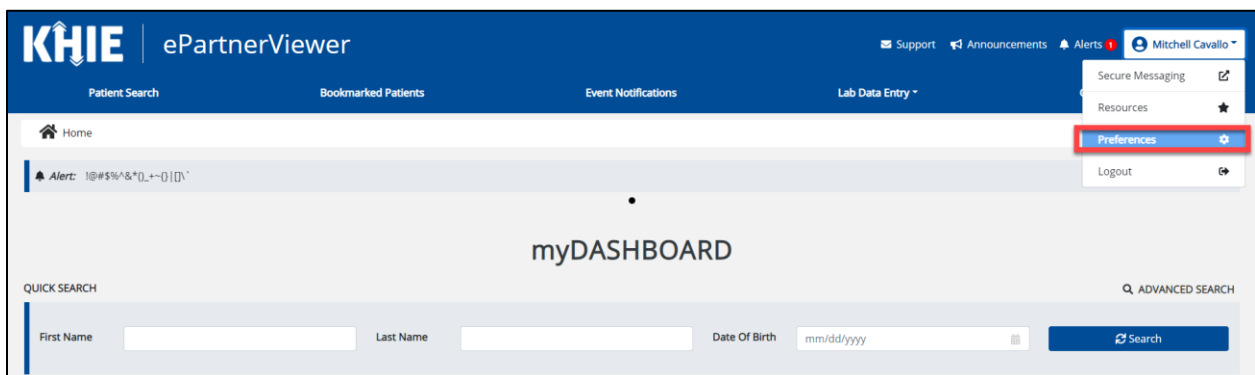


**Please Note:** Clicking associated links will open a new browser tab in your web browser. Click the KHIE Portal tab at the top of your web browser to navigate back to the ePartnerViewer.

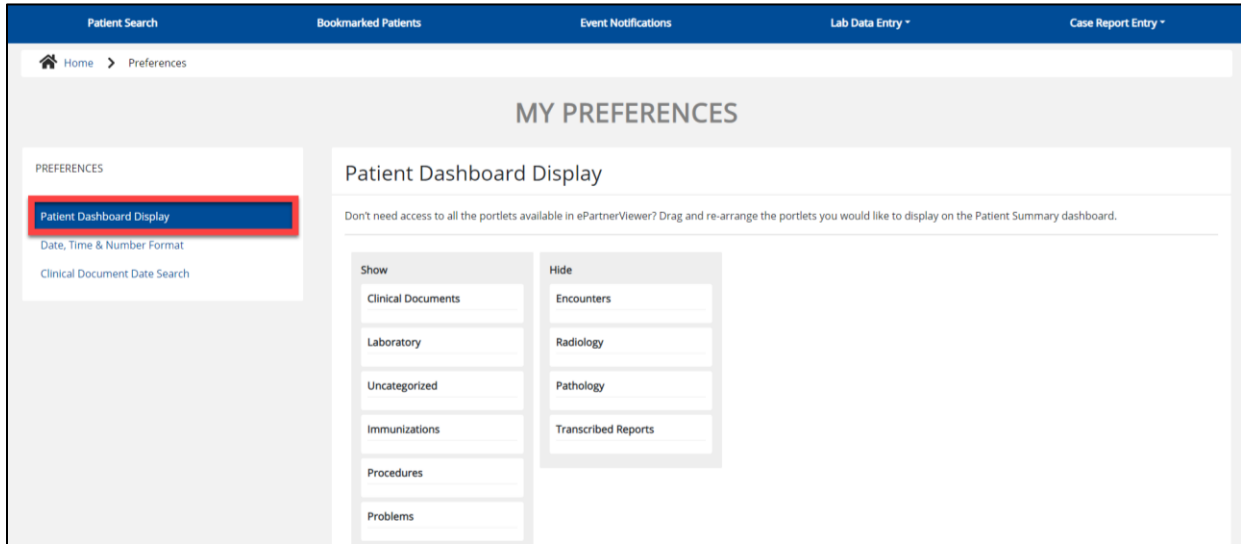
## Preferences

*My Preferences* has been updated to make it easier to arrange and hide or show portlets on the Patient Summary. You can arrange the portlets in the order you want to see them in the Patient Summary by dragging the portlets up and down; you can show or hide them by dragging and dropping them from the *Show column* to the *Hide column* and vice-versa.

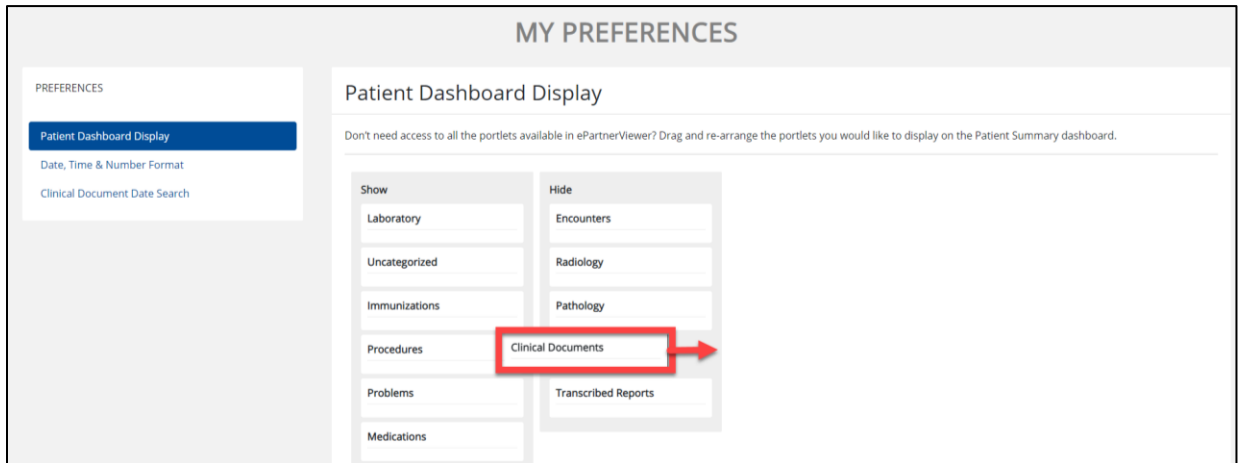
1. From your *User Profile* dropdown, click **Preferences** to open **My Preferences**.



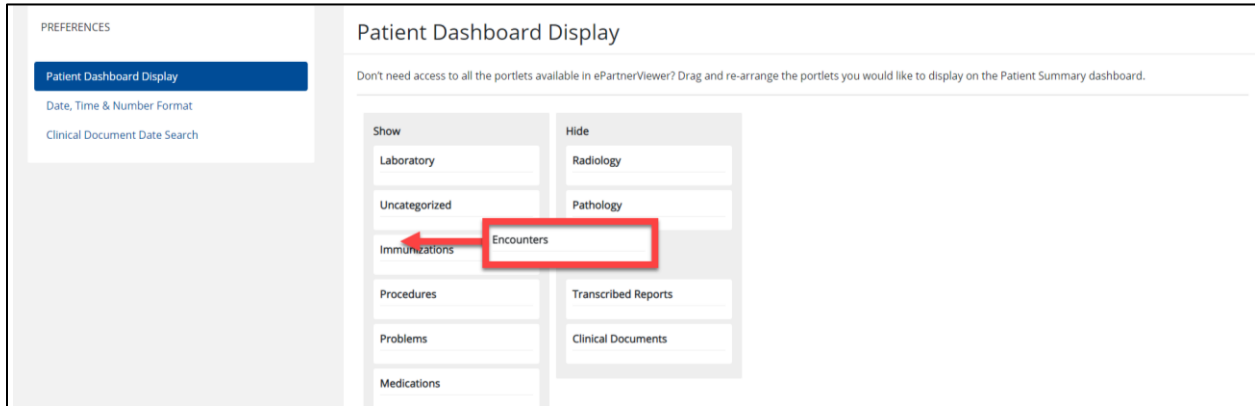
2. On the left side, under *Preferences*, select **Patient Dashboard Display**.



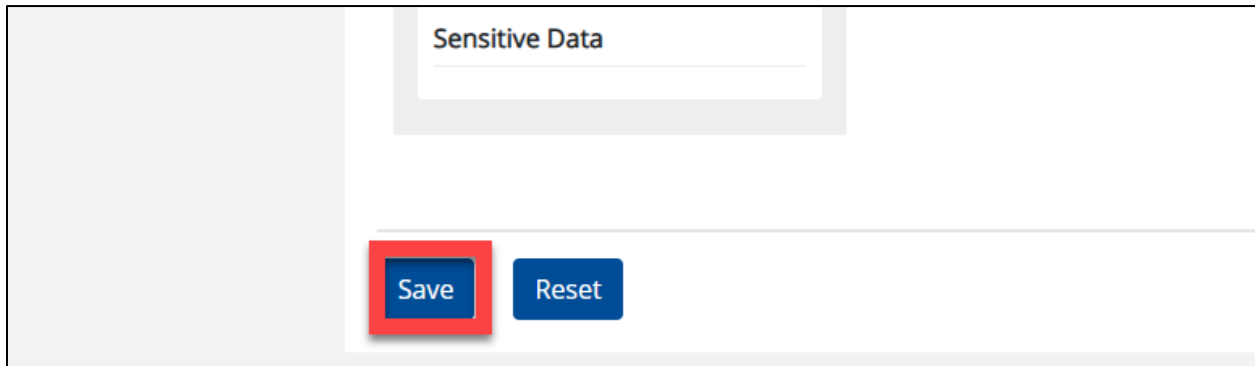
3. To hide a portlet, click the **Portlet Name** from the *Show* column and **drag it** to the *Hide* column.



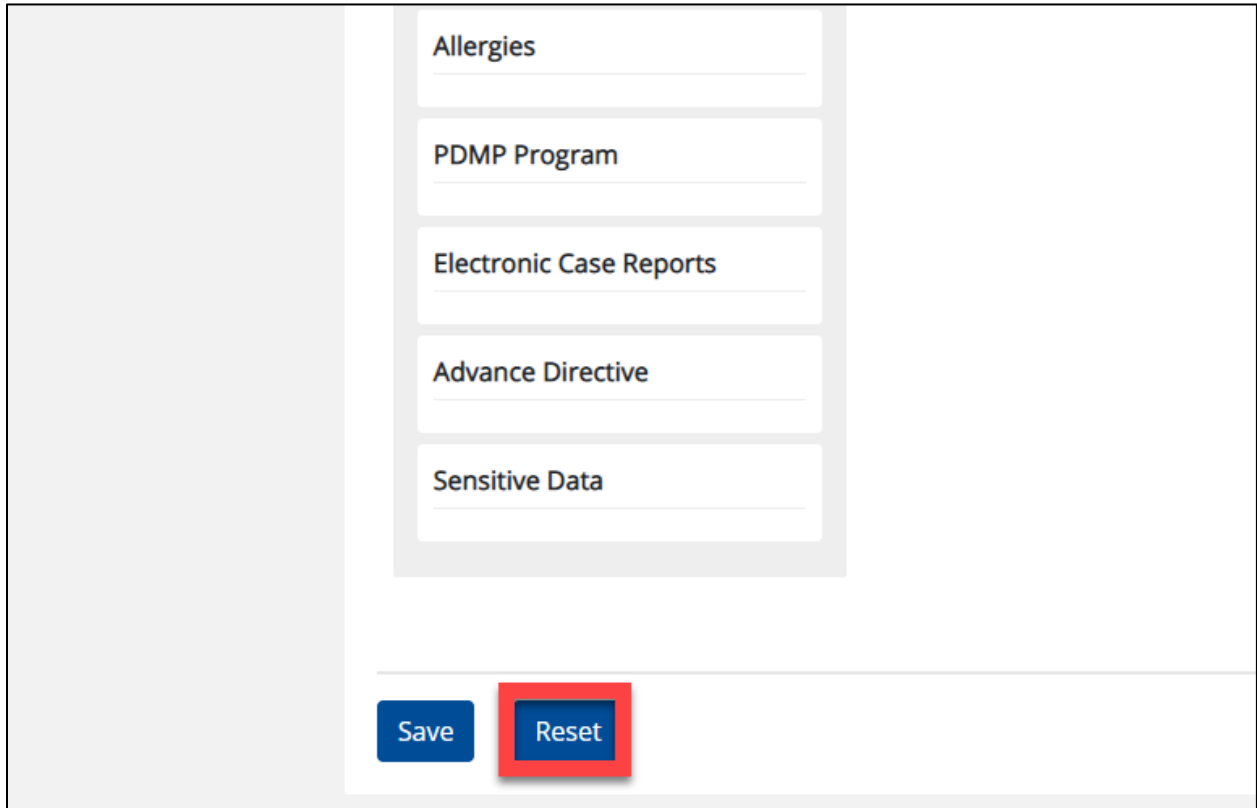
4. To show a portlet, **click** the **Portlet Name** from the *Hide* column and **drag it** to the *Show* column.



5. Click **Save** to save your changes.



6. Click **Reset** to return to the default setting.



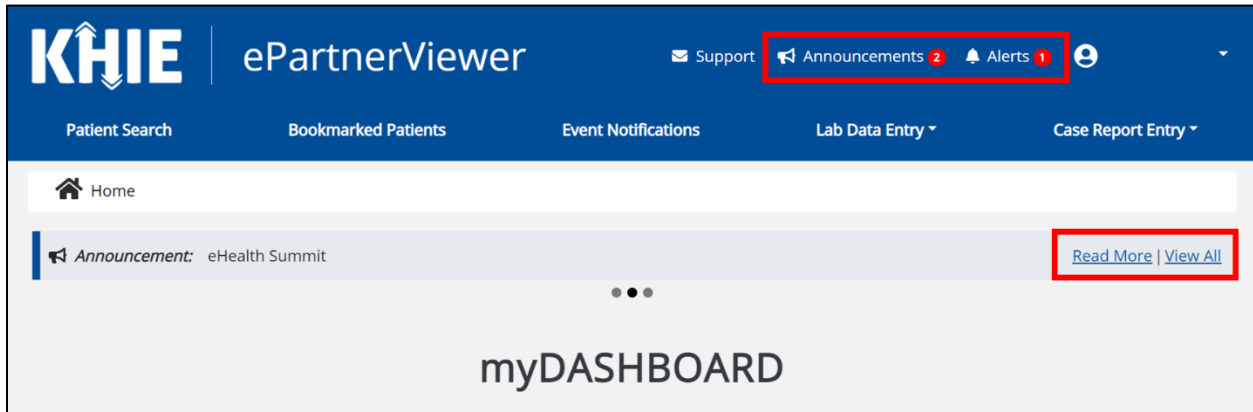
The screenshot displays a vertical list of five input fields, each with a label and a horizontal line for text entry. The labels are: Allergies, PDMP Program, Electronic Case Reports, Advance Directive, and Sensitive Data. Below this list, there are two buttons: a blue 'Save' button and a blue 'Reset' button. The 'Reset' button is highlighted with a red square border.

