Kentucky Health Information Exchange (KHIE)

ePartnerViewer Enhancements – July 2021

User Guide

July 2021
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Document Control Information

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<td>Client</td>
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</tr>
<tr>
<td>Document Author</td>
<td>Deloitte Consulting</td>
</tr>
<tr>
<td>Document Version</td>
<td>1.0</td>
</tr>
<tr>
<td>Document Status</td>
<td>Final</td>
</tr>
<tr>
<td>Date Released</td>
<td>08/10/2021</td>
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Document Edit History

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# Table of Contents

1 **Introduction** ................................................................................................................................................................. 5  
   Overview of Changes .......................................................................................................................................................... 5  

2 **myDASHBOARD Updates** ...................................................................................................................................................... 6  
   New myDASHBOARD Icons ................................................................................................................................................. 6  
   User Profile Icon ................................................................................................................................................................. 6  
   Secure Messaging ................................................................................................................................................................. 7  
   Resources .............................................................................................................................................................................. 7  
   Preferences ........................................................................................................................................................................... 9  

3 **Announcements & Advisories** ............................................................................................................................................... 12  
   Announcements on myDASHBOARD ................................................................................................................................ 12  

4 **Document Exporting and Printing** ..................................................................................................................................... 14  
   Exporting a Document ....................................................................................................................................................... 14  
   Printing a Document ...................................................................................................................................................... 16  

5 **Patient Chart Updates** .......................................................................................................................................................... 18  
   Advance Directives .......................................................................................................................................................... 18  
   Sensitive Data Portlet ....................................................................................................................................................... 20  
   Cumulative Laboratory Records ...................................................................................................................................... 22  

6 **Support Email and ePartnerViewer Issue Log** .................................................................................................................. 24  

7 **Event Notification Enhancement** ....................................................................................................................................... 29  
   Recent Notifications ....................................................................................................................................................... 29  
   Deleted Notifications ..................................................................................................................................................... 29  
   Bulk Patient Upload ...................................................................................................................................................... 30  

8 **Technical Support** ............................................................................................................................................................ 37  
   Toll-Free Telephone Support ........................................................................................................................................... 37  
   Email Support ................................................................................................................................................................. 37
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 on [https://khie.ky.gov/Pages/index.aspx](https://khie.ky.gov/Pages/index.aspx) or in the KHIE Coach subsection in the Resources Tab located in the ePartnerViewer.
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support</td>
<td>💌</td>
</tr>
<tr>
<td>Announcements</td>
<td>🔔</td>
</tr>
<tr>
<td>Advisories</td>
<td>⚠️</td>
</tr>
</tbody>
</table>

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

DIRECTORIES

| KHIE Participant Directory
| DSM Directory
| NPI Registry
| LONIC

THE KHIE COACH

| KOG Guides
| ePartnerViewer Training Guide
| Training Video

THE NEWS EXCHANGE

| KHIE News
| Training Video

REFERENCE GUIDE

| Frequently Asked Questions
| Event Notification Types
| Tests Under Communicable Disease
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 available to review.

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.
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.

![ePartnerViewer Enhancements](image)

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

![Detailed Announcement Pop-Up](image)

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

![Close Pop-Up](image)
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**.

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.

   ![Clinical Documents Portlet](image)

   **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.

   ![Print Icon](image)

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

   ![Print Document Pop-Up](image)
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.

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**.

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

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


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.

![Summary of Patient Chart]

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

![Laboratory Portlet](image)

**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.

![Organize Documents By Lab](image)
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:

<table>
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<td>Patient Search</td>
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</tr>
<tr>
<td>Patient Demographics</td>
<td>Reports</td>
</tr>
<tr>
<td>Summary CCD</td>
<td>Patient Documents</td>
</tr>
<tr>
<td>Portlets</td>
<td>Technical</td>
</tr>
<tr>
<td>Medications &amp; Allergies</td>
<td>Security</td>
</tr>
<tr>
<td>Laboratory &amp; Pathology</td>
<td>Other</td>
</tr>
</tbody>
</table>

1. To log a support ticket, click the **Support Icon**.
2. The **Support pop-up** displays.

![Support pop-up](image)

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

![Category dropdown](image)
4. Enter the **Subject** of the support ticket in the Support textbox. The **Subject** is the reason you are entering the support ticket.

![Support Ticket Interface]

**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.

![Message Textbox]

**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.

![Image of ePartnerViewer interface with support ticket form]

**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.

![Image of ePartnerViewer interface with support ticket form]

**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). 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.

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

5. Complete all the fields in the **Clinical Notification Patient List Upload Template.csv** for each patient you wish to upload.
6. Click **Save As** to save the Clinical Notification Patient List Upload Template.csv as a .csv file.

![Save As Dialog Box](image)

**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**.

![Save Dialog Box](image)
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.

![Upload File](image)

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.

8 **Technical Support**

**Toll-Free Telephone Support**

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

**Email Support**

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