### 3 Announcements & Advisories

#### Announcements on myDASHBOARD

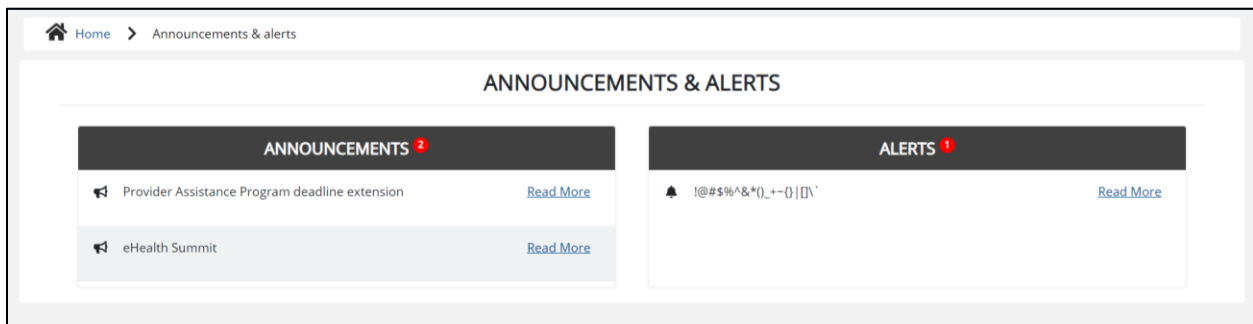
Find out what’s happening at KHIE! *myDASHBOARD* now displays pertinent announcements and advisories, a feature that is intended to keep you ‘in the know’.

1. There are two options to view **Announcements & Advisories**:
  - Click the **Announcements Icon** or **Advisories Icon** in the *Blue Navigation Bar* at the top right of **myDASHBOARD** screen.
  - **OR** click **Read More/View All** to the right of an *Announcement* or an *Advisory* displaying in the banner on the **myDASHBOARD** screen.

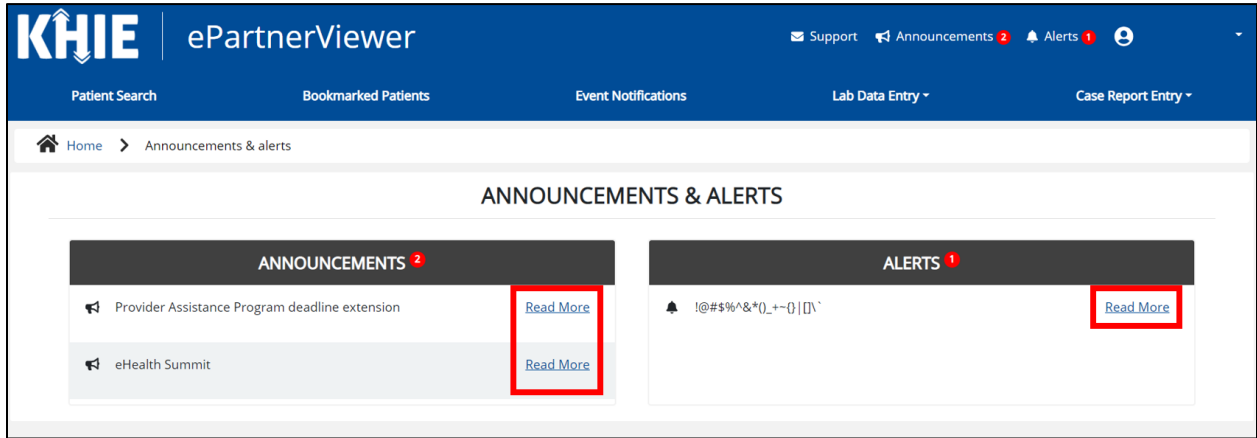


**Please Note:** Every five (5) seconds, the display alternates between the two (2) most recent announcements and advisories.

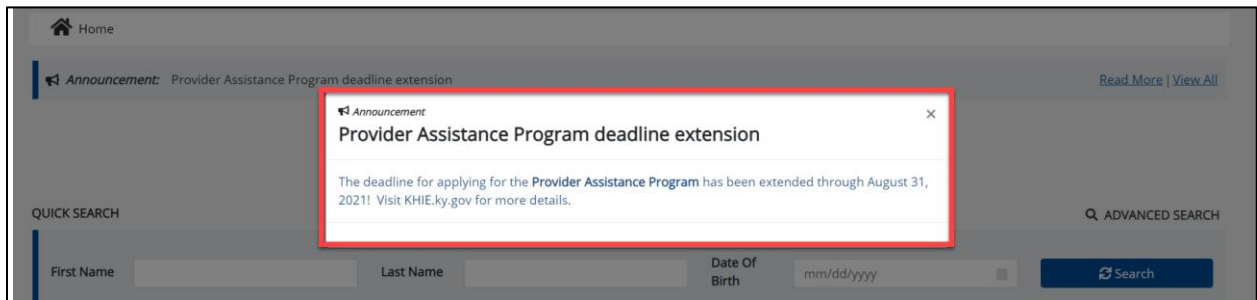
2. The **Announcements & Advisories** page displays.



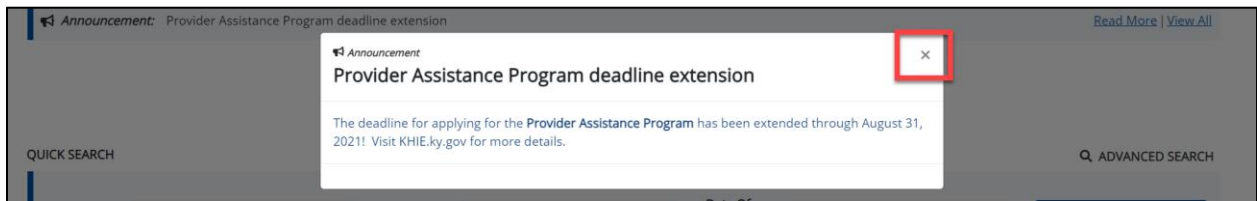
- 3. To view the details of an Announcement or an Advisory, click **Read More** to the right of the *Announcement or Advisory*.



- 4. The **Detailed Announcement Pop-Up** or **Detailed Advisory Pop-Up** displays.



- 5. Click the **X** at the top right to close the pop-up.

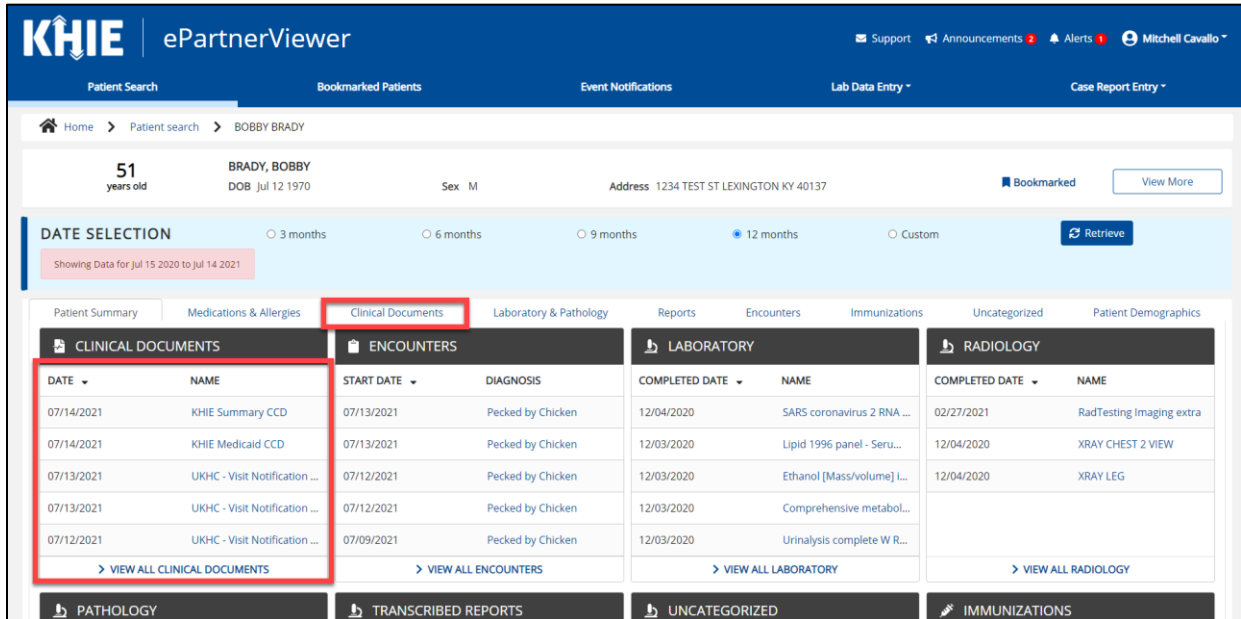


## 4 Document Exporting and Printing

ePartnerViewer users can export and/or print any document from the **Clinical Documents** Portlet or Tab.

### Exporting a Document

1. While in the patient chart, open any document from the **Clinical Documents** Portlet or Tab.



**Please Note:** All Patient Documents can be exported, but to do so, you must open the desired document from the Clinical Documents Portlet or Clinical Documents Tab.

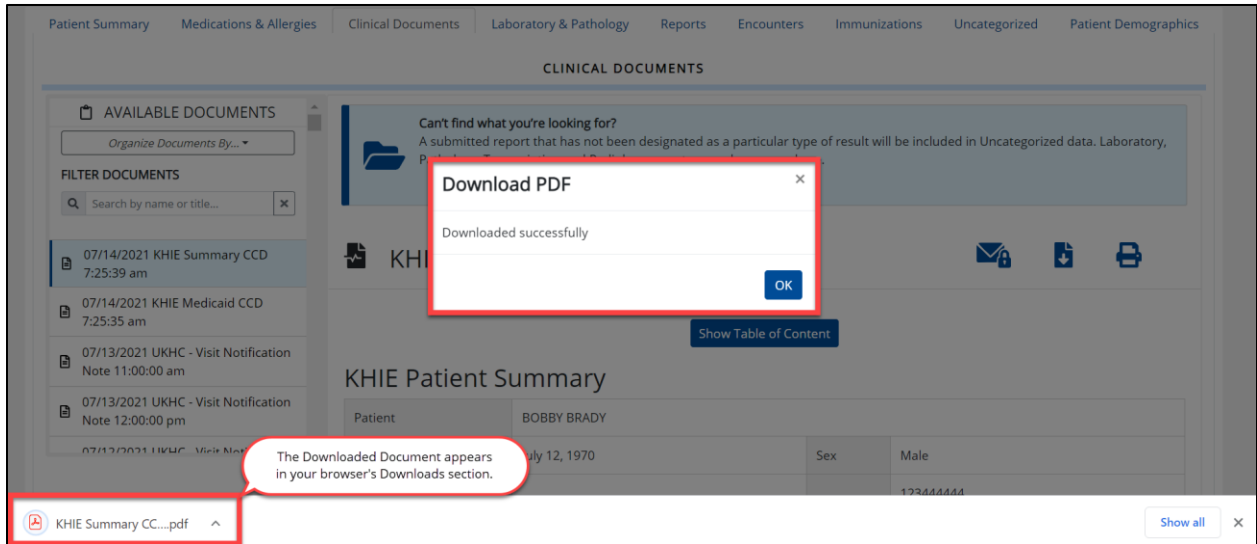
2. Click the **Export PDF icon** located on the right side of the document.





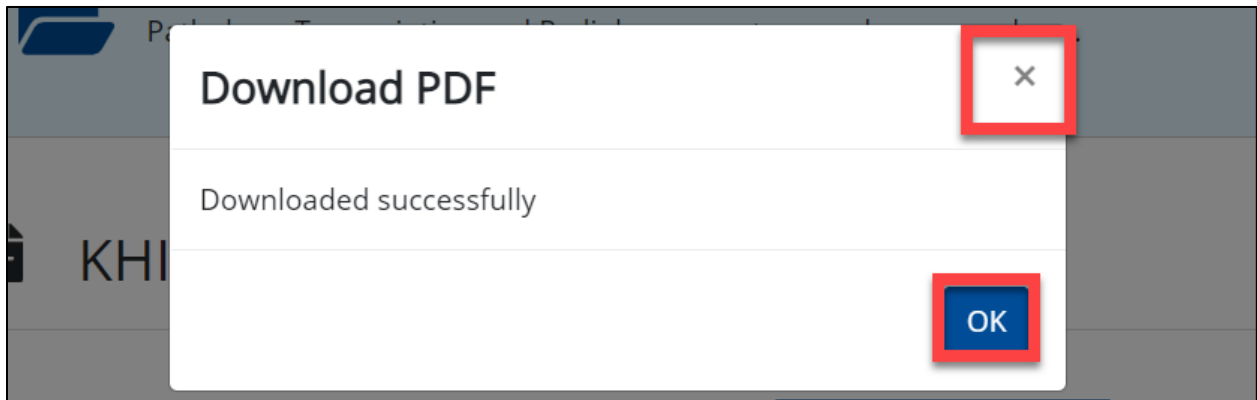


- 3. The **Download PDF pop-up** displays and begins downloading the PDF. Once the download is complete, the pop-up displays to show that the document has been *Downloaded Successfully*.



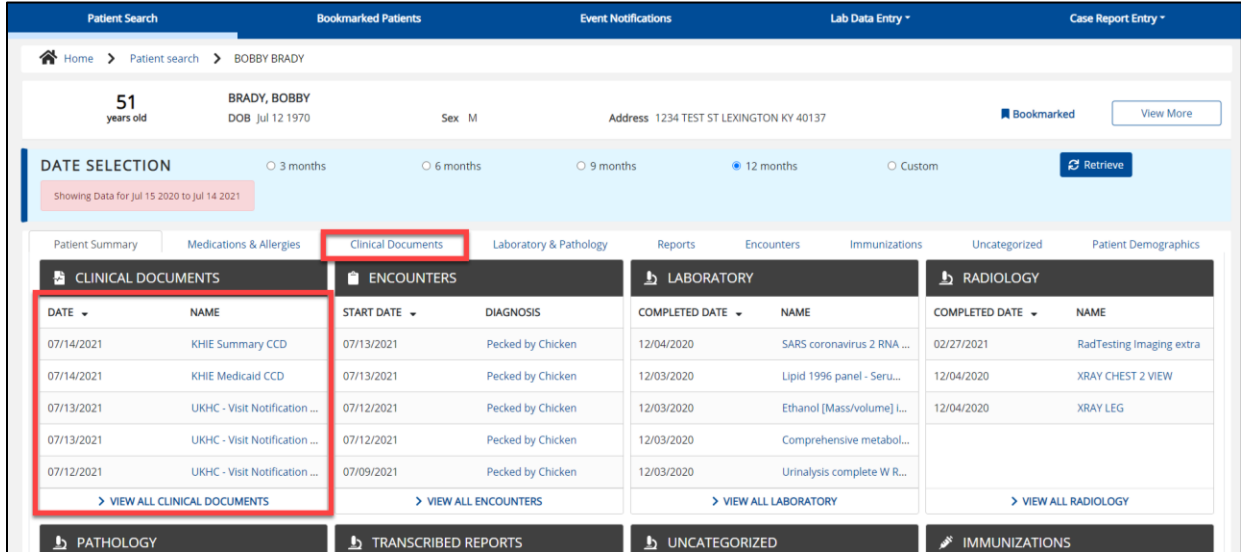
**Please Note:** The PDF file appears in your browser's Downloads section.

- 4. After the download is complete, click **OK** to exit. To cancel the request to download, Click **X** at the top right.



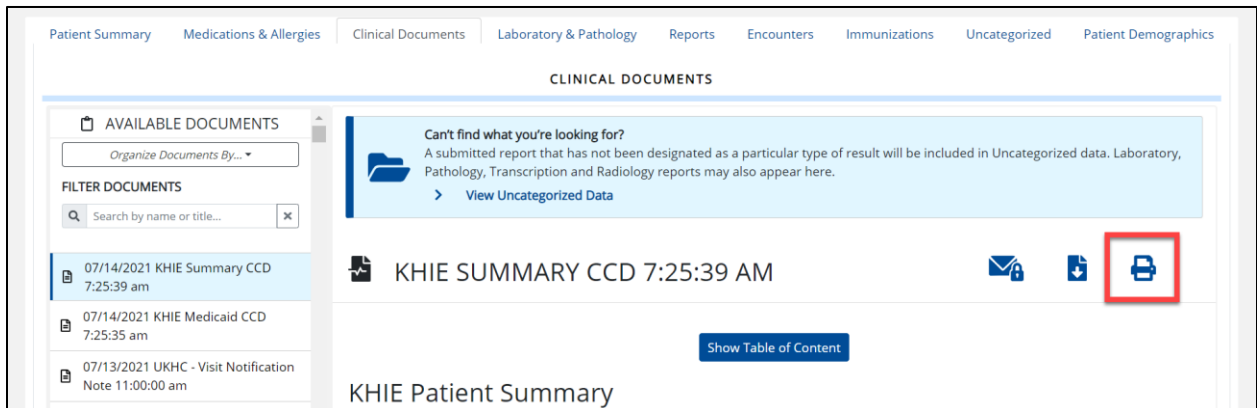
### Printing a Document

1. While in the patient chart, open any document from the **Clinical Documents** Portlet or Tab.

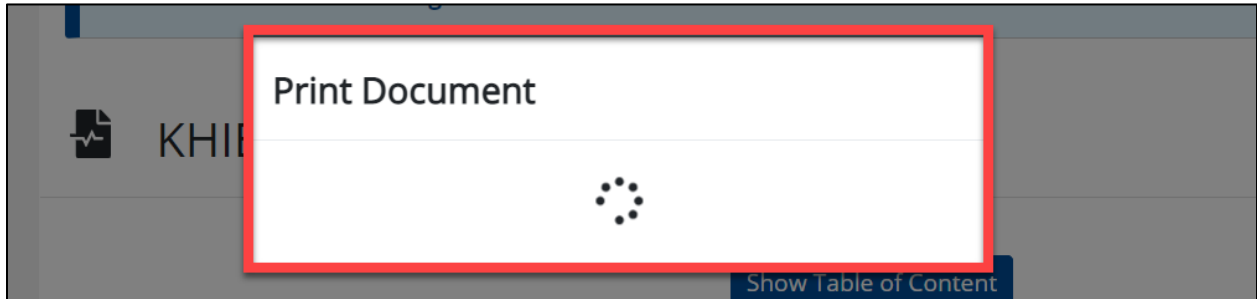


**Please Note:** All Patient Documents can be printed, but to do so, you must open the desired document from within the Clinical Documents Portlet or Clinical Documents Tab.

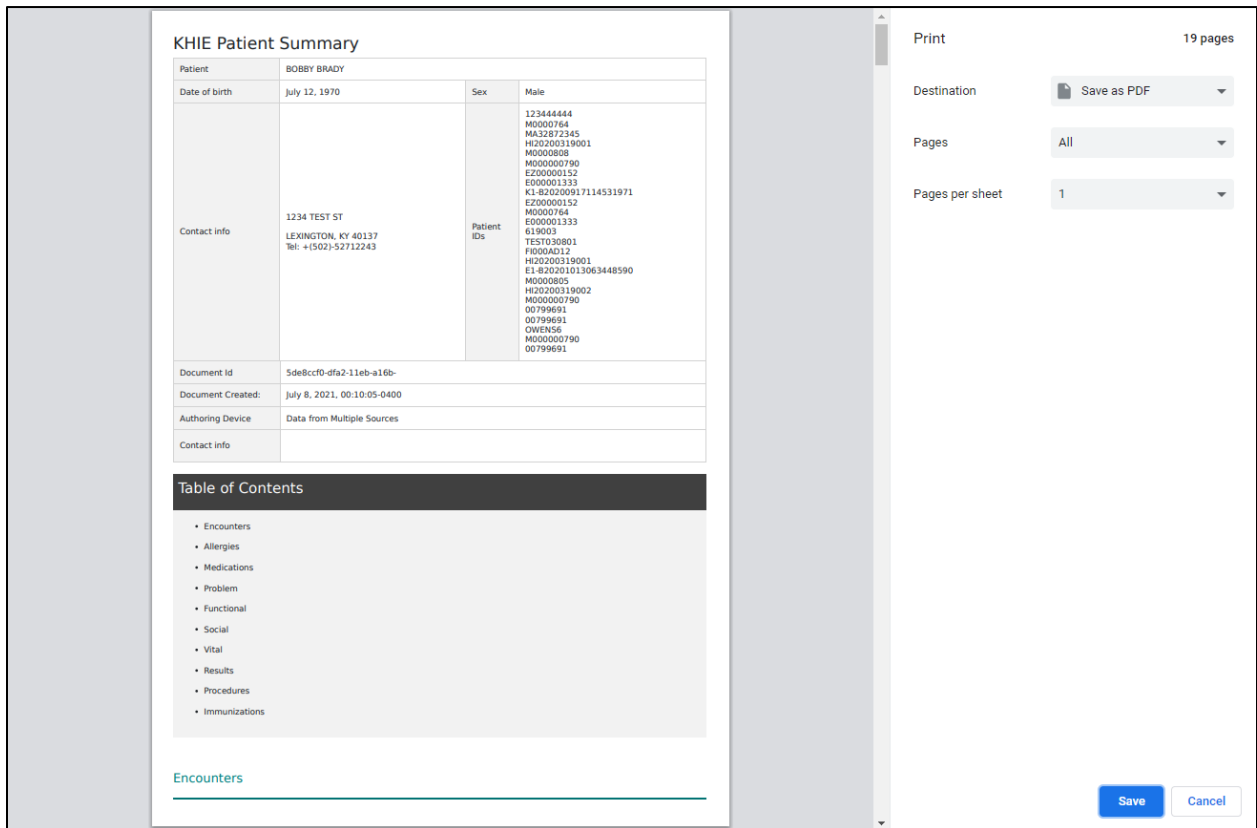
2. Click the **Print icon** located on the right side of the document.



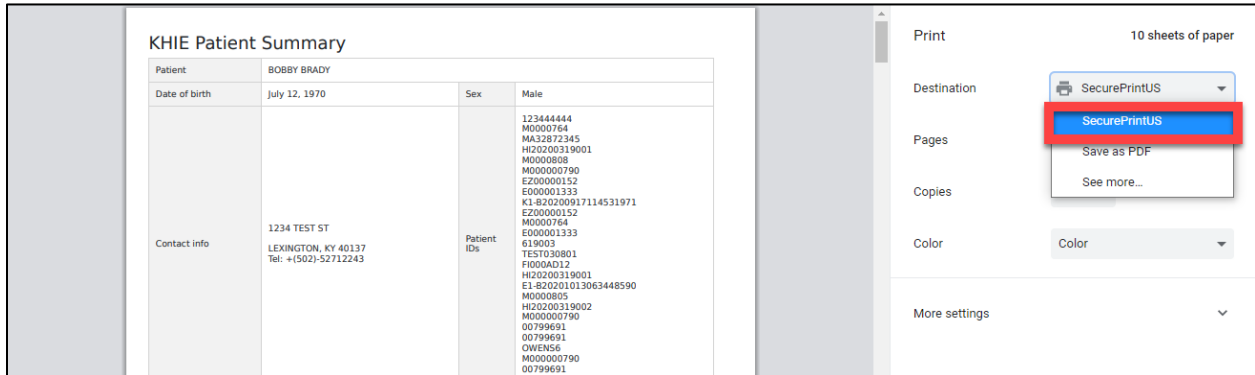
3. The **Print Document pop-up** displays and begins loading the document.



4. Once the document downloads, the **Print page** displays.



5. Select a **Print Destination** from the destination dropdown.



6. Click **Print** to print the document. To cancel the request to print, click **Cancel**.



## 5 Patient Chart Updates

### Advance Directives

Advance health care directives (Advance Directives) enable people to make their treatment decisions known, in the event they become incapacitated. These legal documents allow patients to inform Providers of future medical care decisions. Advance Directives become effective when a patient is no longer able to articulate medical conditions for themselves, e.g. coma or terminal state.

Advance Directive documents are available in the *Advance Directives Portlet* in the Patient Summary. Up to five (5) of the patient’s most recent Advance Directive documents will be displayed in the Portlet. Users can click *View All Advance Directive* to see all Advance Directives. Advance Directives are also available in Clinical Documents.

<p><b>PROCEDURES</b></p> <table border="1"> <thead> <tr> <th>DATE ▾</th> <th>NAME</th> </tr> </thead> <tbody> <tr> <td>12/08/2020</td> <td>AppendectomyApp...</td> </tr> <tr> <td>05/11/2020</td> <td>386053000</td> </tr> <tr> <td>05/11/2020</td> <td>392230005</td> </tr> <tr> <td>05/11/2020</td> <td>268400002</td> </tr> <tr> <td>05/11/2020</td> <td>268400002</td> </tr> </tbody> </table> <p><a href="#">&gt; VIEW ALL PROCEDURES</a></p>	DATE ▾	NAME	12/08/2020	AppendectomyApp...	05/11/2020	386053000	05/11/2020	392230005	05/11/2020	268400002	05/11/2020	268400002	<p><b>PROBLEMS</b></p> <table border="1"> <thead> <tr> <th>DATE ▾</th> <th>NAME</th> </tr> </thead> <tbody> <tr> <td></td> <td>Infection of ear</td> </tr> <tr> <td></td> <td>Problem</td> </tr> </tbody> </table> <p><a href="#">&gt; VIEW ALL PROBLEMS</a></p>	DATE ▾	NAME		Infection of ear		Problem	<p><b>MEDICATIONS</b></p> <table border="1"> <thead> <tr> <th>NAME</th> </tr> </thead> <tbody> <tr> <td>Insulin Glargine,Hum.rec.anlog (Lantus Solos...</td> </tr> <tr> <td>Metoprolol Succinate</td> </tr> <tr> <td>Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus...</td> </tr> <tr> <td>Atorvastatin Calcium (Lipitor 10mg Tab) 10 M...</td> </tr> <tr> <td>Valsartan</td> </tr> </tbody> </table> <p><a href="#">&gt; VIEW ALL MEDICATIONS</a></p>	NAME	Insulin Glargine,Hum.rec.anlog (Lantus Solos...	Metoprolol Succinate	Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus...	Atorvastatin Calcium (Lipitor 10mg Tab) 10 M...	Valsartan
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<p><b>ELECTRONIC CASE REPORTS</b></p> <p>There is no data to be displayed</p>	<p><b>ADVANCE DIRECTIVE</b></p> <table border="1"> <thead> <tr> <th>DATE ▾</th> <th>NAME</th> </tr> </thead> <tbody> <tr> <td>06/12/2021</td> <td>HIPROVIDER Perso...</td> </tr> </tbody> </table> <p><a href="#">&gt; VIEW ALL ADVANCE DIRECTIVE</a></p>	DATE ▾	NAME	06/12/2021	HIPROVIDER Perso...	<p><b>SENSITIVE DATA</b></p> <table border="1"> <thead> <tr> <th>DATE ▾</th> <th>NAME</th> </tr> </thead> <tbody> <tr> <td>10/28/2020</td> <td>HIPROVIDER CFR-4...</td> </tr> <tr> <td>10/28/2020</td> <td>HIPROVIDER CFR-4...</td> </tr> </tbody> </table> <p><a href="#">&gt; VIEW ALL SENSITIVE DATA</a></p>	DATE ▾	NAME	10/28/2020	HIPROVIDER CFR-4...	10/28/2020	HIPROVIDER CFR-4...														
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**Please Note:** This may not be the patient's most recent directive. KHIE cannot ensure that all patients provide all of their healthcare providers with an advance directive. Furthermore, KHIE cannot ensure that all Participating Organizations contribute advance directives to KHIE.

1. To review an Advance Directive, click the **Document Name**.

DATE	NAME
06/12/2021	HIPROVIDER Perso...

> VIEW ALL ADVANCE DIRECTIVE

2. The **Advance Directive** Document will open on the right side. You can view the full report.

Patient	BOBBY BRADY		
Date of birth	July 12, 1970	Sex	Male
Contact info	Primary Home 1234 TEST ST LEXINGTON, KY 40137, US Tel: +12145859878	Patient IDs	20120213211501-219

3. To view other available documents, select a document from the Available Documents list on the left side.

Patient	BOBBY BRADY		
Date of birth	July 12, 1970	Sex	Male

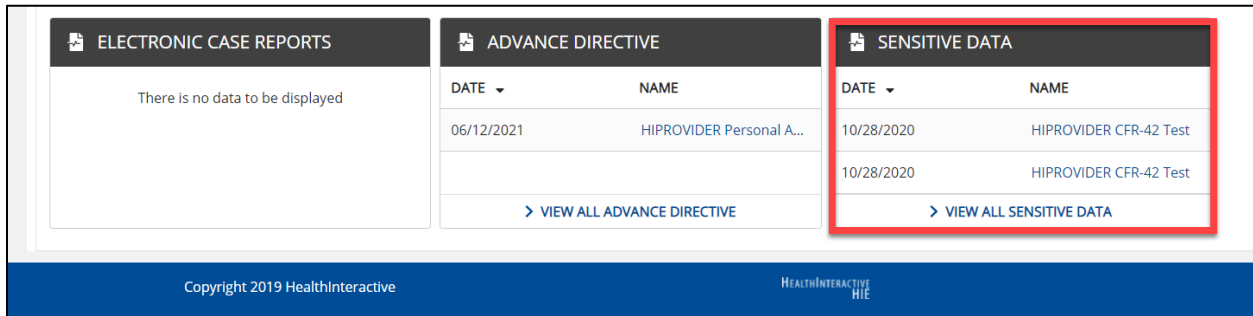
**Sensitive Data Portlet**

Behavioral health information is an integral part of a patient’s overall care. KHIE provides the platform for integration of a patient’s behavioral health information and physical health information to create a truly comprehensive health record.

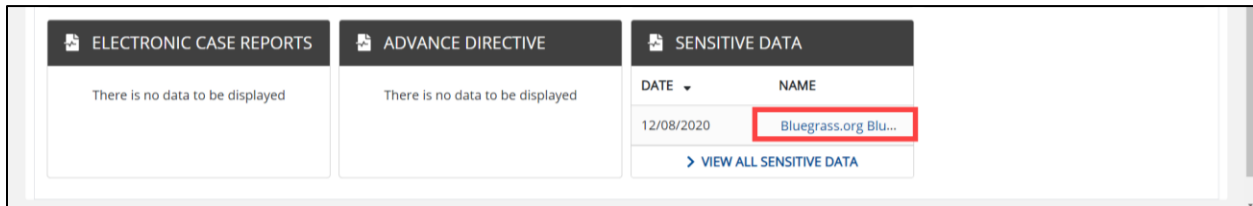
The Code of Federal Regulations (CFR), specifically 42 CFR Part 2, affords special privacy protections to a patient’s alcohol and drug abuse records.

When a KHIE Participant is a federally funded entity that provides services that include treatment for substance abuse disorders (SUDs) and subsequently falls under the Code of Federal Regulations (CFR), specifically 42 CFR Part 2, the Participant must meet the requirements of Part 2 before sharing the patient records with KHIE. To meet those requirements, the Participant must obtain patient consent to share the information in our health information exchange. KHIE must also meet requirements to ensure the appropriate non-disclosure language is included on 42 CFR Part 2 records shared with healthcare providers querying KHIE.

Sensitive Data documents can be reviewed in the *Sensitive Data Portlet* in the Patient Summary. Up to five (5) of the patient’s most recent documents will be displayed in the Portlet. Users can click *View All Sensitive Data* to see all Sensitive Data Documents. Sensitive Data documents can also be reviewed in Clinical Documents.



1. To review a Sensitive Data document, click the **Document Name**.



2. The **Sensitive Data** document will open on the right side. You can view the full report.

The screenshot shows the 'CLINICAL DOCUMENTS' section of the application. On the left, there is a sidebar with 'AVAILABLE DOCUMENTS' and a search filter. The main content area displays a document titled 'BLUEGRASS.ORG BLUEGRASSCARENAVIGATORSCCDA 5:00:16 PM'. A red box highlights a warning message: 'Summary of Patient Chart~~~~This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.'

Patient	Super Saver	Sex	Female
Date of birth	May 9, 1983	Patient IDs	BCN25380
Contact info	Work Place 1622 Baileys Point Rd Bowling Green, KY 42164, US	Document Id	63f9db65-d527-4641-9254-361501c29711

3. To view additional documents, select a document from the *Available Documents* list on the left side.

This screenshot is similar to the previous one, but the 'AVAILABLE DOCUMENTS' sidebar on the left is highlighted with a red box. The document content on the right is the same as in the previous screenshot, including the sensitive data warning and the patient information table.

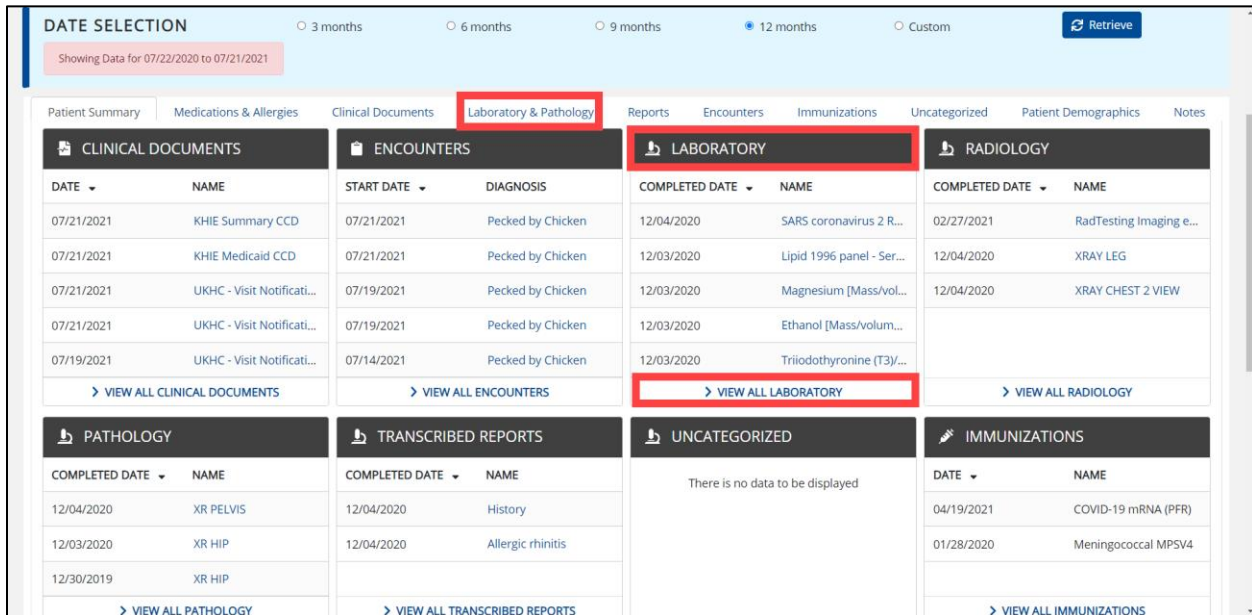
Patient	Super Saver	Sex	Female
Date of birth	May 9, 1983	Patient IDs	BCN25380
Contact info	Work Place 1622 Baileys Point Rd Bowling Green, KY 42164, US	Document Id	63f9db65-d527-4641-9254-361501c29711



### Cumulative Laboratory Records

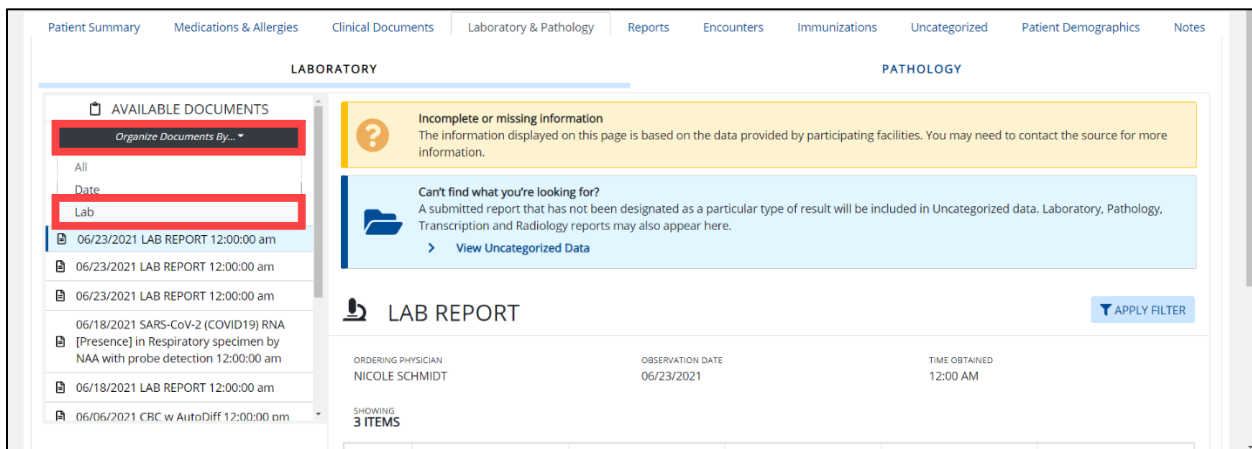
This feature allows Users to view cumulative laboratory values in a table and graph. The Cumulative Laboratory feature can be accessed from the Laboratory Portlet or from the Laboratory & Pathology Tab in the Patient Chart. Users can review the patient’s Laboratory records to see the Cumulative Laboratory feature.

1. Click the **Laboratory & Pathology Tab** or click *View All Laboratory* on the Laboratory Portlet in the Patient Summary.



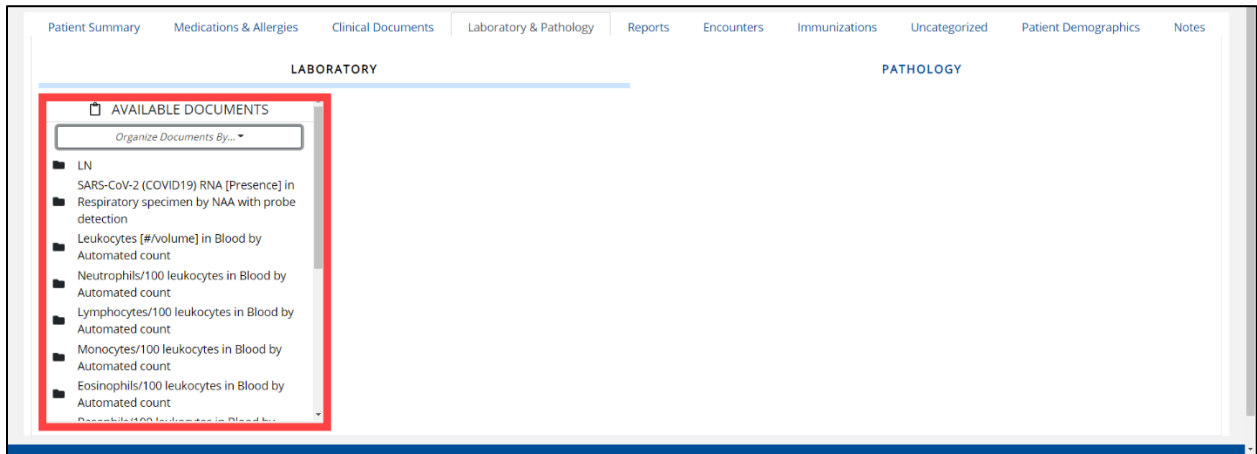
**Please Note:** The Cumulative Laboratory feature is only available for Laboratory records.

2. From the *Available Documents* on the right side, Click the **Organize Documents By** drop-down. Select **Lab** from the drop-down.

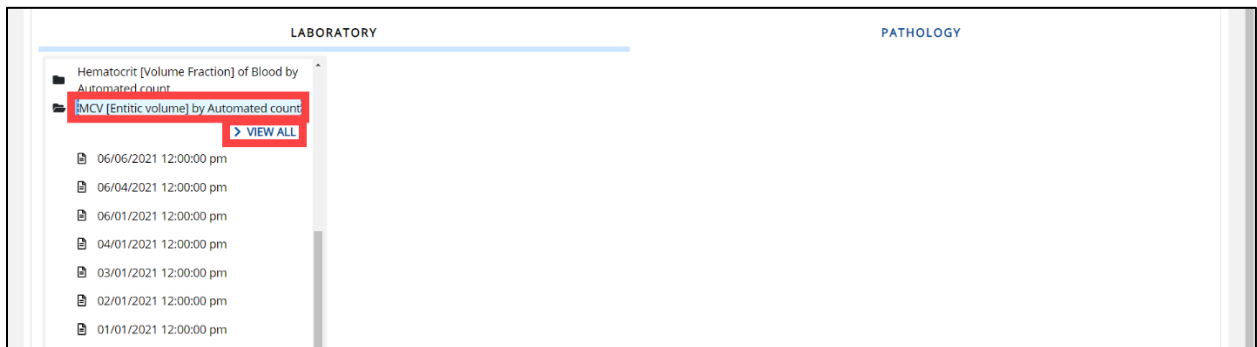




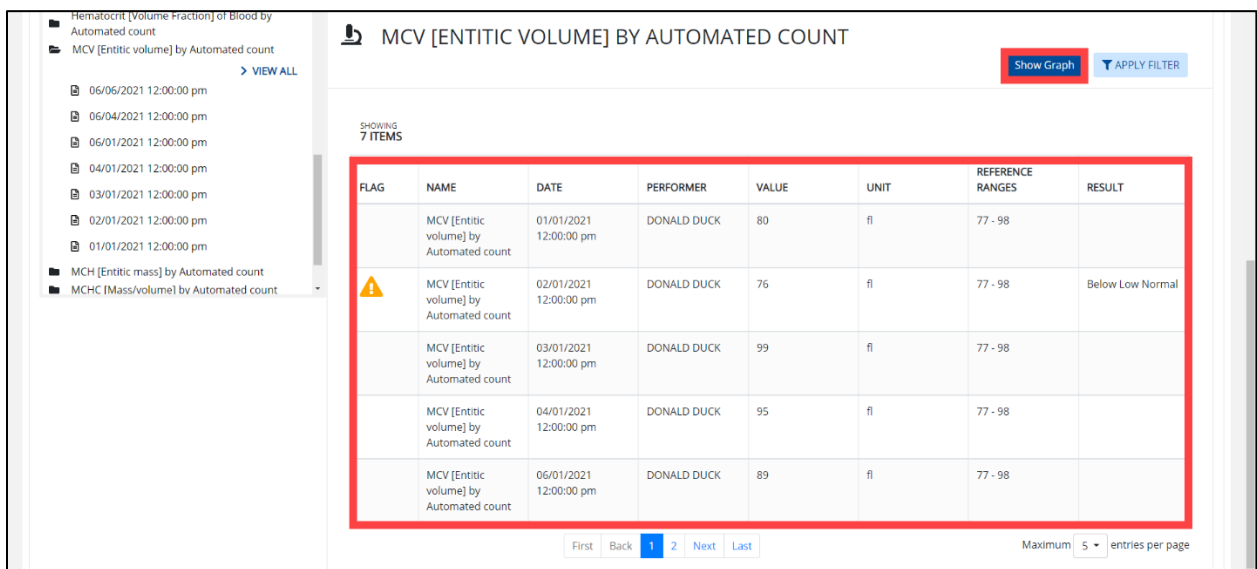
3. The **Sorted Laboratory Documents List** appears.



4. Click a **specific Laboratory record type**, then click **View All**.

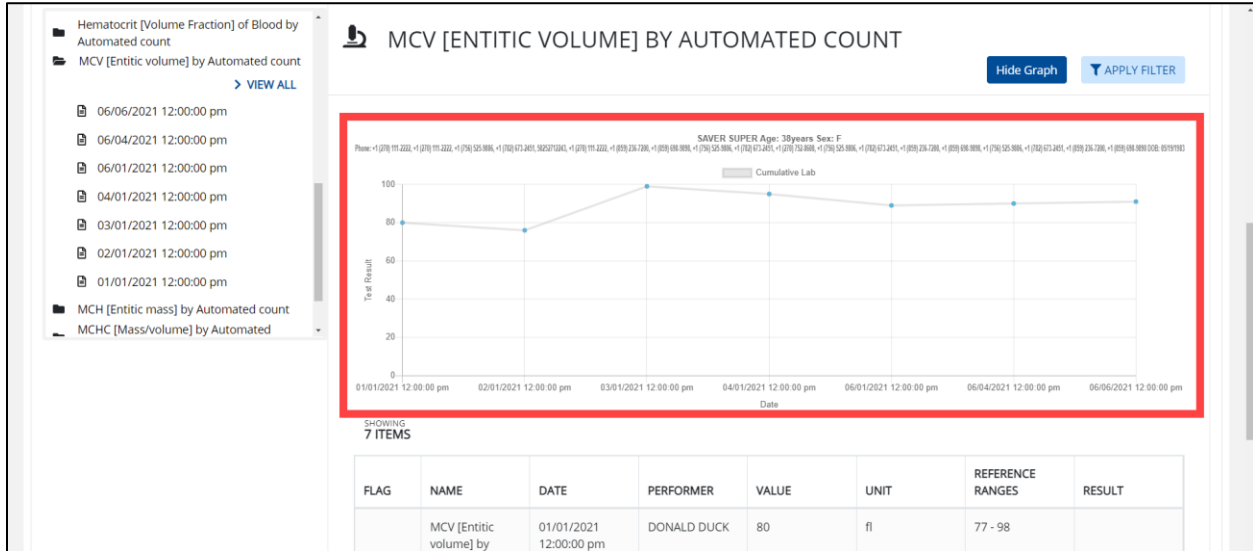


5. The Cumulative Laboratory table displays for the Laboratory type selected. To view a graph of the Cumulative Laboratory documents, click **Show Graph**.





6. The Cumulative Laboratory graph displays.

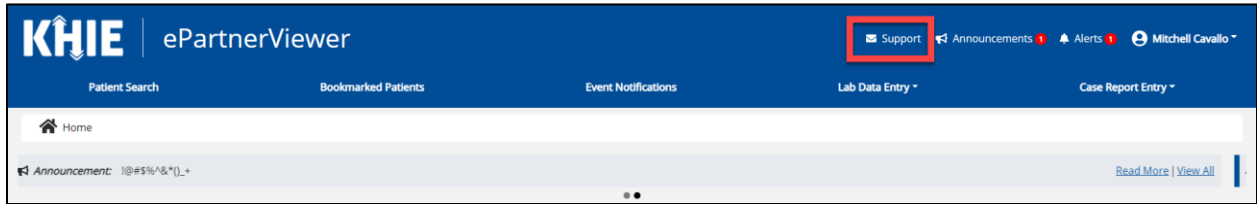


## 6 Support Email and ePartnerViewer Issue Log

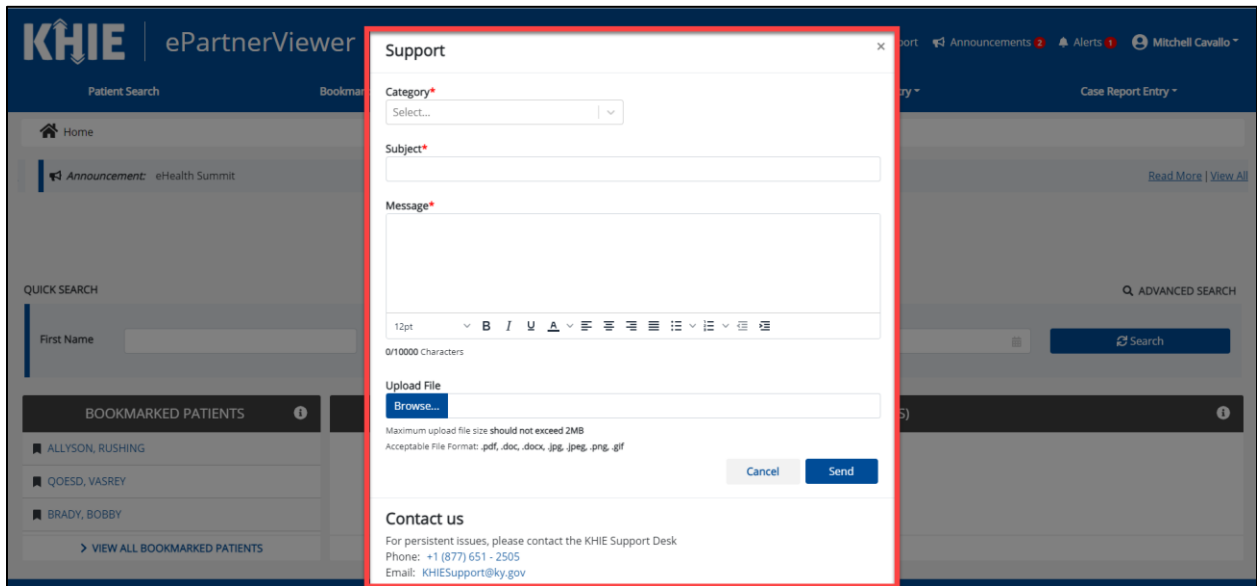
The ePartnerViewer has been updated with new support and troubleshooting tools to assist Users in the event there is an issue in the ePartnerViewer. The new Support feature allows Users to log a Support ticket and link it to a specific category. The Support Categories include:

Support Categories	
Patient Search	Encounters
Patient Demographics	Reports
Summary CCD	Patient Documents
Portlets	Technical
Medications & Allergies	Security
Laboratory & Pathology	Other

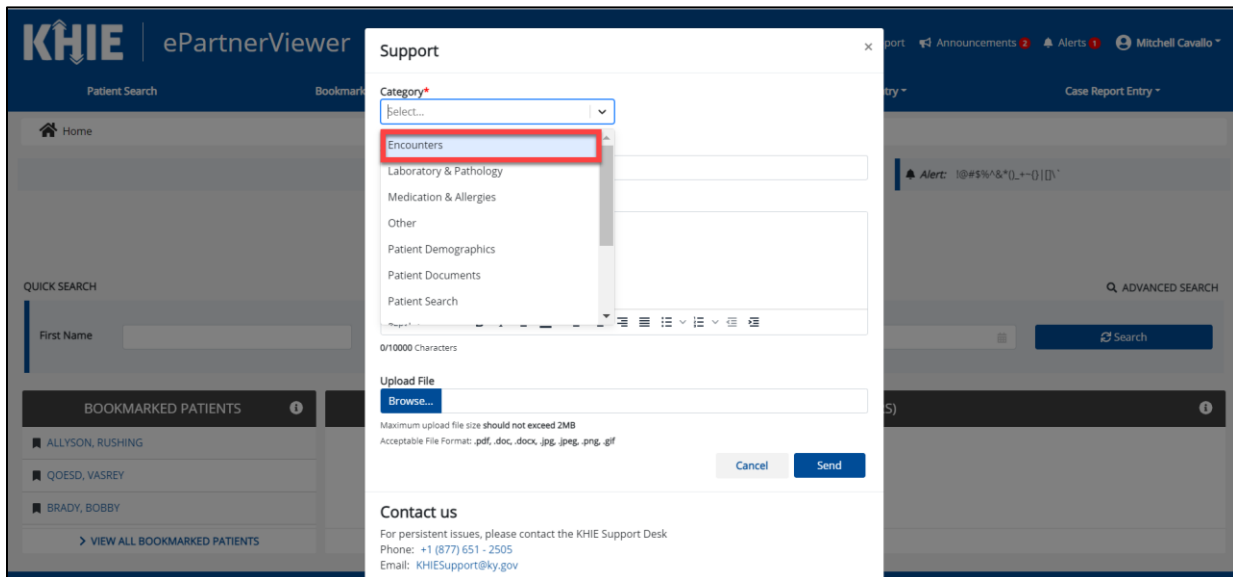
1. To log a support ticket, click the **Support Icon**.



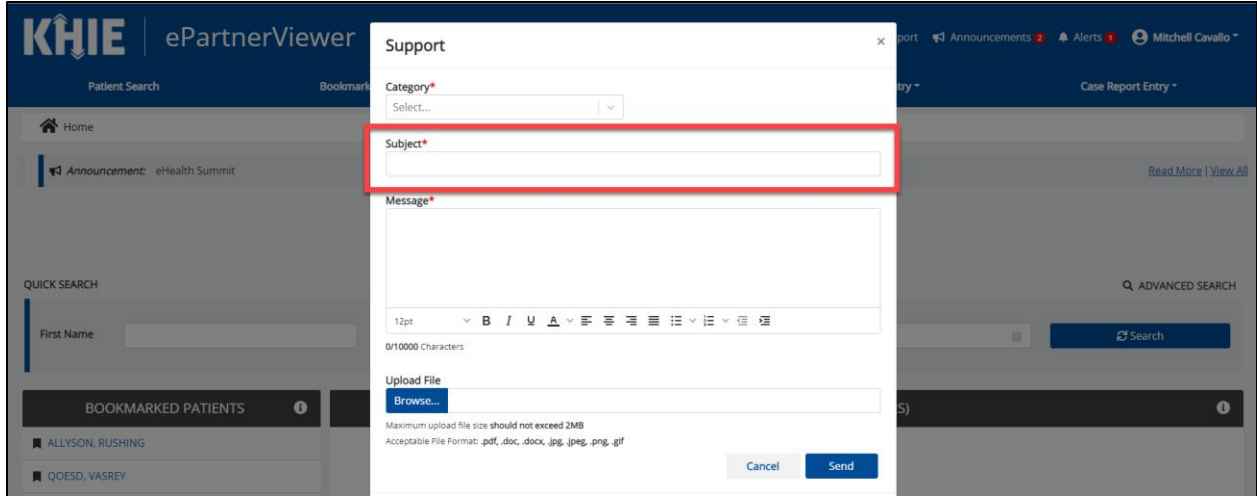
2. The **Support pop-up** displays.



3. Select a **Category** from the *Category* dropdown.



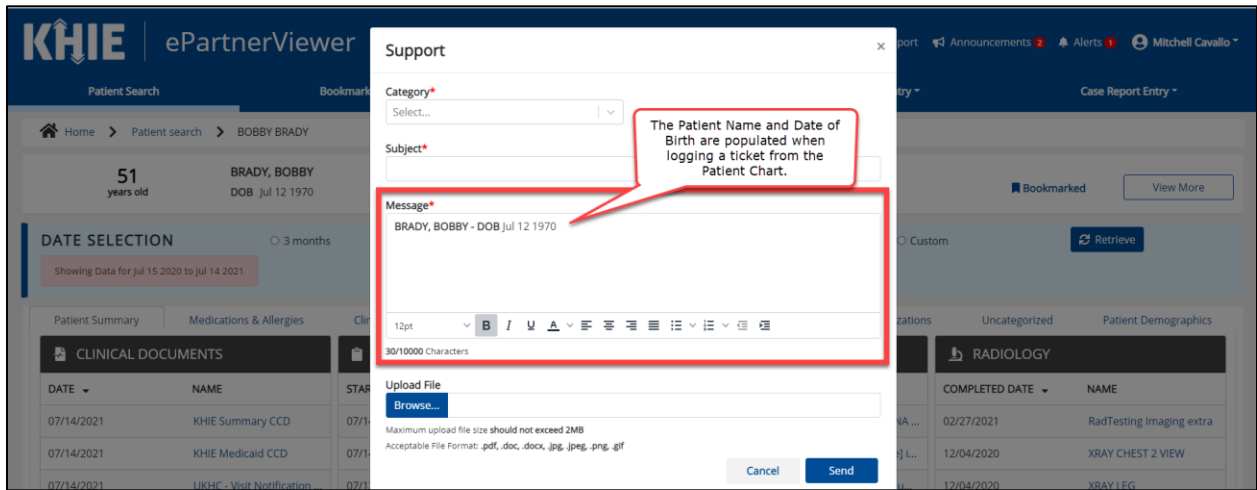
- 4. Enter the **Subject** of the support ticket in the Support textbox. The *Subject* is the reason you are entering the support ticket.



**Please Note:** The *Subject* field has a 200-character limit.

- 5. Enter the message you wish to relay in the *Message* textbox.

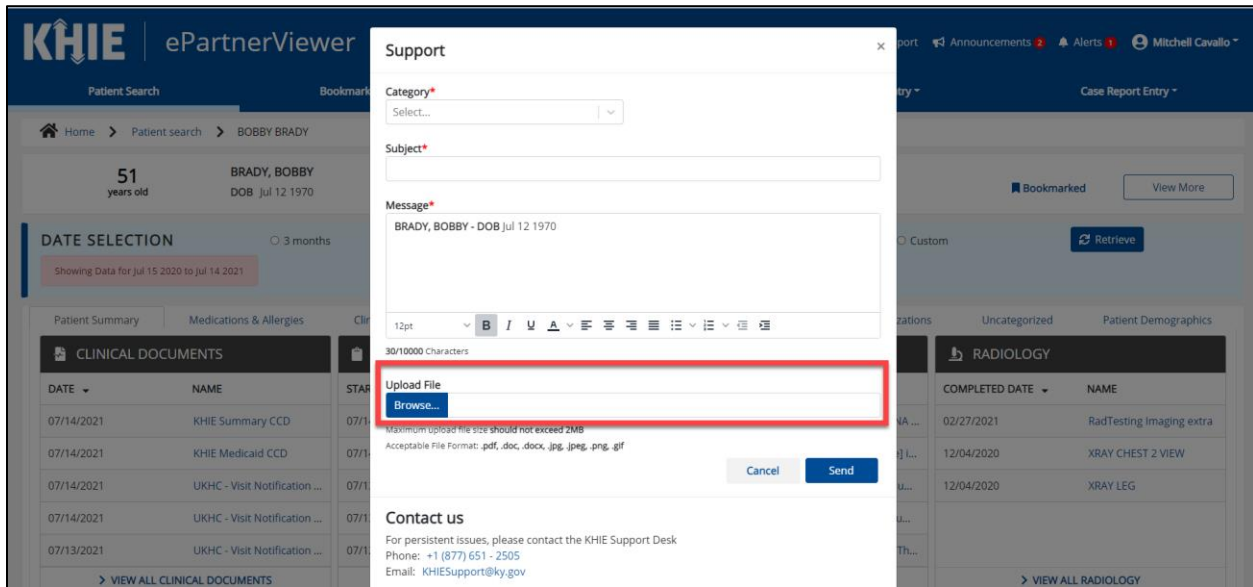
**Please Note:** The *Message* textbox field has a 10,000-character limit.



**Please Note:** If you click on the Support icon while you are in a patient chart, the patient name and date of birth will automatically populate in the Message text box.

If you click on the Support icon when you are not in a patient's chart, no patient information is populated. For example, if you click on the Support icon while on a general screen like myDASHBOARD, the patient information is not automatically included in the Message text box.

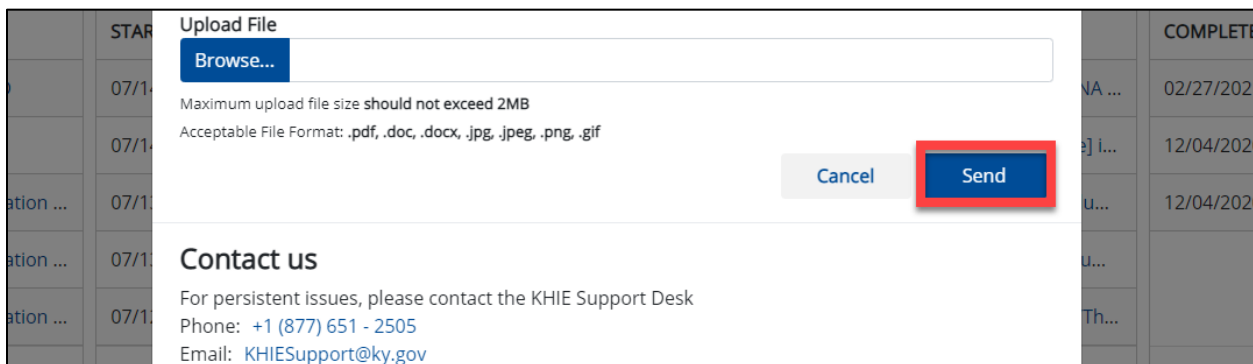
6. Click **Browse** to upload a supporting document of file.



**Please Note:** The document must have an acceptable file format and file size.

- The accepted file formats are .pdf, .gif, .png, .jpg, and .jpeg.
- The maximum file size for a document is 2MB (megabytes).

7. Click **Send** to submit the support ticket.

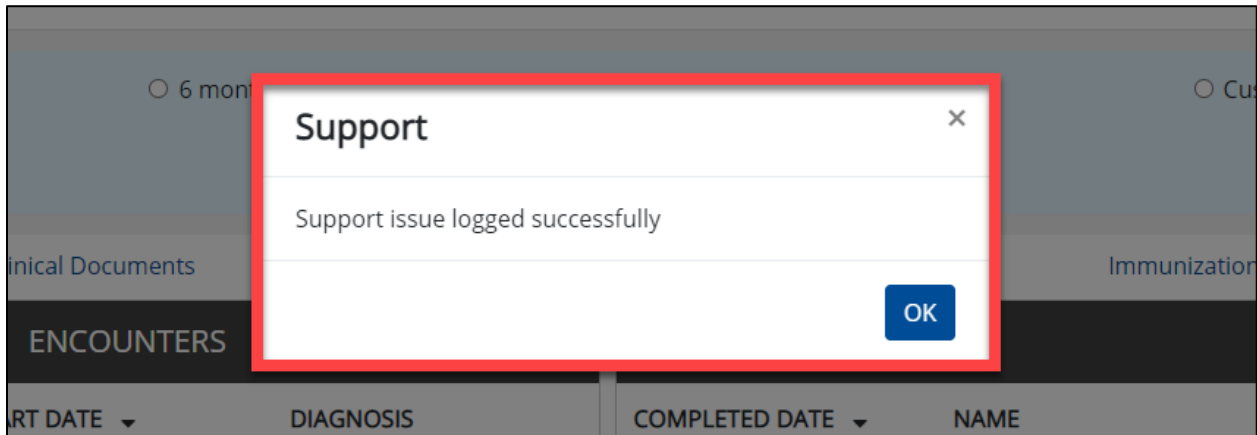


**Please Note:** The ticket is scanned for viruses before it is saved in the issue log.

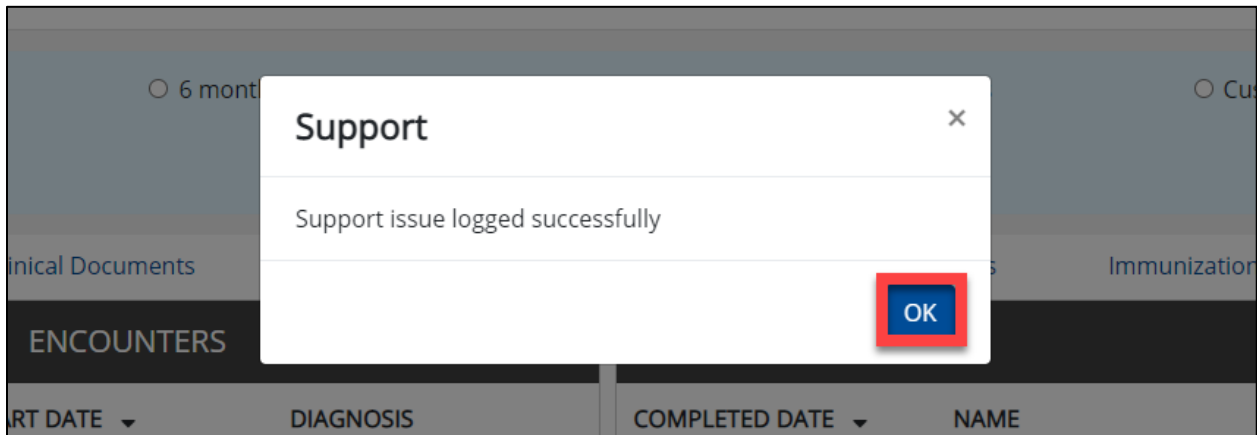
If a virus is detected, the following error message will display: *A virus has been detected. Please upload another file.*



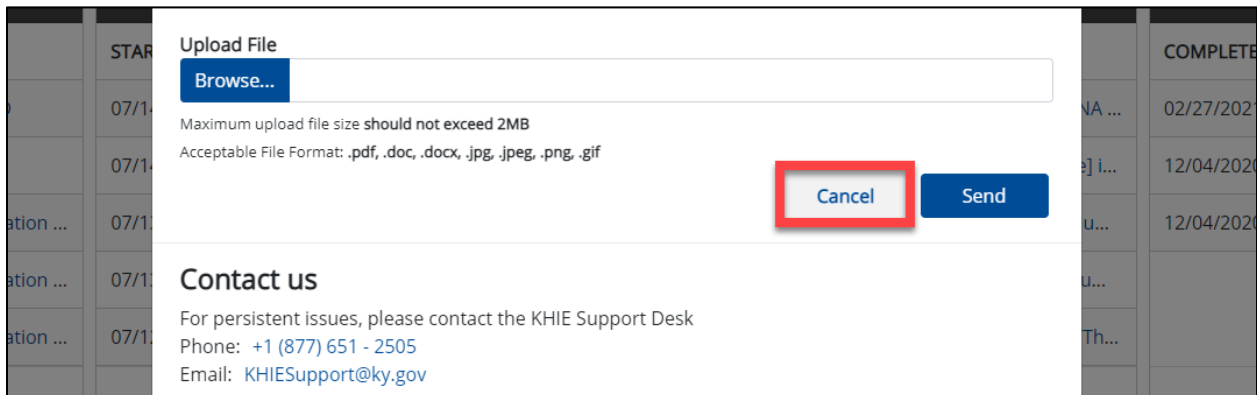
8. After clicking Send, a pop-up displays stating *Support issue logged successfully*.



9. Click **OK** to close the pop-up.



10. To cancel a submission, click **Cancel**.



## 7 Event Notification Enhancement

### Recent Notifications

An organization’s *Event Notification Admin(s)* can now view the actual notifications received for all patients associated with all users within the same organization.

All Event Notifications now include a column titled *Organization User*. This column displays the username and the associated email address of the user for whom the original notification was generated (e.g. John Smith, [jsmith@someemail.com](mailto:jsmith@someemail.com)). Adding the ability to view the actual notification and knowing which users are monitoring which patients, the *Event Notification Admin* can manage the notifications more efficiently.

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE	ORGANIZATION USER
Delete	05/24/2021 1:30:59 am	07/08/2021 12:33:49 pm	Possible Positive Test Result for COVID-19	AMOHAMMAD	SODSDGGGWB.PCMNGGFFB YE	28 years	Vikram Patel (vikrapate@deloitte.com)
Delete	09/25/2019 4:30:15 pm	07/08/2021 11:03:49 am	Hospital Admission	AMOHAMMAD	SODSDGGGWB.PCMNGGFFB YE	28 years	Vikram Patel (vikrapate@deloitte.com)
Delete	09/25/2019 4:30:15 pm	07/08/2021 10:53:49 am	Emergency Department Admission	AMOHAMMAD	SEVENSEVENREGJULYRREG	29 years	Narayan Neupane (nneupane@deloitte.com)
Delete	09/25/2019 4:30:15 pm	07/08/2021 10:53:49 am	KHIE contains suspected drug overdose information	AMOHAMMAD	SEVENSEVENREGJULYRREG	29 years	Narayan Neupane (nneupane@deloitte.com)
Delete	07/14/2021 7:00:00 am	07/06/2021 8:18:49 am	Behavioral Health Discharge	UKHC	ANOTHER,ILLHAVE	1 year	Tiffany Pierson (Tiffany.Pierson@ky.gov)

### Deleted Notifications Tab Update

An organization’s *Event Notification Admin(s)* can now view all deleted notifications for all patients associated with all users within the same organization.

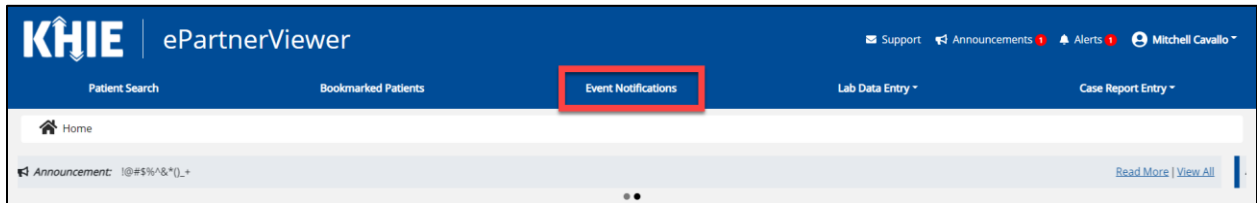
All Deleted Notifications now include a column titled *Organization User*. This column displays the username and the associated email address of the user for whom the original notification was generated (e.g. John Smith, [jsmith@someemail.com](mailto:jsmith@someemail.com)).

EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE	ORGANIZATION USER
04/30/2021 5:34:38 am	06/29/2021 9:33:47 pm	Possible Positive Test Result for COVID-19	MERCY	SJANUREE,SJANUTNE C	31 years	Vikram Patel (vikrapate@deloitte.com)
06/24/2021 12:55:00 pm	06/24/2021 1:03:45 pm	Hospital Readmission (other facility) within 30 days	TRH	BRADY,BOBBY	51 years	Ann O'Hara (Ann.O'Hara@ky.gov)
04/30/2021 5:34:38 am	06/21/2021 8:38:44 pm	Possible Positive Test Result for COVID-19	MERCY	SISATREE,SISATNE C	31 years	Vikram Patel (vikrapate@deloitte.com)
04/30/2021 5:34:38 am	06/21/2021 8:38:44 pm	Results Ready for Review	MERCY	SISATREE,SISATNE C	31 years	Vikram Patel (vikrapate@deloitte.com)
06/11/2020 12:55:15 pm	06/21/2021 8:28:43 pm	Hospital Admission	MERCY	SISATREE,SISATNE C	31 years	Vikram Patel (vikrapate@deloitte.com)

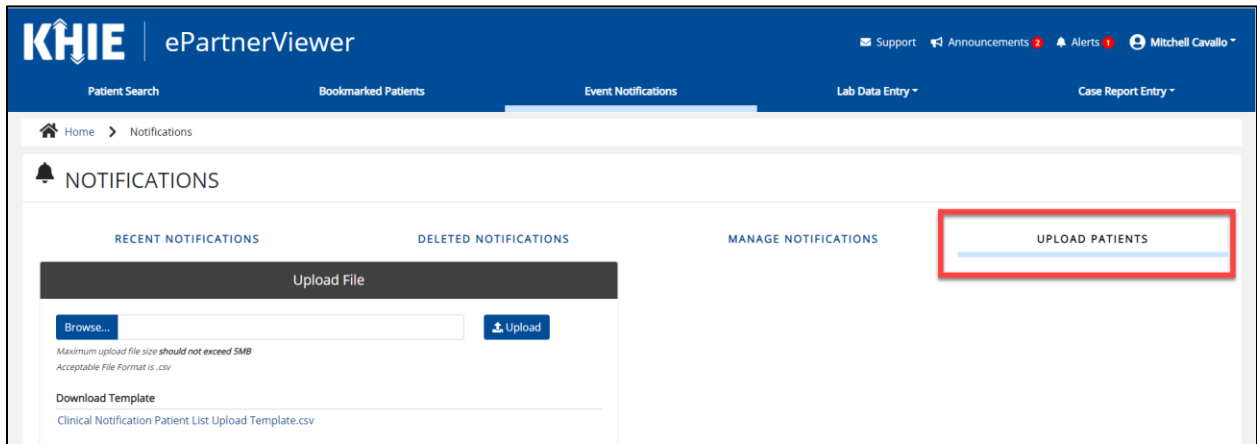
### Bulk Patient Upload

The ePartnerViewer has been updated with a new feature enabling *Event Notification Admins* to upload a bulk list of patients to receive event notifications. There is a template available to use to provide information about the patients you want to receive event notifications.

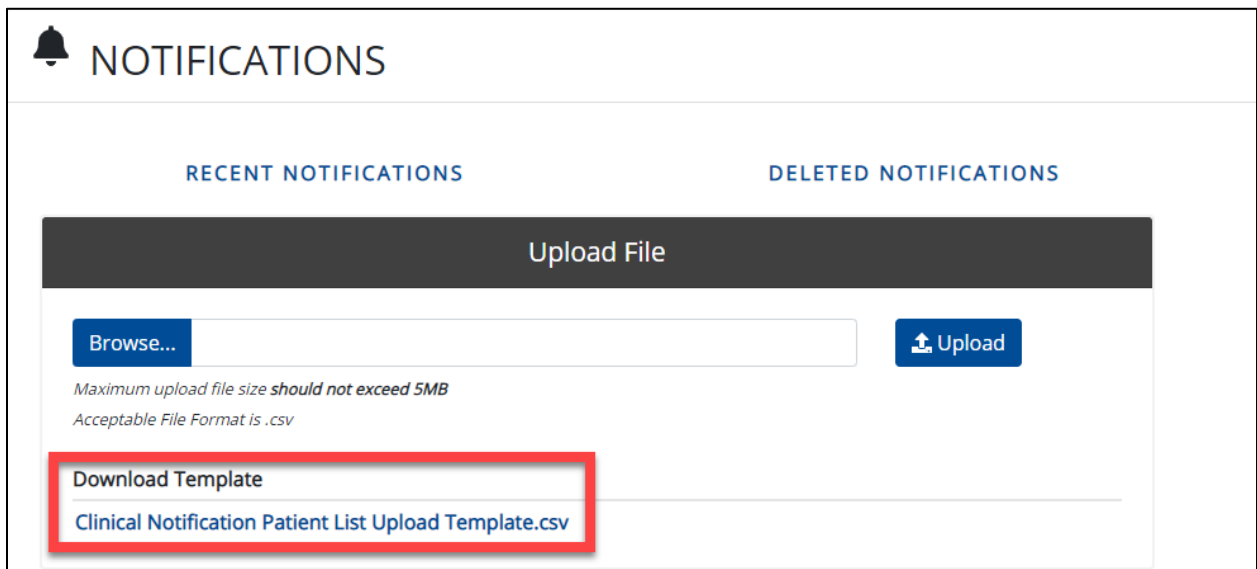
1. Click **Event Notifications** in the Blue Navigation Bar *above myDASHBOARD*.



2. Click **Upload Patients** to start uploading the patient panel.

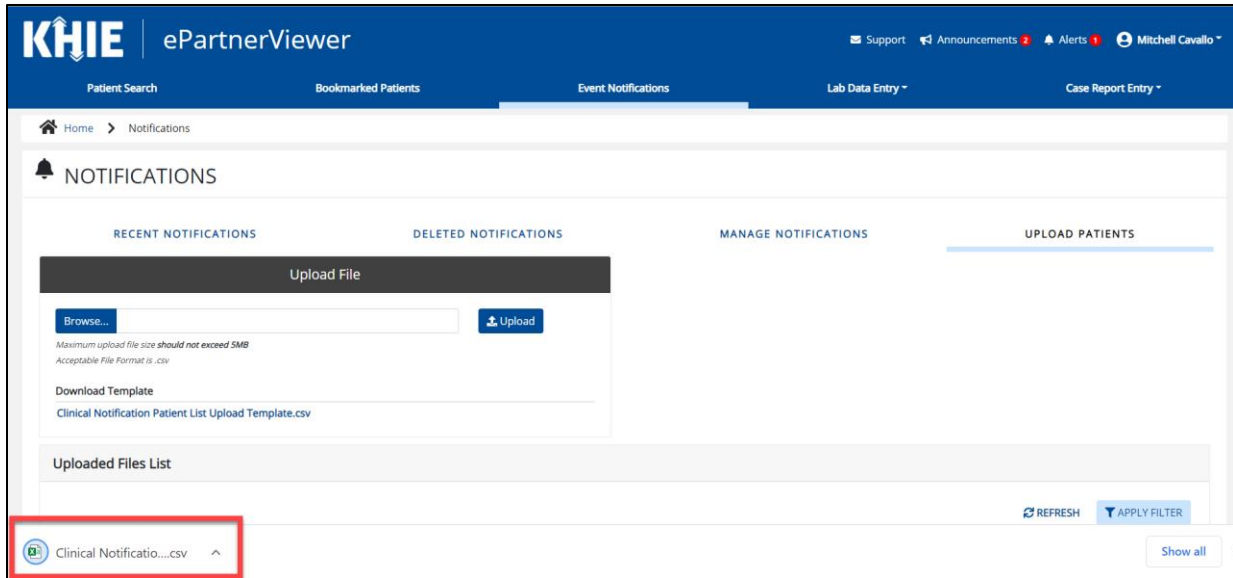


3. Click the **Clinical Notification Patient List Upload Template.csv** to download the Patient Upload template document.





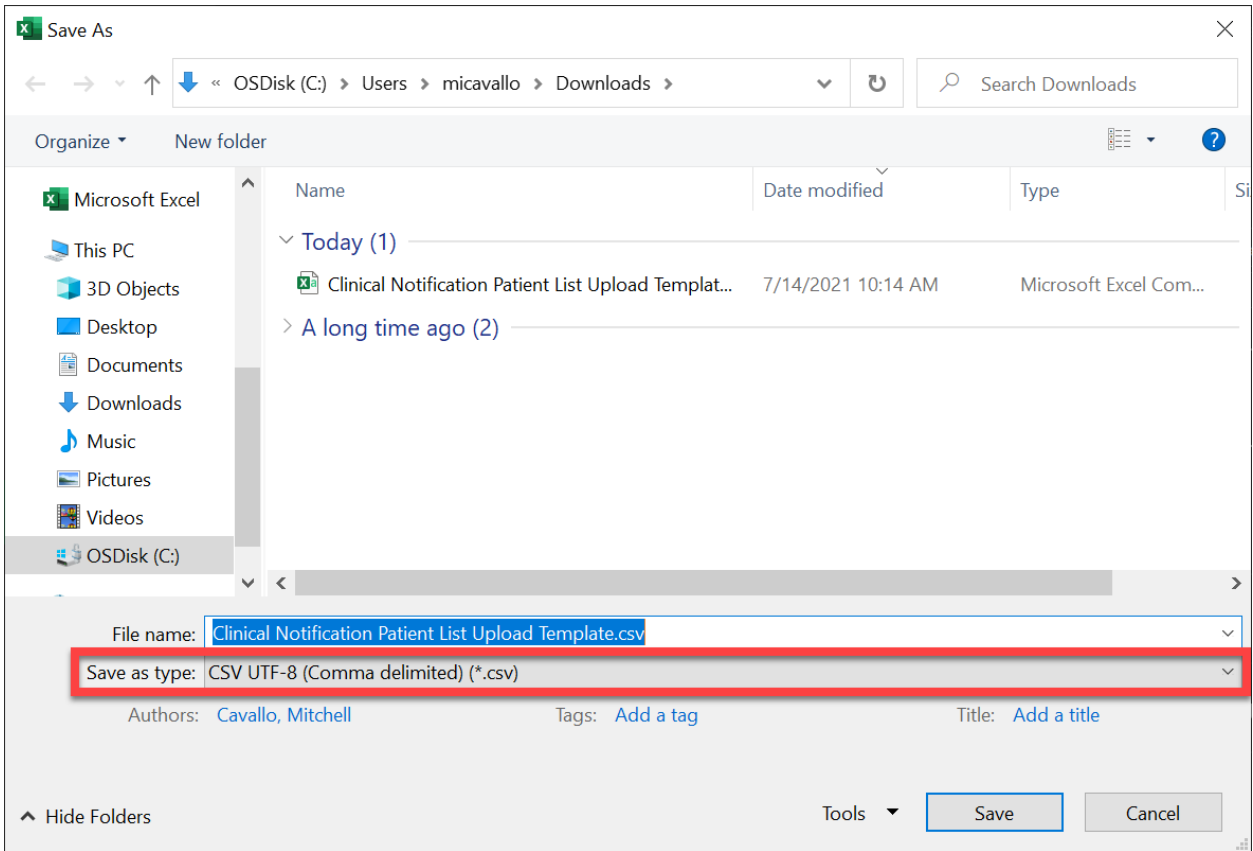
- The **Clinical Notification Patient List Upload Template.csv** downloads and appears in the browser’s downloads section.



- Complete all the fields in the **Clinical Notification Patient List Upload Template.csv** for each patient you wish to upload.

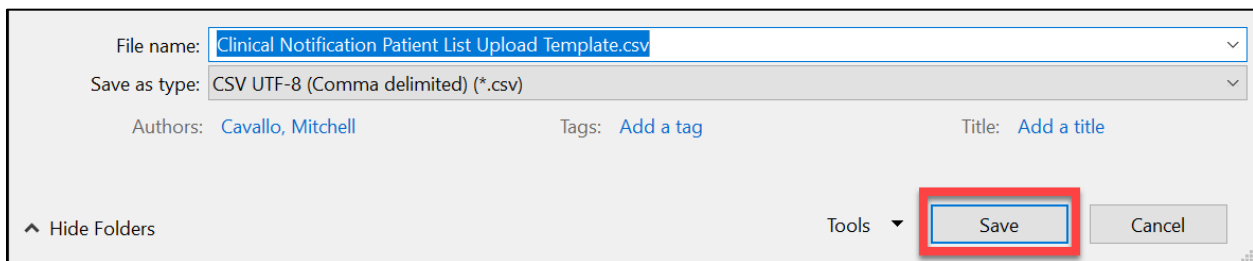
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	KOG_Email	Clinician_NPI	Organization_Code	Organization_NPI	Action	Patient_MRN	Patient_Reference_ID	Firstname	Lastname	Middle	Suffix	Street_1	Street_2	City	State	Zip
2	jsmith@tlrmc.com	2132312345	T12345	TLRMC	Add	MRN1235	TM12345	John	Mark	L	Sr	123 Main Street		Louisville	KY	40202
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6. Click **Save As** to save the Clinical Notification Patient List Upload Template.csv as a .csv file.

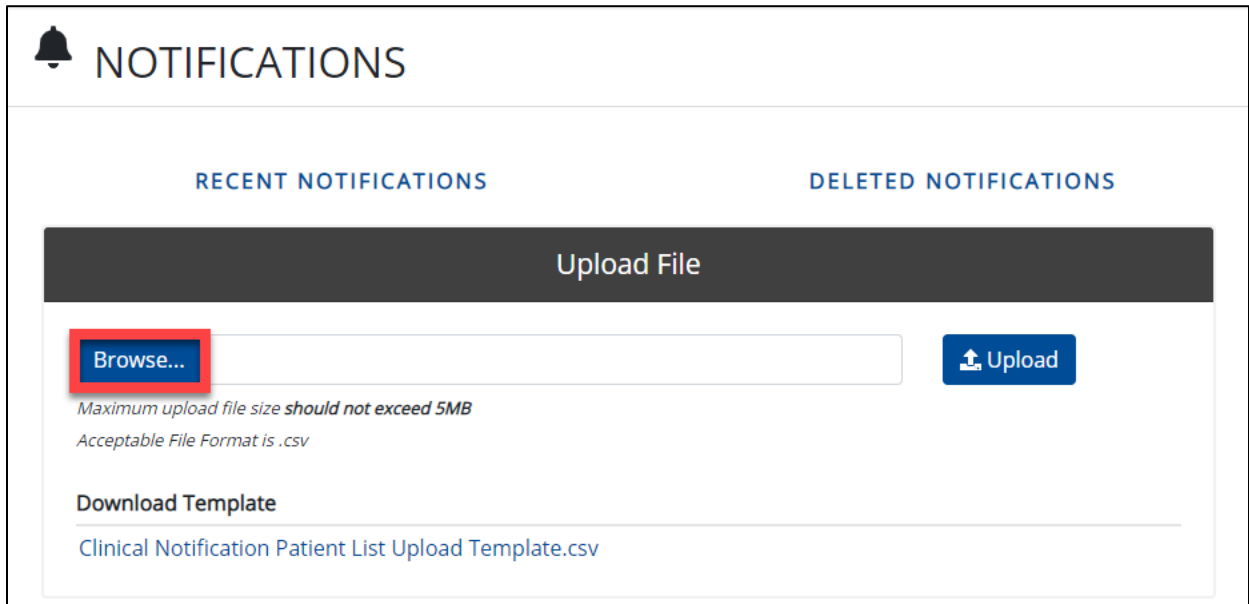


**Please Note:** The Patient Upload Template must be a .csv file. If the file is not in the .csv format, the following error displays: *“Invalid file type uploaded, please upload a .csv file.”*

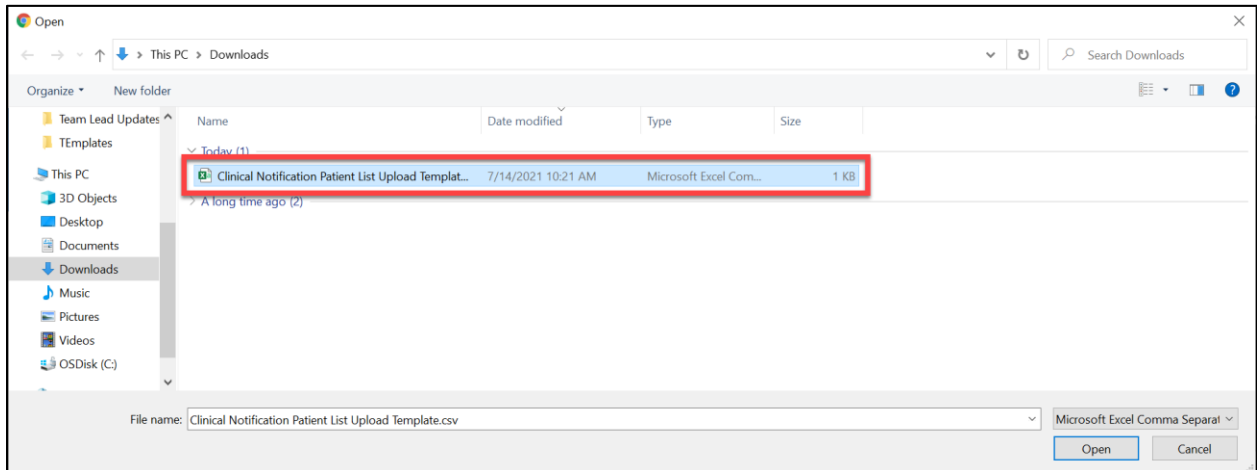
7. To save the Clinical Notification Patient List Upload Template.csv on your computer, click **Save**.



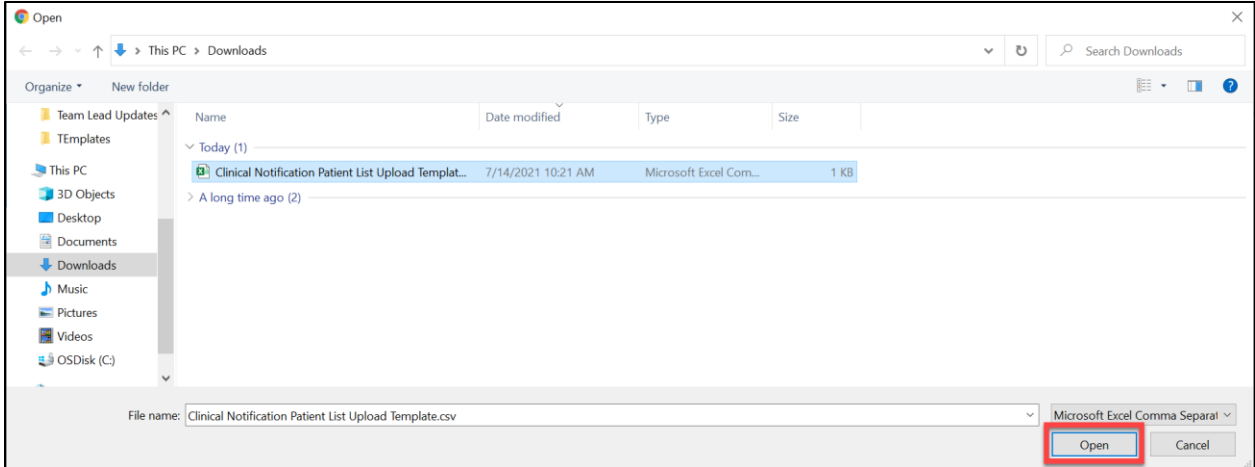
8. Click **Browse** to find the Completed Patient Upload Template.



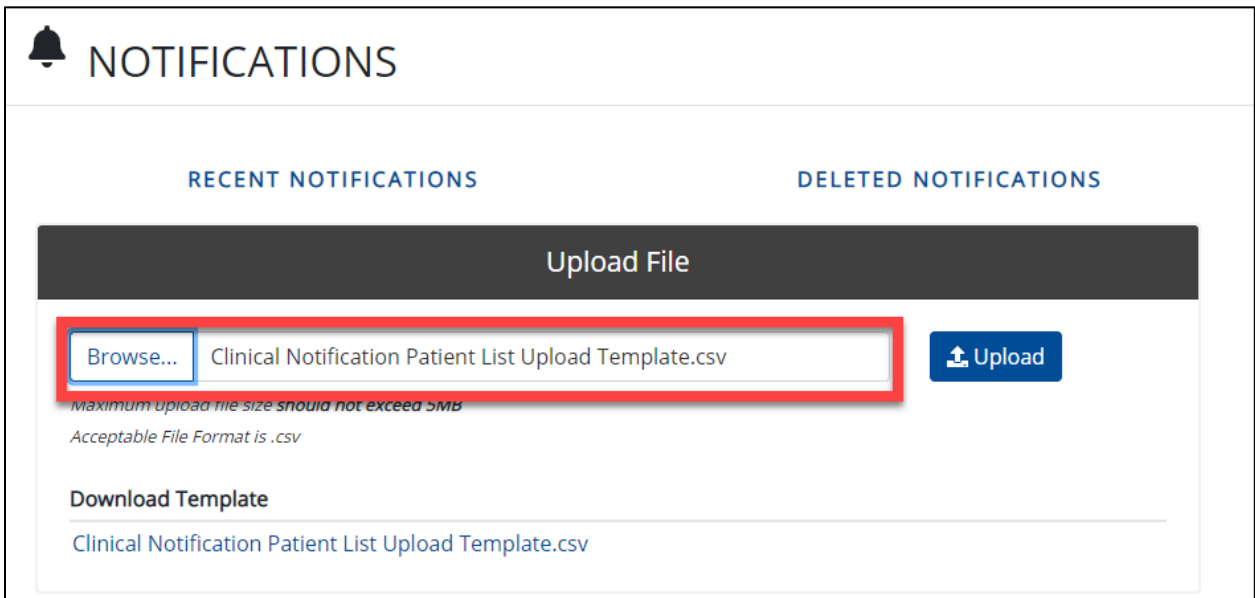
9. Select your completed **Clinical Notification Patient List Upload Template.csv**.



10. Click **Open** to enter your completed **Clinical Notification Patient List Upload Template.csv** into the Patient Upload section.

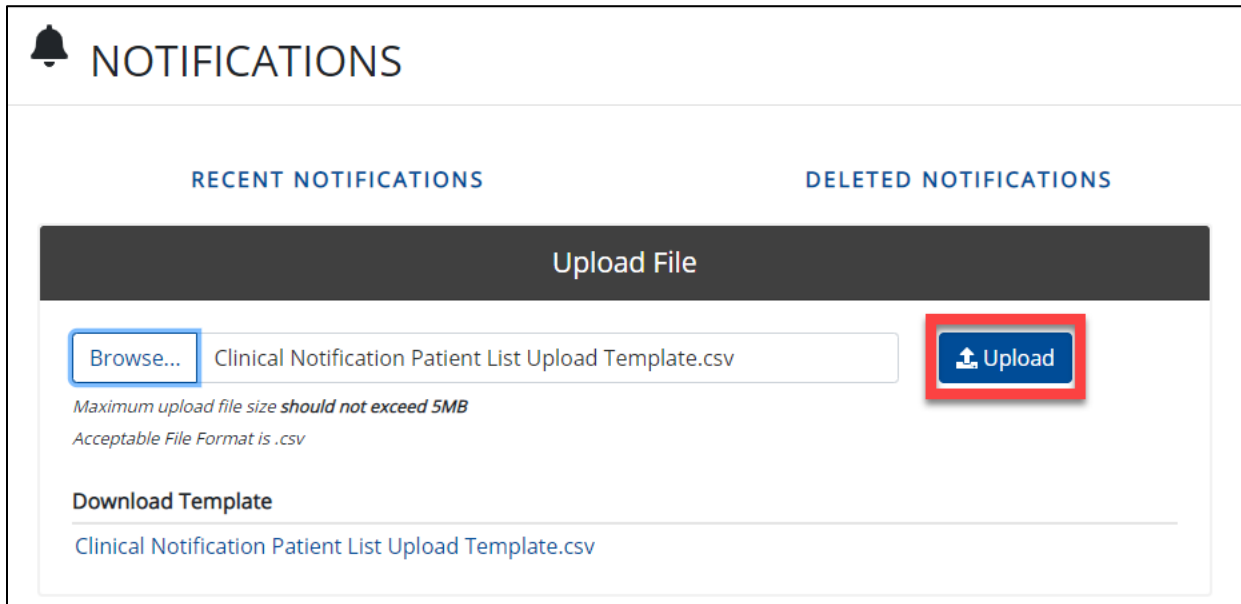


11. Your completed **Clinical Notification Patient List Upload Template.csv** appears in the Patient Upload section.

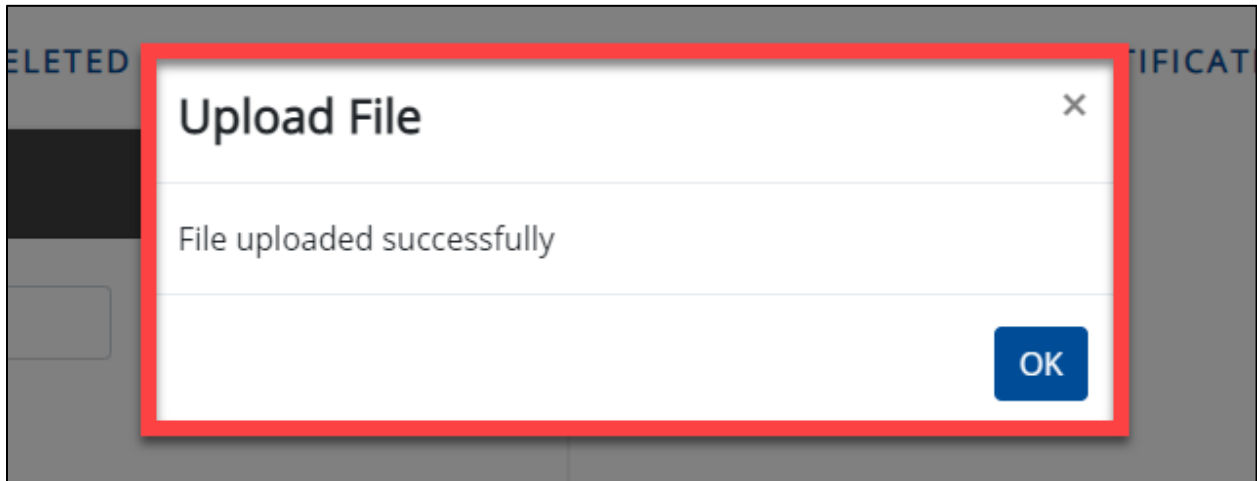




12. Click **Upload** to upload the Completed Patient Upload Template.



13. The **pop-up** displays and confirms the file upload is successful.



**Please Note:** The Patient Upload Template must be under five (5) megabytes (MB) in size.

- If the file is not under five (5) MBs the following error displays: *"Uploaded file exceeds the size limit of 5mb, please upload another file."*

The Patient Upload Template filename must be under 100 characters.

- If the filename is over 100 characters the following error displays: *"The filename cannot exceed 100 characters, please name it appropriately."*

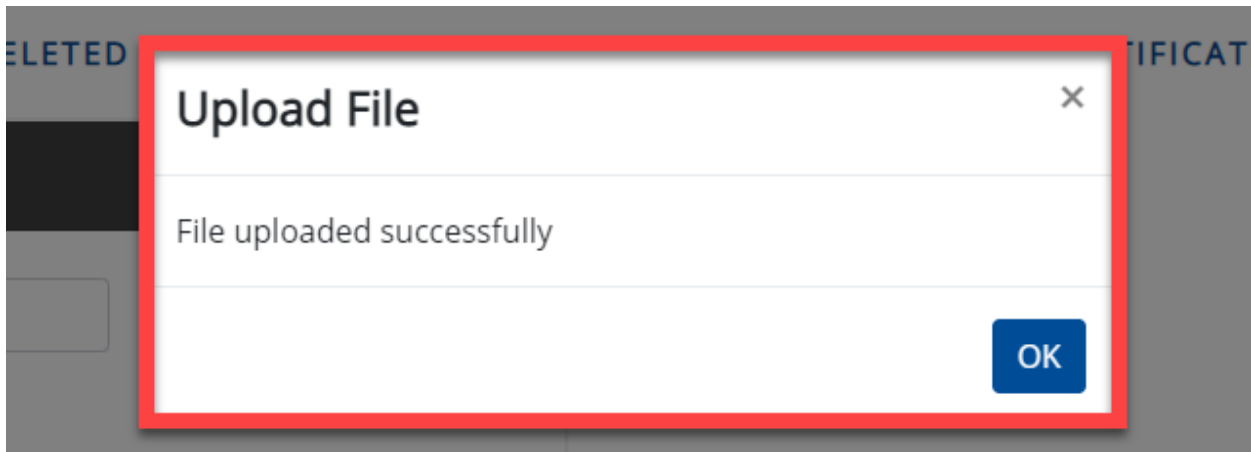
**Please Note:** The system confirms that the headers of the Patient Upload Template are in the correct order.

- If the headers are not in the correct order, the following error displays:  
*“Invalid file uploaded, please upload a valid file.”*

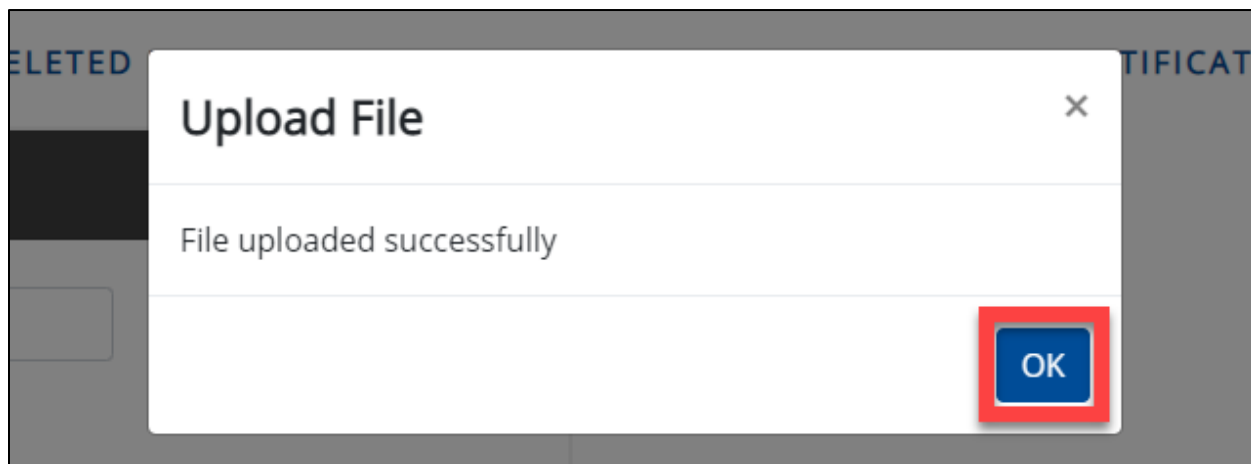
The system also confirms that the headers in the excel file are in the correct order.

- If the headers are not in the correct order in the excel file, the following error displays:  
*“The uploaded file has virus detected. Please upload another file.”*

14. Once the validations are complete, a pop-up displays the following message: *File uploaded successfully.*



15. Click **OK** to close the pop-up.





16. Your uploaded Patient List will be visible on the **Upload Patient** page.

Uploaded Files List

SHOWING 57 ITEMS

REFRESH APPLY FILTER

FILENAME	DATE UPLOADED	DATE PROCESSED	STATUS	ACTION	USER
Clinical Notification Patient List Upload Template.csv	Jul 14 2021 10:28		Pending		Mitchell Cavallo (mitchell.cavallo@ky.gov)
Patient_Records_070821.csv	Jul 08 2021 10:20	Jul 08 2021 10:25	Processed With Errors		Narayan Neupane (nneupane@deloitte.com)
440272(example)- pa.csv	Jun 30 2021 15:53	Jun 30 2021 15:54	Success		Philip Angat (philip.angat@ky.gov)
630211.csv	Jun 30 2021 15:16	Jun 30 2021 15:24	Processed With Errors		Narayan Neupane (nneupane@deloitte.com)
440272(example).csv	Jun 30 2021 15:15	Jun 30 2021 15:24	Processed With Errors		Philip Angat (philip.angat@ky.gov)

First Back 1 2 3 4 Next Last

Maximum 5 entries per page

## 8 Technical Support

### Toll-Free Telephone Support

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

### Email Support

To submit questions electronically or request support regarding the ePartnerViewer, please email [KHIESupport@ky.gov](mailto:KHIESupport@ky.gov).